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 pending approval from American Water.		
Search		Click into the search field to enter agency details: keyword/#.
Status	Pending	Pending is the status of all submitted/ inbound registration requests.
Action Items	⋮	Click on either: • Approve/Reject • View Details
Approve/ Reject	Look-up Agency	Enter the Agency BP Number. Click **Search**. Click **Approve** or **Reject**.

Agencies > All Agencies Tab:

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

Quick Reference — Customer Portal

(User Guide page #s referenced below.)

Manage Users Tab:

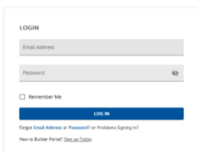
Topic	Icon	Description
Contains all approved Agency individual users. This page contains Agency users who are Active, Inactive, Invite Sent, or Locked.		
Add User	Add User	Invite an Agency portal user by completing the form including the role Viewer or Manager. Click **Invite.**
Search	🔍	Click into the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

Report Tab:

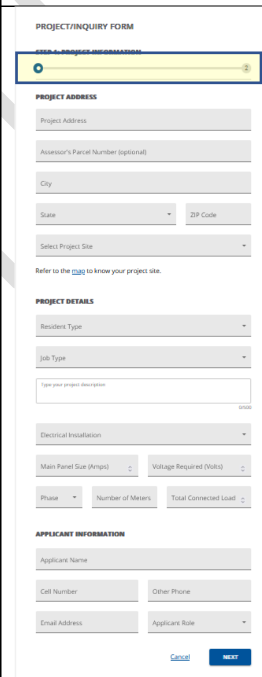
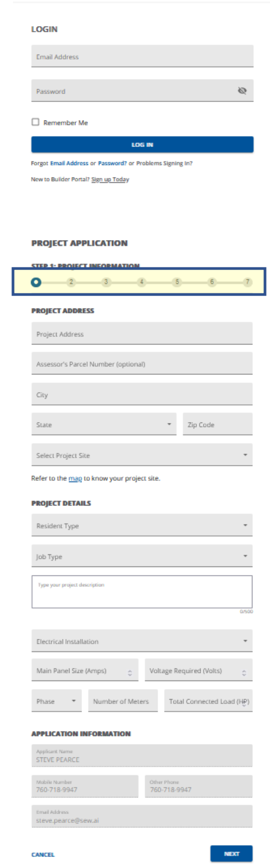
Topic	Icon	Instructions
Pledges Report	View pledge history on a table report.	
	Agency Name AW AGENCY	Use the Agency Name dropdown to select the agency.
	🔍	Search by Customer Name, Organization Name, Account Number. Date filter.
	Download Pledges	Download pledge history search results (to Excel).
Topic	**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	APPLY NOW	You must be **Logged In to Apply** and you must be **registered to Log In**.
Inquiry or Application	Inquiry / Application START INQUIRY Inquiry / Application START 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 **not necessary** to Log in or to have registered to submit an **Inquiry**. 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	NO LOGIN REQUIRED New Construction Resources Developer Contacts Energy Regulations Energy Rates Distributed Generation Interconnection	Pre-login Links on the Login page include: • New Construction Resources • Developer Contacts • Energy Regulations • Energy Rates • Distributed Generation Interconnection
Application Types	RESIDENTIAL Apply Now	Application specifically for this job type.
	COMMERCIAL Apply Now	Application specifically for this job type.
	AGRICULTURAL Apply Now	Application specifically for this job type.
Other Application Types	Industrial Services	Application specifically for this job type.
	Subdivision	Application specifically for this job type.
	Multi Family	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 #)

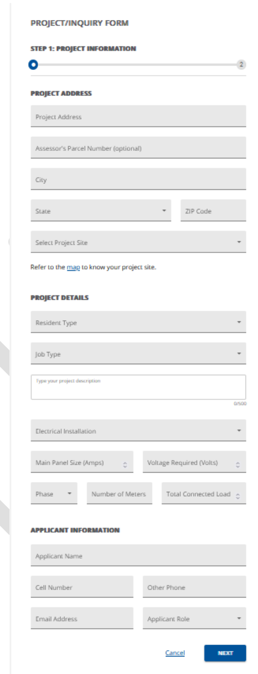
Topic	Icon/Button	Description
Inquiry or Application	Inquiry / Application START INQUIRY Inquiry / Application START APPLICATION	Will you be making an Inquiry as the first step to then later become an application or will you start the Application process directly? It is **not necessary** to Log in or to have registered to submit an **Inquiry**. You must have registered and Logged In to submit an application.
Inquiry	Inquiry / Application START INQUIRY There are generally only two steps to an Inquiry. Inquiries can be "promoted" to become an application by the Utility Admin	
Application	Inquiry / Application START APPLICATION 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.	

(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		INQUIRIES APPLICATIONS Choose Inquiries to see a current list of Open and Closed Inquiries. An Inquiry is automatically closed when "promoted" to Application status.
Applications		INQUIRIES APPLICATIONS Choose Applications to see a current list of Applications.
Inquiries List Filter	Filter the list of Inquiries based on the dropdown menus	Type: All; Status: All
	Type filter	Type All All Overhead Service Underground Service
	Status filter	Status All All Active Closed
Applications List Filter	Filter the list of Inquiries based on the dropdown menus	Type: All; Status: All; Phase: All
	Phase filter	Phase All All Application In Development Closed Out

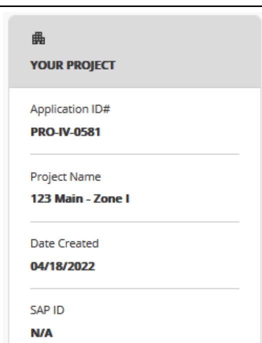
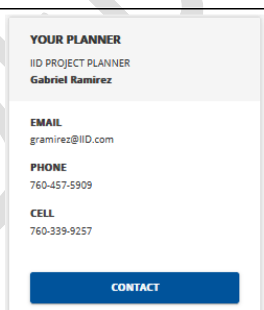
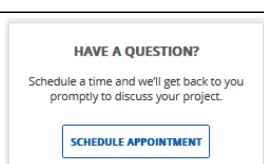
Application Management (pg #)

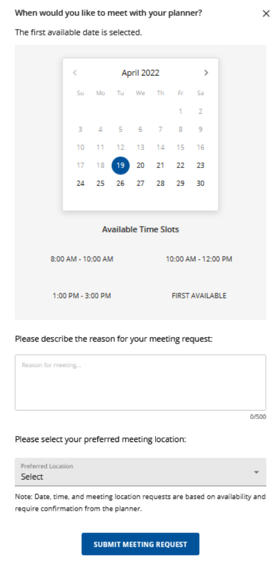
Topic	Icon/Button	Description
Search Field	Search by Inquiry #, Address, Planner, or Applican...	Search by Inquiry, Planner, or Application.
New Inquiry	+ NEW INQUIRY	Click to create a new Inquiry
	There are generally only two steps to an Inquiry. Inquiries can be "promoted" to become an application by the Utility Admin	
New Application	+ NEW APPLICATION	Click to create a new Application.
	PROJECT APPLICATION OVERVIEW	Project Application Overview will guide you through the **INITIATION, ENGINEERING, CONDUIT INSTALLATION, CONSTRUCTION, and INSPECTION** steps. There is also a list of, and links to, **Application Forms, Engineering Documents, Rights of Way and Easements** and information for **PV/DG Projects**. Before beginning the application, it is important to download the **Application Checklist** and the **Credit Establishment Requirements.**
	BEGIN APPLICATION	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	**INQ-IV-0579** Submitted: 04/18/2022 Applicant: Steve Pearce	Having already signed in, click on an Inquiry in the list.
Application	**123 Main - Zone I** Last update: 04/18/2022 Owner: STEVE PEARCE	Having already signed in, click on a Project in the list.
Application Details Page	Project List Project Details Documents Invoices	
	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		Application or Inquiry ID#, Applicant Name, Phase and Date Created
Your Planner		Your planner Name, Email, Phone, and Mobile Phone
HAVE A QUESTION		

Topic	Icon/Button	Description
SCHEDULE AN APPOINTMENT		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	**SUBMIT MEETING REQUEST**	