

**AHRI DIRECTORY
OF CERTIFIED PRODUCT PERFORMANCE –
USER GUIDE FOR LICENSEES**

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Preface

The AHRI Directory of Certified Product Performance is available for products under the following categories:

Residential

Air Conditioners and Air Conditioner Coils
Boilers
Direct Geothermal Heat Pumps
Direct Heating Equipment
Furnaces
Heat Pumps and Heat Pump Coils
Heat Pump Pool Heaters
Indirect Water Heaters
Variable-Speed Mini-Split and Multi-Split Air Conditioners
Variable-Speed Mini-Split and Multi-Split Heat Pumps
Water Heaters
Water-Source Heat Pumps

Commercial

Air-Cooled Chillers
Air-to-Air Energy Recover Ventilators Components
Air-to-Air Energy Recover Ventilators Packages
Automatic Commercial Ice-Cube Machines and Ice Storage Bins
Boilers
Central Station Air-Handling Unit Casings
Central Station Air-Handling Unit Supply Fans
Commercial Refrigerated-Display Cases
Datacom Cooling
Finned Tube Radiation
Forced-Circulation Heating and Cooling Coils
Furnaces
Liquid to Liquid Brazed & Fusion Bonded Plate Heat Exchangers
Liquid to Liquid Heat Exchangers
Non-Condensable Gas Purge Equipment for Use with Low Pressure Centrifugal Liquid Chillers
Packaged Terminal Air Conditioners and Heat Pumps
Reclaimed Refrigerants
Refrigerant Recovery/Recycling Equipment
Refrigerant Testing Laboratories
Room Fan Coil Units
Single Package Vertical Air-Conditioners and Heat Pumps
Transport Refrigeration
Unit Coolers
Unit Ventilators (PDF Directory)
Unitary Large Equipment
Variable Air Volume (VAV) Terminals
Variable Frequency Drives
Variable Refrigerant Flow (VRF) Air-Conditioners and Heat Pumps

Water Heaters
Water-Cooled Chillers
Water-Source Heat Pumps

Quick Start Tips

Users are encouraged to review this manual in its entirety to fully understand how to use the Directory. However, here are some quick tips and information for using the tool effectively:

- AHRI has migrated data from the old system for all licensees who were participants in the certification program as of 12/29/2017.
 - The Directory only allows one brand name per record. For any record migrated from the old system which had multiple brands names under the same reference number, these brands have been split into individual records. Each of these records has been assigned a new reference number. The old reference number, as well as the new reference number, are searchable. The old reference number will continue to appear alongside the new reference number for a few months while Licensees update marketing materials.
- The Directory permits the same model number to be used more than once provided the brand name on each record is different. There is no requirement for the different brand records to have the same ratings.
- Model statuses are slightly different than the old system. “Production Stopped” replaces “Discontinued.” Models with “Production Stopped” model statuses are those that an AHRI Certification Program Participant is no longer producing BUT is still selling or offering for sale. “Discontinued” replaces “Archived.” Models with “Discontinued” model statuses are those that an AHRI Certification Program Participant model no longer produces AND is no longer selling or offering for sale.
- To add/edit records and view non-published data the licensee must log into the Directory. To log into the Directory, the user must have an AHRI account and be configured by AHRI Staff. Contact AHRI Certification to request access or assistance.
- Use the utilities under “Manage Directory Records” to add and edit records. Do not use the “Upload Files” utility which is only intended for sending PDF files (i.e. test reports) to AHRI.
- Before creating records, the licensee must have at least one brand name in the system. If the program contains regulated product, the licensee must have at least one manufacturer name in the system. These can be added through the [“Manage Brand”](#) and [“Manage Manufacturer Name”](#) functions.
- For programs dependent on characteristics records (i.e. USAC, VSMSAC, USHP, VSMHP, VRF, ERV), at least one active characteristic record must exist in the database before a licensee can create a new OEM certified product record.
- If using mass add/edit templates:
 - There are rules for how the files to be uploaded must be named. Failure to follow the file naming convention will result in the system being unable to recognize the file.
 - The system can only accept data inserted into the .xlsx templates downloaded from the system or in .txt tab delimited format (available for mass add records only).

- The user does not have to remain logged into the system while an uploaded file is processing. The user will receive an email when the system has finished processing the file or notification if the file was unable to be processed. Log into the system and review the Mass Upload Status dashboard to confirm success/failure of file uploads. Also access failed record files from this dashboard. These files can be downloaded, corrected based on validation errors, and uploaded to the system again.
 - The system has a maximum upload file size of 25,000 records.
- A maximum of 500,000 records can be accessed through the View/Download functions.

Important Terminology

Active (Licensee status) – a licensee who is a current applicant or participant in the AHRI Certification Program

Active (model status) – a record in production, or one that is being marketed, but is not yet in production. An “Active” record is certified. Participant records with model status “Active” have passed validation.

Applicant – a licensee who has applied for entry into an AHRI Certification Program

Authenticated user – an individual with permission to sign into the AHRI Directory with the purpose of accessing back-end functions. OEM licensee users, AHRI Certification staff, and subscribers are authenticated AHRI Directory users.

Brand name – name that a product or group of products is traded under for commercial purposes. Generally, brand name is how the product is recognized by the HVACR industry and its consumers. Brand name may or may not be the same as licensee name and/or manufacturer name. Brand name appears on Energy Guide labels.

Discontinued (model status) – model no longer in production or available for sale. A “Discontinued” model is not certified

Disqualified (model status) – applicant record that has been disqualified

Obsolete (model status) – model no longer in production or available for sale as a result of test failure. An obsolete model is not certified.

Inactive (Licensee status) – a licensee who is not a current applicant or participant in the AHRI Certification Program

Licensee (aka licensee name) - Name of the corporate entity on the License Agreement. A licensee may be an OEM and/or PBM in an AHRI Certification Program. A licensee is an applicant or a participant.

Licensee User – An authenticated AHRI Directory user who works for an OEM licensee. A licensee User, based on role, can manage and/or view data for the OEM licensee and, if applicable, associated PBM licensee(s).

Manufacturer name – corporate entity who owns a record. Manufacturer name is only collected for regulated products so it can be reported to applicable agencies and is not a published field in the AHRI Directory. In many cases manufacturer name will be the same as the licensee name. However, it is not required to be the same as the licensee name.

Participant – A licensee who certifies products through an AHRI Certification Program

Production stopped (model status) – model no longer in production but is still available for sale. A “Production Stopped” model is certified.

Qual (model status) – a validated applicant record stored in the Directory. A “Qual” record is not certified or published in the Directory because the applicant is still in the process of qualifying for entry into the certification program.

Role – a property of an authenticated user that determines the type of features available to the User

Authenticated User Type	Available Roles
AHRI Staff	Administrator, Certification Coordinator, Engineer
Licensee	Data Master, Data Entry, Data View Only
Subscriber	Subscriber

Unauthenticated user – any individual who goes to the Directory website and uses it without being logged into the system (i.e. public user)

Validated record – a record the system has determined includes all required data fields, and each of these fields meets requirements for expected format, range, value, and/or data type.

Functionality for Authenticated Users

Functionality	AHRI Staff Roles			Licensee Roles			Subscriber
	Administrator	Coordinator	Engineer	Data Master	Data Entry	Data View	
Setup and manage licensee profiles: <ul style="list-style-type: none"> - Convert Applicant to Participant - Licensee Agreement termination 	x						
Setup and manage Licensee profiles: <ul style="list-style-type: none"> - User Licensee association - Associate Licensee Users to programs - Licensee login locations - Licensee user login locations - Licensee user roles - Assign OEM-PBM relationships - User accounts 	x	x					
View/download Licensee Agreement information	x	x	x				
Assign/manage roles and programs to AHRI Staff and Subscribers	x						
Set up and assign programs to a subscriber	x	x					
Create Licensee's brand name list	x			x			
View/download Brand Name list	x	x	x	x	x	x	
Create Licensee's Manufacturer Name list (relevant to regulated programs)	x			x			
View/download Manufacturer Name list for a selected Licensee (relevant to regulated programs)	x			x	x	x	
Add records	x			x	x		
Edit records	x			x	x		
Manage footnotes	x						

Functionality	AHRI Staff Roles			Licensee Roles			Subscriber
	Administrator	Coordinator	Engineer	Data Master	Data Entry	Data View	
View/download published and non-published data	x	x	x	x	x	x	
Upload PDF files to AHRI	x			x	x		
View Coil Descriptor Reports	x		x	x	x	x	
Lock/unlock records	x		x				
Approve records	x		x				
Hide/unhide records	x						
Re-rate records	x		x				
Review/approve regulatory reports (CEC, DOE, EPA, NRCAN)	x						
Review/approve EPA submissions			x				
Review/upload CEC and NRCAN data	x	x					
Save and run queries of Public Directory by Subscription Program							x
Dashboard: Multiple Upload Status list	x			x	x	x	
Dashboard: List of Energy Star Submissions	x		x	x	x		
Dashboard: Daily Report of Added Records	x		x				
Dashboard: Daily Report of Modified Records	x		x				
Dashboard: List of Rerated Records that fall outside the acceptable range for ENERGY STAR fields	x		x				
Dashboard: View/download PDFs that have been uploaded by Licensees	x		x				
Dashboard: Notification of New or Terminated Applicants/Participants	x	x	x				

Logging In/Out as an Authenticated User

A user must have an AHRI account designated with directory access to log in. This is the same AHRI account and credentials required to register for AHRI Spring/Annual Meetings or to access iSTARS. After the user's AHRI account access has been created, AHRI will associate that user with a licensee(s), program(s), location(s), and assign a role. After this has been done the user will have authenticated user access to the Directory. Any user requiring an AHRI account or access should contact directorychanges@ahrinet.org.

User will only be able to access the program(s) assigned to them at the assigned role level. If the user has access to multiple programs, the user will have the same role for each of these programs.

A licensee user may hold the dual role of subscriber.

To log into the AHRI Directory:

1. Go to <https://ahridirectory.org>
2. In the upper right-hand corner of screen, click "Login."
3. Sign in with an AHRI user name and password.

At the end of the session, click the "<User Name>" at the top of the screen, and select "Log Out." For security purposes, after 15 minutes of no activity the system will automatically log the user out.

Record Management Functions for Licensee Users

Managing Brand Names

Each record, excluding characteristics records (i.e. USAC, VSMSAC, USHP, VSMSHP, VRF, ERV characteristics), must have a brand name. A list of brand name(s) must be created using the “Manage Brand” function before any product records can be created. A list of these brand names will appear in a drop down menu when a user creates new records.

Only users with the assigned role of Licensee Data Master are able to add brand names to the list. However, other licensee users (Data Entry and Data View) are able to view and download the brand name list by one of the functions to [view data as an authenticated user](#).

Brand names cannot be edited once they are created. “Brand Name” is not an editable field on records. For products with an FTC label, the brand name will appear on this label.

1. Select “Manage Brand” from the left-hand menu.
2. Select the licensee from the drop down menu.
3. Select the program from the drop down menu.
4. Select OEM or PBM. If the licensee is a PBM, select the corresponding OEM licensee.
5. Enter the brand name.
6. Click “Save.”
7. Review and accept the Terms and Conditions.
8. The new brand name is viewable as active in the “Brand Name” list and a user can now create product records with it.

The screenshot displays the 'Manage Brand' web application. On the left, a navigation menu lists various functions, with 'Manage Brand' selected and numbered 1. The main content area contains a form with several fields: 'Licensee' (2), 'Program' (3), 'As a' (4) with a dropdown menu showing 'OEM', and 'Brand' (5) with a text input field containing 'Test Brand 1'. To the right of the 'As a' field is a 'Select OEM Licensee' dropdown (4) and a 'Save' button (6). Below the form is a table with the following columns: Licensee, Program, Brand, Licensee Type, OEM Licensee, Active / Inactive, Created By, and Created Date. The table contains one row of data with the status 'Active' and 'Created By' 'TL6'.

The screenshot shows the 'Manage Brand' form in the AHRI Directory of Certified Product Performance web application. A modal window titled 'Terms & Conditions' is open, displaying the terms of the AHRI Certified Mark and claim certification program. The modal includes a red circle with the number 7, indicating a required step. The background form shows fields for Licensee, Program, and Brand, with a table listing existing brands.

Licensee	Program	Brand
		Test Brand

The screenshot shows the 'Manage Brand' form after a successful save. A green banner at the top indicates 'Brand saved successfully'. The form now includes a 'Select OEM Licensee' dropdown and a 'Save' button. A table at the bottom lists the saved brands, with a red circle and the number 8 highlighting the first row.

Licensee	Program	Brand	Licensee Type	OEM Licensee	Active / Inactive	Created By	Created Date
		Test Brand	OEM		Active	TL6	01/08/2018
		Test Brand 2	OEM		Active	TL6	01/08/2018

Managing Manufacturer Names

Manufacturer name is a required field for all regulated products. A list of manufacturer name(s) must be created, using the “Manage Manufacturer Name” function before any regulated product records can be created. A list of these manufacturer names will appear in a dropdown menu when a user creates new records.

Only users with the assigned role of Licensee Data Master are able to add manufacturer names to the list. However, other licensee users (Data Entry and Data View) are able to view and download the manufacturer name list by one of the functions to [view data as an authenticated user](#).

Manufacturer names appearing in the “Manufacturer Name” list cannot be edited. “Manufacturer Name” is not an editable field in the product record.

1. Select “Manage Manufacturer Name” from the left-hand menu.
2. Select the licensee from the drop down menu.
3. Select the program from the drop down menu.
4. Select OEM or PBM. If the licensee is a PBM, select the corresponding OEM licensee.
5. Enter the manufacturer name.
6. Click “Save.”
7. The new manufacturer name is viewable as active in the “Manufacturer Name” list and a user can now create product records with it.

The screenshot displays the 'Manage Manufacturer Name' interface. On the left, a sidebar menu lists various options, with 'Manage Manufacturer Name' highlighted and numbered 1. The main form area contains several numbered callouts: 2 points to the 'Licensee' dropdown, 3 to the 'Program' dropdown, 4 to the 'License Type' dropdown (set to 'OEM'), and 5 to the 'Manufacturer Name' text input field (containing 'Test_Manufacturer'). A 'Save' button is numbered 6. Below the form, a table lists existing manufacturer names with columns for Licensee, Program, Manufacturer Name, License Type, OEM Licensee, Active/Inactive status, Created By, and Created Date. The table shows one entry for 'Test_Manufacturer' as an active OEM licensee created by 'Admin 1' on '01/05/2015'. A 'Note' states: 'Manufacturer Name is only applicable to regulatory reported programs'. An 'Export To Excel' button is located at the bottom right of the table area.

Licensee	Program	Manufacturer Name	License Type	OEM Licensee	Active / Inactive	Created By	Created Date
		Test_Manufacturer	OEM		Active	Admin 1	01/05/2015

Manufacturer Name saved successfully

Manage Manufacturer Name

* Licensee: * Program:

* As is: OEM Select OEM License:

* Manufacturer Name: Provide Manufacturer name

Note - Manufacturer Name is only applicable to regulatory reported programs

Licensee	Program	Manufacturer Name	License Type	OEM License	Active / Inactive	Created By	Created Date
		Test_Manufacturer	OEM		Active	Admin 1	01/05/2015
		Test_Manufacturer 2	OEM		Active	TL6	01/05/2015

Export To Excel

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Managing Directory Records

Licensee users (roles: Licensee Data Masters and Licensee Data Entry) may add and edit records en masse. These records will be validated by the system to ensure they include required fields and meet format, range, value, and/or data type requirements.

Publication Delays to Certified Records

Validated new and edited records may not immediately appear on the public AHRI Directory if:

- The program requires an AHRI Certification Engineer to approve new or edited records/BMGs before they can be published.
- The program contains records that are submitted to DOE. AHRI is required to submit records to DOE before they can appear in any of the AHRI public searches on the directory. A daily overnight process runs to submit these records to DOE. Therefore, these records will appear on the public AHRI Directory following successful submission to DOE and approval from an AHRI Certification Engineer (if applicable).
- The records failed DOE submittal requirements. If licensee user does not see their new records published, they should go to Manage Directory Records > View DOE Error Report. Make appropriate corrections using the Multiple Edit template.

Even if not viewable on the public AHRI Directory yet, authenticated AHRI staff and licensee users may view validated records through the [“View/Download Licensee Data”](#) and [“View/Download OEM Data”](#) functions.

New and edited validated records that are submitted to Energy Star will appear on the AHRI Directory after successful submission to DOE and AHRI Certification Engineer approval (if applicable). However, they will not be submitted to Energy Star or appear on the CEE site until specific Energy Star approvals are

provided by AHRI staff. Once AHRI Energy Star approval is obtained for the records, they will be marked as “Is Energy Star Approved by AHRI” = Yes when viewing data as an authenticated user. The records will then be submitted to Energy Star, and with a successful submittal be published to the CEE site. Please note that “Submit to Energy Star” can initially be set to “No” when the record is created then updated to “Yes” at a later time.

Mass Upload Batch Acceptance and Upload Status Dashboard

Depending on the uploaded file size, this mass upload process can take a few seconds up to several hours.

When the user uploads a mass upload template there will be on-screen confirmation that the system has accepted (or not accepted) the batch of records for processing.

- If the system has accepted the batch for processing, a Batch ID will be assigned for the user’s reference. While the system is processing the batch, the user may continue using the system or log out.
- If the system has not accepted the batch for processing this may indicate the upload file is named incorrectly or there is a system error, in which case the user should contact AHRI.

When the system has finished processing a batch, the user will receive an email.

- If the email confirms the batch was successfully processed the user should log back into the system and view the “Mass Upload Status” on the dashboard to confirm if all records were successfully uploaded or if there were validation failures. Further details on what is included on the dashboard are below.
- If the email indicates the batch was not successfully processed it is likely the uploaded template contained unexpected data types or the template was corrupt. These errors prevented the records from undergoing the final data validation process. Verify the template observes the rules specified in “[Adding Multiple Records](#).” After making necessary corrections the file can be reloaded.

The “Multiple Upload Status” on the dashboard provides information including batch ID, licensee, location, program, the user who uploaded the file, the uploaded file name, the date and time the file was uploaded to the system, the status of the upload, how many records were successful, how many were unsuccessful, and links to download the successful and failed records.

- If any records fail, click the “Download Results” hyperlink under “Failed Records File.” This will open the file of records that failed, along with validation error messages in column B. The user, observing rules specified in “[Adding Multiple Records](#)”, should correct and upload the file again. Records that fail to pass validation are not stored in the AHRI database and are not certified.
- The “Multiple Upload Status” on the dashboard retains information on uploaded record batches for 14 calendar days, after which the information is no longer available.

The dashboard is specific to the licensee user and will not show files uploaded by other licensee users.

Adding Records

Preparing to Add Records

Before any records can be added to the system, the licensee must have a brand name list consisting of at least one brand name. If the program contains regulated reported products the licensee must also have a manufacturer list consisting of at least one manufacturer name. Products in non-regulated programs do not need a manufacturer name.

For products dependent on characteristics records (i.e. USAC, VSMSAC, USHP, VSMSHP, VRF, ERV), active characteristics record(s) must be in the database before certified records can be created.

General Notes about Adding Records

For licensees who are applicants all validated records are automatically placed in “Model Status” = Qual. These records will not appear in any of the public searches on the Directory because the Licensee is still in the process of joining the program. However, authenticated AHRI staff and licensee users may still view these records through the [“View/Download Licensee Data”](#) and [“View/Download OEM Data”](#) functions.

For licensees who are participants, upon successful validation, records are placed in “Model Status” = Active. As soon as records are validated they will immediately appear on the public AHRI Directory except in the cases noted in [“Publication Delays to Certified Records.”](#)

PBM records can only be created based on OEM participant records. AHRI must have a licensee agreement on file capturing the OEM/PBM licensee relationship. PBM records cannot be created if the associated OEM is still an applicant.

A program/brand name/model number combination can only exist one time in the AHRI database. Even if a licensee has already used a particular program/brand name/model number combination, but (regardless of reason) discontinued that record, a new record cannot be created with that combination.

Once created, it is not possible to edit the brand name, model number, or manufacturer name of a record. If the licensee needs to make changes, the record in question will need to be discontinued (with Discontinued Reason of ‘Administrative, data entry’ to identify it as invalid) and a new one created.

Adding Multiple Records

It is important for the user to observe the following when using the “Multiple Entry” function:

- When adding new records, the system can only accept data inserted into the .xlsx templates downloaded from the system or through a .txt tab delimited file containing the exact field names as shown in the .xlsx templates.
- The .xlsx templates do not appear to start at Column A. This is intentional. There are hidden columns embedded within the template which assist in the upload process. Do not unhide, edit, or erase these hidden columns. If setting up a .txt tab delimited file, it is unnecessary for you to incorporate these hidden columns in your file.
- Do not add extra columns, rearrange, or delete columns to the .xlsx template or your .txt tab delimited file.

- If editing a file that contains a column for validation errors, do not delete the column. The system will ignore this column when the file is processed.
- Do not add data beyond the last column.
- Do not add, edit, or delete data contained in the “Data” and “Brands” tabs of the file.
- For fields able to accept more than one value, separate multiple values with a semi-colon.
- Some fields contain basic validations within the cells, such as format or range validations, and will force the user to enter valid data. However, these validations are bypassed if a value is pasted into the cell. Another comprehensive validation check will occur when the file is uploaded to the system.
- Before saving and uploading the template to the system do not erase the header rows containing field names and content expectations.
- Save the upload file to the local computer or network.
 - When naming the file do not change anything before “_Template.” This ensures the program, licensee type and product type are retained and our system recognizes which validations to apply against the template.
 - Example: The template may download with the name HPPH_OEM_Template. When renaming the file after data has been added/revise, do not remove HPPH_OEM from the beginning of the file name. The user is allowed to add additional characters after HPPH_OEM (i.e. HPPH_OEM_AA_82217).

[Adding Multiple Characteristic Records](#)

This is only applicable to programs dependent on characteristics records (i.e. USAC, VSMSAC, USHP, VSMHP, VRF, ERV). At least one active characteristic records must exist in the database before a Licensee can create a new OEM certified product record.

The mass upload template can be used to add one up to several thousand characteristics to the Directory.

1. Select “Multiple Entry” from the “Manage Directory Records” drop down on the left-hand menu.
2. Select OEM from the “Licensee Type” drop down menu.
3. Type the licensee name into the “Licensee” field. This will auto generate matches that can be selected from a drop down menu.
4. Select the login location for the record to be added.
5. Select the program from the drop down menu. The “Selected Characteristics” field will auto-populate based off of this selection.
6. Click “Add.”
7. Click “Download Template.”
8. Enter the data and save the template. See “[Adding Multiple Records](#)” for general notes about using the mass upload template.
9. Click “Choose File” to locate your completed .xlsx template or .txt tab delimited file and then click “Upload Directory Data.”

AHRI CERTIFIED AHRI DIRECTORY OF CERTIFIED PRODUCT PERFORMANCE
The trusted source of performance certified heating, ventilation, air-conditioning and commercial equipment and components.

Dashboard
Manage Brand
Manage Manufacturer Name
Manage Directory Records
Single Entry
Multiple Entry
Single Edit
Multiple Edit
View Download License Data
View Download OEM Data
View Download OEM PBM
Upload a PDF
Download User Guide

Select Licensee Information

Licensee Type: OEM
Licensee:
Login Location:
NOTE: Please enter OEM licensee if licensee type selected is OEM or Please enter PBM licensee if licensee type selected is PBM.

Select Program

Program: VRF - Variable Refrigerant Flow (VRF) Air-Conditioners and Heat Pumps

Characteristics

Selected Characteristics: VRFCHARACTERISTICS

Next

6 Add

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AHRI CERTIFIED AHRI DIRECTORY OF CERTIFIED PRODUCT PERFORMANCE
The trusted source of performance certified heating, ventilation, air-conditioning and commercial equipment and components.

Dashboard
Manage Brand
Manage Manufacturer Name
Manage Directory Records
Single Entry
Multiple Entry
Single Edit
Multiple Edit
View Download License Data
View Download OEM Data
View Download OEM PBM
Upload a PDF
Download User Guide

OEM Manufacturer Information

Record Upload Type: Characteristics

Licensee Name:
Licensee Location Name:
Program Name: VRFCHARACTERISTICS - VRF Characteristics

Download Template

Choose File No file chosen Upload Directory Data

7 9

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Adding Multiple OEM or PBM Records

The mass upload template can be used to add one up to several thousand records to the Directory.

1. Select “Multiple Entry” from the “Manage Directory Records” drop down on the left-hand menu.
2. Select OEM or PBM from the “Licensee Type” drop down menu.
3. Type the licensee name into the “Licensee” field. This will auto generate matches that can be selected a drop down menu.
4. Select the login location for the record to be added.

5. Select the program from the drop down menu.
6. Click “Next.”
7. From drop down template selection: If adding data for M rating (AHRI 210/240-2017) select M Template for Coil (Mix-Match) or Systems. If adding data for M1 rating (AHRI 210/240-2023) select the M1 Template for Coil (Mix-Match) or Systems.
8. Click “Download Model DataTemplate.” See “[Adding Multiple Records](#)” for general notes about using the mass upload template. Enter the data and save the template. If the records being added are for a PBM the option of which OEM record to associate them with is within the template.
9. Click “Choose File” to locate your completed .xlsx template or .txt tab delimited file and then click “Upload Directory Data.”
10. A confirmation message including the batch ID will appear if the file has been accepted for processing. The final status of the upload can be viewed on the “Multiple Upload Status” section on the dashboard.

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Test 1

Select Licensee Information

License Type: 2 OEM

Licensee: 3 Test Licensee A

NOTE: Please enter OEM licensee if licensee type selected is OEM or Please enter PBM licensee if licensee type selected is PBM.

Login Location: 4 Test Licensee A - Test Licensee A Location

Select Program

Program: 5 USAC : Air Conditioners and Air Conditioner Coils

6 Next

Characteristics

Selected Characteristics: USACUSHP

Add

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Test 1

OEM Manufacturer Information

Record Upload Type: OEM

License Name: Test Licensee A

Licensee Location Name: Test Licensee A - Test Licensee A Location

Program Name: USAC - Air Conditioners and Air Conditioner Coils

Licensee Type: Participant

Systems - M1

Download Model Data Template 8

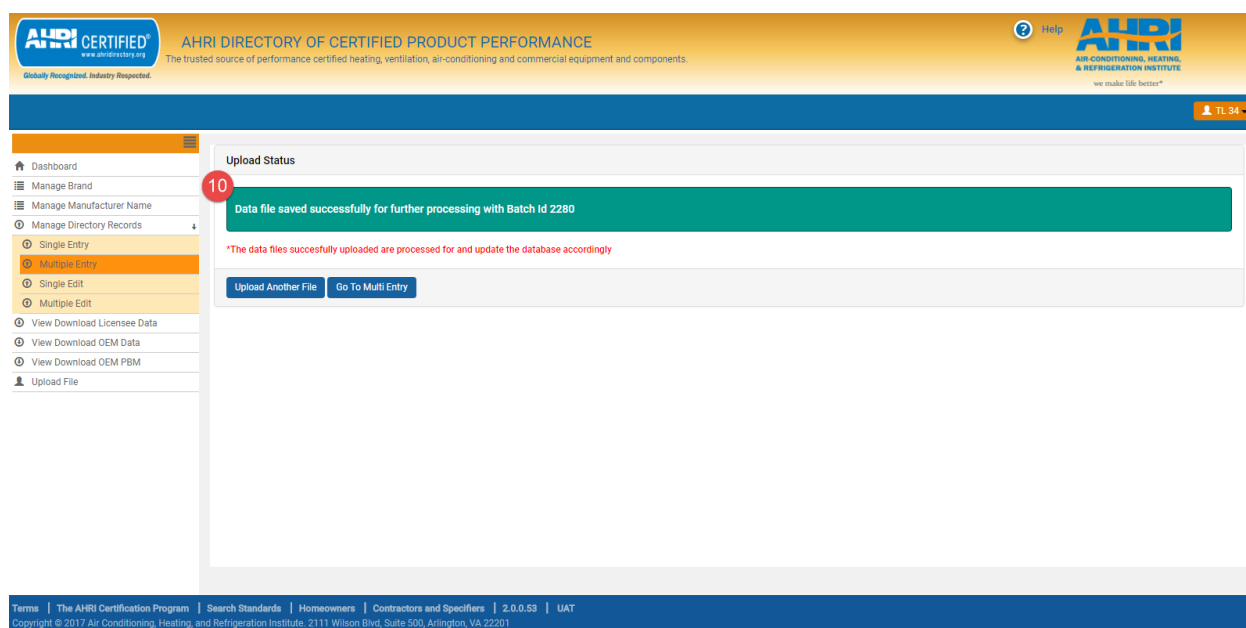
7

Choose File | No file chosen

Upload Directory Data 9

Uploaded Model Data files may contain up to 25,000 records.

* Please select respective manufacturer type for both Download / Upload



Editing Records

General Notes about Editing Records

When a participant record is locked, the only editable field is “Model Status.”

Editing Multiple Records

It is important to observe the following when using the “Multiple Edit” function:

- When editing existing records, the system can only accept data inserted into the .xlsx templates downloaded from the system. Do not change the template format. Although it is possible to copy data into the template from another source, the uploaded template must remain in the .xlsx format.
- The .xlsx templates do not appear to start at Column A. This is intentional. There are hidden columns embedded within the template which assist in the upload process. Do not unhide, edit, or erase these hidden columns. If setting up a .txt tab delimited file, it is unnecessary for you to incorporate these hidden columns in your file.
- Do not add extra columns, rearrange, or delete columns to the .xlsx template or your .txt tab delimited file.
- If editing a file that contains a column for validation errors, do not delete the column. The system will ignore this column when the file is processed.
- Do not add data beyond the last column.
- Do not add, edit, or delete data contained in the “Data” and “Brands” tabs of the file.
- For fields able to accept more than one value, separate multiple values with a semi-colon.
- Some fields contain basic validations within the cells, such as format or range validations, and will force the user to enter valid data. However, these validations are bypassed if a value is pasted

into the cell. Another comprehensive validation check will occur when the file is uploaded to the system.

- Before saving and uploading the template to the system do not erase the header rows containing field names and content expectations.
- Save the upload file to the local computer or network. The renaming of your template will be dependent if you are loading model data edits or downgrading model status.
 - For model data edits when naming the file do not change anything before “_Template.” This ensures the program, licensee type and product type are retained and our system recognizes which validations to apply against the template.
 - Example: The template may download with the name HPPH_OEM_Template. When renaming the file after data has been added/revised, do not remove HPPH_OEM from the beginning of the file name. The user is allowed to add additional characters after HPPH_OEM (i.e. HPPH_OEM_AA_82217).
 - For model status downgrades the value before “_Template” can be changed, but only to “ModelStatusDowngrade.” If the values need to be adjusted after the first portion of the file name, they can be.
 - Example: The template may download with the name HPPH_OEM_Template. When renaming the file after the model statuses have been edited it could be changed to “ModelStatusDowngrade_ED_092718.”

Editing Multiple Characteristic Records

This is only applicable to programs dependent on characteristics records (i.e. USAC, VSMSAC, USHP, VSMHP, VRF, ERV). At least one active characteristic records must exist in the database before a Licensee can create a new OEM certified product record.

The mass upload template can be used to add one up to several thousand characteristics to the Directory.

1. Select “Multiple Edit” from the “Manage Directory Records” drop down on the left-hand menu.
2. Select OEM from the “Licensee Type” drop down menu.
3. Type the licensee name into the “Licensee” field. This will auto generate matches that can be selected from a drop down menu.
4. Select the login location for the record to be added.
5. Select the program from the drop down menu. The “Selected Characteristics” field will auto-populate based off of this selection.
6. Click “Edit.”
7. Enter as much, or as little information, on the screen to pull characteristics records and click “Search.” Clicking “Clear” will remove any values input in the fields.
 - a. If no filters are designated, all records for the selected licensee/program/login location will appear.
 - b. Use the “Test Locked” = No and “Locked Under EPA Process” = No filters to avoid having non-editable records appear on your screen and subsequent template. The “Locked Under EPA Process” field is only applicable to programs containing records reported to Energy Star.

8. From this screen all of the records matching the specified search criteria will be displayed. To further refine, or alter, the search criteria click “Show Search Fields” and make any necessary adjustments.
9. To save the records click “Download Records.” This will download in the mass upload template for the program. Make any necessary updates to the record and ensure the file is saved. For general notes on using the mass upload template refer to “[Editing Multiple Records.](#)”
10. Click “Multiple Upload” to load the edited file.
 - a. If this process needs to be broken out by multiple users or multiple sessions the edited template can be loaded at a later time, but must be loaded through the “Multiple Edit” function. Do not attempt to load an edit template through the “Multiple Entry” function.
11. Click “Choose File” to locate your edited .xlsx template and then click “Upload Directory Data.”
12. A confirmation message including the batch ID will appear if the file has been accepted for processing. The final status of the upload can be viewed on the “Multiple Upload Status” section on the dashboard.

The screenshot displays the AHRI Directory of Certified Product Performance user interface for licensees. The interface is divided into a sidebar menu on the left and a main content area. The sidebar menu includes options such as Dashboard, Manage Brand, Manage Manufacturer Name, Manage Directory Records, Single Entry, Multiple Entry, Single Edit, Multiple Edit (highlighted with a red circle 1), View Download Licensee Data, View Download OEM Data, View Download OEM PBM, Upload a PDF, and Download User Guide. The main content area is titled "Select Licensee Information" and contains several sections: "Licensee Type" (with a dropdown menu showing "OEM" and a red circle 2), "Licensee" (with a text input field and a red circle 3), "Login Location" (with a dropdown menu and a red circle 4), "Select Program" (with a dropdown menu showing "USAC : Air Conditioners and Air Conditioner Coils" and a red circle 5), and "Characteristics" (with a text input field showing "USACUSHIP" and a red circle 6). A "Next" button is located at the bottom right of the "Select Program" section. The footer of the page includes links to Terms, The AHRI Certification Program, Search Standards, Homeowners, Contractors and Specifiers, Z50.78, and UAT, along with copyright information for 2018 Air Conditioning, Heating, and Refrigeration Institute.

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Empty Data

Dashboard
Manage Brand
Manage Manufacturer Name
Manage Directory Records
Single Entry
Multiple Entry
Single Edit
Multiple Edit
View Download License Data
View Download OEM Data
View Download OEM PBM
Upload a PDF
Download User Guide

OEM Manufacturer Information
Record Upload Type : Characteristics

License Name : License Location Name :
Program Name : VMSACVSMSP - VMSAC VSMSP Characteristic

Download Template

Choose File No file chosen Upload Directory Data

Note: Record field(s) values which are not editable by user will be ignored during upload

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Empty Data

Dashboard
Manage Brand
Manage Manufacturer Name
Manage Directory Records
Single Entry
Multiple Entry
Single Edit
Multiple Edit
View Download License Data
View Download OEM Data
View Download OEM PBM
Upload a PDF
Download User Guide

Upload Status

Data file saved successfully for further processing with Batch Id 445

The data file is being processed, to check the status of this upload, go to Dashboard, Multiple Upload Status. An email will be sent to you when the file has completed.

Upload Another File Go to Multi Entry

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Editing Multiple OEM or PBM Records

1. Select “Multiple Edit” from the “Manage Directory Records” drop down on the left-hand menu.
2. Select OEM or PBM from the “Licensee Type” drop down menu.
3. Type the licensee name into the “Licensee” field. This will auto generate matches that can be selected from a drop down menu.
4. Select the login location for the record to be added.
5. Select the program from the drop down menu.
6. Click “Edit.”

7. Enter as much, or as little information, on the screen to pull records and click “Search.” To pull all records in the program, leave the fields blank and click “Search.” Clicking “Clear” will remove any values input in the fields.
 - a. If no filters are designated, all records for the selected licensee/program/login location will appear.
 - b. Use the “Test Locked” = No and “Locked Under EPA Process” = No filters to avoid having non-editable records appear on your screen and subsequent template. The “Locked Under EPA Process” field is only applicable to programs containing records reported to ENERGY STAR.
8. From this screen all of the records matching the specified search criteria will be displayed. To further refine, or alter, the search criteria click “Show Search Fields” and make any necessary adjustments.
9. To save the records click “Download Records.” This will download in the mass upload template for the program. Make any necessary updates to the record and ensure the file is saved. For general notes on using the mass upload template refer to [“Editing Multiple Records.”](#)
 - a. If the mass upload template contains records that won’t be edited delete those rows from the template.
11. Click “Multiple Upload” to load the edited file.
 - a. If this process needs to be broken out by multiple users or multiple sessions the edited template can be loaded at a later time, but must be loaded through the “Multiple Edit” function. Do not attempt to load an edit template through the “Multiple Entry” function.
10. Click “Choose File” to locate your edited .xlsx template and then click “Upload Directory Data.”
11. A confirmation message including the batch ID will appear if the file has been accepted for processing. The final status of the upload can be viewed on the “Multiple Upload Status” section on the dashboard.

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Dashboard

Manage Brand

Manage Manufacturer Name

Manage Directory Records

Single Entry

Multiple Edit (1)

Single Edit

Multiple Edit

View Download License Data

View Download OEM Data

View Download OEM PSM

Upload a PDF

Download User Guide

Select Licensee Information

License Type: (2) OEM

Licensee: (3)

NOTE: Please enter OEM licensee if licensee type selected is OEM or Please enter PSM licensee if licensee type selected is PSM

Login Location: (4)

Select Program

Program: (5) CWH - Commercial Water Heaters

Characteristics

Selected Characteristics: (6) Add

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Empty Data

Dashboard

Manage Brand

Manage Manufacturer Name

Manage Directory Records

Single Entry

Multiple Entry

Single Edit

Multiple Edit

View Download License Data

View Download OEM Data

View Download OEM PBM

Upload a PDF

Download User Guide

OEM Manufacturer Information

Record Upload Type : Characteristics

License Name : [Redacted]

License Location Name : [Redacted]

Program Name : VMSACVSMSP - VMSAC VSMSP Characteristic

Download Template

Choose File | No file chosen | Upload Directory Data

Note: Record field(s) values which are not editable by user will be ignored during upload

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Empty Data

Dashboard

Manage Brand

Manage Manufacturer Name

Manage Directory Records

Single Entry

Multiple Entry

Single Edit

Multiple Edit

View Download License Data

View Download OEM Data

View Download OEM PBM

Upload a PDF

Download User Guide

Upload Status

Data file saved successfully for further processing with Batch Id 445

*The data file is being processed, to check the status of this upload, go to Dashboard, Multiple Upload Status. An email will be sent to you when the file has completed.

Upload Another File | Go to Multi Entry

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Editing Multiple OEM and PBM Model Statuses

OEM and PBM model statuses can be downgraded from active to production stopped and production stopped to discontinued without the system needing to run validations on the actual model data and performance ratings only by using the 'Status Downgrade Template'. The "Multiple Edit" function allows the system to bypass model data validation to downgrade the model status using that template. If using the Multiple Edit template, records must meet current validation rules. Models cannot be directly downgraded from active to discontinued.

1. Select “Multiple Edit” from the “Manage Directory Records” drop down on the left-hand menu.
2. Select OEM or PBM from the “Licensee Type” drop down menu.
3. Type the licensee name into the “Licensee” field. This will auto generate matches that can be selected from a drop down menu.
4. Select the login location for the record to be added.
5. Select the program from the drop down menu.
6. Click “Next.” If you have a list of reference numbers that you want to update please see the steps below. If you need to pull a grouping of models based off certain criteria, proceed to the next step.
 - a. There is no need to define search criteria if a list of reference numbers is already on hand, click “Search” then scroll up if necessary to click “Multiple Upload” in order to get to the screen with the download template.
 - b. Click “Download Status Downgrade Template” to download the template, populate the reference numbers and choose the appropriate model statuses to downgrade. If production stopped models are moving to discontinued ensure that the discontinued reason is populated in the template. When saving the file do not edit the file name before “_template.”
 - c. Reference the details under step seven to understand the constraints for updating model statuses.
 - d. Proceed to step 11.
7. Enter as much, or as little information, on the screen to pull records and click “Search.” Clicking “Clear” will remove any values input in the fields. Please note the below details on constraints for updating model statuses.
 - a. If no filters are designated, all records for the selected licensee/program/login location will appear. This is not ideal for downgrading model statuses, as some scenarios will prevent a model from being able to be downgraded.
 - i. Use the “Locked Under EPA Process” = No to filter out models that are currently undergoing ENERGY STAR approval. This field is only applicable to programs containing records reported to ENERGY STAR.
 - b. Even if the model is under test lock the model status can be downgraded.
 - c. PBMs will automatically inherit the OEM’s model status, there is no need to include these in the template. The system has been setup to identify the associations and update the models accordingly. However, an OEM will not inherit the model status of a PBM.
 - d. If a basic model is being discontinued then all of the models associated with that model need to be associated with another basic model prior to the discontinuation. If this is not done the system will fail the model status downgrade and provide an error message providing directions to update other models.
8. From this screen all of the records matching the specified search criteria will be displayed. To further refine, or alter, the search criteria click “Show Search Fields” and make any necessary adjustments.
9. To edit existing data for M rating (AHRI 210/240-2017) select **M Template** radio button. To edit data that has already been added in M1(AHRI 210/240-2023) or if you want to add ratings to existing (M) records that don’t have M1 ratings, select the **M1 Template** radio button.

10. To save the records click “Download Records.” This will download in the mass upload template for the program. Make any necessary updates to the records and **ensure the file is renamed to “ModelStatusDowngrade <user chosen value>.”** If production stopped models are moving to discontinued ensure that the discontinued reason is populated in the template. For general notes on using the mass upload template refer to [“Editing Multiple Records.”](#)
 - a. If the mass upload template contains records that won’t be edited delete those rows from the template.
11. Click “Multiple Upload” to load the edited file.
 - b. If this process needs to be broken out by multiple users or multiple sessions the edited template can be loaded at a later time, but must be loaded through the “Multiple Edit” function. Do not attempt to load an edit template through the “Multiple Entry” function.
12. Click “Choose File” to locate your edited .xlsx template and then click “Upload Directory Data.”
13. A confirmation message including the batch ID will appear if the file has been accepted for processing. The final status of the upload can be viewed on the “Multiple Upload Status” section on the dashboard.

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Test

Dashboard
Manage Brand
Manage Manufacturer Name
Manage Directory Records
Multiple Entry
View SASO Records
View DOE Error Report
View Download Licensee Data
View Download OEM Data
View Download OEM PBM
Upload a PDF
Coil Descriptor Report
Download User Guide
Download Release Notes

Select Licensee Information

License Type : Please Select

License : Search Licensee

Login Location : Please Select

NOTE: Please enter OEM licensee if licensee type selected is OEM or Please enter PBM licensee if licensee type selected is PBM.

Select Program

Program : Please Select

Characteristics

Selected Characteristics :

Edit

Next

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Test 1

- Dashboard
- Manage Brand
- Manage Manufacturer Name
- Manage Directory Records
- View Download Licensee Data
- View Download OEM Data
- View Download OEM PBM
- Upload a PDF
- Call Descriptor Report
- Download User Guide
- Download Release Notes

Licensee Name: Test Licensee A

License Location Name: Test Licensee A - Test Licensee A Location

Program Name: Air Conditioners and Air Conditioner Coils

Licensee Type: Participant

Multiple Edit - Search for records to edit

Air Conditioners and Air Conditioner Coils

AHRI Certified Reference Number

Manufacturer Type

Outdoor Unit Model Number (Condenser or Single Package)

Furnace Model Number

Series Name

EER (A2) - Single or High Stage (95F)

Sold in?

Test Locked

Outdoor Unit Brand Name

Systems

Min Max

Canada
Outside USA and Canada
USA

Note: Hold Ctrl to select Multiple Values

NO PREFERENCE

Note: Test locked records cannot be edited, other than to downgrade model status. Any changes to data fields will be ignored.

Select Outdoor Unit Brand Name

Model Status

Indoor Unit Model Number (Evaporator and/or Air Handler)

AHRI Type

Cooling Capacity (A2) - Single or High Stage (95F)

SEER

Designated Tested Combination

Locked Under EPA Process

Indoor Unit Brand Name

--Select Model Status

--Select AHRI Type

Min Max

Min Max

--Select Designated Tested Combination

NO PREFERENCE

Select Indoor Unit Brand Name

Clear Search

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Test 1

- Manage Brand
- Manage Manufacturer Name
- Manage Directory Records
- View Download Licensee Data
- View Download OEM Data
- View Download OEM PBM
- Upload a PDF
- Call Descriptor Report
- Download User Guide
- Download Release Notes

Licensee Name: Test Licensee A

License Location Name: Test Licensee A - Test Licensee A Location

Program Name: Air Conditioners and Air Conditioner Coils

Licensee Type: Participant

9

10 Download Records Multiple Upload 11

8 Show Search Fields

Download template will contain first 100000 records matching multiple edit search criteria.

AHRI Certified Reference Number	Model Status	Manufacturer Type	Brand Name	AHRI Type	Type of Air Conditioner or Heat Pump Associated with the Minimum External Static Pressure Used in Testing or Rating	Series Name	Manufacturer Name	Is Basic Model?	Basic Model Number	Outdoor Unit Model Number (Condenser or Single Package)	Indoor Unit Model Number (Evaporator and/or Air Handler)	Furnace Model Number	Rating Conditions	International Rating Conditions to be Certified	Alt SA Re Po
205725951	Production Stopped	Systems	TEST BRAND VP801	RC-A		TESTUSAC	Yes		SAMPLETEST(2)	EVAP3			AHRI Rating Conditions		
205767637	Production Stopped	Systems	TEST BRAND 001	RCU-A-C		TEST LICA	Yes		USAC_CON	EVAP3			AHRI Rating Conditions		

The screenshot shows the 'OEM Manufacturer Information' page. The top navigation bar is blue with the AHRI logo and the text 'AHRI DIRECTORY OF CERTIFIED PRODUCT PERFORMANCE'. A user profile icon is in the top right. A left sidebar contains a menu with options like 'Dashboard', 'Manage Brand', 'Manage Manufacturer Name', 'Manage Directory Records', and 'Multiple Entry'. The main content area has a form for 'OEM Manufacturer Information' with fields for 'Licensee Name', 'License Location Name', 'Program Name', and 'Licensee Type'. Below the form are buttons for 'Download Model Data Template' and 'Download Status Downgrade Template'. A 'Choose File' button is highlighted with a red circle and the number 12. Below the buttons, there is text indicating that uploaded model data files may contain up to 25,000 records and model status downgrade files may contain up to 50,000 records. A note at the bottom states: 'Note: Record field(s) values which are not editable by user will be ignored during upload.'

The screenshot shows the 'Upload Status' page. The top navigation bar is blue with the AHRI logo and the text 'AHRI DIRECTORY OF CERTIFIED PRODUCT PERFORMANCE'. A user profile icon is in the top right. A left sidebar contains a menu with options like 'Dashboard', 'Manage Brand', 'Manage Manufacturer Name', 'Manage Directory Records', and 'Multiple Entry'. The main content area has a green banner with the text 'Data file saved successfully for further processing with batch id 445'. Below the banner, there is a red text message: 'The data file is being processed, to check the status of this upload, go to Dashboard, Multiple Upload Status. An email will be sent to you when the file has completed.' Below the message are buttons for 'Upload Another File' and 'Go To Multi Entry'.

Other Features for Licensee Users

Licensee users may:

- [DOE Errors](#): to see models that errored in DOE process and needs manufacturer action to correct
- [Upload PDF files to AHRI](#): for DOE submissions, private test reports and any other files needed
- [Submit records to Energy Star \(if applicable\)](#)
- [View data as an authenticated user](#): view and download licensee data, OEM and OEM/PBM data
- [View and download coil descriptor reports \(for USAC and USHP programs only\)](#)

DOE Errors

1. A licensee may see what models have failed the DOE process through the “View DOE Error Report” function. Only one program can be downloaded at a time. If there are errors in multiple programs, then each step must be repeated for each program. Select “View DOE Error Report” from the left-hand menu
2. Select a program from the drop down menu
3. Select the licensee from the drop down menu.
4. Select the login location from the drop down menu. (for multiple login locations, press and hold CTRL key and click on the individual login locations)
5. Click on “Export” button.

Uploading PDF Files to AHRI

A licensee may upload supplemental PDFs for DOE and private test reports for qualification/new BMG/model approval through the “Upload a PDF” function. Only a single PDF file can be uploaded at a time. If multiple PDFs need to be associated with a particular record, then each step has to be repeated for each PDF.


Uploaded files can be viewed in the “Files Uploaded to AHRI” function on the main dashboard. The view of files uploaded is specific to the licensee user and will not show files uploaded by other licensee users.

1. Select “Upload a PDF” from the left-hand menu.
2. Select a program from the drop down menu.
3. Select the licensee from the drop down menu.
4. Select the login location from the drop down menu.
5. Select the type of PDF from the drop down menu:
 - a. DOE submissions: This is for federally regulated programs that require a supplemental pdf as required by Subpart B of 10 CFR Part 429. If necessary to run a valid test, the equipment-specific supplemental information must include any additional testing and testing set up instructions (e.g., specific operational or control codes or settings) which would be necessary to operate the basic model under the required conditions specified by the relevant test procedure. Upon selecting this type, additional fields will appear where associated models can be indicated by various input or through search. The system is designed to pull all models of the associated program, licensee and login location. Results can be refined further by reference number and model status.
 - i. Reference number: This field is where the AHRI reference number/s can be entered for the models that need to be associated with the PDFs. For inputting multiple reference numbers use a comma, pipe lines or enter the reference numbers in separate lines. *This is a required field for a successful search.*

- ii. Model status: This field is where models can be searched for by their model status. One, some or all available statuses can be selected. *This is not a required field for a successful search, but will provide more specific results.*
 - iii. Display information by: This selection determines if search results are shown by either model number or reference number. After the selection is chosen, click “Search.”
 - iv. Models: After the search has been initiated this field will show as a drop down, once clicked in, with the option to select models to associate with the uploaded PDF.
- b. Other
 - c. Private test reports for qualification/new BMG/model approval
6. Click “Choose File” to search your computer for the desired PDF. Ensure the file size is less than 15 MB.
 7. Add a description of the uploaded PDF.
 8. Click “Upload File.” The screen will show a message of “File uploaded successfully” if the file successfully saved to the system. The file can now be viewed by AHRI.

The screenshot displays the 'Manage Upload' interface within the AHRI Directory of Certified Product Performance. The left sidebar contains a navigation menu with options like 'Dashboard', 'Manage Brand', 'Manage Manufacturer Name', 'Manage Directory Records', 'View Download License Data', 'View Download OEM Data', 'Upload User Guide' (highlighted with a red circle 1), and 'Download User Guide'. The main form area is titled 'Manage Upload' and contains several dropdown menus: 'Program' (highlighted with a red circle 2), 'Licensee' (highlighted with a red circle 3), 'Login Location' (highlighted with a red circle 4), 'PDF Type' (highlighted with a red circle 5), and 'Upload' (highlighted with a red circle 6). The 'Upload' field shows a 'Choose File' button and the text 'No file chosen'. Below these is a large text area for 'Description' (highlighted with a red circle 7). At the bottom of the form are two buttons: 'Upload File' (highlighted with a red circle 8) and 'Cancel'.

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User Guide



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Test Access59

Dashboard

Manage Brand

Manage Manufacturer Name

Manage Directory Records

View Download License Data

View Download OEM Data

View Download OEM PEM

Upload a PDF

Download User Guide

Program : *

CWH - Commercial Water Heaters

Licensee : *

Test Licensee B

Login Location : *

Test Licensee B - Arlington, VA

PDF Type : *

DOE Submissions (this is a dropdown menu option only for commercial programs, in which the Licensee participates, reported to DOE)

Reference Number

5 a.i.

Tips: - Utilize the areas to the left to select your models. It will default to providing all models associated with the manufacturer and certification programs selected in the drop-downs that are a valid model status.
- The search box above allows you to paste a list of multiple reference numbers to display in the area to the left. Reference numbers can be input separated by commas, pipe or separate lines. Once you paste the number(s), click apply, and you can click the box next to 'Models' to select all.

Model Status:

Active ☐ Production Stopped ☐ Obsolete ☐ Discontinued

Display information by:

Model Number ☐ Reference Number ☒ Search 5 a.ii.

Models *

5 a.iv.

Upload : *

Choose File | No file chosen

Description : *

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Submitting Records to Energy Star

Process for Submitting Records to ENERGY STAR: ACIM, CBLR, DGX, RBLR, RFRN, RWH, ULE, VRF and WSHP

Records that are created and successfully uploaded with “Submit to Energy Star” = Yes will still require further actions to proceed through the submittal process. If AHRI finds any issues with the records, or their associated test report/s, they will be rejected and a notification will be sent outside of the Directory. After the necessary adjustments have been made the submission process will need to be followed starting from the beginning.

Please note the below steps are directly related to submission of newly certified ENERGY STAR models. Any modifications or withdrawals will automatically proceed through the process without any further need from the manufacturer.

1. After successfully creating or editing the record/s to submit to Energy Star, proceed to the “Energy Star Transmissions(s)” function on the dashboard.
2. Select the applicable program from the “EPA Program” drop down list. Please note that WSHP is broken out by application points.
3. Select the applicable status from the “EPA Status” drop down list and click search to initiate the query, it will not be an automatic pull. Please note that a description of each status is included under the “Action item” section on the page, but details are included below as well.
 - a. Missing Supporting Documentation: Supporting documentation must be uploaded as part of a new ENERGY STAR submission. Click on the upload button to complete the task. PBM models will inherit the documentation uploaded for their corresponding OEM model. Models that have been rejected due to documentation will also fall back into this queue.
 - i. When “Upload Link” is clicked the next screen will auto-populate the program, licensee, login location and PDF type based on the current credentials for the logged in user.
 - ii. There is an option to associate the PDF with just a single model or multiple models. Select all applicable models for the PDF in the “EPA Models” drop down. Please note that for WSHP there will be two separate entries (each with the same AHRI reference number) to associate a PDF, one for each application point.
 - iii. Click “Choose Files” to select a file to upload. Multiple Excel spreadsheets and PDFs can be uploaded but please combine into one file if possible. Ensure the combined file size is less than 10 MB. If an incorrect file is selected click “Choose Files” again and select the correct file and this will remove what was previously selected to upload.
 - iv. Populate the “Description” information and then click “Upload File” to complete the upload of the PDF. There will be an on screen message confirming the file upload was successful. If an incorrect file is uploaded it can be replaced by repeating the upload process.
 - b. Ready to be approved by the Engineer: This indicates models have their necessary supporting documentation and are pending an AHRI engineer’s review and approval. Further details on the records, including access to the PDF submitted with the model, is available through the “View” link under the “Transaction Detail” column.

- c. Rejected by Engineer: The submission has been rejected by the AHRI engineer. Further details on the rejection can be viewed in the “View” link associated with the submission, as well as through communications outside of the Directory with the AHRI engineer.
- d. Pending to be reported to EPA: The submission has been approved by the AHRI engineer and is pending submission to EPA. An update as to whether the submission passed EPA validations will be available within 24 hours.
- e. Rejected by EPA: The submission has been rejected by EPA. Further details on the rejection can be viewed in the “View” link associated with the submission.
- f. Approved by EPA: The submission has been approved by EPA and will be published on the ENERGY STAR site within 24 – 48 hours.

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Test 1

Dashboard

- Manage Brand
- Manage Manufacturer Name
- Manage Directory Records
- View Download Licensee Data
- View Download OEM Data
- View Download OEM PBM
- Upload a PDF
- Coil Descriptor Report
- Download User Guide
- Download Release Notes

Dashboard

Multiple Upload Status

EPA Submission(s)

1 Energy Star Transmission(s) - WSHP **NEW**

EPA Program: **2** WSHP GLHP

EPA Status: **3** Missing Supporting Documentation

Action Item:
The licensee must upload supporting documentation as part of your ENERGY STAR submission. Click on the upload button to complete the task. PBM models will inherit the documentation uploaded for their corresponding OEM.

Show 250 entries

Transaction Detail	EPA Program Name	Reference Id	OEM/PBM	Company	Location	EPA Submission Date	EPA Withdrawn Date	Transaction Type	Transaction Reason	Transaction Status	Upload Link
No results found matching your search criteria.											

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- View Download OEM PBM
- Upload a PDF
- Coil Descriptor Report
- Download User Guide
- Download Release Notes

EPA Submission(s)

Energy Star Transmission(s) - WSHP **NEW**

EPA Program: WSHP GLHP

EPA Status: Missing Supporting Documentation


Action Item:
The licensee must upload supporting documentation as part of your ENERGY STAR submission. Click on the upload button to complete the task. PBM models will inherit the documentation uploaded for their corresponding OEM.

Show 250 entries

Transaction Detail	EPA Program Name	Reference Id	OEM/PBM	Company	Location	EPA Submission Date	EPA Withdrawn Date	Transaction Type	Transaction Reason	Transaction Status	Upload Link
View	WSHP GLHP		OEM			12/17/2018 13:00:14		Certification Withdrawn	Manufacturer Voluntary Withdrawal	Missing Supporting Documentation	Upload Link
View	WSHP GLHP		OEM			12/17/2018 13:00:14		Certification Withdrawn	Manufacturer Voluntary Withdrawal	Missing Supporting Documentation	Upload Link
View	WSHP GLHP		OEM			12/17/2018 13:00:13		Certification Withdrawn	Manufacturer Voluntary Withdrawal	Missing Supporting Documentation	Upload Link

Showing 1 to 42 of 42 entries (filtered from 141 total entries)

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Dashboard

Manage Brand

Manage Manufacturer Name

Manage Directory Records

View Download Licensee Data

View Download OEM Data

View Download OEM PEM

Upload a PDF

Coil Descriptor Report

Download User Guide

Download Release Notes

Manage Upload

Program :

Licensee :

Login Location :

PDF Type :

EPA Models :

Upload :

Description :

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Dashboard

- Manage Brand
- Manage Manufacturer Name
- Manage Directory Records
- View Download Licensee Data
- View Download OEM Data
- View Download OEM PBM
- Upload a PDF
- Coll Descriptor Report
- Download User Guide
- Download Release Notes

EPA Program:

EPA Status:

[Search](#)

Action Item:

The licensee must upload supporting documentation as part of your ENERGY STAR submission. Click on the upload button to complete the task. PBM models will inherit the documentation uploaded for their corresponding OEM.

3 b

Show: 250 entries

Multi Select	Transaction Detail	EPA Program Name	Reference Id	OEM/PBM	Company	Location	EPA Submission Date	EPA Withdrawn Date	Transaction Type	Transaction Reason	Transaction Status
NA	View	WSHP GLHP		OEM					Initial Certification	Model Meets ENERGY STAR Requirements	Ready to be approved by Engineer
NA	View	WSHP GLHP		OEM					Initial Certification	Model Meets ENERGY STAR Requirements	Ready to be approved by Engineer
NA	View	WSHP GLHP		OEM					Initial Certification	Model Meets ENERGY STAR Requirements	Ready to be approved by Engineer

Showing 1 to 10 of 10 entries (filtered from 141 total entries)

[Files Uploaded to AHRI](#)

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Dashboard

- Manage Brand
- Manage Manufacturer Name
- Manage Directory Records
- View Download Licensee Data
- View Download OEM Data
- View Download OEM PBM
- Upload a PDF
- Coll Descriptor Report
- Download User Guide
- Download Release Notes

Manage Energy Star Transactions

[Back to Dashboard](#)

General Information:

EPA Program Id	EPA Program Name	Directory Program Name	Reference Id	EPA Submission Date	EPA Withdrawn Date	Creation Date
1	WSHP GLHP	WSHP	201910082			12/11/2018 14:30:59

Previous transactions generated:

Transaction Type	Transaction Reason	Transaction Status	EPA Token	EPA Response	EPA Last Response Message	Comments
Initial Certification	Model Meets ENERGY STAR Requirements	Rejected by EPA		Rejected due to validation error	Error at line 41, column 69 the value has 2 fractional digits, where scale must be within 1, the document is NOT valid	Multi Approval Process: Approved to be submitted to ENERGY STAR on 12/11/2018 by Test Admin

New transaction to approved:

View Data	Transaction Type	Transaction Reason	Transaction Status	Documentation
Q	Initial Certification	Model Meets ENERGY STAR Requirements	Ready to be approved by Engineer	Blank Testing.pdf (1).pdf

3 b

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- Manage Directory Records
- View Download Licensee Data
- View Download OEM Data
- View Download OEM PBM
- Upload a PDF
- Coil Descriptor Report
- Download User Guide
- Download Release Notes

EPA Submission(s)

Energy Star Transmission(s) - WSHHP NEW

EPA Program:

EPA Status:

[Search](#)

Action Item:

The ENERGY STAR submission has been rejected by the engineer. Please click on the "View Detail" link for further information.

Show 250 entries

Transaction Detail	EPA Program Name	Reference Id	OEM/PBM	Company	Location	EPA Submission Date	EPA Withdrawn Date	Transaction Type	Transaction Reason	Transaction Status
View	WSHP GLHP		OEM					Initial Certification	Model Meets ENERGY STAR Requirements	Rejected by Engineer

Showing 1 to 1 of 1 entries (Filtered from 141 total entries)

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Dashboard

- Manage Brand
- Manage Manufacturer Name
- Manage Directory Records
- View Download Licensee Data
- View Download OEM Data
- View Download OEM PBM
- Upload a PDF
- Coil Descriptor Report
- Download User Guide
- Download Release Notes

Manage Energy Star Transactions

[Back to Dashboard](#)

General Information:

EPA Program Id	EPA Program Name	Directory Program Name	Reference Id	EPA Submission Date	EPA Withdrawn Date	Creation Date
1	WSHP GLHP	WSHP				12/11/2018 14:30:59

Previous transactions generated:

Transaction Type	Transaction Reason	Transaction Status	EPA Token	EPA Response	EPA Last Response Message	Comments
Initial Certification	Model Meets ENERGY STAR Requirements	Rejected by Engineer				

Previous transactions generated:

Transaction Type	Transaction Reason	Transaction Status	EPA Token	EPA Response	EPA Last Response Message	Comments
Initial Certification	Model Meets ENERGY STAR Requirements	Rejected by EPA		Rejected due to validation error	Error at line 41, column 69 the value has 2 fractional digits, where scale must be within 1, the document is NOT valid.	Multi Approval Process: Approved to be submitted to ENERGY STAR on 12/11/2018 by Test Admin

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Dashboard

- Manage Brand
- Manage Manufacturer Name
- Manage Directory Records
- View Download Licensee Data
- View Download OEM Data
- View Download OEM PBM
- Upload a PDF
- Coil Descriptor Report
- Download User Guide
- Download Release Notes

EPA Submission(s)

Energy Star Transmission(s) - WSHP NEW

EPA Program:

EPA Status:

3d [Search](#)

Action Item:

The ENERGY STAR submission is scheduled to be reported to EPA. Please allow 24 hours to receive an updated status.

Show 250 entries

Transaction Detail	EPA Program Name	Reference Id	OEM/PBM	Company	Location	EPA Submission Date	EPA Withdrawn Date	Transaction Type	Transaction Reason	Transaction Status
View	WSHP GLHP		OEM					Initial Certification	Model Meets ENERGY STAR Requirements	Pending to be reported to EPA
View	WSHP GLHP		OEM					Initial Certification	Model Meets ENERGY STAR Requirements	Pending to be reported to EPA

Showing 1 to 2 of 2 entries (filtered from 141 total entries)

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Dashboard

- Manage Brand
- Manage Manufacturer Name
- Manage Directory Records
- View Download Licensee Data
- View Download OEM Data
- View Download OEM PBM
- Upload a PDF
- Coil Descriptor Report
- Download User Guide
- Download Release Notes

EPA Submission(s)

Energy Star Transmission(s) - WSHP NEW

EPA Program:

EPA Status:

3e [Search](#)

Action Item:

The ENERGY STAR submission has been rejected. Please click on the "View Detail" link for further information.

Show 250 entries

Transaction Detail	EPA Program Name	Reference Id	OEM/PBM	Company	Location	EPA Submission Date	EPA Withdrawn Date	Transaction Type	Transaction Reason	Transaction Status
View	WSHP GLHP		OEM			01/30/2019 17:00:11		Initial Certification	Model Meets ENERGY STAR Requirements	Rejected by EPA
View	WSHP GLHP		OEM			01/30/2019 17:00:11		Initial Certification	Model Meets ENERGY STAR Requirements	Rejected by EPA
View	WSHP GLHP		OEM					Initial Certification	Model Meets ENERGY STAR Requirements	Rejected by EPA
View	WSHP GLHP		OEM					Initial Certification	Model Meets ENERGY STAR Requirements	Rejected by EPA

Showing 1 to 7 of 7 entries (filtered from 141 total entries)

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Manage Energy Star Transactions

[Back to Dashboard](#)

General Information:

EPA Program Id	EPA Program Name	Directory Program Name	Reference Id	EPA Submission Date	EPA Withdrawn Date	Creation Date
1	WSHP GLHP	WSHP	20191085			12/11/2018 14:31:02

Previous transactions generated:

Transaction Type	Transaction Reason	Transaction Status	EPA Token	EPA Response	EPA Last Response Message	Comments
Initial Certification	Model Meets ENERGY STAR Requirements	Rejected by EPA		Rejected due to validation error	Error at line 41, column 64 the value is out of the range (min/inclusive specifies 16), the document is NOT valid.	Multiple Approval Process: Approved to be submitted to ENERGY STAR on 02/28/2019 by Engineer 1

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EPA Submission(s)

Energy Star Transmission(s) - WSHP NEW

EPA Program:

EPA Status:

[Search](#)

Action Item:
The ENERGY STAR submission was reported successfully. Please allow 24-48 hours for the model(s) to be visible on the Product Finder.

3 f

Transaction Detail	EPA Program Name	Reference Id	OEM/FBI	Company	Location	EPA Submission Date	EPA Withdrawn Date	Transaction Type	Transaction Reason	Transaction Status
View	WSHP GLHP		OEM			12/17/2018 13:00:14		Initial Certification	Model Meets ENERGY STAR Requirements	Approved by EPA
View	WSHP GLHP		OEM			12/17/2018 13:00:14		Initial Certification	Model Meets ENERGY STAR Requirements	Approved by EPA
View	WSHP GLHP		OEM			12/17/2018 13:00:13		Initial Certification	Model Meets ENERGY STAR Requirements	Approved by EPA
View	WSHP GLHP		OEM			12/17/2018 13:00:12		Initial Certification	Model Meets ENERGY STAR Requirements	Approved by EPA

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Process for Submitting Records to ENERGY STAR: USAC, USHP, VSMSAC and VSMSHP

Records that are created and successfully uploaded with “Submit to Energy Star” = Yes will still require further actions to proceed through the submittal process. If AHRI finds any issues with the records they will be rejected and a notification will be sent outside of the Directory. After the necessary adjustments have been made the submission process will need to be followed starting from the beginning.

Please note the below steps are directly related to submission of newly certified ENERGY STAR models. Any modifications or withdrawals will automatically proceed through the process without any further need from the manufacturer.

1. After successfully creating or editing the record/s to submit to Energy Star, proceed to the “Energy Star – Unitary Small Programs” function on the dashboard.
2. Select the applicable program from the “EPA Program” drop down list.
3. Select the applicable licensee from the “Licensee” drop down list.
4. Select the applicable status from the “EPA Status” drop down list and click search to initiate the query, it will not be an automatic pull.
 - a. Pending to be approved by the Engineer: This indicates models meet the current ENERGY STAR specifications and are pending an AHRI engineer’s review and approval. Further details on the records in this batch are available by clicking the select box and then clicking the “Export” button.
 - b. Approved by Engineer: The submission was approved by the AHRI engineer and is marked on the CEE page as ENERGY STAR labeled. Further details on the records in this batch are available by clicking the select box and then clicking the “Export” button.
 - c. Rejected by Engineer: The submission has been rejected by the AHRI engineer. Further details on the rejection can be viewed in the “Comments” section of the dashboard, as well as through communications outside of the Directory with the AHRI engineer. As with the other status functions, further details on the records in this batch are available by clicking the select box and then clicking the “Export” button.
 - d. Withdrawn from EPA: The models previously labeled as ENERGY STAR are no longer labeled as such. This applies to models that have been edited as Submit to Energy Star = No or whose ratings have been edited or rerated to below the ENERGY STAR minimums. Further details on the records in this batch are available by clicking the select box and then clicking the “Export” button.

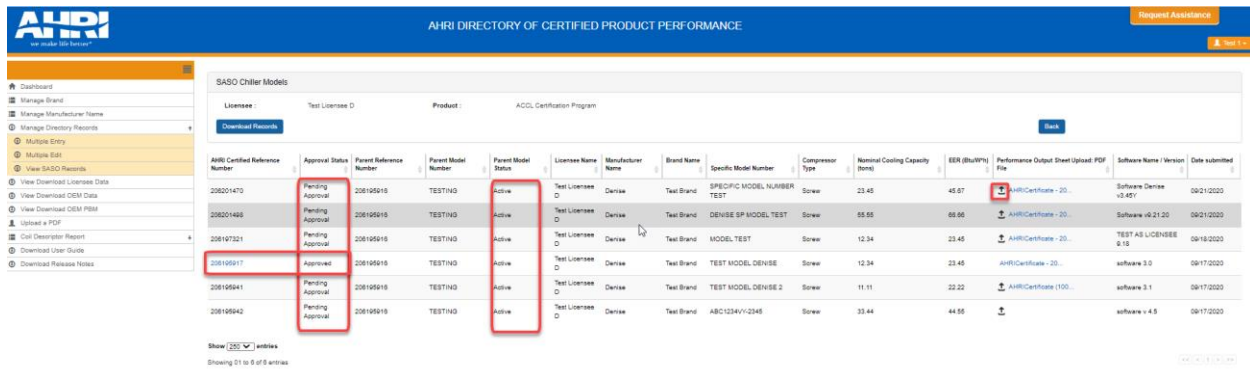
The screenshot shows the AHRI Directory of Certified Product Performance web application. The top navigation bar includes the AHRI logo, the title 'AHRI DIRECTORY OF CERTIFIED PRODUCT PERFORMANCE', and a 'Request Assistance' button. The sidebar on the left contains a 'Dashboard' section with a 'NEW!' badge and a list of navigation links: 'Manage Brand', 'Manage Manufacturer Name', 'Manage Directory Records', 'View Download Licensee Data', 'View Download OEM Data', 'View Download OEM PBM', 'Upload a PDF', 'Cool Descriptor Report', 'Download User Guide', and 'Download Release Notes'. The main content area is titled 'Energy Star - Unitary Small AC Program' and features a search form with four numbered red circles indicating the steps: 1. Select the program (USAC), 2. Select the licensee (USAC), 3. Select the EPA status (Pending to be approved by Engineer), and 4. Click the 'Search' button. Below the search form is a table with columns: 'Multi Select', 'Company', 'Location', 'EMD id', 'EPA Organization id', 'OEM / PBM', 'Created Date', 'Modified By', 'Modified Date', and 'Comment'. The table displays 85 entries, with the first five rows visible. The bottom of the page includes a footer with links to 'Terms', 'The AHRI Certification Program', 'Search Standards', 'Homeowners', 'Contractors and Specifiers', and '1.40.00 | UAT'. The copyright notice is 'Copyright © 2019 Air Conditioning, Heating, and Refrigeration Institute, 2311 Wilson Blvd, Suite 400'.

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4C

Products from the Chiller family (ACCL, WCCL) which are imported into Saudi Arabia require a special approval process in order to obtain the AHRI Certificate of Product Ratings. Specific build ratings, in addition to a software output sheet, must be reviewed by AHRI staff prior to providing approval. You will be notified of the status of your submission by both an automated nightly email and a feature nested under “Manage Directory Records” called “View SASO Records”; the latter is also where you can download the Certificate for approved models which are still in “Active” or “Production Stopped” status. Please follow the steps below:

1. Using the “Multiple Entry” feature for submitting records, select “SASO” program and download the model data template to populate with your SASO-specific model information
 - a. Note: “Parent model” is the ACCL or WCCL model upon which this record is based
2. Confirm the record was processed successfully by checking the “Multiple Upload” feature on your Dashboard
3. Once record entry is successful, Open the “Manage Directory Records” tab to find “View SASO Records” and select this option
4. Enter the Licensee for this model and select either ACCL or WCCL as appropriate
5. On the next screen you will see a table of all SASO records which meet the above criteria, and the most recent entry should be at the top
6. On the given row, select the Upload File Icon to attach your software output sheet as a PDF
 - a. Note all other fields besides the file selection are populated based on the values in the SASO record you submitted; the Description field is optional
7. After you’ve attached the file, you will return to the View SASO Records table and see that the file was attached
 - a. Note you may upload a different file until the SASO record has been approved by AHRI by repeating step 6 (above)
8. This record is now in “Pending Approval” status and will be in AHRI’s queue for review
 - a. If AHRI approves the record, the status will change to “Approved” and you may now download your Certificate by clicking the AHRI Reference Number which will now be a blue link in the “View SASO Records” table
 - b. If AHRI rejects the record, you will also get comments from the AHRI Engineer as to what specifically is the problem that needs to be rectified
9. If you need to make edits to the SASO submission, you may do so using the “Multiple Edit” feature under Manage Directory records
 - a. Note records are editable until they are approved by AHRI, and then they are locked
10. You will receive a daily email indicating the change of status of your SASO submissions and any comments input by AHRI



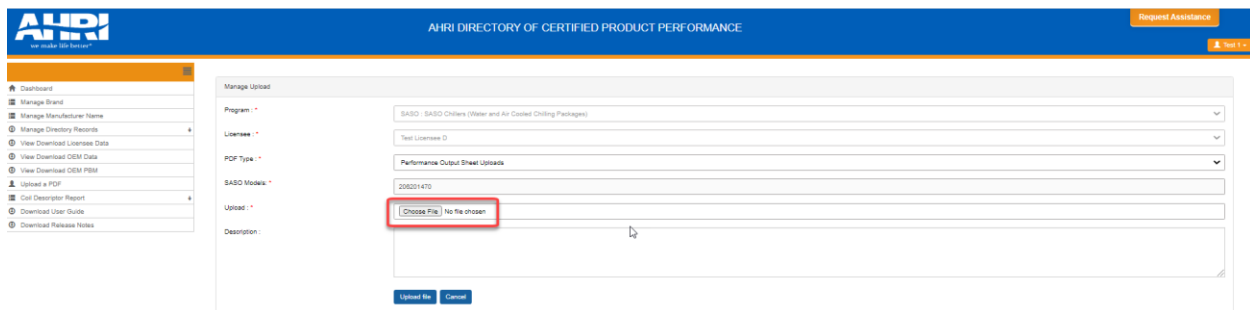
SASO Chiller Models

Licensee: Test Licensee D Product: ACCL Certification Program

Download Records

AHRI Certified Reference Number	Approval Status	Parent Reference Number	Parent Model Number	Parent Model Status	Licensee Name	Manufacturer Name	Brand Name	Specific Model Number	Compressor Type	Nominal Cooling Capacity (Tons)	EER (Btu/Wp)	Performance Output Sheet Upload: PDF	Software Name / Version	Date submitted
208201470	Pending Approval	208195916	TESTING	Active	Test Licensee D	Device	Test Brand	SPECIFIC MODEL NUMBER TEST	Screw	23.45	45.97	AHRI Certificate - 20...	Software Device v3.401	08/21/2020
208201488	Pending Approval	208195916	TESTING	Active	Test Licensee D	Device	Test Brand	DENSE SP MODEL TEST	Screw	55.55	65.66	AHRI Certificate - 20...	Software v8.21.20	08/21/2020
208197321	Pending Approval	208195916	TESTING	Active	Test Licensee D	Device	Test Brand	MODEL TEST	Screw	12.34	23.45	AHRI Certificate - 20...	TEST AS LICENSEE 8.19	08/18/2020
208195917	Approved	208195916	TESTING	Active	Test Licensee D	Device	Test Brand	TEST MODEL DENSE	Screw	12.34	23.45	AHRI Certificate - 20...	software 3.0	08/17/2020
208195941	Pending Approval	208195916	TESTING	Active	Test Licensee D	Device	Test Brand	TEST MODEL DENSE 2	Screw	11.11	22.22	AHRI Certificate (100...	software 3.1	08/17/2020
208195942	Pending Approval	208195916	TESTING	Active	Test Licensee D	Device	Test Brand	ABC1234567890	Screw	33.44	44.55		software v 4.5	08/17/2020

Show 250 entries
Showing 01 to 6 of 6 entries



Manage Upload

Program: SASO SASO Chillers (Water and Air Cooled Chilling Packages)

Licensee: Test Licensee D

PDF Type: Performance Output Sheet Uploads

SASO Models: 208201470

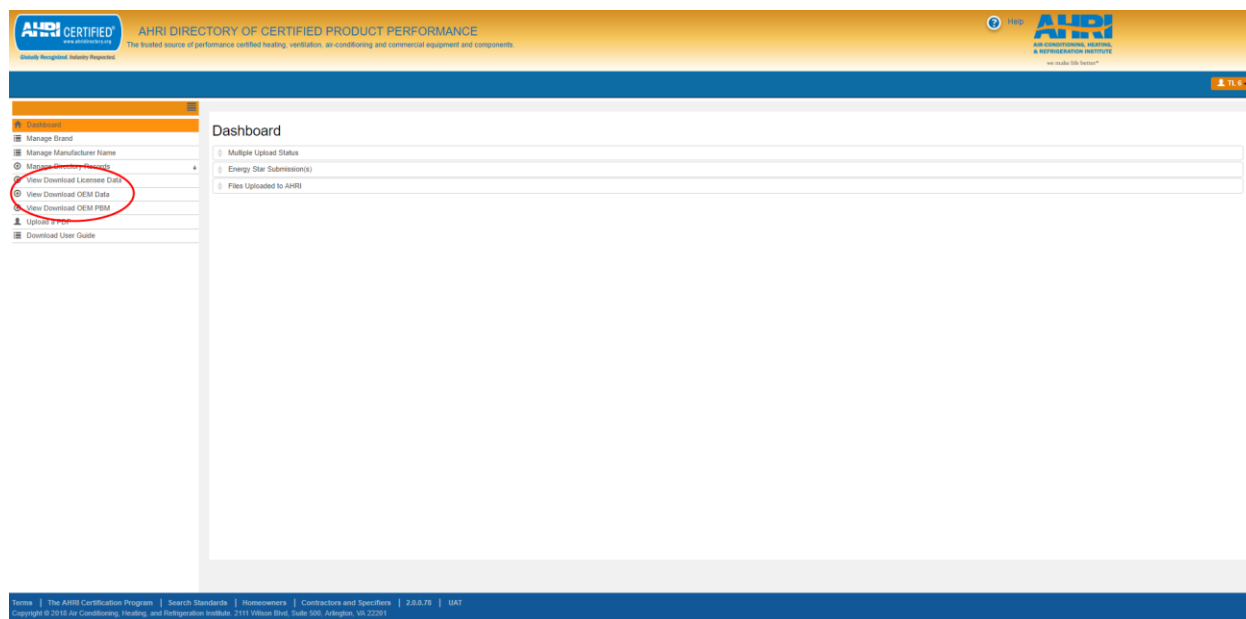
Upload: Choose File No file chosen

Description:

Upload File Cancel

Viewing Data as an Authenticated User

The Directory offers multiple functions to allow licensees and AHRI staff users, based on their program permissions, to create customized views of licensee data. These features give the user access to more fields than those shown on the public directory. The features are accessed from the menu on the left-hand side of the screen.



View and Download Licensee Data

The “View Download Licensee Data” feature allows a user to view and download records stored in the database based on the program, licensee type (OEM or PBM), licensee, login location, brand(s) and model status(es) selected by the user. This feature allows the user to query one licensee’s records at a time, specific to login location.

1. Select “View Download Licensee Data” in the left-hand menu.
2. Select the program from the drop down menu.
3. Select the licensee type from the drop down menu.
4. Select the licensee from the drop down menu.
5. Select the login location from the drop down menu.
6. Select one, some or all brand(s) from the drop down menu.
7. Select one, some or all model status(es) from the drop down menu.
8. In the “Available Fields” select as many, or as few, data points to search on.
 - a. A single data point can be moved to “Selected Fields” by selecting it and clicking the single right arrow.
 - b. Multiple data points can be moved to “Selected Fields” by using CTRL while selecting the points and then clicking the single right arrow.
 - c. All data points can be moved to “Searchable Fields” by clicking the double right arrow.
9. The data points in “Selected Fields” can be rearranged by using the up and down buttons to the right.
 - a. A single data point can be removed from “Selected Fields” by selecting it and clicking the single left arrow.
 - b. Multiple data points can be removed from “Selected Fields” by using CTRL while selecting the points and then clicking the single left arrow.
 - c. All data points can be removed from “Searchable Fields” by clicking the double left arrow.
10. To run the search without further refining the search criteria click “View Results.”

11. To further refine the search criteria, click “Refine Search Criteria”. From that screen, range specifications can be defined along with other model details. To initiate the search click “View Results” or to clear the field values click “Clear.”

a. This function can also be accessed after the initial search by clicking on the “Refined Search” tab.

12. Search results can be downloaded by clicking “Export Search Results.”

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View/Download License Data

Program: CWH - Commercial Water Heaters
License Type: OEM
Licensee: Aeon, Inc.
Log/Location: Tulsa, OK
Brand: Test_Brand
Status: All selected

Available Fields
AHRI Certified Reference Number
Model Status
Brand Name
Test Locked
Serial In?
Manufacturer Name
Model Number
Basic Model Number
Basic Model Group Id
Energy Source

Selected Fields

Refine Search Criteria
View Results

Refined Search
Result

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Refined Search

AHRI Certified Reference Number
Energy Source: --Select Energy Source
Rated Volume (gal): Min Max
Input Rate (MBtu/h): Min Max
Thermal Efficiency (%): Min Max
Standby Loss (Btu/h): Min Max
Is Related: NO PREFERENCE
Locked Under EPA Process: NO PREFERENCE

Model Number
Heater Type: --Select Heater Type
Measured Volume (gal): Min Max
Input Rate (Btu/h): Min Max
Standby Loss (%/hour): Min Max
Hot Water Supply Boiler: Yes No Clear
Test Locked: NO PREFERENCE

Clear View Results

Result

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The screenshot displays the AHRI Certified website's 'View Download OEM Data' interface. On the left, a sidebar menu lists various navigation options, with 'View Download OEM Data' highlighted. The main content area features a search results table. A red circle highlights the 'View Download OEM Data' link in the sidebar. Another red circle highlights the 'Export Search Results' button. The table has multiple columns for product details and performance metrics. The first row of data is visible, showing a single record. The bottom of the page includes a footer with terms, search standards, and copyright information.

View and Download OEM Data

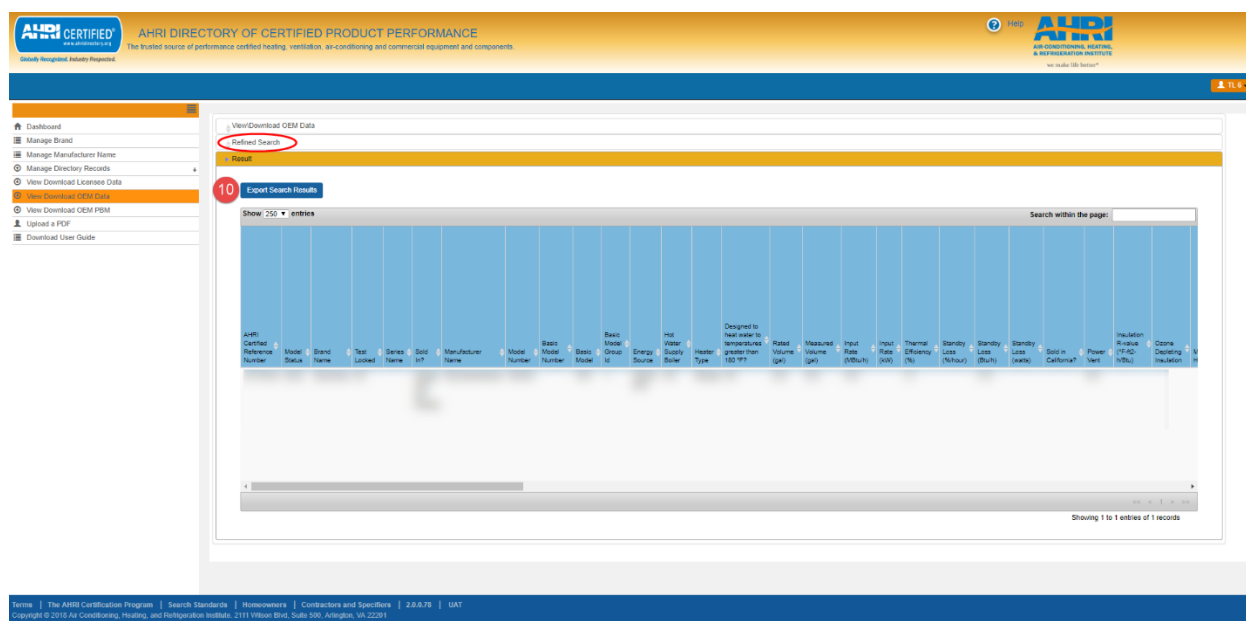
The “View Download OEM Data” feature allows a user to view and download OEM records stored in the database based on the program, licensee(s), brand(s) and model status(es) selected by the user. This feature allows the user to query one, some, or all OEM licensees (based on permissions) and does not base the results on login location. This will be helpful to licensees who are examining their BMGs and to AHRI staff making test selections.

1. Select “View Download OEM Data” in the left-hand menu.
2. Select the program from the drop down menu.
3. Select one, some or all licensee(s).
4. Select one, some or all brand(s).
5. Select one, some or all model status(es).
6. In the “Available Fields” select as many, or as few, data points to search on.
 - a. A single data point can be moved to “Selected Fields” by selecting it and clicking the single right arrow.
 - b. Multiple data points can be moved to “Selected Fields” by using CTRL while selecting the points and then clicking the single right arrow.
 - c. All data points can be moved to “Searchable Fields” by clicking the double right arrow.
7. The data points in “Selected Fields” can be rearranged by using the up and down buttons to the right.
 - a. A single data point can be removed from “Selected Fields” by selecting it and clicking the single left arrow.
 - b. Multiple data points can be removed from “Selected Fields” by using CTRL while selecting the points and then clicking the single left arrow.
 - c. All data points can be removed from “Searchable Fields” by clicking the double left arrow.
8. To run the search without further refining the search criteria click “View Results.”

9. To further refine the search criteria, click “Refine Search Criteria”. From that screen, range specifications can be defined along with other model details. To initiate the search click “View Results” or to clear the field values click “Clear.”
 - a. This function can also be accessed after the initial search by clicking on the “Refined Search” tab.
 - b. Be aware that selecting a brand name on this screen may override the multiple brand names selected on the previous screen. For USAC or USHP ICM licensees, the “Outdoor Unit Brand Name” filter may be helpful.
10. Search results can be downloaded by clicking “Export Search Results.”

The screenshot shows the AHRI Directory of Certified Product Performance interface. The sidebar on the left contains navigation links: Dashboard, Manage Brand, Manage Manufacturer Name, Manage Directory Records, View Download Licensee Data, View Download OEM Data (highlighted with a red circle 1), View Download OEM PBM, Upload a PDF, and Download User Guide. The main content area is titled 'View/Download OEM Data'. It features a 'Refined Search' section with dropdown menus for Program (Commercial Water Heaters), Licensee (Aaan, Inc.), Brand (Test Brand), and Status (Active). To the right is an 'Available Fields' list with items like AHRI Certified Reference Number, Model Status, Brand Name, Test Locked, Series Name, Size (in), Manufacturer Name, Model Number, and Basic Model Number. A 'Selected Fields' list is also present. At the bottom right, there are buttons for 'Refine Search Criteria' (9) and 'View Results' (8). A 'Result' section is visible at the bottom.

The screenshot shows the 'Refined Search' section of the AHRI Directory of Certified Product Performance interface. It includes a sidebar with navigation links: Dashboard, Manage Brand, Manage Manufacturer Name, Manage Directory Records, View Download Licensee Data, View Download OEM Data (highlighted with a red circle 1), View Download OEM PBM, Upload a PDF, and Download User Guide. The main content area is titled 'Refined Search'. It features a 'Refined Search' section with various input fields and dropdown menus for filtering search results. Fields include AHRI Certified Reference Number, Energy Source (with a dropdown for 'Select Energy Source'), Model Number, Heater Type (with a dropdown for 'Select Heater Type'), Rated Volume (gall), Measured Volume (gall), Input Rate (MBtu/h), Input Rate (Btu/h), Thermal Efficiency (%), Standby Loss (%/hour), Standby Loss (Btu/h), Hot Water Supply Boiler (Yes/No), and Test Locked (NO PREFERENCE). At the bottom right, there is a 'View Results' button (9) and a 'Clear' button.



View and Download OEM PBM Data

The “View Download OEM PBM” feature allows a user to view and download the correlation between OEM and PBM records, or vice versa, based on the selected program, model status(es), type of licensee and licensee.

Viewing PBM Records Related to an OEM Licensee

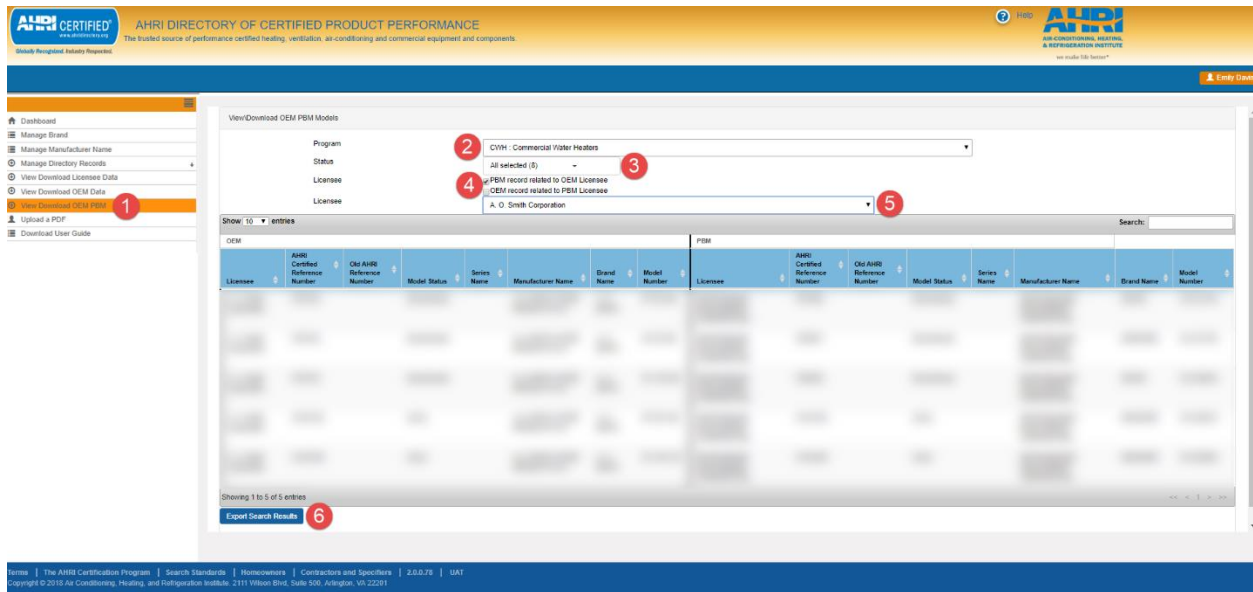
This function will show all the selected OEM licensee’s records with their corresponding PBM records.

1. Select “View Download OEM PBM” from the left-hand menu.
2. Select the program from the drop down menu.
3. Select one, some or all model status(es).
4. Select “PBM record related to OEM Licensee.”
5. Select the OEM licensee from the drop down menu.
6. Search results can be downloaded by clicking “Export Search Results.”

Viewing OEM Records Related to a PBM Licensee

This function will show all the selected PBM licensee’s records with their corresponding OEM records.

1. Select “View Download OEM PBM” from the left-hand menu.
2. Select the program from the drop down menu.
3. Select one, some or all model status(es).
4. Select “OEM record related to PBM Licensee.”
5. Select the PBM licensee from the drop down menu.
6. Search results can be downloaded by clicking “Export Search Results.”



View and Download Coil Descriptor Reports (for USAC and USHP programs only)

This function is available to licensee's that are associated with USAC and/or USHP programs.

1. Select either "USAC" or "USHP" from the "Coil Descriptor Report" drop down in the left-hand menu.
2. Select either "Systems" or "Coil (Mix-Match)" from the "Manufacturer Type" drop down.
3. Enter as much, or as little, information into the search fields
4. Click "Export to Excel."
5. An onscreen message will display stating "Depending on your search criteria and Internet connection speed, this report may take several minutes to generate. The report will generate as a compressed .csv file. If you are using an older version of Excel (2003 or earlier), any records beyond 65,535 rows will be dropped from your downloaded file. If you are using a more recent version of Excel (2007 and beyond) to open the file, any records beyond 1,048,575 rows will be dropped from your downloaded file. In both instances, please consider using a text editor application to open the file to avoid dropping records. Do you want to continue?" Click "Continue" to proceed with the download.

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User Guide

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Test Engineer

Dashboard

View Agreement

Lock / Unlock Records

Manage Disciplinary Mode

Approve Records

ReRate Record

View Download License Data

View Download OEM Data

View Download OEM PBM

Coil Descriptor Report

USAC

USHP

Coil Descriptor Report - USAC

2

Manufacturer Type

Model Status

Phase

Outdoor Unit Brand Name

Indoor Unit Brand Name

Furnace Model Number

EER (A2) - Single or High Stage (95F)

SEER

Sold in?

Note - Hold Ctrl to select Multiple Values.

Eligible For Federal Tax Credit (installed between Feb 17,2009 and Dec 31,2016)

3

AHRI Certified Reference Number

AHRI Type

Series Name

Outdoor Unit Model Number (Condenser or Single Package)

Indoor Unit Model Number (Evaporator and/or Air Handler)

Cooling Capacity (A2) - Single or High Stage (95F) btuh

IEER

Highest Sales Volume Tested Combination

Region

Is Rerated

4

Clear

Export to Excel

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ReRate Record

View Download License Data

View Download OEM Data

View Download OEM PBM

Coil Descriptor Report

Coil Descriptor Report - USAC

5

Warning

Depending on your search criteria and internet connection speed, this report may take several minutes to generate. The report will generate as a compressed .csv file. If you are using an older version of Excel (2003 or earlier), any records beyond 65,535 rows will be dropped from your downloaded file. If you are using a more recent version of Excel (2007 and beyond) to open the file, any records beyond 1,048,575 rows will be dropped from your downloaded file. In both instances, please consider using a text editor application to open the file to avoid dropping records. Do you want to continue?

Cancel

Continue

AHRI Certified Reference Number

AHRI Type

Series Name

Outdoor Unit Model Number (Condenser or Single Package)

Indoor Unit Model Number (Evaporator and/or Air Handler)

Cooling Capacity (A2) - Single or High Stage (95F) btuh

IEER

Highest Sales Volume Tested Combination

Region

Is Rerated

Clear

Export to Excel

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