



*In the Community to Serve<sup>®</sup>*

Portfolio Manager How-To Guide for Customers

# 1 I need to Benchmark, Now What?

## Let's Connect!

Once you've logged in and created a Portfolio Manager account, connect with Cascade Natural Gas Corporation.

1. On the home screen click **CONTACTS** in the upper right-hand corner.
2. Then **Search for new contacts**

Welcome CNGCEE: [Account](#) | [Notifications](#) | [ENERGY STAR Notifications](#) | [Contacts](#) | [Help](#) | [Sign Out](#)

**MyContacts** | **Sharing** | **Reporting** | **Recognition**

### My Contacts

[Search for new contacts](#)

This is where you keep track of your contacts and/or organizations (i.e. people or companies associated with your properties such as Professional Engineers, Registered Architects, or others with whom you share information). You can add anyone as a contact, regardless of whether they have a Portfolio Manager account and you can share your properties & reports with any of your **connected** contacts. You can "connect" to other Portfolio Manager users by searching for their accounts and sending a connection request.

[Share](#) [Edit](#) [Delete](#) [Add Contact](#) [Add Organization](#)

All	<input type="checkbox"/>	Name	Organization
C		<a href="#">Cascade Natural Gas (CascadeNaturalGas)</a>	<a href="#">Cascade Natural Gas</a>
N	<input type="checkbox"/>	Connected	
W		<i>Benchmarking</i>	

[Share](#) [Edit](#) [Delete](#) [Add Contact](#) [Add Organization](#)

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# 1 I need to Benchmark, Let's Connect

1. In SEARCH FOR NEW CONTACTS, enter **Cascade Natural Gas** in the search or look under ORGANIZATION: then search.
2. Then click **Connect** on the Cascade Natural Gas *Benchmarking with Cascade Natural Gas* option

MyPortfolio   Sharing   Reporting   Recognition

## Search Results

The results of your search are listed below. Clicking "Connect" will send a request to the person asking them to confirm your request to add them as your contact. If they accept, you will see them listed as a connected contact in your address book. If they do not accept, or have not accepted yet, you will see them as an unconnected contact in your address book. Connecting with contacts will make it easier to share property information within Portfolio Manager.

**Your Search Criteria**

Name:

Organization:

Username:

Email Address:

 Cascade Natural Gas Benchmarking with Cascade Natural Gas	<input type="button" value="Connect"/>
 Michael Brooks Mgr, Administrative Services with Cascade Natural Gas Corporation	<input type="button" value="Connect"/>

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**i Tip**  
Can't find what you are looking for? Try adjusting your search criteria.

# 1 I need to Benchmark, Let's Connect

1. Check the box to agree to the Terms of Use
2. Click **Send Connection Request**

## Send a Connection Request to [Cascade Natural Gas](#) to Begin Exchanging Data

[Cascade Natural Gas](#) requires the following information in order to exchange data with your property(ies). If you have any questions about how to complete this information, please contact [Cascade Natural Gas](#). Once your connection request has been accepted, you can share individual properties and/or meters with them to get started exchanging data.

Terms of Use:  
[040621.pdf](#)

[https://www.cngc.com/wp-content/uploads/PDFs/Conservation/portfolio\\_manager/CNG-TC-ENERGY-STAR-Portfolio-Mgr-040621.pdf](https://www.cngc.com/wp-content/uploads/PDFs/Conservation/portfolio_manager/CNG-TC-ENERGY-STAR-Portfolio-Mgr-040621.pdf)

Agreement:



\*  I agree to my provider's ([Cascade Natural Gas](#)) Terms of Use.



**Send Connection Request**

[Cancel](#)

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# 1 I need to Benchmark, Let's Connect

1. A Confirmation Notice will pop up that your connection was sent to Cascade Natural Gas.
2. After the connection is sent, email [EnergyReporting@cngc.com](mailto:EnergyReporting@cngc.com) to request a Cascade Utility Data Release form and alert Cascade of your Contact Connection Request.

The screenshot displays the ENERGY STAR Portfolio Manager web interface. At the top left is the ENERGY STAR logo and the text "ENERGY STAR® PortfolioManager®". To the right, there is a navigation menu with links for "Welcome", "Account", "Notifications" (with a red notification icon), "ENERGY STAR Notifications", "Settings", "CascadeNaturalGas:", "Contacts", "Help", and "Sign Out". Below the navigation menu are four tabs: "MyPortfolio", "Sharing", "Reporting", and "Recognition". A green-bordered box contains a confirmation message: "You have successfully accepted the selected request(s). For connection requests, you can now share properties with the person and/or view their contact information. For property share requests, you will now see the property in your portfolio. For transfer property requests, you are now the [Property Data Administrator](#) for the property(ies).". Below this message is a section titled "View All Notifications (0)" with three sub-tabs: "Incoming Requests (0)", "Outgoing Requests (0)", and "Notices (0)". The "Incoming Requests (0)" tab is active, and the content area below it states "You have no incoming request notifications." A blue "Close" button is located at the bottom right of the notification area. At the bottom of the page, there are social media icons for Twitter, Facebook, YouTube, and LinkedIn, followed by the text "Follow Us". On the far right, there are links for "Contact Us", "Privacy Policy", "Browser Requirements", and "ENERGY STAR Buildings & Plants Website".