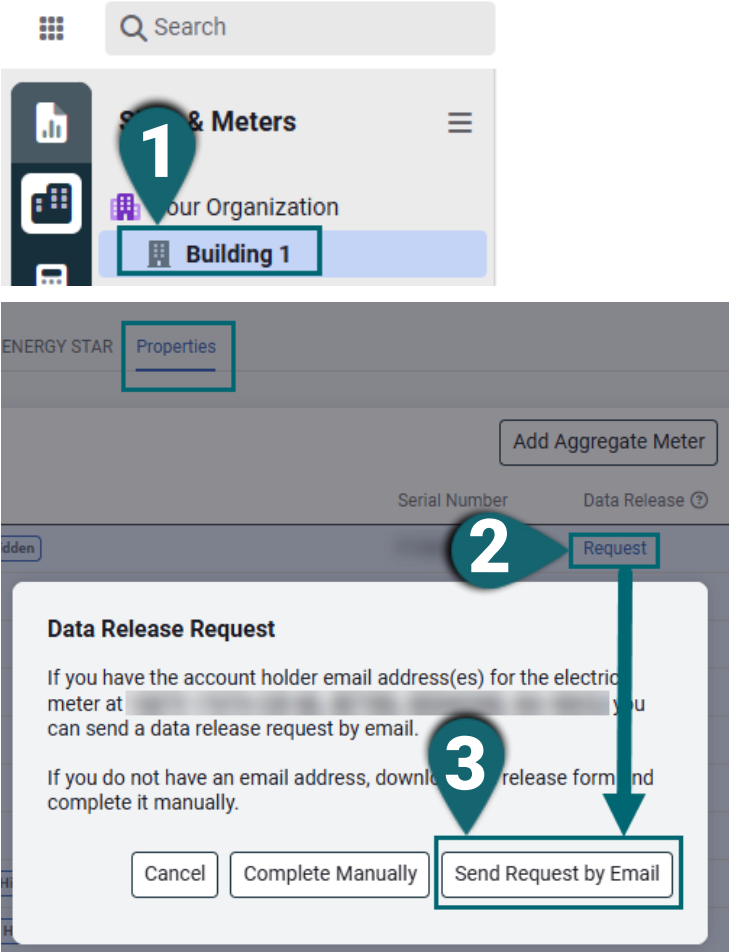


EnergyCAP: Complete a data release

Purpose	By the end of this job aid, you will be able to complete a data release in EnergyCAP via email or manually.
Before you begin	You will need either: the email of the person who has the PSE bill or a completed data release form and a copy of the PSE bill.

Complete a data release via email

 <p>The screenshot shows the EnergyCAP interface. In the top left, there is a search bar and a sidebar with icons. A red circle with the number '1' highlights the 'Properties' tab in the sidebar. Below this, a red circle with the number '2' highlights the 'Request' button in the 'Data Release' column. A red circle with the number '3' highlights the 'Send Request by Email' button in the 'Data Release Request' dialog box.</p>	<ol style="list-style-type: none"> 1 Click the site and click the Properties tab. 2 Click the Request button under the Data Release column for the meter of your choice. 3 Click the Send Request by Email button.
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Send Data Release Request

Reply-to

youremail@email.com

Emails are sent from EnergyCAP (no-reply@energycap.com)

Recipients is required

⚠ Emails, comma separated

4

Subject

PSE Data Release Request from Your Name

Message

Paragraph

B *I* U [Link](#)

Hello,

Please view and complete the data release form for your PSE account for **PSE Service Address** by clicking the button below.

5

p

Build with [tinyMCE](#)

Cancel

Send

6

4 Input the Recipient's email address.

5

Add any personalization to the message that you would like.

6

Click **Send**.

Meters - 158

Add Aggregate Meter

Add Meters

Meter

Serial Number

Data Release ⓘ

View Details Hidden	123456789	Pending	Actions ▼
View Details Hidden	123456789	Request	Actions ▼
View Details	123456789	Active	Actions ▼

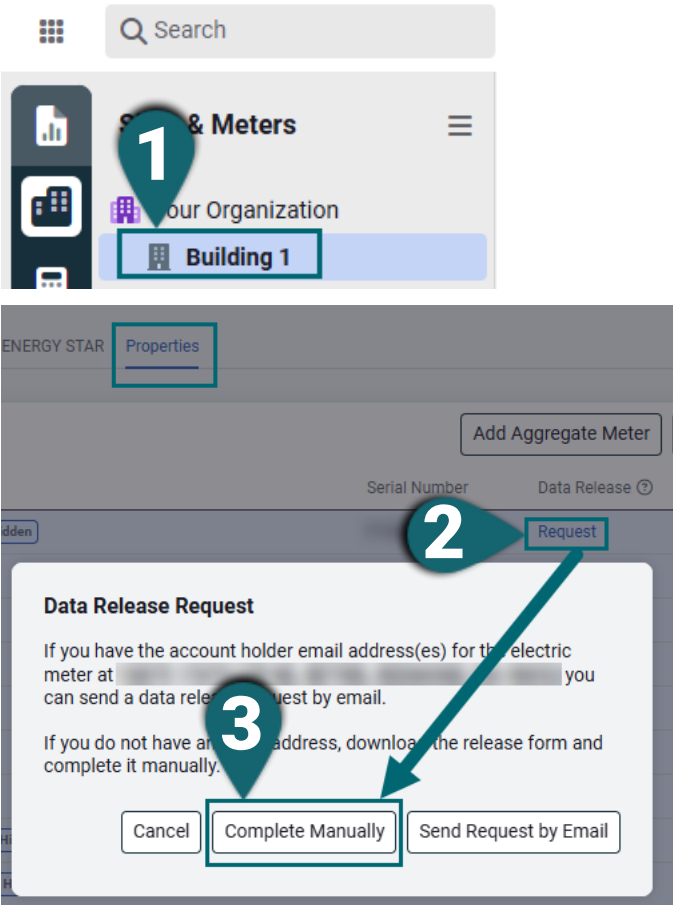
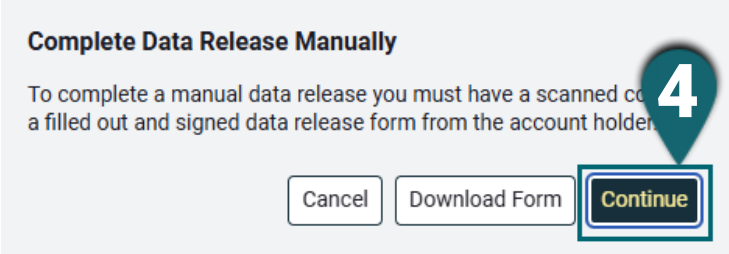
7

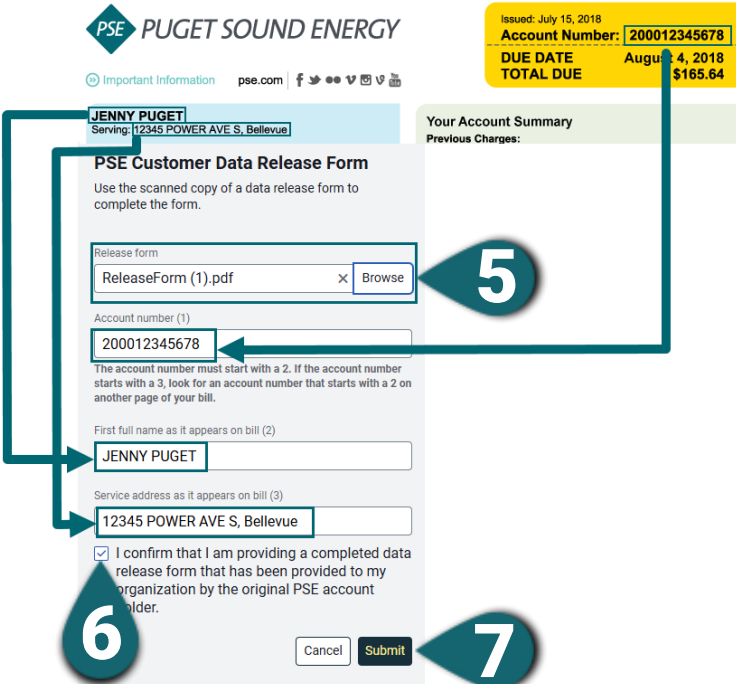
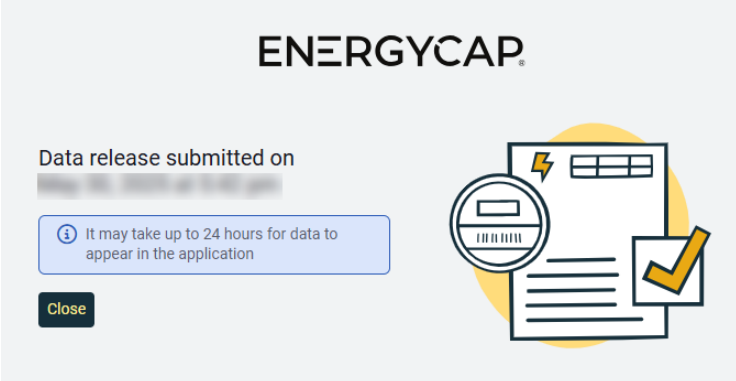
RESULT

Data release status:

Pending—waiting for a response from the tenant. You can send multiple requests only the most recent request contains a valid link.

Active—a data release form is approved and uploaded.

Complete a data release manually		
	1	Click the site and click the Properties tab.
	2	Click the Request button under the Data Release column for the meter of your choice.
	3	Click the Complete Manually button.
	4	Click the Continue button.
		Note: To download the blank release form, click Download Form .

 <p>The screenshot shows the PSE Customer Data Release Form. At the top right, a yellow box displays account information: Issued: July 15, 2018, Account Number: 200012345678, DUE DATE: August 4, 2018, and TOTAL DUE: \$165.64. The form header identifies the customer as JENNY PUGET, serving at 12345 POWER AVE S, Bellevue. The form title is 'PSE Customer Data Release Form' with instructions to use a scanned copy. A 'Release form' section has a text box containing 'ReleaseForm (1).pdf' and a 'Browse' button, with callout 5 pointing to it. The 'Account number (1)' field contains '200012345678', with callout 6 pointing to it. The 'First full name as it appears on bill (2)' field contains 'JENNY PUGET'. The 'Service address as it appears on bill (3)' field contains '12345 POWER AVE S, Bellevue'. A confirmation checkbox is checked, with callout 7 pointing to the 'Submit' button at the bottom right.</p>	<p>5</p> <p>Attach the release form, and input the account number, full name and service address exactly as it appears on the bill.</p> <p>6</p> <p>Check the confirmation checkbox.</p> <p>7</p> <p>Click Submit.</p>
 <p>The screenshot shows a confirmation message from EnergyCAP. It says 'Data release submitted on' followed by a blurred timestamp. Below this is an information icon and a message: 'It may take up to 24 hours for data to appear in the application'. A 'Close' button is at the bottom left. On the right is an illustration of a document with a lightning bolt icon and a checkmark.</p>	<p>8</p> <p>RESULT</p> <p>Data release status:</p> <p>Active—a data release form is approved and uploaded.</p>