Builder Services Portal

User Guide

April 2022

Portal User Guide

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Logging In   Go to: http://www.sdge.com/builder-portal

Creating an Account

The Portal Landing Page

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

Using a login account will provide opportunity to:

- Submit new requests to automatically associate them with your account

- Create a dashboard to view progress on your projects.

Track a single project by entering the Project or Job number and Access Code.
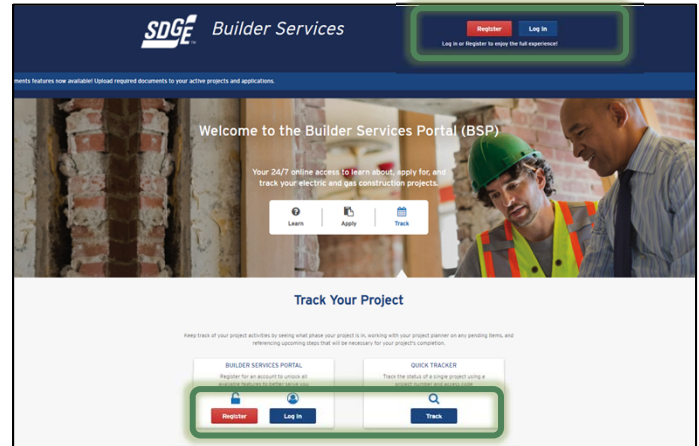
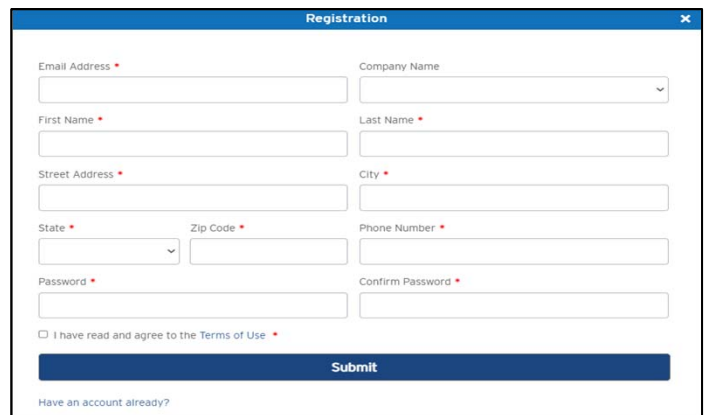*NOTE: If you do not have your project number or access code, please reach out to your SDG&E Planner or Coordinator.*

Register

Register for an Account

Click the "Register" button in the top right corner of the landing page and then enter your account information.
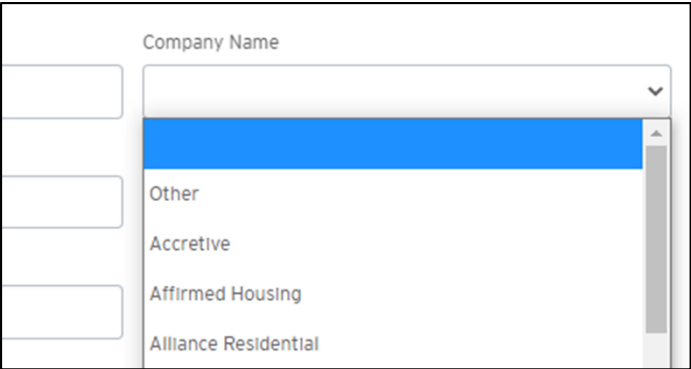
It is important to select an **e-mail address that you would like to use for the duration of your account.** Your e-mail address will become your username and will **not be able to be changed later.** *(Should you need to change your e-mail later, you will need to create a new account).*
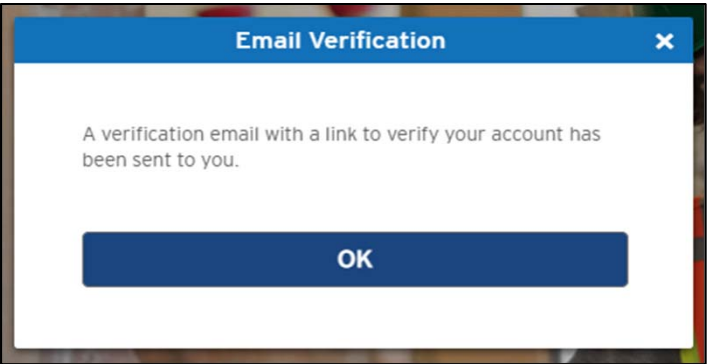
Selecting Your Company

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.

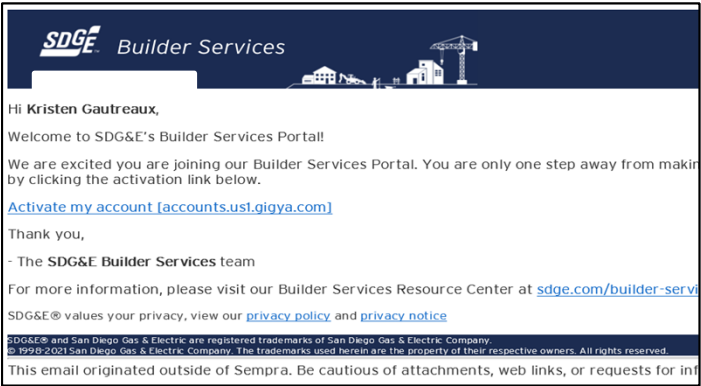Once you receive the verification e-mail, click the link to activate your account.

💡 You must validate your email to successfully create an account.

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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 the 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 logged in account and cannot be added to your dashboard.

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Project Dashboard

Project Information

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

- Project ID or Application ID
- Project name
- Address
- Creation or Submission date
- Status

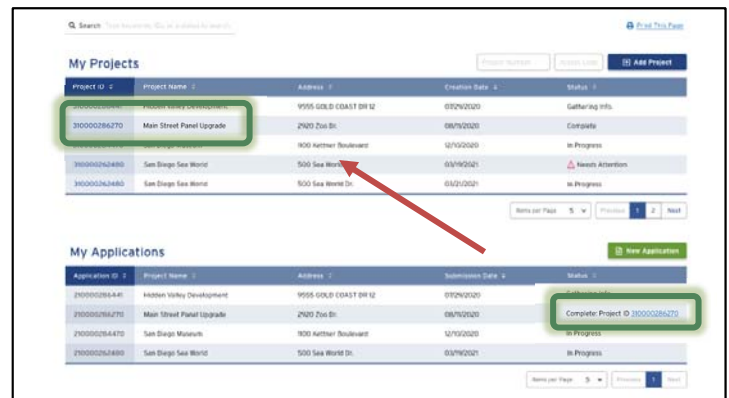**Applications becoming Projects**

When applications are processed by SDG&E and become approved projects, the Status column under **Applications** will display the new Project ID 3X--. The project will also be listed under **Projects** with its new Project Number.

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Project Summary Page

Project Tracking Information

The Project page will display the following:

• Project start date

• Primary customer & phone number
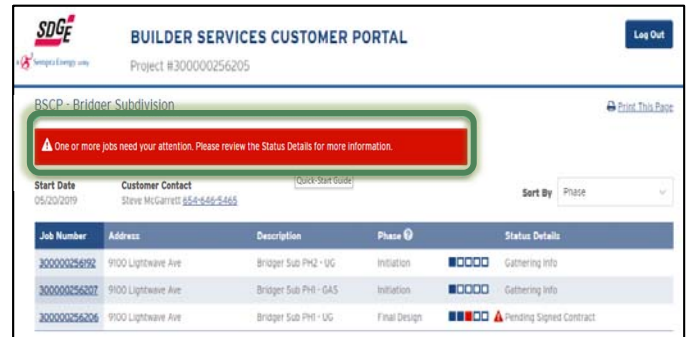
• Phase the job is in

• 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.**

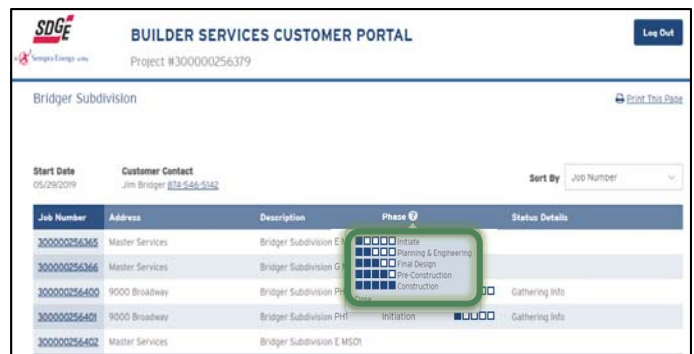Click the **Phase Question Mark (?)** to see details for each phase.

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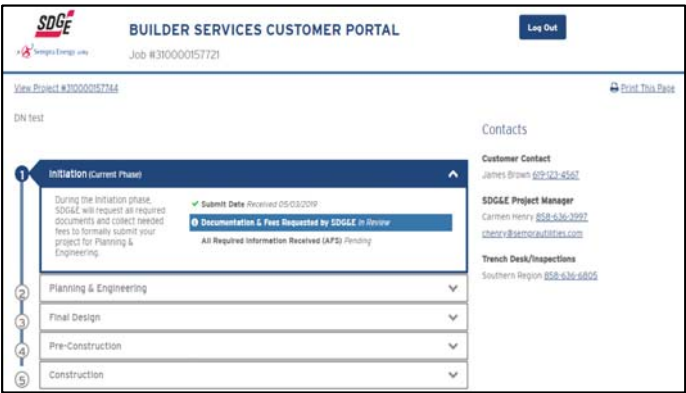
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Job Details

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

Information contained on this page:

- Description of the current phase
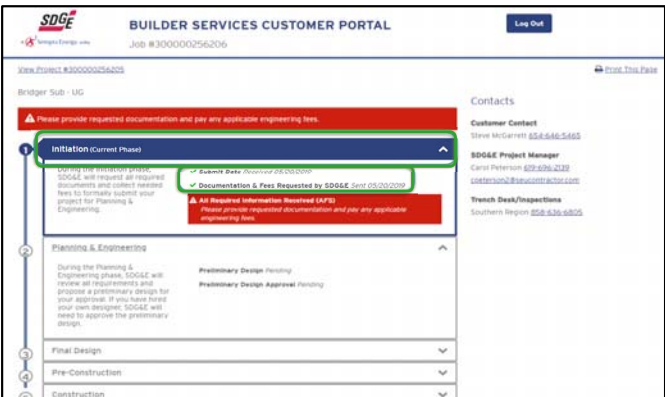- Information requested from SDG&E
- Status of each requirement

To view details and requirements 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, phase boxes will not display and you'll see the word **Complete.**

Definition of **Complete:**

Distribution work – system energized

Master Service Orders – all meters have been set

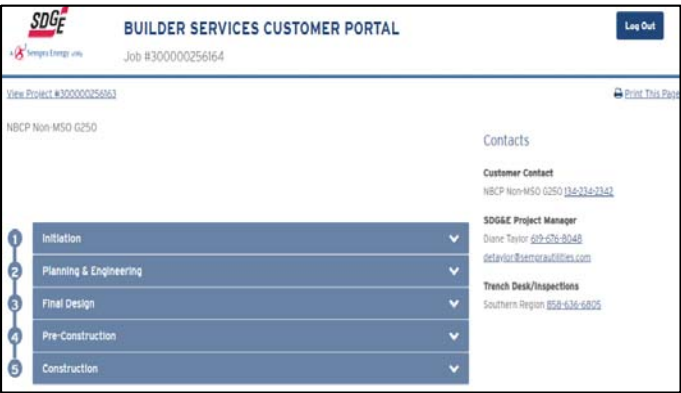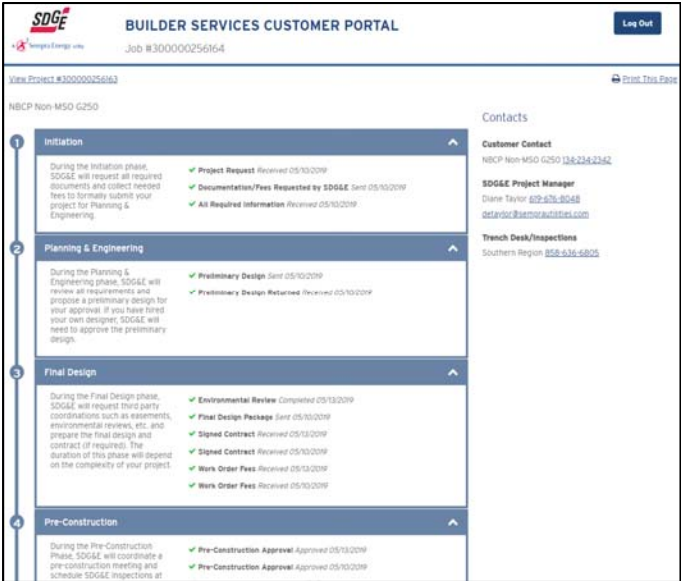Click on job notification number to collapse all phases.
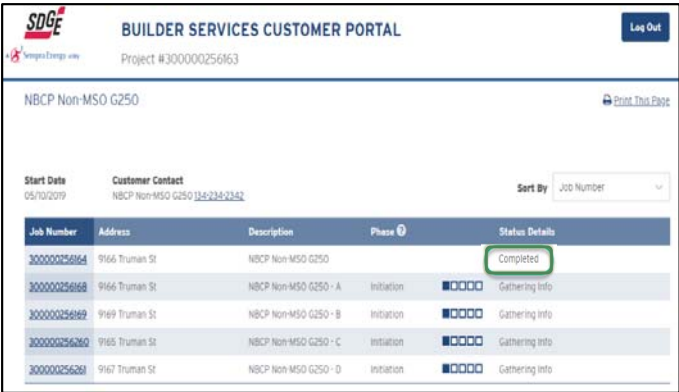
Job Completion

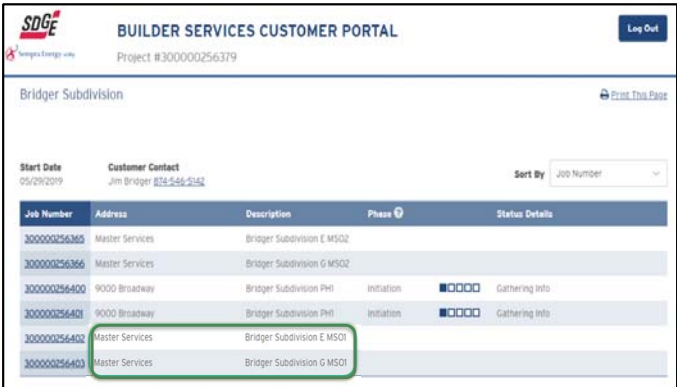When the job is complete, all phases are collapsed.

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

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Master Service Orders

Access information about your master service orders via the main page on the dashboard. If your project has both gas and electric, each will have their own job notification number.
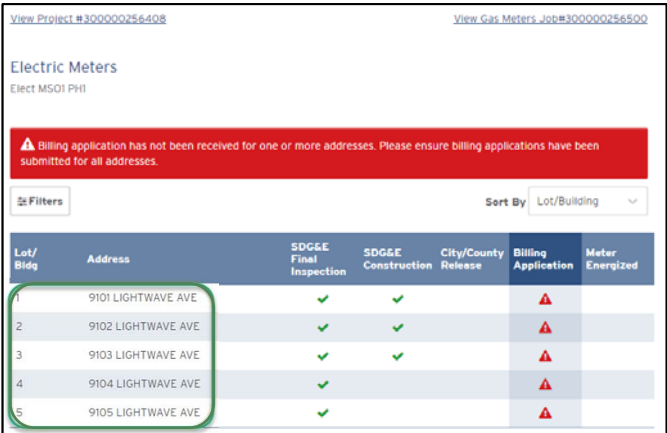
Subdivision Jobs Details

Each address on the order will be listed. You can see which requirements have been met and which are pending.

Address for Subdivisions will display each lot with the address.

Check marks indicate the current status for each lot.
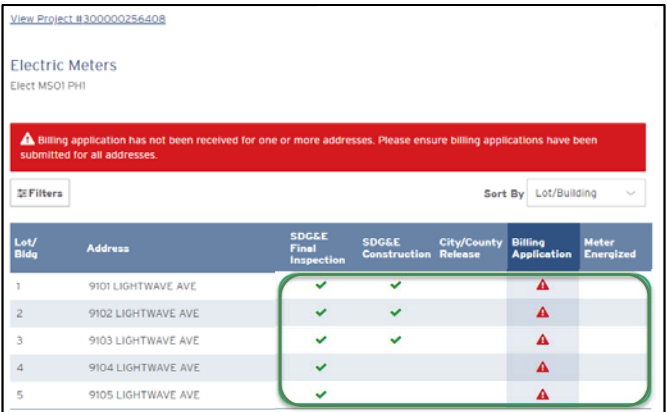
A message will notify the customer if the billing application has not been received.

Setting Filters

If preferred, set filters to help with the amount of information displayed. When first accessing this page, make sure to clear all previous filters. Select data to be displayed by using the following filters:

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

Filtering Results

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

Development Job Details

Addresses for Developments display the building number with a plus (+) sign. Click the plus (+) sign to display the individual units for each building.

Requirements 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 requirements for meter sets.

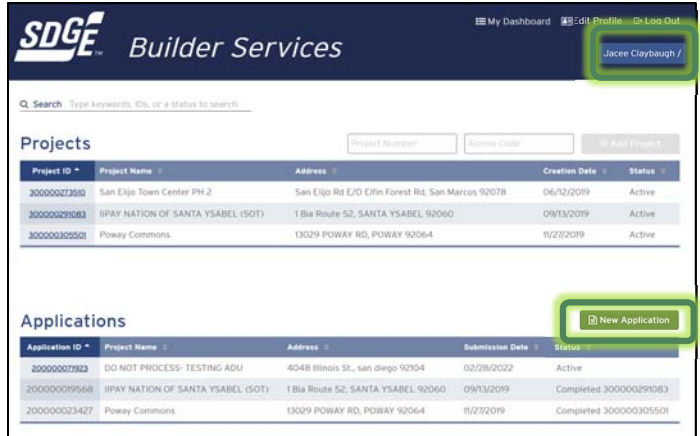To set filters, click the Filters button.

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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 like *&^%$#@!()
- 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.
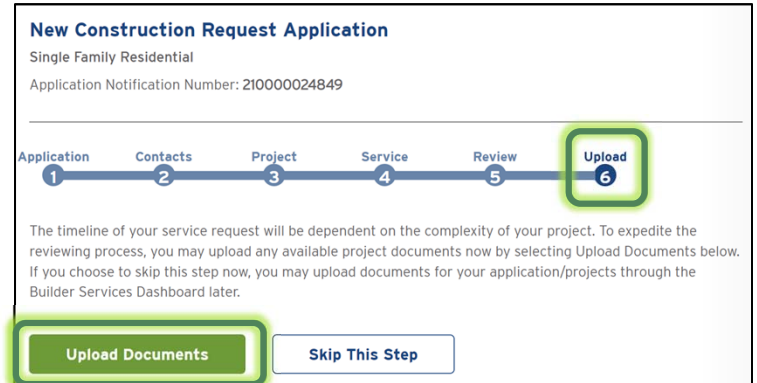
Uploading Documents with a New Application

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.
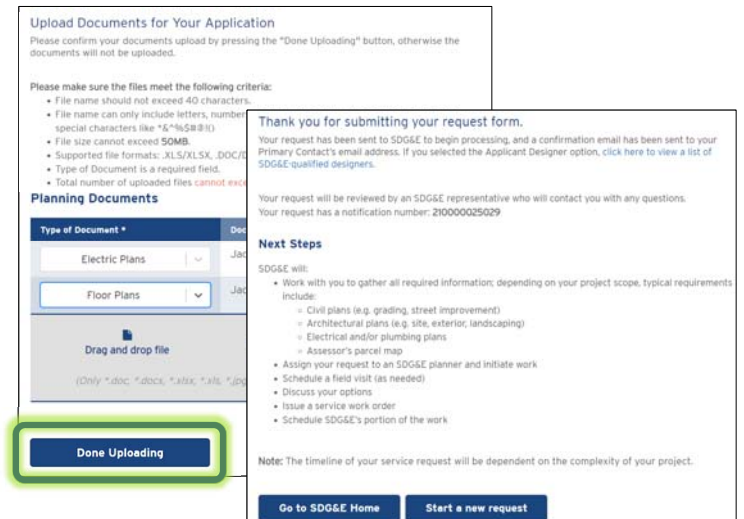
Document Upload Confirmation

Select the "Done Uploading" 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.

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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's Summary Page.

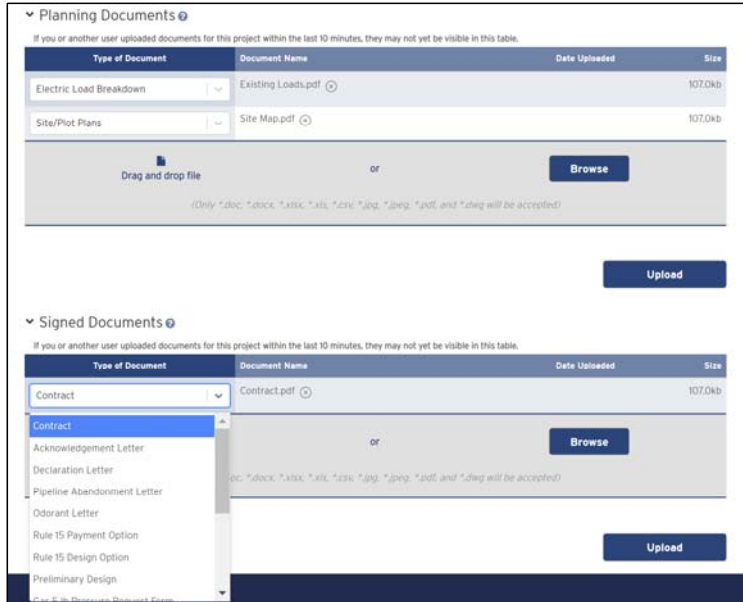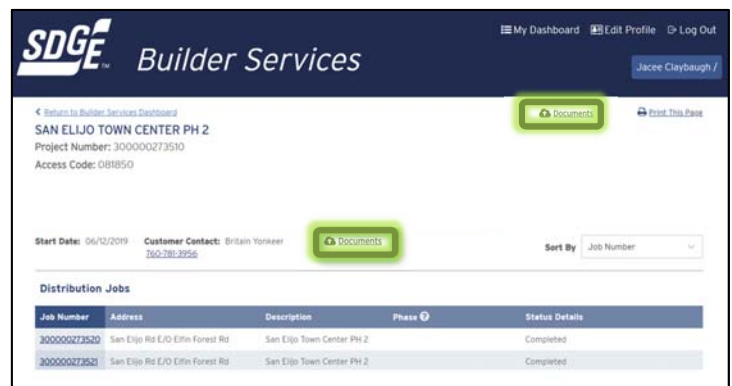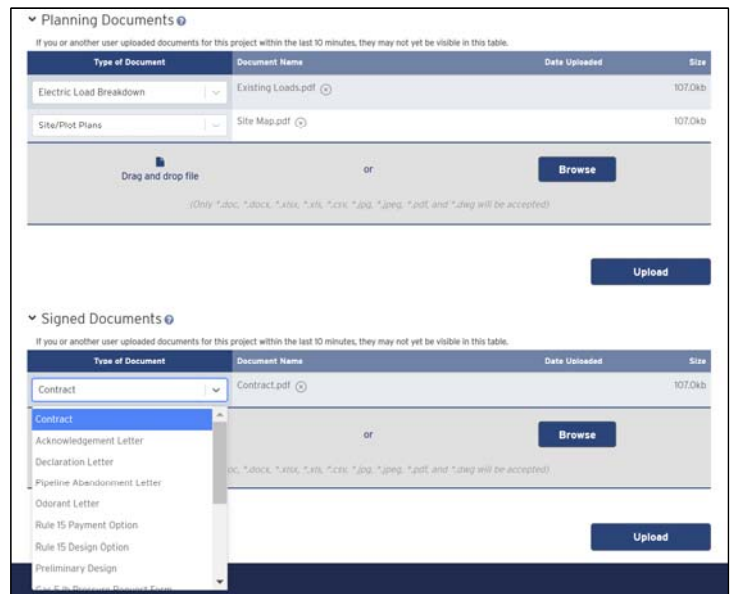Select ☁ **Documents** on the Summary Page.

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.