

How-to: Upload/Update Multiple Properties to Portfolio Manager

In order to help you with the administrative burden of uploading data to Energy Star Portfolio Manager (ESPM), BOMA Toronto has put together a guide for you. Energy Star has made it simple for users to not only add facilities to their portfolio, but also to update the data that is being reported.

Steps:

- Log-in and click the **“MyPortfolio”** tab at the top of the page.
- Scroll down and on the left side you will see the **“Manage Portfolio”** box
- Click the link **“Upload and/or update multiple properties”**

Upload Multiple Properties:

- Where it says **“Add new properties to my account”**, download the spreadsheet and fill it out.
The spreadsheet is also attached to this email and at <https://www.bomavault.com/readings>
- Navigate back to the same page and upload the spreadsheet in the **“Upload Spreadsheet”** section. Choose **“Add New Properties”** in the drop-down menu and click the upload button.

Update Property Data (Bills, Consumption, etc.)

- Where it says **“Edit/Upload my existing properties”**, create the **“create a custom template”** link and you will be redirected to another page.
- In Step 1, click the **“Add Bills to Existing Meters (i.e., meter consumption information)”** checkbox.
- In Step 2, select **“Multiple Properties”** from the drop-down menu.
- Select all the properties that you want to update and click the **“Create and Download Template”** button.
- Fill out the template with all of the utility information and navigate back to the **“Upload Spreadsheets”** page where you can upload the data.