Builder Services Portal

User Guide

SDGE™

April 2024

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Quick-Start Guide

![SDGE logo]

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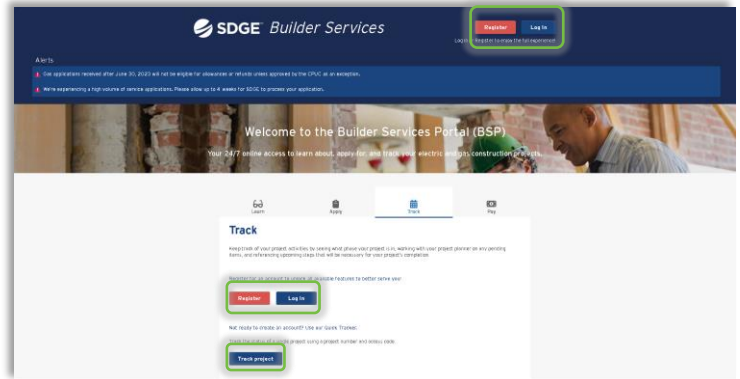
NOTE: If you do not have your project number or access code, please reach out to your SDG&E Planner or Coordinator.

Register

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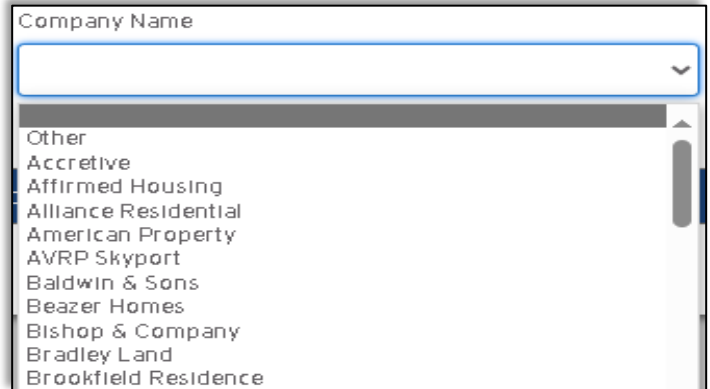
(Should you need to change your e-mail later, you will need to create a new account).

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Creating an Account, continued
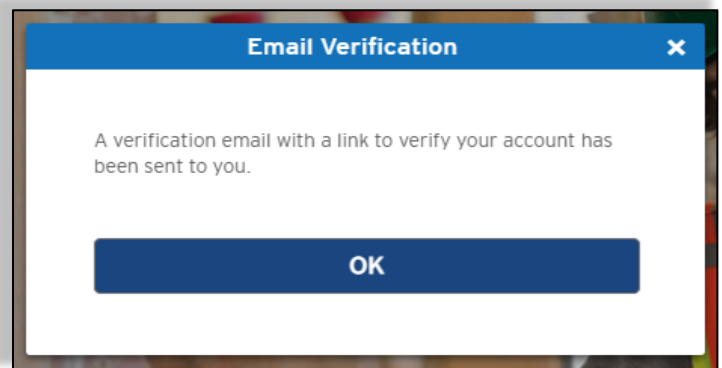
Selecting Your Company

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.
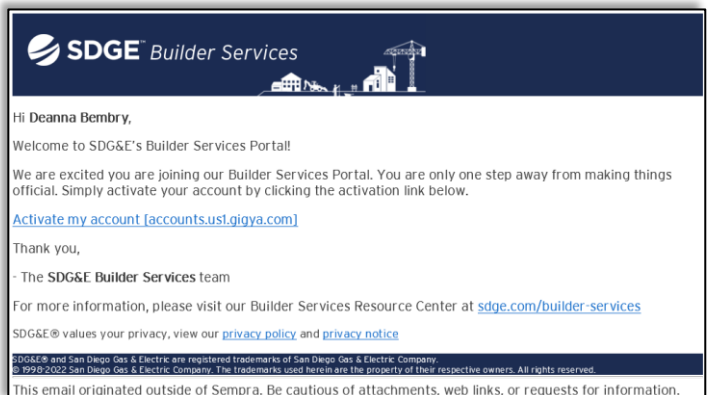
Company Name

Other
Accretive
Affirmed Housing
Alliance Residential
American Property
AVRP Skyport
Baldwin & Sons
Beazer Homes
Bishop & Company
Bradley Land
Brookfield Residence

Verify Your Account

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

Email Verification ✕

A verification email with a link to verify your account has been sent to you.

OK

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

SDGE™ Builder Services

Hi Deanna Bembry,

Welcome to SDG&E's Builder Services Portal!

We are excited you are joining our Builder Services Portal. You are only one step away from making things official. Simply activate your account by clicking the activation link below.

Activate my account [accounts.us1.gigya.com]

Thank you,

- The **SDG&E Builder Services** team

For more information, please visit our Builder Services Resource Center at sdge.com/builder-services

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This email originated outside of Sempra. Be cautious of attachments, web links, or requests for information.
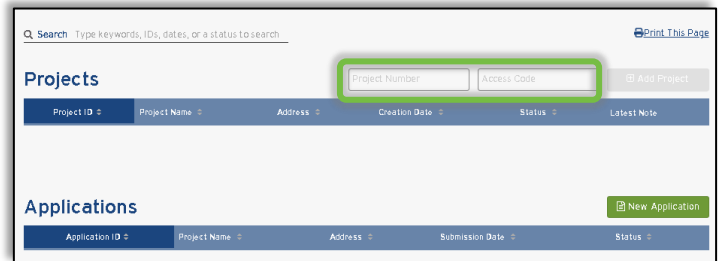
Project Dashboard

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.

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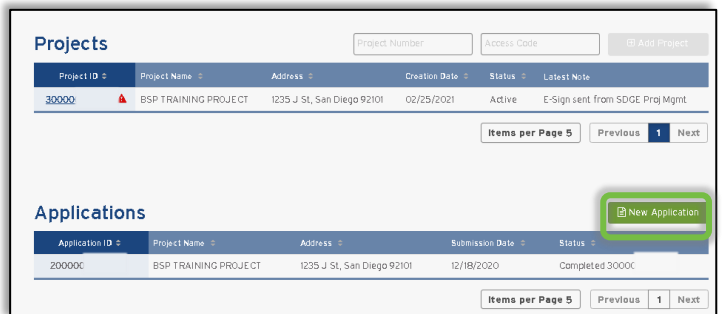
Project Dashboard

Project Information

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

- Project ID or Application ID
- Project name
- Address
- Creation 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
- 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.

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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.

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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 (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

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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

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Job Completion

When the job is complete, all phases are collapsed.

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

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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.
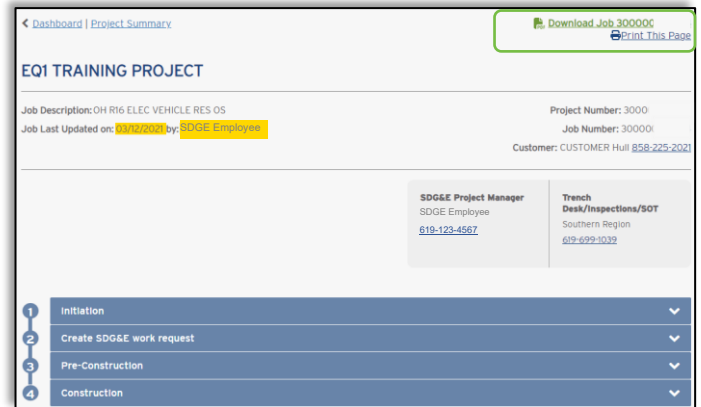
A Preparing Download pop-up will appear before your file will be present in your Downloads folder.
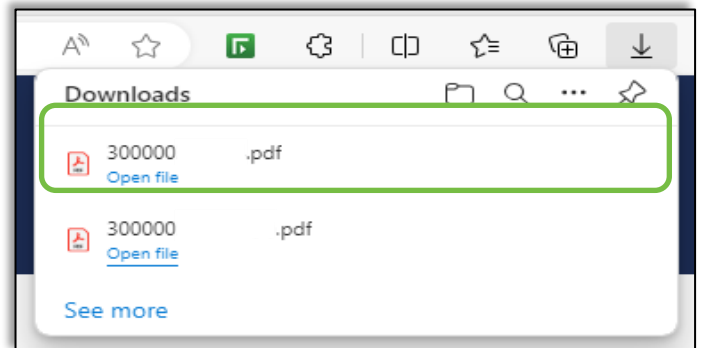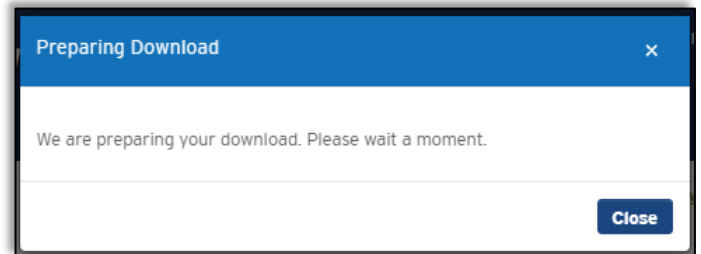
You can also download the Service Order document from the Project Summary screen in the Service Jobs section.

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.

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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.

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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.

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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.

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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
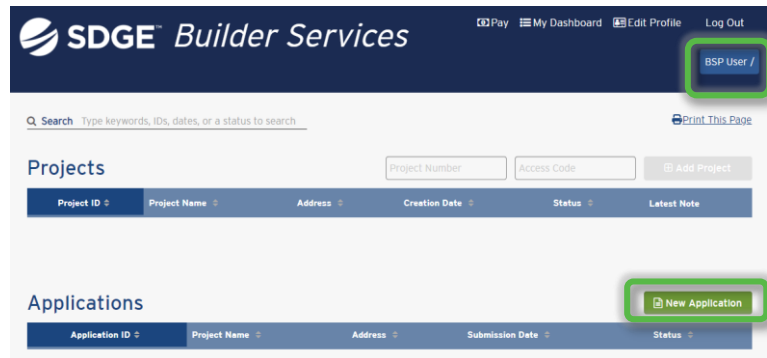
File Criteria

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 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.

Quick-Start Guide
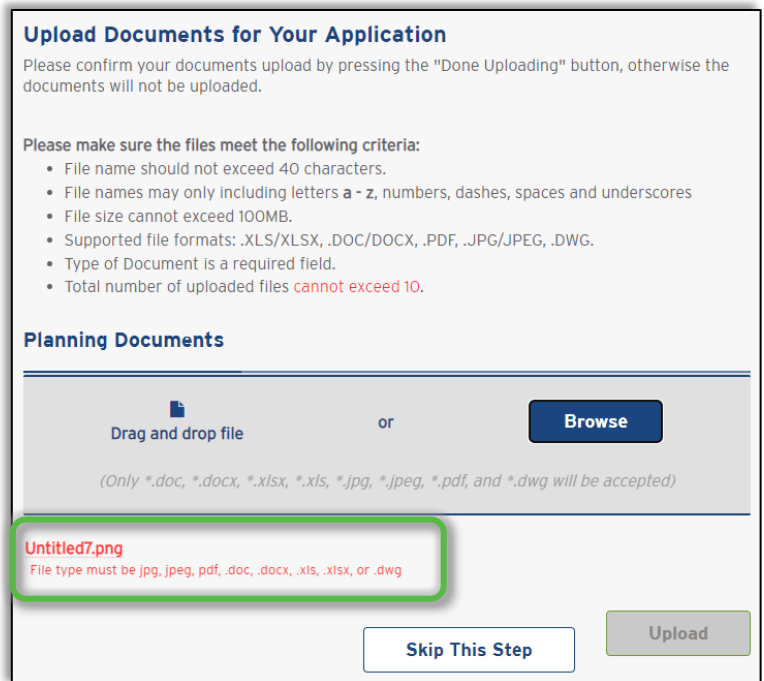
Uploading Documents with a New Application

Uploading Documents

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

Application Notification Number: 200000093725

| Step 1: Project Type | Step 2: Application | Step 3: Documentation |

Application 1 · Contacts 2 · Project 3 · Service 4 · Review 5 · Upload 6

- To expedite the review process, please upload your project documents by selecting "upload documents" below.
- Alternatively, you can "skip this step" and provide documents later as requested.
- The timeline of your service request will be dependent on the complexity of your project.

[Upload Documents] [Skip This Step]

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.

Planning Documents

Type of Document ⌄

- Assessor Parcel Map
- Building section - multi-story
- Electric Load Breakdown
- Electric Plans
- Elevation Plans
- Floor Plans
- Gas Load Breakdown
- Gas Plans
- Grading Plans

Test Document 1.docx ⊗ 12.1kb

or [Browse]

(.xls *.jpg, *.jpeg, *.pdf, and *.dwg will be accepted)

[Skip This Step] [Upload]

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.

Upload Documents for Your Application

Please confirm your documents upload by pressing the "Done Uploading" button, otherwise the documents will not be uploaded.

Please make sure the files meet the following criteria:
- File name should not exceed 40 characters.
- File names may only including letters a - z, numbers, dashes, spaces and underscores
- 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.

Planning Documents

Floor Plans ⌄   Test Document 1.docx ⊗ 12.1kb

or [Browse]

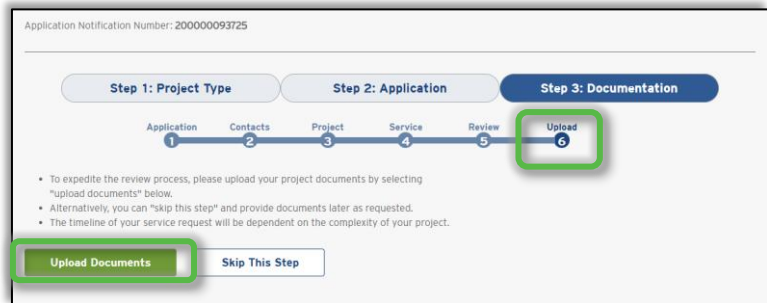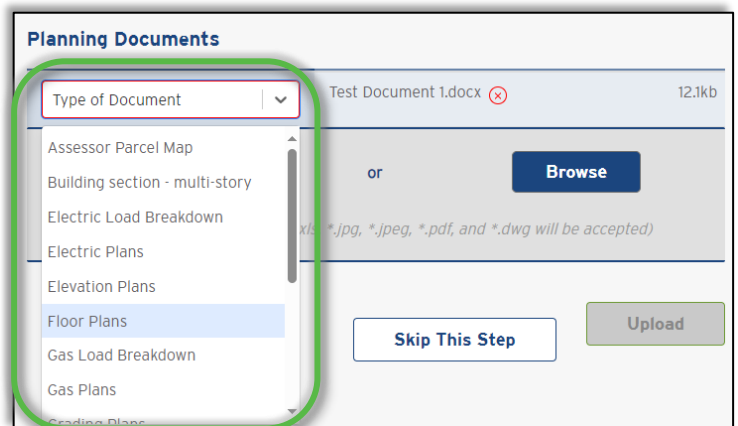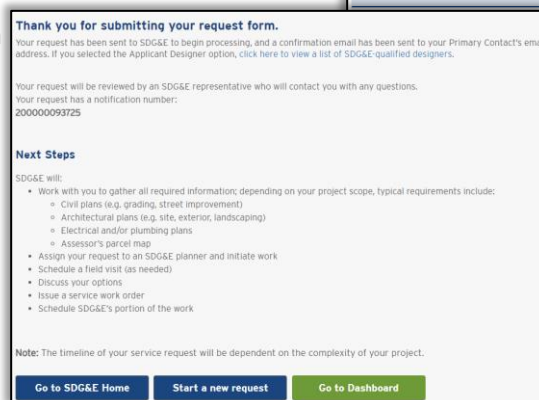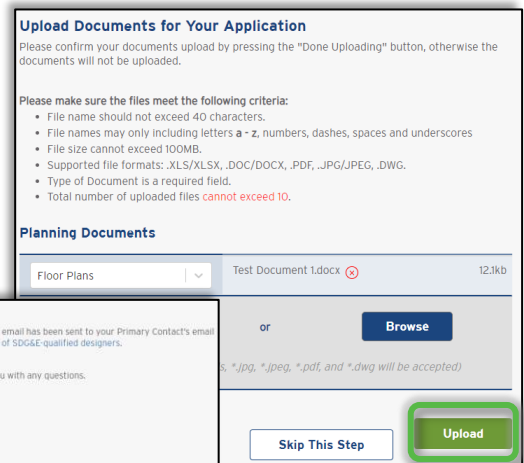*.jpg, *.jpeg, *.pdf, and *.dwg will be accepted)

[Skip This Step] [Upload]

Thank you for submitting your request form.

Your request has been sent to SDG&E to begin processing, and a confirmation email has been sent to your Primary Contact's email address. If you selected the Applicant Designer option, click here to view a list of SDG&E-qualified designers.

Your request will be reviewed by an SDG&E representative who will contact you with any questions. Your request has a notification number: 200000093725

Next Steps

SDG&E will:
- Work with you to gather all required information; depending on your project scope, typical requirements include:
  - Civil plans (e.g. grading, street improvement)
  - Architectural plans (e.g. site, exterior, landscaping)
  - Electrical and/or plumbing plans
  - Assessor's parcel map
- Assign your request to an SDG&E planner and initiate work
- Schedule a field visit (as needed)
- Discuss your options
- Issue a service work order
- Schedule SDG&E's portion of the work

Note: The timeline of your service request will be dependent on the complexity of your project.

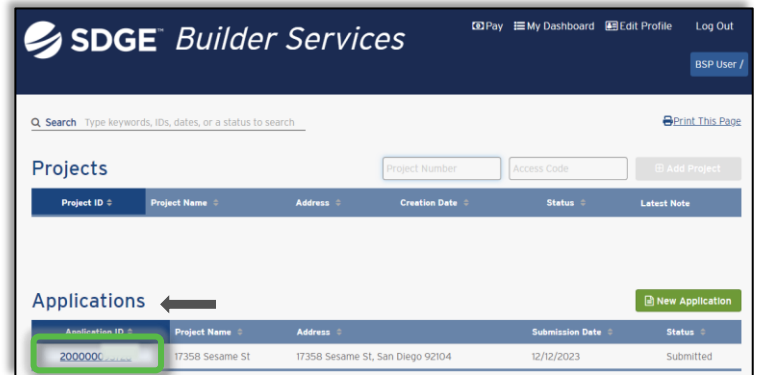[Go to SDG&E Home] [Start a new request] [Go to Dashboard]

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.
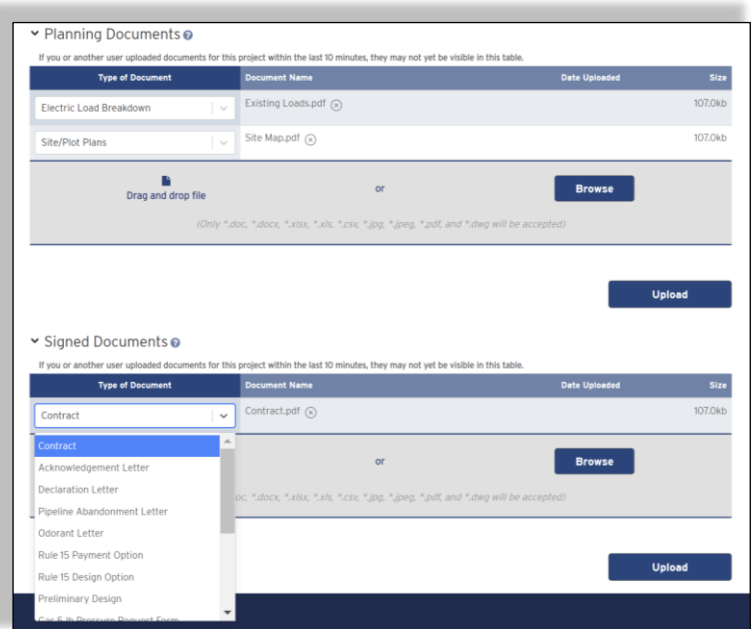

Uploading Documents

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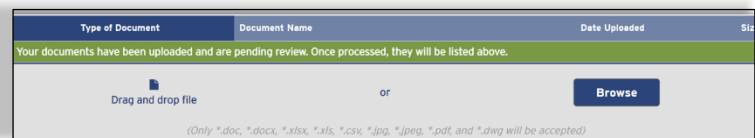
Click the "Upload" button once all necessary files have been selected.

Upload Confirmation

A green banner will confirm your upload.

You will receive an email confirming your documents have been uploaded.
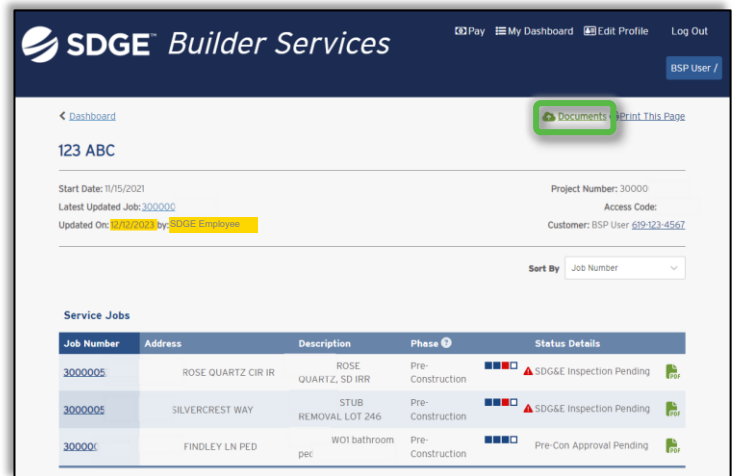
Uploading Documents for an Active Project

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.

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

Uploading Documents

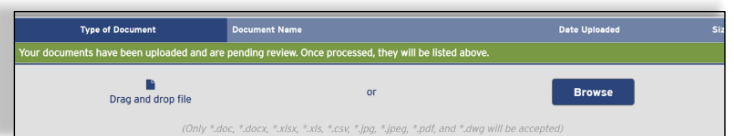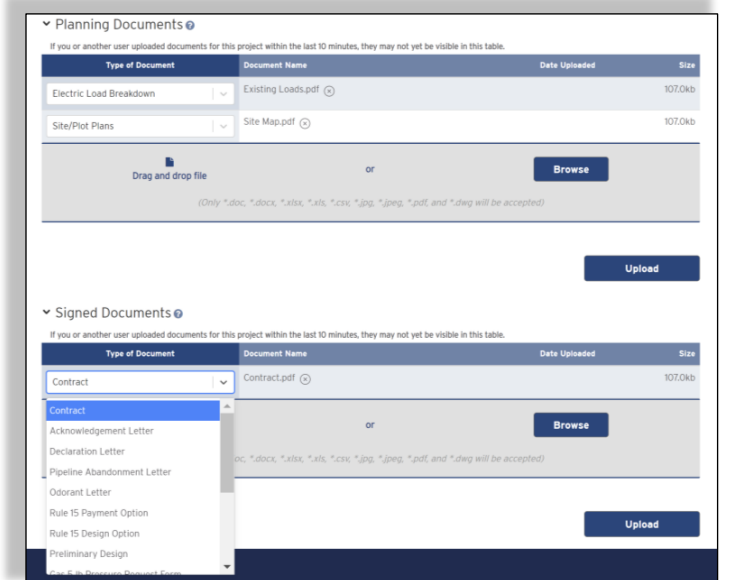Here you can upload planning documents or signed documents.

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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.

A green banner will confirm your upload.

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

Upload Confirmation