

Minnesota Energy Resources Builder Portal Reference Guide



Contents

Signing in to the portal	1
Portal home screen	1
Service requests screen	2
Searching service requests.....	2
Adding a service request.....	2
My builder profile screen.....	4
Builder information screen	4
Builder information tab	4
Updating builder information:	4
Updating builder phone numbers.....	4
Updating builder email address(es)	5
Updating builder address(es)	5
Contact list tab	6
Add contact.....	6
Sub-contractor list tab	7
Adding a sub-contractor	7
Tracking progress.....	8

Signing in to the portal

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

MINNESOTA ENERGY RESOURCES

Home

Sign in

Email
ebuilder@minnesotaenergyresources.com

Password

[Forgot password?](#)

Sign in [Sign Up](#)

© Minnesota Energy Resources

WEC Energy Group

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**.



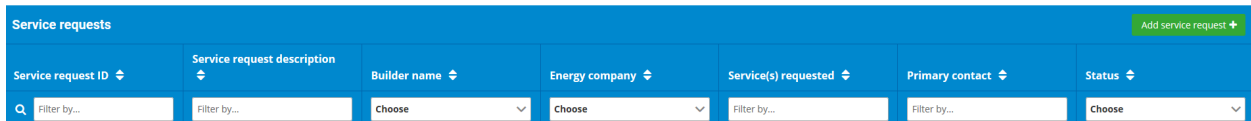
NOTE: First-time users, update your profile by selecting **My builder profile**.

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

Service requests screen

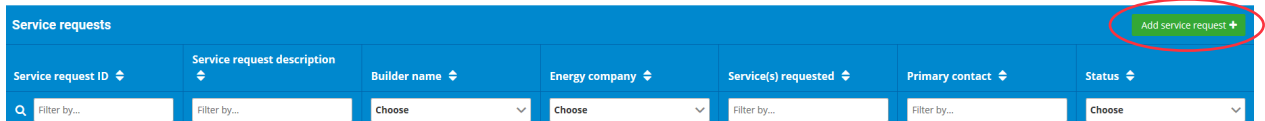
Searching service requests — You can enter specific information to search for a service request. Details may be entered in any of the below fields:

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



Adding a service request

1. Select **Add service request**.

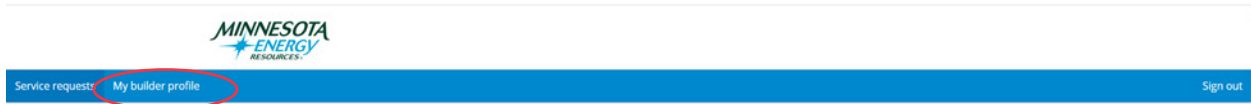


2. Application/contract information section:
 - a. Service request description – Enter words that describe the new service request.
 - b. Choose **Residential, Commercial, or Subdivisions**.
 - c. Identify the type(s) of service(s) needed.
 - d. Select **Continue**.

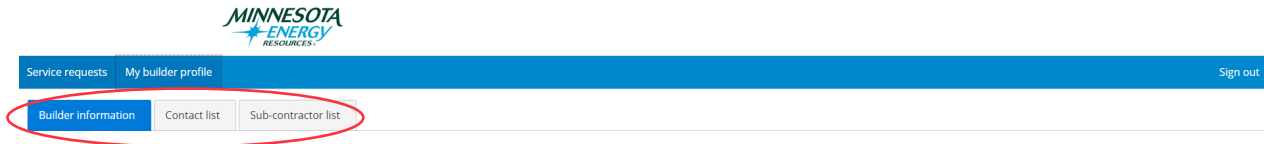
3. Service request ID is generated. Fill out the following tabs with the appropriate information:
 - Application/Contact info
 - Job information
 - Service information
 - Verify info/Authorize
 - Comments/Contact us

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



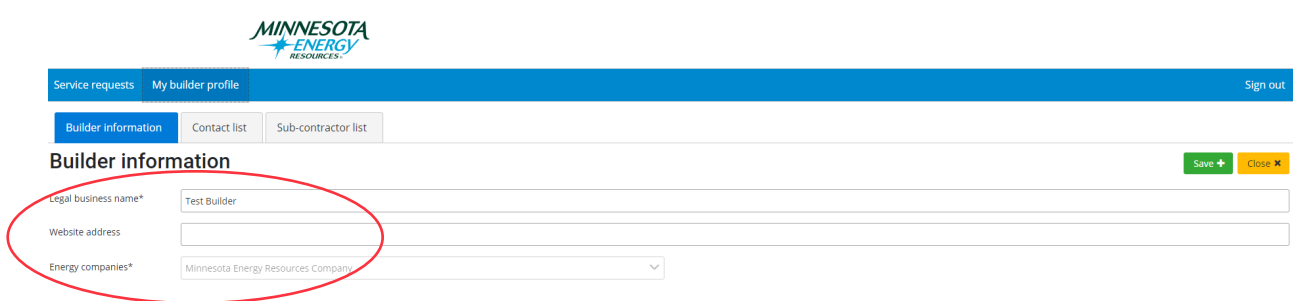
Builder information screen – Contains three unique tabs for updating the contractor information, contact list and sub-contractor list.



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

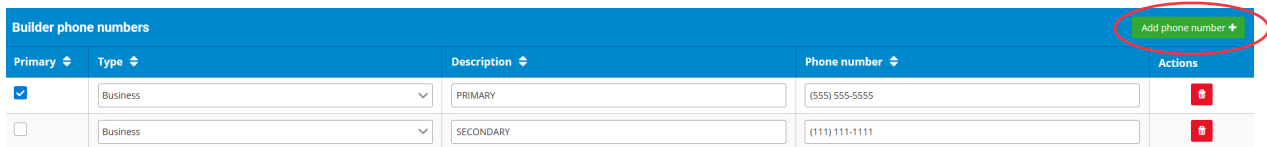
Updating builder information:

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



Updating builder phone numbers

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



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			+ ✖
<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"/>			+ ✖
<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 x

Project manager Primary builder contact

First name* [input] Last name* [input] Suffix [input]

Title* [input] Preferred contact method [Select]

Contact phone numbers Add phone number +

Primary	Type	Description	Phone number	Actions
All	Choose	[input]	[input]	

No phone numbers found.

Contact phone numbers Add phone number +

Primary	Type	Description	Phone number	Actions
All	Choose	[input]	[input]	

No phone numbers found.

Contact email address(es) Add email address +

Primary	Description	Email	Actions
All	[input]	[input]	

No email addresses found.

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]	Choose	[input]	[input]	[input]	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]	Choose	[input]	[input]	[input]	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*

- 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.				

5 Total entries: 0

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

Primary	Description	Email	Actions
No email addresses found.			

5 Total entries: 0

Sub-contractor address(es) Add address +

Primary	Description	Address	Actions
No addresses found.			

5 Total entries: 0

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.

Work request tasks			
Description	Status	Completion date	Action
<input type="text" value="Filter by..."/>	<input type="text" value="Choose"/>	<input type="text"/>	<input type="text" value="Filter by..."/>
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		

