Software Comparison Guide

Several software modeling options are now accepted by the NY Home Performance with ENERGY STAR® program. Use this guide to compare options to find the one that best fits your business.

For additional information or purchasing inquiries, please work directly with the software companies listed below.

CAKESYSTEMS™

OPTI**MISER**®
power | simplicity | accuracy

Snugg Pro

TREAT

NEW YORK STATE OF OPPORTUNITY. | NYSERDA

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CAKESYSTEMS™

Pricing Options	License is per user login, with two options available: • Pay Per Use – For low volume – $25.00 per site/audit • Premium Plan – Unlimited Audits, 1-3 users, tech support, and mobile app use – $99.99/month
HPXML Generation	Yes
User Interface	Online application. Can be used offline for data collection only with mobile app.
Select Features: Single Family	Single Family Detached or Attached Single Family.
Calibrated or Uncalibrated models	Uncalibrated models only.
Customizable Report	User can upload a logo or photo to customize the header of the report. Report content is standardized; for larger organizations, the report can be customized for an additional fee with an Enterprise Account.
Inputs	Core inputs for CakeSystems to generate an energy model are very streamlined and simple. More detailed inputs are available to be entered in the Proposal Generator feature.
Mobile Application	Data collection app works with Android and iOS operating systems. Tablet and smartphone compatible. Data collection only in offline mode. Synchronize and use the software directly when connected to the Internet.
Technical Support	Included with Premium Accounts.
Training	A 3- to 4-hour, self-paced online training and 2-hour live webinar are available for $199/user. 6 BPI CEUs for software training awarded.
Scenario Management	Proposal Generator feature provides the ability to create an unlimited number of project reports. Auditors can use the project reports to offer the homeowner different scenarios for improving their home which include both savings and estimated cost numbers.
Accreditation	Approved for the following programs: • Mass Save EPS • Washington Community Energy Efficiency Program • AEP Ohio In-Home Energy Program • Missouri Home Energy Certificate • Seattle City Light/Community Power Works • Clean Energy Works Oregon • Energy Trust of Oregon • NYSERDA - NY Home Performance with ENERGY STAR® Program • Energy Upgrade California® Home Upgrade • HPXML 2.1 compliant
Quality Management and Business Features	CakeSystems simple inputs are optimized to speed up your workflow, so you can spend more time selling work and doing jobs, and less time filling in forms. Report templates feature allows users to quickly insert commonly used text when creating the homeowner reports, saving time and standardizing the language auditors use across your organization. Enterprise Accounts include additional configurable options including: dashboard for tracking audit pipeline, system alerts, customized homeowner reports and a QA module. Data extracts can be created as a spreadsheet, HPXML, or optionally connected to databases and CRMs like SalesForce.
Initial Launch Pricing Promotion	CakeSystems introductory offer for NYSERDA participating home performance contractors: • 6 month Premium Plan for $499 with free training (save $300 total)

Pricing Options	OptiMiser is free to try for 30 days from www.omaudits.com. Per-project and monthly license types are available: • Silver (per project) licenses cost $25 per project with a one-time setup fee. • Gold (monthly) licenses cost $150 per month per user for 40 projects per month - $3.50/project over 40 and NO setup fee. Complete details are available at www.omaudits.com.
HPXML Generation	Yes
User Interface	OptiMiser's user interface is downloadable and optimized for touch-enabled Windows tablets. It provides full offline access to real-time physics-based modeling, automated utility calibration, and customizable report generation. Complete hardware and software requirements are available at http://optimiserenergy.com/getting-started.
Select Features: Single Family	OptiMiser analyzes and reports on single-family buildings and single units in multi-unit buildings. OptiMiser also supports single-zone modeling of whole multi-unit buildings.
Calibrated or Uncalibrated Models	OptiMiser combines industry standard physics-based modeling (real-time hybrid degree-day/hourly) with the most advanced utility bill analysis and calibration system available for residential systems. An intelligent auto-calibration system maximizes available information — including anything from zero to 26 utility bills — and eliminates guesswork.
Customizable Report	Over 40 user-customizable PDF report pages are available to select from, or use a pre-selected report. Add: • Up to 90 photos with captions • Custom meaures and costs • Homeowner concerns • Project-specific notes and recommendations OptiMiser reports energy savings and payback in a variety of visual formats. Reports can include multiple packages and financing scenarios with configurable loan terms. In addition to homeowner reports, OptiMiser includes and automatically generates complete workscope/bid documents with your custom pricing and as many detailed line items as you want. Workscope documents can be saved separately and opened in Excel.
Inputs	OptiMiser is both streamlined AND extremely precise. OptiMiser's unique Audit Wizard interface revolutionized building modeling by overcoming the boundary between simple/low-precision tools and complex/higher-precision ones. Enter only information you know—don't waste time guessing to make the model work! OptiMiser makes the most out of all available information, from utility bills (if available), your inputs, local weather, and detailed age and location-based defaults to maintain the model in the most realistic state possible, all in real-time. And OptiMiser's calibration charts and load tables provide visual feedback on how the model stacks up against historical usage, automatically adjusting with every click of a button.
Mobile Application	OptiMiser runs on Windows 7/8 touchscreen tablets such as the Microsoft Surface Pro 2/3, Acer Iconia W700, and many others. OptiMiser does not run natively on iOS or Android devices.
Technical Support	OptiMiser provides phone, email, and web-based support for all users. Start with up to an hour of one-on-one help, use our online forum and video library, and attend weekly free webinars. Easy issue-reporting is built into the interface. Typical response time is under 2 hours.
Training	OptiMiser provides free, live web-based training and self-service learning resources.
Scenario Management	OptiMiser can analyze and report on multiple improvement packages. Users can manually select packages or let OptiMiser automatically build optimal packages within specified cost bins. Users can also include financing and incentive details with configurable loan terms.
Accreditation	• DOE BESTEST • BPI-2100 • BPI-2200 • ANSI/BPI-2400-S-2012 • BPI-2101 • DOE Home Energy Score API Partner • NYSERDA - NY Home Performance with ENERGY STAR® Program • Home Performance with ENERGY STAR® compliant homeowner report • HPXML 2.1 compliant
Quality Management and Business Features	Deliver what clients want and meet program needs in less time with these quality management and business-friendly features: • Automatic reporting • Real-time quality assurance checks and messages that direct the user to critical inputs • Reduced double-entry with automated homeowner reporting, workscope, and incentive reporting • Flexible measure library with good defaults and unlimited customization • Can pre-fill PDF forms and capture signatures onsite • Connect to databases and CRMs like Salesforce • Unlimited customization potential — contact us to learn about fast, efficient options for customizing reports, forms, workscopes, even custom calculators and databases
Initial Launch Pricing Promotion	Use OptiMiser FREE for 30 days: www.omaudits.com
Utility Administration Pricing	OptiMiser is free to evaluate. Contact us for extended evaluation licenses: info@optimiserenergy.com.

Snugg Pro

Pricing Options	• Retail Price: $30 per project (based on each unique address entered into system)
	• Special Pricing for NYSERDA contractors: Single project: $25
	• Pre-paid subscription pricing:
	    • $200/month, 10 projects included, $20/project after that
	    • $300/month, 20 projects included, $15/project after that
	    • $480/month, 40 projects included, $12/project after that
	    • $1000/month, 100 projects included, $10/project after that
	• Unlimited users • No per-user fee or seat license • No setup fee • No annual fees
	• Free unlimited live chat, email and phone support
	• Easy and instant online signup at http://snuggpro.com

HPXML Generation	Yes
User Interface	• Cloud-based online tool: data is saved in the cloud. • Fast and powerful modern user interface that dynamically adapts to smartphones, tablets or computers. • Projects are always in sync across multiple devices. This means a contractor can walk through a house with a smartphone and then use a computer at the office to prepare the report. • Runs on PCs (Mac OS X & Windows), tablets (iOS, Android, Windows) and smartphones (iOS & Android).
Select Features: **Single Family**	Snugg Pro provides powerful calibrated results for single family units. Calibrated results are also available for multifamily units that are individually metered for both gas and electricity.
Calibrated or **Uncalibrated models**	SnuggPro supports both calibrated and uncalibrated modeling.
Customizable Report	Highly customizable audit and sales report designed to quickly convert audits into sales.
Inputs	Initial input screen allows for very simple inputs that can be gathered and entered in less than 20 minutes. Detailed inputs are available for more specific information gathering and increased accuracy.
Mobile Application	Specifically optimized for mobile devices. Works great on tablet computers and smartphones.
Technical Support	• Snugg Home's products are extremely easy to use. • All users receive comprehensive, free training and support. Our extensive in-house customer support (http://snuggpro.com/support) includes dedicated full-time tech support specialists that ensure fast response times via built-in live chat, phone and email. • An extensive online knowledge base ensures users are always accessing the latest help documentation.
Training	• Free webinars • Availability of custom trainings either via the Web or on location • Access to recorded training webinar • Searchable knowledge base with how-to articles: http://snuggpro.com/help
Scenario Management	Custom recommendations provide great flexibility to allow for complex scenarios, including those that go beyond energy efficiency into home improvements and renewable energy.
Accreditation	• BPI-2100 • BPI-2200 • ANSI/BPI-2400-S-2012 • BPI-2101 • DOE Home Energy Score API Partner (pending) • Green Button Partner (pending) • Energy Savvy Optix partner • Official software for Xcel Energy Colorado's Home Performance Program Approved for the following programs: • LEAP Virginia • Greater Cincinnati Energy Alliance • Efficiency Maine • ReEnergize Pgh • NYSERDA - NY Home Performance with ENERGY STAR® Program • Energy Upgrade California® Home Upgrade • APS • SRP • HPXML 2.1 compliant
Quality Management and **Business Features**	User management: • Easily invite users to join your company • Set user roles for individuals • Assign users to specific projects • See all projects across all users within your company • See all your companies with a single Snugg Pro account (useful if you work with multiple companies) Project management: • Move projects between stages in a process • Sort and search projects by program, company, auditor, stage and more • Export projects in CSV and HPXML • Offer program financing and/or custom financing with built-in loan calculator • Create company-wide or user-specific project templates • Beautiful homeowner report is flexible and optimized for conversion: http://snuggpro.com/report.pdf
Initial Launch **Pricing Promotion**	Pricing above is special pricing for the NYSERDA - NY Home Performance with ENERGY STAR program only. Snugg Pro does not have an introductory price— users can sign up for free anytime without a credit card. Each account comes with two fully functional, editable sample projects—one blank and one filled out with sample data (the report output is watermarked as 'Sample'). Users only need to enter a credit card and activate billings to create a real project.

TREAT

Pricing Options	TREAT Single Family costs $495. Bulk discounts are available for larger organizations and start at 7 Single Family Licenses for 10% off. Each License is valid on one (1) computer only. TREAT comes with 1 year of free technical support. There are no additional per model costs.
HPXML Generation	Yes
User Interface	Downloaded and installed on a computer. No internet access is required to run.
Select Features: Single Family	Single Family TREAT supports up to 4 living units and offers the "New Building Wizard" to streamline the modeling process. Customizable preferences can help users make models quickly and easily. Projects can also be saved as general templates and customized to model the individual home. Visit **https://psdconsulting.com/software/treat/treat-3-4/** for a full list of features or to try a 30-day demo
Calibrated or Uncalibrated models	TREAT supports both modeling use cases: baseline model with calibration, and baseline model without calibration. TREAT has a built-in billing analysis regression tool and provides feedback on the error of the baseline model as compared to the weather-normalized billing data by fuel type and end-use. This helps the user know which inputs need to be adjusted to properly calibrate the model, greatly increasing the accuracy of the savings estimates. TREAT models can be generated without model calibration if utility bills are unavailable.
Customizable Report	TREAT reports can be branded with your logo from within TREAT itself. Reports can also be exported to Microsoft Word for even greater customization as needed. TREAT has over 20 reports designed for customers and auditors. Compare billing data to model data (if available), highlight a specific home improvement package to engage with customers or compare up to 3 packages in an easy to read table. The New and Improved Home Performance Report is an attractive way to deliver information about the current status of a home and your proposed improvement. TREAT reports financial savings based on a Savings to Investment Ratio (SIR) with adjustable financial information. Show your customers the total cost of a project as well as the amount of savings of both energy and money on a yearly basis.
Inputs	TREAT building modeling software is flexible. The "New Building Wizard" streamlines the single-family modeling process and allows users to create a model in as little as 20 minutes. Inputs have varying levels of detail and complexity designed for users to be as general or specific as needed. The interface streamlines the modeling process by outlining the proper order to follow when building a model.
Mobile Application	TREAT runs on Microsoft Windows and works with any 2-in-1 tablet or laptop running Windows. Using TREAT on a Mac requires running Windows on a partitioned hard drive or parallels. Currently TREAT is not supported on Android or iOS.
Technical Support	TREAT purchases comes with 1 free year of technical support. During this year users can log help tickets or call the support hotline. This contract also allows users to upgrade to the latest versions of TREAT for free. After the first year there is an annual fee of $200 for Single Family TREAT users to maintain customer support and free upgrades. An active license is also a requirement for moving TREAT to a new machine.
Training	Free online introductory videos are available at **http://psdconsulting.com/software/treat/treat-training-videos/**. You can also take a tour of TREAT at **http://psdconsulting.com/software/treat/tour-treat/** Online courses are offered for Single Family TREAT. These courses provide 6 BPI CEUs and an official certification of course completion by PSD.
Scenario Management	TREAT allows modelers to analyze a variety of improvement packages within one model. Individual improvements can be combined into any number of packages showing the interactive SIR of all measures within that package, as well as the total package SIR. Multiple packages can be created using the same base model for quick comparisons without having to build a new model. The Package Comparison Report easily compares up to 3 scenarios at a time and presents them to potential clients.
Accreditation	• Certified by the US Department of Energy (DOE) as a Weatherization Assistance Program Tool for all single and multifamily building types, including mobile homes • RESNET Accredited Existing Homes Tax Credit Compliance Tool • DOE BESTEST • ANSI/BPI 2400 Standard • NYSERDA - NY Home Performance with ENERGY STAR® Program • NYSERDA Multifamily Performance Partners (MPP) Program tool • TREAT is the official weatherization tool used by the State of Washington Weatherization program • New Hampshire Utility Home Performance Program tool • EmPOWER Maryland Low Income Energy Efficiency Program tool • Visit **https://psdconsulting.com/software/treat/treat-accreditation/** for more information • HPXML 2.1 compliant
Quality Management and Business Features	TREAT runs a "model inspector" tool each time a user calculates the model. This tool examines the data that has been entered for the base building and each improvement package to catch common data input errors. The verification algorithms are general rules that check that the input and output data have a minimum level of consistency with a logical building model and with TREAT calculation algorithms. Users can create custom treatment workscopes to be used by technicians in the field. These workscopes ensure that the proper installation method is being followed, and can help engage with customers about the next steps in the retrofit process. TREAT has flexibility in reporting and data export formats (Word, Excel, PDF, HPXML) to support specific business model and reporting needs.
Special Pricing	Current TREAT users can upgrade to the latest version of TREAT for FREE as long as the license is active. Check your license status by visiting **http://psdconsulting.com/software/treat/treat-license-checker/**. If your license is not active simply pay the standard TREAT renewal fee to access FREE Upgrades and Customer Support for an entire year! Expired license renewals and new purchases will qualify for a 10% discount through July 31. Contact Nate Asbeil for details at **nasbeil@psdconsulting.com** or 215-381-2929 x 313.