



CPS ENERGY

**Construction & Renovation
Web Portal User Guide**

August 2019

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TABLE OF CONTENTS

Section 1: Construction & Renovation Web Portal Objectives	3
Section 2: Web Portal Access	4
2.1 Initiate Registration through Web Portal	4
2.2 Subcontractor Authorization	5
Section 3: Getting Started in Web Portal	6
Section 4: Creating Projects in Web Portal	7
4.1 Key Categories to Create Project	7
4.2 Project Type Selection	7
4.3 Single-Family Home Project Examples	8
4.3.1 Temporary Service	9
4.3.2 Permanent Service	13
4.4 Multi-Family Complex Project	17
4.5 Commercial/Industrial Project	19
4.6 Residential Subdivision Project	22
4.7 Customer Assistance Project	24
Section 5: Managing Project Data in the Web Portal	26
5.1 How to Search for Projects to Update	26
5.2 Project / Work Request Icons (for mobile view)	27
5.3 Updating Work Request Tasks	27
5.4 Gas Inspection Process	28
Section 6: Customer Options	30
6.1 Requesting New Account/New Address	30
6.2 Additional Information Features	30
6.2.1 Comments	30
6.2.2 Documents	31
6.2.3 Contacts	31
Section 7: Customer Engineering Assistance	32
Section 8: Customer Profile User Update	33

Section 1: Construction & Renovation Web Portal Objectives

CPS Energy continues to engage in process and system initiatives to better serve our customers. The ***Construction & Renovation Web Portal*** has been developed to improve communication between our customers and their Designers regarding the requirements and status of their projects. Customers have 24/7 visibility and the ability to create projects, update work request tasks or to review schedules. Communication has also been improved as email notifications are dispatched as the status of specific project-work tasks are updated.

CPS Energy is committed in pursuing excellence in customer service and in adding value to our customers. We welcome your feedback in making our service better. Please email CSIFeedback@cpsenergy.com or call 210-353-2450 to leave your comments or suggestions.

Section 2: Web Portal Access

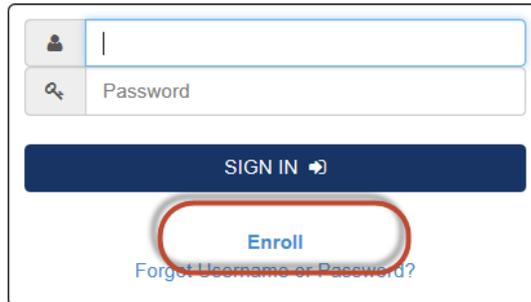
2.1 Initiate Registration through Web Portal

1. Link to the Web Portal:

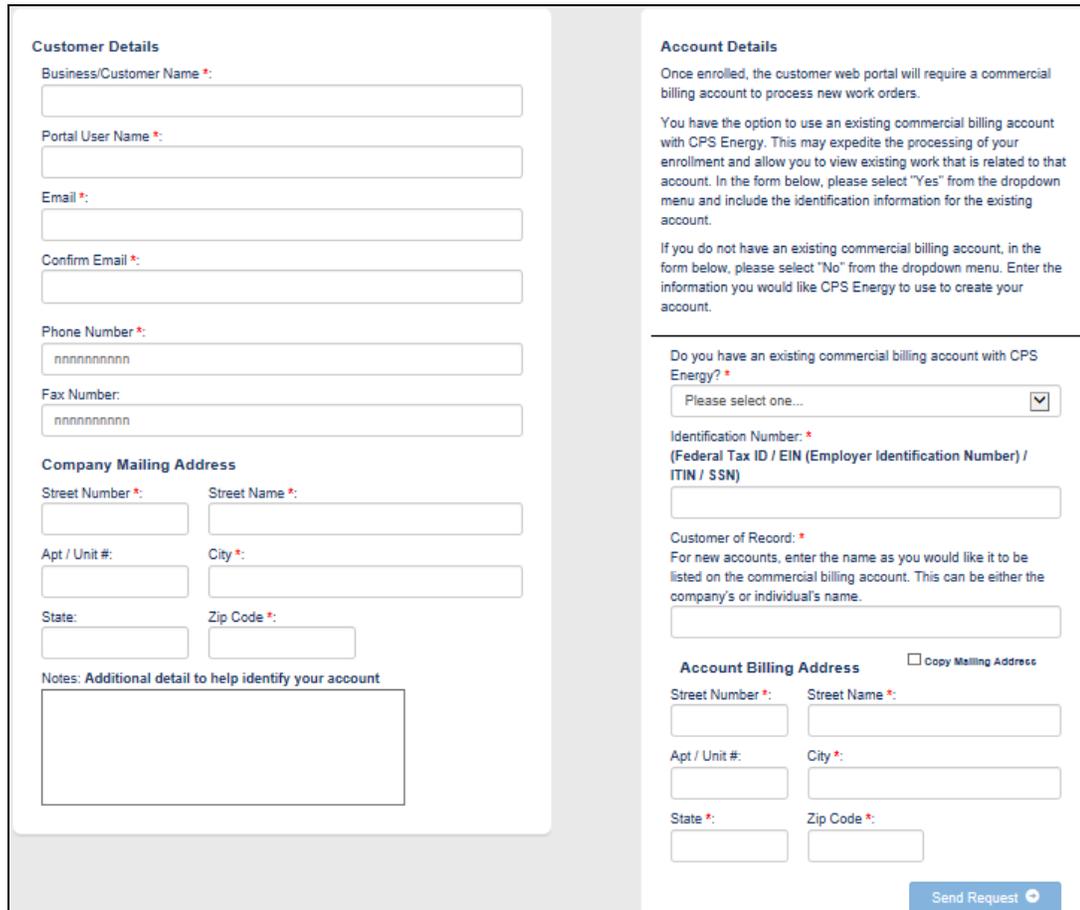
<https://secure.cpsenergy.com/customereng/index.jsp>

2. Select **“Enroll”** option.

Construction & Renovation Web Portal



3. Complete the Online Form and submit. *Please note mandatory fields (*).*



Customer Details

Business/Customer Name *:

Portal User Name *:

Email *:

Confirm Email *:

Phone Number *:

Fax Number:

Company Mailing Address

Street Number *:

Street Name *:

Apt / Unit #:

City *:

State:

Zip Code *:

Notes: Additional detail to help identify your account

Account Details

Once enrolled, the customer web portal will require a commercial billing account to process new work orders.

You have the option to use an existing commercial billing account with CPS Energy. This may expedite the processing of your enrollment and allow you to view existing work that is related to that account. In the form below, please select "Yes" from the dropdown menu and include the identification information for the existing account.

If you do not have an existing commercial billing account, in the form below, please select "No" from the dropdown menu. Enter the information you would like CPS Energy to use to create your account.

Do you have an existing commercial billing account with CPS Energy? *
Please select one...

Identification Number: *
(Federal Tax ID / EIN (Employer Identification Number) / ITIN / SSN)

Customer of Record: *
For new accounts, enter the name as you would like it to be listed on the commercial billing account. This can be either the company's or individual's name.

Copy Mailing Address

Account Billing Address

Street Number *:

Street Name *:

Apt / Unit #:

City *:

State *:

Zip Code *:

2.2 Subcontractor Authorization

A company can provide permission to a Subcontractor(s) or other individuals to create and update projects on their behalf. To do this, a “CPS Energy Construction & Renovation Web Portal Authorization Form” should be completed.

1. Email csiwebaccess@cpsenergy.com or call (210) 353-2450 to request a form be sent to you.

A new form must be completed with each Project and personnel change.



Construction & Renovation Web Portal Authorization Form

Instructions: This form allows CPS Energy to provide your subcontractors or other individuals with permission to create and manage a Project on your behalf in the Construction & Renovation Web Portal. Please complete all fields, and sign and date this form. Please note that you can add or delete authorized individuals at any time by simply completing and submitting a new form.

Please print clearly and submit completed form to CSIWEBACCESS@CPSENERGY.COM.

Project Name: _____
Project Address: _____
Owner/Developer Name: _____
Authorized Representative Name/Title: _____
Authorized Representative Phone: _____
Authorized Representative Email: _____

Authorized Individuals:

Add or Delete (A/D)	Name	Title/Company

It is understood that by signing this form, that the above-listed authorized persons will be granted access to all information related to your Project in the CPS Energy Construction & Renovation Web Portal. It is also understood that CPS Energy is released from any all claims of any type arising from sharing this information with the above mentioned parties. Please note that this form does not grant access to any customer or billing information in the “Manage My Account” web portal.

Signature of Authorized Representative

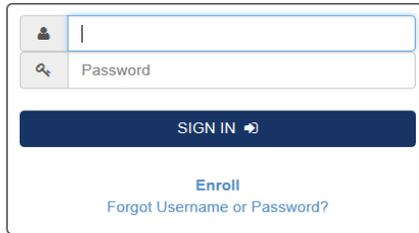
Date

2. Return the completed the form to csiwebaccess@cpsenergy.com for processing.

Section 3: Getting Started in Web Portal

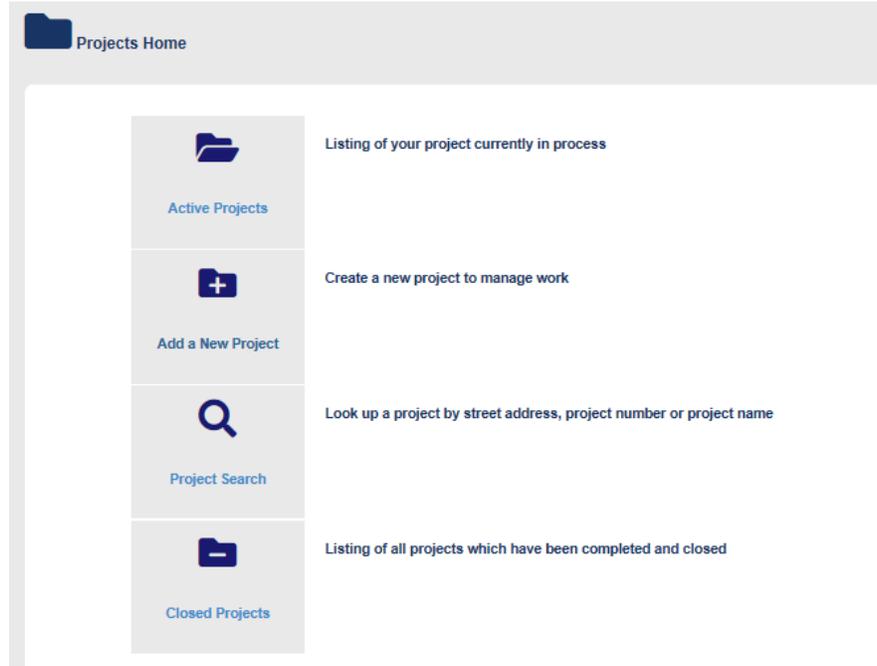
- a. Log into the Web Portal: <https://secure.cpsenergy.com/customereng/index.jsp>

Construction & Renovation Web Portal



Click on **“Forgot Username/Password?”** if needed for Portal Account Recovery.

- b. Select an option to **review** a previously created project or to **create** a new project.



- c. Portal Toolbar Definitions:



1. Home Page
2. Create New Request
3. Search for Work
4. Customer Engineering Assistance
5. Update/Edit User Profile
6. Sign-In User Profile Name
7. Log Out

Section 4: Creating Projects in Web Portal

4.1 Key Categories to Create Project

There are 5 key categories in creating a project:



4.2 Project Type Selection

Click on **Add a New Project**  or the Plus Sign on the Toolbar  to start a new project, then select the Project type option:

- Single-Family Home (Residential Services)
- Multi-Family Complex
- Commercial/Industrial (Small and Large Commercial Services)
- Residential Subdivision
- Customer Assistance (Project Types Not Related to New/ Relocate Services)
- Request New (Billing) Account/New Address (Prior to creating a Project)

4.3 Single-Family Home Project Examples

**** Temporary and Permanent Residential Service Requests MUST go on separate projects****

Temporary Service Requests:

Should be created at the time the service is needed. For these requests, CPS will assume the temporary is built and the site is ready to proceed.

Temporary Service addresses incorporate a “#T” into the address format:

ex: **123 Any Street #T**, San Antonio TX 78201

Temporary Service orders are scheduled within 7 working days of order entry, *excluding the necessary time to create an address if required.*

Permanent Service Requests:

Can be created at any time. CPS will not proceed until the request is marked “Site Ready”.

Permanent Service addresses will use the standard addressing format:

ex: **123 Any Street**, San Antonio TX 78201

This format *may* include unit numbers.

ex: **123 Any Street #1**, San Antonio TX 78201

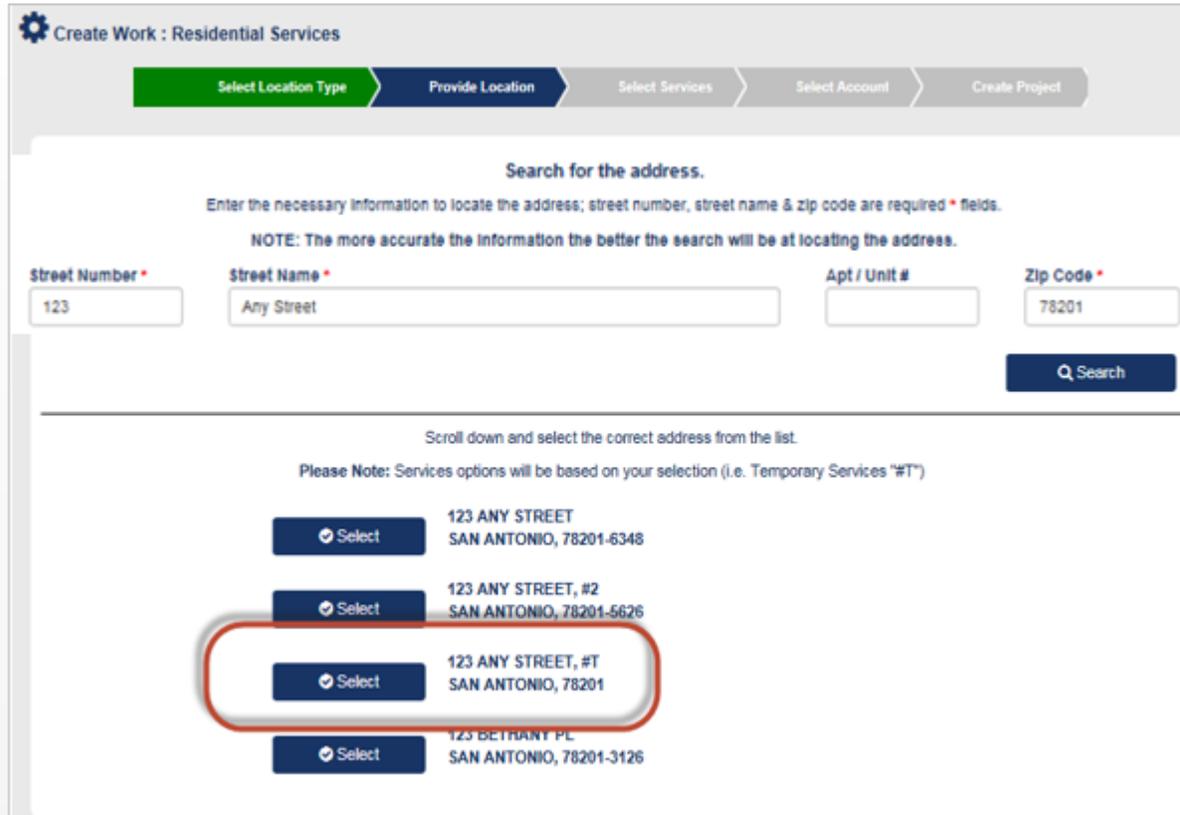
Permanent Electric Service orders are scheduled for delivery within 17 working days of receiving Site Ready confirmation.

Permanent Gas Service orders are scheduled for delivery within 20 working days of the receiving Site Ready confirmation.

**Note: If the “Complete Task” button is not available for Site Ready update, it means the City inspections have not been completed.*

4.3.1 Temporary Service

1. Click on **Add a New Project**  or the Plus Sign on the Toolbar  to start a new project.
2. Click on **“Single-Family Home”** to select the order type.
3. Enter the mandatory fields - **Street Number, Street Name, and Zip Code**.
4. Click on **“Search”**.
5. Select the Address with **“#T”**.



Create Work : Residential Services

Select Location Type Provide Location Select Services Select Account Create Project

Search for the address.

Enter the necessary information to locate the address; street number, street name & zip code are required * fields.

NOTE: The more accurate the information the better the search will be at locating the address.

Street Number * 123 Street Name * Any Street Apt / Unit # Zip Code * 78201

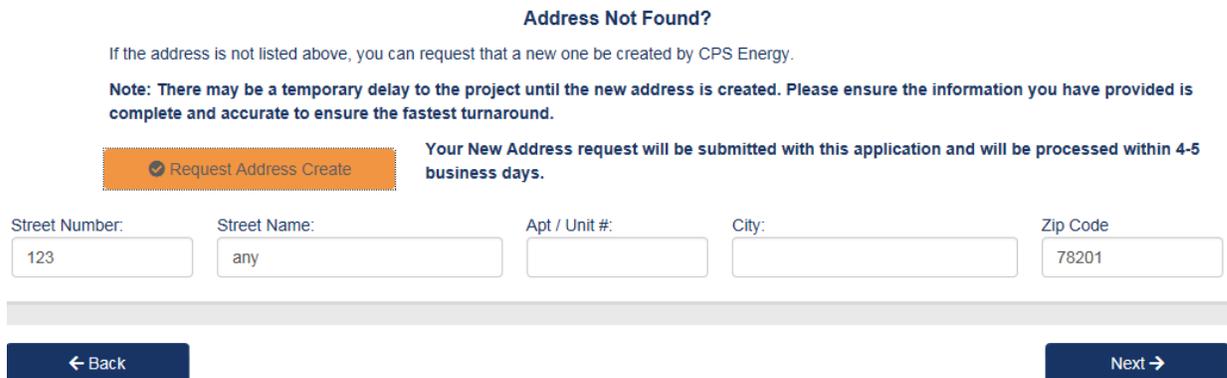
Search

Scroll down and select the correct address from the list.

Please Note: Services options will be based on your selection (i.e. Temporary Services "#T")

- Select 123 ANY STREET SAN ANTONIO, 78201-6348
- Select 123 ANY STREET, #2 SAN ANTONIO, 78201-5626
- Select 123 ANY STREET, #T SAN ANTONIO, 78201
- Select 123 BETHANY PL SAN ANTONIO, 78201-3126

6. If the Temporary Address you are creating the order for is not available, click on **“Request Address Create”**.



Address Not Found?

If the address is not listed above, you can request that a new one be created by CPS Energy.

Note: There may be a temporary delay to the project until the new address is created. Please ensure the information you have provided is complete and accurate to ensure the fastest turnaround.

Request Address Create

Your New Address request will be submitted with this application and will be processed within 4-5 business days.

Street Number: 123 Street Name: any Apt / Unit #: City: Zip Code: 78201

Back Next

7. Verify the Address to be requested and Click on **“Next”** to continue.

8. Select the **Temporary Service** icon (“I want to do something else”).

+ Create Work : Residential Services

Select Type → Provide Location → **Select Services** → Select Account → Create Project


I want to add permanent electric and/or gas service.


I want to do something else.

Gas, Electric and Temporary service availability is determined by the selected address on the previous screen. If a service option is disabled, you can select a different address, request that one be created, or contact [CPS Energy:Customer Engineering](#) for assistance.

Select the desired service.

Add Services	Relocation Services	Remove Services
<input checked="" type="radio"/> Add Temporary Electric Service	<input type="radio"/> Existing Electric Service	<input type="radio"/> Existing Electric Service
<input type="radio"/> Add Lights	<input type="radio"/> Existing Gas Service	<input type="radio"/> Existing Gas Service
	<input type="radio"/> Existing Lights	<input type="radio"/> Existing Lights
	<input type="radio"/> Existing Temporary	<input type="radio"/> Existing Temporary

← Back Next →

9. Select desired service.

10. Click on **“Next”** at the bottom right to continue.

11. Select your Billing Account or **Request New Account** if not listed.

Create Work : Residential Services

Select Type Provide Location Select Services **Select Account** Create Project

Select your billing account.

Select #1 1. (0105203562) GRACE TABERNACLE

Account Not Listed?

If the account you would like to use is not listed, select the "Request New Acct" button to have CPS Energy create the new account.

NOTE: processing can take a few days to complete.

Request New Acct

Back Next

12. Click on **Next** at the bottom right to continue.

13. Enter Project Details:

+ Create Work : Residential Services

Select Type > Provide Location > Select Services > Select Account > **Create Project**

Project Details

Project Name *

Before CPS Energy can install your service, you will need to prepare your site according to [CPS Energy Service Standards - Site Ready](#) and make any applicable payments.

When do you estimate your site will be ready? *

Based on your selected date, the CPS Energy Estimated Delivery Date is:

What is the expected square footage?

Have you already had a preliminary meeting with CPS Energy?

Will installation require street lights?

Will you require temporary electric service?
**** Does not create a Temp Work Request ****

Is this a new or existing structure?

Provide any details to help us better assist on this project.

Project Contact Information

Contact Name *:

Contact Notifications:

Phone (10 Digit Number Only) *:

Type:

Email Address *:

Confirm Email:

Street Number: Street Name:

Apt / Unit #: City:

State: Zip Code:

[← Back](#) [Submit Application](#)

Note: Must select Notifications for Contact to receive updates/status messages on jobs.

14. Click on “Submit Application”.

REQUEST RECEIVED!



Your project 123 Any (Project # 66591) has been successfully created.

[Go To Project →](#)

Note: If requested, the Address Request Notification number will be included for your reference. Please allow 24-48 hours for Addressing to update our database. Additional information may be requested if needed to complete.

4.3.2 Permanent Service

1. Click on **Add a New Project**  or the Plus Sign on the Toolbar  to start a new project.
2. Click on **“Single-Family Home”** to select the order type.
3. Enter the mandatory fields - **Street Number**, **Street Name**, and **Zip Code**.
4. Click on **“Search”**.
5. Select the Standard Address option.

+ Create Work : Residential Services

Select Location Type | Provide Location | Select Services | Select Account | Create Project

Search for the address.
Enter the necessary information to locate the address; street number, street name & zip code are required * fields.
NOTE: The more accurate the information the better the search will be at locating the address.

Street Number * 123	Street Name * Any	Apt / Unit # 	Zip Code * 78201
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Scroll down and select the correct address from the list.

Please Note: Services options will be based on your selection (i.e. Temporary Services "#T")

<input checked="" type="checkbox"/> Select	123 ANY STREET SAN ANTONIO, 78201-6348
<input checked="" type="checkbox"/> Select	123 ANY STREET, #2 SAN ANTONIO, 78201-6626
<input checked="" type="checkbox"/> Select	123 ANY STREET, #T SAN ANTONIO, 78201
<input checked="" type="checkbox"/> Select	123 BETHANY PL SAN ANTONIO, 78201-3126

6. If the Permanent Address you are creating the order for is not available, click on **“Request Address Create”**.

Address Not Found?
If the address is not listed above, you can request that a new one be created by CPS Energy.
Note: There may be a temporary delay to the project until the new address is created. Please ensure the information you have provided is complete and accurate to ensure the fastest turnaround.

Your New Address request will be submitted with this application and will be processed within 4-5 business days.

Street Number: 123	Street Name: any	Apt / Unit #: 	City: 	Zip Code 78201
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7. Verify the Address to be requested and Click on **“Next”** to continue.

8. Select **Permanent Service** icon (“I want to add permanent electric and/or gas service”).

+ Create Work : Residential Services

Select Type → Provide Location → **Select Services** → Select Account → Create Project

 I want to add permanent electric and/or gas service.

 I want to do something else.

Gas, Electric and Temporary service availability is determined by the selected address on the previous screen. If a service option is disabled, you can select a different address, request that one be created, or contact [CPS Energy:Customer Engineering](#) for assistance.

Select the desired services.
(Select all that apply)

Add Services

Add Electric Service

Add Gas Service

← Back Next →

9. Select desired service - *select Electric & Gas if in the same trench.*
10. Click on **“Next”** at the bottom right to continue.

11. Select your Billing Account or **Request New Account** if not listed.

Create Work : Residential Services

Select Type Provide Location Select Services Select Account Create Project

Select your billing account.

1. (0105203562) GRACE TABERNACLE

Select #1

Account Not Listed?

If the account you would like to use is not listed, select the "Request New Acct" button to have CPS Energy create the new account.

NOTE: processing can take a few days to complete.

Request New Acct

Back Next

12. Click on **“Next”** at the bottom right to continue.

13. Enter Project Details:

+ Create Work : Residential Services

Select Type → Provide Location → Select Services → Select Account → **Create Project**

Project Details

Project Name *

Before CPS Energy can install your service, you will need to prepare your site according to [CPS Energy Service Standards - Site Ready](#) and make any applicable payments.

When do you estimate your site will be ready? *

Based on your selected date, the CPS Energy Estimated Delivery Date is:

What is the expected square footage?

Have you already had a preliminary meeting with CPS Energy?

Will installation require street lights?

Will you require temporary electric service?
**** Does not create a Temp Work Request ****

Is this a new or existing structure?

Provide any details to help us better assist on this project.

Project Contact Information

Contact Name *:

Contact Notifications:

Phone (10 Digit Number Only) *:

Type:

Email Address *:

Confirm Email:

Street Number: Street Name:

Apt / Unit #: City:

State: Zip Code:

[← Back](#) [Submit Application](#)

Must select Contact Notifications to receive updates and messages via the Web Portal.

14. Click **“Submit Application”**.

REQUEST RECEIVED!



Your project 123 Any (Project # 66591) has been successfully created.

[Go To Project →](#)

Note: If requested, the Address Request Notification number will be included for your reference. Please allow 24-48 hours for Addressing to update our database. Additional information may be requested if needed to complete.

4.4 Multi-Family Complex Project

This project type is not address-specific

1. Click on **Add a New Project**  or the Plus Sign on the Toolbar  to start a new project.
2. Click on **“Multi-Family Complex”** to select the order type.
3. Select the desired services.
4. Click on **“Next”**.

Create Work : Multi-Family

Select Location Type | **Select Services** | Select Account | Provide Location | Create Project

Select the desired services.

Add Services	Relocate Services	Remove Services
<input type="checkbox"/> Add Electric Service	<input type="checkbox"/> Relocate Existing Electric Service	<input type="checkbox"/> Remove Existing Electric Service
<input type="checkbox"/> Add Gas Service	<input type="checkbox"/> Relocate Existing Gas Service	<input type="checkbox"/> Remove Existing Gas Service
<input type="checkbox"/> Add Lights	<input type="checkbox"/> Relocate Existing Lights	<input type="checkbox"/> Remove Existing Lights
<input type="checkbox"/> Add Temporary Electric Service	<input type="checkbox"/> Relocate Existing Temporary	<input type="checkbox"/> Remove Existing Temporary

[← Back](#) [Next →](#)

5. Select Billing Account or **Request New Account** if needed.
6. Click on **“Next”** at the bottom right to continue.

Create Work : Multi-Family

Select Location Type | **Select Services** | **Select Account** | Provide Location | Create Project

Select your billing account.

[Select #1](#) 1. (0105203562) GRACE TABERNACLE

Account Not Listed?

If the account you would like to use is not listed, select the "Request New Acct" button to have CPS Energy create the new account.

NOTE: processing can take a few days to complete.

[Request New Acct](#)

[← Back](#) [Next →](#)

7. Enter Project Details:

Create Work : Multi-Family

Select Location Type | Select Services | Select Account | Provide Location | **Create Project**

What is the name of the Project? *

What is the location or nearest intersection?

What type of business are expected for this project?

How many units are in this project?

What is the expected average square footage?

Have you already had a preliminary meeting with CPS Energy?
Select ==>

What date do you estimate your site will be ready for CPS Energy to begin construction?

Note: Please allow time to complete your responsibilities and make applicable payments in advance of the date you estimate your site will be ready.

What date would you like electric and/or gas service to start?

Note: The date you select is subject to change based on the complexity of this selected project and completion of your responsibilities. For more information please call 210-353-4050 or go to: Customer Engineering Assistance.

What is the service voltage?

Is there infrastructure requiring removal or relocation?
Select ==>

Describe the trenching soil conditions?
Select ==>

Project Contact Information

Contact Name:

Contact Notifications:
Contact does not receive Update/Status Messages

Phone (10 Digit Number Only): Type:
Select ==>

Email Address:

Confirm Email:

Street Number: Street Name:

Apt / Unit #: City:

State: Zip Code
Select ==>

Do you need an address created?

Street Number: Street Name:

Apt / Unit #: City:

State: Zip Code
Select ==>

Provide any details to help us better assist on this project.

[← Back](#) [Submit Application](#)

Must select Contact Notifications to receive updates and messages via the Web Portal.

8. Click **“Submit Application”**.

REQUEST RECEIVED!



Your project 123 Any Multi-Family (Project # 66592) has been successfully created.

[Go To Project →](#)

4.5 Commercial/Industrial Project

1. Click on **Add a New Project**  or the Plus Sign on the Toolbar  to start a new project.
2. Click on **“Commercial Services”** to select the order type.
3. Enter the mandatory fields - **Street Number, Street Name, and Zip Code**.
4. Click on **“Search”**.
5. Select the appropriate Address.
6. If the Address you are creating the order for is not available, click on **“Request Address Create”**.
7. Verify the Address to be requested and Click on **“Next”** to continue.

+ Create Work : Commercial Services

Select Location Type | Provide Location | Select Services | Select Account | Create Project

Search for the address.

Enter the necessary information to locate the address; street number, street name & zip code are required * fields.

NOTE: The more accurate the information the better the search will be at locating the address.

Street Number * Street Name * Apt / Unit # Zip Code *

Scroll down and select the correct address from the list.

Please Note: Services options will be based on your selection (i.e. Temporary Services "#T")

- Select 123 ANY STREET
SAN ANTONIO, 78201-6348
- Select 123 ANY STREET, #2
SAN ANTONIO, 78201-5626
- Select 123 ANY STREET, #T
SAN ANTONIO, 78201
- Select 123 BETHANY PL
SAN ANTONIO, 78201-3126

Address Not Found?

If the address is not listed above, you can request that a new one be created by CPS Energy.

Note: There may be a temporary delay to the project until the new address is created. Please ensure the information you have provided is complete and accurate to ensure the fastest turnaround.

Request Address Create Your New Address request will be submitted with this application and will be processed within 4-5 business days.

Street Number: Street Name: Apt / Unit #: City: Zip Code:

8. Select desired services.
9. Click on **“Next”** at the bottom right to continue.

Create Work : Commercial Services

Select Type > Provide Location > **Select Services** > Select Account > Create Project

Select the desired services.

Add Services	Relocate Services	Remove Services
<input type="checkbox"/> Add Electric Service	<input type="checkbox"/> Relocate Existing Electric Service	<input type="checkbox"/> Remove Existing Electric Service
<input type="checkbox"/> Add Gas Service	<input type="checkbox"/> Relocate Existing Gas Service	<input type="checkbox"/> Remove Existing Gas Service
<input type="checkbox"/> Add Lights	<input type="checkbox"/> Relocate Existing Lights	<input type="checkbox"/> Remove Existing Lights
<input type="checkbox"/> Add Temporary Electric Service	<input type="checkbox"/> Relocate Existing Temporary	<input type="checkbox"/> Remove Existing Temporary

Back Next

10. Select Billing Account or **Request New Account** if needed.
11. Click on **“Next”** at the bottom right to continue.

Create Work : Commercial Services

Select Type > Provide Location > **Select Services** > **Select Account** > Create Project

Select your billing account.

1. (0105203562) GRACE TABERNACLE

Select #1

Account Not Listed?

If the account you would like to use is not listed, select the "Request New Acct" button to have CPS Energy create the new account.

NOTE: processing can take a few days to complete.

Request New Acct

Back Next

12. Enter Project Details:

Create Work : Commercial Services

Select Type Provide Location Select Services Select Account Create Project

Project Details

Project Name *
PROJECT NAME AND ADDRESS

What date would you like electric and/or gas service to start?
09/27/2019

Please note that your service start date will depend on the complexity of your project and the completion of your responsibilities described in the [Construction & Renovation Step-by-Step Processes](#).

What is the service voltage?
Select ==>

Have you already had a preliminary meeting with CPS Energy?
Select ==>

Is there infrastructure requiring removal or relocation?
Select ==>

Describe the trenching soil conditions?
Select ==>

Provide any details to help us better assist on this project.

Project Contact Information

Contact Name:
[Text Field]

Contact Notifications:
Contact does not receive Update/Status Messages

Phone (10 Digit Number Only): [Text Field] Type: [Select ==>]

Email Address: [Text Field]

Confirm Email: [Text Field]

Street Number: [Text Field] Street Name: **YOUR BUSINESS ADDRESS, NOT PROJECT ADDRESS**

Apt / Unit #: [Text Field] City: [Text Field]

State: [Select ==>] Zip Code: [Text Field]

Back Next

Must select Contact Notifications to receive updates and messages via the Web Portal.

13. Click on **“Submit Application”**.

REQUEST RECEIVED!



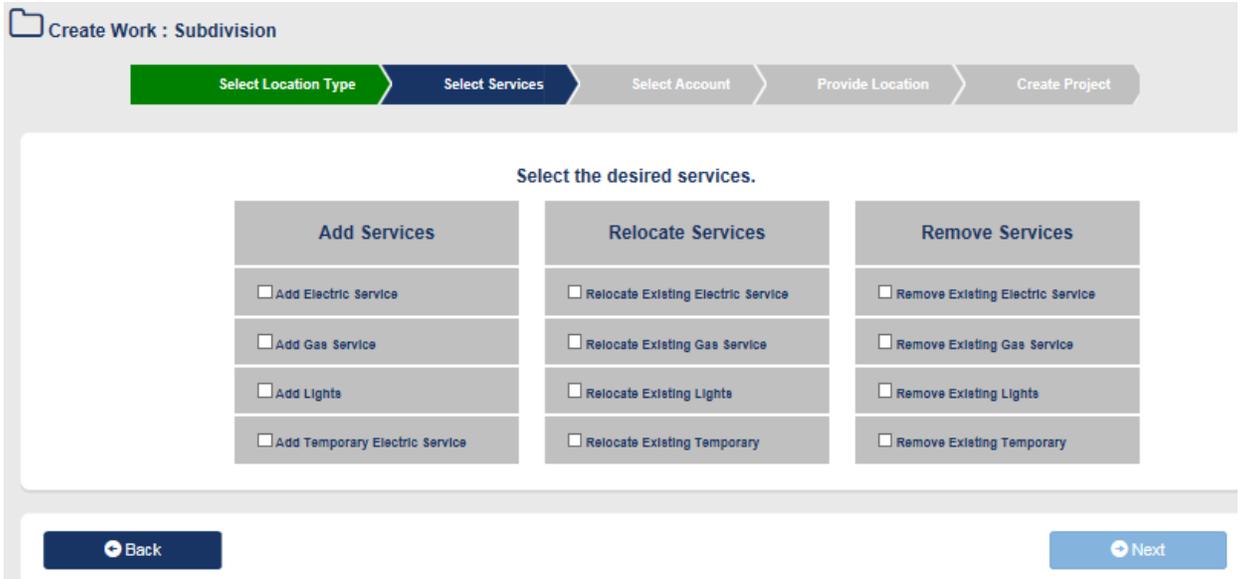
Your project 123 Commercial (Project # 66594) has been successfully created.

Go To Project →

4.6 Residential Subdivision Project

This project type is not address-specific

1. Click on **Add a New Project**  or the Plus Sign on the Toolbar  to start a new project.
2. Click on **Residential Subdivision** to select the order type.
3. Select the desired services.
4. Click on **Next**.

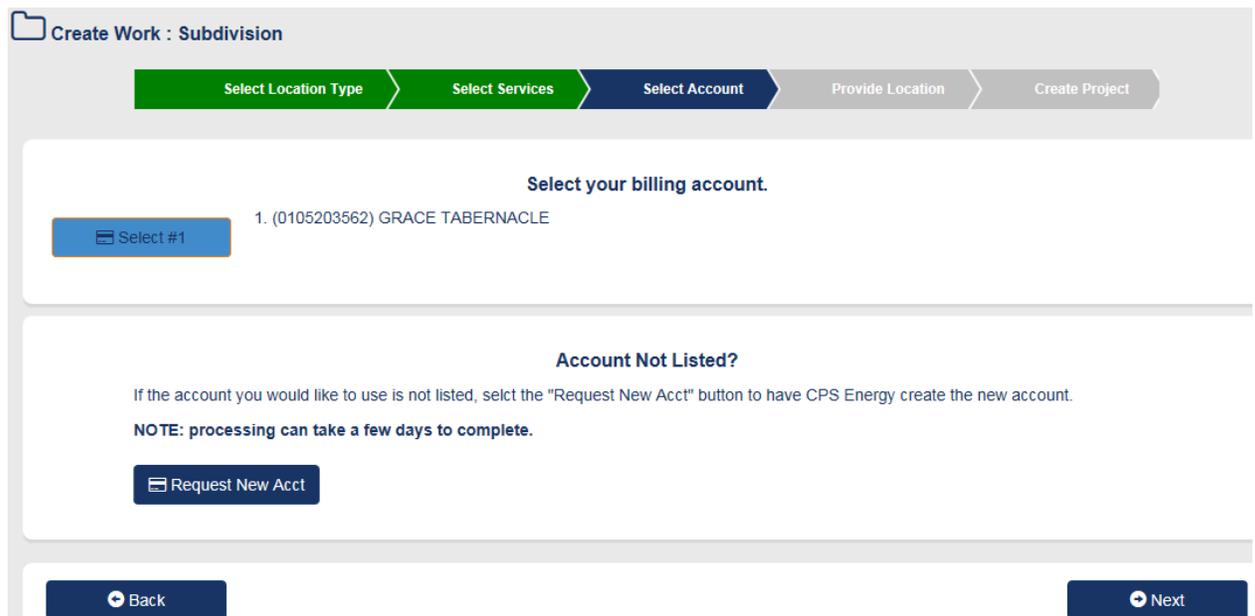


The screenshot shows the 'Create Work : Subdivision' interface. At the top, there is a progress bar with five steps: 'Select Location Type' (highlighted in green), 'Select Services' (highlighted in blue), 'Select Account', 'Provide Location', and 'Create Project'. Below the progress bar, the main content area is titled 'Select the desired services.' and contains three columns of service options:

Add Services	Relocate Services	Remove Services
<input type="checkbox"/> Add Electric Service	<input type="checkbox"/> Relocate Existing Electric Service	<input type="checkbox"/> Remove Existing Electric Service
<input type="checkbox"/> Add Gas Service	<input type="checkbox"/> Relocate Existing Gas Service	<input type="checkbox"/> Remove Existing Gas Service
<input type="checkbox"/> Add Lights	<input type="checkbox"/> Relocate Existing Lights	<input type="checkbox"/> Remove Existing Lights
<input type="checkbox"/> Add Temporary Electric Service	<input type="checkbox"/> Relocate Existing Temporary	<input type="checkbox"/> Remove Existing Temporary

At the bottom of the interface, there are two buttons: a dark blue 'Back' button on the left and a light blue 'Next' button on the right.

5. Select your **Billing Account** or **Request New Account** if not listed.
6. Click on **Next** at the bottom right to continue.



The screenshot shows the 'Create Work : Subdivision' interface. At the top, there is a progress bar with five steps: 'Select Location Type', 'Select Services', 'Select Account' (highlighted in blue), 'Provide Location', and 'Create Project'. Below the progress bar, the main content area is titled 'Select your billing account.' and contains a list of accounts:

1. (0105203562) GRACE TABERNACLE

Below the list, there is a blue button labeled 'Select #1'. Below the button, there is a section titled 'Account Not Listed?' with the following text:

If the account you would like to use is not listed, select the "Request New Acct" button to have CPS Energy create the new account.
NOTE: processing can take a few days to complete.

Below this text, there is a dark blue button labeled 'Request New Acct'. At the bottom of the interface, there are two buttons: a dark blue 'Back' button on the left and a dark blue 'Next' button on the right.

7. Enter Project Details:

Create Work : Subdivision

Select Location Type | Select Services | Select Account | Provide Location | **Create Project**

What is the name of the Project? *

What is the location or nearest intersection?

How many lots are in this project?

What is the expected average square footage?

What date do you estimate your site will be ready for CPS Energy to begin construction?

Note: Please allow time to complete your responsibilities and make applicable payments in advance of the date you estimate your site will be ready.

What date would you like electric and/or gas service to start?

Note: The date you select is subject to change based on the complexity of this selected project and completion of your responsibilities. For more information please call 210-353-4050 or go to: [Customer Engineering Assistance](#).

Have you already had a preliminary meeting with CPS Energy?

Is there infrastructure requiring removal or relocation?

Describe the trenching soil conditions?

Who will perform the trenching installation?

Will there be heat pumps on these premises?

Will there be gas furnaces on these premises?

Will the homes be zero lot line?

Provide any details to help us better assist on this project.

Project Contact Information

Contact Name:

Contact Notifications:
Contact does not receive Update/Status Messages

Phone (10 Digit Number Only): Type:

Email Address:

Confirm Email:

Street Number: Street Name:

Apt / Unit #: City:

State: Zip Code:

Do you need an address created?

Street Number: Street Name:

Apt / Unit #: City:

State: Zip Code:

Back Next

Must select Contact Notifications to receive updates and messages via the Web Portal.

8. Click on “Submit Application”.

REQUEST RECEIVED!



Your project 123 Any Residential Subdivision (Project # 66595) has been successfully created.

[Go To Project →](#)

4.7 Customer Assistance Project

This is used for other project types not related to New or Relocate Services (ex: shoring or removing or relocating poles, sleeving lines, etc.)

1. Click on **Add a New Project**  or the Plus Sign on the Toolbar  to start a new project.
2. Click on **“Customer Assistance”** to select the order type.
3. Enter the mandatory fields - **Street Number, Street Name, and Zip Code**.
4. Click on **“Search”**.
5. Select the appropriate Address.
6. If the Address you are creating the order for is not available, click on **“Request Address Create”**.
7. Verify the Address to be requested and Click on **“Next”** to continue.

+ Create Work : Customer Assistance

Select Type → Provide Location → Select Services → Select Account → Create Project

Search for the address.
Enter the necessary information to locate the address; street number, street name & zip code are required * fields.
NOTE: The more accurate the information the better the search will be at locating the address.

Street Number * Street Name * Apt / Unit # Zip Code *

Scroll down and select the correct address from the list.
Please Note: Services options will be based on your selection (i.e. Temporary Services "#T")

- Select **123 ANY STREET
SAN ANTONIO, 78201-6348**
- Select **123 ANY STREET, #2
SAN ANTONIO, 78201-5626**
- Select **123 ANY STREET, #T
SAN ANTONIO, 78201**

Address Not Found?
If the address is not listed above, you can request that a new one be created by CPS Energy.
Note: There may be a temporary delay to the project until the new address is created. Please ensure the information you have provided is complete and accurate to ensure the fastest turnaround.

Request Address Create **Your New Address request will be submitted with this application and will be processed within 4-5 business days.**

Street Number: Street Name: Apt / Unit #: City: Zip Code:

8. Select Billing Account or **Request New Account** if needed.
9. Click on **“Next”** at the bottom right to continue.

Create Work : Customer Assistance

Select Type > Provide Location > Select Services > **Select Account** > Create Project

Select your billing account.

1. (0105203562) GRACE TABERNACLE

Select #1

Account Not Listed?

If the account you would like to use is not listed, select the "Request New Acct" button to have CPS Energy create the new account.

NOTE: processing can take a few days to complete.

Request New Acct

Back Next

10. Enter Project Details:

Create Work : Customer Assistance

Select Type > Provide Location > Select Services > Select Account > **Create Project**

Project Details

Provide a short description for your request? *

What date do you estimate your site will be ready for CPS Energy to begin construction?

08/29/2019

Note: Please allow time to complete your responsibilities and make applicable payments in advance of the date you estimate your site will be ready.

What date would you like electric and/or gas service to start?

Note: The date you select is subject to change based on the complexity of this selected project and completion of your responsibilities. For more information please call 210-353-4050 or go to: Customer Engineering Assistance.

Provide a brief description of your assistance request so that we can better assist.

Project Contact Information

Contact Name:

Contact Notifications:

Contact does not receive Update/Status Messages

Phone (10 Digit Number Only): Type: Select ==

Email Address:

Confirm Email:

Street Number: Street Name:

Apt / Unit #: City:

State: Zip Code: Select ==>

Must select Contact Notifications to receive updates and messages via the Web Portal.

11. Click on **“Submit Application”**.

REQUEST RECEIVED!



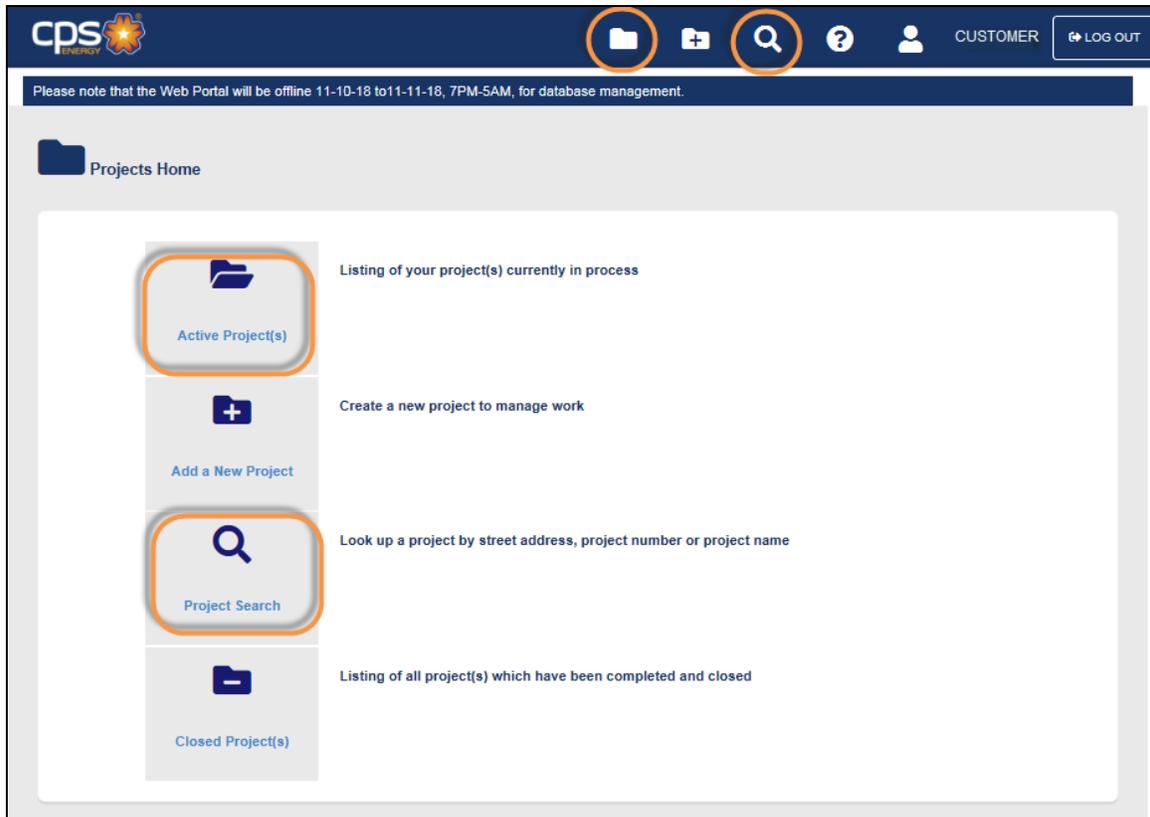
Your project Customer Assistance (Project # 66596) has been successfully created.

Go To Project →

Section 5: Managing Project Data in the Web Portal

5.1 How to Search for Projects to Update

1. Click on **“Home”** icon at the Toolbar .
2. Find Project by clicking on
 - a. **“Active Projects”** or
 - b. **“Project Search”** or
 - c. **the Search icon** on the banner



Project Search will query by Project Number or Address. Enter data into either field and click **“Search”** to see Project Listing

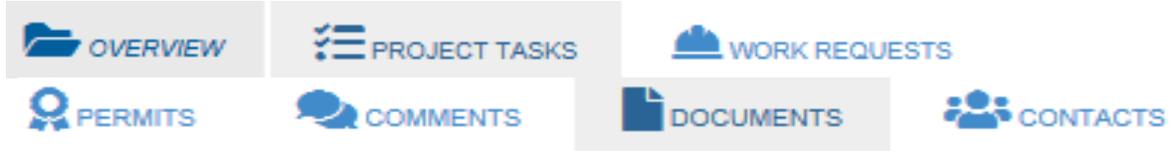
Project #	Project Name	Address Search
		Street Number: 123 Address (Street Name): any

View Details	Description
View Details	AD-35- TEMP -NANCY R (ANY STREET) (123 ANY STREET #T1, , SAN ANTONIO, TX 78209-)
View Details	AD39 REGRESS TEST -123 #T-NANCY (ANY STREET) (123 ANY STREET #T, , SAN ANTONIO, TX 78201-)
View Details	123 Any temp (ANY STREET) (123 ANY STREET #T, , SAN ANTONIO, TX 78201-)
View Details	123 ANY TEMP - ESTEBAN TEST (ANY STREET) (123 ANY STREET #T1, , SAN ANTONIO, TX 78209-)

3. Click on **“View Details”** to open the Project to update.

5.2 Project / Work Request Icons (for mobile view)

Project level:

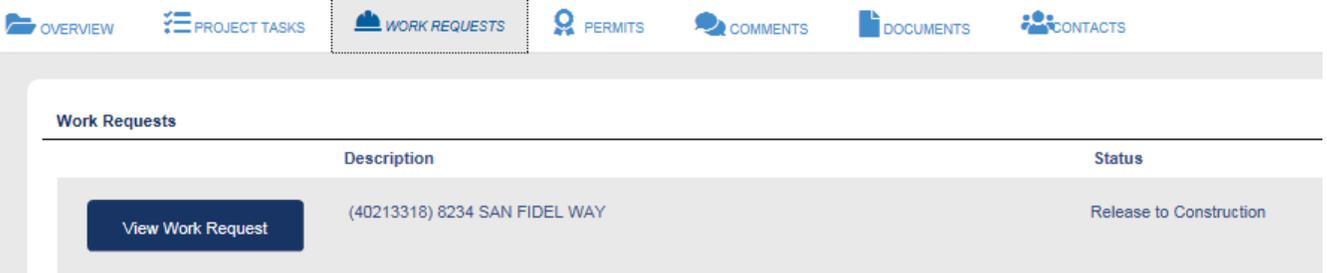


Work Request level:

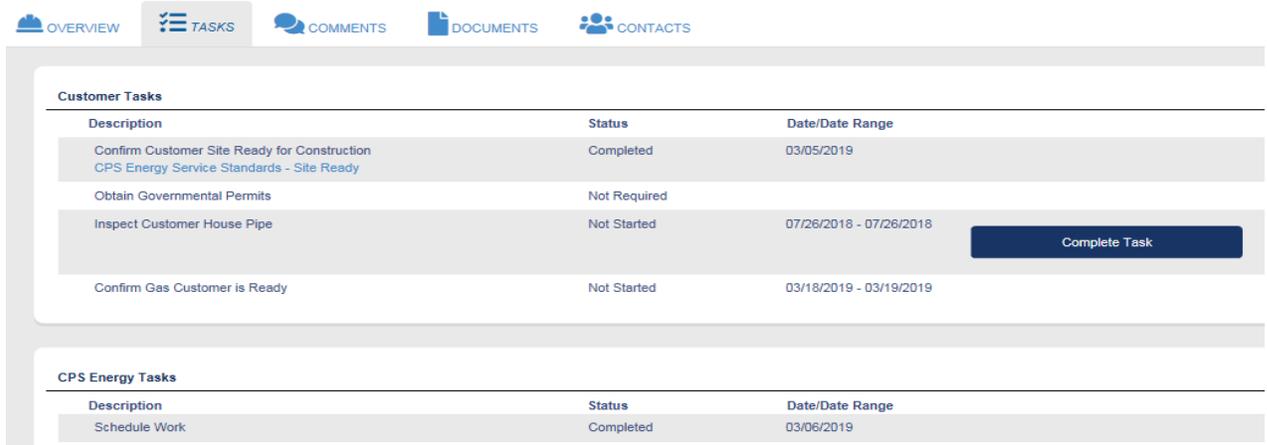


5.3 Updating Work Request Tasks

1. At Project level, click on the Work Request icon.
2. Select the Work Request to be updated and open (“View Work Request”).



3. Click on “Tasks” tab.
4. Click on “Complete Task”.



Note: If you do not click on “Complete Task”, the update can be Cancelled.

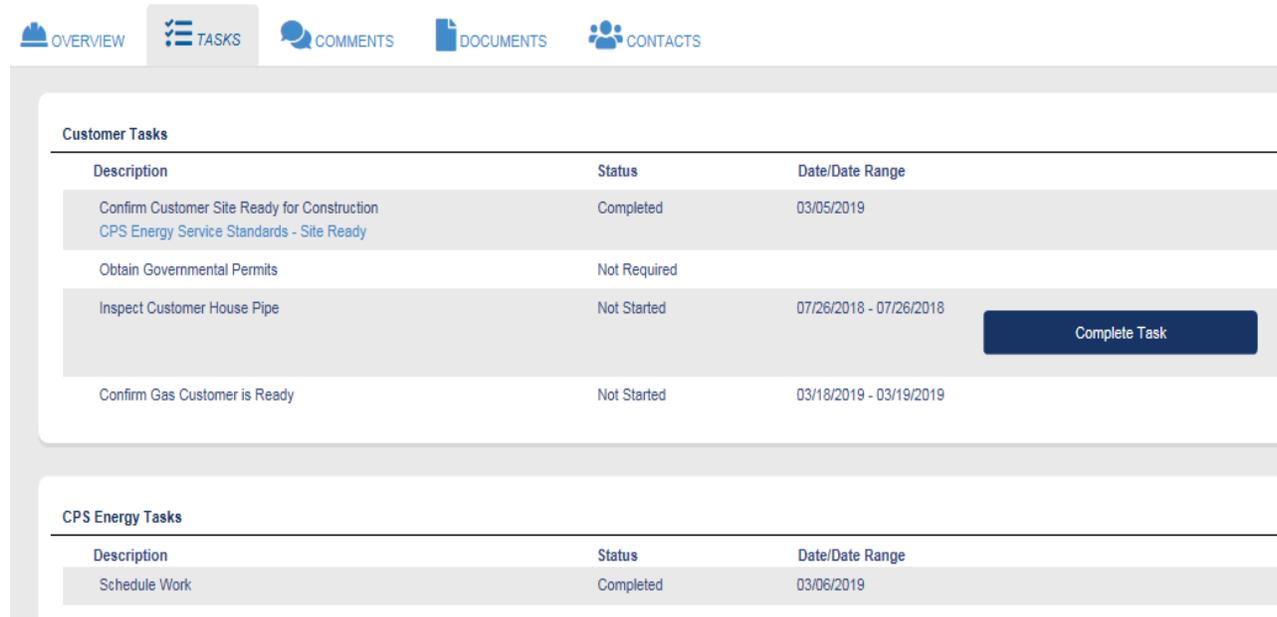
Process Task



Update Site Ready on Electric and Gas Work Requests at the same time if in the same trench.

5.4 Gas Inspection Process

From the Work Request Task level, the “**Complete Task**” button will be visible to trigger the House Pipe (Gas Rough-in) Inspection if preceding tasks have been completed.



The screenshot shows a navigation bar with icons for OVERVIEW, TASKS, COMMENTS, DOCUMENTS, and CONTACTS. Below the navigation bar, there are two sections: 'Customer Tasks' and 'CPS Energy Tasks'. Each section contains a table with columns for Description, Status, and Date/Date Range. A 'Complete Task' button is visible next to the 'Inspect Customer House Pipe' task.

Description	Status	Date/Date Range
Confirm Customer Site Ready for Construction CPS Energy Service Standards - Site Ready	Completed	03/05/2019
Obtain Governmental Permits	Not Required	
Inspect Customer House Pipe	Not Started	07/26/2018 - 07/26/2018
Confirm Gas Customer is Ready	Not Started	03/18/2019 - 03/19/2019

Description	Status	Date/Date Range
Schedule Work	Completed	03/06/2019

Once “**Complete Task**” has been clicked, the Work Request Overview will reflect the Task Status change to “**In-Progress**”.

The Gas Inspection Status can be monitored from the Work Request Overview tab. Status will change accordingly, from *Pending* to *Dispatched*, *Enroute*, *Onsite*, *Turndown* and *Completed*.

If the Inspection fails, status will change to “**Turndown**” and notes will be added to the Comments tab:

The screenshot shows the CPS Energy web portal interface. At the top, there is a navigation bar with the CPS Energy logo, a user profile for JANE DOE, and a LOG OUT button. A notification banner states: "Please note that the Web Portal will be offline 11-10-18 to 11-11-18, 7PM-5AM, for database management." Below this, the breadcrumb trail reads: "Home > UAT Final - Team 3 - Sprint 2 Test Case 3 > 6147 AKN PLACE (Gas Service)".

The main content area features a navigation menu with "OVERVIEW", "TASKS", "COMMENTS", "DOCUMENTS", and "CONTACTS". An "Add Comment" button is located in the top right of the comments section. The "Comments" section displays a list of entries:

- MDS ORDER 40262718RIIG6 COMPLETED BY USER *****:51:30, COMPLETION CODE = C2, TECH REMARKS = inspection approved**
 Comment Type: MDS_GAS_ROUGH_IN
 By: VSS INTERFACE
 Created on: 07/09/2019 00:00:00
- MDS ORDER 40262718RIIG5 TURNDOWN BY USER 14365 2019-07-03 14:05:29, TURNDOWN CODE = 99, TECH REMARKS = failed pressure test 5x**
 Comment Type: MDS_GAS_ROUGH_IN
 By: VSS INTERFACE
 Created on: 07/03/2019 00:00:00
- MDS ORDER 40262718RIIG4 TURNDOWN BY USER 14365 2019-06-20 10:28:10, TURNDOWN CODE = 99, TECH REMARKS = failed pressure test**
 Comment Type: MDS_GAS_ROUGH_IN
 By: VSS INTERFACE
 Created on: 06/20/2019 00:00:00
- MDS ORDER 40262718RIIG3 TURNDOWN BY USER 10744 2019-05-23 10:04:32, TURNDOWN CODE = 99, TECH REMARKS = RII-F NO GAUGE 5/23/19 246**
 Comment Type: MDS_GAS_ROUGH_IN
 By: VSS INTERFACE
 Created on: 05/23/2019 00:00:00
- MDS ORDER 40262718UEDAG1 COMPLETED BY TECH C0012240 AT 2019-05-20 09:07:26 COMPLETION CODE = CA, TECH REMARKS = UNDERGROUNDS COMPLETED BY MILLER BROS 5-20-19**
 Comment Type: MDS_UEDCR_COMMENTS
 By: VSS INTERFACE
 Created on: 05/20/2019 00:00:00
- MDS ORDER 40262718RIIG2 TURNDOWN BY USER 10744 2019-05-16 15:41:46, TURNDOWN CODE = 99, TECH REMARKS = RII-F B/O P/T 5/16/19 246**
 Comment Type: MDS_GAS_ROUGH_IN
 By: VSS INTERFACE
 Created on: 05/16/2019 00:00:00

The Work Request Task Status will revert to **“Not Started”**. Once corrections have been made, the **“Complete Task”** button again be clicked to re-trigger the Gas Inspection.

Once the Inspection has successfully passed, the Work Request Overview status will change to **“Completed”**.

Section 6: Customer Options

6.1 Requesting New Account/New Address



Request New Account is to create a new billing account.

Request New Address is to have addresses created for future projects.

1. Click on **“Add New Project”** to show project types.
2. Click on **“Request New Account”** (billing) / **“Request New Address”**.
3. Select appropriate icon for action needed.
4. Complete information fields and **Submit Request**.

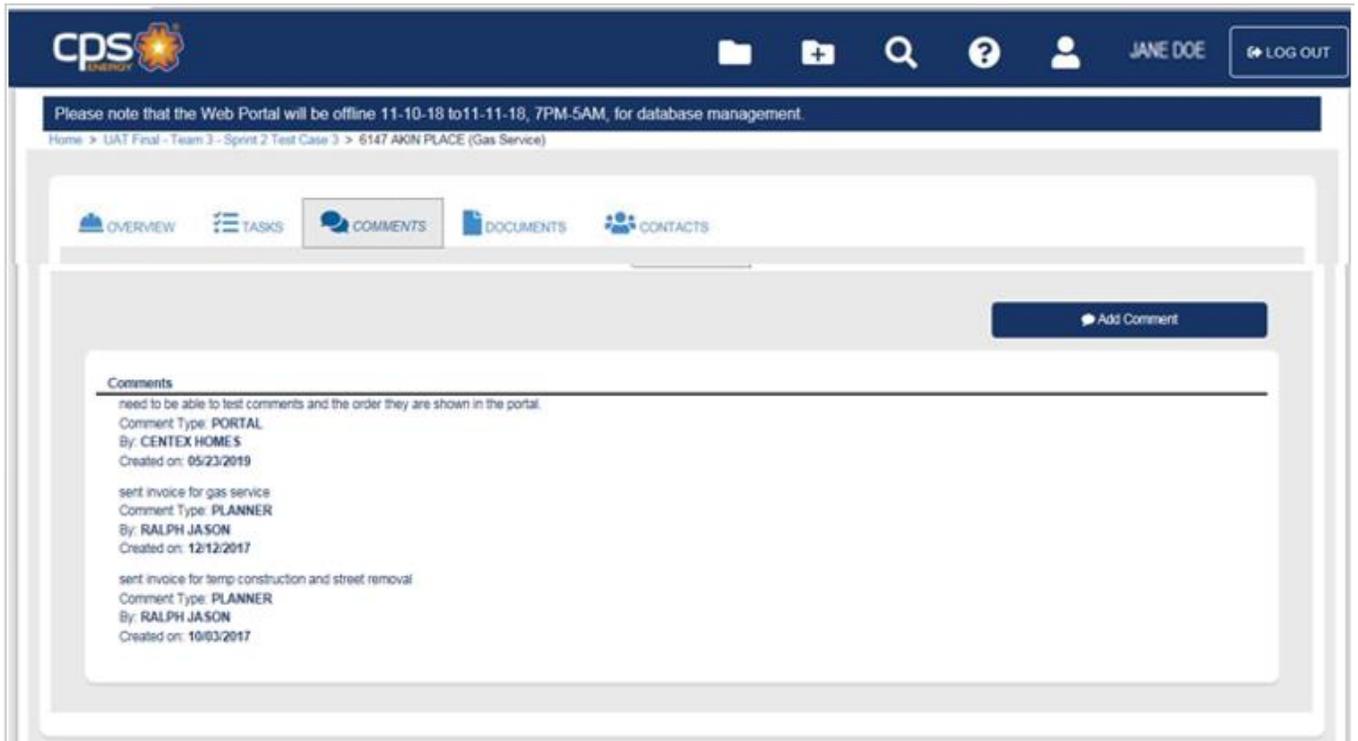
A notification number will be listed on your request confirmation and an email will be issued to the primary Project Contact. Accounting and Addressing Departments will be notified of your request and will contact you for more information, if needed, and to confirm when your request has been completed.

6.2 Additional Information Features



6.2.1 Comments

It is important to enter comments at the Project level to communicate with your Project Designer at CPS Energy. Comments will be displayed in chronological order. Inspection turndown notes from the field tech will be included in this section for your corrective action.



6.2.2 Documents

It is important to upload documents at the Project level. This will provide accessibility of documentation to everyone who is allowed access within a Project.

Files will be listed by order of archive date and require a brief document description to be included at upload.

File size limitations have not been set but please optimize documents for faster data transfer.

6.2.3 Contacts

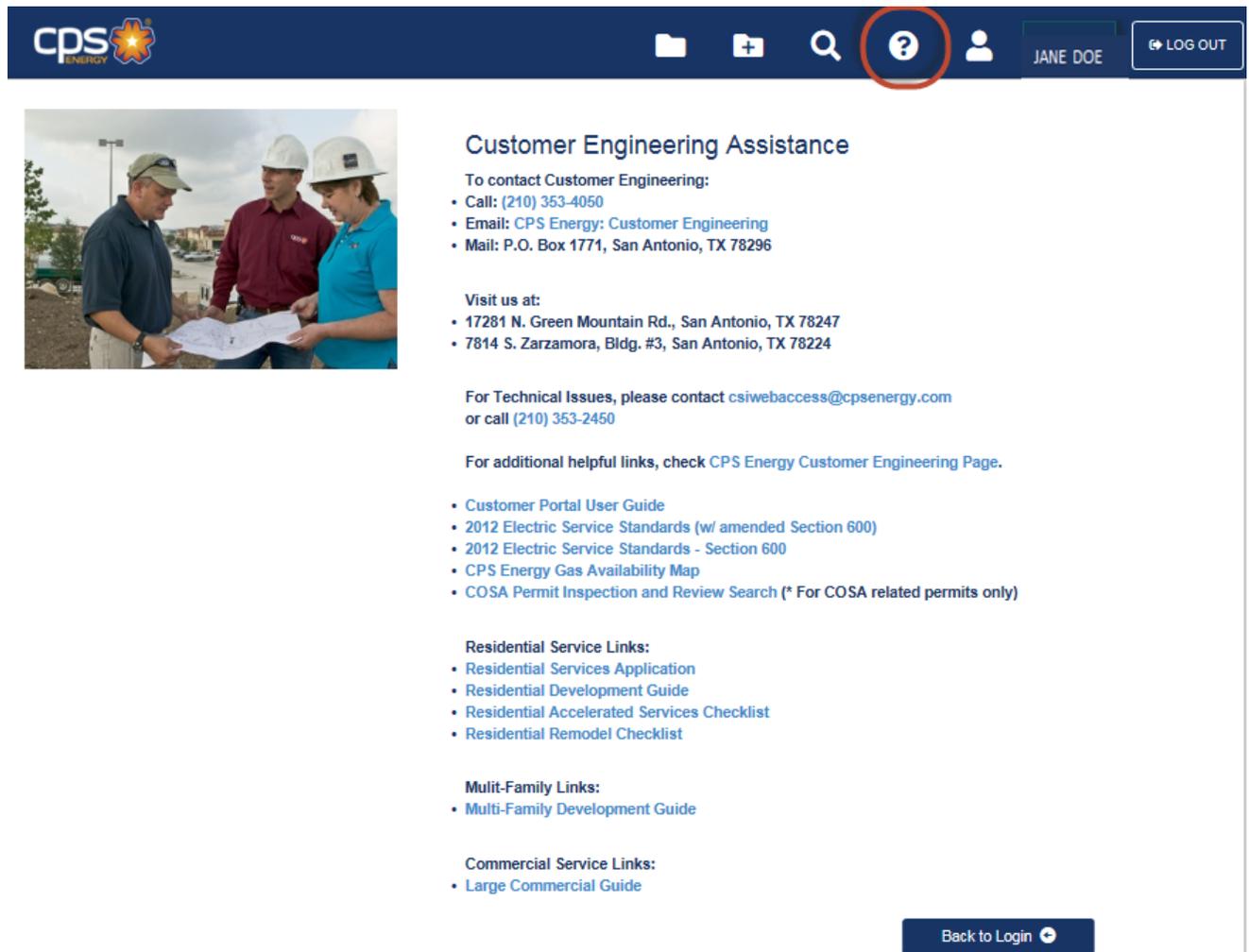
Contacts entered at the Project level will have the option of receiving notifications when tasks are completed at the Project AND Work Request levels.

Contacts entered at the Work Request level will only have the option of receiving task updates that apply to the assigned Work Request and will not receive Project updates.

Section 7: Customer Engineering Assistance

Click on the  icon in the toolbar.

Contact information and helpful links will be displayed for your reference.



Customer Engineering Assistance

To contact Customer Engineering:

- Call: (210) 353-4050
- Email: CPS Energy: Customer Engineering
- Mail: P.O. Box 1771, San Antonio, TX 78296

Visit us at:

- 17281 N. Green Mountain Rd., San Antonio, TX 78247
- 7814 S. Zarzamora, Bldg. #3, San Antonio, TX 78224

For Technical Issues, please contact csiwebaccess@cpsenergy.com or call (210) 353-2450

For additional helpful links, check [CPS Energy Customer Engineering Page](#).

- [Customer Portal User Guide](#)
- [2012 Electric Service Standards \(w/ amended Section 600\)](#)
- [2012 Electric Service Standards - Section 600](#)
- [CPS Energy Gas Availability Map](#)
- [COSA Permit Inspection and Review Search \(* For COSA related permits only\)](#)

Residential Service Links:

- [Residential Services Application](#)
- [Residential Development Guide](#)
- [Residential Accelerated Services Checklist](#)
- [Residential Remodel Checklist](#)

Mult-Family Links:

- [Multi-Family Development Guide](#)

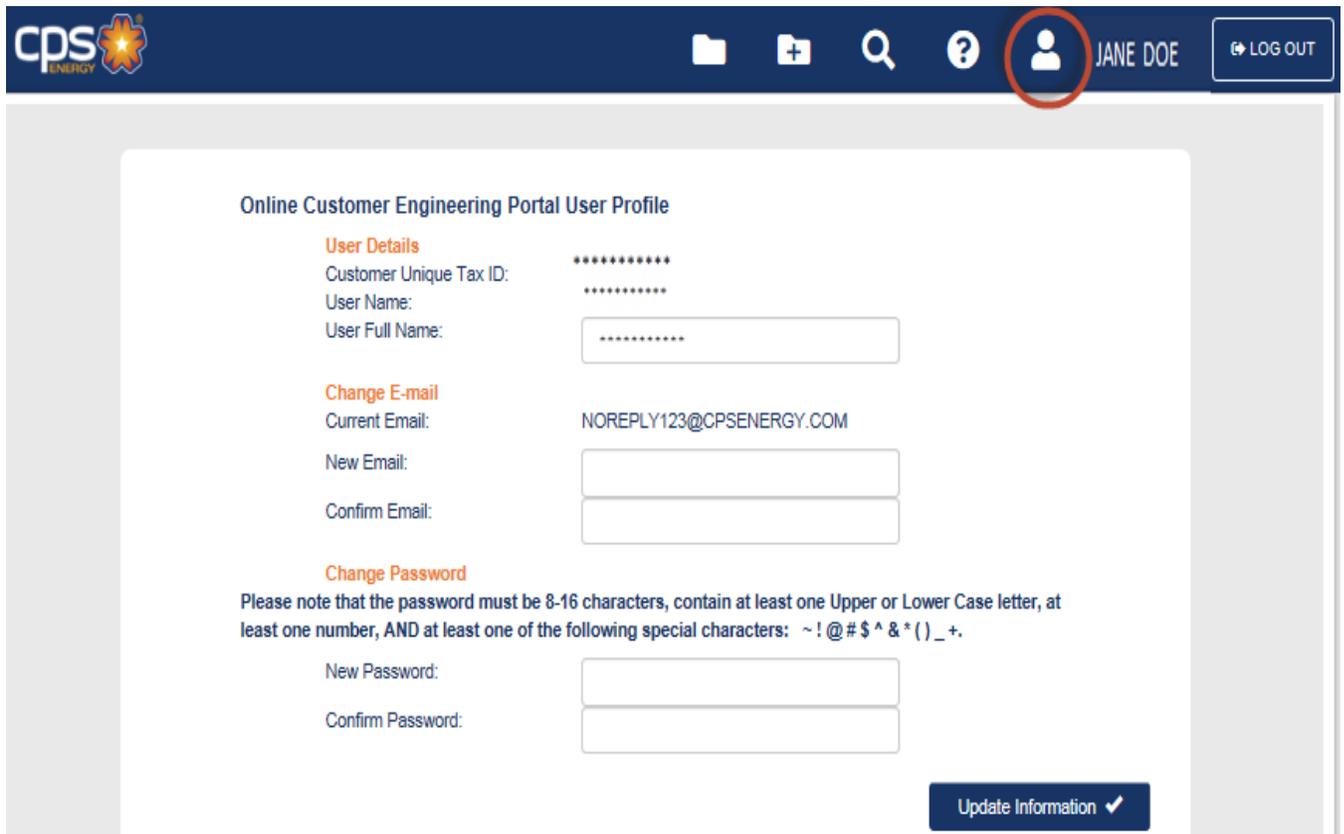
Commercial Service Links:

- [Large Commercial Guide](#)

[Back to Login](#)

Section 8: Customer Profile User Update

1. Click on the  icon in the toolbar.
2. You will be able to update User Name and email address and/or change your password from this screen.
3. Click on ***“Update Information”***.



Online Customer Engineering Portal User Profile

User Details

Customer Unique Tax ID: *****

User Name: *****

User Full Name:

Change E-mail

Current Email: NOREPLY123@CPSENERGY.COM

New Email:

Confirm Email:

Change Password

Please note that the password must be 8-16 characters, contain at least one Upper or Lower Case letter, at least one number, AND at least one of the following special characters: ~!@#\$%^*()_+.

New Password:

Confirm Password:

[Update Information ✓](#)