

# SDG&E® Business Energy Advisor

## User Guide

# Table of Contents

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<b>What is SDG&amp;E Business Energy Advisor?</b>	<b>Page 3</b>
<b>Accessing SDG&amp;E® Business Energy Advisor</b>	<b>Page 4</b>
<b>Welcome Initial Business Profile Management</b>	<b>Page 7</b>
<b>Landing Page – The First Thing You See</b>	<b>Page 9</b>
<b>Landing Page –Ways to Save Toolbar</b>	<b>Page 10</b>
<b>Section 1: My Energy</b>	<b>Page 11</b>
<b>My Energy Main Page</b>	<b>Page 12</b>
<b>How You Compare</b>	<b>Page 13</b>
<b>Costs, Electricity, and Gas – Basic Functionality</b>	<b>Page 14</b>
<b>Costs – My Energy Bills</b>	<b>Page 15</b>
<b>Costs – Account Chart Control</b>	<b>Page 16</b>
<b>Costs – Meter Chart Control</b>	<b>Page 17</b>
<b>Costs – Groups Chart Control</b>	<b>Page 18</b>
<b>Electricity</b>	<b>Page 19</b>
<b>Gas</b>	<b>Page 20</b>
<b>Energy Use Analysis</b>	<b>Page 21</b>
<b>Compare Bills</b>	<b>Page 22</b>
<b>Advanced Charting Tools</b>	<b>Page 23</b>
<b>My Energy – Additional Features</b>	<b>Page 26</b>

<b>Section 2: Ways to Save</b>	<b>Page 28</b>
Ways to Save Main Page	Page 29
Ways to Save - Recommendations	Page 30
Ways to Save – My Plan and History	Page 31
Offers	Page 32
<b>Section 3: How am I Compared</b>	<b>Page 33</b>
How am I Compared Main Page	Page 34
How am I Compared Categories	Page 35
Ongoing Business Account Management	Page 36
Linking Accounts	Page 38
<b>Section 4: Energy Report</b>	<b>Page 40</b>
Energy Report Main Page	Page 41
Example Report	Page 42
<b>Section 5: Contact Us</b>	<b>Page 43</b>
Contact Us Main Page	Page 44

## What is SDG&E Business Energy Advisor?

A robust online energy analysis tool that allows business customers to analyze energy use, study consumption allocation throughout a building, compare use against similar businesses, and discover targeted energy savings.

The tool is divided into five sections: **My Energy**, **Ways to Save**, **Offers**, **Profile**, and **Energy Reports**.

### **My Energy**

Analyze your historical usage and costs for a single meter, billing account, or select group of meters/accounts.

Sub-Sections\*: How You Compare, Costs, Electricity, Gas, Energy Use Analysis, Compare Bills.

\*Energy Use Analysis and Compare Bills only appears if you have over a year of data available.

### **Ways to Save**

Receive targeted energy savings recommendations, including utility-offered rebates.

### **Your Business's Energy Score**

Discover the latest program offers including Critical Peak Pricing.

### **How am I Compared**

Provide building characteristics to create building profiles and optimize analytics.

### **Energy Reports**

Download or print a summary report for presentation or reporting.

# ACCESSING SDG&E BUSINESS ENERGY ADVISOR

## SDG&E WEBSITE

This section explains how to access the SDG&E Business Energy Advisor from sdge.com.

The SDG&E Business Energy Advisor page on sdge.com allows customers to determine if the Business Energy Advisor is a good fit for their business. This page also provides access to “Welcome to SDG&E Business Energy Advisor” where you can log in or register.

Payment Options

Tools for Energy Management

- My Account
- My Energy Tool
- Green Button
- kWickview
- Energy Waves
- SDG&E Business Energy Advisor**

+ Pricing Plans

+ Ways to Save

+ Services

+ For Trade Professionals

### Business Energy Advisor Tool

An Energy Analysis Tool for the Medium Business Customer.

Analyze Energy. Empower Action.

This tool aims to enhance the [online self-service experience](#) of our customer by giving them sound data which, in turn, allows them to make informed business decisions.

To be considered eligible for this tool, a **customer must meet one** of the following two criterion:

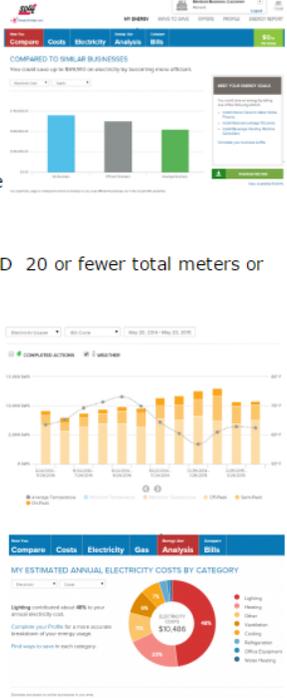
1. At least 1 active nonresidential meter with demand  $\geq 20$ kW for the last 12 months AND 10 or fewer total meters or service points (across all their accounts).
2. At least 1 active nonresidential meter on a demand-billed rate\* AND 20 or fewer total meters or service points (across all their accounts).

Here are just a few of the many benefits customers will gain from using the [Business Energy Advisor Tool](#):

- Analyze smart meter consumption data
- Analyze billed charges & credits
- Group accounts and/or meters together for collective analysis
- Better understand complex rates with various consumption and demand components\*\*
- Track energy efficiency initiatives and assess their effectiveness
- Provide building details to perform disaggregated load analysis
- Download high-level reports and export billing & consumption details

[Enroll Now](#)

\*\*SDG&E Business Energy Advisor tool fully supports complex commercial billing rates including Cogeneration and Net Metering.



The image shows two screenshots of the Business Energy Advisor tool. The top screenshot displays a 'COMPARED TO SIMILAR BUSINESSES' section with a bar chart comparing energy costs across different categories. The bottom screenshot shows 'MY ESTIMATED ANNUAL ELECTRICITY COSTS BY CATEGORY' with a pie chart and a total cost of \$10,400. The pie chart includes categories like Lighting, Cooling, and Heating.

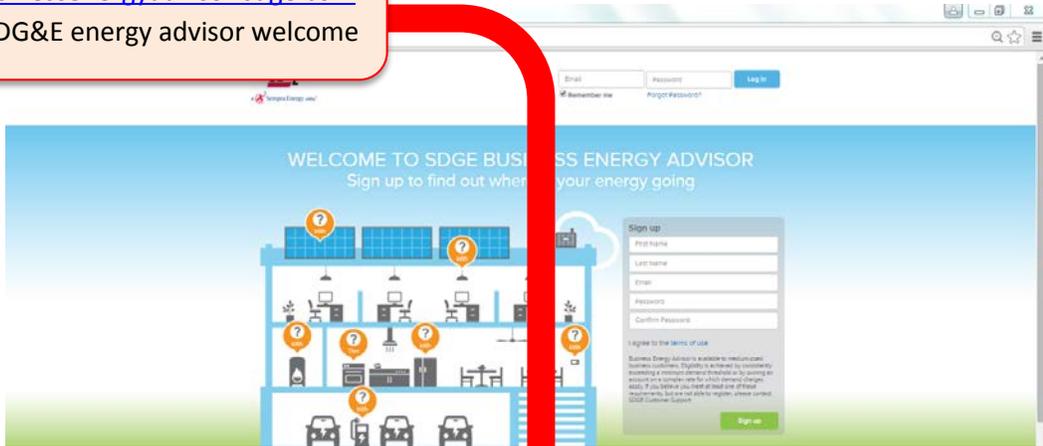
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# ACCESSING SDG&E BUSINESS ENERGY ADVISOR

## WELCOME TO SDG&E BUSINESS ENERGY ADVISOR

This section details how to access SDG&E Business Energy Advisor.

Go to URL  
<http://businessenergyadvisor.sdge.com>  
and the SDG&E energy advisor welcome



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**Returning user login**

**New user sign up**

**Tool Overview**

**ANALYZE YOUR ENERGY USAGE**  
and find simple tips that can help you save money on your bill

Analyze Energy	Save Energy & Money	Create an Energy Plan	Report
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# ACCESSING SDG&E BUSINESS ENERGY ADVISOR

## NEW COMMERCIAL CUSTOMER SIGN UP

This section details how to **register for the first time** to access the Business Energy Advisor.

*Note: A customer is eligible for registration if they meet at least one of the following two criterions:*

- 1) At least 1 active nonresidential meter with demand  $\geq 20$ kW for the last 12 months **AND** 20 or fewer total meters (across all accounts).
- 2) At least 1 active nonresidential meter on a demand-billing rate **AND** 20 or fewer total meters (across all accounts).



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1

Locate the Sign up box on the Welcome Page and populate the required fields.

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2

Click Sign up to agree to the terms of use and proceed to account verification with an account number and related zip code.

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3

Clicking Sign Up on the account verification page will prompt you to fill out an initial business profile before logging into the Business Energy Advisor.

Click Sign up again to complete the process or click back to return to the Sign up box.

# WELCOME INITIAL BUSINESS PROFILE MANAGEMENT

## TELL US A LITTLE ABOUT YOUR BUSINESS

**WHAT:** When you log in to the Business Energy Advisor for *the first time after registering*, a “Welcome – Tell us a little about your business” window pops. You are prompted to complete two pages of questions to create a business profile that will be associated with the account you inputted when first signing up.

The first question asks you to select industry type then click next to proceed.

Business Energy Advisor associates a business profile with a particular account. The first time you log in, Business Energy Advisor references the account used to register.

The second question page that pops up after you complete the first page displays the account number and address associated with the business profile. It also prompts you to name the business profile, select a business type from the dropdown menu, and enter approximate square footage for their business. *This initial data is needed to populate the How You Compare Section of My Energy.*

You must select “See How You Compare” to proceed to the SDGE Business Energy Advisor.

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**WHY:** Business Energy Advisor requires a basic understanding of your business in order to enable various benchmarking and end use analysis capabilities.

# ACCESSING SDG&E BUSINESS ENERGY ADVISOR

## RETURNING USER

This section details how a returning user that has already registered for the tool accesses the Business Energy Advisor after previously registering.



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Returning users can log in with the email and password they used when they first signed up.



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# LANDING PAGE – THE FIRST THING YOU SEE

**WHAT:** This section allows you to see your regional business energy score.

**HOW:** The tool uses the building type; square footage and climate zone (based on address) to identify your peers for comparison. The more information you input into the Business Profile the more customized the comparisons will be. You can start by updating the “How Am I Compared” section.

**Navigate between the five main sections of the tool. This feature appears across all sections.**

**After clicking “Take a Tour,” hover over the orange dots that appear to learn more about each section. Take a Tour appears across all sections.**

**The account you select in this view determines the insights across all sections** Exceptions: My Energy - Costs, Electricity, and Gas - which are comprehensive.

**Note: Gas will only appear if the account has a gas meter, and Energy Use Analysis and Compare Bills will only appear if the account has over a year of data.**

**Takes you to the SDG&E home page. This feature is available across all sections.**

**The Tell Us About Your Business shortcut relates to the business profile.**

**6** SDGE logo

**2** Welcome | Log out | Take an account

**1** TOUR | LOGIN

**3** MY ENERGY | WAYS TO SAVE | OFFERS | PROFILE | ENERGY REPORT

**4** Compare | Costs | Electricity | Gas | Energy Use Analysis | Compare Bills | \$0/yr Plan Savings

**YOUR BUSINESS'S ENERGY SCORE**

**YOUR Regional Score**

Annual Score | Monthly Breakdown

1 represents an inefficient business | 100 represents an efficient business

**35**

Your electricity usage is compared to similar businesses in your region.

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**5** TELLS US ABOUT YOUR BUSINESS

**CREATE AN ENERGY PLAN**

Select energy saving actions below to add to your energy savings plan.

All Categories	Cost	Savings	Payback Period	Status
Install VFD for Pumps and Motors	\$4,852	\$2,737/yr	12 months	Add to plan Already Complete Not Applicable
Install Beverage Vending Machine Controllers	\$216	\$185/yr	7 months	Add to plan Already Complete Not Applicable
Install Reduced-wattage TB Lamps	\$7	\$9/yr	6 months	Add to plan Already Complete Not Applicable

Get more energy saving recommendations

Your profile is 7% complete

View your business profile

CONTACT US | TERMS AND CONDITIONS | PRIVACY POLICY

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# LANDING PAGE – WAYS TO SAVE TOOLBAR

The Ways to Save toolbar helps navigate between My Energy and Ways to Save. This toolbar is available below each chart in the My Energy section if you **scroll down**.

This shortcut helps populate the Business Profiles that can be managed in more detail through the Profile Section or dropdown menu.

1

2

3

TELL US ABOUT YOUR BUSINESS

CREATE AN ENERGY PLAN

What is the thermostat setting (degrees F) during summer non-work hours?

example: 88

Are your walls insulated?

Please select one

What is the thermostat setting (degrees F) during winter non-work hours?

example: 65

Next

Your profile is 8% complete

View your business profile

CONTACT US | TERMS AND CONDITIONS | PRIVACY POLICY

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Energy Savings Recommendations

Click on a recommendation to open the corresponding Ways to Save recommendation details page.

**NOTE:** The \$ estimates in box 2 and 4 are measured per x number of units. Update the recommendation details page as applicable to your business to calculate personalized savings and costs.

WAYS TO SAVE

\$0<sub>yr</sub> Plan Savings

Install Reduced-wattage T8 Lamps

Replace 32 watt 4 ft T8 fluorescent tubes with 25 or 28 watt T8 linear fluorescents.

Add this to your plan

Add to plan

Already Complete

Not Applicable

4

Answer these questions for more accurate saving estimates.

How many 32 watt 4 foot lamps will you be replacing?

example: 3

Are you replacing these lamps with 25 or 28 watt lamps?

Please select one

Calculate

Calculated Savings & Costs

Estimated Yearly Savings \$9

Estimated Cost \$7

Estimated Payback Period 6 months

Other Yearly Savings Estimates 75 kWh Electricity

How does this save money?

Linear fluorescent tube lamps are the most common lighting fixtures in office buildings.

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Calculated Savings and Costs – when the initiative is added to the plan the calculated savings populate the green “plan savings tracker” that appears across all sections.

Section 1

# My Energy

**MY  
ENERGY**

WAYS TO  
SAVE

OFFERS

HOW AM I  
COMPARED

ENERGY  
REPORT

CONTACT  
US

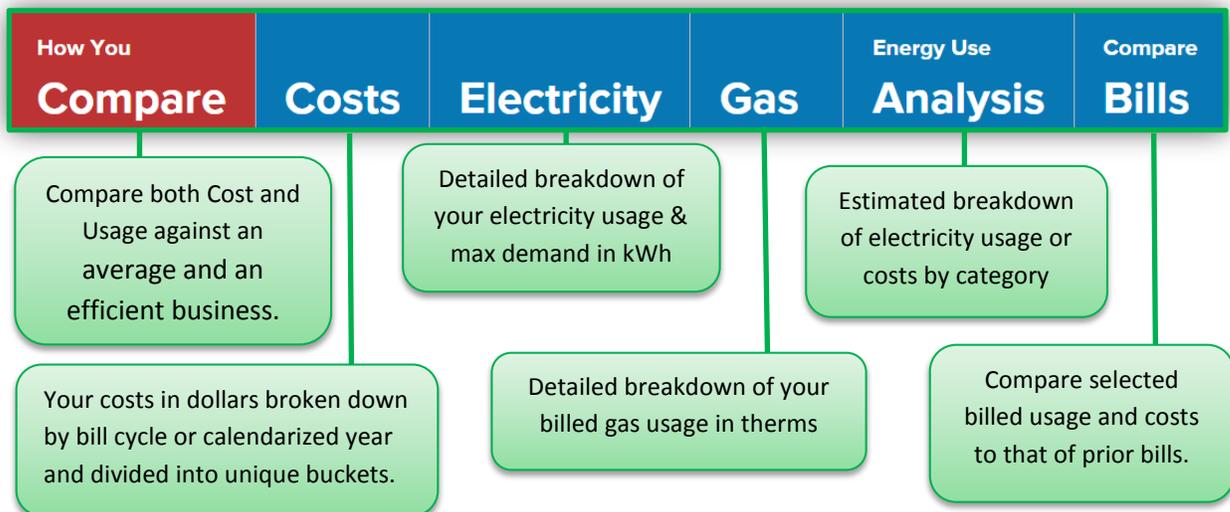
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# My Energy

The “My Energy” section of Business Energy Advisor is the default view upon login. In this section, you can compare businesses, view consumption, cost, analyze energy, and compare bills.

- |                              |  |
|------------------------------|--|
| 1 Top Level Navigation       | 4 Energy Goals – Call to Action                |
| 2 My Energy Navigation       | 5 Logout / Ongoing Business Profile Management |
| 3 Energy Score (see page 13) | 6 Take a Tour                                  |

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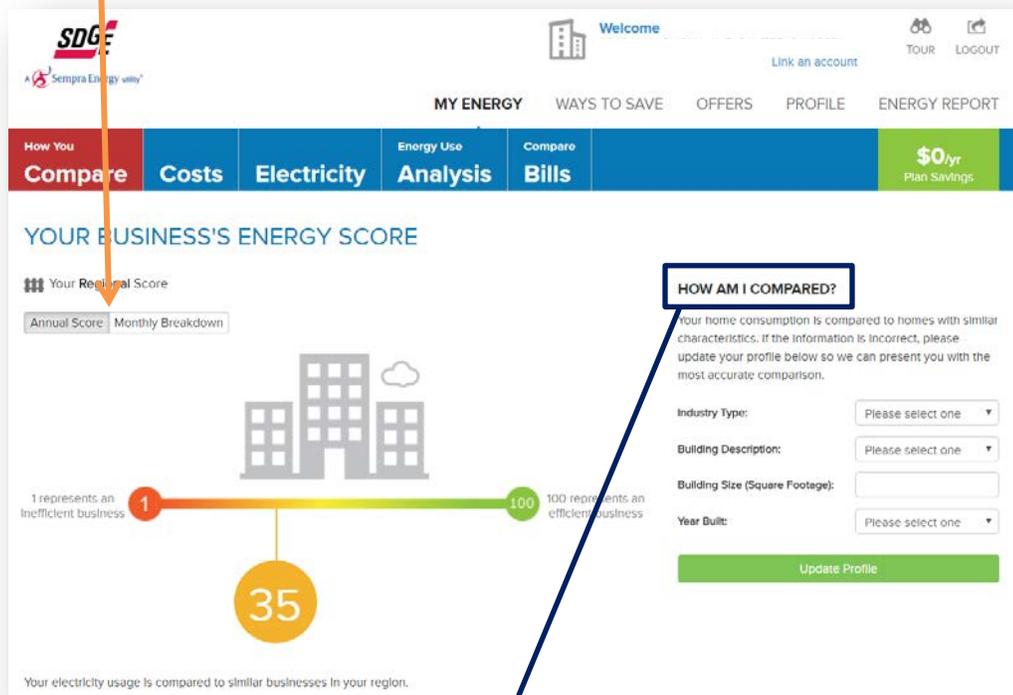
# HOW YOU COMPARE

## COMPARED TO SIMILAR BUSINESSES BASED ON YOUR BUSINESS PROFILE

**WHAT:** This section allows you to see your regional business energy score.

**HOW:** The tool uses the building type; square footage and climate zone (based on address) to identify your peers for comparison. The more information you input into the Business Profile the more customized the comparisons will be. You can start by updating the “How Am I Compared” section.

You can toggle between your comparison score and your monthly breakdown comparisons.



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Your business is compared with an average business and efficient business using the CEUS\* benchmarking data.

\*CEUS – California Commercial End-Use Survey

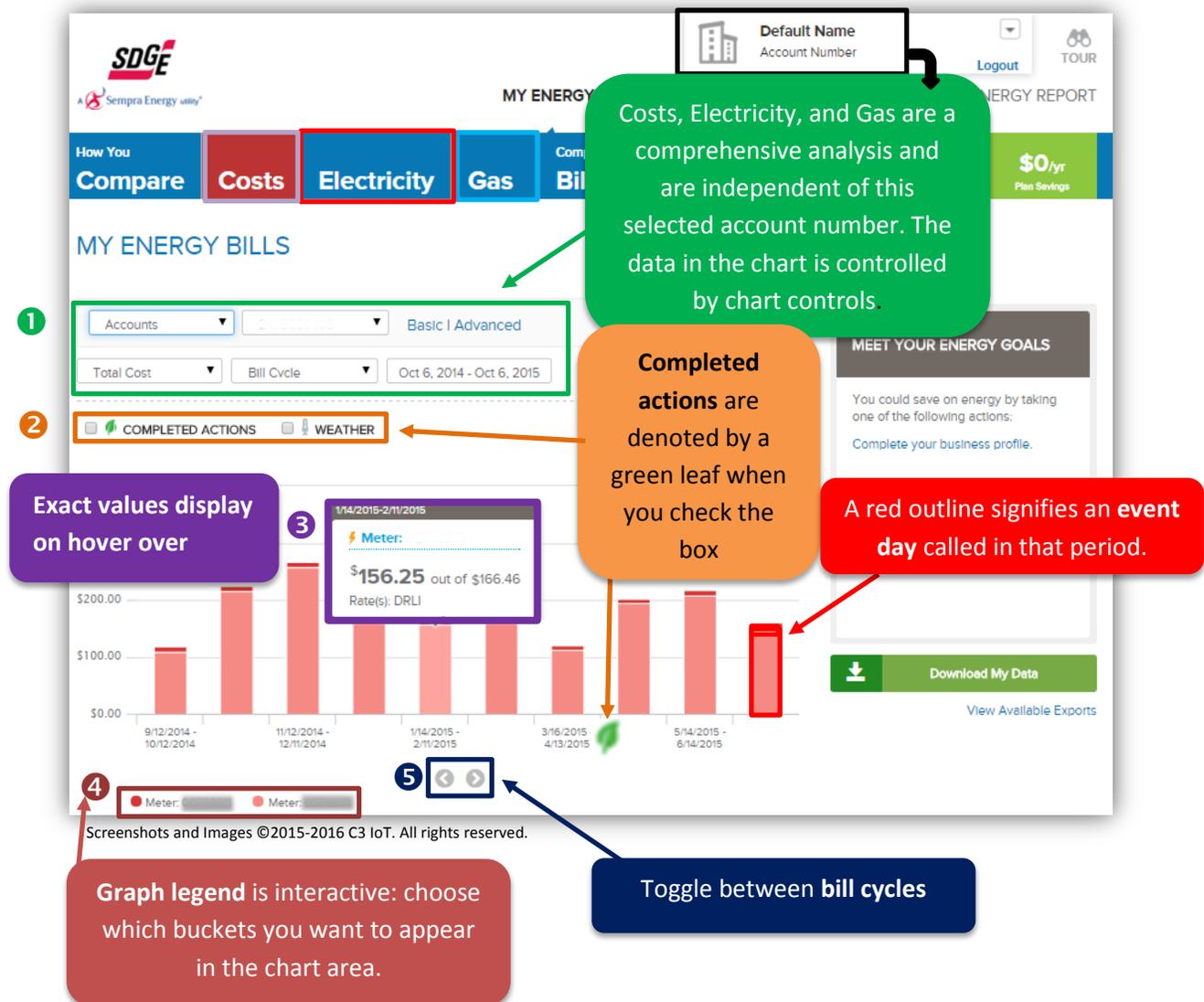
# COSTS, ELECTRICITY, AND GAS

## BASIC FUNCTIONALITY

**COSTS:** Shows the your costs in dollars broken down by bill cycle or calendarized year and divided into specific buckets based on charges or meters as dictated by the chart selection. This chart allows you to better understand your bill details.

**ELECTRICITY:** This section shows a detailed breakdown of your electricity usage and max demand in kWh and kW respectively. You can view the data in quarter-hour, hour, day, bill cycle, month, and annual time grains where the data is then divided into unique buckets based on charges or meters as dictated by the chart selection. All time grains besides bill cycle are derived from smart meter data. This chart allows you to better understand your electricity consumption and demand over time.

**GAS:** This section shows a detailed breakdown of your billed gas usage in therms. You can view the data in month, bill cycle, or custom time grains where the data is then divided into unique buckets based on charges or meters as dictated by the chart selection. All time grains besides bill cycle are derived from smart meter data. This chart allows you to better understand your gas consumption over time.



# COSTS

## MY ENERGY BILLS

**WHAT:** This tool shows your costs in dollars. The key feature is **chart controls** that displays the details of total, gas, or electricity costs that are broken down into applicable buckets.

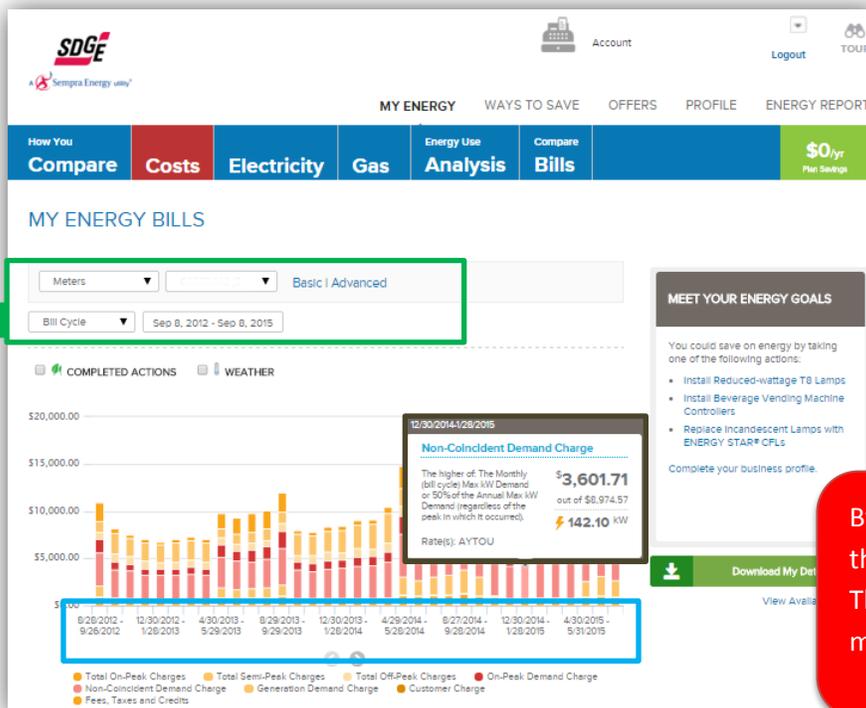
**HOW:** If **Accounts** is selected, the data can be displayed by calendarized year or bill cycle. You have the option to select total, gas, or electric costs. The interactive chart legend\* is broken down by individual meter and other charges as applicable.

If **Meters** is selected, the data can be displayed by calendarized year or bill cycle. The meter number dropdown shows if the meter is a gas or electric meter. The interactive chart legend\* is broken down by seasonal, demand, or other charges as applicable.

If **Groups** is selected, the data can be displayed by year or month. The data is generated by the Advanced Charting Tools. Groups are a display of selected accounts and meters that you builds through the Advanced Charting Tools.

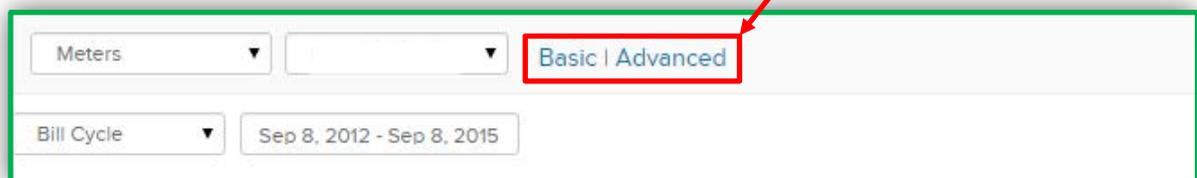
\*The interactive chart legend is color coordinated to match the chart display. Charge descriptions, exact values, rate type, and additional details are available on the **hover over** as applicable for all the buckets listed.

**WHY:** This chart allows you to better understand your bill details.



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By clicking "Advanced" you open the Advanced Charting Tools. This tool allows you to aggregate meter consumption and costs.



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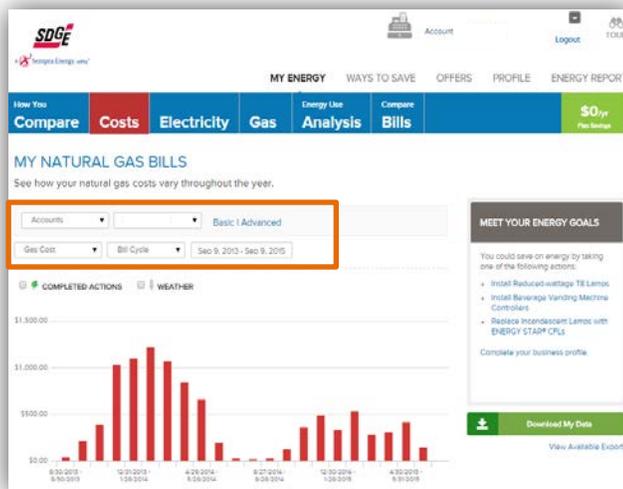
# COSTS – ACCOUNT CHART CONTROL

## MY ENERGY – COSTS – ACCOUNTS

When **Accounts** is selected in the first dropdown of the Chart Control panel, you can navigate between accounts to view total, electricity, or gas cost in either a calendarized year\* or bill cycle interval.

The **Calendar** tool allows you to refine the data to a specific time grain within the bill cycle or yearly interval.

\*the year interval is only available if you have more than one year of data.



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Account Chart Control

- Accounts
- Accounts
- Meters
- Groups

Account Dropdown only appears for customers with more than one account.

Advanced Charting Tools.

Accounts [dropdown] [dropdown] Basic | Advanced

Total Cost [dropdown] Bill Cycle [dropdown] Sep 8, 2012 - Sep 8, 2015

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- Total Cost
- Total Cost
- Electricity Cost
- Gas Cost

- Bill Cycle
- Yearly
- Bill Cycle



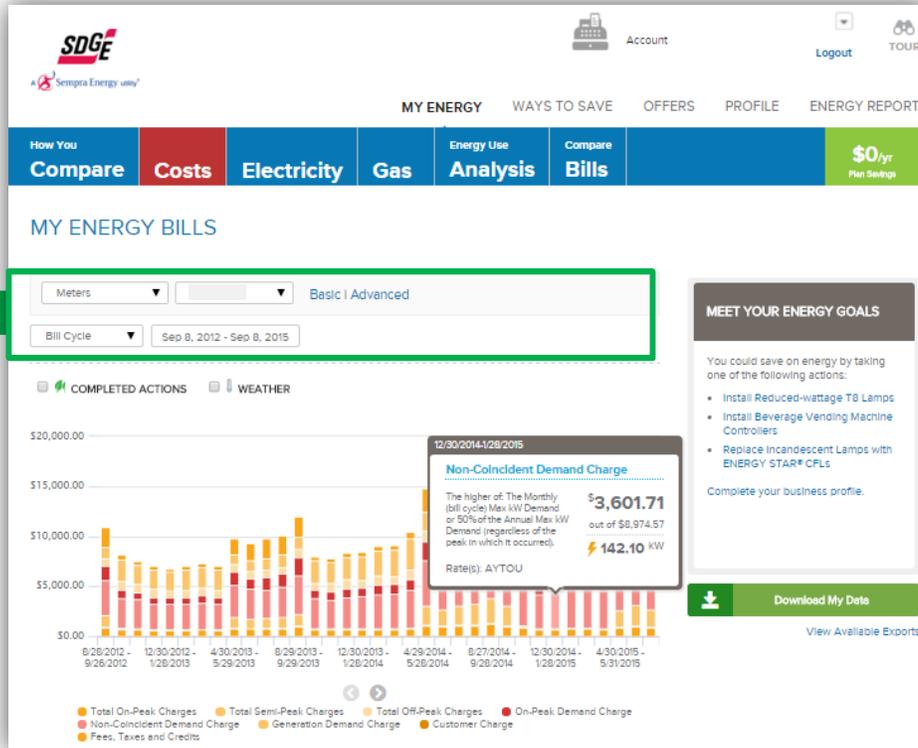
# COSTS – METERS CHART CONTROL

## MY ENERGY – COSTS – METERS

When **Meters** is selected in the first dropdown of the Chart Control panel, you can navigate select specific meters to analyze in either a calendarized year\* or bill cycle interval.

The **Calendar** tool allows you to refine the data to a specific time interval within the bill cycle or yearly grain.

\*the year interval is only available if you have more than one year of data.



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- Accounts
- Accounts
- Meters**
- Groups

“Gas” or “Electric” will appear next to the meter as applicable.

Advanced Charting Tools.

Accounts | [ ] | **Basic | Advanced**

Total Cost | Bill Cycle | Sep 8, 2012 - Sep 8, 2015

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- Bill Cycle
- Yearly**
- Bill Cycle

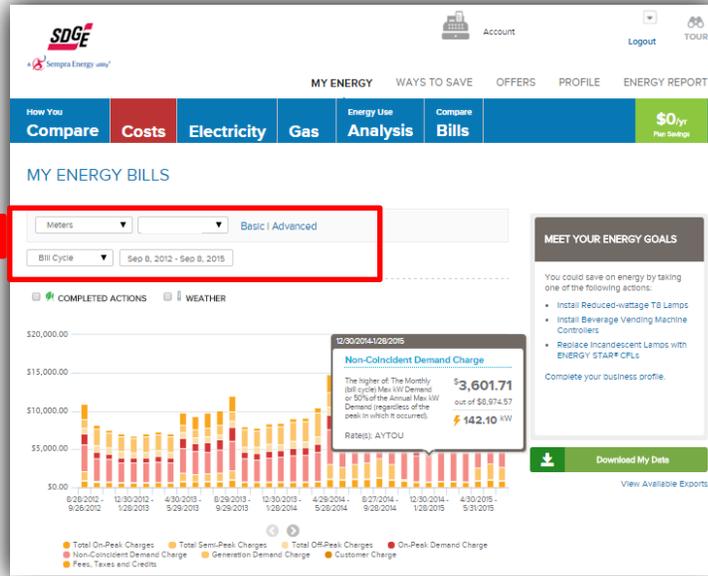


# COSTS – GROUPS CHART CONTROL

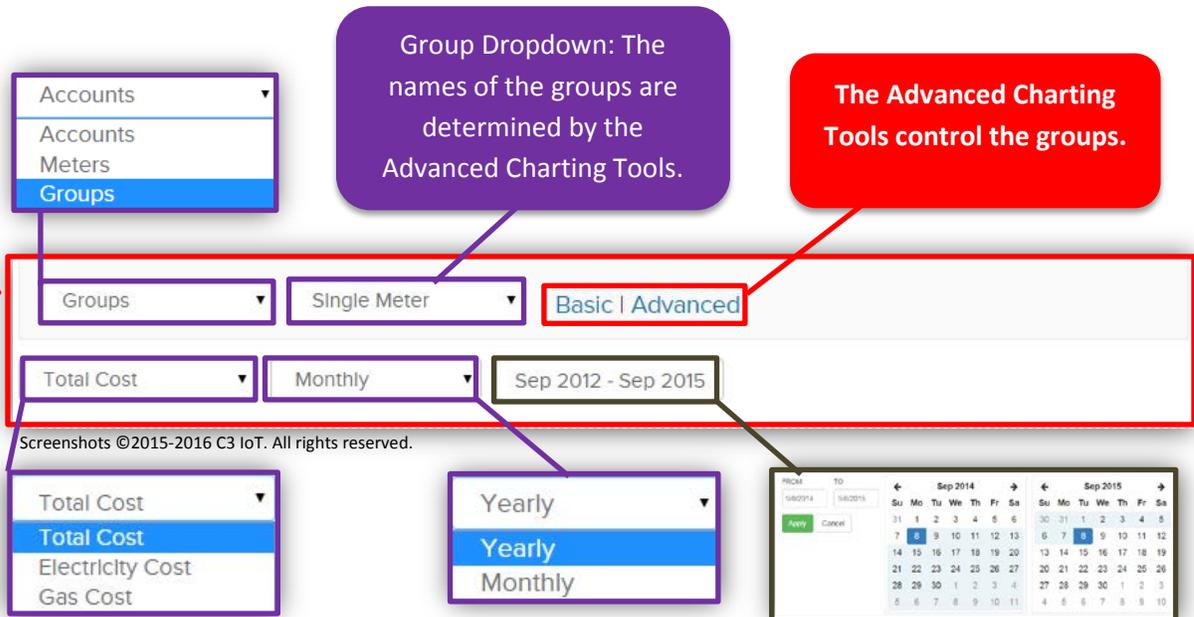
## MY ENERGY – COSTS – GROUPS

When **Groups** is selected in the first dropdown of the Chart Control panel, you may select a custom group for cost analysis. The groups are created using the Advanced Charting Tools. When a group is created a group dropdown menu will appear where you can navigate between groups and refine the data to a specific time grain within the relevant time intervals.

The **Calendar** tool allows you to refine the data to a specific time grain within the bill cycle or yearly interval.



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# ELECTRICITY

## MY ENERGY – MY ELECTRICITY USAGE

**WHAT:** This tool shows you electricity usage and max demand in kWh and kW respectively. The data is available in a yearly, monthly, bill cycle, daily, hourly, or quarter hourly interval and organized by accounts, meters, and groups.

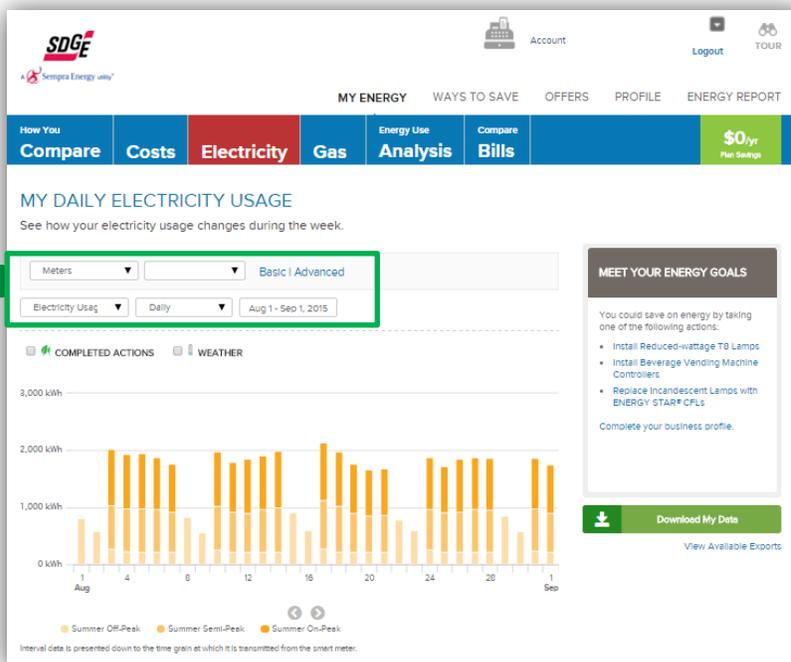
The key feature is Chart Controls that manages what is displayed on the chart. Additional details are provided on the hover-over and you can manage data in more detail with the interactive legend.

### HOW:

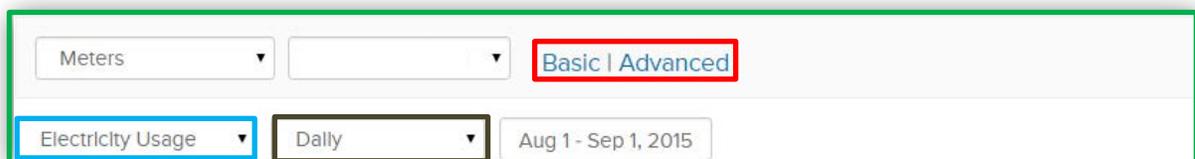
The basic functionality is similar to Costs with two key differences:

1. All data can be displayed in a yearly, monthly, bill cycle, daily, hourly, or quarter hourly interval.
  - For daily interval, select a date range less than 90 days
  - For hourly interval, select a date range less than 72 hours
  - For quarter-hourly interval, select a date range less than 24 hours
2. If **meters** are selected, you can toggle between electricity usage and demand. For demand, the interactive legend includes on-peak and off-peak charges as applicable.

**WHY:** This chart allows you to better understand your electricity consumption and demand over time.



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# GAS

## MY ENERGY – MY BILLED NATURAL GAS USAGE

**WHAT:** This tool shows your billed gas usage in therms (thms). The data is available in a yearly, monthly, bill cycle, or daily interval and organized by accounts, meters, and groups.

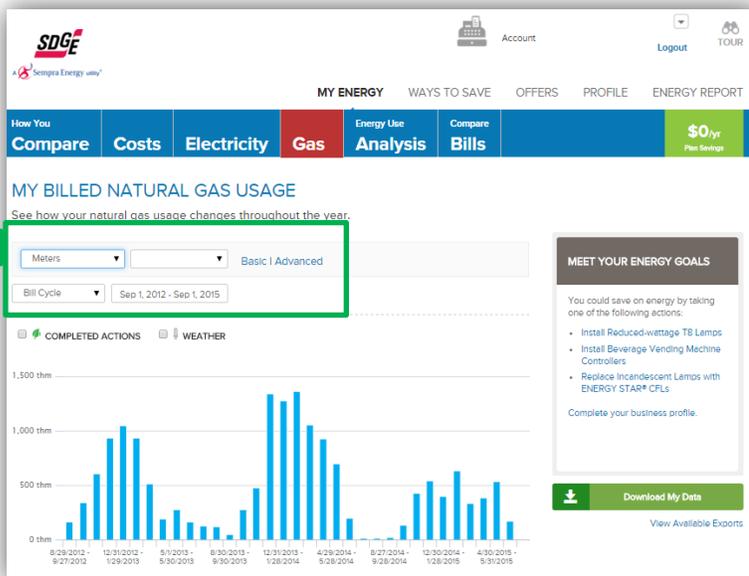
The key feature is Chart Controls that manages what is displayed on the chart. Additional details are provided on the hover-over and you can manage data in more detail with the interactive legend.

### HOW:

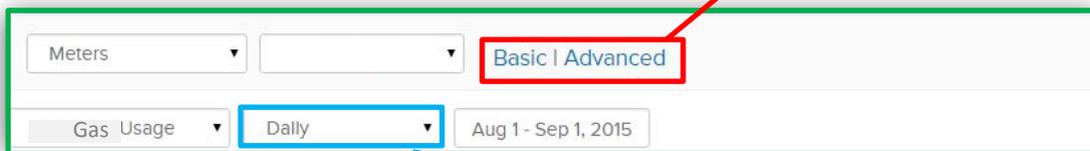
The basic functionality is similar to Costs with one key difference

1. All data can be displayed in a yearly, monthly, bill cycle, or daily interval.

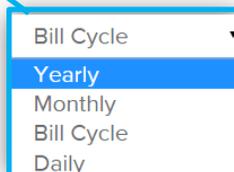
**WHY:** This chart allows you to better understand your gas consumption over time.



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# ENERGY USE ANALYSIS

## MY ESTIMATED ANNUAL ELECTRICITY COSTS BY CATEGORY

**WHAT:** This section shows you an estimated breakdown of your electricity usage or costs by category. *Only accounts with more than one year of data will have access to this section.*

**HOW:** The estimates are based on CEUS (California End User Survey) and CBECS (Commercial Buildings Energy Consumption Survey) data. The estimates also improve based on the information you provide in your building profile.

**WHY:** This chart allows you to better understand energy use “behind” the meter by providing insightful estimates of the allocation of consumption across lighting, HVAC, appliances, etc.

Use dropdown menus to select (electricity/gas) and (cost/usage).

Only accounts with more than one year of data display the Energy Use Analysis tab.

Electricity or gas cost usage breakdown.

“Find ways to save” takes you to the Ways to Save section.

“Complete your Profile” takes you to the Profile section  
*Note: completing a building profile gives a more accurate breakdown of (cost/usage) and provides more recommendations for ways to save.*

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Category	Percentage
Lighting	49%
Other	15%
Ventilation	16%
Office Equipment	14%
Refrigeration	4%
Water Heating	2%

# COMPARE BILLS

## COMPARE BILLS – BILL ANALYSIS

**WHAT:** This section allows you to compare your current or selected billed usage and costs to that of prior bills. *Only accounts with more than one year of data will have access to this section.*

**HOW:** You can choose between comparing electricity/gas, cost/usage against your prior billing period or the same billing period of the prior year. The right sidebar highlights what contributed or may have contributed to charges in the bill.

**WHY:** This chart allows you to visualize changes in costs over time and understand why they may have increased or decreased.

Only accounts with more than one year of data will display the Compare Bills tab.

Select electricity, gas, or both.

Select Cost or Usage

MY ENERGY WAYS TO SAVE OFFERS PROFILE ENERGY REPORT

How You Compare Costs Electricity Gas Energy Use Analysis Compare Bills \$0/yr Plan Savings

### COMPARE BILLS

You spent \$4,913.53 more on electricity than last billing period.

3 Electricity Costs Billing Period Jun 11, 2015 - Jul 12, 2015

2 Prior Billing Period Same Billing Period Last Year

5 Select Billing Period

6 Exact values provided on hover over

7 Bill Analysis

Switch between "Prior Billing Period" and "Same Billing Period Last Year" view

Category	Prior Billing Period (May 12, 2015 - Jun 10, 2015)	Selected Billing Period (Jun 11, 2015 - Jul 12, 2015)
Cost	\$13,669.36	\$18,582.89
Difference		\$4,913.53 more

#### BILL ANALYSIS

Factors that contributed to changes in your bill:

- The temperature on average was 6.0 degrees warmer this billing period **\$5,217.30**
- There are 2 more days in this billing period **\$710.44**

Other factors that MAY have contributed to changes in your bill:

- Your rate changed
- Your hours of operation changed
- You decreased production / staff

**\$4,913.53**

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# ADVANCED CHARTING TOOLS

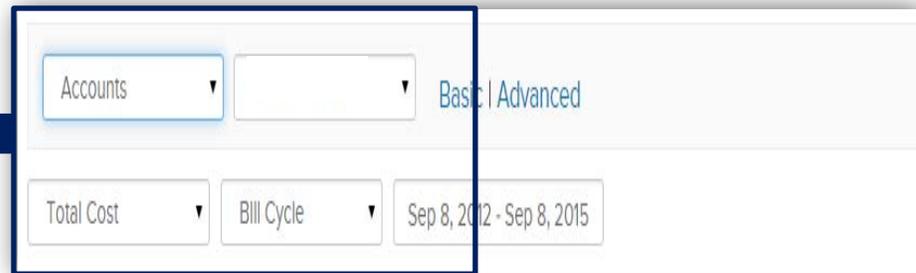
## MY ENERGY - COSTS, ELECTRICITY, AND GAS

**WHAT:** Perform aggregated analysis across multiple accounts and/or meters.

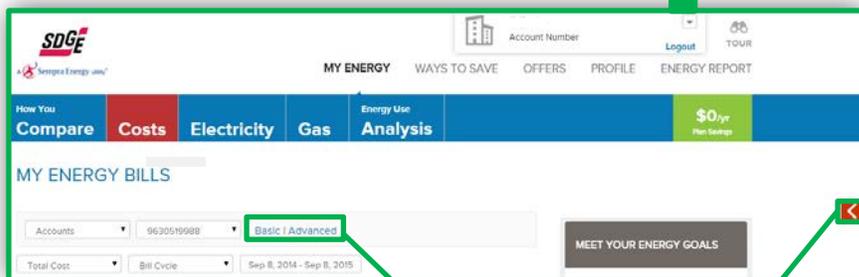
**HOW:** The tool gives you the ability to aggregate accounts and/or meters to create customized groups that appear in the group chart controls – group dropdown menu. After creating a custom group, the group will appear in a dropdown menu when “groups” is selected from Chart Controls.

*You can access the Advanced Charting Tools from the Cost, Electricity, or Gas sub-section of the My Energy tab.*

**WHY:** Provides a holistic view of your portfolio.

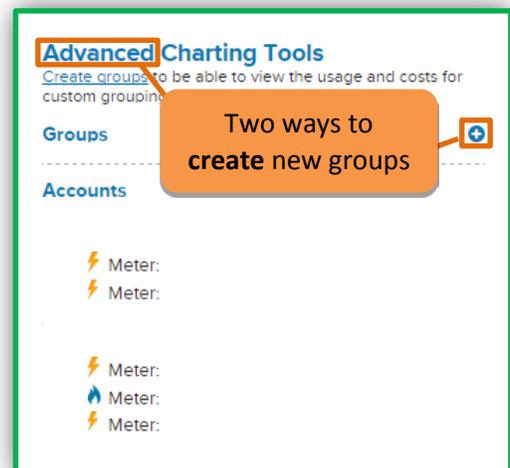


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Two ways to access the Advanced Charting Tools.

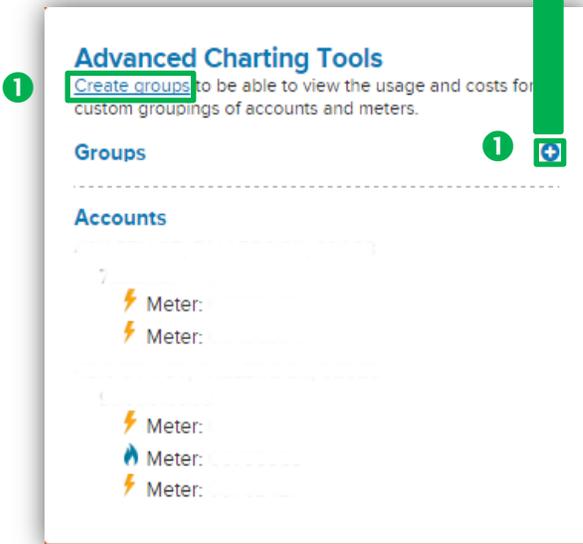


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# ADVANCED CHARTING TOOLS CONTINUED

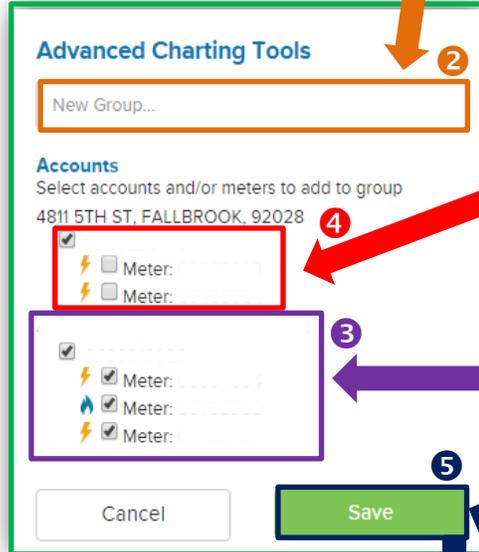
## CREATE NEW GROUP

Two ways to create a group – Select “Create groups” or click the 



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Name your new group

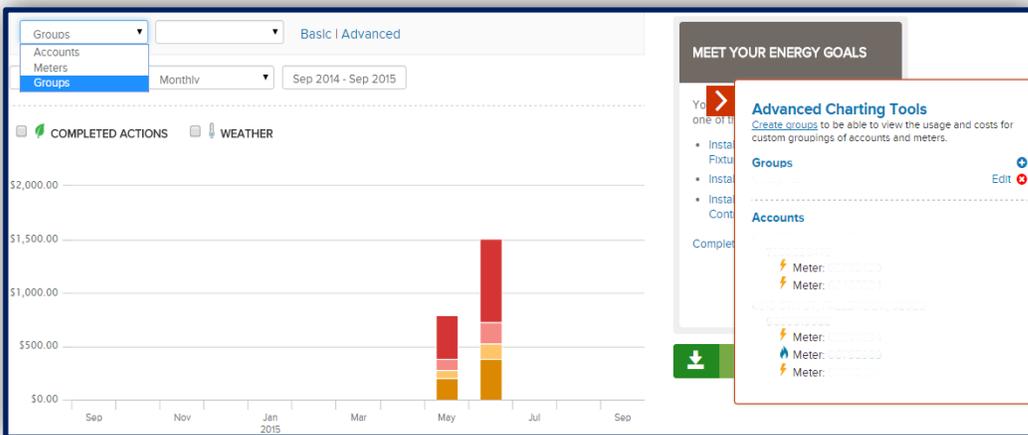


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After selecting an account if you unchecked the associated meters you will be left with the account level charges.

Selecting an account automatically selects all the associated meters.

Save to apply changes – the new group will display in the chart area



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# ADVANCED CHARTING TOOLS CONTINUED

## EDIT, ADD, OR DELETE GROUP

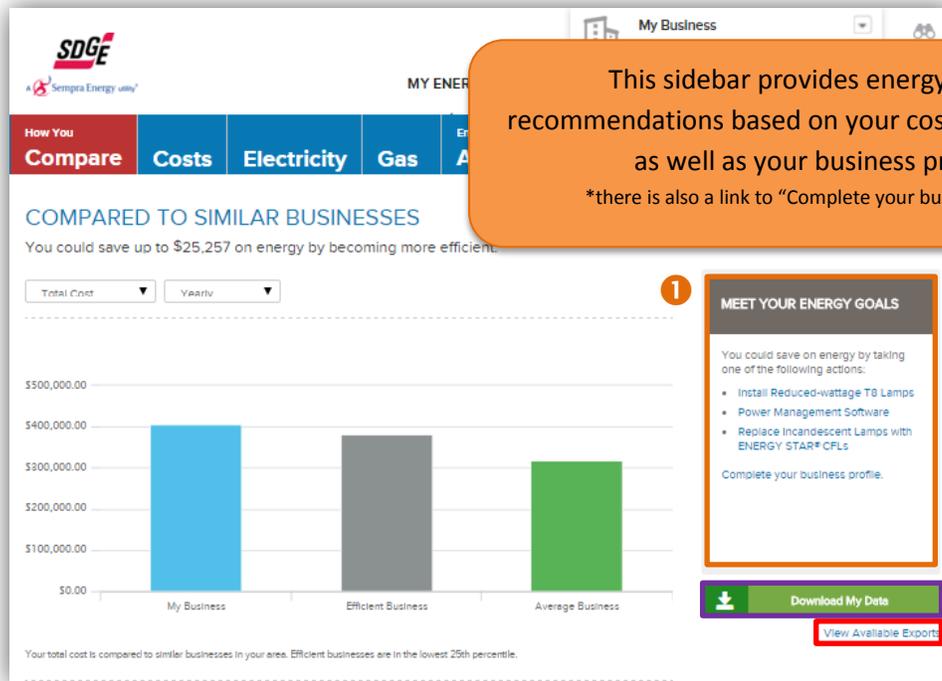
Once you save your group. You can view your group name in the dropdown menu options when “groups” is selected in Chart Controls for the My Energy costs, electricity, or gas sections.

The screenshot shows the 'Advanced Charting Tools' interface. A bar chart displays energy costs from September 2014 to September 2015. The y-axis ranges from \$0.00 to \$2,000.00. The chart shows a significant spike in costs starting in May 2015. The interface includes a 'Groups' dropdown menu (1) with options: Groups, Accounts, Meters, and Groups. A 'Group dropdown menu' (2) is also indicated. A 'Basic' and 'Advanced' toggle is present (6). A 'List of groups' (4) is shown, listing 'Group 123'. An 'Edit' button (3) and a 'Delete group' button (5) are also visible. A purple callout box explains: 'Select Edit to view what meters and accounts are associated with each group or make changes.' A blue callout box explains: 'Delete group - Click [X icon]'.

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# MY ENERGY – ADDITIONAL FEATURES

## 1 MEET YOUR ENERGY GOALS AND 2 DOWNLOAD MY DATA



This sidebar provides energy savings recommendations based on your cost and usage data as well as your business profile\*  
\*there is also a link to "Complete your business profile"

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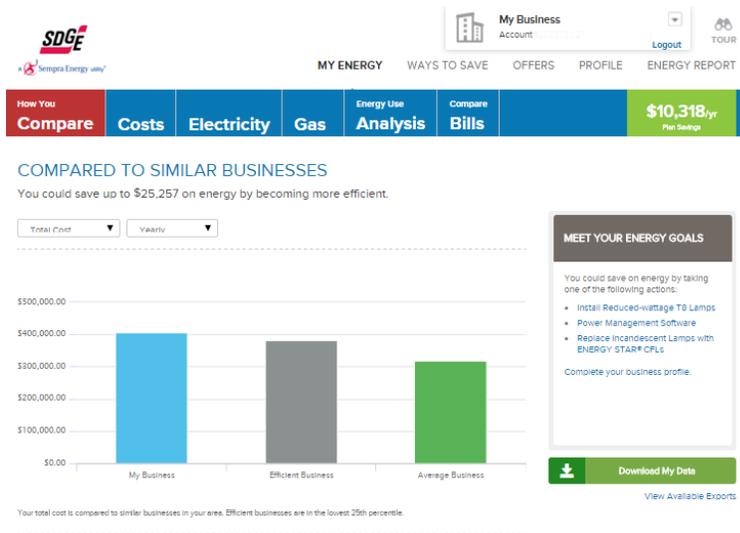
**Download My Data**  
This feature compiles a .csv file of either billing data per account or usage data per meter. After the download is compiled, it is easily accessible through "View Available Exports."  
Both of these features appear across all of the tabs in the My Energy Section.

The 'Download My Data' form has the following fields:  
- 'Select an account for billing data': Radio button for 'Billing data per Account' with a dropdown menu set to 'All Accounts'.  
- 'OR, Select a meter for detailed usage data': Radio button for 'Usage data per Meter' with a dropdown menu set to 'All Meters'.  
- 'Time Period': A date range selector showing 'November 9, 2014 - November 8, 2015'.  
- A green 'Download' button at the bottom right.

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# MY ENERGY – ADDITIONAL FEATURES

## 1 BUILDING PROFILE AND 2 WAYS TO SAVE



If you scroll down in any sub-section of the My Energy tab you will find the “Tell us about your Building Profile” and “My Energy Savings Plan” dashboards.

This section contains two screenshots. The left one, labeled '1', is the 'TELL US ABOUT YOUR BUSINESS' form with a green button that says 'Shortcut to business profile.' The right one, labeled '2', is the 'CREATE AN ENERGY PLAN' page with a purple button that says 'Shortcut to Ways to Save.' The 'Create an Energy Plan' page lists various energy-saving actions with their costs and savings.

Action	Cost	Savings	Payback Period	Status
Install VFD for Fans and Pumps	\$4,852	\$2,737/yr	12 months	Add to plan, Already Complete, Not Applicable
Install Vending Controls				Add to plan, Already Complete, Not Applicable
Install Reduced-wattage T8 Lamps	\$7	\$9/yr	6 months	Add to plan, Already Complete, Not Applicable

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## Section 2

# Ways to Save

MY  
ENERGY

**WAYS TO  
SAVE**

OFFERS

HOW AM I  
COMPARED

ENERGY  
REPORT

CONTACT  
US

---

# Ways to Save

**WHAT:** The “Ways to Save” section of Business Energy Advisor shows you different categories of energy savings opportunities and initiatives while providing insights about cost, savings, and payback period.

**HOW:** It is divided into three tabs – Recommendations, My Plan, and History. Completing and maintaining the building profile customizes the recommendations to best fit your needs.

**WHY:** The Ways to Save section helps you select and track progress of your energy savings initiatives. *Note: the tool helps you track progress, but they must contact your Account Representative or go to sdge.com to begin the relevant rebate process.*

Note: The image below is in the **Recommendations** view.

1 Navigation to “Ways to Save” section	3 Recommendation view.
2 “Ways to Save” Navigation bar	4 Plan Savings Tracker: This number will increase as more initiatives are added by you.

The screenshot displays the 'WAYS TO SAVE' section of the Business Energy Advisor. At the top, the SDGE logo and navigation links are visible. The 'WAYS TO SAVE' navigation bar is highlighted with a green box (2). A 'Plan Savings Tracker' shows a total savings of \$14,841/yr (4). The main content area is divided into three tabs: 'Recommendations', 'My Plan - 2 of 6 Completed', and 'History'. A table lists various energy-saving initiatives with columns for 'All Categories', 'Cost', 'Savings', 'Payback Period', and 'Status'. A dropdown menu is open for 'All Categories', and a red box highlights the table content (3). The table lists several initiatives, including 'Install Evaporator Fan Controllers for Walk-In Coolers and Freezers', 'Upgrade to High-Efficiency Standard or Vet Fryer', 'Install Energy-Efficient Griddle', and 'Upgrade Your High-Efficiency Hot Food Holding Cabinets'.

All Categories	Cost	Savings	Payback Period	Status
Refrigeration Food Service Lighting Plug Load HVAC Hot Water and Laundry Not Applicable Items	\$2,901	\$2,562/yr	4 months	<input type="radio"/> Add to plan <input type="radio"/> Already Complete <input type="radio"/> Not Applicable
Software »	\$1,554	\$1,334/yr	6 months	<input type="radio"/> Add to plan <input type="radio"/> Already Complete <input type="radio"/> Not Applicable
Install Evaporator Fan Controllers for Walk-In Coolers and Freezers »	\$1,618	\$682/yr	21 months	<input type="radio"/> Add to plan <input type="radio"/> Already Complete <input type="radio"/> Not Applicable
Upgrade to High-Efficiency Standard or Vet Fryer »	\$1,008	\$559/yr	6 months	<input type="radio"/> Add to plan <input type="radio"/> Already Complete <input type="radio"/> Not Applicable
Install Energy-Efficient Griddle »	\$774	\$260/yr	2 years	<input type="radio"/> Add to plan <input type="radio"/> Already Complete <input type="radio"/> Not Applicable
Upgrade Your High-Efficiency Hot Food Holding Cabinets »	\$1,892	\$252/yr	6 years	<input type="radio"/> Add to plan <input type="radio"/> Already Complete <input type="radio"/> Not Applicable

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# WAYS TO SAVE

## RECOMMENDATIONS

**WHAT:** This section is a list of customized recommendations to help increase energy savings.

**HOW:** The Ways to Save section pulls the information from the building profile and uses it to generate a customized list of recommendations from the SDGE rebate catalog.

**WHY:** This section provides an opportunity for you to save money and increase energy efficiency.

The screenshot shows the 'WAYS TO SAVE' interface. A green callout (1) points to the 'All Categories' dropdown menu. An orange callout (2) points to the 'Sort List by Cost, Savings, or Payback Period' dropdown. A purple callout (3) points to the 'Status' column with radio buttons for 'Add to plan', 'Already Complete', and 'Not Applicable'. A red callout (4) points to a recommendation row. A purple callout on the right explains the status options.

Recommendations	Cost	Savings	Payback Period	Status
Upgrade to Compact Fluorescent Lighting Fixtures	\$2,100	\$231/yr	8 years	<input type="radio"/> Add to plan <input type="radio"/> Already Complete <input type="radio"/> Not Applicable
			12 months	<input type="radio"/> Add to plan <input type="radio"/> Already Complete <input type="radio"/> Not Applicable
			7 months	<input type="radio"/> Add to plan <input type="radio"/> Already Complete <input type="radio"/> Not Applicable
			7 years	<input type="radio"/> Add to plan <input type="radio"/> Already Complete <input type="radio"/> Not Applicable

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When an initiative is added to "My Plan" the calculated savings from the recommendation details section will be added to the Plan Savings Tracker, which is visible across any section.

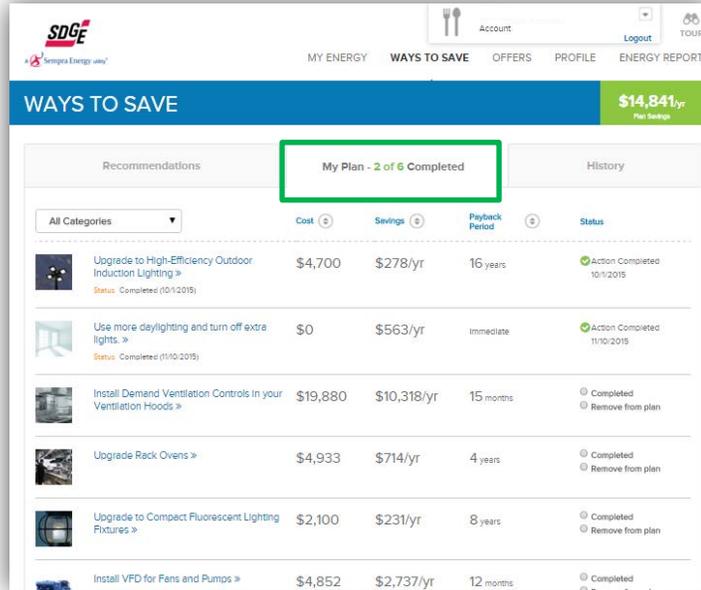
The screenshot shows the details for 'Install Reduced-wattage T8 Lamps'. It includes a form to answer questions for more accurate saving estimates, such as 'How many 32 watt, 4 foot lamps will you be replacing?' and 'Are you replacing these lamps with 25 or 28 watt lamps?'. A 'Calculate' button is present. On the right, a 'Calculated Savings & Costs' box shows: Estimated Yearly Savings \$9, Estimated Cost \$7, Estimated Payback Period 6 months, and Other Yearly Savings Estimates 75 kWh Electricity.

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# WAYS TO SAVE

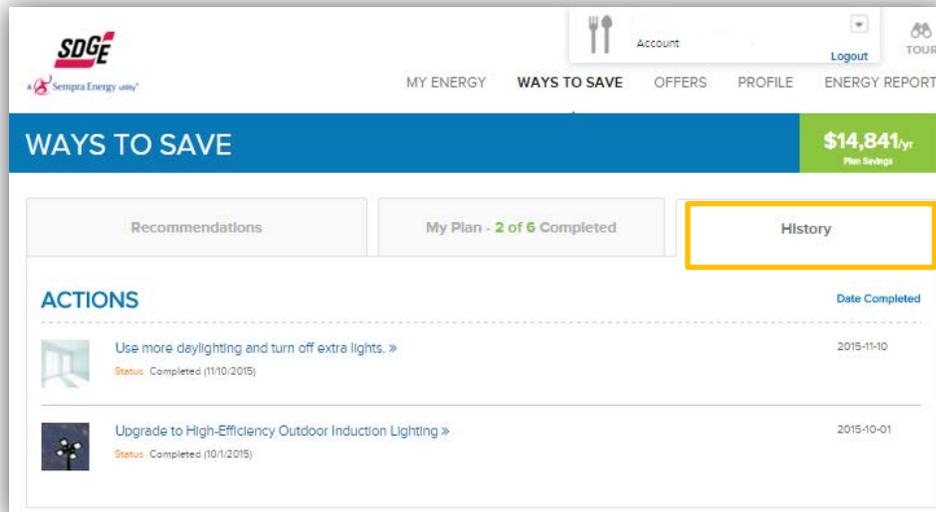
## MY PLAN and HISTORY

The **My Plan** Section contains a list of recommendations that you have added to your plan. It automatically updates the status of your initiative as you progress by updating the “Status column” on the recommendations tab. *Note: This feature is for customer tracking purposes. You should visit [sdge.com](http://sdge.com) to initiate the rebate process.*



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The History section contains a list of your completed initiatives.



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# Offers

**WHAT:** The “Offers” section of Business Energy Advisor allows you to view a customized list of program offers.

**HOW:** This section provides links to [sdge.com](http://sdge.com)

**WHY:** You can understand and take advantage of the latest SDGE program offerings

1 Navigation to “Offers” section

2 Select “More” to view the offer details on the SDG&E website

The screenshot displays the SDGE website interface. At the top, the SDGE logo is on the left, and navigation links for 'MY ENERGY', 'WAYS TO SAVE', 'OFFERS', 'PROFILE', and 'ENERGY REPORT' are in the center. The 'OFFERS' link is highlighted with a red box and a red '1'. On the right, there are links for 'Account', 'Logout', and 'TOUR'. Below the navigation bar is a blue header with the word 'OFFERS' in white. Underneath is a section titled 'PROGRAM OFFERS FOR YOU'. Four offers are listed, each with an icon, a title, a brief description, a 'More >' button, and a URL in a green box. The offers are: 1. Business Energy Solutions (gear icon), formerly known as 'Direct Install', with URL <http://www.sdge.com/save-money/direct-savings-direct-install>. 2. Critical Peak Pricing (dollar sign icon), designed to provide more accurate information regarding the cost of energy, with URL <http://www.sdge.com/business/demand-response/cpp>. 3. On-Bill Financing (dollar sign icon), offers eligible customers zero-percent financing for qualifying energy-efficient business improvements, with URL <http://www.sdge.com/business/bill-financing>. 4. Premium Efficiency Cooling (HVAC icon), part of a statewide initiative to reduce environmental impacts by improving HVAC performance, with URL <http://www.sdge.com/premium-efficiency-cooling>. A red '2' is placed next to the 'More >' button for the first offer.

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Section 3

# How am I Compared

MY  
ENERGY

WAYS TO  
SAVE

OFFERS

**HOW AM I  
COMPARED**

ENERGY  
REPORT

CONTACT  
US

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# How am I Compared

**WHAT:** The “Profile” section of Business Energy Advisor allows you to customize your building profile.

**HOW:** The Profile section provides an organized and detailed method of profile management. The sidebar divides the profile into specific categories that contribute to energy use and provide overall account management.

The Ongoing Business Profile Management feature provides quick access to business profile management throughout the tool.

**WHY:** A more complete building profile allows the tool to more accurately estimate end usage categories and tailor energy savings plans.

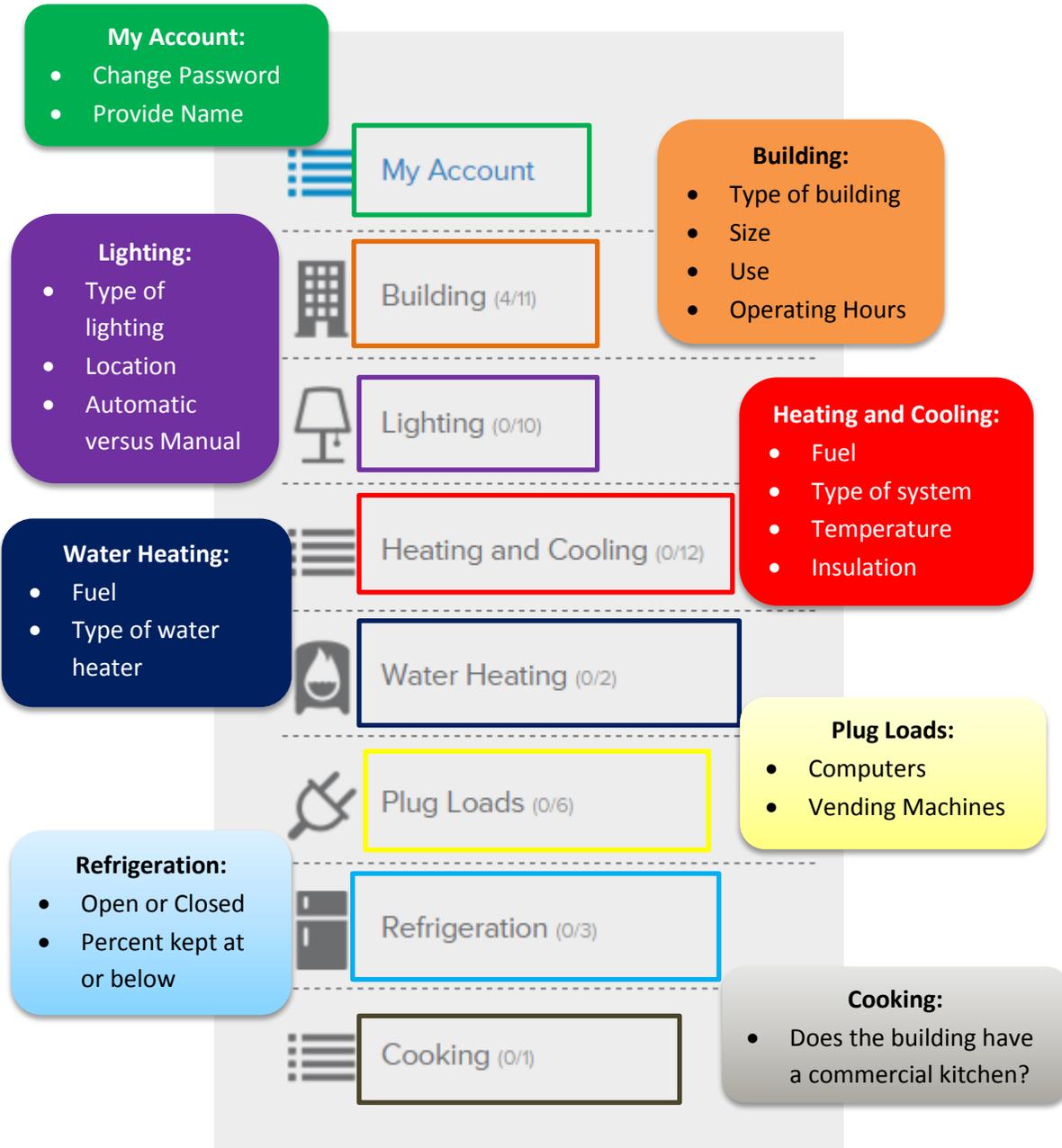
- |   |  |
|---|--|
| <ul style="list-style-type: none"><li>① Navigation to “Profile” section</li><li>② Link to Ways to Save</li><li>③ Profile Categories: Answer questions in each of the categories to complete the building profile.</li></ul> | <ul style="list-style-type: none"><li>④ See profile progress</li><li>⑤ Save your answers on every page</li><li>⑥ Ongoing Business Profile Management</li></ul> |
|---|--|

The screenshot displays the 'BUILDING PROFILE' page on the SDGE website. The page features a navigation menu on the left with categories: My Account, Building (0/12), Lighting (0/13), Heating and Cooling (0/12), Water Heating (0/9), Plug Loads (0/4), Refrigeration (0/9), and Cooking (0/14). The main content area is titled 'TELL US ABOUT YOUR BUSINESS' and includes a progress indicator showing '4% Complete' and '3 of 69 questions answered'. A 'Save' button is located in the top right of the form area. The page also shows a 'Ways to Save' section with a savings amount of '\$14,841/yr'.

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# CATEGORIES

The Profile Section divides your business into eight categories that break down the energy use details so the Business energy advisor can provide personalized feedback to cost save and reduce overall energy consumption.



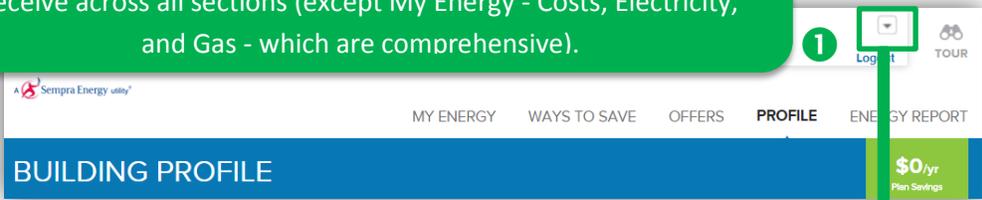
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# ONGOING BUSINESS ACCOUNT MANAGEMENT

At the top of the header in any section, you may switch between accounts and add or delete additional Business Profiles without having to navigate to the Profiles Section.

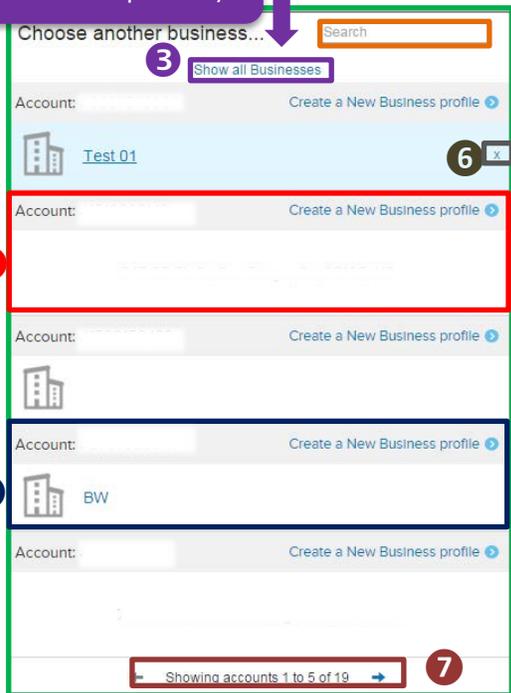
A business profile is associated with one particular account. Details from the business profile will only be applied to insights regarding the corresponding account.

Click on the arrow icon to open the business profile manager Note: the account you select in this view determines the insights you will receive across all sections (except My Energy - Costs, Electricity, and Gas - which are comprehensive).



Toggle between Show all Accounts (including ones without business profiles)

Search



Example of an account without a Business

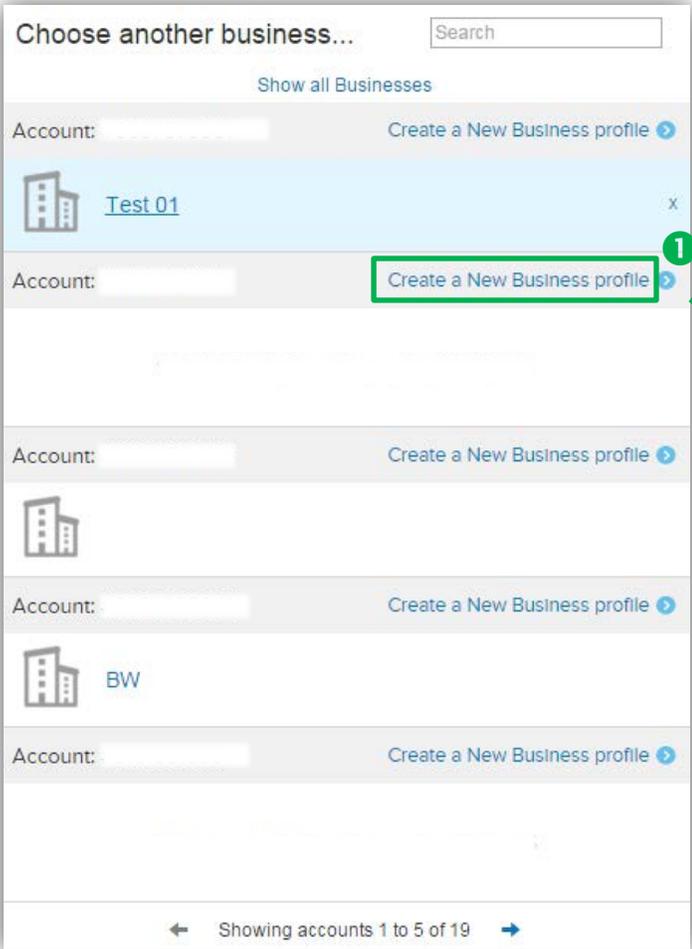
Example of an account with a Business Profile

Delete a Business Profile – Hover over and click on the “x”

Use the arrows to view more accounts if applicable

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# ONGOING BUSINESS ACCOUNT MANAGEMENT – CREATE NEW PROFILE



Click "Create a New Business profile" and the Create a Business Profile pop up menu will appear

The screenshot shows a "Create a Business Profile" pop-up form. It has a title bar with a close button (X). The form contains the following fields and options:

- Header: "Create a new business profile for Account"
- Radio button: "Create another business profile at:"
- Text input: "Enter a name for your business"
- Dropdown menu: "Select industry type..."
- Dropdown menu: "Select business type..."
- Text input: "Select approximate square footage..."
- Buttons: "Done" and "Cancel"

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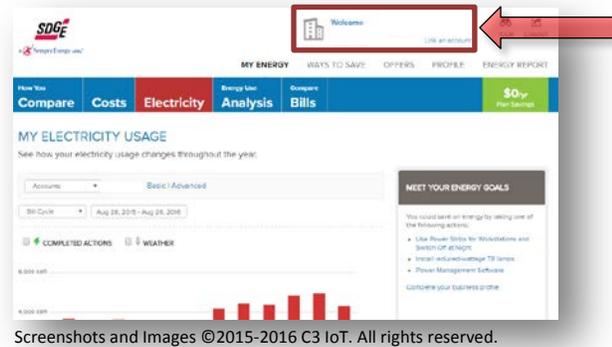
Fill out the form to generate a profile for the associated account. Click "Done" to create a new profile

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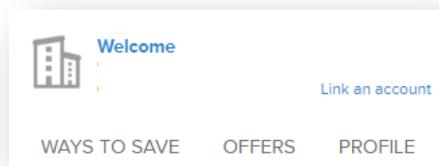
# LINKING ACCOUNTS

Business Energy Advisor gives you the ability to “link” your other SDG&E accounts into your portfolio.

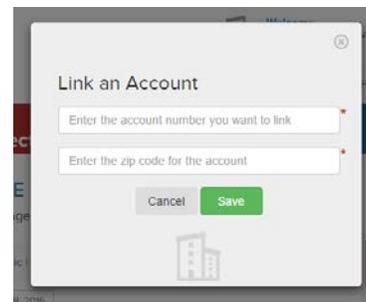
On any screen within the tool, there is a Business Profile Management section:



In this section, the user can click on “Link an account”, which will open a pop up window. Here, the user can enter an account number and the associated service address zip code:

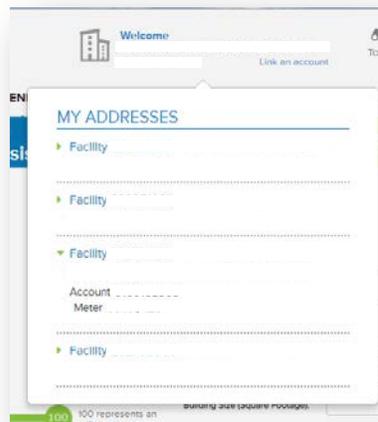


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After clicking “Save”, the account will now be listed along with the other accounts when the user clicks in the Business Profile Management section:



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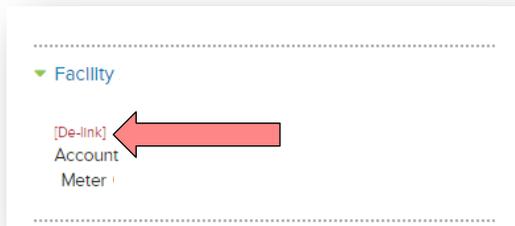
# LINKING ACCOUNTS CONTINUED

By clicking on the green arrow by any account, the user can see details about that account:

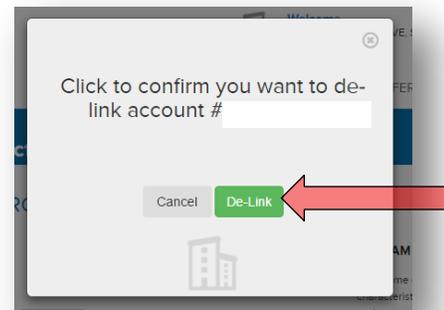


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A previously linked account will have a red “De-link” button in the account detail section. A user can de-link an account from their C3 user account by clicking on this button. A confirmation window pops up and the user clicks on “De-Link” to confirm:



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## Section 4

# Energy Report

MY  
ENERGY

WAYS TO  
SAVE

OFFERS

HOW AM I  
COMPARED

**ENERGY  
REPORT**

CONTACT  
US

---

# Energy Report

**WHAT:** The “Energy Report” section of Business Energy Advisor allows you to quickly **view** and **print** a high-level summarized version of the analysis of your account.

**HOW:** The Energy Report takes data from throughout the tool and synthesizes it into a printable presentable energy analysis document.

**WHY:** These reports are useful for either presentations or other meetings.

## Report Contents:

- Compared to Similar Businesses
- My Electricity Bills
- Demand Response Details
- My Estimated Annual Electricity Cost by Category
- Create an Energy Plan
- Business Profile

SDGE  
Semptra Energy

Account [ ] Logout TOUR

MY ENERGY WAYS TO SAVE OFFERS PROFILE ENERGY REPORT

### MY BUSINESS ENERGY REPORT

\$0/yr  
Plan Savings

A summary of your energy usage and costs over the past year is shown below. You will also find tips on how you can start saving energy and money.

<b>\$972</b> Annual Costs	<b>2,603 kWh</b> Annual Electricity Usage	<b>387 thm</b> Annual Gas Usage	<b>Print my report</b>
------------------------------	--	------------------------------------	------------------------

Scroll down to view the online Energy Report

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Print my report generates an Energy Report pdf download.

*Note: The report may take a few minutes to generate. You must click on the download when it appears at the bottom of the screen to view the document.*

\$1,250.00

energy\_report\_2015-....pdf

Show all downloads...



## Section 5

# Contact Us

MY  
ENERGY

WAYS TO  
SAVE

OFFERS

HOW AM I  
COMPARED

ENERGY  
REPORT

**CONTACT  
US**

---

# Contact Us

The “Contact Us” button is available on the bottom of any page within the Business Energy Advisor tool. **Scroll down** to the bottom of whatever page you are viewing and click the **Contact Us** button to view the Contact Us page.

Contact an Energy Service Specialist by listed phone number or by email message directly from the pop-up.

The screenshot shows the SDGE website's 'Contact Us' page. At the top left is the SDGE logo with the tagline 'A Sempra Energy utility'. The top right features an 'Account' dropdown menu, a 'Logout' button, and a 'TOUR' icon. Below this is a navigation bar with links for 'MY ENERGY', 'WAYS TO SAVE', 'OFFERS', 'PROFILE', and 'ENERGY REPORT'. The main heading is 'Contact Us'. A message icon is followed by text: 'We know your time is valuable, so when you have questions, we want you to be able to find answers as quickly and as painlessly as possible. Fill out this form to receive a response from a SDG&E Energy Service Specialist or call (800) 336-7343 to speak with someone directly.' The form fields are: '\* Name', '\* Email Address', and '\* Message'. A '\* Required Fields' note is present. A 'Send' button is at the bottom right. A blue footer bar contains 'CONTACT US', 'TERMS AND CONDITIONS', and 'PRIVACY POLICY'. Copyright text at the bottom reads '© 2015 San Diego Gas & Electric'. Annotations include a green box pointing to the 'CONTACT US' button in the footer with the text 'The Contact Us button is available at the bottom of any page in the tool. Just scroll down.', and a red box pointing to the 'Send' button with the text 'Don't forget to hit send.'

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