HOW-TO GUIDE

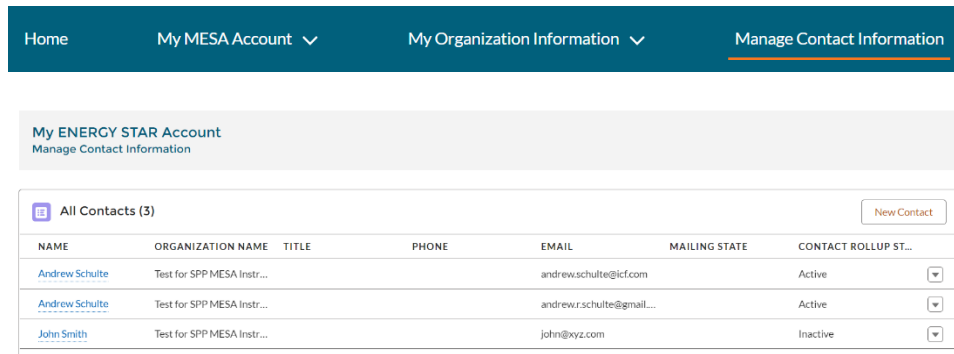# Supplemental My ENERGY STAR Account Guidance for Service and Product Providers

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?"**

   o 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.

- If you are <u>creating a new contact</u>, 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."**

* Role in ENERGY STAR Program

Primary

Communications

Applicant

Signatory

SPP Directory- Existing Commercial Buildings

SPP Directory- Industrial

Other

- ▪ If you need to <u>update existing contact details</u>, select the appropriate record on the "Manage Contact Information" page. Click "Edit" in the top-right corner of the subsequent screen.

- • 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."

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

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

- 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.

  o 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.
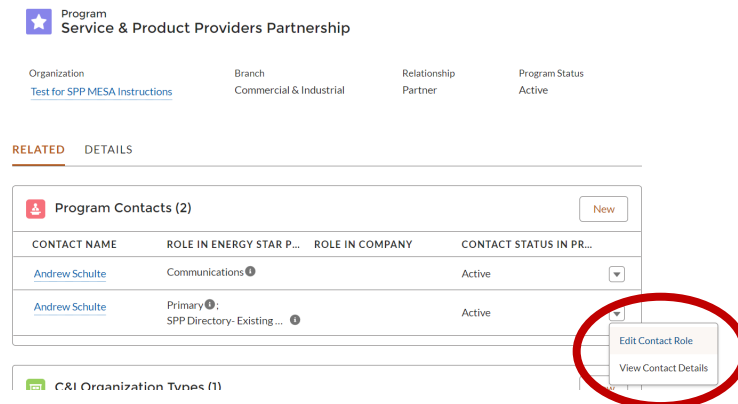
Create Contact Role

- 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."

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

United States
Environmental Protection
Agency

Edit Contact Role

* Contact
Andrew Schulte

Program
Service & Product Providers Partnership

Organization
Test for SPP MESA Instructions

* Role in ENERGY STAR Program

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

Role in Company

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

Cancel   Save

- o 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?"**

   - o Follow instructions above to use MESA to create or edit a contact at the organizational level

   - o 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	▾

United States
Environmental Protection
Agency

o Click on "Web Services Providers."

▪ 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.

• 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.

o Select the Contact that you are associating with this Activity.

o Select the appropriate "Role(s) in Activity."

o Make sure "Contact Status" is marked as Active. Save the record.

o 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."

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

- o 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.

United States
Environmental Protection
Agency

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.