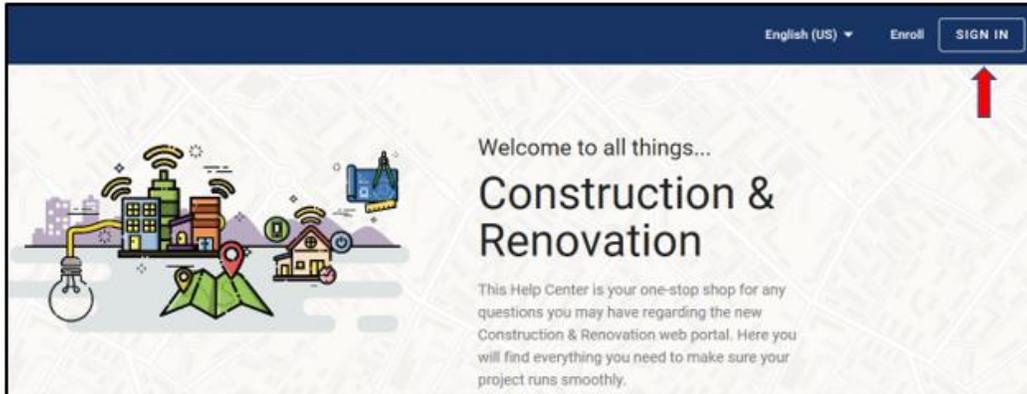
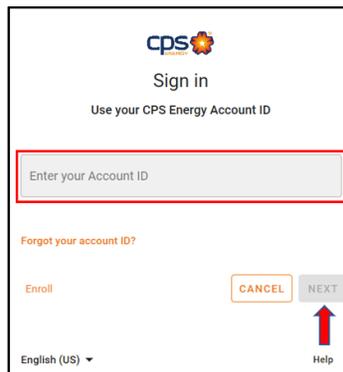


# ATTACH A DOCUMENT TO YOUR PROJECT

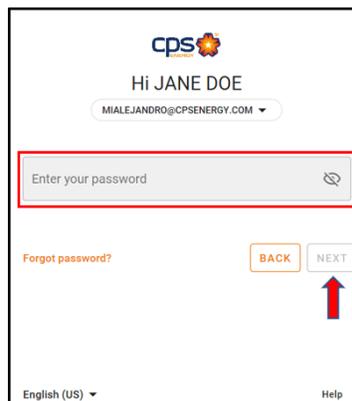
1. Open your internet web browser.
2. In the address bar, type in <https://secure.cpsenergy.com/crportal/#/>
3. Click **SIGN IN** located in the top right corner of the page.



4. Enter your **Account ID** and click **NEXT**.

A screenshot of the CPS Energy 'Sign in' page. The page has the CPS Energy logo at the top. Below the logo, it says 'Sign in' and 'Use your CPS Energy Account ID'. There is a text input field with the placeholder text 'Enter your Account ID', which is highlighted with a red border. Below the input field, there is a link for 'Forgot your account ID?'. At the bottom, there are 'Enroll', 'CANCEL', and 'NEXT' buttons. A red arrow points to the 'NEXT' button. There is also a 'Help' link at the bottom right.

5. Enter your **password** and click **NEXT**.

A screenshot of the CPS Energy password entry page. The page shows the user is logged in as 'Hi JANE DOE' with the email 'MIALE.JANDRO@CPSENERGY.COM'. There is a text input field with the placeholder text 'Enter your password', which is highlighted with a red border. Below the input field, there is a link for 'Forgot password?'. At the bottom, there are 'BACK' and 'NEXT' buttons. A red arrow points to the 'NEXT' button. There is also a 'Help' link at the bottom right.

6. Select the project you want to add a document to under a company/user.

Projects

There are a total of 0 projects available

How to find your projects?

Start Date: 2020-12-09 | End Date: 2021-01-06 | Status: Open

Check users to retrieve their projects in search results

SCOTTY GREEN: 22578 |  PEGGY J SCOTT: 22577

Check All | Uncheck All

Search

PEGGY J SCOTT (Click to view the projects for this account)

SAIFUL H SARKAR (Click to view the projects for this account)

BUILDING HOME (Click to close)

Residential Service - New Accelerated  
**Testing for script**  
123 Happy Street SAN ANTONIO, TX 78210

Application Pending #108568

7. If you would like to attach a file to a project, click the **project card**.

PRIMARY ACTIVITIES

The details displayed on the actions, comments, files and permits tabs represents the specifics on the project.

Project Number #108568 | Project Status Application Pending | Customer Project requiring action

8. If you would like to attach a file to a work request, click a **work request (WR) card**.

WR #102855  
SMRAU - SERV METER RES  
AC - UG

Requesting  
Work Request Status ⓘ

0  
Work Request tasks  
requiring action

11/04/2019  
Estimated Completion

WR #102854  
NRSMG - SERV/MET RES -  
GAS

Requesting  
Work Request Status ⓘ

0  
Work Request tasks  
requiring action

12/06/2019  
Estimated Completion



**Please Note:**

**A green checkmark appears in the top right corner of whichever card is currently selected.**

**\*\* All cards and options are specific to the object with the green checkmark. \*\***

9. Beneath the project and work request cards, you will find a menu bar with multiple options. Click **ATTACHMENTS** on the menu.
10. Click **Select a file to be uploaded** in the text box, to the right of the **paperclip** icon. Once you have chosen your file and clicked **Open**, in the file navigation window, click **Upload File**.

GENERAL      TASKS      COMMENTS      PERMITS      **ATTACHMENTS**

1 FILES FOR PROJECT

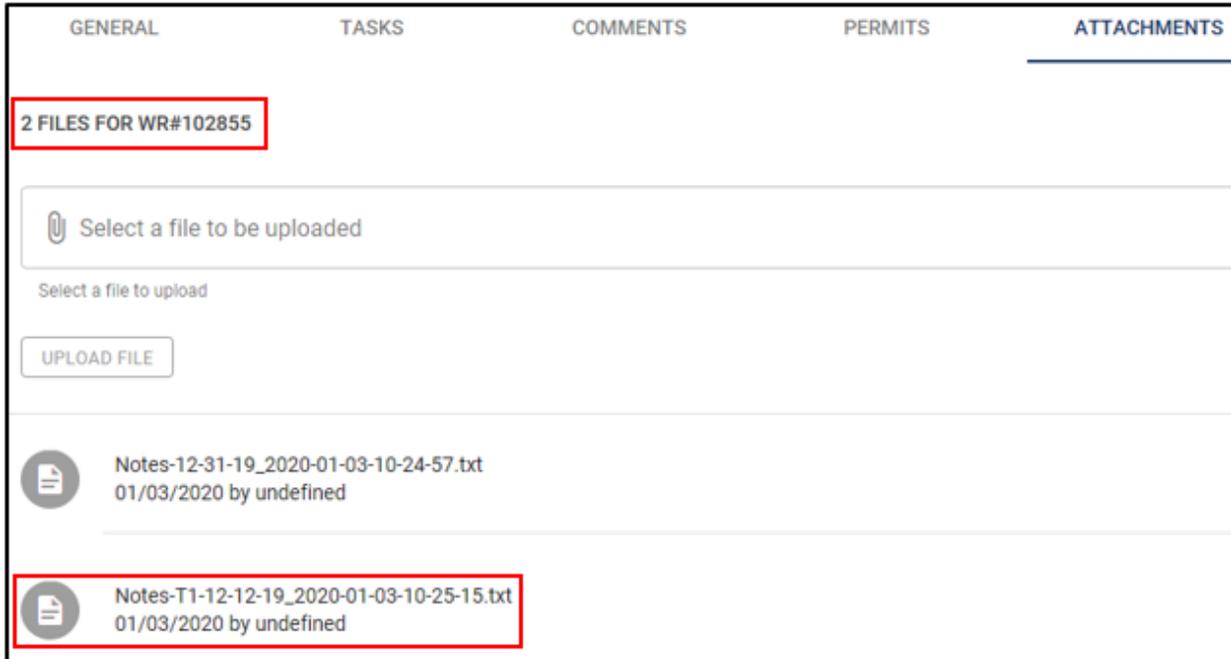
 Select a file to be uploaded

Select a file to upload

UPLOAD FILE

 Notes-11-30-19\_2019-12-05-07-36-12.docx  
12/05/2019 by Jane Doe

11. Once the upload is complete, notice the **FILES FOR** number was incremented (from 1 to 2 in this example) and the file information appears below the **UPLOAD FILE** button. This may take a few seconds to complete.



12. To access a document which has been uploaded, click on the document and select from the **Open**, **Save**, **Save as**, or **Cancel** options in the dialog box (**Save as** is accessed by clicking the **Up-Arrow** . next to **Save**).

