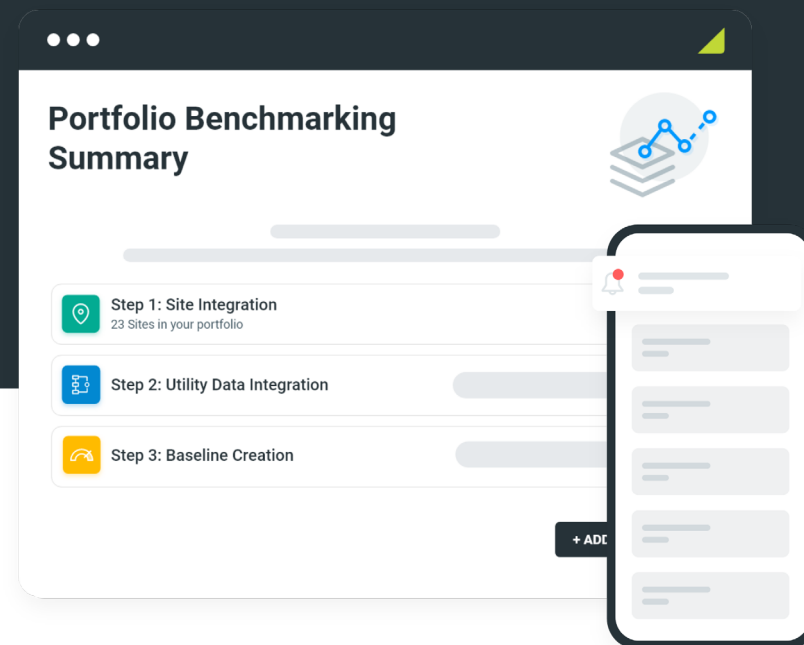


PB - BASICS

# 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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## STEP 1

# Sign Up for Free

### Create Now!

First Name \*

Last Name \*

First Name

Last Name

Work Email \*

Email

Company Website URL

Work Phone

Company Name \*

Company Name

Country \*

Select

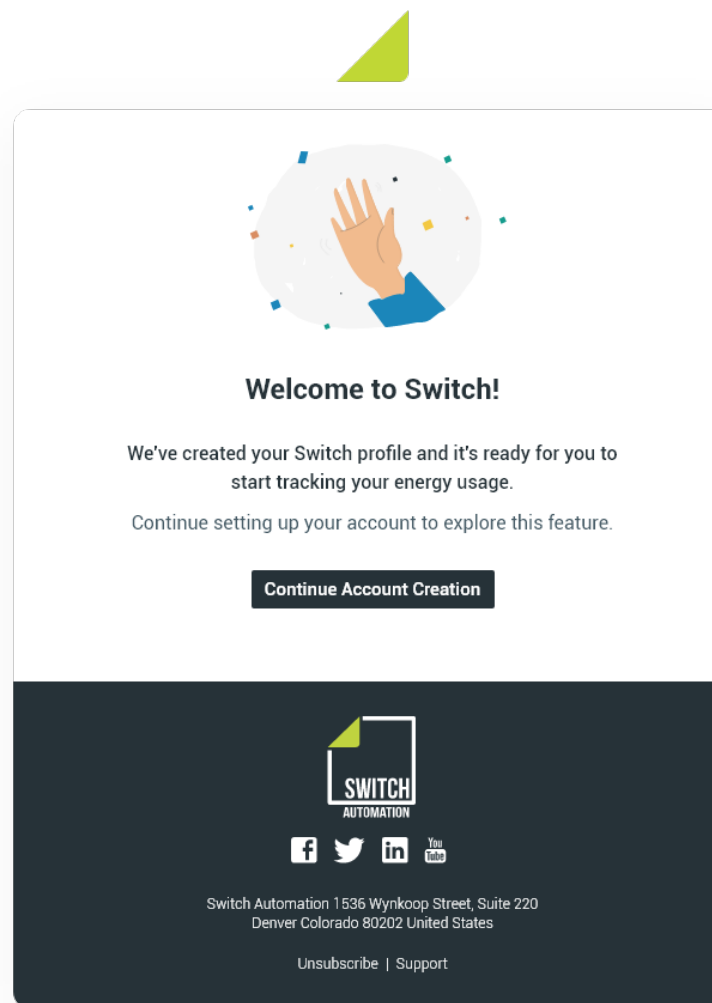
By creating account I agree to the [terms and conditions](#) from Switch Automation.

Create FREE account

## STEP 2

# Check Your Email

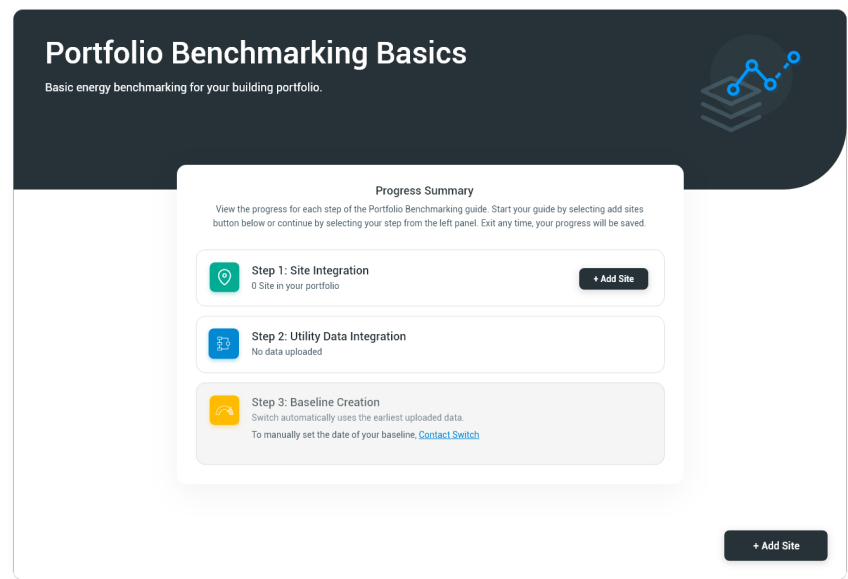
You should receive an email with the next step to create your account.



STEP 3

# Login and Get Started

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

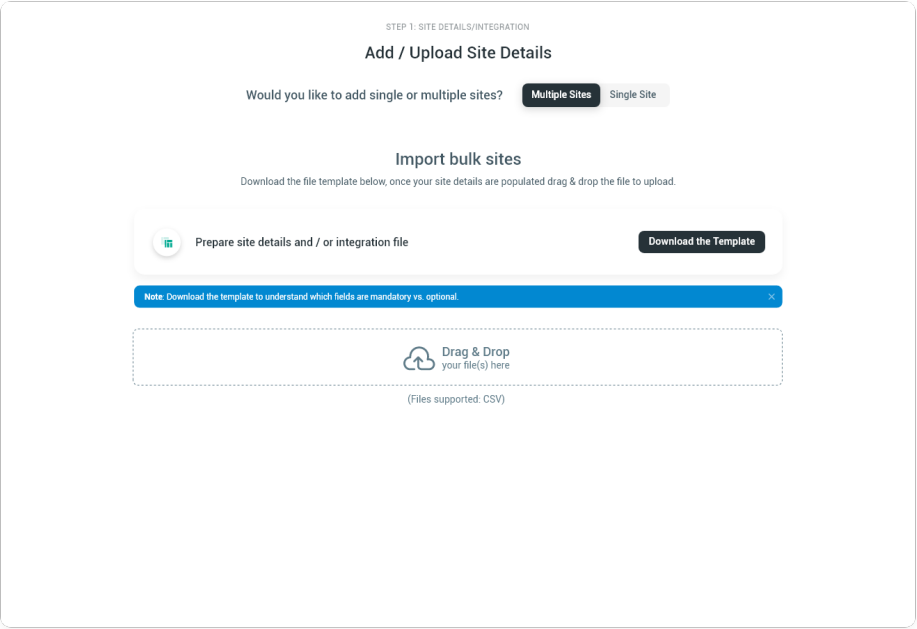


STEP 4

# Add Sites

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.



## Download the template here

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

STEP 4.5

(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 1: SITE DETAILS/INTEGRATION

Add / Upload Site Details

Would you like to add single or multiple sites?

Multiple Sites

Single Site

Sites data file

Preview your sites data for upload confirmation

Note: These fields may be edited later if needed.

There were errors during validation. Please correct the errors from the below grid or in your csv file and return to the previous screen to re-upload.

Errors: 1

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	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

Previous

Cancel

Upload

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

Sites data file

Preview your sites data for upload confirmation

Note: These fields may be edited later if needed.

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

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.

New Home Page

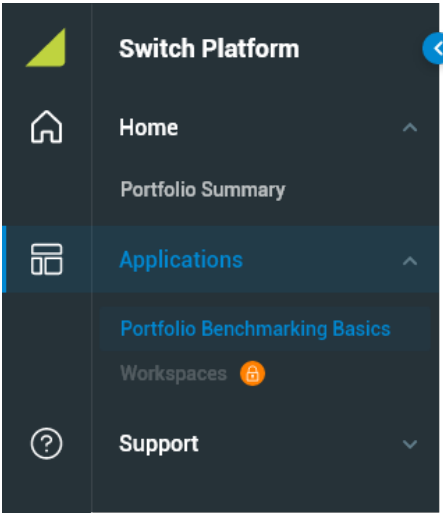
You've unlocked your personalized home page: a summary of the properties in your portfolio.

Close

STEP 5

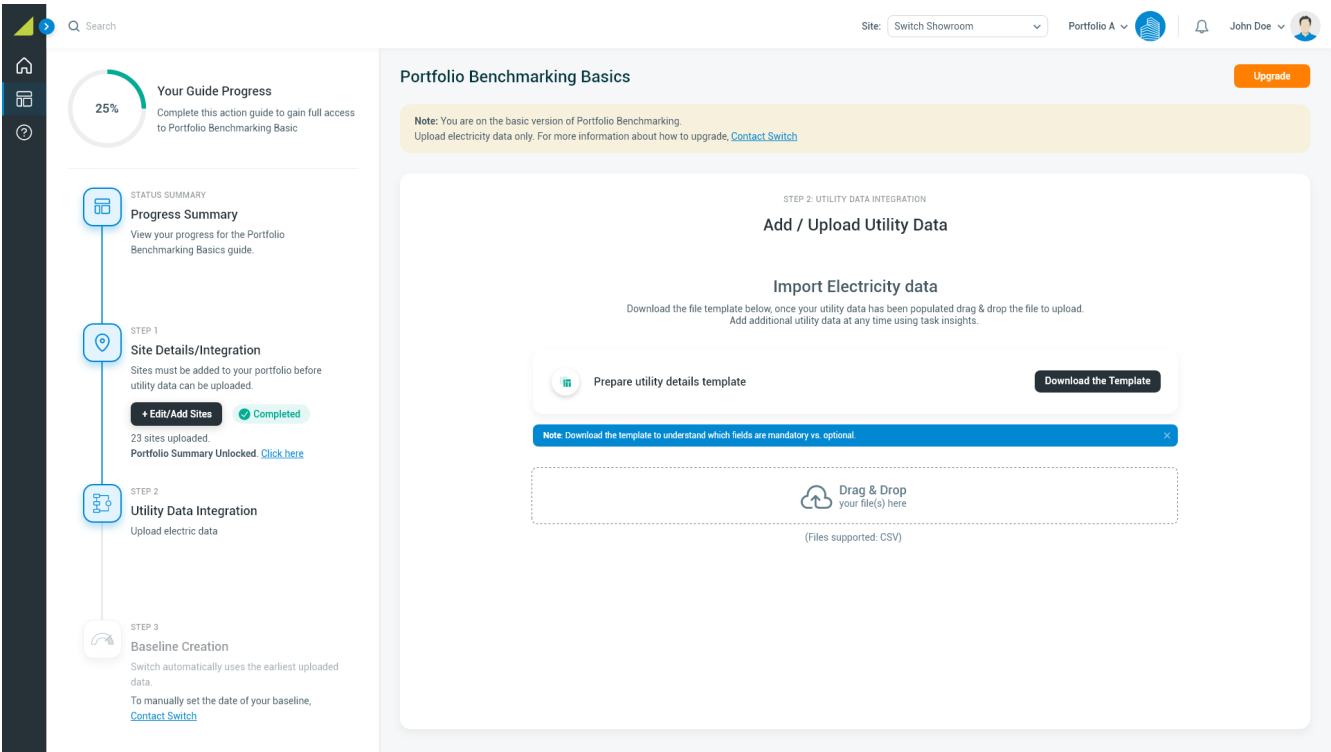
# Upload Utility Data

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.



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: UTILITY DATA INTEGRATION

Add / Upload Utility Data

Validate data file

Preview your uploaded utility file in the grid below

There were errors during validation. Please correct the errors in your csv file and return to the previous screen to re-upload.

Duplicate Records: 2

Missing Devices: 1

Site Code	Account Identifier	Service Type	Unit of Measurement	Date	Usage	Cost
NS22	700106001	Electric	kWh	2021-06-01	194	24.21
NS22	273727	Electric	Kwh	2021-07-01	0	17.77
NS22	273727	Electric	kWh	2021-08-16	0	18.31
NS22	720106007	Electric	kWh	2021-08-16	11200	201.96
NS22	273727	Electric	Kwh	2021-06-01	0	17.18
NS22	720106007	Electric	Kwh	2021-03-01	9040	178.52
NS22	273727	Electric	kWh	2021-08-16	0	18.31
NS22	720106007	Electric	kWh	2021-08-16	11200	201.96
NS22	273727	Electric	Kwh	2021-06-01	0	17.18
NS22	720106007	Electric	Kwh	2021-03-01	9040	178.52

Re-upload file

Select previous button to re-upload utility data file

Close

Previous

Cancel

Upload

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

STEP 2: UTILITY DATA INTEGRATION

Add / Upload Utility Data

Validate data file

Preview your uploaded utility file in the grid below

Site Code	Account Identifier	Service Type	Unit of Measurement	Date	Usage	Cost
NS22	700106001	Electric	kWh	2021-06-01	194	24.21
NS22	273727	Electric	Kwh	2021-07-01	0	17.77
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NS22	720106007	Electric	kWh	2021-08-16	11200	201.96
NS22	273727	Electric	Kwh	2021-06-01	0	17.18
NS22	720106007	Electric	Kwh	2021-03-01	9040	178.52
NS22	273727	Electric	kWh	2021-08-16	0	18.31
NS22	720106007	Electric	kWh	2021-08-16	11200	201.96
NS22	273727	Electric	Kwh	2021-06-01	0	17.18
NS22	720106007	Electric	Kwh	2021-03-01	9040	178.52

Previous

Cancel

Upload

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.

Your upload was successful

XX Data inputs successfully uploaded

Unlocked

Your Energy Use Intensity (EUI) Score is unlocked in Portfolio Summary

View Portfolio Summary

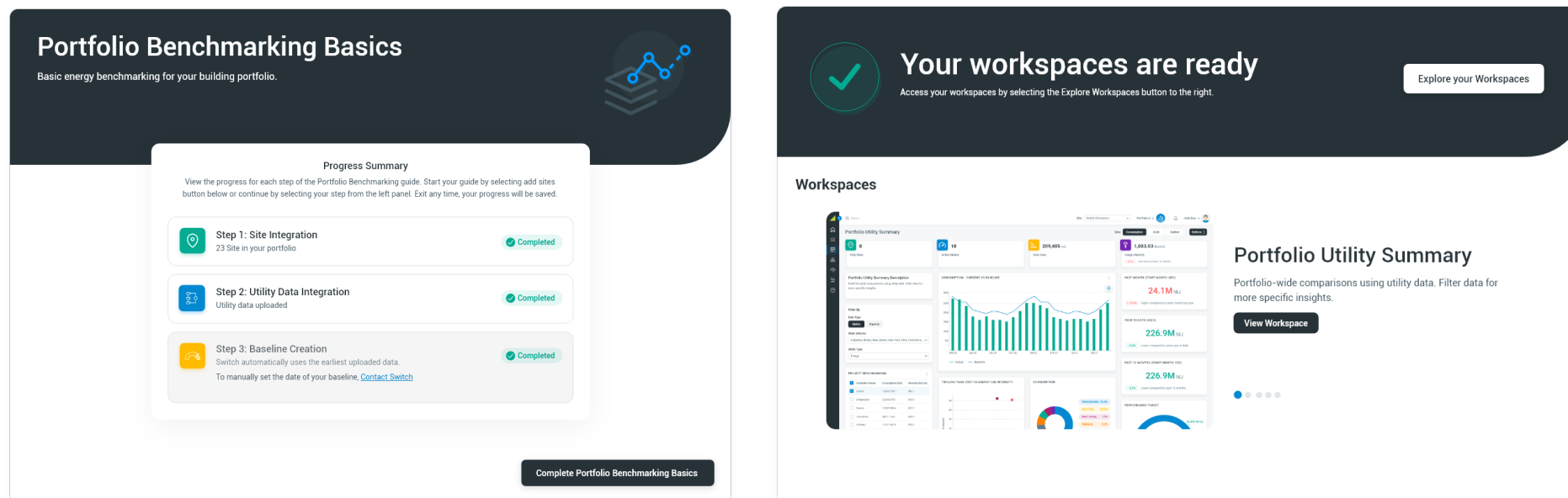
Note: An Energy Use Intensity (EUI) Score provides benchmarking data across all sites.

Continue

## 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

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



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.

An orange rounded rectangle button with the word "Upgrade" in white text.

Upgrade

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.