# 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 >

# 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 PROJECTS** ..... **10**

MANAGING INQUIRIES ..... 10

*Inquiry Detail page* ..... *13*

*Requesting Documents* ..... *15*

*Promoting an Inquiry* ..... *17*

*Providing Estimate* ..... *18*

*Closing an Inquiry* ..... *19*

MANAGING APPLICATIONS ..... 20

*Application Detail Page* ..... *22*

Customer Details Section ..... 23

Project Details Section ..... 24

Managing Invoices ..... 25

Managing Documents ..... 29

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.

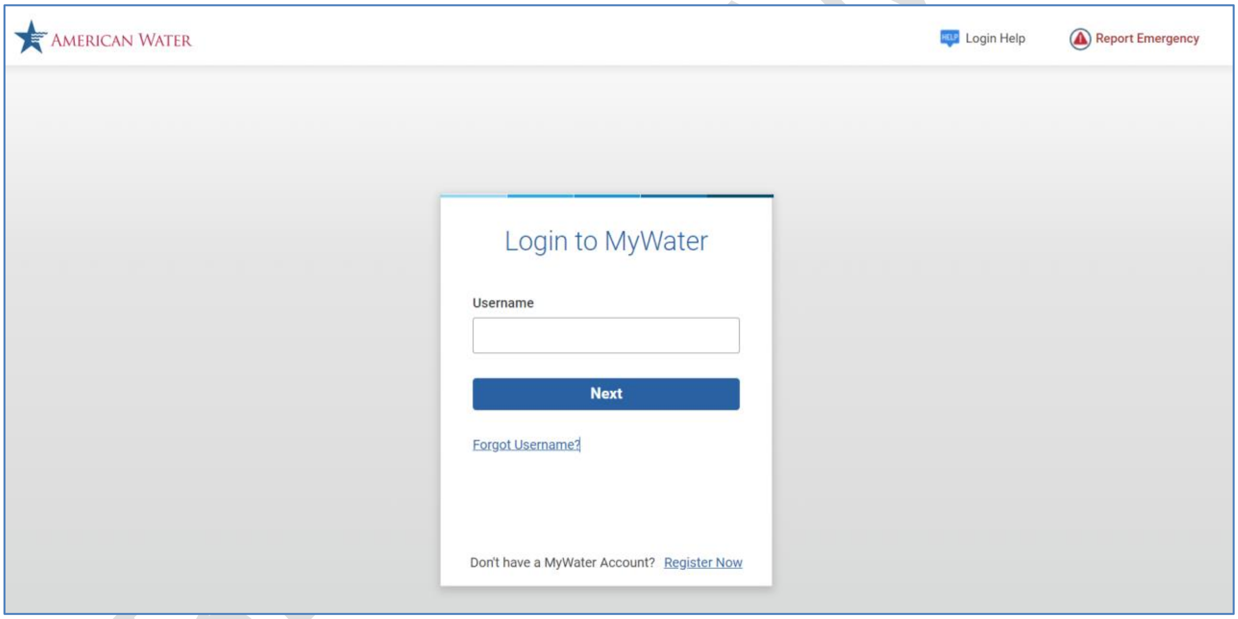
### LOGIN TO THE PORTAL

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.*

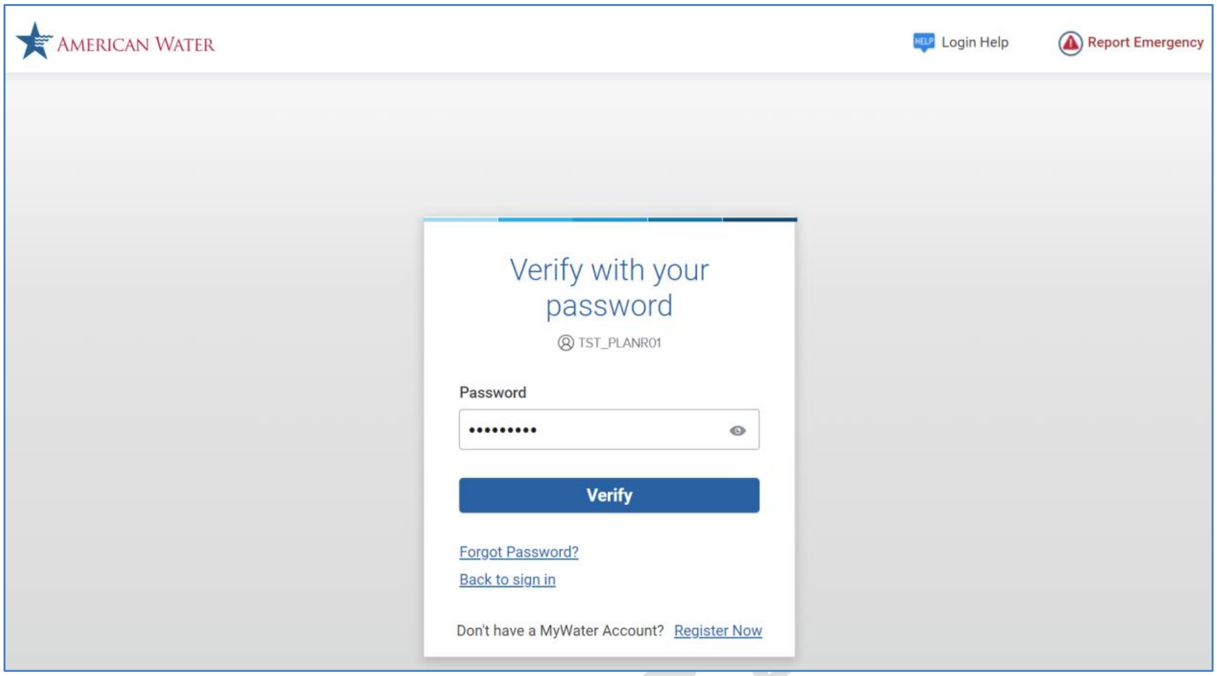
1. Navigate to the URL.

   The system shows the **Login To MyWater** page.

2. Enter your username and choose **Next**.



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



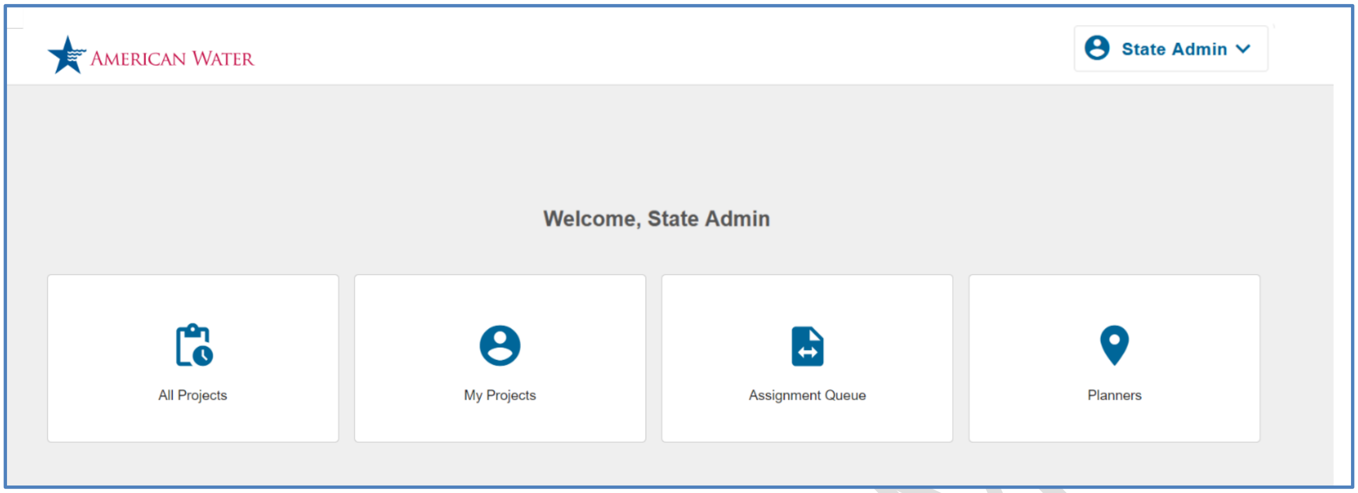

The system verifies your credentials and displays the Smart BX **Builder** page.

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.



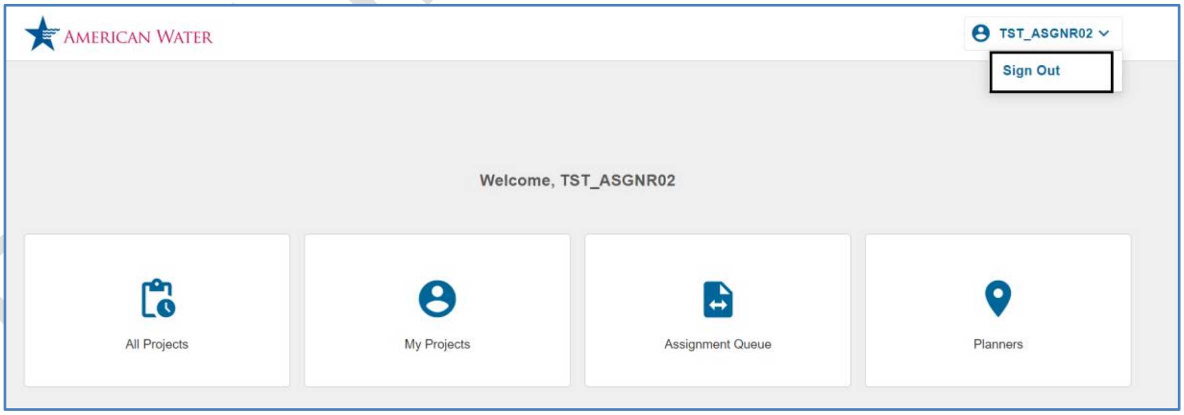

The **Home** page shows the following tiles:

- **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.**



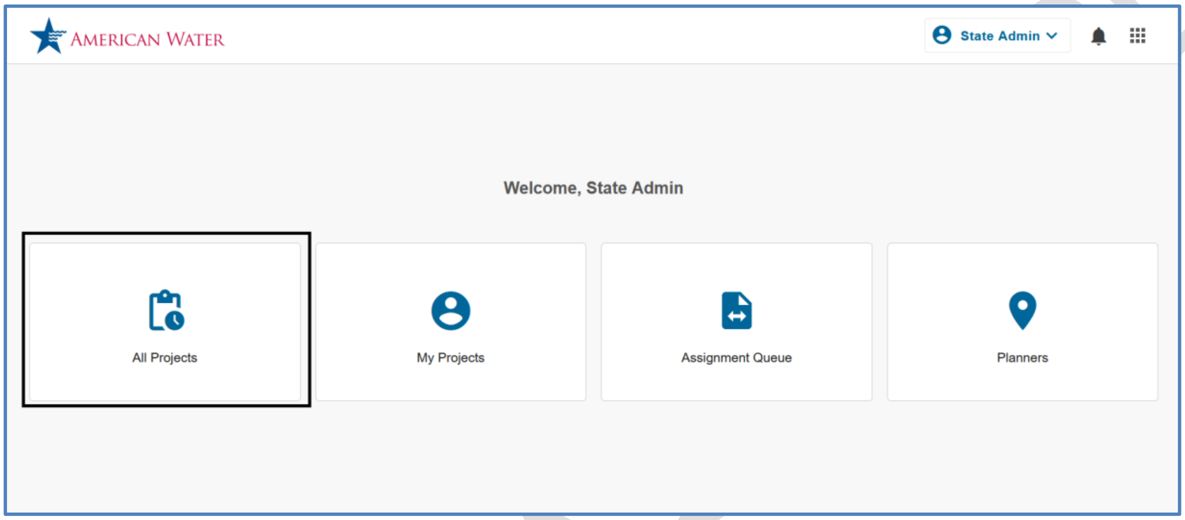
# ACCESSING ALL PROJECTS

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.

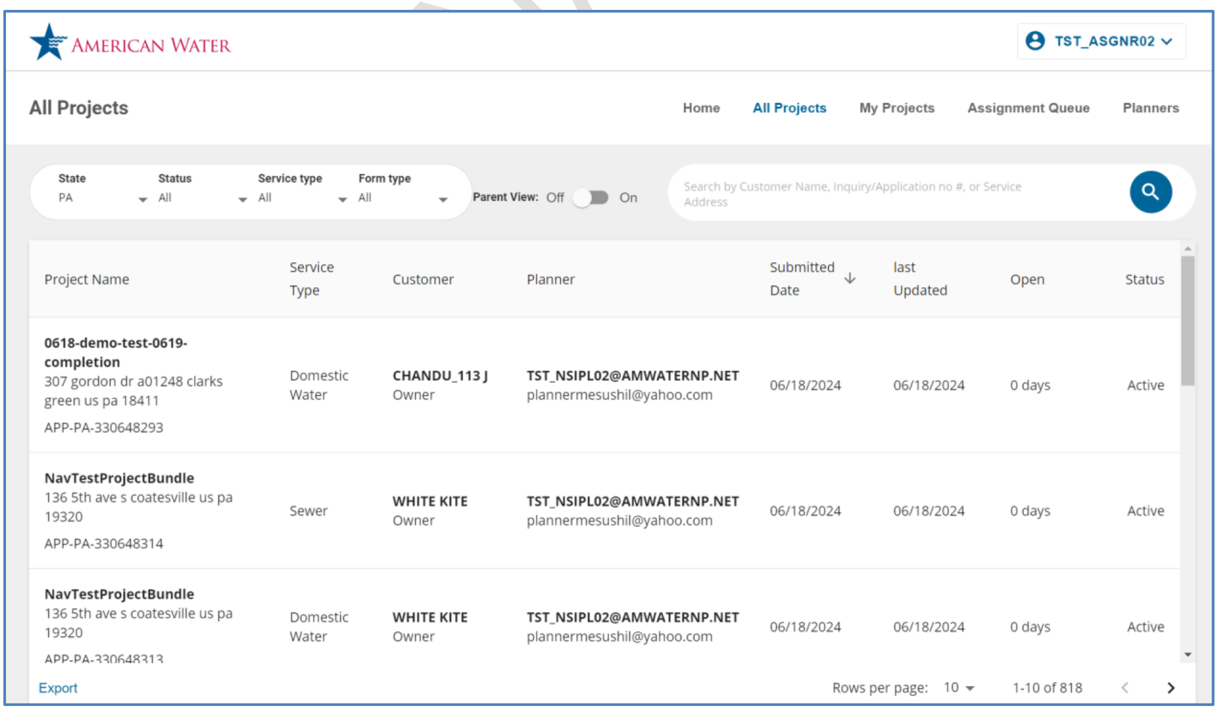



TABLE OF CONTENTS >

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

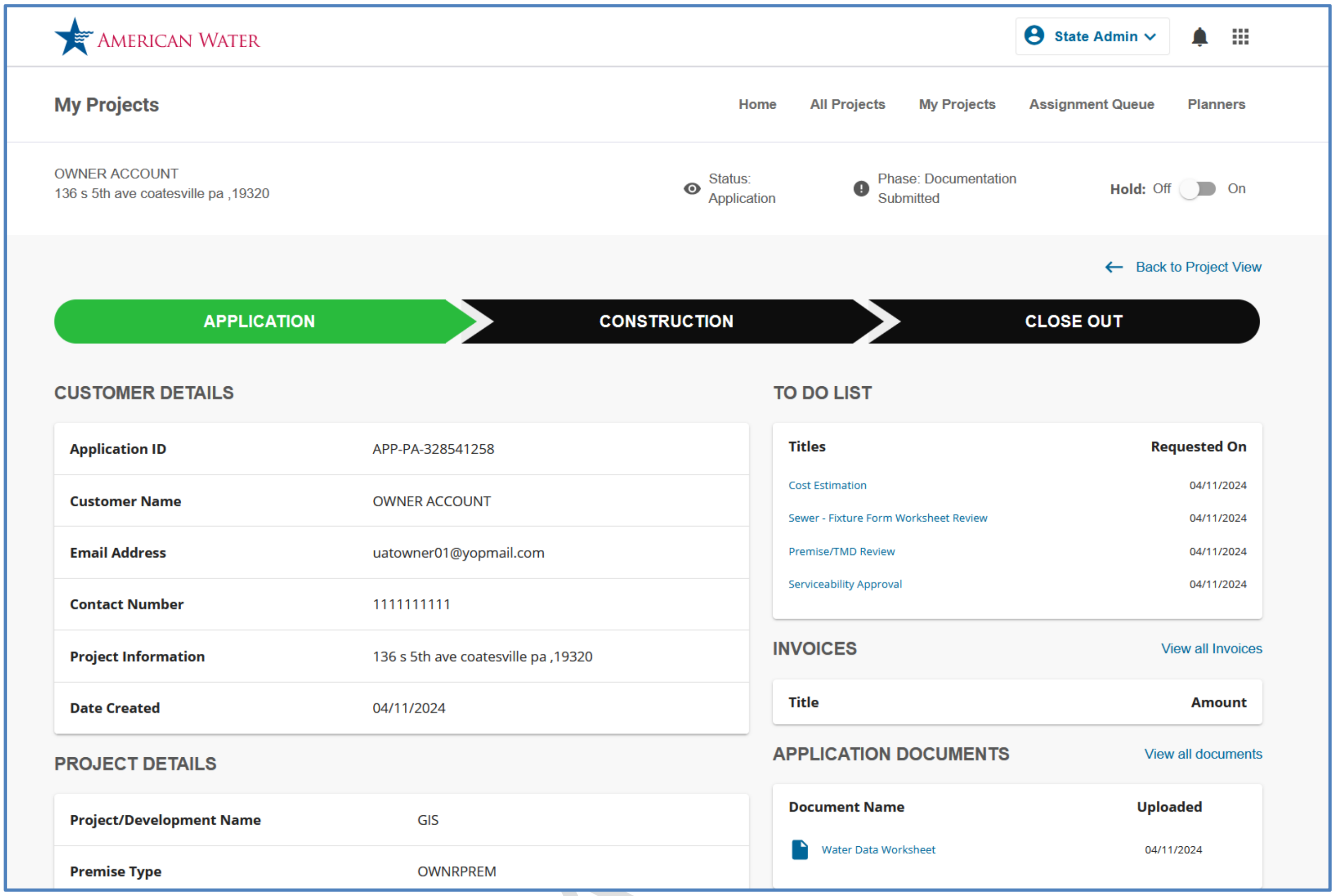
- State filter – Select any of the following from the dropdown list (CA, HI, IA, IL, IN, KY, MD, MO, NJ, PA, TN, GA, VA, WV).
- Status filter – Select from options (Active/Closed). **All** option is selected, by default.
- Service type filter – Select any of the following from the dropdown list (Domestic 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

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



# ACCESSING MY PROJECTS

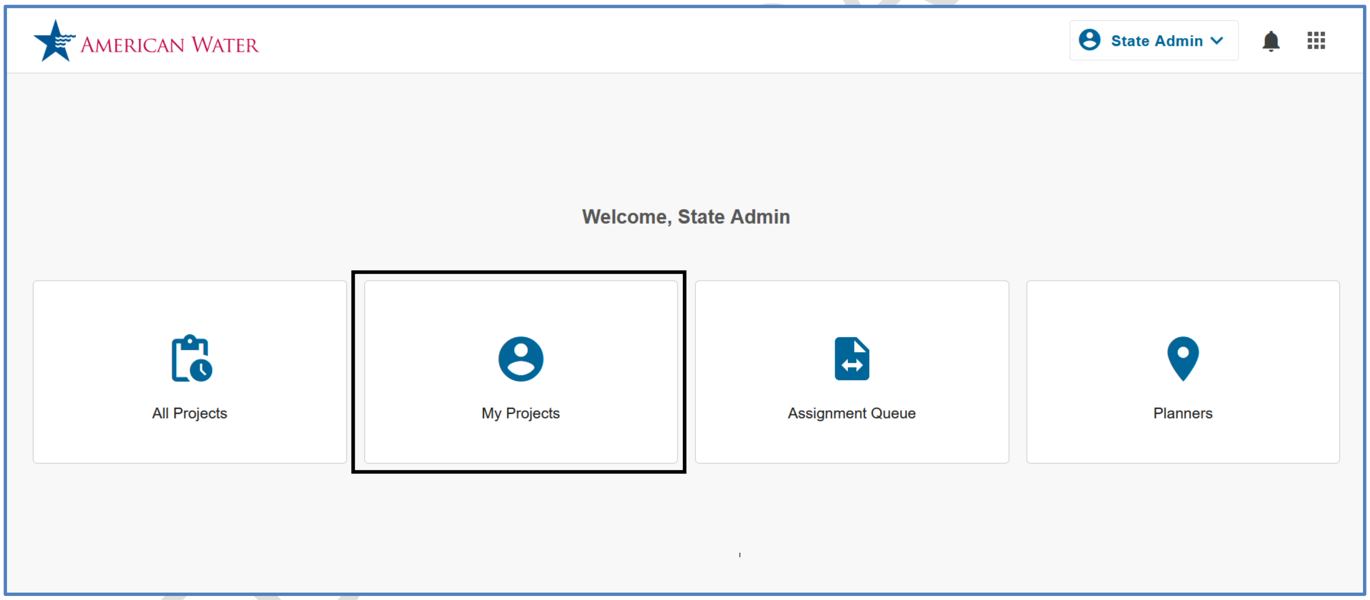
All the projects that you have assigned to yourself can be accessed from the **My Projects** tile. You can perform the following actions from **My Projects** as explained in the subsequent sections:

- Managing Inquiries
- Managing Applications
- Unassigning Inquiry/Application

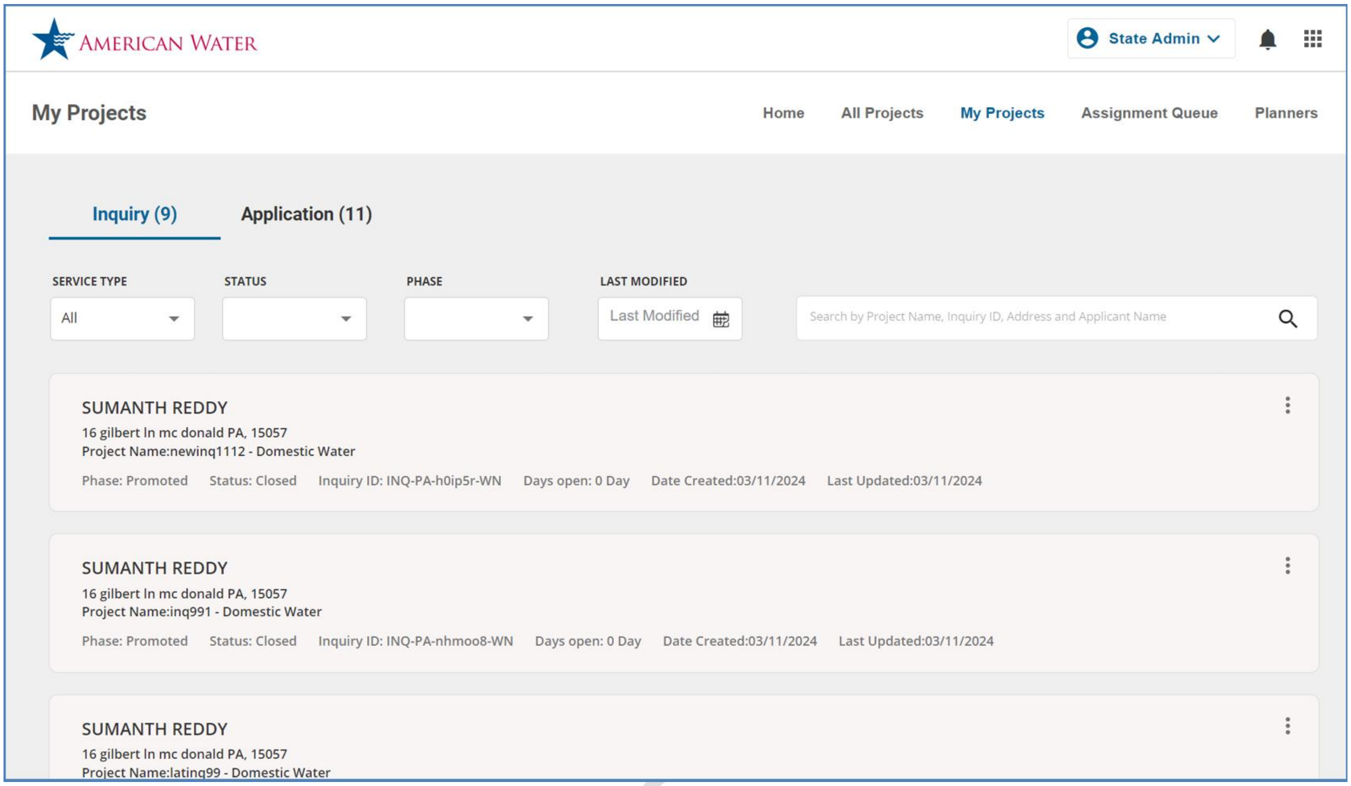
*Help Topic –*
*https://mapcall.awapps.com/Modules/mvc/HelpTopic/Show/##*

## MANAGING INQUIRIES

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



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.




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. |

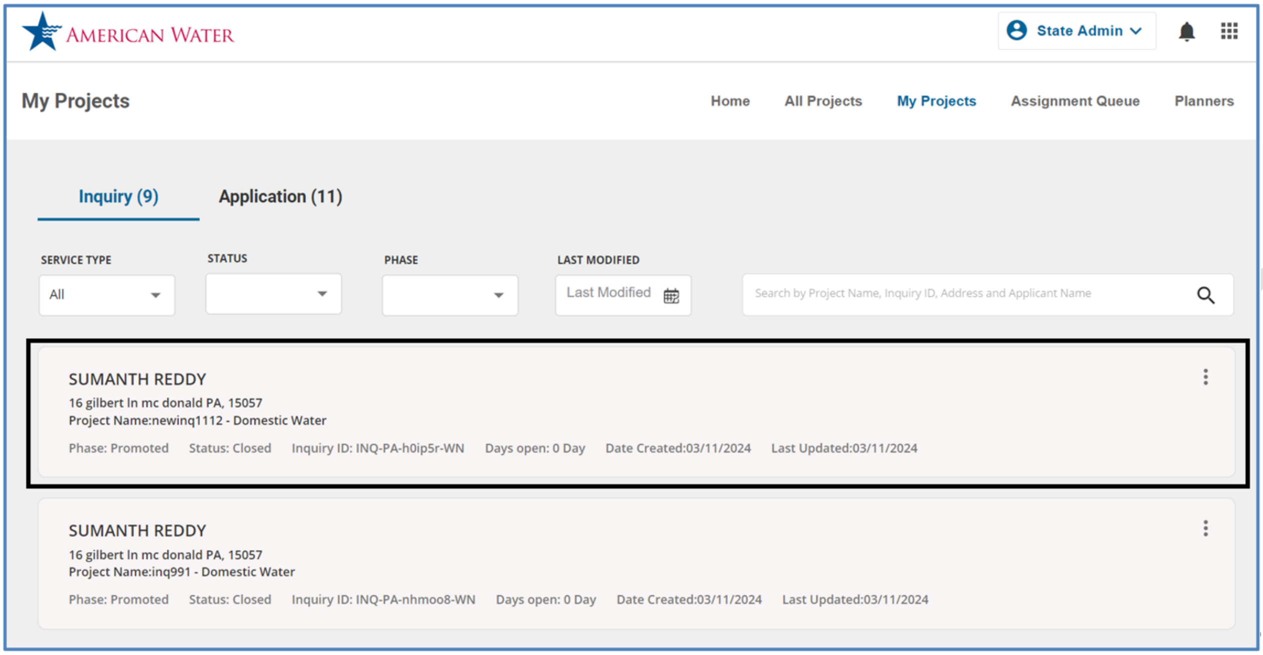
| Phase | Description |
|---|---|
| Not Serviceable | The inquiry comes under the red path, and an email notification is triggered to the state admin user. |
| Expired | When estimation & quotations are given by a planner, and it has not been worked upon by a customer for more than 45 days. |

- **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.




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.

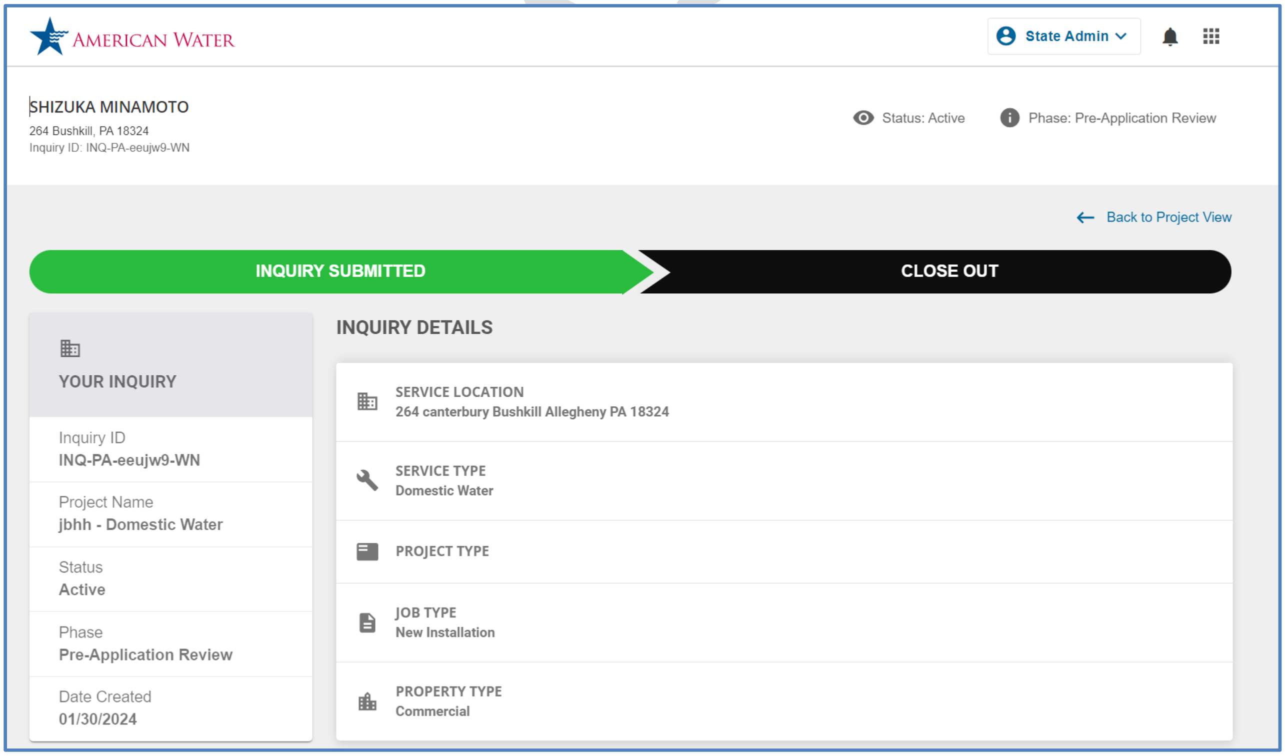
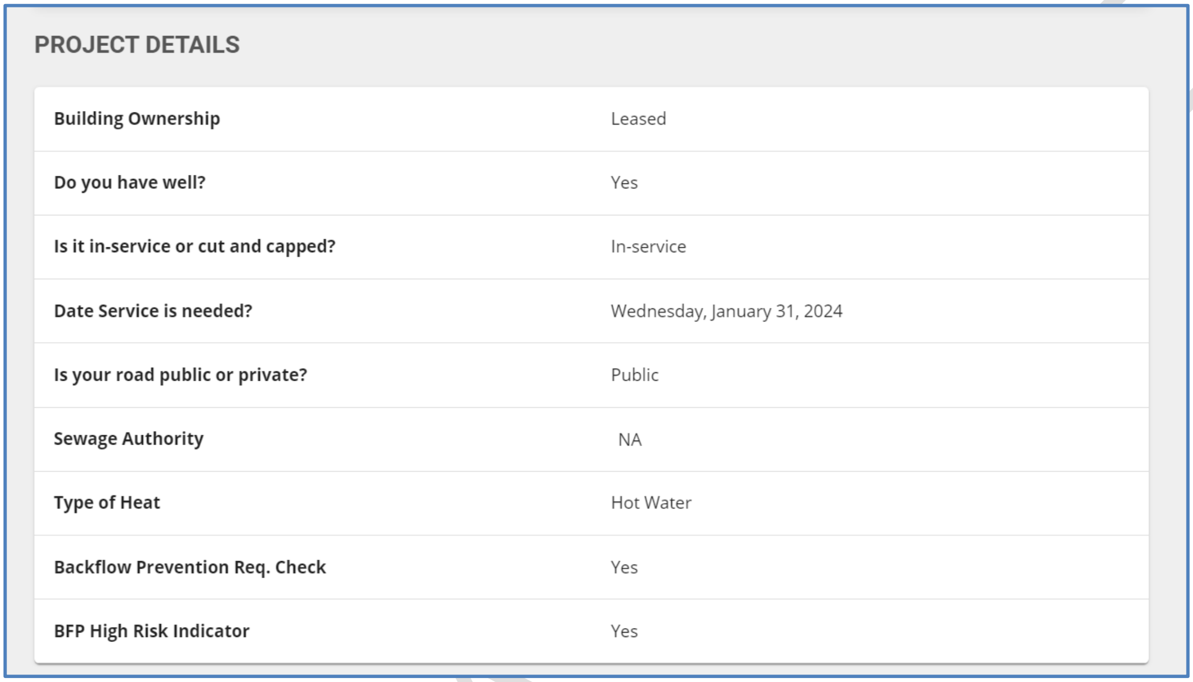



TABLE OF CONTENTS >


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.

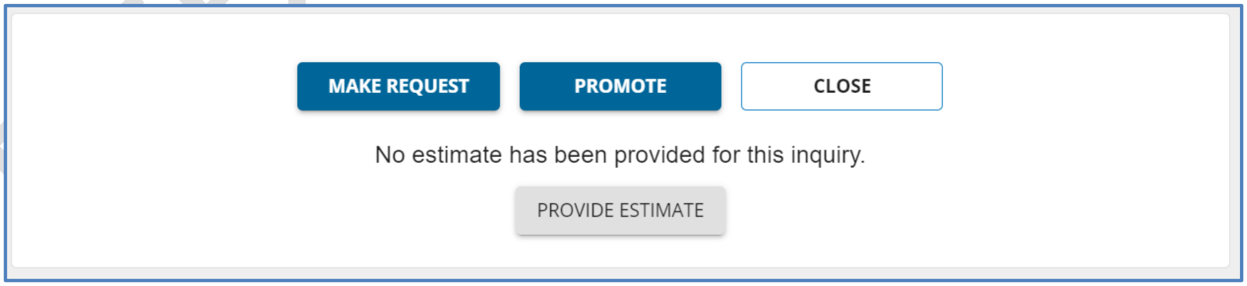


PROJECT DETAILS

| | |
|---|---|
| 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



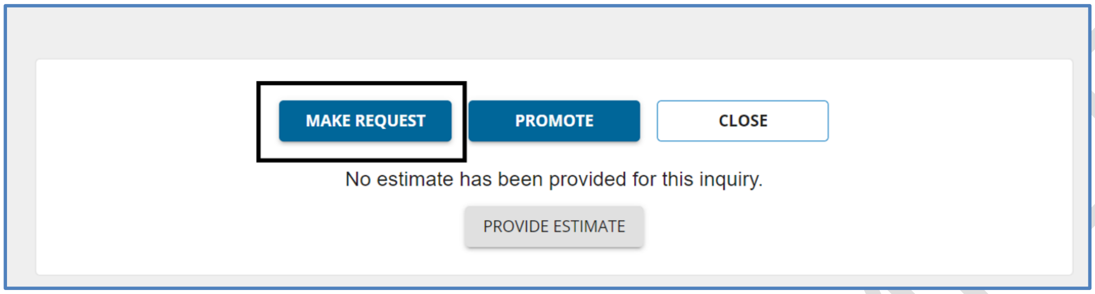

The subsequent sections describe the above action items in detail.

## Requesting Documents

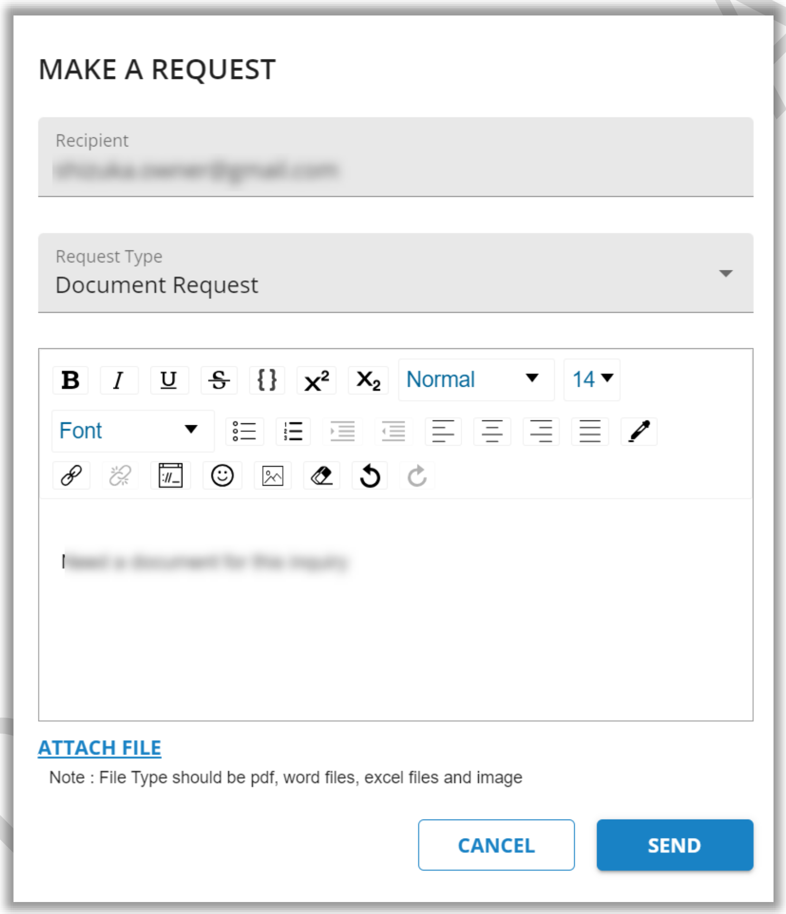
After reviewing the inquiry, you can request additional documents or any other information to provide a proper estimate for this inquiry. You can send the applicant an email directly using the **Make Request** option.

***To request additional information, perform the following steps.***

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




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

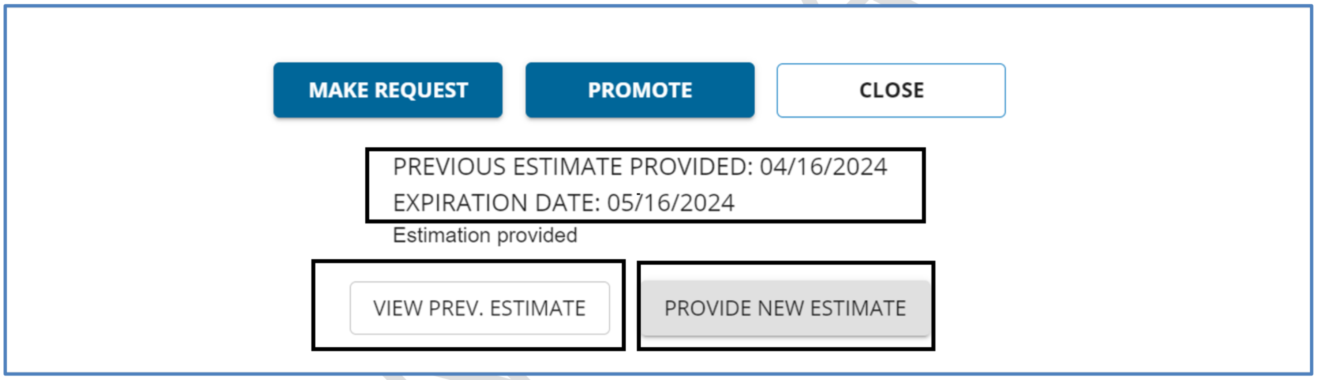



2. Select the **Request Type** from the dropdown list (Document Request or General Information).
3. Type the request detail in the message box.

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.

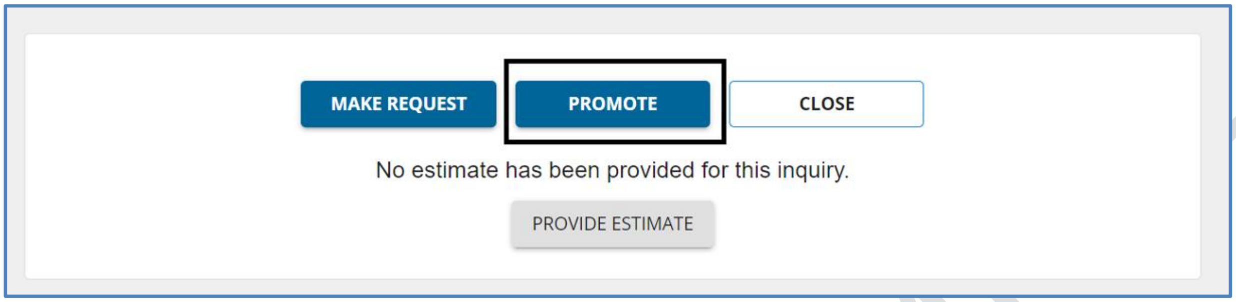


## Promoting an Inquiry

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.




The system prompts you to confirm.

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


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

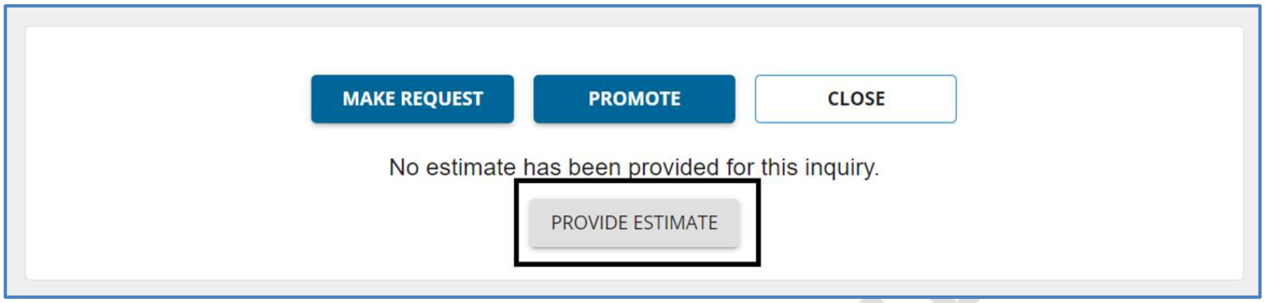
The status of an Inquiry automatically changes to **Closed** once this is promoted. The customer is notified when the Inquiry is promoted.

## Providing Estimate

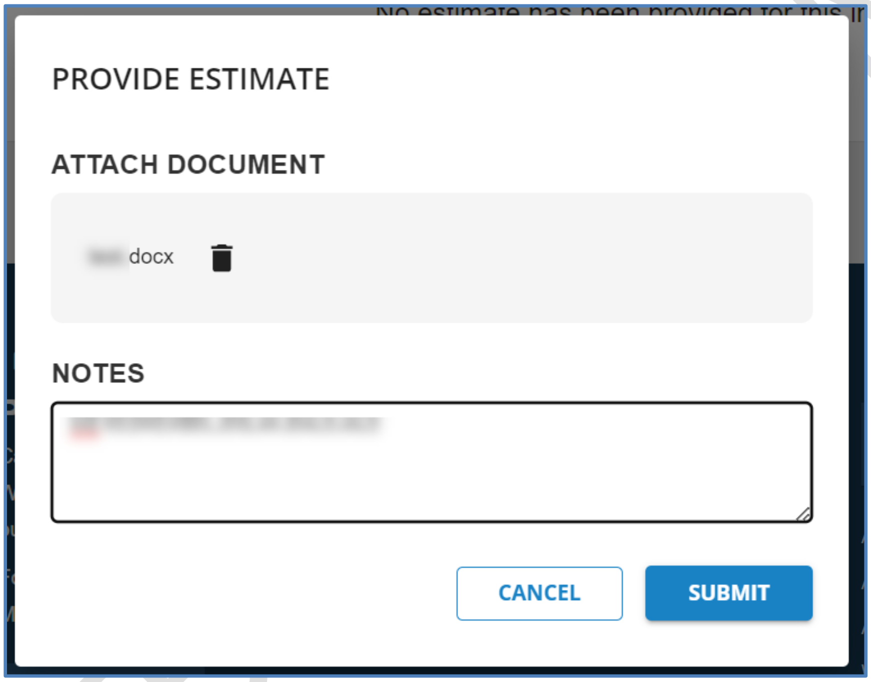
After reviewing the Inquiry in detail, you can provide an estimate for the cost of services.

***To provide an estimate, perform the following steps.***

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




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




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.

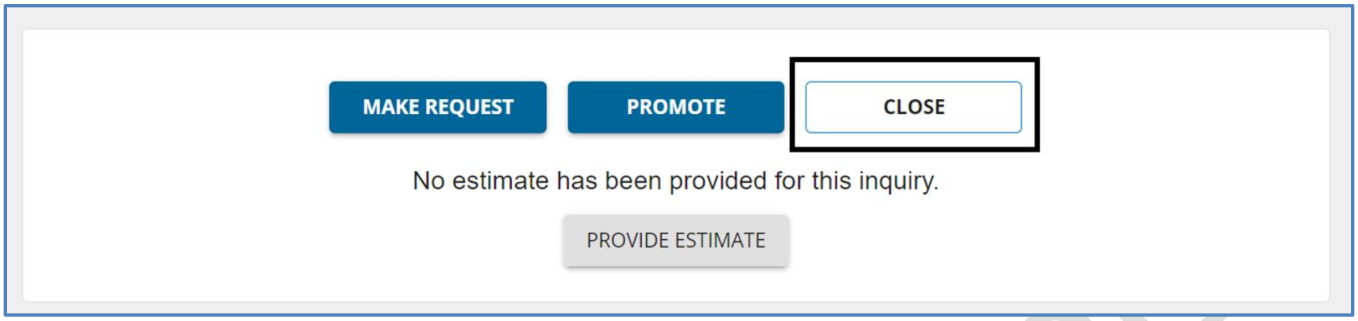
3. Enter your comments/messages in the **Notes.**

4. Select **Submit.**

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

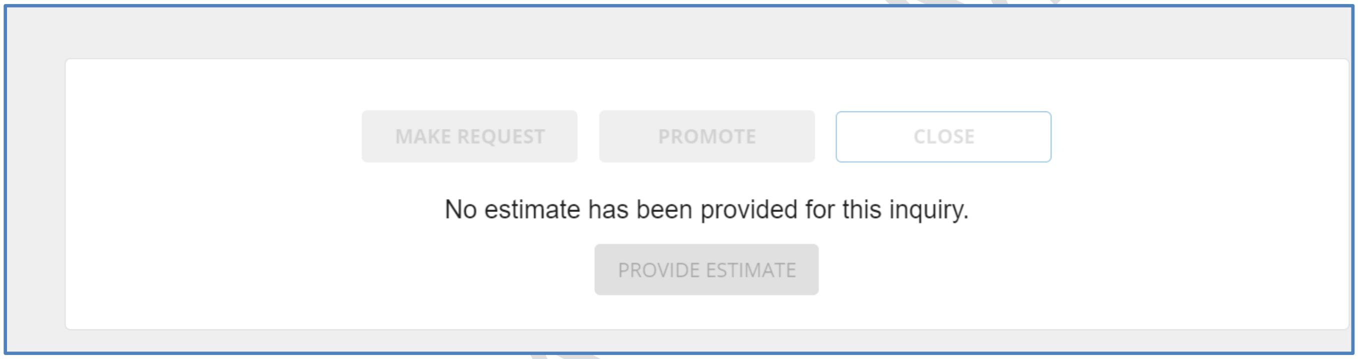
## Closing an Inquiry

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



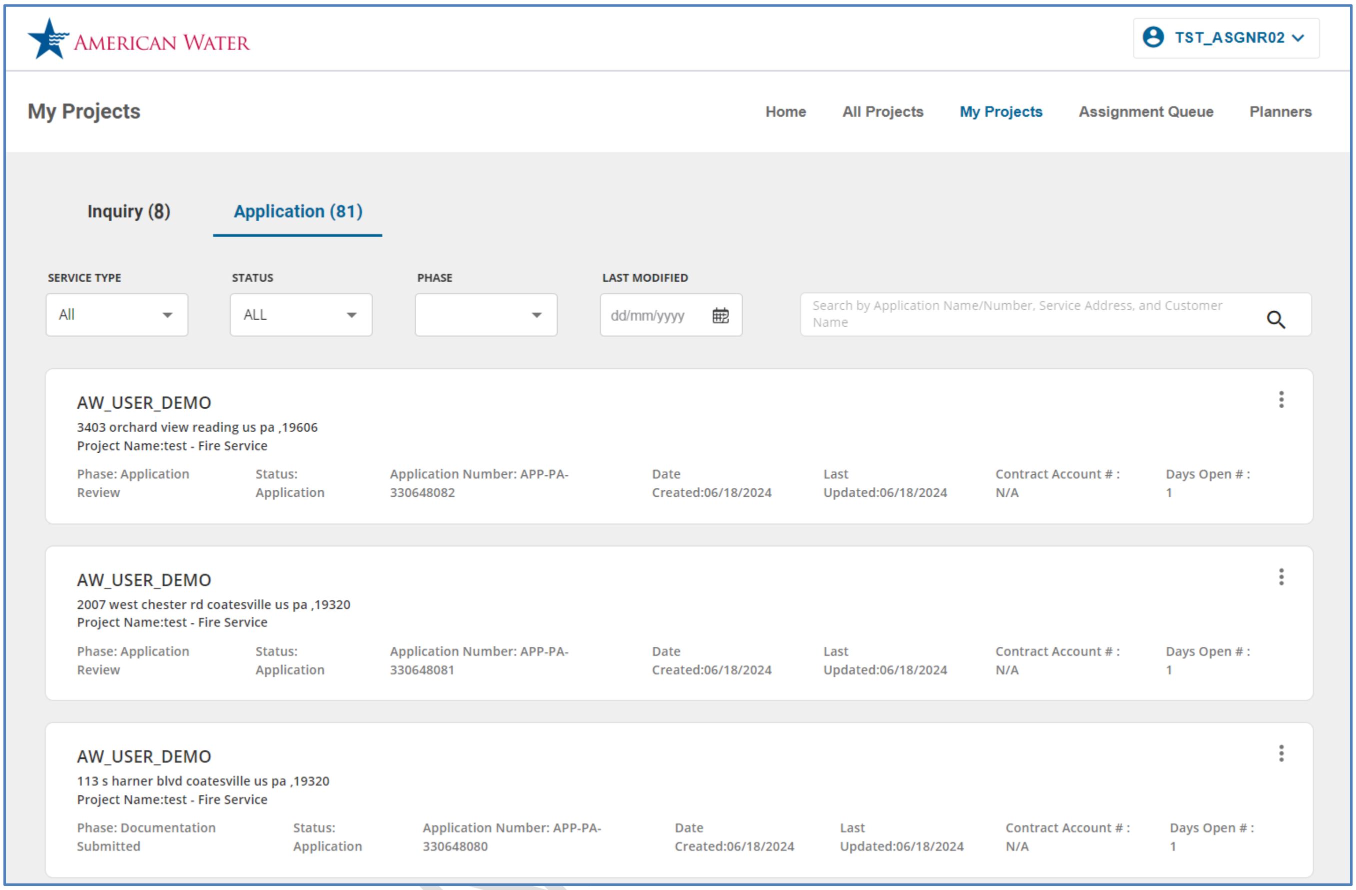

The system displays a confirmation message that the inquiry has been closed successfully.

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



## 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.




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

TABLE OF CONTENTS >

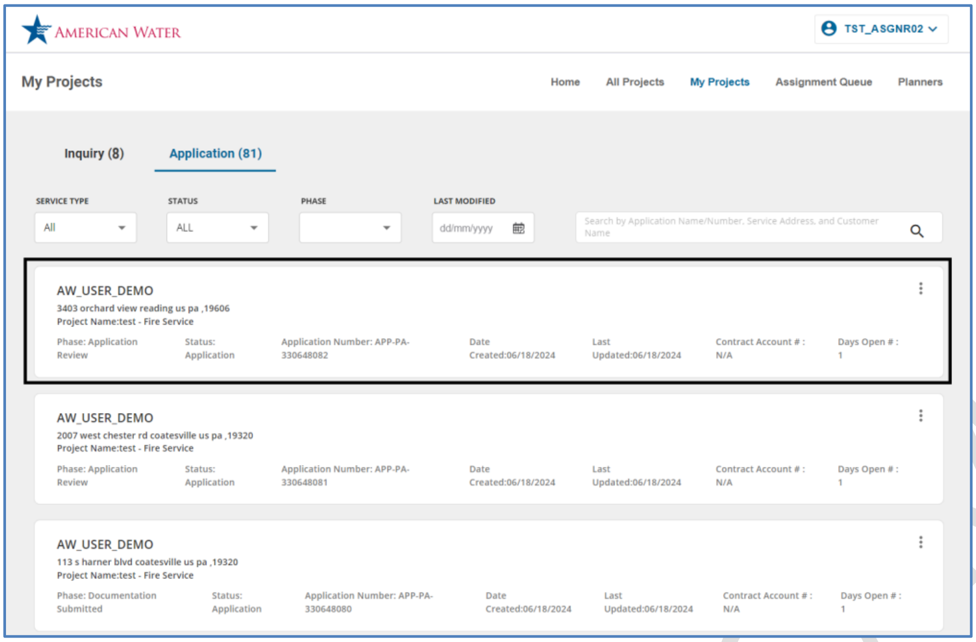
Completed Meter Installation Requires Customer Scheduling, Customer Communication Sent, Meter Order Scheduled, Meter Order Completed, Billing Activated, and Application Closed).

- **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.

## Application Detail Page

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






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.

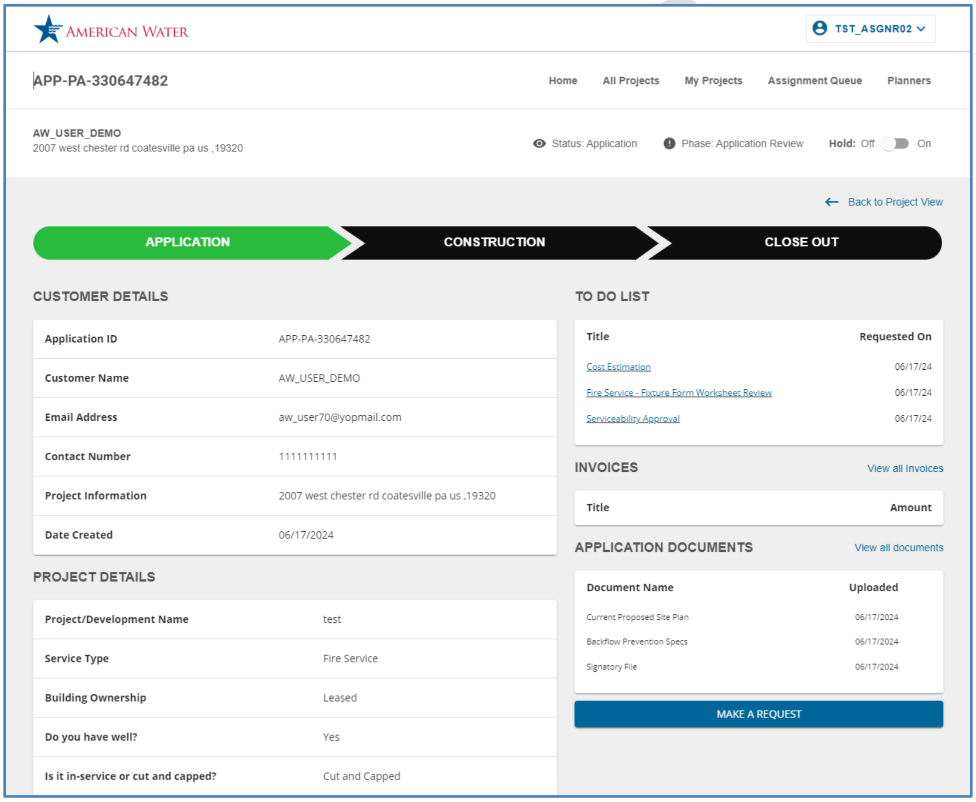



TABLE OF CONTENTS >

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

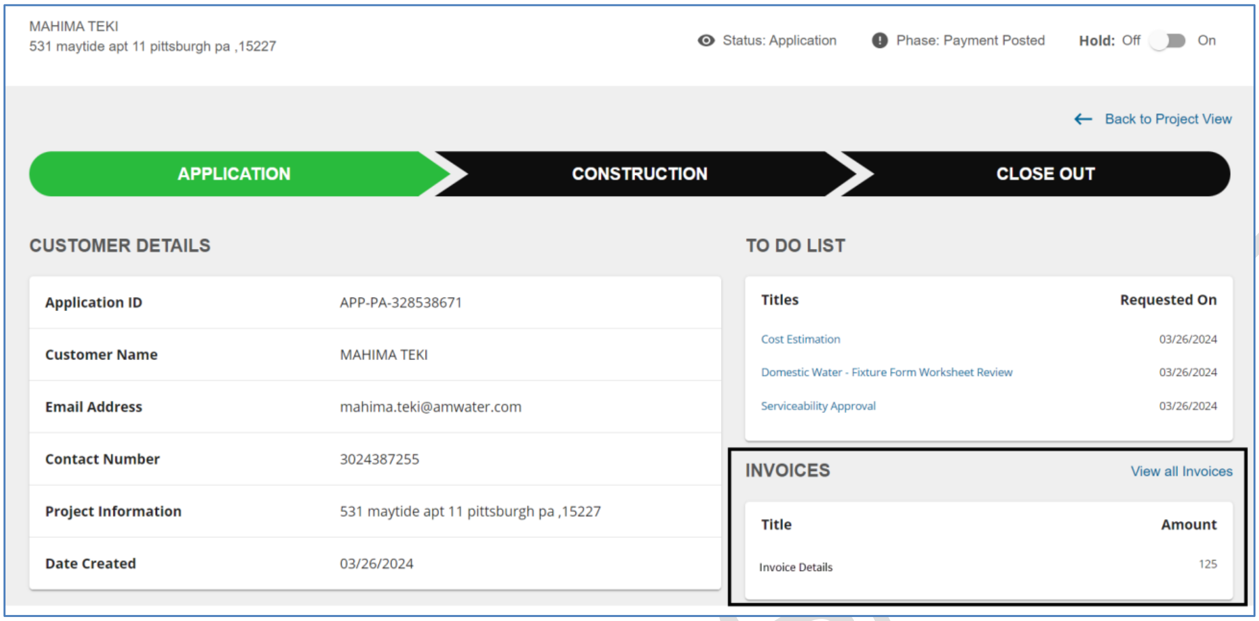
The **Project Details** section fields on the Application detail page are dynamic and depend on the selected state and service type for a project.

**PROJECT DETAILS**

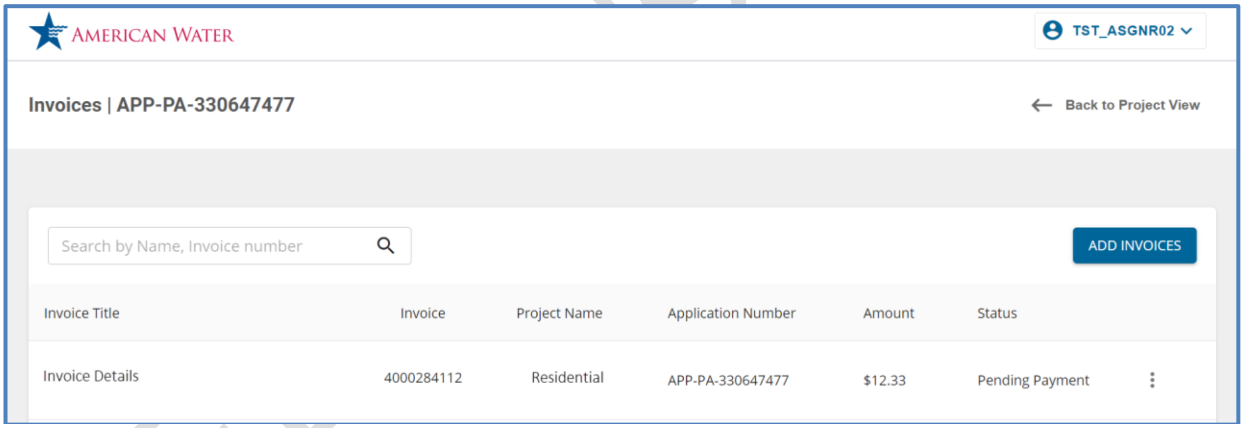
| | |
|---|---|
| **Project/Development Name** | NSLzone - Floor-1 |
| **Premise Type** | REC |
| **Service Type** | Irrigation |
| **Building Ownership** | Leased |
| **Do you have well?** | Yes |
| **Is it in-service or cut and capped?** | In-service |
| **Date Service is needed?** | Thursday, April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

## 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.




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

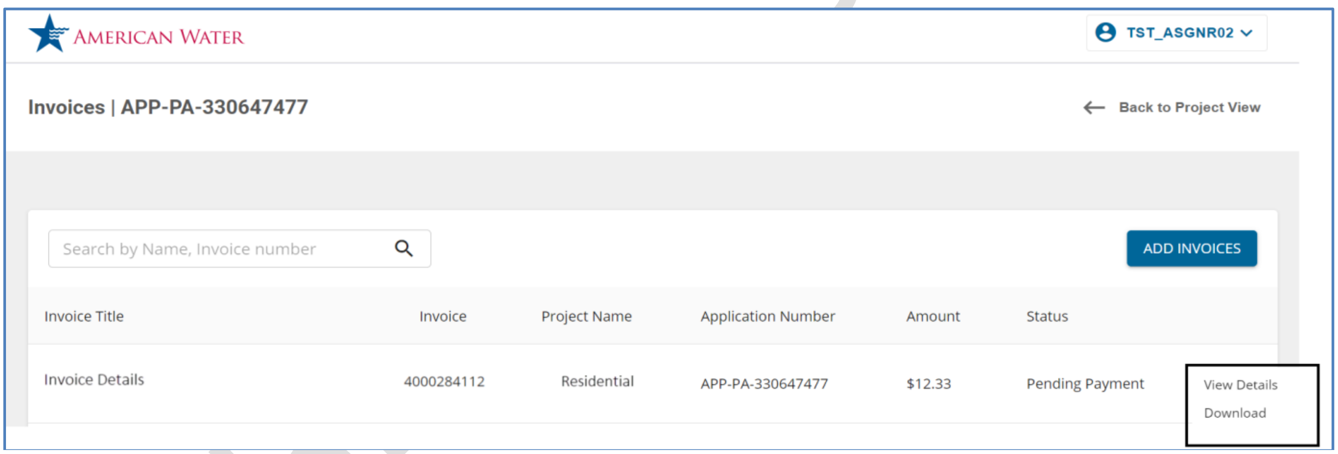


On the **Invoices** List page, you can perform the following actions:

- 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.

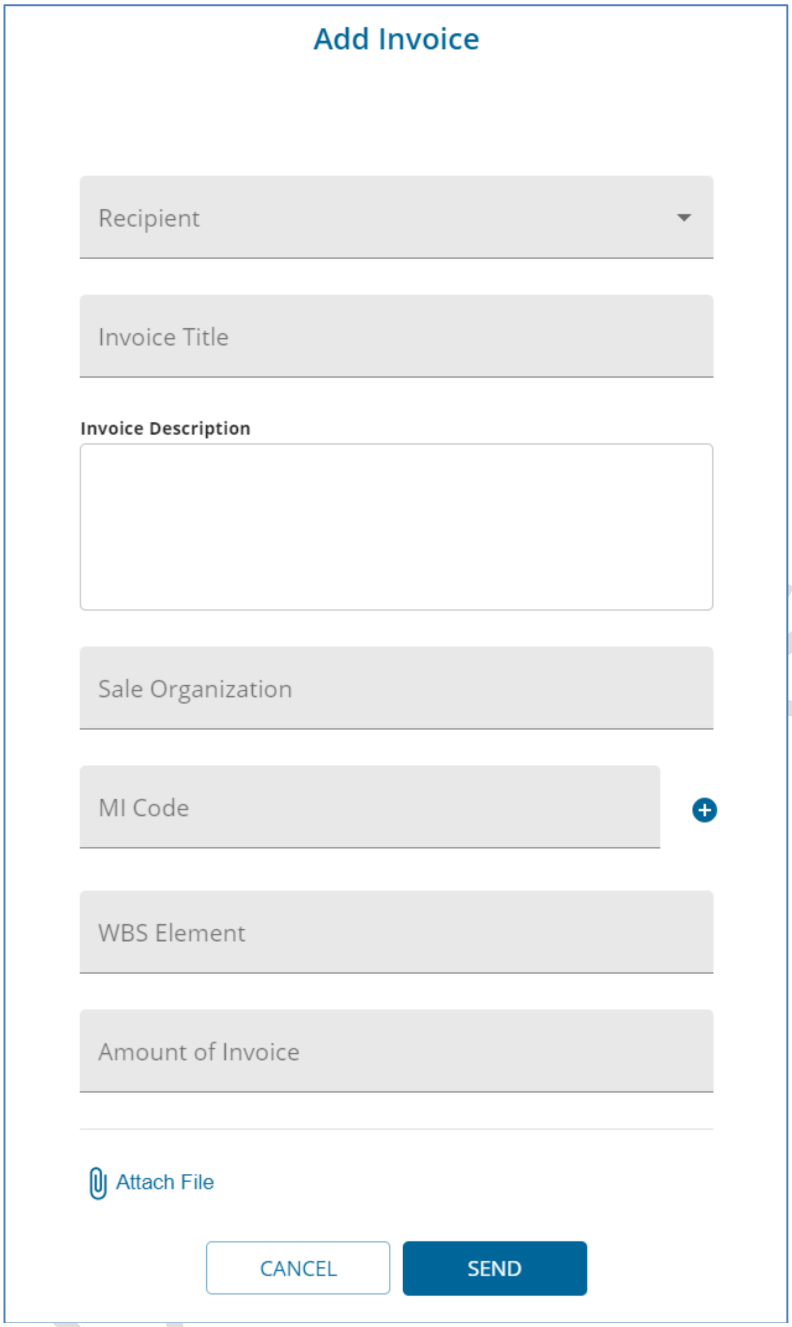
| Status | Description |
|---|---|
| Cost posted | When an invoice is created by the planner. |
| Pending Payment | When payment is pending from the customer. |
| Payment received | Cust makes a payment. |
| Payment Posted | If the payment is successful. |
| Payment rejected | If a payment is rejected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

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



### 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.






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.

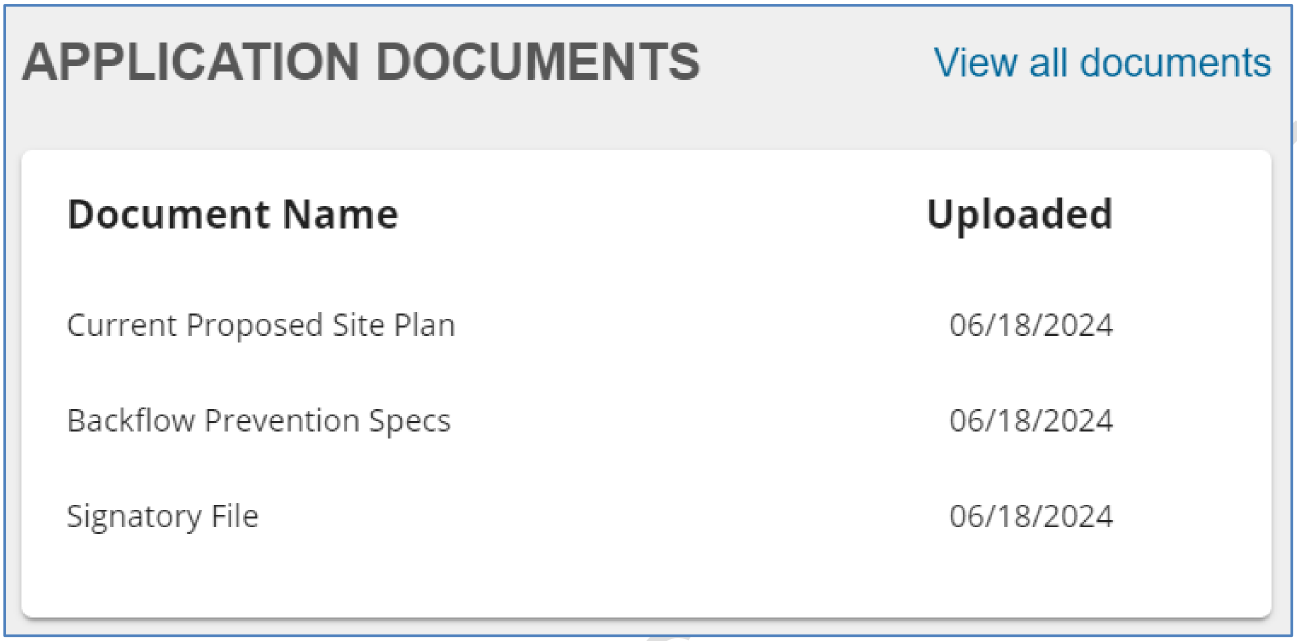
Note

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.




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.

TABLE OF CONTENTS >

## 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.

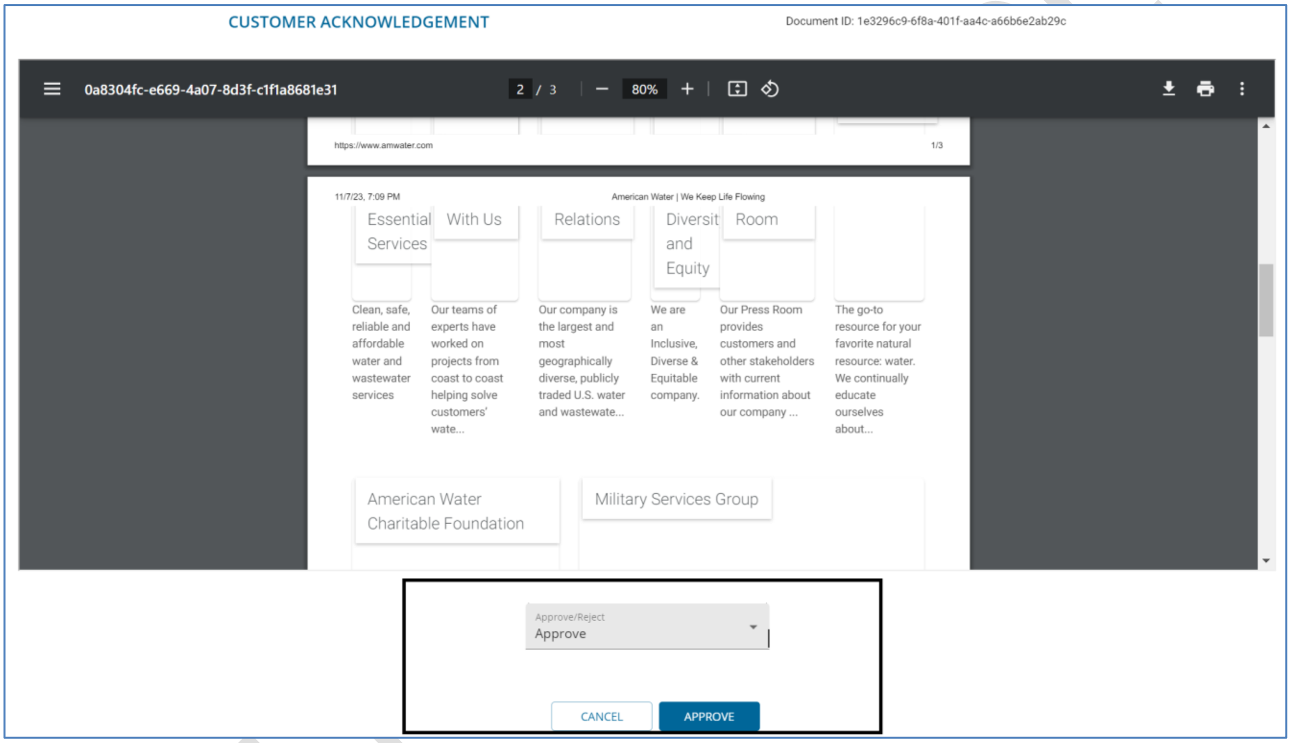
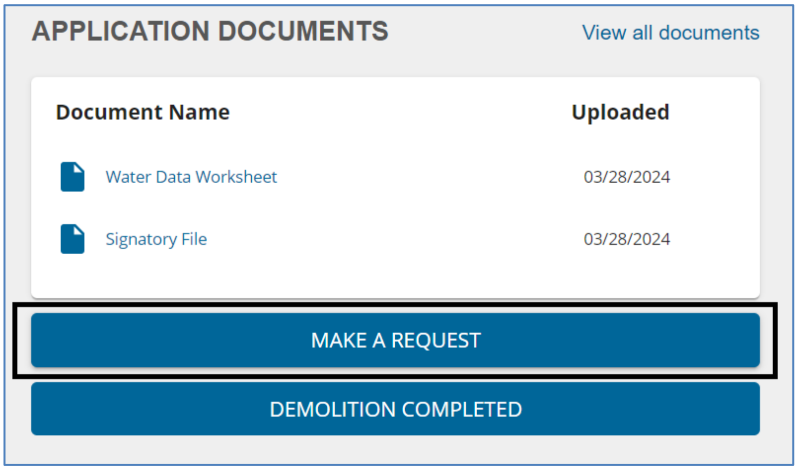


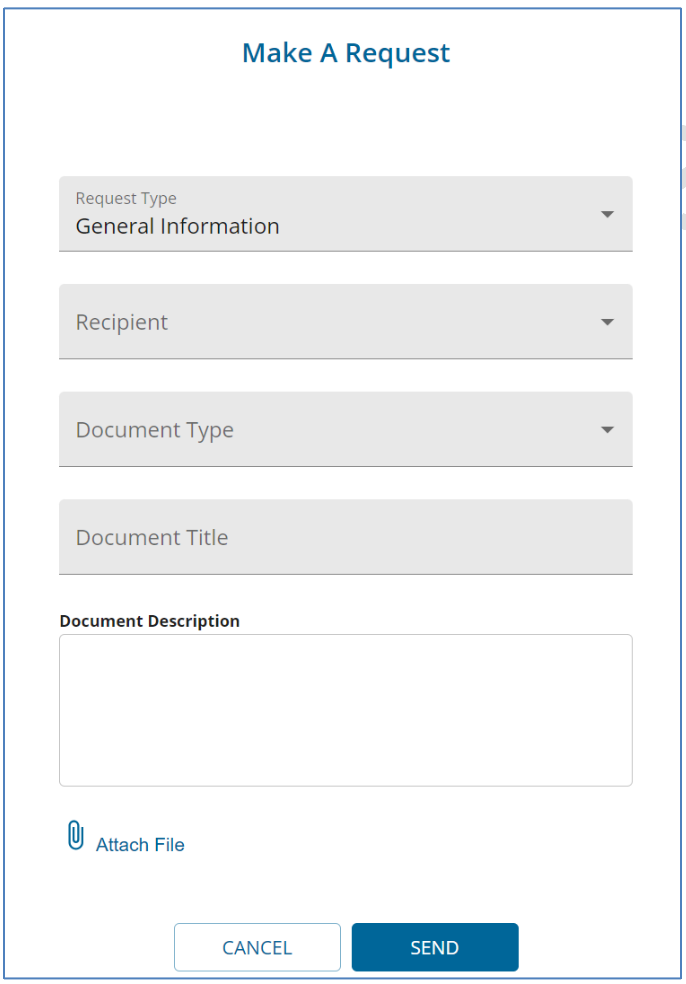

TABLE OF CONTENTS >

## Requesting General Documents

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




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



TABLE OF CONTENTS >