# Builder Services Portal SDGE SDGE



**User Guide** 





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Logging In

Go to: https://www.sdge.com/builder-services/track

### **Creating an Account**

#### The Portal **Landing Page**

On the Builder Services home page, you can register for a new account or login to an existing account.

Using a login account will provide opportunity to:

- Submit new requests that will automatically be associated with your account
- Create a dashboard portfolio to view progress on all of your projects.

Alternatively, you can access a single project without an account by entering the Project or Job number and Access Code. You should have received your Access Code in your Welcome Package from SDG&E. \*

Once information is entered, click the Track button. Should you decide to not create an account, further instruction on the project tracker can be found in the Project Status **Tracker** section of this document.



\*NOTE: If you do not have your project number or access code, please reach out to your SDG&E Planner or Coordinator.



#### Register for an Account

Click the "Register" button in the top right corner of the landing page and then enter your account information.



It is important to select an e-mail address that you would like to use for the duration of your account. Your e-mail address will become your username and will not be able to be changed later.

(Should you need to change your e-mail later, you will need to create a new account).

Email Address •	Project Role •
	•
Password •	Confirm Password *
First Name •	Last Name •
Street Address •	Street Address (Line 2)
City •	State • Zip Code •
Phone Number •	Company Name
	•
☐ I have read and agree to the Terms o	f Use •
	Submit



### **Creating an Account, continued**

# **Selecting Your Company**

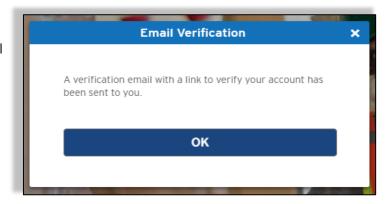
Select your company name from the dropdown list.

If your company is not listed, select Other. Selecting Other will prompt a secondary box for you to type in the name of your company.

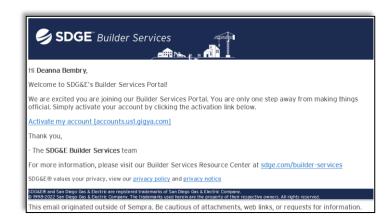


# Verify Your Account

Once you submit your account information, you will be sent an email verification.



Once you receive the verification email, click the link to activate your account.





### **Project Dashboard**

#### Adding Projects to the Dashboard

When first accessing your account, the dashboard will be empty.

You will need to enter a Project or Job number and Access Code. You should have received your **Project #** and Access Code from an SDG&E planner or coordinator.

Once information is entered, click the **Add Project** button.

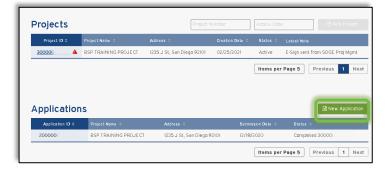


# Applications in the Dashboard

To submit a new service request, click **New Application**.

Applications submitted while logged in will automatically be reflected on your dashboard.

Any applications submitted while not logged in will not be visible in your account and cannot be added to your dashboard.





### **Project Dashboard**

#### Project Information

The Dashboard page will display the following for projects & applications:

- Project ID or Application ID
- Project name
- Address
- Creation Date
- Status
- Latest Note



# Applications becoming Projects

When applications are processed by SDG&E and become approved projects, the Status column under

**Applications** will display the new Project ID 300000----. The project will also be listed under

**Projects** with its new Project Number.





### **Project Summary Page**

# Project Tracking Information

The Project page will display the following:

- · Project start date
- Latest Updated Job #
- Project Updated Date
- Project # & Access Code
- Primary Customer & phone number
- Project Notes
- · Phase the job is in

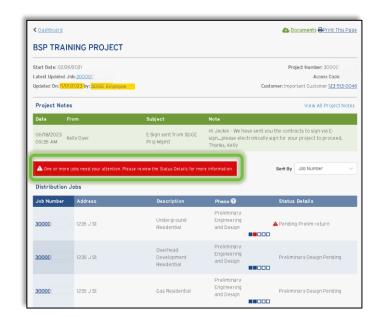
Q

Status details

Alert messages will display if pending information is required from the customer.

When the job is energized, the phase column will say **Complete.** 

NOTE: the Project Number and Access Code can be shared with other interested parties to give them visibility to the project



Click the **Phase Question Mark** (?) to see details for each phase.

Review details for each job by clicking on the job number.





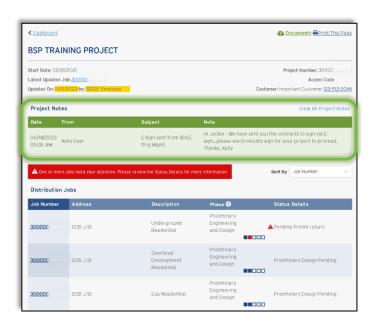
### **Project Summary Page**

#### **Project Notes**

Project Notes displays supplemental information regarding your project. These notes are created by your SDG&E planner or coordinator.

The details displayed are:

- Project Note Creation Date
- SDG&E Employee
- Project Note Subject
- Project Note



When there is more than one project note available, simply click **View All Project Notes** to review all notes.

\*NOTE: Project Notes may also be sent as emails to the primary contact listed on the account.



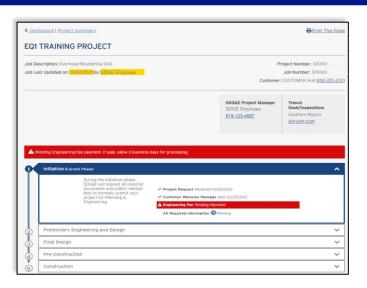


#### **Job Details**

Click on the job number to see the job's details.

Information contained on this page:

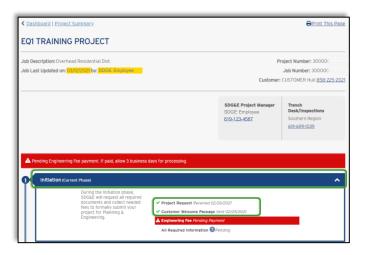
- · Description of the current phase
- Information requested from SDG&E (only if necessary)
- · Status of each milestone



To view details and milestones for each phase, you can expand the arrow for the particular phase.

Green check marks indicate information has been received and completed by the customer and/or SDG&E.

A red alert will display information that is pending from the customer and/or SDG&E.



Job Completion When the job is energized, all phase boxes will be displayed in blue and you'll see the word Completed.

#### Definition of Completed:

Distribution and Service work system energized

Master Service Orders – all meters have been set





# Permitting Information

If your job requires SDG&E to obtain a permit, you will see a **Permitting** section in the Job Details page.

Click on the **View Details** button next to Permitting to see the Permit Details.



The Permit Details page will display a table listing the following:

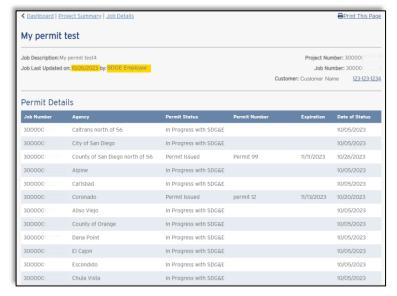
- Job Number
- Permit Agency
- Permit Status
- Permit Number
- · Permit Expiration Date
- Date of Status

Permit Status denotes who is working on the permit (SDG&E or the Issuing Agency).

#### **Status Options**

There may be various statuses in the Permit Status column:

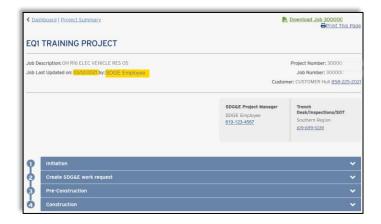
- In Progress with SDG&E
- In Progress with Issuing Agency
- · Permit Issued
- · No Permit Required
- · No Right of Way Permit Required



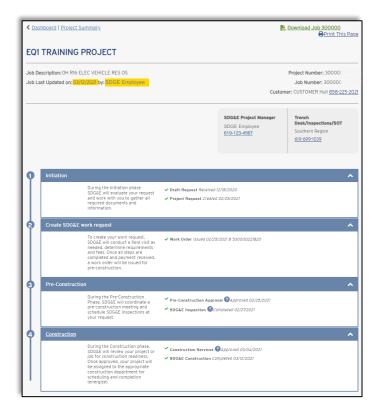


**Job Completion** 

When the job is complete, all phases are collapsed.



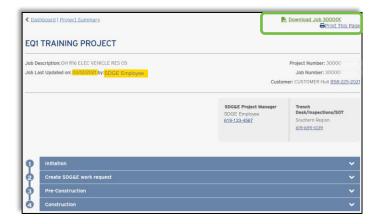
Click on any arrow to view completed milestones for each phase.



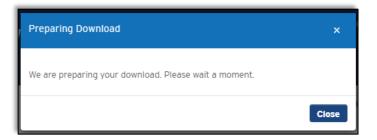


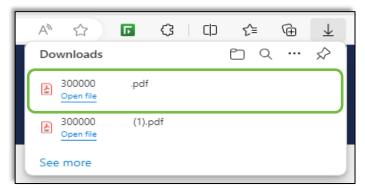
#### Download Service Order

When the Service job is complete, you can download the Service Order Document from the top right-corner of the Job Details screen.



A Preparing Download pop-up will appear before your file will be present in your Downloads folder.





You can also download the Service Order document from the Project Summary screen in the Service Jobs section.

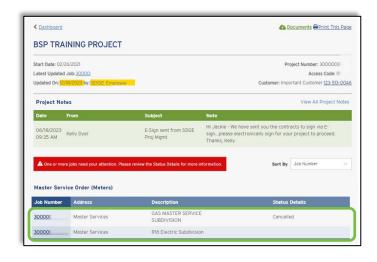
Simply click the PDF icon in the far-right column.





# **Master Service Orders**

Access information about your master service orders on the Project Summary Page. If your project has both gas and electric, each will have its own job notification number.



#### **Meter Details**

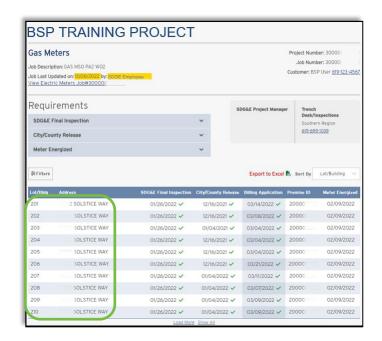
All addresses associated with the Master Service Order will be listed under the Job Number. You can easily see which milestones have been met and which are pending.

Address for **Subdivisions** will display each lot with the address.

Milestones that have been met will have a green checkmark.

If the billing application has not been received, a message will notify customer to submit an application.

If there is gas with electric, you can view the master service order by clicking the link "View Gas Meters Job #300000...." below the job number.

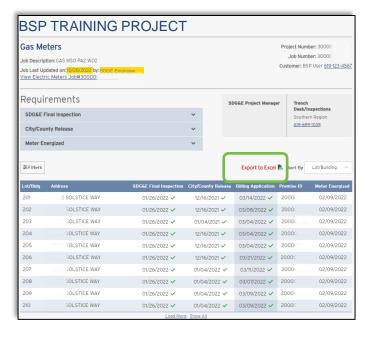




#### **Export to Excel**

Master service order information can be exported to excel from the Job Details screen.

Simply click the Export to Excel button to initiate the download.



Your data will be formatted in a table in excel as pictured.

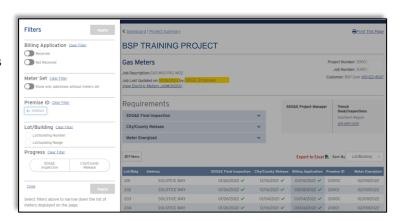
Gas						
Lot/Bldg		SDG&E Final Inspection	City/County Release	Billing Application	Premise ID	Meter Energized
201	SOLSTICE WAY	1/26/2022	12/16/2021	3/14/2022	2000012345	2/9/2022
202	SOLSTICE WAY	1/26/2022	12/16/2021	3/8/2022	2000012346	2/9/2022
203	SOLSTICE WAY	1/26/2022	1/4/2021	3/4/2022	2000012347	2/9/2022
204	SOLSTICE WAY	1/26/2022	12/16/2021	3/4/2022	2000012348	2/9/2022
205	SOLSTICE WAY	1/26/2022	12/16/2021	3/4/2022	2000012349	2/9/2022
206	SOLSTICE WAY	1/26/2022	12/16/2021	3/21/2022	2000012350	2/9/2022
207	SOLSTICE WAY	1/26/2022	1/4/2022	3/11/2022	2000012351	2/9/2022
208	SOLSTICE WAY	1/26/2022	1/4/2022	3/7/2022	2000012352	2/9/2022
209	SOLSTICE WAY	1/26/2022	1/4/2022	3/9/2022	2000012353	2/9/2022
210	SOLSTICE WAY	1/26/2022	1/4/2022	3/9/2022	2000012354	2/9/2022
211	SOLSTICE WAY	1/26/2022	1/4/2022	6/8/2022	2000012355	2/9/2022
212	SOLSTICE WAY	1/26/2022	1/4/2022	3/9/2022	2000012356	2/9/2022
213	SOLSTICE WAY	3/9/2022	4/6/2022	4/25/2022	2000012357	4/13/2022
	SOLSTICE WAY	3/9/2022	4/6/2022	3/28/2023	2000012358	4/13/2022
	SOLSTICE WAY	3/9/2022	4/6/2022		2000012359	4/13/2022
	SOLSTICE WAY	3/9/2022	4/6/2022		2000012360	4/13/2022
217	SOLSTICE WAY	3/9/2022	4/6/2022	4/27/2022	2000012361	4/13/2022
218	SOLSTICE WAY	3/9/2022	4/6/2022	4/25/2022	2000012362	4/13/2022
219	SOLSTICE WAY	4/21/2022	4/5/2022		2000012363	5/26/2022
	SOLSTICE WAY	4/21/2022	4/5/2022		2000012364	5/26/2022
	SOLSTICE WAY	4/21/2022	4/5/2022		2000012365	5/26/2022
222	SOLSTICE WAY	8/12/2022	8/4/2022		2000012366	8/25/2022
223	SOLSTICE WAY	8/12/2022	8/4/2022	9/7/2022	2000012367	8/25/2022



#### **Setting Filters**

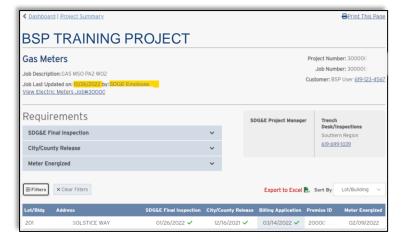
You have the ability to set filters to help with the amount of information displayed. When first accessing this page, make sure to clear all previous filters. You can select the data you want displayed by the following filters:

- Billing Application
  - Received
  - Not Received
- Meter Set
- Premise ID
- Lot/Building
- Progress
  - SDG&E Inspection
  - City/County Release



#### **Filter Results**

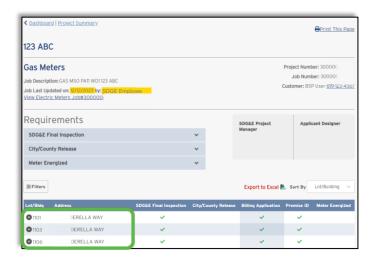
Once filters have been applied, only the information requested will display.

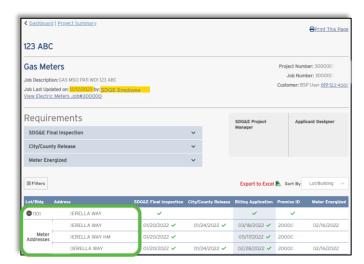




# Development Job Details

Address for **Developments** display the building number with a + sign. When you click the + sign, the individual units for each building will display.





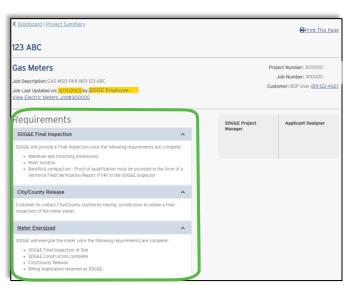


Milestones that have been met will have a green checkmark. Those that are pending will have a red triangle, along with a message in red indicating detailed information that is pending.

If a meter has been set, the meter set date will display.

This page also lists the milestones for meter sets.

If you want to set filters, click the Filters button.





### **Uploading Documents**

#### Document Upload Requirements

When logged into the Builder Services Portal, you will have the option to upload project documents to new applications being submitted, applications submitted while logged in, and projects in your dashboard



Ensure you are logged in at the time of submitting an application



#### File Criteria

Files must meet the following criteria to be uploaded:

- File name should not exceed 40 characters.
- File name can only include letters, numbers, dashes, underscore, spaces, and periods. No special characters such as \*&^%\$#@!()
- File size cannot exceed 100MB.
- Supported file formats: .XLS/XLSX, .DOC/DOCX, .PDF, .JPG/JPEG, .DWG.
- Type of Document is a required field.
- Total number of uploaded files cannot exceed 10.

Unsupported files will prompt an error message below your upload documents window.





### **Uploading Documents with a New Application**

# Uploading Documents

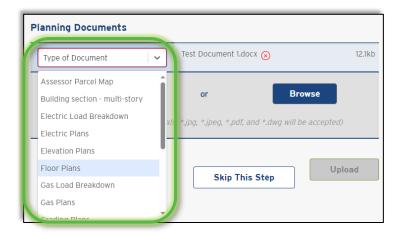
In step 6 of your application, select "Upload Documents" to navigate to the document upload page for your application.



#### Document Type

Manually browse for or drag and drop the files to upload.

Select an option from the "Type of Document" drop down menu that best describes each file.



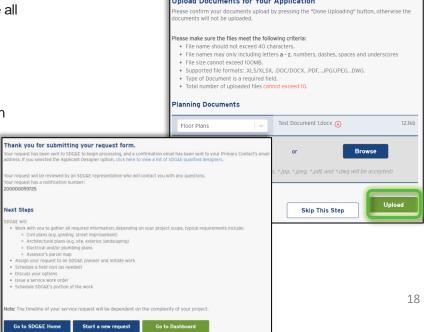
Upload Documents for Your Application

# Document Upload Confirmation

Select the "Upload" button once all necessary files have been uploaded.

You will be redirected to a new page confirming your application has been submitted.

You will receive an email confirming that your application has been submitted.



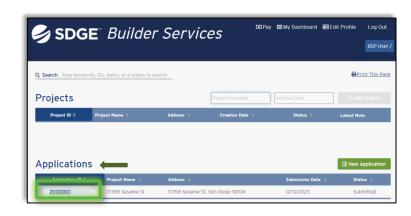


### **Uploading Documents to Existing Applications**

#### Navigating to Application Upload Page

Under the "Applications" header of your dashboard, select the "Application ID" for the application you want to upload documents to.

This will navigate you to the document upload page for your application.



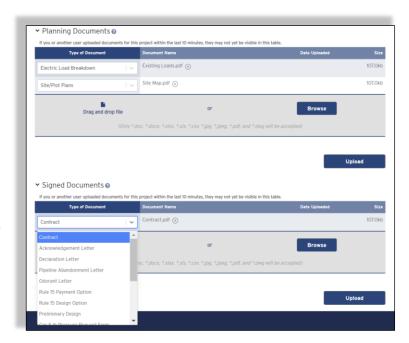
# **Uploading Documents**

Here you can upload planning documents or signed documents.

Manually browse for or drag and drop the files to upload.

Select an option from the "Type of Document" drop down menu that best describes each file.

Click the "Upload" button once all necessary files have been selected.



# **Upload Confirmation**

A green banner will confirm your upload.

You will receive an email confirming your documents have been uploaded.





r: BSP User <u>619-123-4567</u>

### **Uploading Documents for an Active Project**

Navigating to Document Upload Page

Under the "Projects" header of your dashboard, select the "Project ID" for the project you want to upload documents to.

This will navigate you to your Project Summary Page.



SDGE Builder Services

123 ABC



Select Documents on the Summary Page.

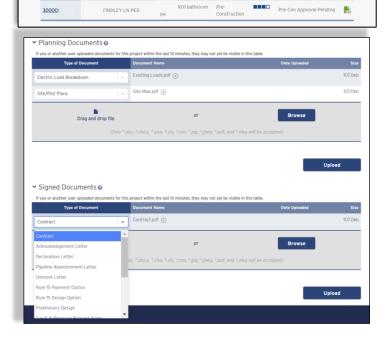
# Uploading Documents

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Manually browse for or drag and drop the files to upload.

Select an option from the "Type of Document" drop down menu that best describes each file.

Click the "Upload" button once all necessary files have been selected.



# Upload Confirmation

A green banner will confirm your upload.

You will receive an email confirming your documents have been uploaded.

