



Existing Commercial Buildings Energy Performance Ordinance: How to Reshare a Meter in Portfolio Manager

How to Reshare a Meter in Portfolio Manager (you must complete all 9 steps to reshare your meters):

This will “kickstart” the sharing process for your meter(s) – PG&E runs the share process twice a day (around 10am and 4pm) so if you successfully posted pending share requests, you should expect an email shortly after those times with your results.

1) Click on property name from the My Portfolio tab.

Name	Energy Current Date	ENERGY STAR Score	Site EUI (kBtu/ft²)	Source EUI (kBtu/ft²)
Sample Facility 2705288				

2) Under “Sharing This Property”, for Company, Pacific Gas & Electric, select I want to “Remove Contact’s Access to Property” (see below)

3) Select Continue on the popup screen.

4) You should see a Green Bar at the top of our screen indicating that your property has been unshared.

For more information visit [SFEnvironment.org/ecb](https://sfenvironment.org/ecb) or email benchmark@sfenvironment.org

5) Now you need to share your property like it is a brand new share. You can click "Share this property again" from the Green bar (see above) , or follow the standard Sharing process flow (from the "My Portfolio" tab, select "I Want To" "Share with Others" next to the property. For step 3 when choosing permissions, select option 2 for Exchange Data. Click "Continue".

1 Select Properties

We'll get into the details of the level of access later. For now, which properties do you want to share and/or edit access to?

One Property

My Property

2 Select People (Accounts)

Which people (accounts) do you want to share these properties with (or modify their current access to)? The access for each can be different and you'll be able to specify that on the next page.

Select contacts from my contacts book:

Company, Pacific Gas and Elect
Henderson, Sherry
Poon, Vivian

To select multiple contacts, hold down your Control (CTRL) key and click on each selection. Only your **connected contacts** appear in this list.

3 Choose Permissions

If you only need to choose one permission (because you are doing a single share or you want to give the same permissions for all of your shares), you can choose that permission here. Otherwise, you may assign different permissions for different properties and/or contacts on the next screen.

I am doing a single share OR I want to choose the same permissions for all of my share requests.

I need to give different permissions for different share requests, and/or I need to give [Exchange Data](#) permissions.

Continue [Cancel](#)

6) Click the radio button under "Exchange Data"

Sort by: Property Name

None **Read Only Access** **Full Access** **Custom Access** **Exchange Data**

Name (ID)	None	Read Only Access	Full Access	Custom Access	Exchange Data
My Property (4138128)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pacific Gas and Electric Company	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

7) Pop up screen appears – the Service ID or meter ID may already be populated from a previous sharing request, and can be changed here if re-sharing because of a tenant change. Enter Property Owner Name, and set Read Only Access for Property. Set the Access Level to "Full Access" for all meters you want to share with PG&E.

In the ID Type field, input an "S" if sharing by Service ID number, or "M" if sharing by Meter number. Enter either the Service ID or Meter number in "Meter #" column.

For the "Share Forward" option, please select radio button for "No" (may need to scroll down to see this option).

Click "Apply Selections and Authorize Exchange" – pop up screen should close.

Select Exchange Data Access Permissions to [My Property](#) for [Pacific Gas and Electric Company](#).

[Pacific Gas and Electric Company](#) requires the following information in order to provide services to your property(ies). If you have any questions about how to complete this information, please contact [Pacific Gas and Electric Company](#).

Property Owner: Example: Jane Smith
Property Owner Name: 1 - 50 Characters

Please select the permission level you would like to grant [Pacific Gas and Electric Company](#) for [My Property](#) for each category. If "None" is selected for all items, [Pacific Gas and Electric Company](#) will not receive any access to this property.

Item	None	Read Only Access	Full Access	ID Type ¹	Meter # ²
Property Information	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>		
▼ All Meter Information					
My Elec Meter	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="text" value="s"/>	<input type="text" value="1234567890"/>
Goals, Improvements, & Checklists	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		

Apply Selections & Authorize Exchange [Cancel](#)

Additional Options:

Please indicate whether or not Pacific Gas and Electric Company can share this property with others.

Item	Yes	No
Share Forward Allow Pacific Gas and Electric Company to share this property with others and give them any permissions that he/she has, including the right to share with more people.	<input type="radio"/>	<input checked="" type="radio"/>

Apply Selections & Authorize Exchange [Cancel](#)

8) Hit big "Share Properties" button.

Name (ID)	None	Read Only Access	Full Access	Custom Access	Exchange Data
▼ My Property (4138128)					
Pacific Gas and Electric Company	<input type="radio"/>				<input checked="" type="radio"/> Edit

Share Property(ies) [Cancel](#)

9) You should see a green bar indicating property/meters have been shared. Also, you should see a record in your Notifications section for each meter that has been shared. If there are no records there, there is no pending meter share for PG&E.

You have successfully shared/edited access to your property(ies). If you shared properties, you will receive a notification when your contact has accepted the share. If you edited access to current permissions, the edits have been made, no acceptance is required.

My Shared Properties (8)

Share (or Edit Access to) a Property

Download Sharing Report

Sharing Notifications (7) [View All](#)

My Elec Meter - Sharing request sent to Pacific Gas and Electric Company	Cancel Clear
My Property - Sharing request sent to Pacific Gas and Electric Company	Cancel Clear

Within 24 hours you will receive an email with the results of your share.

Information: SFEnvironment.org/ecb • benchmark@sfenvironment.org • (415) 355-3750