



HOW-TO GUIDE



Supplemental My ENERGY STAR Account Guidance for Service and Product Providers

Overview

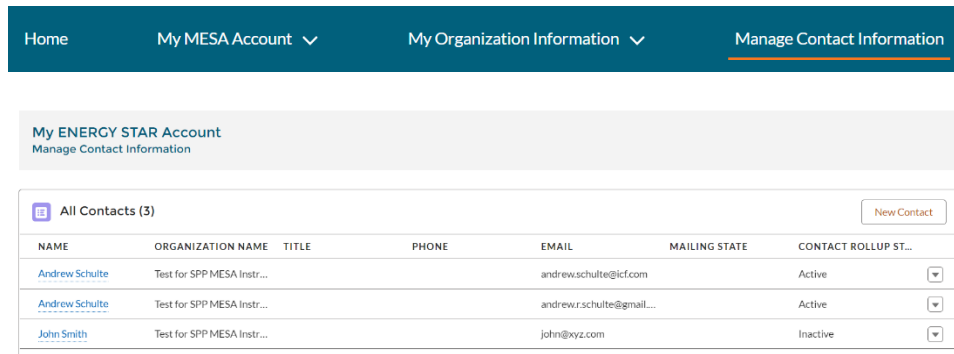
I want to...

- 1. ...Update basic organizational or contact information for my existing partnership(s).**
 - Reference the [My ENERGY STAR Account \(MESA\) Reference Guide](#) (pg. 3 – 5).
- 2. ...Review/update the list of “C&I SPP Services Offered” for my organization.**
 - Reference the [My ENERGY STAR Account \(MESA\) Reference Guide](#) (pg. 6) or click [here](#) to view the information within this document.
- 3. ...Update the point of contact associated with my organization in the list of [Most Active Service & Product Providers](#)” and/or the [Searchable Directory of Energy Service and Product Providers](#).**
 - [Jump to this section](#) of the supplemental MESA guidance for SPPs.
- 4. ...Update the point of contact associated with my organization in the list of [Service Providers That Exchange Data with Portfolio Manager via Web Services](#).**
 - [Jump to this section](#) of the supplemental MESA guidance for SPPs.
 - Note that you will need to send in a request to the [Helpdesk](#) to ensure that the updated contact information is displaying in the online list.

Supplemental MESA Guide for SPPs

- 1. “The contact information included in the list of [Most Active Service & Product Providers](#)” (and/or the [Searchable Directory of Energy Service and Product Providers](#)) is incorrect. How do I update this?”**
 - Follow the [My ENERGY STAR Account \(MESA\) Reference Guide](#) to Add (pg. 3-4) or Edit (pg. 5) individual contact information.

- Individual contact details must be created/updated via the “Manage Contact Information” link accessible from the top of the screen. From this screen, you can create a new contact or edit an existing contact.



NAME	ORGANIZATION NAME	TITLE	PHONE	EMAIL	MAILING STATE	CONTACT ROLLUP ST...
Andrew Schulte	Test for SPP-MESA Instr...			andrew.schulte@icf.com		Active
Andrew Schulte	Test for SPP-MESA Instr...			andrew.r.schulte@gmail...		Active
John Smith	Test for SPP-MESA Instr...			john@xyz.com		Inactive

- If you are creating a new contact, click “New Contact” to bring up the page where you will enter data.
 - At a minimum, you will need to enter last name and email address.
 - Make sure that you select “Service & Product Providers Partnership” in the drop-down selection under “Contact Role in Program.” You will then be asked to define the Contact Role(s).
 - If you want this contact to be listed in the SPP Most Active List and Searchable SPP Directory, their contact role must be designated as “SPP Directory – Existing Commercial Buildings.”**

Contact Role in Program
In order to make sure this contact receives relevant information from ENERGY STAR, you must associate them with the appropriate program. If you need to associate them with more than one program, you can do so after saving this form. For more help, refer to https://www.energystar.gov/partner_resources/mesa.

* Select the program this contact should be added to:
 Service & Product Providers Partnership

* Role in ENERGY STAR Program
 Primary
 Communications
 Applicant
 Signatory

Role in Company
 Accounting/Finance
 Administrative
 Architect
 Communications/Marketing/PR

Energy-Related Professional Certificates
 Certified Energy Manager (CEM)
 Leadership in Energy and Environmental Design (LEED) Cer
 Professional Engineer (PE)
 Registered Architect (RA)

* Contact Status in Program
 Please Select...

* Role in ENERGY STAR Program

- Primary
- Communications
- Applicant
- Signatory
- SPP Directory- Existing Commercial Buildings
- SPP Directory- Industrial
- Other

- If you need to update existing contact details, select the appropriate record on the “Manage Contact Information” page. Click “Edit” in the top-right corner of the subsequent screen.

Contact
Andrew Schulte

+ Follow Edit

Contact Rollup Status: Active | Phone: | Email: andrew.schulte@icf.com

RELATED DETAILS

Role in Programs (1)

CONTACT NAME	PROGRAM	ROLE IN ENERGY S...	ROLE IN COMPANY	CONTACT STATUS ...
Andrew Schulte	Service & Product Pr...	Primary	SPP Directory- Exi...	Active

- Alternatively, from the full list of organizational contacts, you can click the down arrow to the right of the contact name and select “Edit Contact.”

My ENERGY STAR Account
Manage Contact Information

All Contacts (4) New Contact

NAME	ORGANIZATION NAME	TITLE	PHONE	EMAIL	MAILING STATE	CONTACT ROLLUP ST...
Andrew Schulte	Test for SPP MESA Instr...			andrew.schulte@icf.com		Active
Andrew Schulte	Test for SPP MESA Instr...			andrew.schulte@gmail...		Active
Jane Doe	Test for SPP MESA Instr...			jane.doe@abc.com		Inactive
John Smith	Test for SPP MESA Instr...			john@xyz.com		Inactive

Once the individual contact information is created/updated, go back to your MESA Home screen to update contact information associated with specific organizational activities.



My ENERGY STAR Account
Welcome, Andrew Schulte!
[Test for SPP MESA Instructions](#)

★ Programs (1)

PROGRAM NAME	BRANCH	ORG. RELATIONSHIP	STATUS
Service & Product Provid...	Commercial & Industrial	Partner ⓘ	Active

- Under “Program Name,” click on the link for “Service and Product Providers.”

★ Program
Service & Product Providers Partnership

Organization Test for SPP MESA Instructions	Branch Commercial & Industrial	Relationship Partner	Program Status Active
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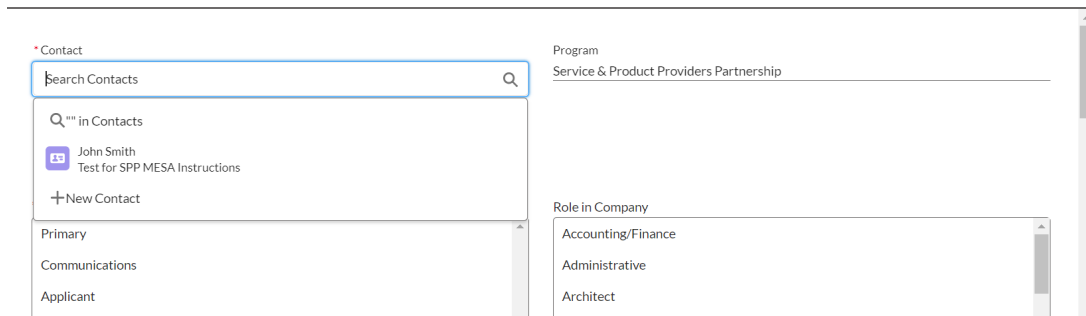
RELATED DETAILS

👤 Program Contacts (2) New

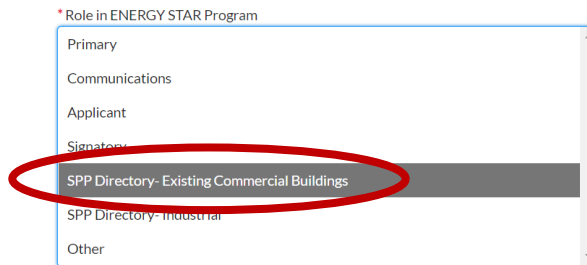
CONTACT NAME	ROLE IN ENERGY STAR P...	ROLE IN COMPANY	CONTACT STATUS IN PR...
Andrew Schulte	Communications ⓘ		Active
Andrew Schulte	Primary ⓘ; SPP Directory- Existing ... ⓘ		Active

- From the “Program” screen, find the section titled “Program Contacts.” If you have defined any contacts at the organizational level that have not yet been associated with your SPP Partnership, you will see a button that says “New.”
- To associate a new contact with your SPP Partnership, click the “New” button.
 - On the next screen, click in the “Contact” box and you will be prompted with a list of any Organizational contacts that you have not yet associated with your SPP Partnership. You can only associate contacts that have already been created under your organization.

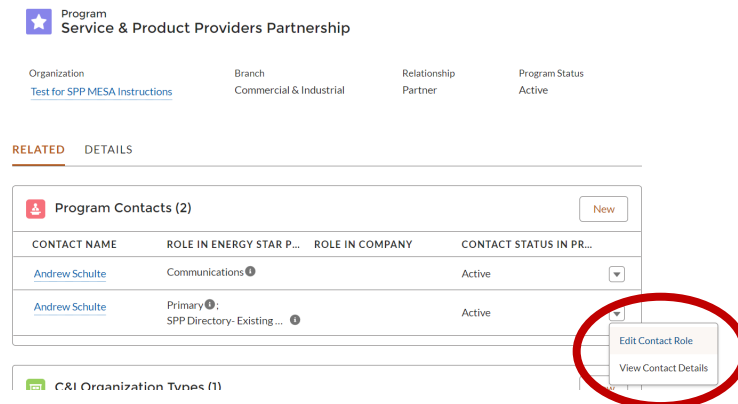
Create Contact Role



- Select the contact to associate with your SPP Partnership, then select one or more options for “Role in ENERGY STAR Program.” Ensure that their “Contact Status in Program” is set to “Active.”
- **If you want this contact to be listed in the SPP Most Active List and Searchable SPP Directory, they must be designated as the “SPP Directory – Existing Commercial Buildings.”**



- If you are editing/updating an existing contact, find their name in the “Program Contacts” list, click the down arrow to the right of the table, then select “Edit Contact Role.”



CONTACT NAME	ROLE IN ENERGY STAR P...	ROLE IN COMPANY	CONTACT STATUS IN PR...
Andrew Schulte	Communications		Active
Andrew Schulte	Primary SPP Directory- Existing...		Active

- From here, you can update their “Role in ENERGY STAR Program,” “Role in Company,” “Contact Status in Program,” and more. Click “Save” when finished.

Edit Contact Role

* Contact

Organization

* Role in ENERGY STAR Program

- Primary
- Communications
- Applicant
- Signatory
- SPP Directory- Existing Commercial Buildings

Program

Role in Company

- Accounting/Finance
- Administrative
- Architect
- Communications/Marketing/PR
- Energy Efficiency Program Management: Customer/Community

- If you want a contact to be listed in the SPP Most Active List and Searchable SPP Directory, they **must** be designated as the “SPP Directory – Existing Commercial Buildings.”
 - Only one program contact can be designated as the “SPP Directory – Existing Commercial Buildings.”
 - If you need to move this Contact Role from one contact to another, first edit the record for the “old” contact role to remove “SPP Directory – Existing Commercial Buildings.” Then go into the “new” Contact Role and ensure that “SPP Directory – Existing Commercial Buildings” has been selected.

2. “The contact included in the list of [Service Providers That Exchange Data with Portfolio Manager via Web Services](#) is incorrect. How do I update this?”


- Follow instructions above to use MESA to create or edit a contact at the organizational level
- Go back to the MESA Home screen and look for a section titled “C&I Recognition and Activities.”
 - If you are using the Portfolio Manager web services API, this section should already be displaying.
 - If this section is not available, you cannot add this activity via MESA. Please submit a [Helpdesk ticket](#) and request that the “Web Services Provider” activity be added to your organizational account.

My ENERGY STAR Account
 Welcome, Andrew Schulte!
[Test for SPP MESA Instructions](#)

★ Programs (1)			
PROGRAM NAME	BRANCH	ORG. RELATIONSHIP	STATUS
Service & Product Provider	Commercial & Industrial	Partner	Active


★ C&I Recognition and Activities (1)			
Activity	Branch	Org. Relationship	Status
Web Services Providers	Commercial & Industrial	Provider	Active

- Click on “Web Services Providers.”

 Program
Web Services Providers

Organization: [Test for SPP MESA Instructions](#) |
 Branch: Commercial & Industrial |
 Relationship: Provider |
 Program Status: Active

RELATED DETAILS

 Activity Contacts (1) New

Contact Name	Activity	Role in Activity
Andrew Schulte	Web Services Providers	Primary;Portfolio Manager Account C... ▼

- If you need to associate an existing organizational contact that has not yet been associated with this Activity, click “New” in the “Activity Contacts” box.

Create Contact Role

* Contact: Q

* C&I Recognition Activity: Web Services Providers ×

Contact Organization: _____ Contact Title: _____

* Role in Activity

- Primary ▶
- Primary Technical ▶
- Secondary Technical ◀

Role in Company

- Accounting/Finance ▶
- Administrative ▶
- Architect ◀

Cancel Save

- On the next screen, click in the “Contact” box and you will be prompted with a list of any Organizational contacts that you have not yet associated with your Web Services Provider Activity.
 - Select the Contact that you are associating with this Activity.
 - Select the appropriate “Role(s) in Activity.”
 - Make sure “Contact Status” is marked as Active. Save the record.
 - If you need to edit the Contact Role for an organizational contact that has already been associated with this activity, click the down arrow to the right of the name and select “Edit C&I Recognition and Activity Contacts.”

Program
Web Services Providers

Organization: [Test for SPP MESA Instructions](#) | Branch: Commercial & Industrial | Relationship: Provider | Program Status: Active

RELATED DETAILS

Activity Contacts (2)		New
Contact Name	Activity	Role
Andrew Schulte	Web Services Providers	View C&I Recognition and Activity Contacts
Jane Doe	Web Services Providers	Edit C&I Recognition and Activity Contacts

- On the subsequent screen, make any edits/updates to the Web Services Provider Contact Role.

Edit Web Services Providers Contact Role

*** Contact**

Activity: [Web Services Providers](#)

Contact Organization:
Contact Title:

*** Role in Activity**

Primary Technical

Secondary Technical

Primary Sales

Primary

Portfolio Manager Acc...

Website Contact

Role in Company

Accounting/Finance

Administrative

Architect

- You cannot edit basic contact information (name, email address) from here. You must do that at the organizational contact level, and it will flow down to the Web Service provider activity.

- Once all appropriate contact records have been created and associated with the “Web Services Provider” Activity, please submit a [Helpdesk ticket](#) and indicate which organizational contact should be listed as that the point of contact for the “Most Active Web Service Provider” list. The Helpdesk team will make this change on the back end, and you should see resolution within 1-2 days.

Adding or Updating C&I SPP Services Offered

To add a new SPP Services Offered

Step 1: Go to the Service & Product Providers Program page, in the C&I SPP Services Offered box and click the NEW button on the far right.

Step 2: Complete the information form for Services Offered – Please review carefully the selections available in the Levels lists.

Step 3: Click “Save.”

Step 4: Repeat steps 1-3 for each additional service your organization offers.

To update an existing SPP Service Offered

Step 1: In the C&I SPP Services Offered box, click the drop-down arrow to the right of a service.

Step 2: Select “Edit C&I SPP Services Offered.”

Step 3: Complete the information form for Services Offered – Please review carefully the selections available in the Levels lists.

Step 4: Click “Save.”

To delete an existing SPP Service Offered

Step 1: In the C&I SPP Services Offered box, click the drop-down arrow to the right of a service.

Step 2: Select “Delete C&I SPP Services Offered.”

Step 3: Click “Delete” when prompted to confirm.