ONBOARDING CHECKLIST

Getting Started with EnergyPrint

We make utility tracking easy. Quick onboarding and dedicated support means less time until you're capturing utility data.



Onboarding Your Buildings



Step 1: Sign Up

- Create an account online
- Assign your data champions
- Invite unlimited additional users



Step 2: Add Buildings

- Enter basic information about your buildings & utility accounts
- Provide a recent utility bill & signed LOAs
- Enroll in online account access



Step 3: Go Live!

- Schedule training with your dedicated CSM to unleash the power of the dashboard
- Take a look at building history & trends
- Connect your ENERGY STAR accounts.

Partnering with EnergyPrint is easy. We take the work out of utility tracking so you can quickly make educated and actionable decisions for your business.

Need support? Contact us by phone, email, or chat for a quick resolution.





Onboarding Process



Step 1: Sign Up

- Create your online account and assign dashboard users.
- Establish primary and property contacts.
- Review deliverables with your dedicated CSM, set a project communication schedule, and arrange invoice payment.



Step 2: Add Buildings

- Enter building and utility information including addresses, sq. ft., utility account information, and meter details.
- Sign LOAs and enroll in your chosen level of access (Online, Delegate, or Customer Request). Online Access is the easiest and preferred status for getting your data fast. We can walk you through the process if you need help.
- Provide a single bill copy for each account you wish to enroll
 with us. We use this bill copy to verify service addresses,
 account details, and confirm the information you submitted is
 accurate and we can engage with the utility on your behalf.
- Have a large portfolio of buildings to import? Ask about our bulk upload process.



Step 3: Go Live!

- Login and visit the onboarding tab to track progress.
- Start monitoring and analyzing your utility data in the dashboard. Request additional training as needed.
- Start tracking and proving ROI on your energy improvements!



Need help getting started? We're here to help. Our support is available by phone, email, or chat. **Sign up today!**



