SDG&E Builder Services Customer Portal

Quick-Start Guide

Logging In

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

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 Now** 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.

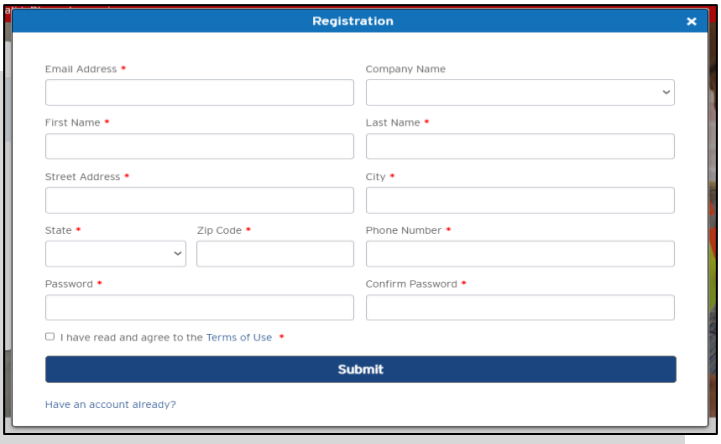
*NOTE: If you do not have your project number or access code, please reach out to your SDG&E Planner or Coordinator.

Register

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).*

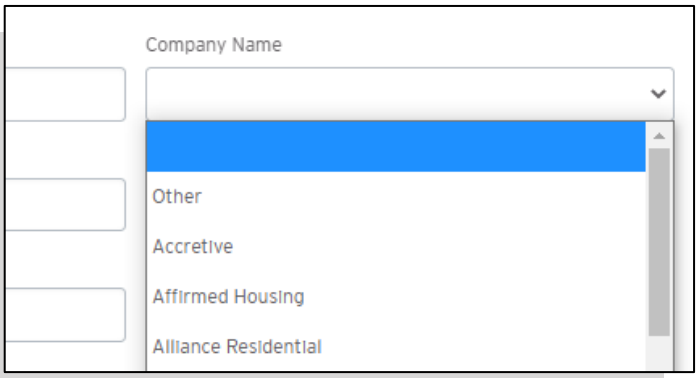


Quick-Start Guide

Selecting Your Company

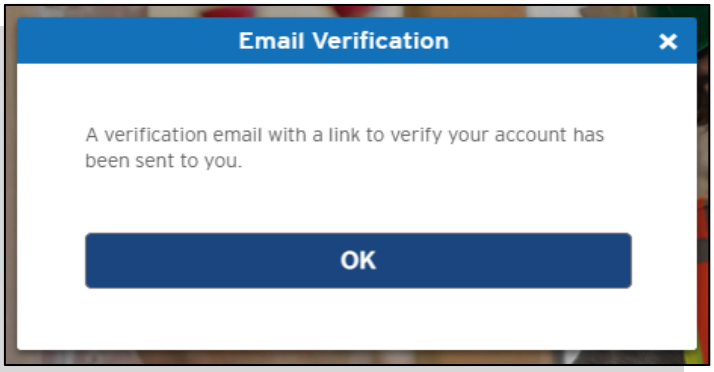
Select your company name from the dropdown list.

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.

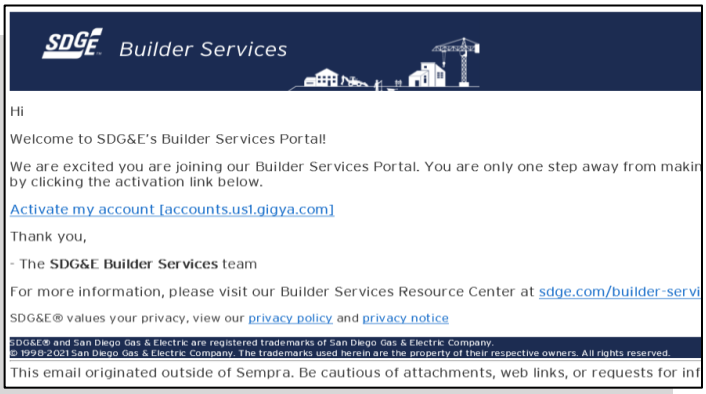


Verify Your Account

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.



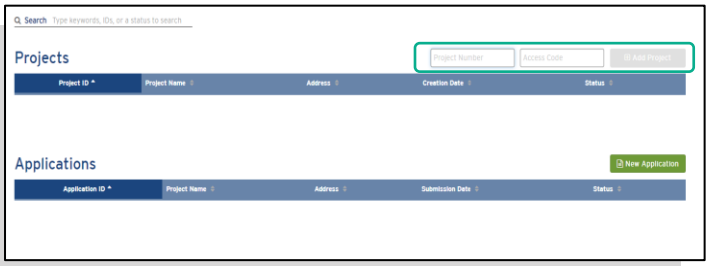
Quick-Start Guide

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 Access Code in your Welcome Package from SDG&E. Once information is entered, click the **Add Project** button.

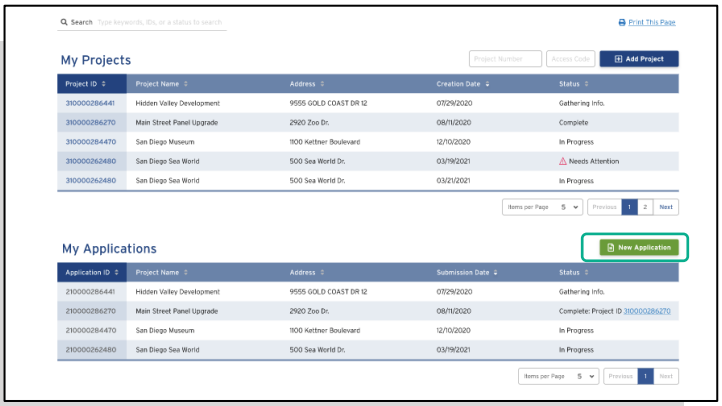


Adding Applications to the Dashboard

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.

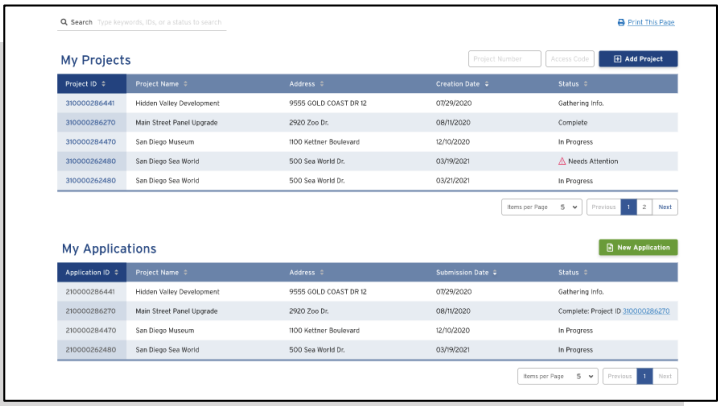


Quick-Start Guide

Project Dashboard

Project Information

The Dashboard page will display the following:



Projects:

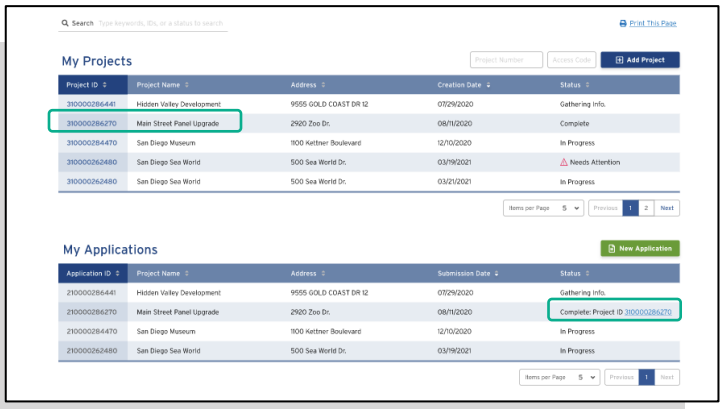
- Project ID
- Project name
- Address
- Creation Date
- Status

Applications:

- Application ID
- Project name
- Address
- Submission Date
- Status

Applications becoming Projects

When applications are finalized by SDG&E and become active 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.



Quick-Start Guide

Project Status Tracker

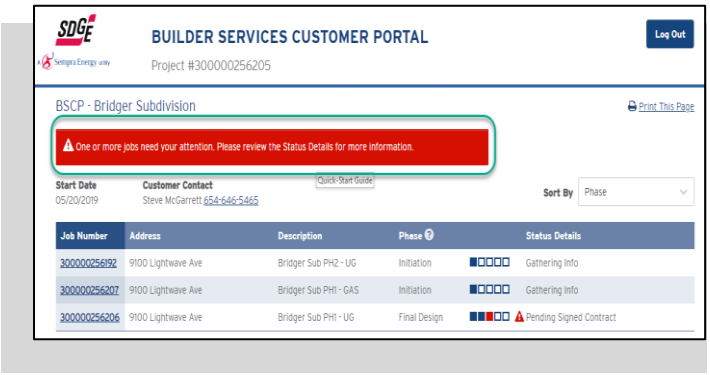
Project Information

The Project page will display the following:

- Project start date
- Primary customer & phone number
- Phase the job is in
- Status details

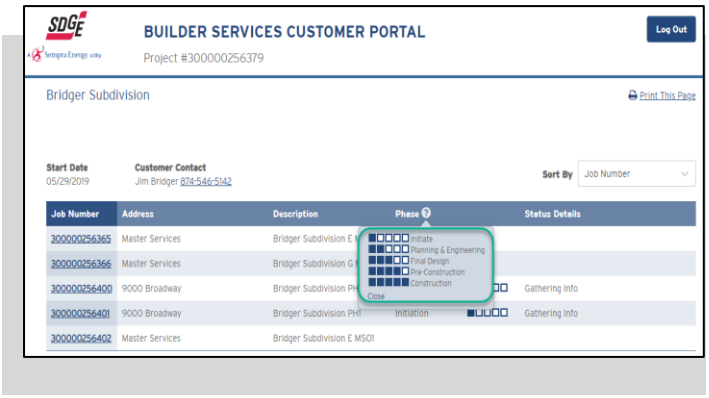
Alert messages will display if pending information is required from the customer.

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



Click the **Phase ?** to see details for each phase.

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



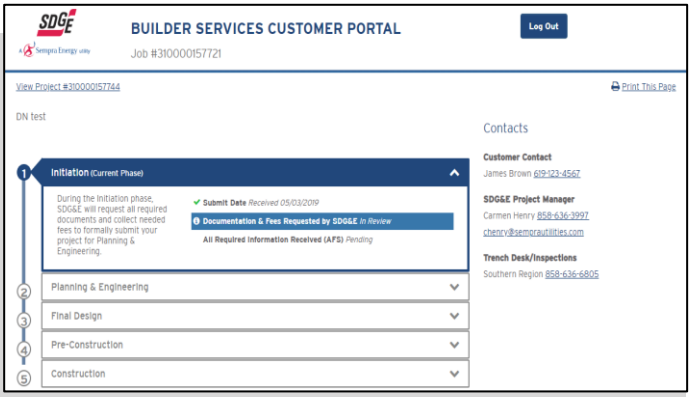
Quick-Start Guide

Job Details

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

Information contained on this page:

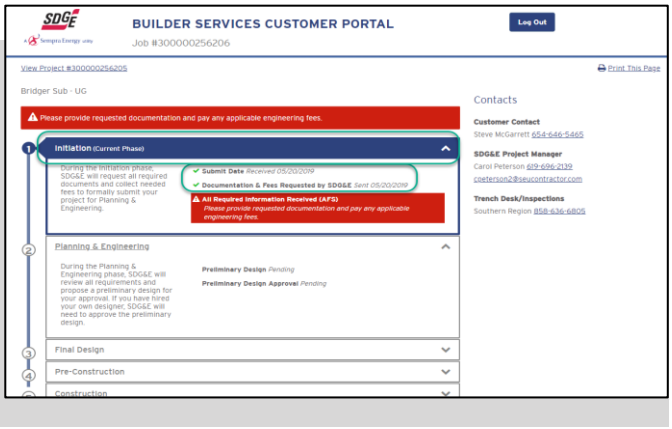
- Description of the current phase
- Information requested from SDG&E
- Status of each requirement



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

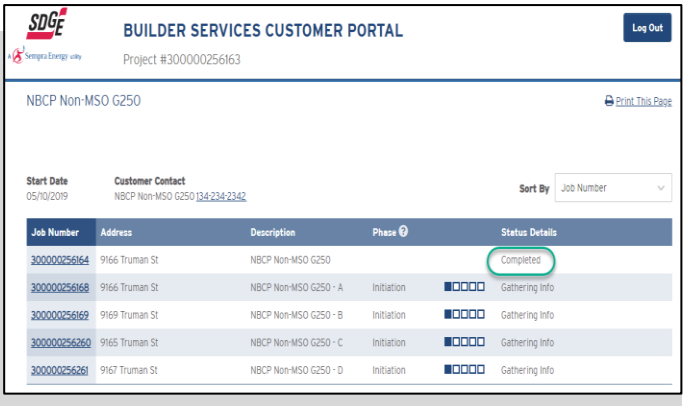
When the job is energized, phase boxes will not display and you'll see the word **Complete.**

Definition of **Complete:**

Distribution work – system energized

Master Service Orders – all meters have been set

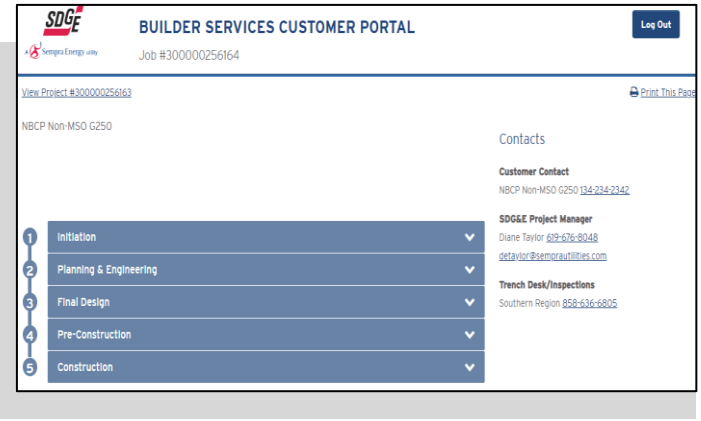
Click on job notification number to collapse all phases.



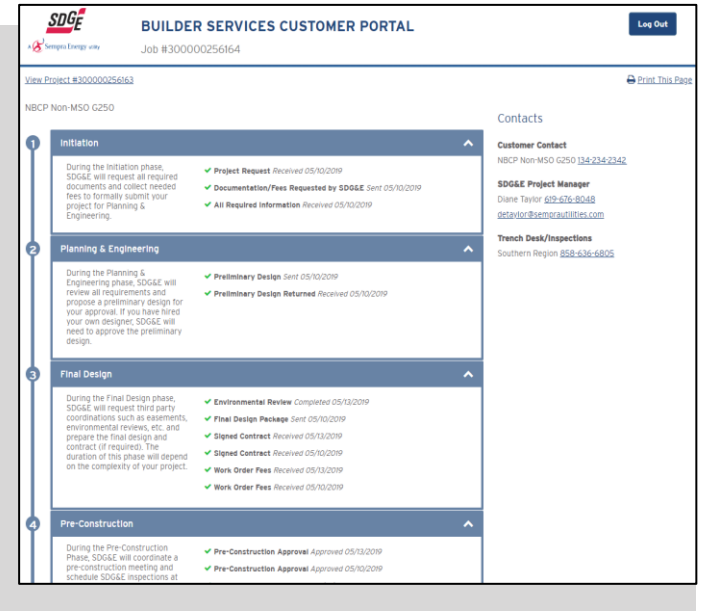
Quick-Start Guide

Job Completion

When the job is complete, all phases are collapsed.



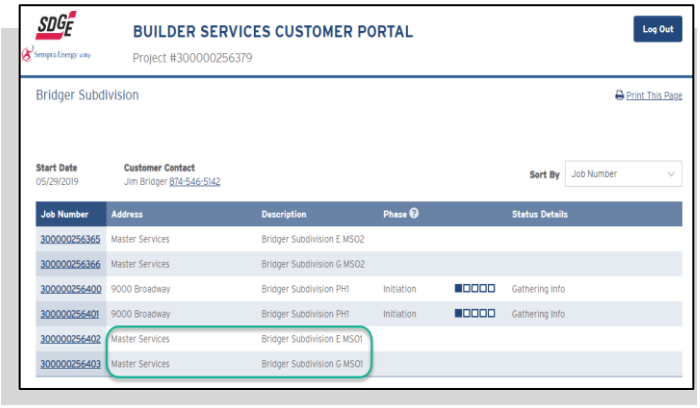
Click on any arrow to view completed requirements for each phase.



Quick-Start Guide

Master Service Orders

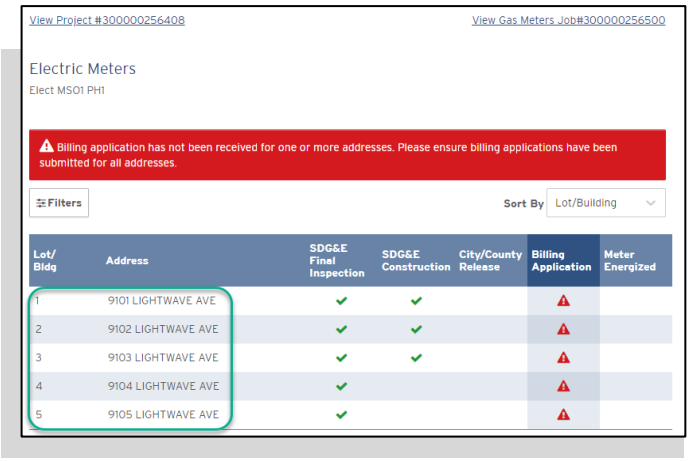
Access information about your master service orders via the main page on the dashboard. If your project has both gas and electric, each will have their own job notification number.



Job Details

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

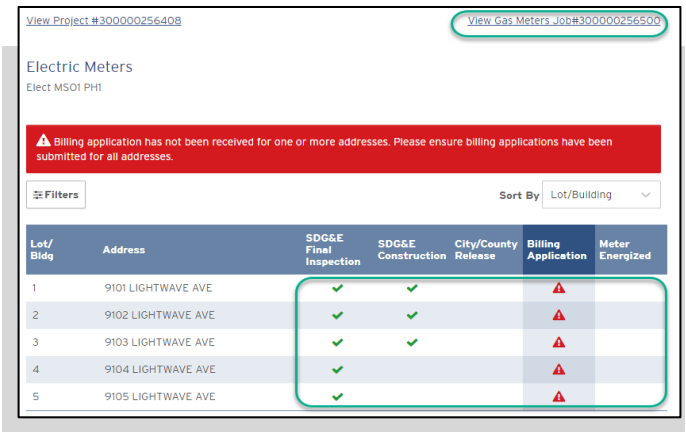
Address for **Subdivisions** will display each lot with the address.



Check marks indicate the current status for each lot.

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

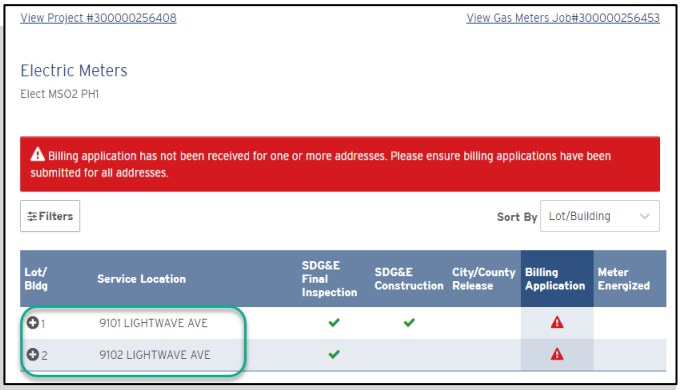
If there is gas with electric, you can view the master service order by clicking the link.

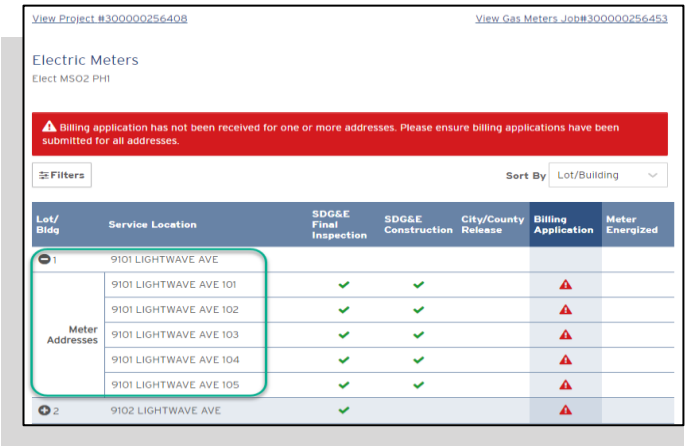


Quick-Start Guide

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.



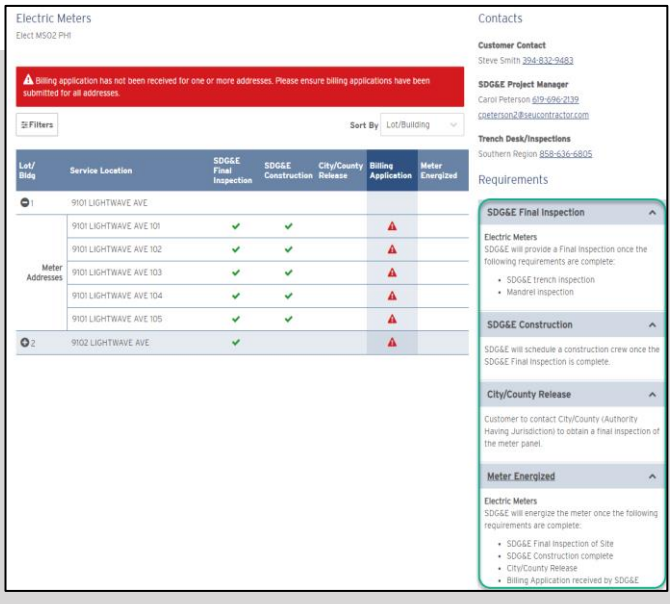


Requirements that have been met will have a green checkmark. Those that are pending will have a red triangle, along with a message in red indicating detailed information that is pending.

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

This page also lists the requirements for meter sets.

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

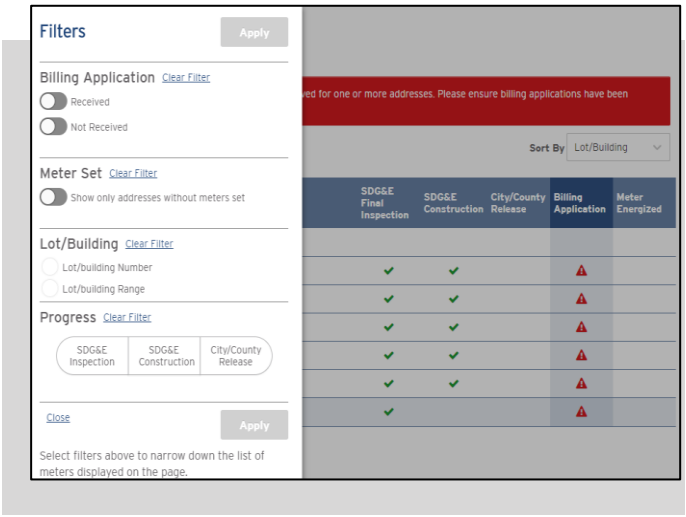


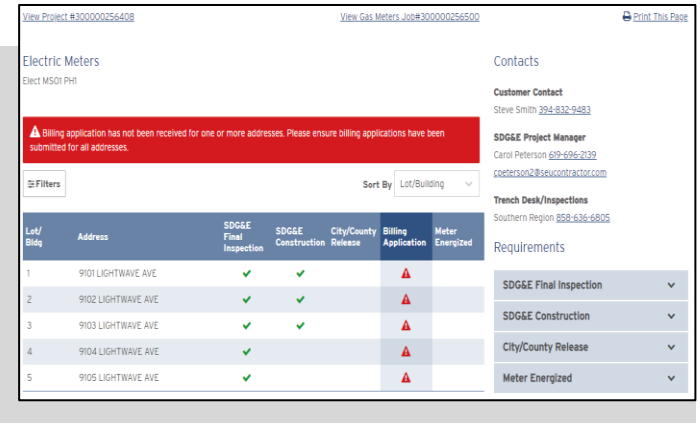
Quick-Start Guide

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
- Lot/Building
- Progress
  - SDG&E Inspection
  - SDG&E Construction
  - City/County Release



Filter Results

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