

## PB - BASICS Quick Start: Portfolio Benchmarking Basics

Everything you need to set up your free Energy Benchmarking in 6 easy steps



Get Started

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Feature Unlocked



#### STEP 2 **Check Your Email**

	You should receive an email with the next step to create your accour
Create Now!	
First Name * Last Name *	
First Name Last Name	
Work Email *	
Email	
Company Website URL	Welcome to Switchl
Work Phone	Welcome to Switch.
Company Name *	We've created your Switch profile and it's ready for you to start tracking your energy usage.
	Continue setting up your account to explore this feature.
company Name	Continue Account Creation
Country *	
Select ~	
By creating account I agree to the <u>terms and conditions</u> from Switch Automation.	SWITCH AUTOMATION
	f 🏏 in 🔤
Create FREE account	Switch Automation 1536 Wynkoop Street, Suite 220 Denver Colorado 80202 United States
	Unsubscribe   Support

#### STEP 3 Login and Get Started

#### STEP 4 Add Sites

Once you see your Portfolio Benchmarking Basics page, start the Add Site wizard from the bottom right corner.

Basic energy benchmarkin	g for your building portfolio.	Q P
	Durant Garage	
	View the progress for each step of the Portfole Benchmarking guide. Start your guide by selecting add sites button below or continue by selecting your step from the left panel. Exit any time, your progress will be saved.	
	Step 1: Site Integration         +Add Site           0 Site in your portfolio         +Add Site	
	Step 2: Utility Data Integration No data uploaded	
	Step 3: Baseline Creation Switch automatically uses the earliest uploaded data. To manually set the date of your baseline, <u>Contact Switch</u>	
		+ Add Site

Choose to add single sites or multiple. To add multiple sites at once, download the template and follow the attached instructions.

Save the file with your sites to save for use later. Drag the file into the upload space in the wizard.

Import bulk sites         Download the file template below, once your site details are populated drag & drop the file to upload.         Image: Prepare site details and / or integration file         Download the template to understand which fields are mandatory vs. optional.         Image: Drag & Drop your file(o) here         (Files supported. CSV)	Import bulk sites         Download the file template below, once your site details are populated drag & drop the file to upload.         Image: Prepare site details and / or integration file         Download the template to understand which fields are mandatory vs. optoroul.         Image: Drag & Drop your file(s) here         Urities supported: CSV()		Would you like to add	single or multiple s	ites? Multiple	Sites Single Site	
Import bulk sites         Download the file template below, once your site details are populated drag & drop the file to upload.         Import bulk sites         Prepare site details and / or integration file         Download the template to understand which fields are mandatory vs.eptonal.         Import bulk sites	Import bulk sites         Download the file template below, once your site details are populated drag & drop the file to upload.         Import bulk sites         Prepare site details and / or integration file         Download the template to understand which fields are mandatory vs. optional.         Import bulk supported: CSVy				_		
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Image: Big Prepare site details and / or integration file       Download the Template         Note: Download the template to understand which fields are mandatory vs. cptional.       A         Image: Drag & Drop your file(s) here       C(Files supported: CSV)	The complete to understand which fields are mandatory vs. cyclonal.         Download the Templete           Note: Download the template to understand which fields are mandatory vs. cyclonal.         x           Image: Drag & Drop your fields here         x           (Files supported. CSV)         x	1	lownload the file template be	low, once your site detai	ls are populated drag	s & drop the file to upload.	
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Note. Download the template to understand which fields are mandatory vs. optional.	Note. Download the template to understand which fields are mandatory vs. optional.						
(Files supported. CSV)	(Files supported. CSV)	Note: Download the templa	te to understand which fields are	mandatory vs. optional.			>
(Files supported: CSV)	(Files supported: CSV)				Drop		
(Hies supported: CSV)	(riles supported: USV)			your me	(s) nere		
				(Files supported	1: CSV)		

#### Download the template here

\*Save this file. You will need the Site Code for utility uploads.

## step 4.5 **(Errors)**

#### Sites data file

Preview your sites data for upload confirmation

	N	ote: These fields may be edit	ed later if needed. $ imes$			
Site Name	Address	City	State	Zip	Country	Floor Area (
Brainbox Demo	507 Kent Street	Sydney	New South Wales	2000	Australia	11.427
Brainbox Demo	507 Kent Street	Sydney	New South Wales	2000	Australia	11.427
Brainbox Demo	507 Kent Street	Sydney	New South Wales	2000	Australia	11.427
Brainbox Demo	507 Kent Street	Sydney	New South Wales	2000	Australia	11.427
Brainbox Demo	507 Kent Street	Sydney	New South Wales	2000	Australia	11.427
Brainbox Demo	507 Kent Street	Sydney	New South Wales	2000	Australia	11.427
Brainbox Demo	507 Kent Street	Sydney	New South Wales	2000	Australia	11.427
Brainbox Demo	507 Kent Street	Sydney	New South Wales	2000	Australia	11.427

To see specific errors found in your file, select the red "Errors" bubble in the top right of the grid.

Adjust the errors in your saved file, then return to the previous screen to upload the updated file again.

	Would you like t	o add single or m	ultiple sites? Multiple	e Sites Single Site	2	
		Sites Preview your sites da	s data file ata for upload confirmation			
		Note: These fields may	y be edited later if needed. $ imes$			
There were errors during val	idation. Please correct the errors from th	e below grid or in your cs	v file and return to the previous scre	en to re-upload.		Errors: 1
Site Name	Address	City	State	Zip	Country	Floor Are
Brainbox Demo	507 Kent Street	Sydney	New South Wales	2000	Australia	11.427
Brainbox Demo	507 Kent Street	Sydney	New South Wales	2000	Australia	11.427
Brainbox Demo	507 Kent Street	Sydney	New South Wales	2000	Australia	11.427
Brainbox Demo	507 Kent Street	Sydney	New South Wales	2000	Australia	11.427
Brainbox Demo	507 Kent Street	Sydney	NSW	2000	Australia	11.427
Brainbox Demo	507 Kent Street	Sydney	New South Wales	2000	Australia	11.427
Brainbox Demo	507 Kent Street	Sydney	New South Wales	2000	Australia	11.427
Brainbox Demo	507 Kent Street	Sydney	New South Wales	2000	Australia	11.427

When the file has no errors, you will not see the red error message.

Site data can be updated at any time and additional sites can be added.

### **Feature Unlocked**

Uploading at least 2 sites, unlocks your portfolio summary. This is set at your new home page which you can access at any time from the menu on the left.



### STEP 5 **Upload Utility Data**

O Search

Return to Portfolio Benchmarking Basics from the left menu under Applications.



It's time to upload utility data.

Download the template for electricity data and follow the attached instructions.

Site: Switch Showroom

✓ Portfolio A ✓

#### 💭 🛛 John Doe 🗸 🤦 ណ Portfolio Benchmarking Basics Upgrad Your Guide Progress 品 25% Complete this action guide to gain full access Note: You are on the basic version of Portfolio Benchmarking. to Portfolio Benchmarking Basic Upload electricity data only. For more information about how to upgrade, Contact Switch STATUS SUMMARY STEP 2: UTILITY DATA INTEGRATION 8 Progress Summary Add / Upload Utility Data View your progress for the Portfolio Benchmarking Basics guide. Import Electricity data Download the file template below, once your utility data has been populated drag & drop the file to upload. Add additional utility data at any time using task insights. $\odot$ Site Details/Integration Sites must be added to your portfolio before Prepare utility details template ownload the Templa 10 utility data can be uploaded. + Edit/Add Sites 🛛 📀 Completed 23 sites uploaded. Portfolio Summary Unlocked. Click here Drag & Drop your file(s) here 野 Utility Data Integration Upload electric data (Files supported: CSV) STEP 3 **Baseline Creation** Switch automatically uses the earliest uploaded data To manually set the date of your baseline, Contact Switch

#### Download the template here

\*You will need the SITE Code from your site data upload

## step 5.5 **(Errors)**

To see specific errors found in your file, select the red "Errors" bubble in the top right of the grid.

Adjust the errors in your saved file, then return to the previous screen to upload the updated file again.

			STEP 2: UTIL Add / Upl	ITY DATA INTEGRATION oad Utility Data			
			Valida Preview your upload	ate data file			
	1 There were error	rs during validation. Please correct the error	s in your csv file and return to	the previous screen to re-upload.			
					Dupli	cate Records: 2	Missing Devices: 1
	Site Code	Account Identifier	Service Type	Unit of Measurement	Date	Usage	Cost
	T	Τ	Τ	Τ	Τ	Υ	
	N522	700106001	Electric	kWh	2021-06-01	194	24.21
	N522	273727	Electric	Kwh	2021-07-01	0	17.77
	N522	273727	Electric	kWh	2021-08-16	0	18.31
	N522	720106007	Electric	kWh	2021-08-16	11200	201.96
	N522	273727	Electric	Kwh	2021-06-01	0	17.18
	N522	720106007	Electric	Kwh	2021-03-01	9040	178.52
Re-upload file		7	Electric	kWh	2021-08-16	11200	201.96
Select previous button to re-u	pload utility data	file	Electric	Kwh	2021-06-01	0	17.18
		7	Electric	Kwh	2021-03-01	9040	178.52
	Cle	ose					
Previo	nus					Cancel	Upload

When the file has no errors, you will not see the red error message.

		ء Add	TEP 2: UTILITY DATA INTEGRATION	ita			
		Preview y	Validate data file our uploaded utility file in the gri	d below			
Site Code	Account Identifier	Service Tune	Unit of Massurament	Date	litzga	Cost	
onte obde		земетуре	T	T	T	T	
N522	700106001	Electric	kWh	2021-06-01	194	24.21	-
N522	273727	Electric	Kwh	2021-07-01	0	17.77	
N522	273727	Electric	kWh	2021-08-16	0	18.31	
N522	720106007	Electric	kWh	2021-08-16	11200	201.96	
N522	273727	Electric	Kwh	2021-06-01	0	17.18	
N522	720106007	Electric	Kwh	2021-03-01	9040	178.52	
N522	273727	Electric	kWh	2021-08-16	0	18.31	
N522	720106007	Electric	kWh	2021-08-16	11200	201.96	
N522	273727	Electric	Kwh	2021-06-01	0	17.18	
N522	720106007	Electric	Kwh	2021-03-01	9040	178.52	
views						Canaal	Union
vious						Jancer	Opioad

Utility data can be updated at any time and additional data can be added.

## **Feature Unlocked**

Uploading at least 12 months of utility data unlocks your Energy Use Intensity (EUI) score. This can be viewed for each site on your portfolio summary and later on in your workspaces.



#### STEP 6 Access Your Dashboards (Workspaces)

The final step is to select "Complete Portfolio Benchmarking Basics" from the bottom right.



You will now have access to your energy benchmarking dashboards (Workspaces) which you can access in the left menu under applications.

Included in this free version are two workspaces:

**Portfolio Utility Summary** - details about your highest and lowest energy consuming sites, energy consumption compared to your baseline, and energy use intensity per site.

Utility Table Summary - a table to filter and sort all of your uploaded data for comparison, reporting, and analysis.

Additional workspaces are available with the upgraded version of Portfolio Benchmarking.

## **Using or Changing Your Data**

The Actions button in the top right corner will direct you to the most common actions regarding your data.



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Use this button to:

- add or edit sites or utility data
- share information from your workspaces

## **Upgrade to the Full Version of Portfolio Benchmarking**

You always have the option to upgrade from the button in the upper right corner.



A request to upgrade is not a commitment. When you are ready to upgrade, a Switch representative will contact you via email and help you work through the upgrading process.