




# Quick Reference




# Customer Portal






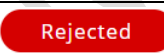
(User Guide page #s referenced below.)

URL: [Customer Service Portal Test Site link](#)

**Login:** Enter your username and password provided by your administrator.

Navigation:		
Topic	Icon	Description
Agency	 Agency	Click the Agency module tile.
Profile	 WELCOME, ADMIN 	Sign out.


Agencies > Pending Requests Tab:		
Topic	Icon	Description
The Pending Requests page displays all submitted registration requests from Agency users that are <u>pending approval</u> from American Water.		
Search		Click into the search field to enter agency details: keyword/#.
Status		Pending is the status of <u>all</u> submitted/ inbound registration requests.
Action Items		Click on either: <ul style="list-style-type: none"><li>• Approve/Reject</li><li>• View Details</li></ul>
Approve/Reject	Look-up Agency	Enter the Agency BP Number.  Click <b>Search</b> .  Click <b>Approve</b> or <b>Reject</b> .

Agencies > All Agencies Tab:		
Topic	Icon	Description
Contains a list of all Agency Portal user access requests that have been either <u>approved</u> or <u>rejected</u> by American Water. (Does not include the Pending status.)		
Search		Click into the search field to enter agency details: keyword/#.
Registered		Status of approved users who have clicked the registration activation link.
Action Item		Click on <b>Edit Admin User</b> > Select or invite a new admin or choose a new role or status.
Not Registered		Status of approved Agency portal users who have <u>not clicked the Activation Link</u> within their email.
Action Item		Click on the <b>Resend Activation link</b> .
Rejected		Users whose registration request for Agency portal access has been rejected.

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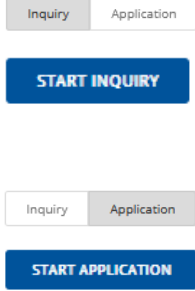
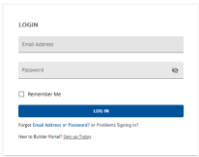

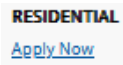
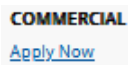




(User Guide page #s referenced below.)

Manage Users Tab:		
Topic	Icon	Description
Contains all approved Agency individual users. This page contains Agency users who are Active, Inactive, Invite Sent, or Locked.		
Add User	<div>Add User</div>	Invite an Agency portal user by completing the form including the role Viewer or Manager.  Click <b>Invite</b> .
Search	<div></div>	Click into the search field to enter agency user details: keyword/#.
Active	<div>Active</div>	Users who can currently access the Agency Portal.
Action Item	<div></div>	Click to View or Edit Access, Lock or Reset Password.
Inactive	<div>Inactive</div>	Users who were previously Active and are now Inactive.
Action Item	<div></div>	Click to edit user role, contact number, access until, and status. Click <b>Save</b> .
Request Sent	<div>Request Sent</div>	Users who have been sent an email invite but have not clicked the activation link.
Action Item	<div></div>	Click to resend the email invite.
Locked	<div>Locked</div>	Users whose account has been temporarily locked.
Action Item	<div></div>	Click to View or Edit Access or Unlock.
Blocked IP	<div> <b>BLOCKED IP</b></div>	Click to unblock any Blocked IP Addresses. (Multiple unsuccessful account login attempts from the same IP.)

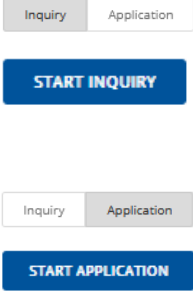
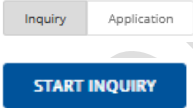
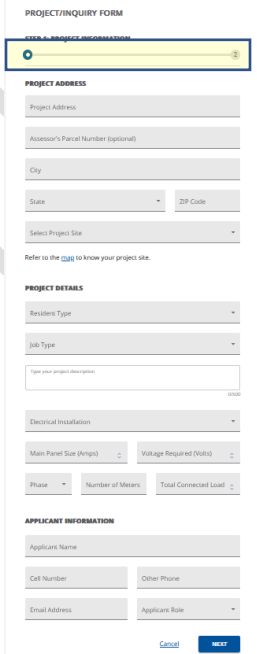
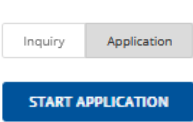
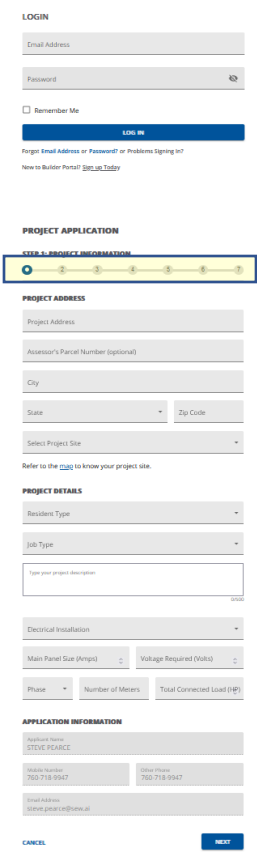
Report Tab:		
Topic	Icon	Instructions
Pledges Report	View pledge history on a table report. <div>Agency Name AW AGENCY</div> <div></div> <div>Download Pledges</div>	Use the Agency Name dropdown to select the agency.  Search by Customer Name, Organization Name, Account Number.  Date filter.  Download pledge history search results (to Excel).
Topic	Status	Description
Status (SAP business rules)	Cancelled	Pledge was canceled by the SAP business rules.
	Expired	When the unfulfilled pledge exceeds the expiration date.
	Fulfilled	When payment has been completed.
	Unfulfilled	When payment is not completed.
Action Icon	View Details	Click to view the customer details.

(User Guide page #s referenced below.)

Customer Dashboard (pg #)


Topic	Icon/Button	Description
Apply Now		You must be <b>Logged In to Apply</b> and you must be <b>registered to Log In</b> .
Inquiry or Application		Will you be making an Inquiry as the first step to then become an application later or will you start the Application process directly? It is <b>not necessary</b> to Log in or to have registered to submit an <b>Inquiry</b> . You must have registered and Logged In to submit an application.
Login Now		Login here or request login assistance for your login credentials (username/password)
No Login Required		Pre-login Links on the Login page include: <ul style="list-style-type: none"><li>New Construction Resources</li><li>Developer Contacts</li><li>Energy Regulations</li><li>Energy Rates</li><li>Distributed Generation Interconnection</li></ul>
Application Types		Application specifically for this job type.
		Application specifically for this job type.
		Application specifically for this job type.
Other Application Types		Application specifically for this job type.
		Application specifically for this job type.
		Application specifically for this job type.
Guides and Planning Documents	Developer Energy Planning Guide	Pre-login download of project-relevant PDF.
	Customer Service Proposal Pricing Sheet	Pre-login download of project-relevant PDF.
	Customer Service Proposal Residential Subdivision Fees	Pre-login download of project-relevant PDF.

Application Management (pg #)

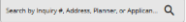
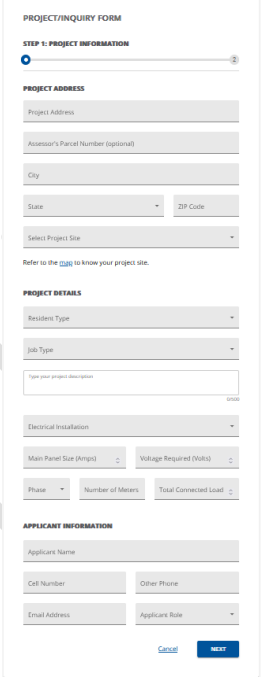
Topic	Icon/Button	Description
Inquiry or Application		Will you be making an Inquiry as the first step to then later become an application or will you start the Application process directly? It is <b>not necessary</b> to Log in or to have registered to submit an <b>Inquiry</b> . You must have registered and Logged In to submit an application.
Inquiry		 <p>There are generally only two steps to an Inquiry. Inquiries can be “promoted” to become an application by the Utility Admin</p>
Application		 <p>There are multiple steps in the application process. In a later step, different documents will have to be attached. The requested documents and the application questions vary depending on the type of application.</p>

(User Guide page #s referenced below.)

Application Management (pg #)

Topic	Icon/Button	Description
Notification Dashboard		Communication from the Utility to the customer arrives here and the customer can reply to those messages.
Inquiries		<div><div>INQUIRIES</div><div>APPLICATIONS</div></div> <p>Choose Inquiries to see a current list of Open and Closed Inquiries. An Inquiry is automatically closed when “promoted” to Application status.</p>
Applications		<div><div>INQUIRIES</div><div>APPLICATIONS</div></div> <p>Choose Applications to see a current list of Applications.</p>
Inquiries List Filter	Filter the list of Inquiries based on the dropdown menus	<div><div>Type</div><div>All</div><div>Status</div><div>All</div></div>
	Type filter	<div><div>Type</div><div>All</div><div>All</div><div>Overhead Service</div><div>Underground Service</div></div>
	Status filter	<div><div>Status</div><div>All</div><div>All</div><div>Active</div><div>Closed</div></div>
Applications List Filter	Filter the list of Inquiries based on the dropdown menus	<div><div>Type</div><div>All</div><div>Status</div><div>All</div><div>Phase</div><div>All</div></div>
	Phase filter	<div><div>Phase</div><div>All</div><div>All</div><div>Application</div><div>In Development</div><div>Closed Out</div></div>

Application Management (pg #)

Topic	Icon/Button	Description
Search Field		Search by Inquiry, Planner, or Application.
New Inquiry	<div>+ NEW INQUIRY</div>	Click to create a new Inquiry
		<p>There are generally only two steps to an Inquiry. Inquiries can be “promoted” to become an application by the Utility Admin</p> 
New Application	<div>+ NEW APPLICATION</div>	Click to create a new Application.
	PROJECT APPLICATION OVERVIEW	<p>Project Application Overview will guide you through the <b>INITIATION, ENGINEERING, CONDUIT INSTALLATION, CONSTRUCTION, and INSPECTION</b> steps. There is also a list of, and links to, <b>Application Forms, Engineering Documents, Rights of Way and Easements</b> and information for <b>PV/DG Projects</b>.</p> <p>Before beginning the application, it is important to download the <b>Application Checklist</b> and the <b>Credit Establishment Requirements</b>.</p>
	<div>BEGIN APPLICATION</div>	Fill out the 7-step application and provide the requested documents.

(User Guide page #s referenced below.)

Application Review and Tracking  
(pg #)

Topic	Icon/Button	Description
Inquiry	<div><div>INQ-IV-0579</div><div>Submitted: 04/18/2022</div><div>Applicant: Steve Pearce</div></div>	Having already signed in, click on an Inquiry in the list.
Application	<div><div>123 Main - Zone I</div><div>Last update: 04/18/2022</div><div>Owner: STEVE PEARCE</div></div>	Having already signed in, click on a Project in the list.
Application Details Page	<div><div><div>Project List</div><div>Project Details</div><div>Documents</div><div>Invoices</div></div></div>	
	Project List	Click here to return to the List page.
	Project Details	Clicking here is the same page where you currently are.
	Documents	The documents that must be uploaded are saved here.
	Invoices	This is a list of incurred charges that have been invoiced.
Your Project	<div><div><div>YOUR PROJECT</div><div><div>Application ID#</div><div>PRO-IV-0581</div></div><div><div>Project Name</div><div>123 Main - Zone I</div></div><div><div>Date Created</div><div>04/18/2022</div></div><div><div>SAP ID</div><div>N/A</div></div></div></div>	Application or Inquiry ID#, Applicant Name, Phase and Date Created
Your Planner	<div><div><div>YOUR PLANNER</div><div><div>IID PROJECT PLANNER</div><div>Gabriel Ramirez</div></div><div><div>EMAIL</div><div>gramirez@iid.com</div></div><div><div>PHONE</div><div>760-457-5909</div></div><div><div>CELL</div><div>760-339-9257</div></div><div><div>CONTACT</div></div></div></div>	Your planner Name, Email, Phone, and Mobile Phone
HAVE A QUESTION	<div><div><div>HAVE A QUESTION?</div><div>Schedule a time and we'll get back to you promptly to discuss your project.</div><div><div>SCHEDULE APPOINTMENT</div></div></div></div>	

Topic	Icon/Button	Description
SCHEDULE AN APPOINTMENT	<div><div>When would you like to meet with your planner? The first available date is selected.</div><div><div>April 2022</div><div><div>Su</div><div>Mo</div><div>Tu</div><div>We</div><div>Th</div><div>Fr</div><div>Sa</div><div>3</div><div>4</div><div>5</div><div>6</div><div>7</div><div>8</div><div>9</div><div>10</div><div>11</div><div>12</div><div>13</div><div>14</div><div>15</div><div>16</div><div>17</div><div>18</div><div>19</div><div>20</div><div>21</div><div>22</div><div>23</div><div>24</div><div>25</div><div>26</div><div>27</div><div>28</div><div>29</div><div>30</div></div></div><div><div>Available Time Slots</div><div><div>8:00 AM - 10:00 AM</div><div>10:00 AM - 12:00 PM</div><div>1:00 PM - 3:00 PM</div><div>FIRST AVAILABLE</div></div></div><div><div>Please describe the reason for your meeting request:</div><div><div>Reason for meeting:</div><div></div></div></div><div><div>Please select your preferred meeting location:</div><div><div>Preferred Location</div><div>Select</div></div></div><div><div>Note: Date, time, and meeting location requests are based on availability and require confirmation from the planner.</div><div><div>SUBMIT MEETING REQUEST</div></div></div></div>	Use the SCHEDULE AN APPOINTMENT screen to pick a day and time range, describe the reason for the appointment and specify the preferred location (on-site or off-site)
Submit the Meeting Request	<div><div>SUBMIT MEETING REQUEST</div></div>	