

SAMPLE USER GUIDE

Smart Business Experience (BX) NSI Planner portal for State Admins is a digital platform for professional NSI contractors, building planners, and constructors to manage utility services across multiple projects. The platform is designed to offer convenience and control to an end-user allowing status and progress tracking in a project, work, and construction-related updates. The foundation of the platform is to strengthen communication between the American Water NSI and its customers, enhance user experience, and empower digital self-service for faster resolution.

The portal gives you a comprehensive and single-point portal where you can view the summary of work done; requests made, progress made, and manage documents. From the portal, you can view the customer activities, list of planners, list of NSI inquiries and applications, their current progress, and status, along with details such as documentation artifacts attached along with the current application phase details, list of assignments, and so on.

This user guide provides navigation instructions and field descriptions of the Smart BX NSI Planner portal for State Admins. This user guide is meant to be used by the State Administrators and Super Administrators.

Version 6.23.2024

TABLE OF CONTENTS

GETTING STARTED 4

 NSI PLANNER PORTAL FOR STATE ADMINS 4

 Login to the portal 4

 Viewing the Home Page 6

 Signing Out..... 6

ACCESSING ALL PROJECTS..... 7

 VIEWING PROJECTS 7

ACCESSING MY PROJECTS10

 MANAGING INQUIRIES.....10

 Inquiry Detail page13

 Requesting Documents.....15

 Promoting an Inquiry.....17

 Providing Estimate.....18

 Closing an Inquiry.....19

 MANAGING APPLICATIONS20

 Application Detail Page.....22

 Customer Details Section.....23

 Project Details Section24

 Managing Invoices.....25

 Managing Documents29

 Requesting General Documents.....31

GETTING STARTED

NSI PLANNER PORTAL FOR STATE ADMINS

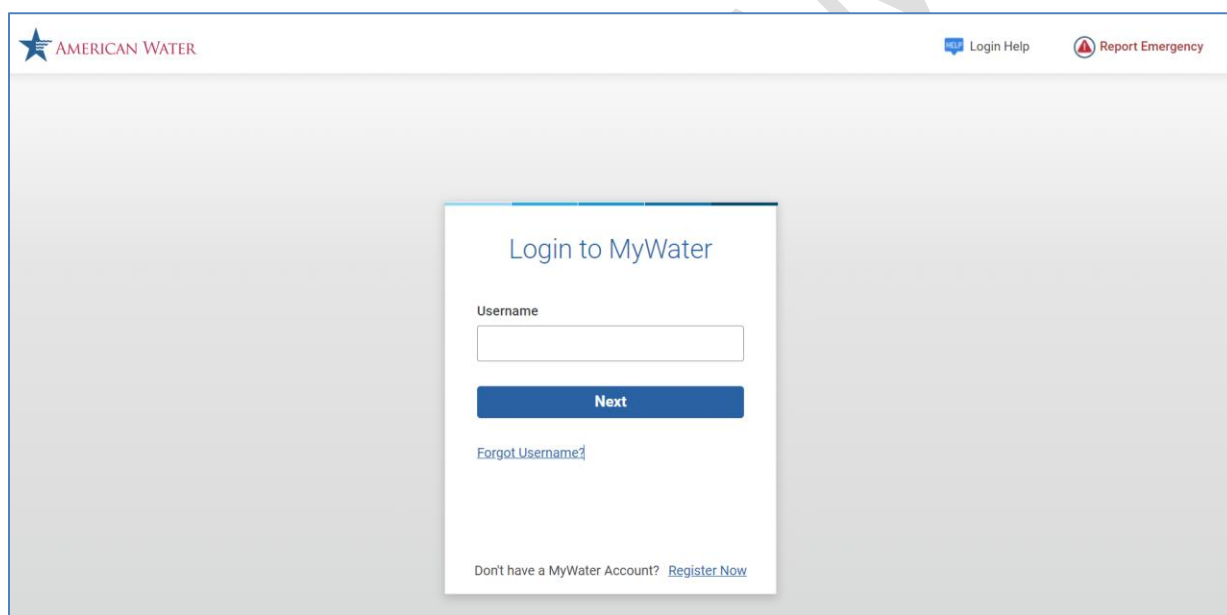
Before you use the American Water Smart BX NSI Planner portal for State Admins, you should be familiar with the layout and basic functionalities of the application.

LOGIN TO THE PORTAL

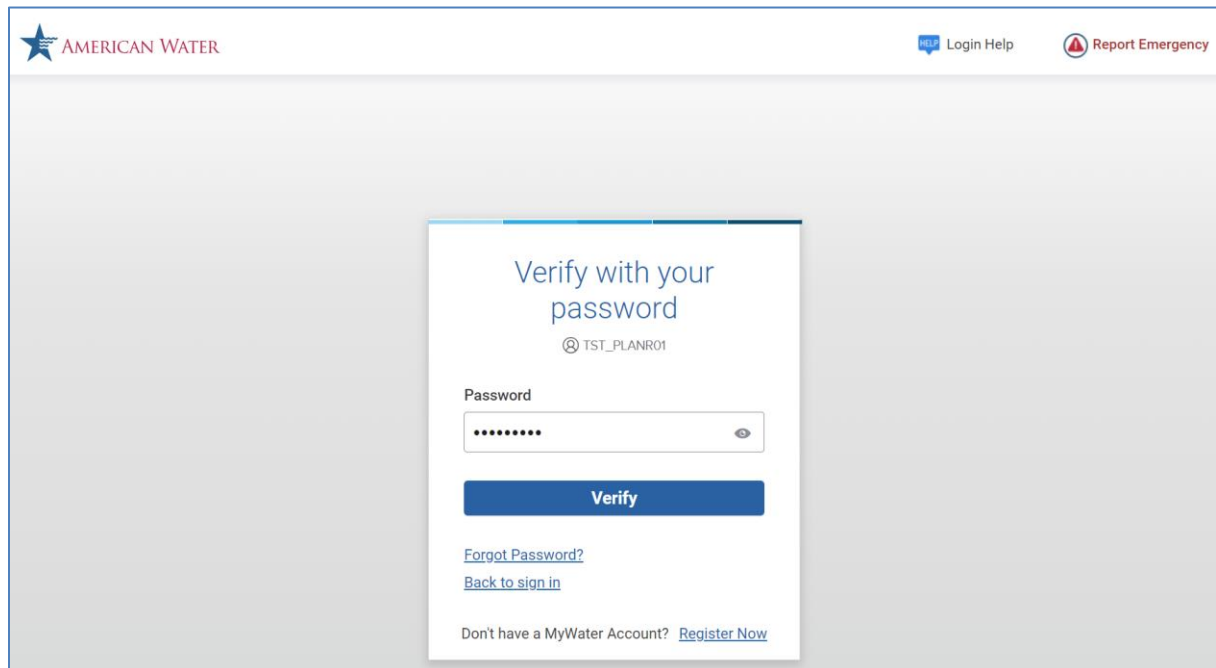
This section provides an overview of how a State Admin user can log in to the portal.

To log on to the portal, perform the following steps.

1. Navigate to the URL.
The system shows the **Login To MyWater** page.
2. Enter your username and choose **Next**.

A screenshot of the American Water NSI Planner portal login page. The page has a white header with the American Water logo on the left and 'Login Help' and 'Report Emergency' links on the right. The main content area is light gray. In the center, there is a white login box titled 'Login to MyWater'. Inside the box, there is a 'Username' label above a text input field. Below the input field is a blue 'Next' button. Under the button is a blue link 'Forgot Username?'. At the bottom of the box, it says 'Don't have a MyWater Account?' followed by a blue link 'Register Now'.

3. Enter the password and select **Verify** to verify the entered password.



The screenshot shows the American Water Planner Portal login interface. At the top left is the American Water logo. At the top right are links for 'Login Help' and 'Report Emergency'. The main content area features a central white box with the heading 'Verify with your password' and the username '@ TST_PLANR01'. Below this is a 'Password' field with a masked input (dots) and a toggle icon. A blue 'Verify' button is positioned below the password field. At the bottom of the box are links for 'Forgot Password?', 'Back to sign in', and 'Don't have a MyWater Account? Register Now'.

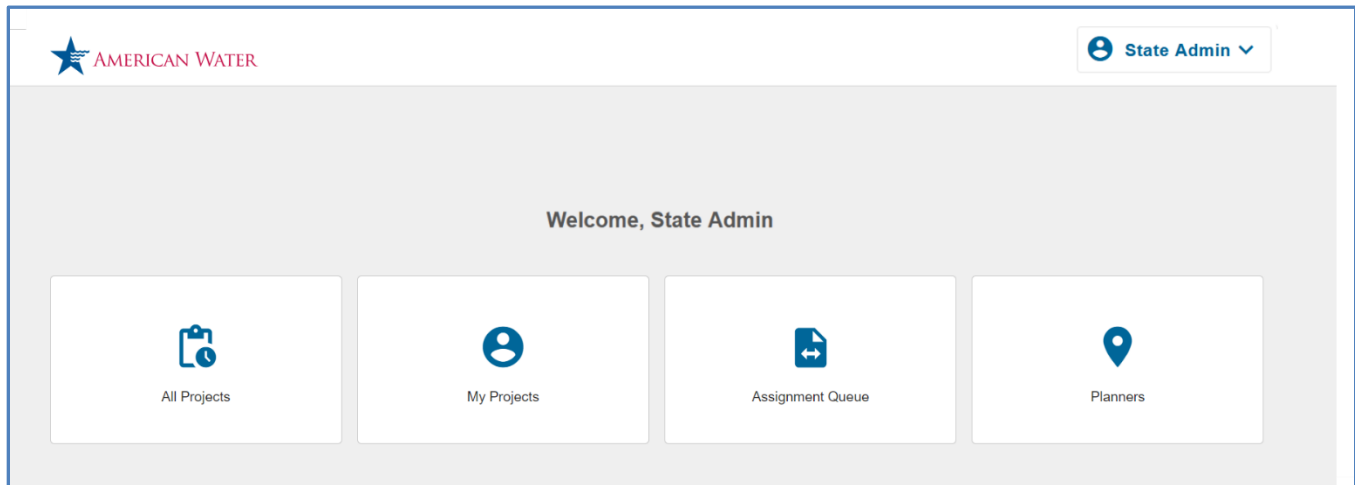
The system verifies your credentials and displays the Smart BX **Builder** page.

4. Select the **Builder** tile.

The system displays the **Home** Page of the NSI Planner portal for State Admins. See [Viewing Home Page](#).

VIEWING THE HOME PAGE

The figure below displays the **Home** page of the NSI Planner portal for State Admins.



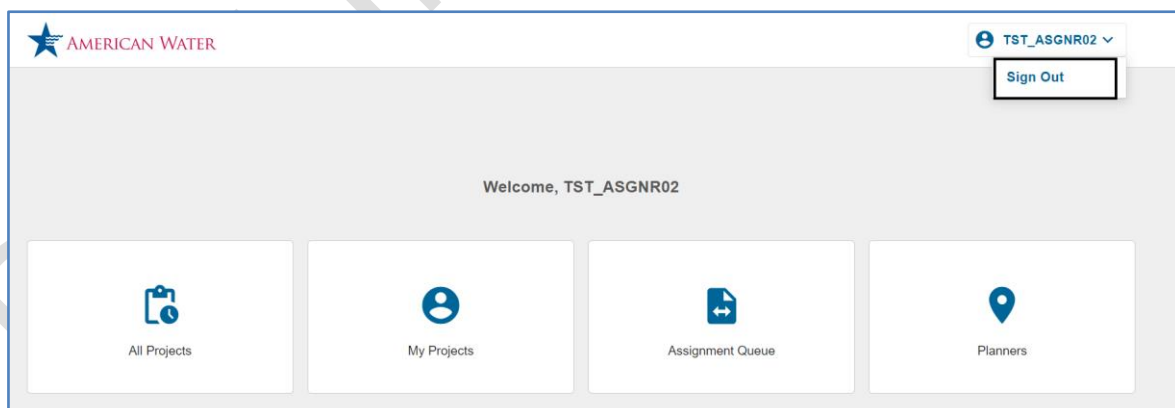
The **Home** page shows the following tiles:

- **All Projects** – Details of all the projects. See [Accessing All Projects](#).
- **My Projects** – Details of projects assigned to the user. See [Accessing My Projects](#).
- **Assignment Queue** – Details of unassigned projects. See [Managing Assignments](#).
- **Planners** – Details of all the planners. See [Accessing Project Planners](#).

SIGNING OUT

To sign out of the portal, perform the following steps.

1. Select the dropdown next to the username at the top-right corner of the **Home** page.
2. Select **Sign Out**.



ACCESSING ALL PROJECTS

You can view all the project applications and inquiries from the **All Projects** tile.

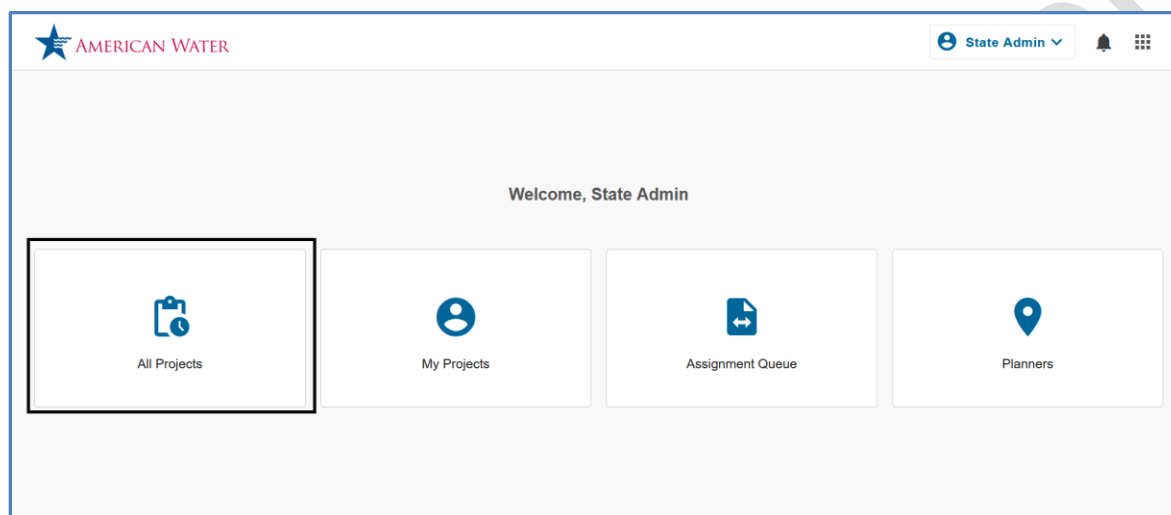


Help Topic –

<https://mapcall.awapps.com/Modules/mvc/HelpTopic/Show/##>

VIEWING PROJECTS


Select **All Projects** on the Home page to view all the project applications.



The system displays all the project applications and inquiries list on the **All Projects** page as shown here.

Project Name	Service Type	Customer	Planner	Submitted Date	last Updated	Open	Status
0618-demo-test-0619-completion 307 gordon dr a01248 clarks green us pa 18411 APP-PA-330648293	Domestic Water	CHANDU_113 J Owner	TST_NSIPL02@AMWATERNP.NET plannermesushil@yahoo.com	06/18/2024	06/18/2024	0 days	Active
NavTestProjectBundle 136 5th ave s coatesville us pa 19320 APP-PA-330648314	Sewer	WHITE KITE Owner	TST_NSIPL02@AMWATERNP.NET plannermesushil@yahoo.com	06/18/2024	06/18/2024	0 days	Active
NavTestProjectBundle 136 5th ave s coatesville us pa 19320 APP-PA-330648313	Domestic Water	WHITE KITE Owner	TST_NSIPL02@AMWATERNP.NET plannermesushil@yahoo.com	06/18/2024	06/18/2024	0 days	Active

The **All Projects** page displays the following elements:

- State filter – Select any of the following from the dropdown list (CA, HI, IA, IL, IN, KY, MD, MO, NJ, PA, TN, GA, VA, WV).
- Status filter – Select from options (Active/Closed). **All** option is selected, by default.
- Service type filter – Select any of the following from the dropdown list (Domestic Water, Sewer, Irrigation, and Fire Service). **All** option is selected, by default.
- Form type filter – Select from options (Application and Inquiry). **All** option is selected, by default.
- Search – Enter any of the following search criteria in the search text box and select the Search icon  (Customer Name, Inquiry/Application Number, or Service Address). **All** option is selected, by default.
- Export – Choose export to download the page details in an Excel sheet. The export option will export the data based on the page size selection at the bottom. The default selection is 10 rows per page; however, you can change it from the **Rows per page** dropdown list (at the bottom) to increase the number of rows per page and view or download the details.


You can enable the **Parent View** toggle option to view the name of the parent project. See [Viewing Bulk Applications](#).

The **All Projects** page displays the following column details based on the selected filters and entered search criteria:



- Project Nam
- Parent Name (This will only show for bulk applications)
- Service Type
- Customer
- Planner
- Submitted Date
- Last Updated
- Open
- Status

PLANNER PORTAL USER GUIDE FOR STATE ADMINS

Also, you can select any row to view the detailed view of a project application or inquiry as a planner as shown here.



State Admin



My Projects

HomeAll ProjectsMy ProjectsAssignment QueuePlanners

OWNER ACCOUNT
136 s 5th ave coatesville pa ,19320

Status: Application

Phase: Documentation Submitted

Hold: ☐ Off ☒ On

Back to Project View

APPLICATION

CONSTRUCTION

CLOSE OUT

CUSTOMER DETAILS

Application ID	APP-PA-328541258
Customer Name	OWNER ACCOUNT
Email Address	uatowner01@yopmail.com
Contact Number	1111111111
Project Information	136 s 5th ave coatesville pa ,19320
Date Created	04/11/2024

TO DO LIST

Titles	Requested On
Cost Estimation	04/11/2024
Sewer - Fixture Form Worksheet Review	04/11/2024
Premise/TMD Review	04/11/2024
Serviceability Approval	04/11/2024

INVOICES

[View all Invoices](#)


Title	Amount
-------	--------

PROJECT DETAILS

Project/Development Name	GIS
Premise Type	OWNRPREM

APPLICATION DOCUMENTS

[View all documents](#)

Document Name	Uploaded
 Water Data Worksheet	04/11/2024

ACCESSING MY PROJECTS

All the projects that you have assigned to yourself can be accessed from the **My Projects** tile. You can perform the following actions from **My Projects** as explained in the subsequent sections:

- [Managing Inquiries](#)
- [Managing Applications](#)
- [Unassigning Inquiry/Application](#)

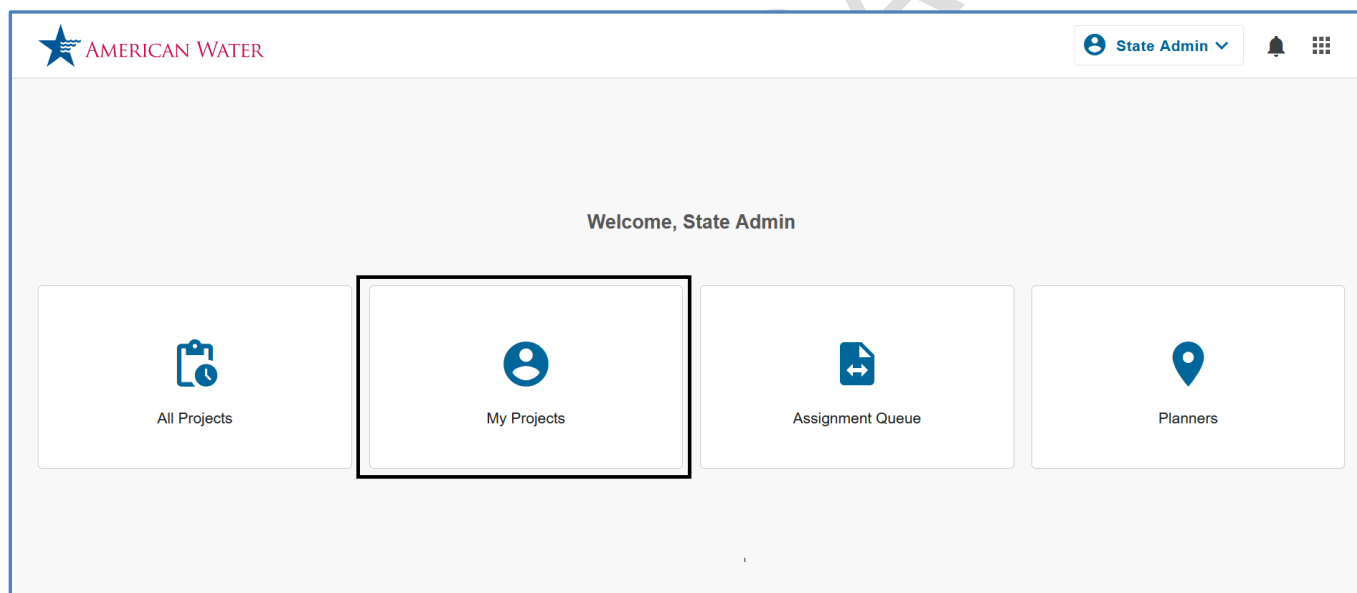


Help Topic –

<https://mapcall.awapps.com/Modules/mvc/HelpTopic/Show/##>

MANAGING INQUIRIES

Select **My Projects** on the Home page.



PLANNER PORTAL USER GUIDE FOR STATE ADMINS

Select the **Inquiry** tab under **My Projects** to view the current list of NSI inquiries that are assigned to the State Admin user as shown here.

The screenshot shows the 'My Projects' section of the Planner Portal. The 'Inquiry' tab is selected, showing 9 inquiries. The 'Application' tab shows 11 applications. The filters are set to 'All' for Service Type, Status, and Phase. The last modified date is 'Last Modified'. The search bar is empty. The list of inquiries shows three entries for 'SUMANTH REDDY' at '16 gilbert ln mc donald PA, 15057'. The project names are 'newinq1112 - Domestic Water', 'inq991 - Domestic Water', and 'lating99 - Domestic Water'. The phases are 'Promoted', 'Closed', and 'Promoted'. The status is 'Closed' for all. The inquiry IDs are 'INQ-PA-h0ip5r-WN', 'INQ-PA-nhmoo8-WN', and 'lating99 - Domestic Water'. The days open are '0 Day' for all. The date created is '03/11/2024' for all. The last updated is '03/11/2024' for all.

You can view a specific Inquiry by selecting an option from the following filters. All is selected, by default for all the filters.

- Service Type – Select from the following dropdown list (Domestic Water, Sewer, Irrigation, or Fire Service)
- Status – Select from the following dropdown list (Active, Closed).
 - Under **Active** status, there are three phases: Inquiry Filed, Pre-application Review, and Quoted.
 - Under **Closed** status, either the Inquiry is closed by the user, or promoted to an application or the inquiry expires after 45 days of the quotation given by the planner. If the Inquiry is closed no further action can be taken on it.
- Phase – Select from the following dropdown list (Pre-Application Review, Closed, Not Serviceable, Quoted, Promoted, and Expired)

Phase	Description
New	The Inquiry has been submitted by the customer.
Pre-application Review	The inquiry is under review and the Planner is building up an unofficial quote (Inquiry Quote).
Quoted	A quotation is given by the planner based on customer input.
Promoted	The inquiry has been pushed into an application state
Closed	The user or Planner has closed out the Inquiry. No action can be taken once the inquiry is closed.

Phase	Description
Not Serviceable	The inquiry comes under the red path, and an email notification is triggered to the state admin user.
Expired	When estimation & quotations are given by a planner, and it has not been worked upon by a customer for more than 45 days.

- **Last Modified** – Select the date when this inquiry was last modified.

Search option: You can search the details by Project Name, Inquiry ID, Address, and Applicant Name.

Each Inquiry displays the following details under the **Inquiry** tab:

Name of the customer or applicant's name, service address, name of the project, Inquiry phase, inquiry status, inquiry ID, number of days this inquiry is open, date this inquiry was created, and date this inquiry was last updated.

See [Viewing Inquiry Detail Page](#).

INQUIRY DETAIL PAGE

Select an inquiry on the **Inquiry** page to view and verify the details.

AMERICAN WATER State Admin

My Projects Home All Projects **My Projects** Assignment Queue Planners

Inquiry (9) Application (11)

SERVICE TYPE STATUS PHASE LAST MODIFIED

All Last Modified Search by Project Name, Inquiry ID, Address and Applicant Name

SUMANTH REDDY
16 gilbert In mc donald PA, 15057
Project Name: newinq1112 - Domestic Water
Phase: Promoted Status: Closed Inquiry ID: INQ-PA-h0ip5r-WN Days open: 0 Day Date Created: 03/11/2024 Last Updated: 03/11/2024

SUMANTH REDDY
16 gilbert In mc donald PA, 15057
Project Name: inq991 - Domestic Water
Phase: Promoted Status: Closed Inquiry ID: INQ-PA-nhmoo8-WN Days open: 0 Day Date Created: 03/11/2024 Last Updated: 03/11/2024

The system displays the following details:

- **Your Inquiry** – Displays Inquiry ID, Project Name, Status, Phase, and Date Created.
- **Inquiry Details** – Displays Service Location, Service Type, Project Type, Job Type, and Property Type.

AMERICAN WATER State Admin

SHIZUKA MINAMOTO
264 Bushkill, PA 18324
Inquiry ID: INQ-PA-eeujw9-WN

Status: Active Phase: Pre-Application Review

[← Back to Project View](#)

INQUIRY SUBMITTED **CLOSE OUT**

YOUR INQUIRY

Inquiry ID
INQ-PA-eeujw9-WN

Project Name
jbh - Domestic Water

Status
Active

Phase
Pre-Application Review

Date Created
01/30/2024

INQUIRY DETAILS

SERVICE LOCATION
264 canterbury Bushkill Allegheny PA 18324

SERVICE TYPE
Domestic Water

PROJECT TYPE

JOB TYPE
New Installation

PROPERTY TYPE
Commercial



Notes: Inquiry Details show **Project Type** only if the user is a Developer/Contractor that submitted the Inquiry and was asked "Project Type" queries. Else, Owners are not asked this question.

- **Project Details** -Displays details based on the project. The fields are dynamic and depend on the selected state and service type for a project.

PROJECT DETAILS	
Building Ownership	Leased
Do you have well?	Yes
Is it in-service or cut and capped?	In-service
Date Service is needed?	Wednesday, January 31, 2024
Is your road public or private?	Public
Sewage Authority	NA
Type of Heat	Hot Water
Backflow Prevention Req. Check	Yes
BFP High Risk Indicator	Yes

You can perform the following actions from an inquiry only if it is in Active state:

- [Make a Request](#)
- [Promote](#)
- [Provide Estimate](#)
- [Close an Inquiry](#)

MAKE REQUEST	PROMOTE	CLOSE
No estimate has been provided for this inquiry.		
PROVIDE ESTIMATE		

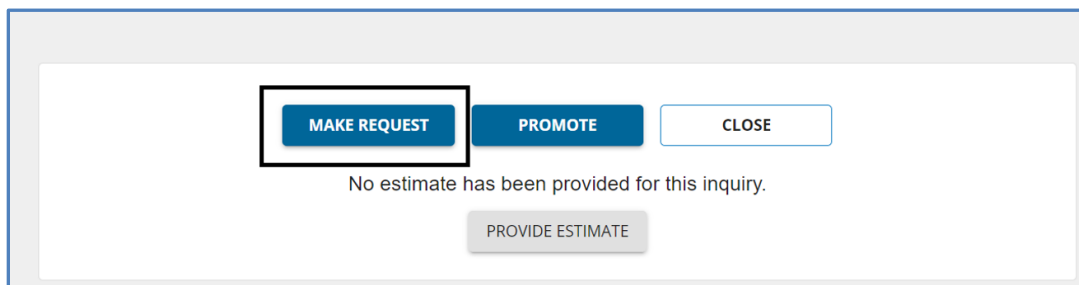
The subsequent sections describe the above action items in detail.

REQUESTING DOCUMENTS

After reviewing the inquiry, you can request additional documents or any other information to provide a proper estimate for this inquiry. You can send the applicant an email directly using the **Make Request** option.

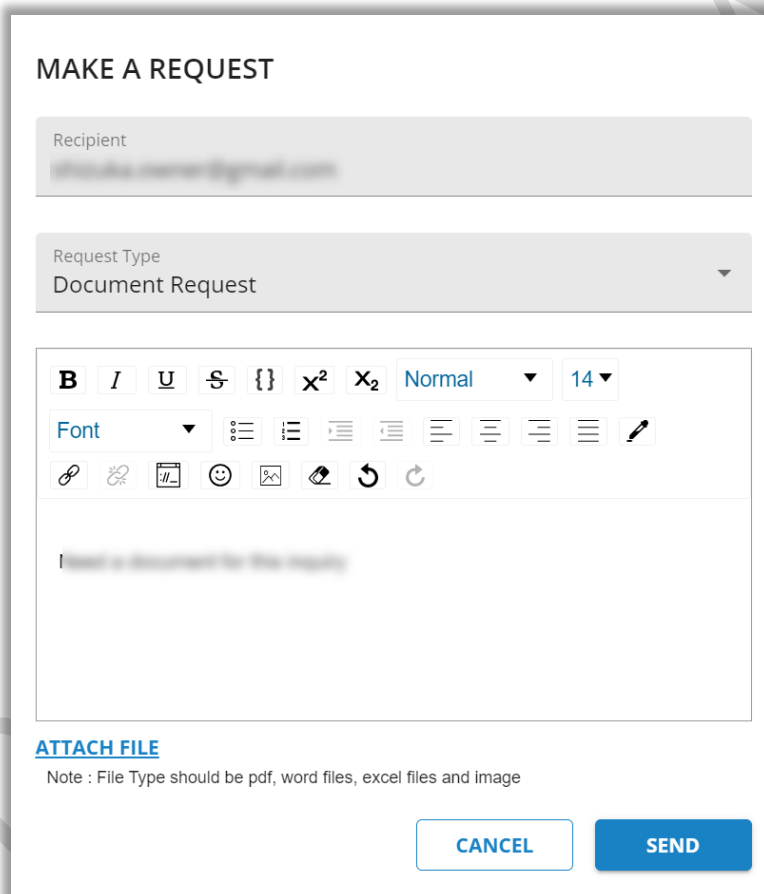
To request additional information, perform the following steps.

1. Select the **Make Request** button on the **Inquiry Detail** page.



The screenshot shows a section of the Inquiry Detail page. At the top, there are three buttons: 'MAKE REQUEST' (highlighted with a red box), 'PROMOTE', and 'CLOSE'. Below these buttons, a message states: 'No estimate has been provided for this inquiry.' At the bottom of this section is a button labeled 'PROVIDE ESTIMATE'.

The system displays the **Make a Request** popup window. The recipient field is non-editable.



The 'MAKE A REQUEST' popup window contains the following elements:

- Recipient:** A non-editable text field showing an email address.
- Request Type:** A dropdown menu currently set to 'Document Request'.
- Rich Text Editor:** Includes a toolbar with options for bold (B), italic (I), underline (U), strikethrough (ABC), link (x²), and unlink (x₂), as well as text color (Normal) and font size (14). Below the toolbar is a large text area for composing the request message.
- ATTACH FILE:** A link to attach files.
- Note:** A message stating 'Note : File Type should be pdf, word files, excel files and image'.
- Buttons:** 'CANCEL' and 'SEND' buttons at the bottom right.

2. Select the **Request Type** from the dropdown list (Document Request or General Information).
3. Type the request detail in the message box.

4. You can also attach a file while making a request using **Attach File**. The file type should be either Excel, Word, PDF, or Image. You can upload multiple files, but the total size of all files should not exceed 20 MB.
5. Select **Send**.
The **Send** button is enabled only when you have selected the Request type and entered the request details in the message box.



Notes: From the **Make a Request** option of an inquiry a Planner user can request any general information or a document. Once a request is made, the customer is notified. For an Application, requesting document functionality is different. See [Requesting a Document in Application](#).

Once the estimation is provided by the planner, the system shows the **Previous Estimate Provided** <date> and the **Expiration** <date> of the same.

Select the **View Prev. Estimate** button to download the previous estimated file.

You (as a State Admin user) can also provide new estimates using the **Provided New Estimate** and overwrite the previous file.

An email notification is sent to the customer once any estimation is provided.

MAKE REQUEST

PROMOTE

CLOSE

PREVIOUS ESTIMATE PROVIDED: 04/16/2024
EXPIRATION DATE: 05/16/2024
Estimation provided

VIEW PREV. ESTIMATE

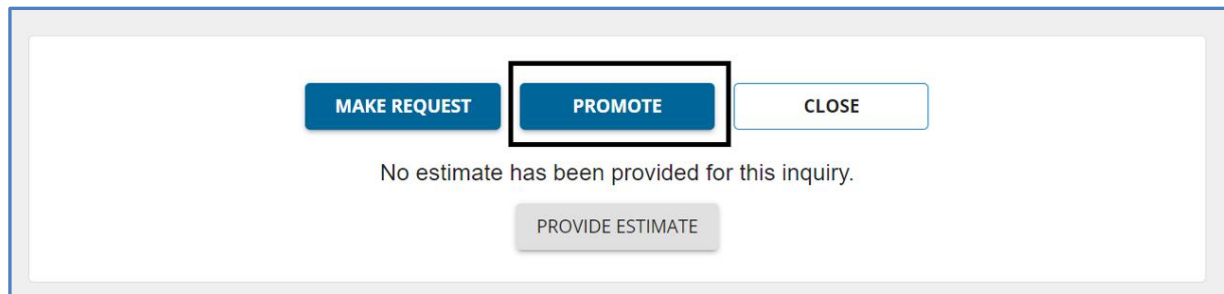
PROVIDE NEW ESTIMATE

PROMOTING AN INQUIRY

Once the inquiry is reviewed, you can promote this Inquiry and convert this inquiry to an application.

To promote an inquiry, perform the following steps.

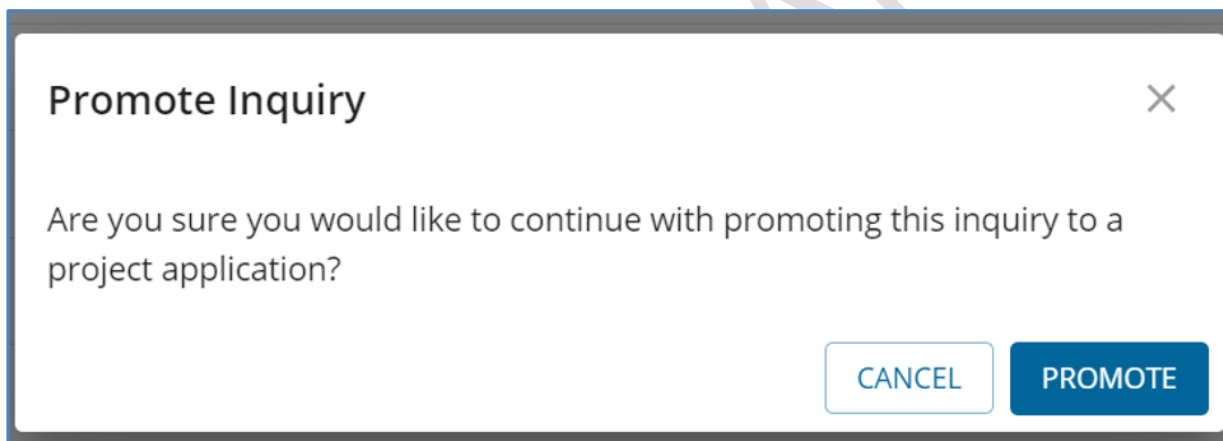
1. Select **Promote** on the **Inquiry Detail** page.



A screenshot of the Inquiry Detail page. At the top, there are three buttons: "MAKE REQUEST", "PROMOTE", and "CLOSE". The "PROMOTE" button is highlighted with a red rectangular border. Below these buttons, a message states: "No estimate has been provided for this inquiry." At the bottom, there is a grey button labeled "PROVIDE ESTIMATE".

The system prompts you to confirm.

2. Select **Promote** to confirm this.



A screenshot of a confirmation dialog box titled "Promote Inquiry". The dialog contains the text: "Are you sure you would like to continue with promoting this inquiry to a project application?". At the bottom right, there are two buttons: "CANCEL" and "PROMOTE". A close button (X) is located in the top right corner of the dialog.

The system displays a confirmation message as "Inquiry promoted successfully. The Application number is <Application number>".

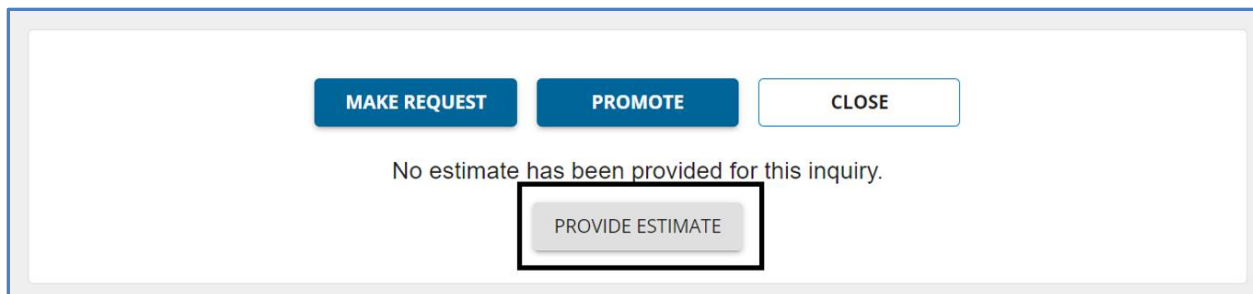
The status of an Inquiry automatically changes to **Closed** once this is promoted. The customer is notified when the Inquiry is promoted.

PROVIDING ESTIMATE

After reviewing the Inquiry in detail, you can provide an estimate for the cost of services.

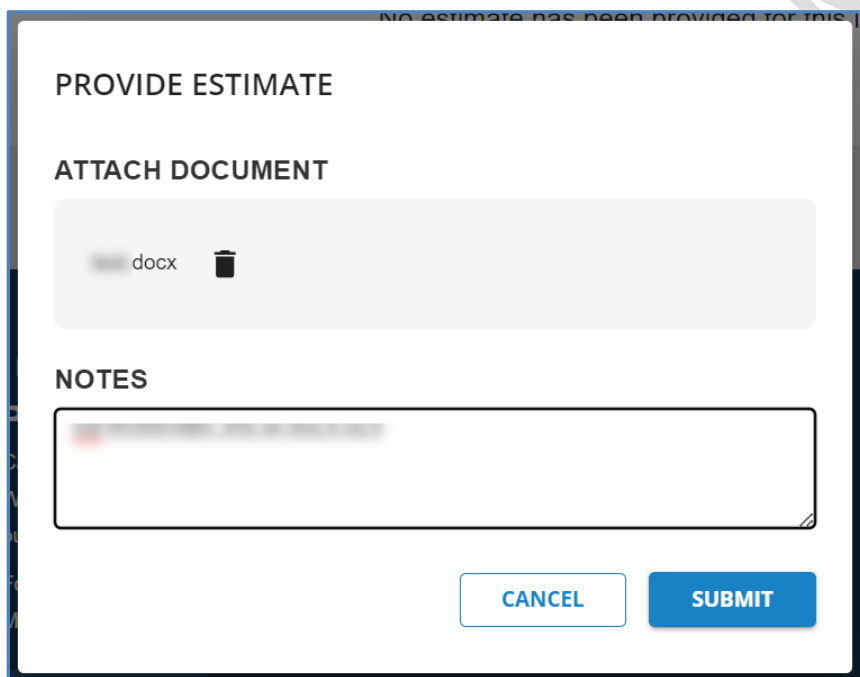
To provide an estimate, perform the following steps.

1. Select **Provide Estimate** on the **Inquiry Detail** page.



A screenshot of the Inquiry Detail page. At the top, there are three buttons: 'MAKE REQUEST' (blue), 'PROMOTE' (blue), and 'CLOSE' (white with blue border). Below these buttons, the text 'No estimate has been provided for this inquiry.' is displayed. A button labeled 'PROVIDE ESTIMATE' is highlighted with a red rectangular box.

The system displays the **Provide Estimate** popup window.



A screenshot of the 'Provide Estimate' popup window. The window has a title bar 'PROVIDE ESTIMATE'. Below the title bar, there is a section 'ATTACH DOCUMENT' with a file upload area showing a 'docx' file icon and a trash icon. Below this is a 'NOTES' section with a text area. At the bottom right, there are two buttons: 'CANCEL' (white with blue border) and 'SUBMIT' (blue).

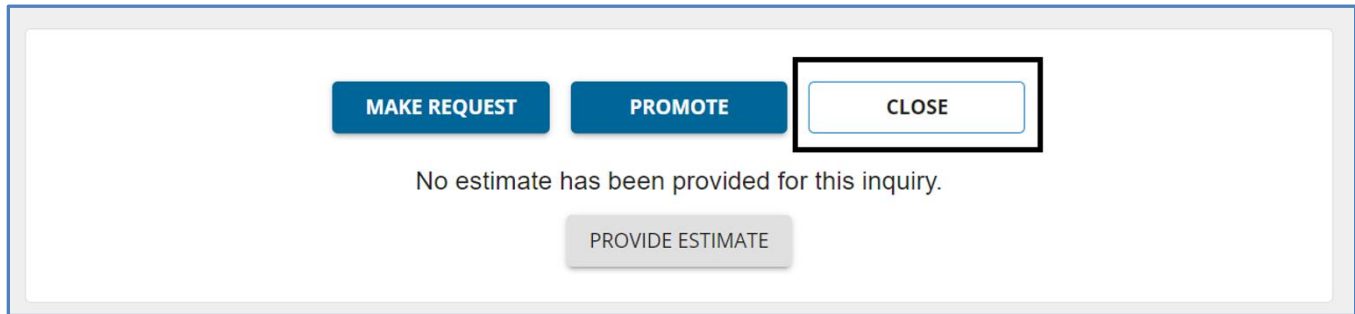
2. From the **Attach Document**, you can attach the required estimated file. You can either directly drop the attachment file or choose the **Select files from your computer** link to attach the file. The file type should be PDF, word, Excel, or image. You can attach only one document.
3. Enter your comments/messages in the **Notes**.
4. Select **Submit**.



Notes: The **Submit** button is enabled only when you have attached the estimated file and added your message in the **Notes**.

CLOSING AN INQUIRY

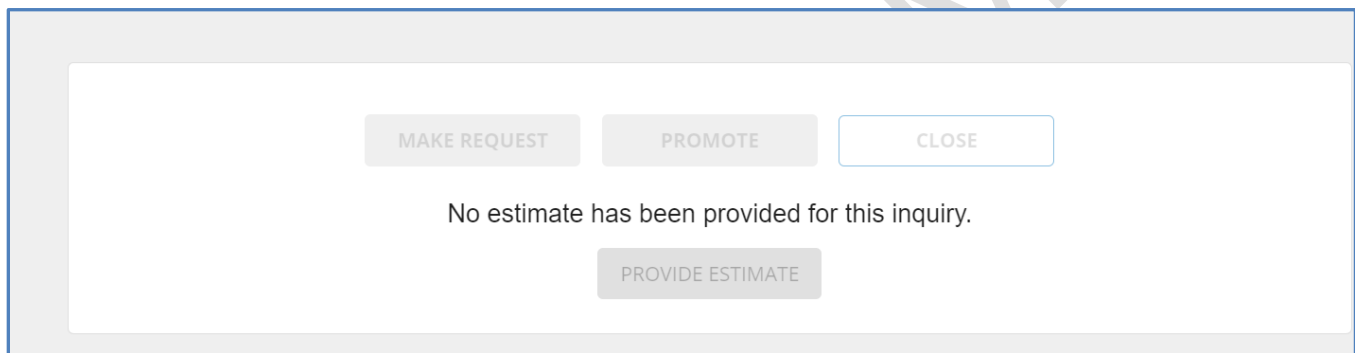
Select the **Close** button on the Inquiry Detail page to close the inquiry without further action.



A screenshot of the Inquiry Detail page interface. At the top, there are three buttons: 'MAKE REQUEST' (dark blue), 'PROMOTE' (dark blue), and 'CLOSE' (white with a black border). Below these buttons, the text 'No estimate has been provided for this inquiry.' is displayed. At the bottom, there is a 'PROVIDE ESTIMATE' button (light gray).

The system displays a confirmation message that the inquiry has been closed successfully.

Once the inquiry has been closed, all the action items are disabled.



A screenshot of the Inquiry Detail page interface, identical to the previous one, but with all buttons ('MAKE REQUEST', 'PROMOTE', 'CLOSE', and 'PROVIDE ESTIMATE') rendered in a light gray, disabled state.

MANAGING APPLICATIONS

Select the **Application** tab under **My Projects**, to view the list of all current NSI applications that are assigned to the State Admin user.

The system displays the **Applications** list page as shown here.

The screenshot shows the 'My Projects' page in the American Water Planner Portal. The 'Application' tab is selected, showing a list of 81 applications. The filters are set to 'Inquiry (8)' and 'Application (81)'. The list displays three applications, each with details like Service Type, Status, Phase, Last Modified, and a search bar.

SERVICE TYPE	STATUS	PHASE	LAST MODIFIED	SEARCH
All	ALL		dd/mm/yyyy	Search by Application Name/Number, Service Address, and Customer Name

AW_USER_DEMO	3403 orchard view reading us pa ,19606	Project Name:test - Fire Service	Phase: Application Review	Status: Application	Application Number: APP-PA-330648082	Date Created:06/18/2024	Last Updated:06/18/2024	Contract Account #: N/A	Days Open #: 1
AW_USER_DEMO	2007 west chester rd coatesville us pa ,19320	Project Name:test - Fire Service	Phase: Application Review	Status: Application	Application Number: APP-PA-330648081	Date Created:06/18/2024	Last Updated:06/18/2024	Contract Account #: N/A	Days Open #: 1
AW_USER_DEMO	113 s harner blvd coatesville us pa ,19320	Project Name:test - Fire Service	Phase: Documentation Submitted	Status: Application	Application Number: APP-PA-330648080	Date Created:06/18/2024	Last Updated:06/18/2024	Contract Account #: N/A	Days Open #: 1


Select the required option in the following filters to view any specific application:

- **Project Type** – Select from the dropdown list.
- **Status** – Select from the following dropdown list (Application, Construction, and Close Out).

Status	Description
Application	When an application is assigned to the internal users (State Admins).
Construction	Under development (Application has been submitted and is being worked upon.)
Closed out	The application has been completed and closed out. Demolish is completed by the planner.

- **Phase** – Select from the following dropdown list (Application Filed, Application Review, Application Approved, Application Denied, Application on Hold, Application Expired, Documentation Requested, Document Submitted, Document Rejected, Costs Posted, Payment Received, Payment Posted, Payment Rejected, Main Line Construction Scheduled, Main Line Construction, Completed, Service Line Construction Planned, Service Line Construction Scheduled, Service Line Construction

Completed Meter Installation Requires Customer Scheduling, Customer Communication Sent, Meter Order Scheduled, Meter Order Completed, Billing Activated, and Application Closed).

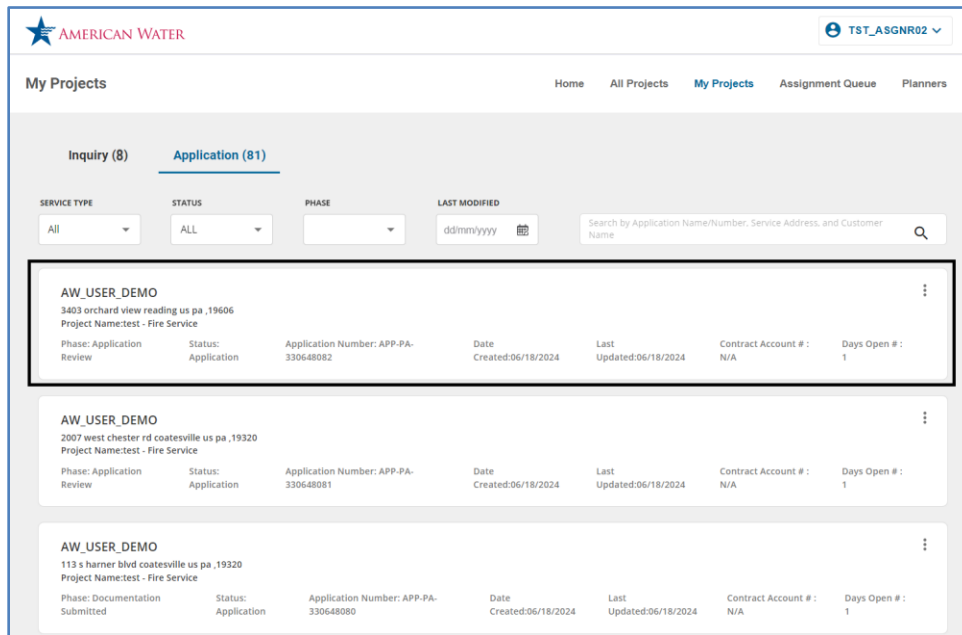
- **Last Modified** – Select the required date to view the applications by the last modified date.
- **Search** - Search for a specific application by entering search criteria related to the application name/number, service address, or customer name and choose the icon .
- Each application displays the following details:
 - Applicant Name
 - Applicant Address
 - Phase
 - Status
 - Application Number
 - Date Created
 - Last Updated
 - Contract Account Number
 - Days Open

See [Application Detail Page](#).

PLANNER PORTAL USER GUIDE FOR STATE ADMINS

APPLICATION DETAIL PAGE

Select any application on the **Application List** page to view its details.



AMERICAN WATER TST_ASGNR02

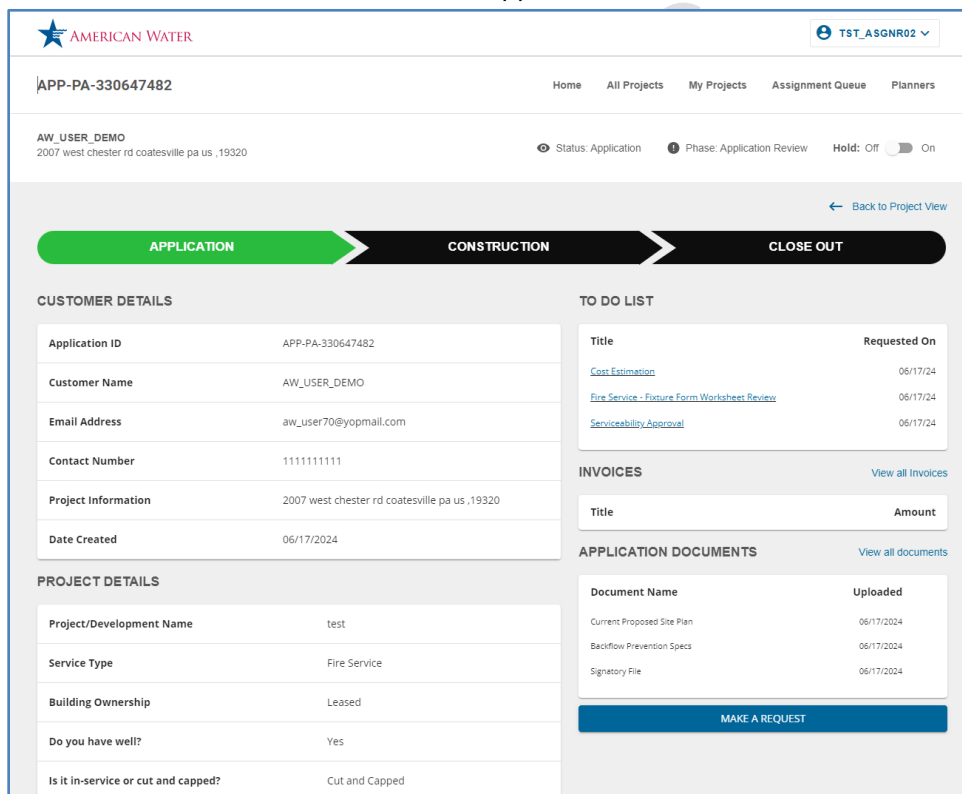
My Projects Home All Projects My Projects Assignment Queue Planners

Inquiry (8) **Application (81)**

SERVICE TYPE: All STATUS: ALL PHASE: LAST MODIFIED: dd/mm/yyyy Search by Application Name/Number, Service Address, and Customer Name

Application Name	Status	Application Number	Date Created	Last Updated	Contract Account #	Days Open
AW_USER_DEMO 3403 orchard view reading us pa ,19606 Project Name:test - Fire Service	Application	APP-PA-33064802	Created:06/18/2024	Updated:06/18/2024	N/A	1
AW_USER_DEMO 2007 west chester rd coatesville us pa ,19320 Project Name:test - Fire Service	Application	APP-PA-33064801	Created:06/18/2024	Updated:06/18/2024	N/A	1
AW_USER_DEMO 113 s harnet blvd coatesville us pa ,19320 Project Name:test - Fire Service	Documentation Submitted	APP-PA-330648080	Created:06/18/2024	Updated:06/18/2024	N/A	1

The Application Details page displays the following details at the top section of the page: Applicant's name and address, Status, and Phase of the application.



AMERICAN WATER TST_ASGNR02

APP-PA-330647482 Home All Projects My Projects Assignment Queue Planners

AW_USER_DEMO
2007 west chester rd coatesville us pa ,19320

Status: Application Phase: Application Review Hold: Off On

Back to Project View

APPLICATION CONSTRUCTION CLOSE OUT

CUSTOMER DETAILS	
Application ID	APP-PA-330647482
Customer Name	AW_USER_DEMO
Email Address	aw_user70@yopmail.com
Contact Number	1111111111
Project Information	2007 west chester rd coatesville us pa ,19320
Date Created	06/17/2024

TO DO LIST	
Title	Requested On
Cost Estimation	06/17/24
Fire Service - Fixture Form Worksheet Review	06/17/24
Serviceability Approval	06/17/24

INVOICES View all Invoices

Title	Amount
-------	--------

APPLICATION DOCUMENTS View all documents

Document Name	Uploaded
Current Proposed Site Plan	06/17/2024
Backflow Prevention Specs	06/17/2024
Signatory File	06/17/2024

MAKE A REQUEST

PROJECT DETAILS	
Project/Development Name	test
Service Type	Fire Service
Building Ownership	Leased
Do you have well?	Yes
Is it in-service or cut and capped?	Cut and Capped

The Application Details page also displays the following sections:

[Customer Details](#), [Project Details](#), [To Do List](#), [Invoices](#), [Documents](#), and other dynamic sections as per the selection of the application.

From the Application Details page, you can make further requests for any missing documents. See [Managing Documents](#).

The **Hold** toggle button (at the top-right corner) allows you to put a specific project on hold. No action can be taken on it until a project is on hold. A notification is sent to the planner every 7 days if an application or inquiry is on hold.

Customer Details Section

The **Customer Details** section on the Application detail page displays the following details:

- Application ID
- Project Owner
- APN Number
- Project Address
- Email
- Phone Number

CUSTOMER DETAILS

Application ID	APP-PA-328553386
Customer Name	SUMANTH REDDY
Email Address	abpuat446@yopmail.com
Contact Number	2159874925
Project Information	136 s 5th ave coatesville pa adams ,
Date Created	04/16/2024

Project Details Section

The **Project Details** section fields on the Application detail page are dynamic and depend on the selected state and service type for a project.

PROJECT DETAILS	
Project/Development Name	NSLzone - Floor-1
Premise Type	REC
Service Type	Irrigation
Building Ownership	Leased
Do you have well?	Yes
Is it in-service or cut and capped?	In-service
Date Service is needed?	Thursday, April 25, 2024
Meter Size	NA
Backflow Prevention Req. Check	NA
BFP High Risk Indicator	No

PLANNER PORTAL USER GUIDE FOR STATE ADMINS

Managing Invoices

The **Invoices** section on the Application Detail page allows you to view the list of invoices attached for the project application that is created by the internal user with the amount as shown here.

MAHIMA TEKI
531 maytide apt 11 pittsburgh pa ,15227

Status: ApplicationPhase: Payment PostedHold: Off ☐ On

← Back to Project View

APPLICATIONCONSTRUCTIONCLOSE OUT

CUSTOMER DETAILS

Application ID	APP-PA-328538671
Customer Name	MAHIMA TEKI
Email Address	mahima.teki@amwater.com
Contact Number	3024387255
Project Information	531 maytide apt 11 pittsburgh pa ,15227
Date Created	03/26/2024

TO DO LIST

Titles	Requested On
Cost Estimation	03/26/2024
Domestic Water - Fixture Form Worksheet Review	03/26/2024
Serviceability Approval	03/26/2024

INVOICES [View all Invoices](#)

Title	Amount
Invoice Details	125

Select the **View all Invoices** link to view all the invoice details. The system displays the Invoice List page as shown here.

AMERICAN WATER

TST_ASQNR02

Invoices | APP-PA-330647477

← Back to Project View

Invoice Title	Invoice	Project Name	Application Number	Amount	Status
Invoice Details	4000284112	Residential	APP-PA-330647477	\$12.33	Pending Payment

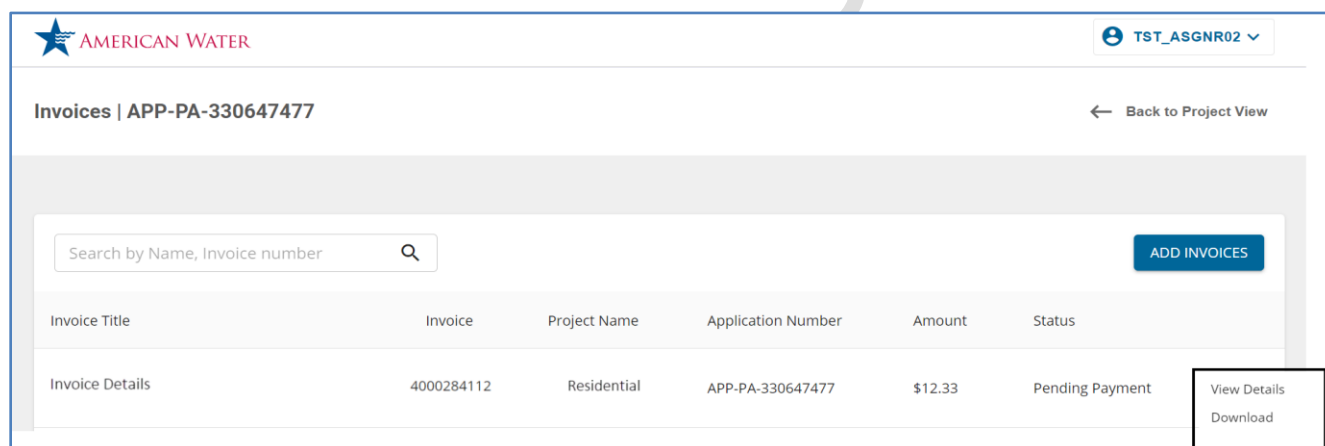
PLANNER PORTAL USER GUIDE FOR STATE ADMINS

On the **Invoices** List page, you can perform the following actions:

- Search – Search for a specific invoice by Name or invoice number.
- The **Invoices** page displays the following column details:
 - InvoiceTitle
 - Invoice
 - Project Name
 - Application Number
 - Amount
 - Status of the invoice: The table below shows the status description.

Status	Description
Cost posted	When an invoice is created by the planner.
Pending Payment	When payment is pending from the customer.
Payment received	Cust makes a payment.
Payment Posted	If the payment is successful.
Payment rejected	If a payment is rejected for some reason.

- Action items – Select the kebab menu icon  on the **Invoices** page to view or download the invoice details.



AMERICAN WATER

TST_ASGNR02

Invoices | APP-PA-330647477

← Back to Project View

Search by Name, Invoice number

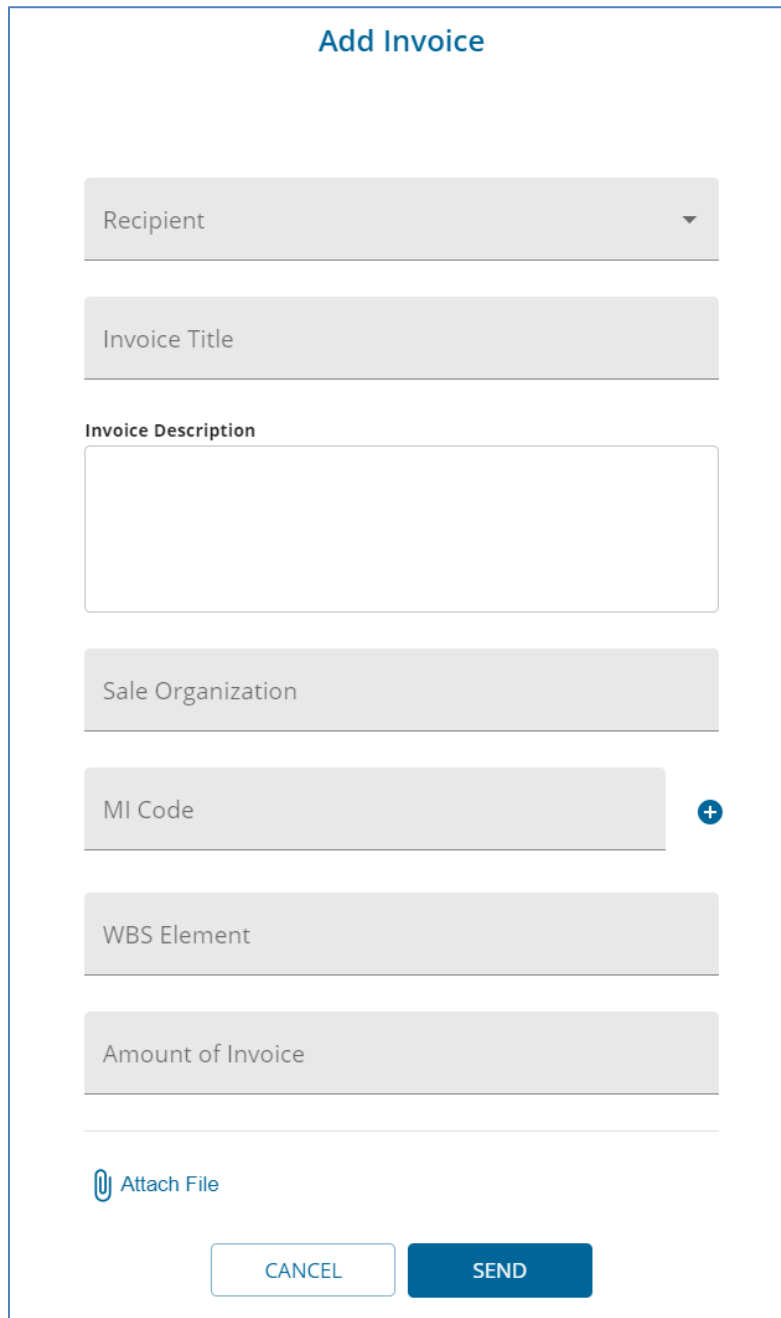
ADD INVOICES

Invoice Title	Invoice	Project Name	Application Number	Amount	Status
Invoice Details	4000284112	Residential	APP-PA-330647477	\$12.33	Pending Payment

View Details
Download

Adding Invoices

Select the **Add Invoices** button on the **Invoice** page to add invoices to the application. The **Add Invoice** window displays as shown here.



The 'Add Invoice' form is a modal window with a title bar. It contains several input fields: a dropdown for 'Recipient', a text field for 'Invoice Title', a larger text area for 'Invoice Description', a text field for 'Sale Organization', a text field for 'MI Code' with a plus icon to its right, a text field for 'WBS Element', and a text field for 'Amount of Invoice'. At the bottom left is an 'Attach File' link with a paperclip icon. At the bottom right are two buttons: 'CANCEL' and 'SEND'.

Add Invoice

Recipient

Invoice Title

Invoice Description

Sale Organization

MI Code

WBS Element

Amount of Invoice

Attach File

CANCEL SEND



Notes. The **Add Invoice** button is enabled only when the cost estimation task is completed. See [Cost Estimation](#).

Enter the following field details and select **Send** to send the details to the selected recipient.

- Select the recipient (Owner/Contractor)
- Enter the invoice title
- Enter the description of the invoice
- Enter Sales Organization details
- Enter the MI code and WBS element. (You can add multiple MI codes over here).
- Enter the invoice amount

You can also attach an invoice file using the **Attach File** option.



Notes. Invoices/Payments created will be applied across all the applications provided they are completed with all addresses tied to the bulk application.

Additionally, you can create an invoice from the Application Details page. See [Creating Invoice](#).

Managing Documents

You can view the list of documents attached for the project application initiated along with their date uploaded on the **Application Detail** page, under **Application Documents**. You can view all the uploaded documents, request any additional documents as well as Approve or Reject the document based on the project details.

APPLICATION DOCUMENTS		View all documents
Document Name	Uploaded	
Current Proposed Site Plan	06/18/2024	
Backflow Prevention Specs	06/18/2024	
Signatory File	06/18/2024	

Select the **View all documents** link to navigate to the **Documents** page.

The **Documents** page allows you to search for a specific document by document name, date, and status.

The **Documents** page displays the following column details:

- Document Name
- Submit Date
- Status:

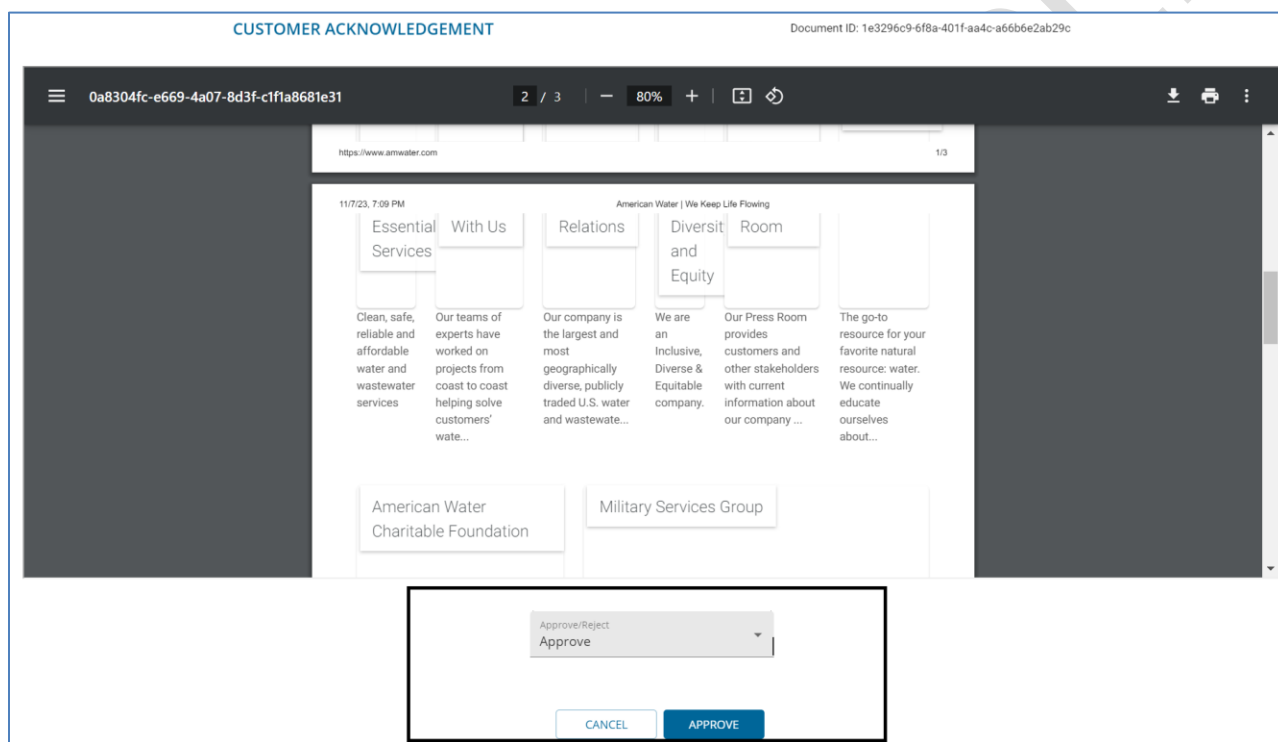
Status	Description
Not started	No document has been uploaded by the customer.
In progress	The document is being evaluated by the Planner.
Required	If the document has not been approved and sent for reupload.
Submitted	The user has uploaded and submitted the document.
Completed	The planner has reviewed and approved all the documents.

Choose the kebab menu icon (⋮) next to a document to directly view, email, and/or download the document.

Approving/Rejecting Documents

Select the specific document, and then select the **Approve** or **Reject** option from the dropdown list to open and review the document for further approval or rejection.



- **Approve** – Select **Approve** if the document is correct to execute the process. Once approved, the customer will be notified of the approval of the document.
- **Reject** - Select **Reject** if the document is incorrect or requires an update. Once you select the Reject option, you need to add a reason for the rejection. The customer will be notified of the rejection of the document with the rejection reason so that they can take action and upload the document again.



Requesting General Documents

Send the applicant an email requesting any general missing information once the application is reviewed. Select the **Make Request** button.

APPLICATION DOCUMENTS [View all documents](#)

Document Name	Uploaded
 Water Data Worksheet	03/28/2024
 Signatory File	03/28/2024

MAKE A REQUEST

DEMOLITION COMPLETED

The system displays the **Make a Request** popup window. Enter all the field details and select **Send**.

Make A Request


Request Type
General Information

Recipient

Document Type

Document Title

Document Description

 Attach File

CANCEL

SEND

Requesting Documents

Request a specific document that is required for the application to be processed further. Select the **Make a Request** button on the **Application Details** page.

The system displays the **Make a Request** popup window as shown here.

Complete the following field details and select **Send** to send the request:

- Select **Document** from the Request Type.
- Select the recipient from the dropdown list.
- Select Document Type (Customer Acknowledgment/Customer Input Required).



Notes. If **Customer Acknowledgment** is selected, the customer must acknowledge it, and if **Customer Input Required** is selected, the customer must upload the required document.

- Enter the Document Title and Document Description.
- Select **Attach File** to attach any specific file.

Creating Invoice

Select the **Make a Request** button on the **Application Details** page. The system displays the **Make a Request** popup window. Select **Invoice** from the **Request Type** dropdown list. Complete other field details and select **Send** to create an invoice.