

HOUSE CHARACTERIZATION TOOL INSTRUCTIONS

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1. To begin go to www.housecharacterization.org
2. In the upper right hand corner click the “New User” link
3. Enter your email name@companyname.com
 - It is important that you use your work email so it recognizes you as an allowed user
4. Enter a password (must be at least 6 characters)
5. Click “Submit”
 - An email will be sent you within a few minutes to verify your email address is valid
6. Return to www.housecharacterization.org
7. Enter your email address name@companyname.com
8. Enter your password
9. Click “Login”
10. You will now be looking at the main menu with your houses listed on the left and recently viewed houses on the right
 - You will not see any houses at this point because you have not entered any
 - Once houses are entered you will be able to navigate your own houses and also those within your company
 - To search your own houses make sure the radio button is on “your houses” and type in corresponding search criteria (if you type “a” it will pull up all houses with an “a” in that field)
 - You can also just click search and it will show all of your houses without having to enter search criteria
 - To search houses within your company make sure the radio button is on “company wide”
 - Use the same search function as above for “your houses” or simply click search and all houses within your company will be displayed
11. To add a new house click the “Add a new house” link on the right of the screen
 - This will prompt you to enter information about the custom id, customer name, customer phone number, address, etc.
 - It is important to enter all aspects of the address if you wish to use the map feature
 - Address, year built and phone number are required fields
12. Click “Create”
13. This will take you into the House Characterization tool

Once in the House Characterization tool simply start checking the items that apply to that house. The first page will configure the House Level. The second page will configure the House Complexity. Together the two numbers will provide you with the House Characterization Score. Remember the levels are on a scale from 1-5 with 1 being the easiest and 5 being the most difficult. There is also a pricing tool located at the bottom of the page that will generate an estimated quote for that house depending on the variables you enter.

Using the Map feature:

The map feature utilizes Bing maps to enable an assessor or salesperson to gather information about a particular house prior to ever having a site visit. This can be used in conjunction with contacting the homeowner to ask questions regarding heating equipment, duct type, and duct locations. If you are not familiar with Bing maps please take some time to explore their site: <http://www.bing.com/maps/>

There are currently two versions of Bing Maps available. The one the House Characterization tool defaults to is the standard Bing Maps. This version will automatically zoom into the address entered and enables you to rotate 360 degrees around the house using the black controls in the upper left hand corner. The second version is still in beta and is called Bing Maps Beta. This can be found on the Bing Maps link given above. the Beta version is preferred because it enables more fluid rotation and slightly closer zoom capabilities. If you wish to use Bing Maps Beta, it will require installing Microsoft Silverlight (free of charge). Because of this installation process the House Characterization tool opted to use the standard Bing Maps. However if you are technically inclined and would like to see the Beta Map in conjunction with the House Characterization tool, follow the steps below. If not, skip these instructions and simply use the map linked to the address provided within the House Characterization tool.

- Using Bing Maps Beta in conjunction with the House Characterization tool:
 1. With the House Characterization tool open create a new “tab” in your web browser (often Ctrl+T)
 2. On this new tab go to <http://www.bing.com/maps/>
 3. Click the “Try It Now” Bing Maps Beta link on the left hand side of the screen
 - This will most likely prompt you to install Microsoft Silverlight. If it does not then it is already installed and skip to Step 6
 4. Install Microsoft Silverlight
 5. Once installed Bing Maps Beta will be functional in that browser
 6. Leaving the Bing Maps Beta tab open, return to the House Characterization browser tab
 7. Click the “Map” function and a tab will open using Bing Maps Beta. The Beta version will not zoom automatically but will instead place a red marker at the address. Zoom to that marker using the on screen zoom controls or the wheel of your mouse.
 8. Once zoomed into the house location use the rotational controls at the bottom center of the map to rotate 360 degrees around the house. Input the information into the House Characterization tool by switching back and forth between the browser tabs.
- * *In order to use the Bing Maps Beta for the House Characterization map function you will always have to open a secondary tab, visit the Bing Maps Beta page, leave the browser tab open and then return to the House Characterization tool and click “Map”. This may seem cumbersome but the functionality of the Beta version is worth the extra effort. Eventually Beta will be standard and we will always link to it.*

Once all of your variables are entered into the house remember to click save and that house will be stored in database for you and other members of your company to view.

Please keep in mind that this tool is still in its Beta version and that Advanced Energy welcomes input. There is a "FEEDBACK" button located in the center of the red banner at the top of every screen. If you have any trouble with the site, have suggestions for improvements or questions please utilize this feedback feature. If you do not wish to use the feedback feature then please email Matt Keeler (mkeeler@advancedenergy.org) or call directly (919.857.9049). Thank you and we look forward to your feedback.