

We Energies

Builder Portal Reference Guide



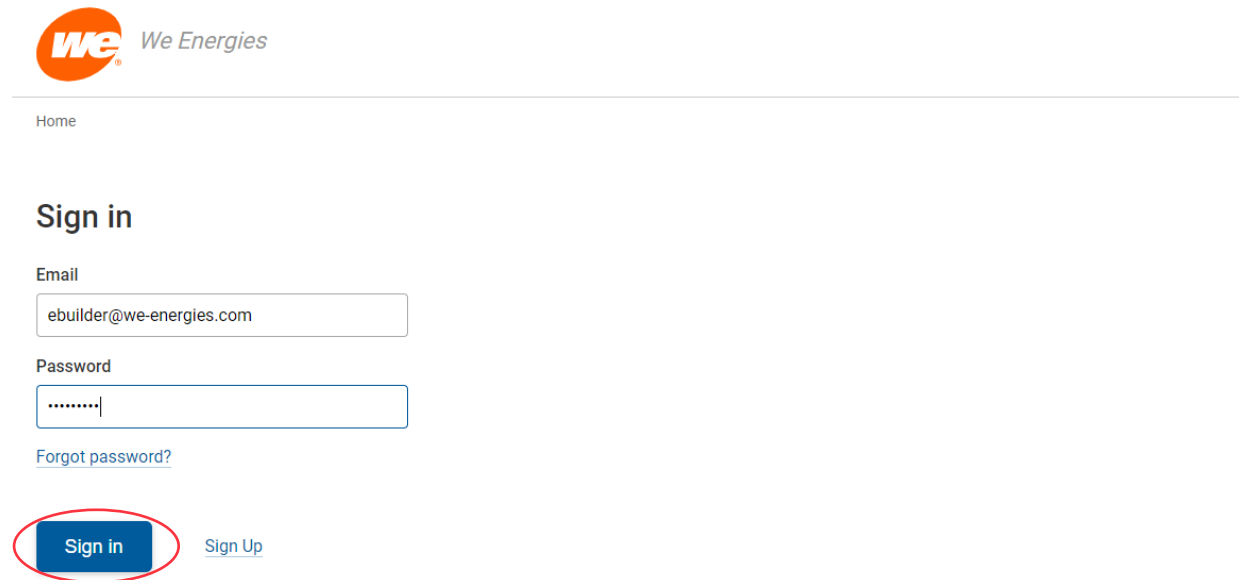
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Signing in to the portal

Please use Google Chrome when accessing the Builder Portal. Save the below URL as a bookmark.

1. Go to www.we-energies.com/partners/builders. Select **Builder Portal**.
2. You should see the sign-in screen. Enter your email address and password. Select **Sign in**.



Home

Sign in

Email

Password

[Forgot password?](#)

[Sign in](#) [Sign Up](#)

Portal home screen

You have three options on the home screen of the Builder Portal.

1. **Service requests** — Search or add service requests.
2. **My builder profile** — Update builder profile, contact list and sub-contractor list.
3. **Sign out**.



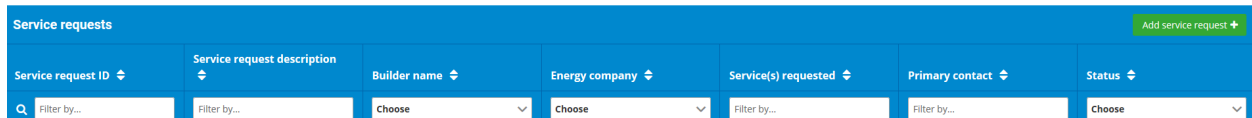
NOTE: First-time users, update your profile by selecting **My builder profile**.

Tip: Save time in your service request by adding a project manager and primary contact.

Service requests screen

Searching service requests — You can enter specific information to search for a service request. Details may be entered in any of the below fields:

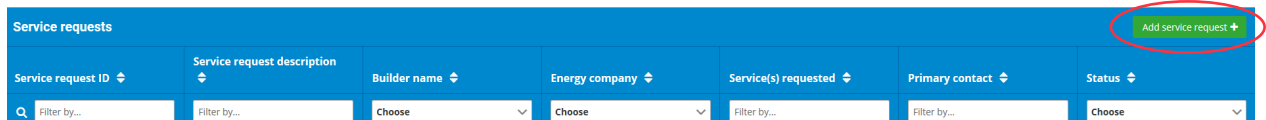
- Service request ID
- Service request description
- Contractor name
- Energy company
- Status



The screenshot shows the 'Service requests' interface. At the top right, there is a green button labeled 'Add service request +'. Below it is a table with columns: 'Service request ID', 'Service request description', 'Builder name', 'Energy company', 'Service(s) requested', 'Primary contact', and 'Status'. Each column has a search or filter input field below it. The 'Builder name' and 'Energy company' columns have dropdown menus with 'Choose' selected. The 'Service(s) requested' column has a 'Filter by...' input. The 'Primary contact' column has a 'Filter by...' input. The 'Status' column has a dropdown menu with 'Choose' selected.

Adding a service request

1. Select **Add service request**.



This screenshot is identical to the one above, but the 'Add service request +' button at the top right is circled in red to highlight it.

2. Application/contract information section:
 - a. Service request description – Enter words that describe the new service request.
 - b. Choose **Residential, Commercial, or Subdivisions**.
 - c. Identify the type(s) of service(s) needed.
 - d. Select **Continue**.

Service requests My builder profile Sign out

New service request Close

Builder: Energy company: Status:

Service request description:

Service requested date created: Service requested date submitted: Service requested date completed:

Application/Contact info

Application type

Service request description:

Residential Commercial Subdivisions

Type of service(s) requested: (check all that apply)

Electric

Natural gas

Temporary electric

3. Service request ID is generated. Fill out the following tabs with the appropriate information:
 - Application/Contact info
 - Job information
 - Service information
 - Verify info/Authorize
 - Comments/Contact us

Service requests My builder profile Sign out

Service request ID: 42 Save Close Delete

Builder: Energy company: Status:

Service request description: Services requested:

Service requested date created: Service requested date submitted: Service requested date completed:

Application/Contact info Job information Service information Verify info/Authorize Comments/Contact us

Application type

NOTE: You can save your progress by selecting Save and fill in the information later. You may also cancel and/or delete the service request using the buttons in the upper-right corner. You cannot delete the service request after it is submitted.

My builder profile screen



Builder information screen – Contains three unique tabs for updating the contractor information, contact list and sub-contractor list.



Builder information tab – Contains the contractor contact information, phone numbers, email addresses and addresses.

Updating builder information:

1. Update the **Legal business name** and/or **Website URL** in the fields, if necessary.
2. Select **Save**.

Builder information

Legal business name*

Website address

Energy companies*

Save + Close ✕

Updating builder phone numbers

1. Select **Add phone number +**.

Builder phone numbers					Add phone number +
Primary	Type	Description	Phone number	Actions	
<input checked="" type="checkbox"/>	Business	PRIMARY	(555) 555-5555		
<input type="checkbox"/>	Business	SECONDARY	(111) 111-1111		

2. Select the primary checkbox if you want to make the additional phone number the primary number. Fill in the **Type**, **Description** and **Phone number**. Select the plus button to save.

Builder phone numbers Add phone number +				
Primary	Type	Description	Phone number	Actions
<input type="checkbox"/>	Select a type			+ x
<input checked="" type="checkbox"/>	Business	PRIMARY	(555) 555-5555	+
<input type="checkbox"/>	Business	SECONDARY	(111) 111-1111	+

Updating builder email address(es)

1. Select **Add email address**.

Builder email address(es) Add email address +			
Primary	Description	Email	Actions
<input checked="" type="checkbox"/>	PRIMARY	Test@Test.com	+

2. Select the primary checkbox if you want to make the additional email address the primary email address. Fill in the **Description** and **Email**. Select **Add email address +** to save.

Builder email address(es) Add email address +			
Primary	Description	Email	Actions
<input type="checkbox"/>			+ x
<input checked="" type="checkbox"/>	PRIMARY	Test@Test.com	+

Updating builder address(es)

1. Select **Add address +**.

Builder address(es) Add address +			
Primary	Description	Address	Actions
> Yes	Branch Location	123 Test Way, Test City, WI 12345	+

2. Select the primary checkbox if you want to make the additional address the primary address. Fill in the **Description, Address 1, City, State** and **ZIP code**. Select **Create address +** to save. (Required fields are highlighted and contain an asterisk.)

NOTE: Before navigating to another screen within the application, select Save at the top of the screen to save all added/updated information.

Contact list tab – Contains all contacts for a particular company, including the contact name, title, primary phone, primary email address, project manager and primary contact.

Contact name	Title	Primary phone	Primary email address	Project manager	Primary contact
Primary Contact	Project Manager	(111) 111-1111	primary@email.com	Yes	Yes

Add contact

1. Select **Add contact +**.

- Fill in the contact's **First name**, **Last name**, **Title** and **Preferred contact method**. Select **Save**. **NOTE:** Add contact phone numbers and/or email addresses according to **Builder information** instructions above.

Service requests My builder profile Sign out

Builder information **Contact list** Sub-contractor list

Contact information Save + Close

Project manager Primary builder contact

First name* Last name* Suffix

Title* Preferred contact method

Contact phone numbers Add phone number +

Primary	Type	Description	Phone number	Actions
All	Choose	<input type="text"/>	<input type="text"/>	

No phone numbers found.

5 Total entries: 0

Contact phone numbers Add phone number +

Primary	Type	Description	Phone number	Actions
All	Choose	<input type="text"/>	<input type="text"/>	

No phone numbers found.

5 Total entries: 0

Contact email address(es) Add email address +

Primary	Description	Email	Actions
All	<input type="text"/>	<input type="text"/>	

No email addresses found.

5 Total entries: 0

Sub-contractor list tab – Contains a listing of all sub-contractors for a particular company. The list includes the sub-contractor, sub-contractor type, primary phone, primary email address and primary sub-contractor.

Service requests My builder profile Sign out

Builder information Contact list **Sub-contractor list**

Sub-contractors Add sub-contractor +

Sub-contractor	Sub-contractor type	Primary phone	Primary email address	Primary address	Primary sub-contractor
<input type="text"/>	Choose	<input type="text"/>	<input type="text"/>	<input type="text"/>	All

Adding a sub-contractor

- Select **Add sub-contractor +**.

Service requests My builder profile Sign out

Builder information Contact list **Sub-contractor list**

Sub-contractors Add sub-contractor +

Sub-contractor	Sub-contractor type	Primary phone	Primary email address	Primary address	Primary sub-contractor
<input type="text"/>	Choose	<input type="text"/>	<input type="text"/>	<input type="text"/>	All

- Fill in the **Business name** and **Sub-contractor type** (required fields). Select Save +.

Service requests My builder profile Sign out

Builder information Contact list Sub-contractor list

Sub-contractor information Save + Close

Business name* Website URL Primary sub-contractor Sub-contractor type* Select an Option

- To add the sub-contractor phone number, email address and/or address, follow the **Builder information** instructions.

Sub-contractor phone numbers Add phone number +

Primary	Type	Description	Phone number	Actions
No phone numbers found.				

Sub-contractor email address(es) Add email address +

Primary	Description	Email	Actions
No email addresses found.			

Sub-contractor address(es) Add address +

Primary	Description	Address	Actions
No addresses found.			

Tracking progress

- Go to the service request, select the work requests tab (which is visible after a work request number has been generated by the utility).

Application/Contact info Job information Service information Verify info/Authorize Work requests Comments/Contact us

- View the work request tasks for progress.

Description	Status	Completion date	Action
Site plan received	Complete	Mar 27, 2020	
Environmental review	Not required		
Permits received for utility construction	Complete	Jan 27, 2021	
Contract received	In progress		
Pre-payment received	In progress		
Service design approval	Not started		
Installation crews scheduled	Not started		
Contractor construction	Not started		
Utility construction	Not started		
Gas meter installed	Not started		

