

Oracle Utilities Business Customer Engagement Cloud Service

Business Customer Engagement Proactive Alerts Configuration Guide



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Getting Started

This guide is used during the Oracle Utilities Opower launch process to provide product design information, collect utility configuration preferences for the products being launched, and track the finalization of these preferences. The preferences are then used to set up your Oracle Utilities Opower products and platform. This guide focuses on configuration options for the Oracle Utilities Opower Business Customer Engagement Proactive Alerts Cloud Service. See [Design and Configuration](#) for an overview of the process as well as links to feature-specific topics.

Note

This HTML documentation is for reference only. Your Delivery Team will give you a .pdf or .docx version of the document to capture your inputs. Once submitted to Oracle Utilities, all utility inputs recorded in the configuration guides are final and cannot be modified. Ensure that all configuration inputs are accurate before submitting them.

Product Overview

This guide covers the configuration for two products: Email High Bill Alerts and Weekly Energy Updates.

Email High Bill Alerts AMI are digital messages sent through the email channel to inform customers when they are on track for a high bill or high use for the current period. The alerts contain insights on how and when customers using energy, as well as actionable tips for customers to perform in order to lower their usage or bill before the period ends.

Weekly Energy Updates are email reports sent to business customers every week to inform them of their energy usage patterns, trends, and projected energy costs. With these emails, business customers can better understand how their actions correspond to their utility bills, get a preview of their bills, and get helpful insights on how to adjust their energy usage.

Disclaimer

Your utility might not have all of the products or features described in this document. [Contact Your Delivery Team](#) if you have any questions.

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Design and Configuration

This guide provides a summary of the available *configuration* options for the following Business Customer Engagement Proactive Alerts:

- [High Bill Alerts](#)
- [Weekly Energy Updates](#)

A *configuration* is a simple change that can be made with no coding required. There are required configurations and optional configurations. A customization is a change that requires more in-depth technical work, design, or coding to alter the appearance or behavior of the product, or to create something new within the product.

Customization options may be available for your program at cost as an Oracle Utilities Opower professional service offering. Ask your Delivery Team how customization options could enhance your program.

If an element is not listed as a configuration, you should assume that it cannot be configured and would require a customization. [Contact Your Delivery Team](#) if you have questions about this process or would like to make a customization request.

High Bill Alerts AMI

The Business Customer Engagement High Bill Alerts AMI are messages designed to help business AMI customers save energy and money when they are likely to use more than usual for a billing period. The alerts can be sent through email, text message, voice message, and mobile push channels.

In this section:

- [Email Alerts](#)

Email Alerts

Email High Bill Alerts AMI are digital messages sent through the email channel to inform customers when they are on track for a high bill or high use for the current period. The user experience can vary widely depending on many factors, such as which fuel/resource types the customer has, whether cost or usage is displayed, and whether the utility or the customer has set up a threshold.

On this page:

- Recommended module order
- Email-wide configuration options
- Module-specific configuration options
- Default text and options

Recommended Module Order

This table lists the recommended module order for several different types of Email High Bill Alerts AMI:

Type of Email	Suggested Order of Modules
Electric-Only	1. Subject Line 2. Header 3. Bill Forecast 4. Time of Day 5. Weather Insights 6. Ways To Save 7. Marketing Message (optional) 8. User Feedback (optional) 9. Footer
Gas-Only	1. Subject Line 2. Header 3. Bill Forecast 4. Time of Day 5. Weather Insights 6. Ways To Save 7. Marketing Message (optional) 8. User Feedback (optional) 9. Footer
Combined Electric and Gas	1. Subject Line 2. Header 3. Bill Forecast 4. Electric Gas Comparison 5. Time of Day 6. Weather Insights 7. Ways To Save 8. Marketing Message (optional) 9. User Feedback (optional) 10. Footer

Email-Wide Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

Configuration Options	Input Value
Color Palette	Oracle Utilities uses your organization's branding requirements to configure the colors used in the cloud service. You can specify your branding and color requirements in the Oracle Utilities Opower Platform Configuration Guide .
Fonts	Oracle Utilities recommends using the default fonts provided by the Business Customer Engagement Digital Self Service - Energy Management cloud service . Non-default fonts requested must meet all applicable font licensing requirements and support any required character sets. Licensing arrangements may require the utility to transfer font license ownership to Oracle Utilities.
Alert Delivery Window The delivery window refers to the days in the month during which High Bill Alerts (AMI) can be sent to customers. The default window for sending High Bill Alerts (AMI) is seven days after a new bill period starts and seven days before the bill period ends.	Optional Choose one of the following: • Use the default delivery window. • Use the following delivery window:
Additional Global Configurations	Review all additional configuration options provided in the Oracle Utilities Opower Platform Configuration Guide .

Module-Specific Configuration Options

See the topics below for module-specific configuration options:

- [Subject Line, Header, and Footer](#)
- [Bill Forecast](#)
- [Business Usage Disclaimer](#)
- [Electric Gas Comparison](#)
- [Time of Day](#)
- [Weather Insights](#)
- [Ways to Save](#)
- [Marketing Message](#)
- [User Feedback](#)
- [Alert Delivery](#)

Default Text and Options

Unless otherwise noted, Oracle Utilities recommends that you use the default text and options that are provided. These options have been chosen carefully by our copywriters and have been through user testing to maximize comprehension and effectiveness.

If you must configure an option to use something other than the default, be aware of the following:

- While you can configure the text that appears, you cannot change the logic behind the text.
- Using options and text other than the default could impact the effectiveness of your program.

Subject Line, Header and Footer

The subject line and the header are used to engage the business customer and brand the communication, while the footer provides necessary information and links to manage preferences or unsubscribe from the email channel.

Examples

This section shows examples of the subject line, header and footer.

Subject Line Example

The subject lines used in the Email High Bill Alert AMI deliver high-value information, and explain to the reader why they are receiving the alert. Note that the display of subject lines varies based on the device and email client used to view the message. The subject line can also vary depending on the customer's program design and preferred language.

Default Subject Line: The default subject line uses "on track" language and informs the customer that their usage or cost during the current bill period could result in a high bill. For example, "Alert: You are on track for a high bill of \$240".

Header Example

The header information includes a logo provided by the utility, and the customer's name and account number. Most of the numbers in the account number are displayed as asterisks for security purposes.

This image shows an example of the Header module:



Footer Example

The footer includes components that provide more context about the alert. These components include:

- An unsubscribe link
- A manage preferences link
- The utility's contact information
- An Oracle Utilities copyright statement
- A disclaimer statement (optional)

Typically the footer information is the same for all outbound communications a utility sends.

This image shows an example of the Footer module:

[Unsubscribe from these emails](#)
[Manage preferences](#)

Utility name, 1911 Fort Meyer Drive, Suite 702, Arlington, VA 22209

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Configuration Options

This section lists the configuration options for the subject lines, header, and footer modules.

Subject Line

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

Configuration Options	Input Value
Use On Track or Projected Bill Language The subject line can be configured to use "on track" language or "projected bill" language. Default: On track language	Optional Choose one of the following: - Use on track language. (Default) - Use projected bill language.

This table describes the default subject lines that are used for these emails:

Personal Threshold Setting	Rates Type	On Track Language	Projected Bill Language
Personal threshold not set or not available.	Cost	"You are on track for a high bill of <\$X>"	"Your upcoming bill is projected to be <\$X>"
Personal threshold set by customer.	Cost	"You are on track for a high bill of more than <\$X>"	"Your upcoming bill is projected to be higher than <cost threshold amount>"

Header

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

Configuration Options	Input Value
Logo The utility must provide a logo to include in the header of the email.	Required Provide the logo file to the delivery team.
Include URL in Logo The utility can provide a URL that can be included within the logo to direct customers to a utility website.	Optional Choose one of these options: - Do not include a URL. - Include the following URL:

Configuration Options	Input Value
Account Number Characters Masked The utility can specify how many characters of the customer's account number are displayed in the header. Note that this configuration is used for all Oracle Utilities outbound email communications that the utility sends, and should be set only once for all outbound communications. Default: Display the last four characters.	Required Choose one of the following: • Display the last four characters. (Default) • Display the following number of characters:
Include Premise Address The premise address can be enabled to appear after the account number for customers with one or more premises. Default: Do not display premise address.	Optional Choose one of the following: • Do not display premise address. (Default) • Display premise address.
Include Reference Number A reference number can be enabled to appear after the account number. Default: Do not display reference number.	Optional Choose one of the following: • Do not display reference number. (Default) • Display reference number.

Footer

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

Configuration Options	Input Value
Unsubscribe URL Utilities must provide the URL where customers are directed to if they want to unsubscribe from the emails.	Required Specify the URL:
Unsubscribe Link Text You can specify the text associated with the unsubscribe link. Default: Unsubscribe from these emails	Optional Choose one of the following: • Use the default text. • Use this text:
Utility Name and Address The utility's name and mailing address must appear due to CAN-SPAM regulations in the US and similar regulations abroad.	Required Specify the name and address to use in the email footer:
Legal Text This is the copyright and any other legal text required by the utility and/or Oracle Utilities.	Required Use the following legal text in the email footer:
Disclaimer Text This is any additional text required by the utility and/or Oracle Utilities. Disclaimer text appears below the copyright text. Adding a disclaimer is optional.	Optional Use the following disclaimer text in the email footer:

Bill Forecast

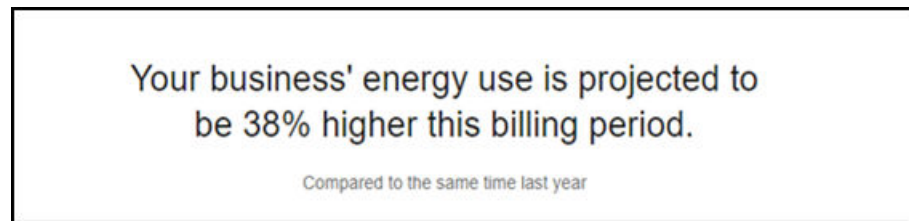
The Bill Forecast module provides a projection of how much the business customer could spend on their utility bill if they continue their spending behavior through the end of the billing

period. The module can also include personalized threshold information, and can enable customers to access and update their threshold.

If rates are not modeled, the email includes a usage forecast instead of a cost forecast. It is possible for some business customers at a utility to see cost information in their forecast, while others see usage information.

Example

This image shows an example of the Bill Forecast module:



Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

Configuration Options	Input Value
Rounding of Bill Forecast By default, the bill forecast rounds to the nearest whole dollar. The message can be configured to show two decimal places in the bill forecast. Default: Round to the nearest whole dollar.	Optional Choose one of these options: - Round to the nearest whole dollar. (Default) - Include 2 decimal places and do not round.
Bill Forecast Language The module can be configured to use on track or projected bill language, as follows: "You are on track for a high bill of more than \$ [XX]." "Your upcoming bill is projected to be higher than \$[XX]." Note that this language choice is also available in the Subject Lines module. The same language should be used for both modules. Default: On track language	Optional Choose one of these options: - Use on track language. (Default) - Use projected bill language.
Display Bill Period Date Range The billing period date range associated with the forecast can be set to display at the top of the Bill Forecast module. Default: Do not display.	Optional Choose one of these options: - Do not display date range. (Default) - Display date range.
Enable Range Specify whether the projected amount is displayed as a range rather than as a specific amount. Default: Display a single amount	Optional Choose one of these options: - Display single amount. (Default) - Display a range.

Configuration Options	Input Value
Turn Off Utility-Wide Threshold Utilities can turn off the utility-wide threshold. Default: Threshold is set to ON.	Optional Choose one of these options: - Threshold is on. (Default) - Threshold is off.
Utility-Wide Default Threshold Value If the utility-wide threshold is turned on, and a customer does not set a personalized threshold, they will only receive reports when their forecast exceeds the default threshold. Default: 30%	Optional Choose one of these options: - Use a 30% threshold. (Default) - Use this threshold value:

User Experience Variations

This section describes the user experience variations in the Bill Forecast module.

Personal Threshold Not Set

When the utility has a default utility-wide threshold, but the customer has not yet set up their own personal threshold, the bill forecast message changes to include a prominent button with the text "CHANGE YOUR THRESHOLD" to prompt users to set their own personal threshold.

Personal Threshold Not Available

If the utility does not implement the personal threshold, all language regarding the customer's personal threshold, and all links or buttons directing customers to set or change the threshold are removed from the message.

Usage

The message can provide a usage forecast rather than a forecasted amount. The usage forecast is shown as a percentage. For example, "Your energy use is projected to be 10% higher this billing period".

Projected Range

Utilities can display a forecast cost range rather than a specific cost value for the projected bill. If you choose to display a range, you do so by specify the range percentage. By default, the range is set to 0 (zero), and therefore, a range is not displayed. If you set the range to 15%, for example, and a customer's projected bill is \$100, the range would display as \$100-\$115.

Display Billing Period Date Range

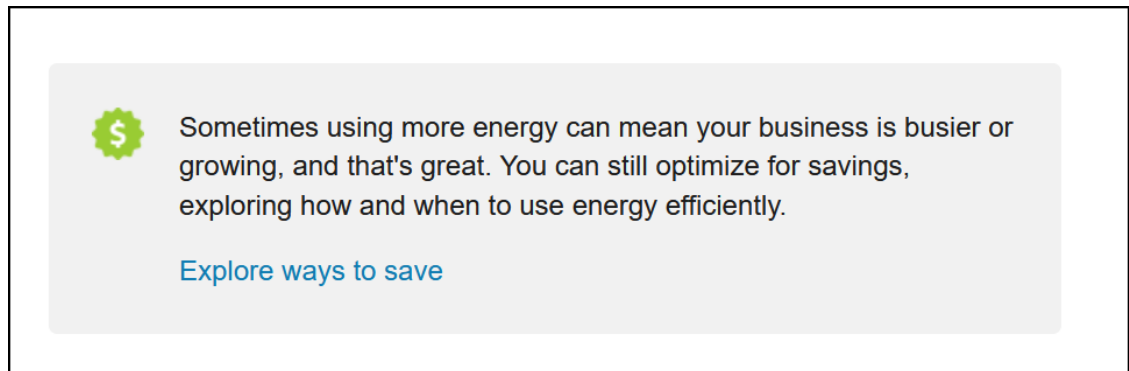
You can set the Bill Forecast module to display the bill period date range associated with the forecast. The date range appears at the top of the module when set to display. By default, the date range is not displayed.

Business Usage Disclaimer

The Business Usage Disclaimer module is a brief message stating that increased energy use might mean that a business is growing. It can appear below the [Bill Forecast](#) module as a way to reassure business customers that increased energy usage is not necessarily a negative trend, and that there are ways to save energy even when business is busier than usual.

Example

This image shows an example of the Business Usage Disclaimer module:



Configuration Options

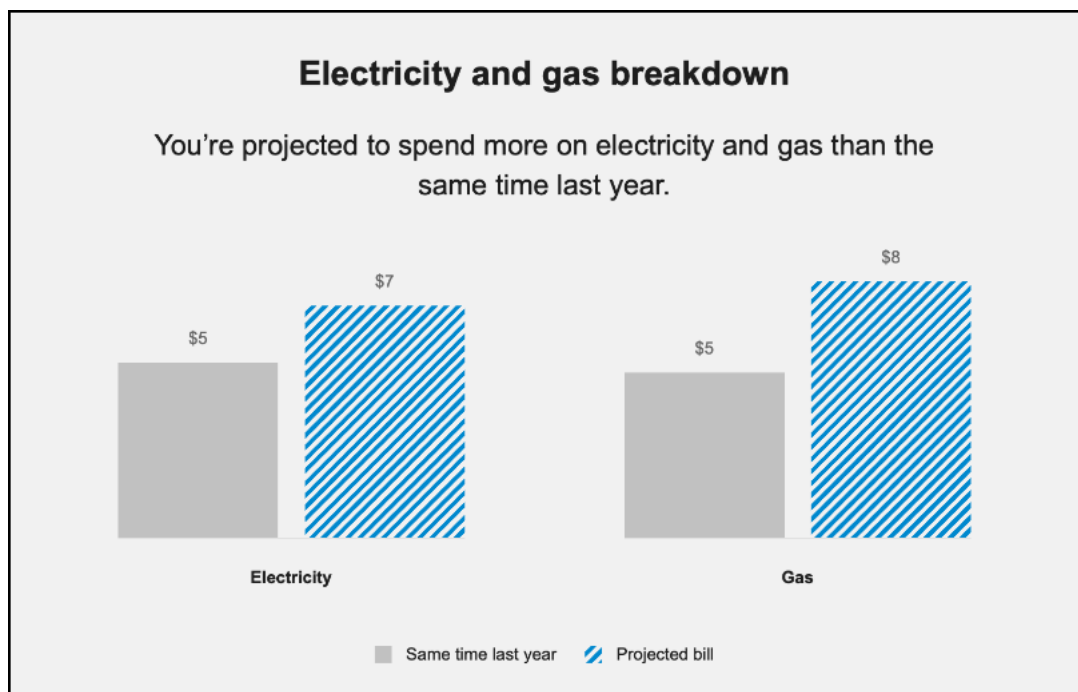
There are no configuration options for this module.

Electric Gas Comparison

The Electric Gas Comparison module is included in the Email High Bill Alert AMI for business customers who have both gas and electric service.

Example

This image shows an example of the Electric Gas Comparison module:



Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

Configuration Options	Input Value
Heading You can update the heading of the module. Default: "Electric and gas breakdown".	Optional Choose one of the following: - Use the "Electric and gas breakdown" heading. (Default) - Use the following heading:
Subheading You can configure the subheading in the module as necessary. Default: "You're projected to spend <more/less> on <fuel/resource> than the same time last year." For example, "You're projected to spend more on electricity and gas than the same time last year."	Optional Choose one of the following: - Use the default subheading. - Use the following heading:
Bar Chart Labels The labels below the bars in the chart can be updated. Defaults: - Electricity - Gas	Optional Choose one of the following: - Use the default labels. - Use the following labels:
Decimal Places You can configure the module to display up to two decimal places for the amounts above the bars. Default: Display zero decimal places.	Optional Choose one of the following: - Display zero decimal places. (Default) - Display this many decimal places:
Legend Labels The legend labels below the chart can be updated. Defaults: - Projected bill - Same time last year	Optional Choose one of the following: - Use the default labels. - Use the following labels:

User Experience Variations

This section describes the user experience variations in the Electric and Gas Comparison module.

Usage

If the customer receives a usage version of the email, this module shows usage instead of costs. Electricity is displayed in kWh, and gas is displayed in therms.

Subheading

The subheader changes based on whether a customer spends more or less than they did during the same period last year. The customer must have spent at least 10% more than the previous year to be considered "spending more" during the current bill period. This 10% threshold for the comparison states is not configurable. These subheader variations are possible:

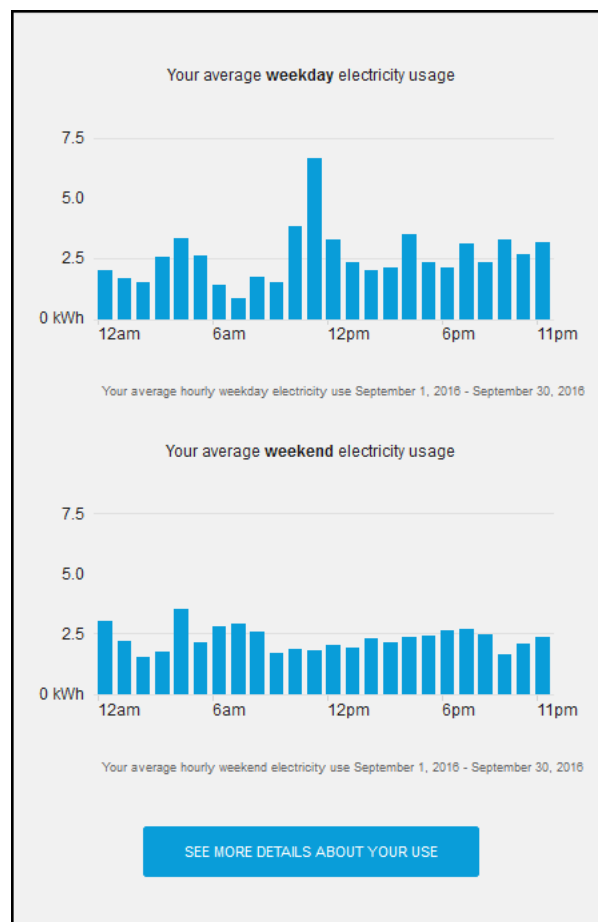
- **Customers spends 10% more on both fuel types:** "You're projected to spend more on electricity and gas than the same time last year."
- **Customer spends 10% more on one fuel type, but not the other:** "You're projected to spend more on <fuel type> than the same time last year."
- **Customer spends less:** "You're projected to spend less on electricity and gas than the same time last year." Note that this occurs only when the customer's bill forecast exceeds their personal cost threshold, even though they did not spend more.
- **Customer spends about the same:** "You're projected to spend about the same on electricity and gas than the same time last year." Note that this occurs only when the customer's bill forecast exceeds their personal cost threshold, even though they did not spend more.

Time of Day

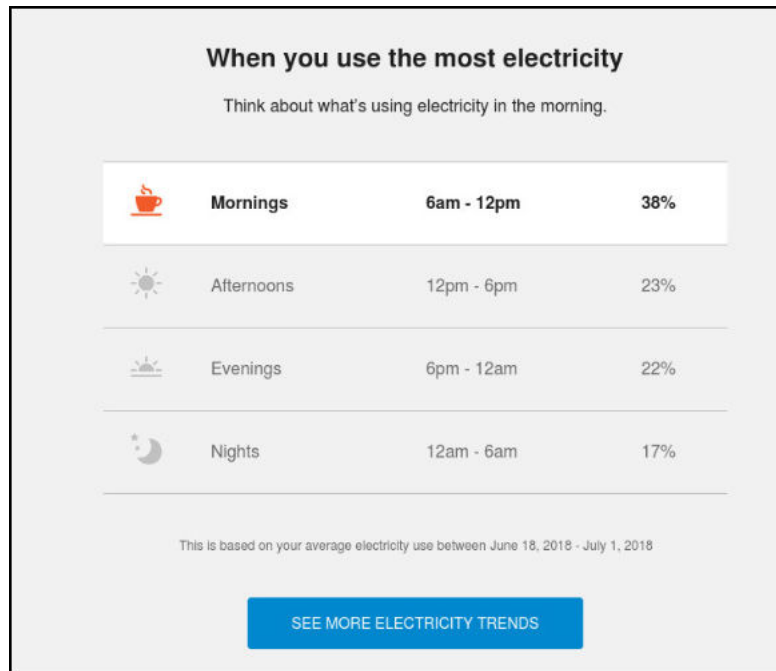
The Time of Day module identifies the time of day when business customers tend to use the most energy so that they know when to focus on being more energy-efficient. The energy usage is displayed in two bar charts: one for average weekday usage and one for average weekend usage. The usage value represents usage-to-date within the current bill period.

Example

This image shows an example of the Time of Day module:



Depending on each utility's setup and configuration, an older version of the Time of Day module may be shown. The usage is categorized in mornings, afternoons, evenings or nights, and the usage is expressed as a percentage, so that the customer knows when to focus on being more energy-efficient. The six-hour time period with the most usage is highlighted, while the other three time periods display in a faded color.



Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

Note: The options below are for the version of the Time of Day module that shows bar charts for weekday and weekend usage.

Configuration Options	Input Value
Chart Headings The chart headings of the module are editable. Default: "You average weekday <fuel type> usage" "Your average weekend <fuel type> usage"	Optional Choose one of the following: - Use the defaults (recommended). - Use the following heading:
Chart Footers The chart footers of the module are editable. Default: "Your average hourly weekday <fuel type> use <Month Day, Year> - <Month Day, Year>" "Your average hourly weekend <fuel type> use <Month Day, Year> - <Month Day, Year>"	Optional Choose one of the following: - Use the defaults (recommended). - Use the following heading:

Configuration Options	Input Value
See More Fuel Trends Button You can update the text on this button, as well as the URL to which the customer is directed when clicking the button. Default: "See More Details About Your Usage" You must also specify the URL the customer should link to when clicking the button. By default, it is configured to link to the Data Browser .	Required Choose one of the following: • Use the default button text (recommended). • Use the following button text: • Use this URL:

User Experience Variations

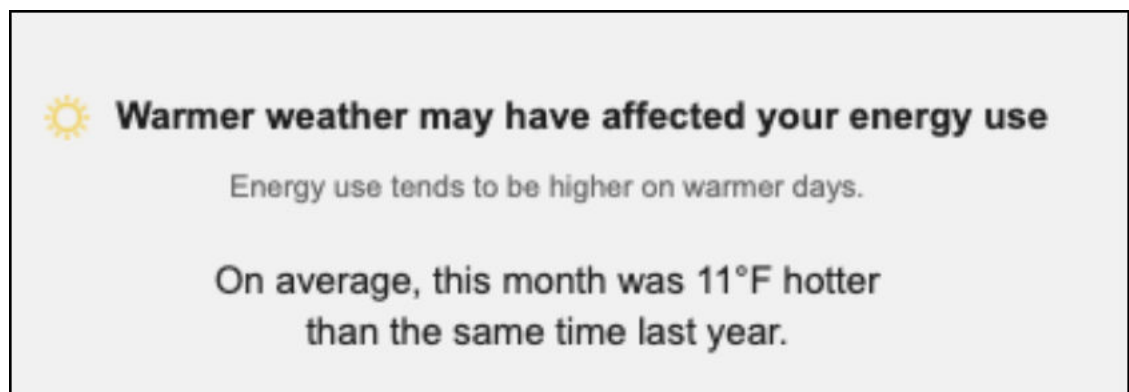
The user experience of the feature may vary for customers and utilities depending upon their service types (gas, electricity, dual fuel, and so on), available data, costs, locale, and other factors.

Weather Insights

The Weather Insight module educates business customers on how changes in temperature can affect their energy use. It also provides a comparison between the current month's average temperature and the average temperature from the same month of the previous year. For example, "On average, this month was 13°F hotter than the same time last year."

Example

This image shows an example of the Weather Insights module:



Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

Configuration Options	Input Value
Heading The default heading of the module varies depending on the state. These are the default headings by state: • Cooler: Colder weather may have affected your energy use • Warmer: Warmer weather may have affected your energy use • Neutral: What caused your bill to change?	Optional Choose one of the following: • Use the default headings. • Use the following headings:
Subheading The default subheading of the module varies depending on the state. These are the default headings by state: • Cooler: Energy use tends to be higher on colder days. • Warmer: Energy use tends to be higher on warmer days. • Neutral: The weather has been similar to this time last year, and may not have affected your bill.	Optional Choose one of the following: • Use the default subheadings. • Use the following subheadings:
Weather Insight Statement The default weather insight statement varies depending on the state. These are the default headings by state: • Cooler: On average, this month was <temp> cooler than the same time last year. • Warmer: On average this month was <temp> hotter than the same time last year. • Neutral: Factors like heavy appliance use or household guests may have contributed.	Optional Choose one of the following: • Display zero decimal places. (Default) • Display this many decimal places:
Fahrenheit or Celsius The weather insight temperature can be measured in degrees Fahrenheit or Celsius. Default: Fahrenheit	Optional Choose one of the following: • Display degrees in Fahrenheit. (Default) • Display degrees in Celsius.

User Experience Variations

This module can vary depending on how the temperature in the current period compares to the temperature in the comparison period from the previous year.

The weather insights calculation determines whether the average temperature was higher or lower between the current period and the comparison period. The calculator generates a weather insight that describes how weather might have impacted the bill's charges, and can result in the use of one of these states:

- Cooler
- Warmer
- Neutral

This section discusses how weather information is calculated to determine the module state.

Weather Data Collection

Weather information is collected for the following intervals:

- **Current billing period:** An uncompleted bill interval. The bill interval end date can be shifted up to 2 days and 4 hours due to a weather service latency (4 hours).
- **Last year's billing period:** 1 year shifted from the current billing period.
- **Current season period:** Last 30 days interval.
- **Last year's season period:** 1 year shifted from the current season period.

We classify each of the above periods into seasons: Heating, Cooling or Transition. The classification is made using average mean temperature.

Determine Whether Seasons are Comparable

Once the season classifications are calculated, we determine if the seasons are comparable. A comparable season is defined by two periods being either the same season or one period being defined as Transition.

To be comparable the following checks are made:

- current billing period and current season period (for example both must be "Heating", or both must be "Cooling", or one could be "Transition")
- current billing period and previous billing period
- current season period and previous season period

If one or more of the checks return a negative result, the seasons are not considered comparable. In this case, the module will not render in the communication.

Identifying the Weather Insight States

If the seasons are determined to be comparable, then the weather insight states are determined by the season classification and temperature difference calculations listed here:

- **Warmer:** If current billing period is classified as Cooling, the mean temperature difference between current bill period and previous bill period is positive, and the mean temperature difference is greater than 8°F.
 - **Note:** For GAS service points, if any of the billing periods or season periods are classified as Cooling then the module will not render in the communication. This is because customers would not expect to use GAS during a Cooling season.
- **Cooler:** If current billing period is classified as Heating, the mean temperature difference between current bill period and previous bill period is negative, and the absolute mean temperature difference is greater than 8°F.
- **Neutral:** If neither of the above criteria are met.

Ways to Save

The Ways to Save module provides energy-saving advice to help business customers lower their bill before the end of the billing period. The module displays a single tip that is quick and easy to read. Business customers can click **See More Ways to Save** to view more detailed tip information in the [Business Customer Engagement Digital Self Service - Energy Management](#) web portal.

Configuration Options

Configuration of tips varies for each tip. [Contact your Delivery Team](#) to discuss options for configuring tip content.

Marketing Message

A marketing message can appear in the High Bill Alert AMI to promote a utility product or program, such as redirecting customers to the Business Customer Engagement Digital Self-Service Web Portal or advertising a utility-specific rebate or discount. Typically it is placed above the [User Feedback](#) module or the [Footer](#).

For details about adding marketing modules to your High Bill Alert AMI email communication, [Contact Your Delivery Team](#).

Configuration Options

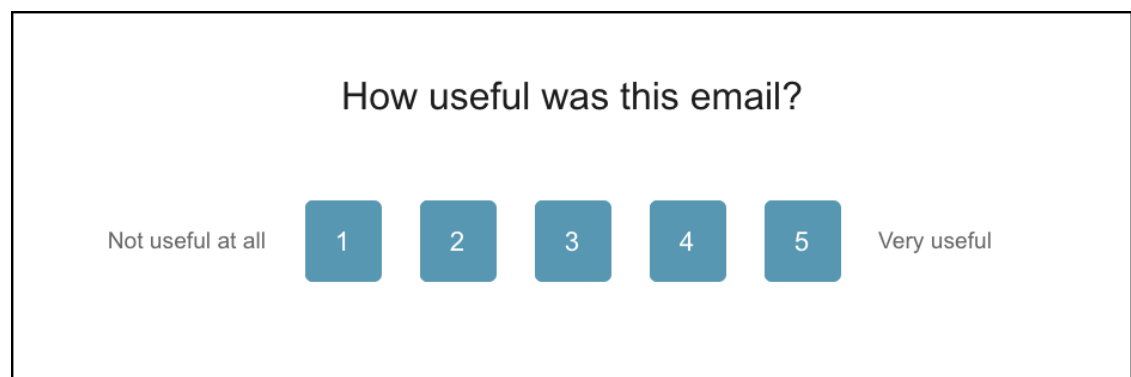
The content within marketing messages is customizable in coordination with Oracle Utilities Opower. Depending on the purpose of the module, you may be required to provide additional inputs. [Contact Your Delivery Team](#) about selecting and configuring marketing message modules that support the High Bill Alert AMI program experience.

User Feedback

The User Feedback module can be included at the end of the High Bill Alert AMI email to solicit feedback on how useful this email is to customers. Customers can indicate their response on a scale from 1 to 5. After submitting their feedback, customers are directed to a confirmation page and thanked for their input.

Example

This image shows an example of the User Feedback module:



How useful was this email?

Not useful at all 1 2 3 4 5 Very useful

Configuration Options

There are no configuration options for this module.

Delivery

Email, text, and voice alerts are delivered according to specific rules and within a particular delivery window.

Waking Hours: High Bill Alerts AMI are delivered during waking hours in a utility-specific delivery window.

Days of the Week: High Bill Alerts AMI are delivered on weekdays and weekends during waking hours.

Non-Delivery Window: Alerts cannot be sent during a default non-delivery window. Specifically, alerts cannot be sent within seven days after a new bill period starts, or within seven days before the bill period ends. The purpose of the non-delivery window is to ensure customers do not receive an alert too soon after their bill period starts or too late in the bill period to be useful.

For example, consider a customer who gets billed on the third day of every month. Also, consider that it is now June 3rd and that the customer's next bill is July 3rd. With the default delivery settings, Oracle Utilities could send an alert anytime between June 10th (seven days after the bill period starts) and June 26th (seven days before the bill period ends).

Utilities can coordinate with Oracle Utilities to configure the default non-delivery window settings.

Delivery Tools: Oracle Utilities uses third-party tools to send High Bill Alerts AMI. Most of these tools provide Oracle Utilities with information on bounces, opens, opt-outs, and click-throughs.

Emails and Attachments: For email alerts, the email content is delivered directly in the email message with no attachments. This makes it more convenient for customers to quickly view the information, and it makes the emails less likely to be blocked by spam filters.

Weekly Energy Updates

Weekly Energy Updates are email reports sent to business customers every week to inform them of their energy usage patterns, trends, and projected energy costs. With these emails, business customers can better understand how their actions correspond to their utility bills, get a preview of their bills, and get helpful insights on how to adjust their energy usage.

In this section:

- Report types
- Email-wide configuration options
- Module-specific configuration options
- Default text and options

Report Types

Customers can receive different types of Weekly Energy Update emails, each with different sets of information and data-driven insights. See [Report Types](#) for more information, including screenshots and the default modules.

Email-Wide Configuration Options

The configurations below apply to the whole email. For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

Configuration Options	Input Value
Color Palette	Oracle Utilities uses your organization's branding requirements to configure the colors used in the cloud service. You can specify your branding and color requirements in the Oracle Utilities Opower Platform Configuration Guide .
Fonts	Oracle Utilities recommends using the default fonts provided by the Business Customer Engagement Digital Self Service - Energy Management cloud service. Non-default fonts requested must meet all applicable font licensing requirements and support any required character sets. Licensing arrangements may require the utility to transfer font license ownership to Oracle Utilities.
Alert Delivery Window The delivery window refers to the days in the month during which High Bill Alerts (AMI) can be sent to customers. The default window for sending High Bill Alerts (AMI) is seven days after a new bill period starts and seven days before the bill period ends.	Optional Choose one of the following: • Use the default delivery window. • Use the following delivery window:
Additional Global Configurations	Review all additional configuration options provided in the Oracle Utilities Opower Platform Configuration Guide .

Module-Specific Configuration Options

See the topics below for module-specific configuration options.

- [Report Types](#)
- [Subject Line, Header, and Footer](#)
- [Introduction](#)
- [Welcome](#)
- [Weekly Comparison](#)
- [Cost Tracker](#)
- [Business Usage Disclaimer](#)
- [Bill Forecast](#)
- [Day by Day and Hourly Breakdowns](#)
- [Personalized Tips](#)
- [Business Profile](#)
- [Marketing Message](#)
- [User Feedback](#)

Default Text and Options

Unless otherwise noted, Oracle Utilities recommends that you use the default text and options that are provided. These options have been chosen carefully by our copywriters and have been through user testing to maximize comprehension and effectiveness.

If you must configure an option to use something other than the default, be aware of the following:

- While you can configure the text that appears, you cannot change the logic behind the text.
- Using options and text other than the default could impact the effectiveness of your program.

Report Types

Business customers can receive different types of Weekly Energy Update emails, each of which have slightly different messaging and data insights to motivate business customers in different ways. Report types include:

- Standard Weekly Energy Update Emails
- Cost Tracker Report Emails

Standard Weekly Energy Update Emails

Standard Weekly Energy Updates are the original and most common email reports sent to customers every week. These emails are made up of individual modules which inform business customers of their energy usage patterns, trends, and projected energy usage or costs. The following list includes the recommended modules, in the recommended order:

- [Subject Line and Header](#)
- [Introduction](#)
- [Welcome](#) (only used in the first email sent to the business customer)
- [Weekly Comparison](#)
- [Business Usage Disclaimer](#)
- [Bill Forecast](#)
- [Day-by-Day and Hourly Breakdown](#)
- [Personalized Tips](#)
- [Business Profile](#)
- [User Feedback](#)
- [Footer](#)

The following standard Weekly Energy Update report types are supported:

- **Single Fuel Electric:** Weekly Energy Updates for customers who only have electricity. The energy units are displayed as kilowatt-hours (kWh).
- **Single Fuel Natural Gas:** Weekly Energy Updates for customers who only have natural gas. The energy units are displayed as therms, CCF, or m3.
- **Dual Fuel - Electric and Natural Gas:** Weekly Energy Updates for customers who have both electricity and natural gas. Electric use is displayed as kWh and gas use is displayed as therms, CCF, or m3.

The image below shows an example of what the email might look like for a business customer.

UtilityCoAccount #*****7890
4543 138th St.
Los Angeles, CA 90210

Taylor,
Here's your weekly business electricity
update for **July 17-23, 2024**

Taylor Edward Hopper Car Detailing



Why am I receiving this?

This is not a bill. These weekly emails help you save energy, which can lower your bill and help us deliver cleaner, more reliable energy to everyone.

Here's what to expect:

1

Energy use insights *every week*

You can learn about your energy use over time and see trends.

2

Personalized ways to save

You'll get helpful tips chosen specifically for your business.

You used **33% more** electricity
this week

Cost Tracker Report Emails

Business customers can be selected to receive Cost Tracker emails as a replacement for the standard Weekly Energy Updates email. Cost Tracker Weekly Energy Updates are made up of individual modules which focus on the business customer's cost status so far in the billing period. The following list includes the recommended modules, in the recommended order:

- [Subject Line and Header](#)
- [Introduction](#)
- [Welcome](#) (only used in the first email sent to the business customer)
- [Cost Tracker](#)
- [Day-by-Day and Hourly Breakdown](#)
- [Personalized Tips](#)
- [Business Profile](#)
- [User Feedback](#)
- [Footer](#)

The image below shows an example of an electricity Cost Tracker Report email type.

UtilityCoAccount #*****7890
4543 138th St.
Los Angeles, CA 90210

Taylor,
Here's your weekly business electricity
update for **July 16-22, 2024**

Taylor Edward Hopper Car Detailing



Why am I receiving this?

This is not a bill! These weekly emails help you save energy, which can lower your bill and help us deliver cleaner, more reliable energy to everyone.

Here's what to expect:

1

Energy use insights *every week*

You can learn about your energy use over time and see trends.

2

Personalized ways to save

You'll get helpful tips chosen specifically for your business.

Subject Line, Header and Footer

The Weekly Energy Update subject line and header are used to engage the business customer and brand the communication, while the footer provides necessary information and links to manage preferences or unsubscribe from the email channel.

Examples

This section provides examples for the subject line, header, and footer components of the Weekly Energy Update email.

Subject Line Example

The Weekly Energy Update subject line indicates that the email contains an update about the customer's energy use. The subject line varies based on [report type](#) and fuel type. Some examples include:

- "Weekly electricity update: You used X% more electricity"
- "Weekly energy update: You used less X% electricity and Y% less gas"

Header Example

The Weekly Energy Update header includes the utility's logo, business customer's account number (with only the last four digits displayed), and business address. The image below shows an example of the Header module's design for electricity customers.



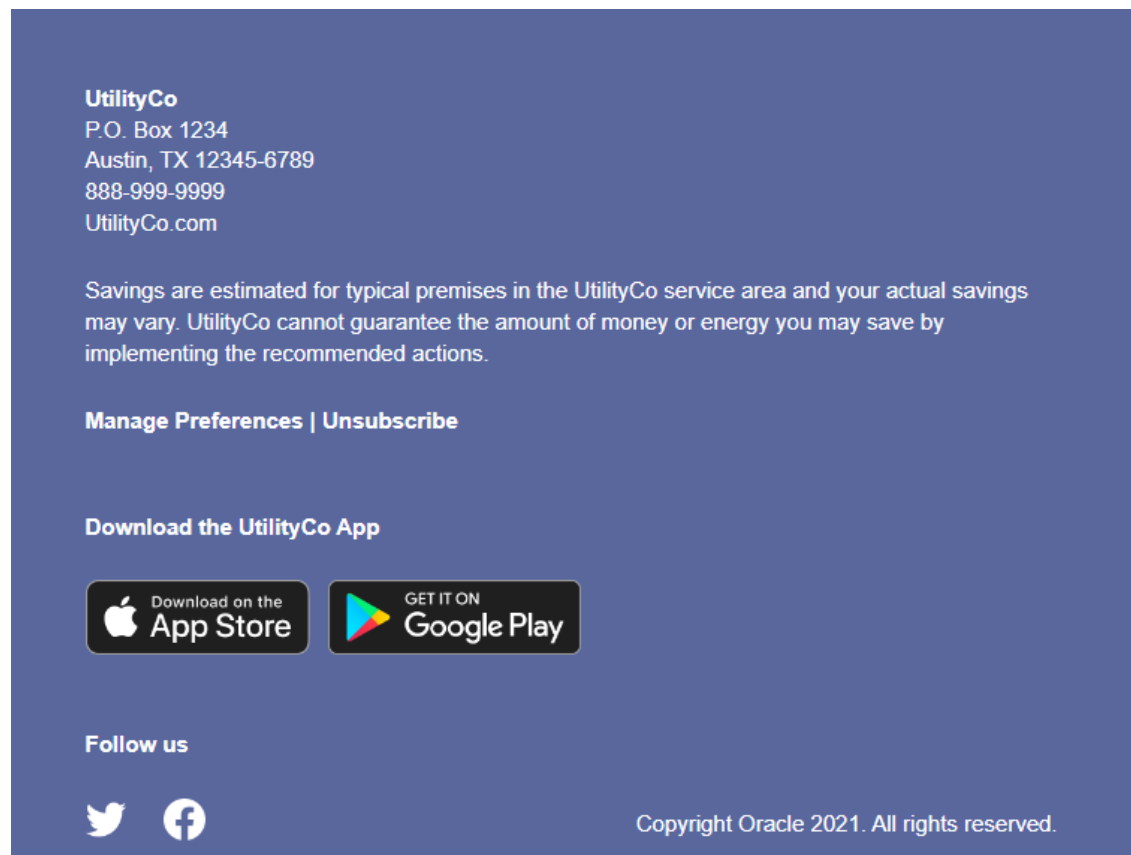
Footer Example

The footer includes components that provide more context about the alert. These components include:

- An unsubscribe link
- A manage preferences link
- The utility's contact information
- An Oracle Utilities copyright statement
- A disclaimer statement (optional)

Typically, the footer information is the same for all outbound communications a utility sends.

The image below is an example of the Footer module.



Configuration Options

This section lists the configuration options for the subject lines, header, and footer modules.

Subject Line

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

Configuration Option	Input Value
Email Subject Line (not depicted) Specify the default email subject line to use. Oracle Utilities Opower recommends using the default subject lines, as research has shown that they drive the most customer engagement. Default: Varies by fuel type, amount used, and other factors. See User Experience Variations below for details.	Required Choose one of the following: - Use the default subject lines. - Work with your Delivery Team to determine the best approach.
"From" Name (not depicted) The name that appears in the "From" line in all email communications can be altered. Default: The utility name is used as the "From" name.	Optional Indicate the desired "From" name in the Oracle Utilities Opower Platform Configuration Guide .

Configuration Option	Input Value
"From" Address (not depicted) The "From" email address that will appear as the sender for the email communication. Default: The utility must provide a "From" email address.	Required Indicate the desired "From" address in the Oracle Utilities Opower Platform Configuration Guide .
"Reply To" Address (not depicted) The email address that will be populated when a customer replies to the communication. Default: The utility email address specified for the "From" is reused as the Reply To address.	Optional Indicate the desired "Reply To" address in the Oracle Utilities Opower Platform Configuration Guide .

Header

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

Configuration Option	Input Value
Utility Logo The RGB and CMYK versions of the utility logo as .ai files. Example: UtilityCo_Logo_RGB.ai	Required Provide the utility logo in the Oracle Utilities Opower Platform Configuration Guide .
Utility Logo URL The URL can be configured to point to a utility-specific web page. Default: Do not use a URL.	Optional Choose one of the following: - Do not use a URL. - Use the following URL:
Account Number Format An example of how the customer account number is formatted on the bill. In your example, indicate how many digits should be displayed (in the example below, four digits are displayed). Default: ****1234	Required Provide the account number format in the Oracle Utilities Opower Platform Configuration Guide .

Footer

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

Configuration Option	Input Value
Manage Preference A link to a web page where a customer can edit their communication preferences. Default: If your program includes a standalone version of the Business Customer Engagement Digital Self-Service Web Portal, then by default the link points to the Account Center page that comes with the product. If your program includes embedded web widgets, then by default the link points to the Digital Self Service Account Center widget.	Required Choose one of the following: - Use the default Manage Preferences link. - Do not include a Manage Preferences link. - Work with your Delivery Team to use a different link.

Configuration Option	Input Value
Utility Name and Address The utility's name and mailing address must appear due to CAN-SPAM regulations in the US and similar regulations abroad.	Required Specify the name and address to use in the email footer:
Legal Text This is the copyright and any other legal text required by the utility and/or Oracle Utilities.	Required Use the following legal text:
Disclaimer Text This is any additional text required by the utility and/or Oracle Utilities. Disclaimer text appears below the copyright text. Adding a disclaimer is optional.	Optional Use the following disclaimer text in the email footer:

User Experience Variations

The user experience varies for customers depending upon their service types, available data, costs, and locale. Note that the following list indicates the primary user experience variations, not all possible variations.

Subject Line Variations

Single Fuel Electric: The single fuel electric subject line varies depending on whether the customer *used* more, less, or about the same amount of electricity as the previous week. If rates are modeled, then the subject line focuses on how the customer *spent* more, less, or about the same amount of money on electricity as the previous week. The following examples show the electricity usage variations.

- "Weekly electricity update: You used X% more electricity"
- "Weekly electricity update: You used X% less electricity"
- "Weekly electricity update: Your electricity usage was about the same"

Single Fuel Natural Gas: The single fuel gas subject line varies depending on whether the customer *used* more, less, or about the same amount of gas as the previous week. If rates are modeled, then the subject line focuses on how the customer *spent* more, less, or about the same amount of money on gas as the previous week. The following examples show the gas usage variations.

- "Weekly gas update: You used X% more gas"
- "Weekly gas update: You used X% less gas"
- "Weekly gas update: Your gas usage was about the same"

Dual Fuel - Electric and Natural Gas: The dual fuel subject line varies depending on whether the customer *used* more, less, or about the same amount of gas and electricity as the previous week. If rates are modeled, then the subject line focuses on how the customer *spent* more, less, or about the same amount of money on gas and electricity as the previous week. The following examples show a few of the possible electricity and gas usage variations.

- "Weekly energy update: You used less X% electricity and Y% less gas"
- "Weekly energy update: You used X% less electricity and Y% more gas"
- "Weekly energy update: Your electricity and gas usage were about the same"

Email Spans Multiple Months: If the date range spans multiple months, then the month names are abbreviated to reduce the number of characters in the subject line. The format for the subject line in this situation is, "Your weekly energy breakdown for <month1 date1-month2 date2, year>: <Insight statement>".

- Example: "Your weekly energy breakdown for Feb 29-Mar 6, 2020: You used X% more electricity"

Email Spans Two Years: If the date range spans multiple years, then the first year is omitted and month names are abbreviated. The format for the subject line in this situation is, "Your weekly energy breakdown for <month date1-month2 date2, year2>: <Insight statement>".

- Example: "Your weekly energy breakdown for Dec 31-Jan 6, 2020: You used X% more electricity"

Email Title Variations

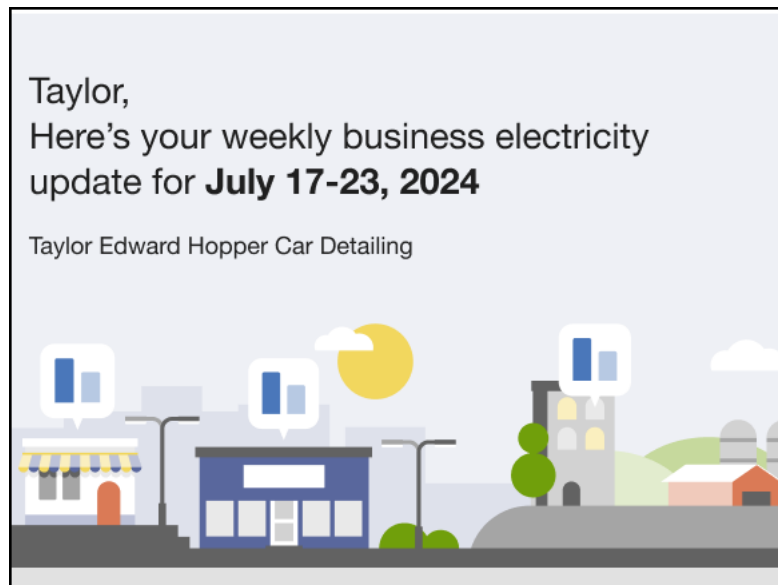
- **Single Fuel Electric:** "Your weekly electricity update"
- **Single Fuel Natural Gas:** "Your weekly gas update"
- **Dual Fuel - Electric and Natural Gas:** "Your weekly energy update"

Introduction

The Introduction module displays a message and a graphic to the recipient of the Weekly Energy Update. It includes the business name, title of the email, date range, and full business name (if available). The message varies slightly depending on the customer's fuel type.

Example

The image below is an example of the Introduction module for business customers.



Configuration Options

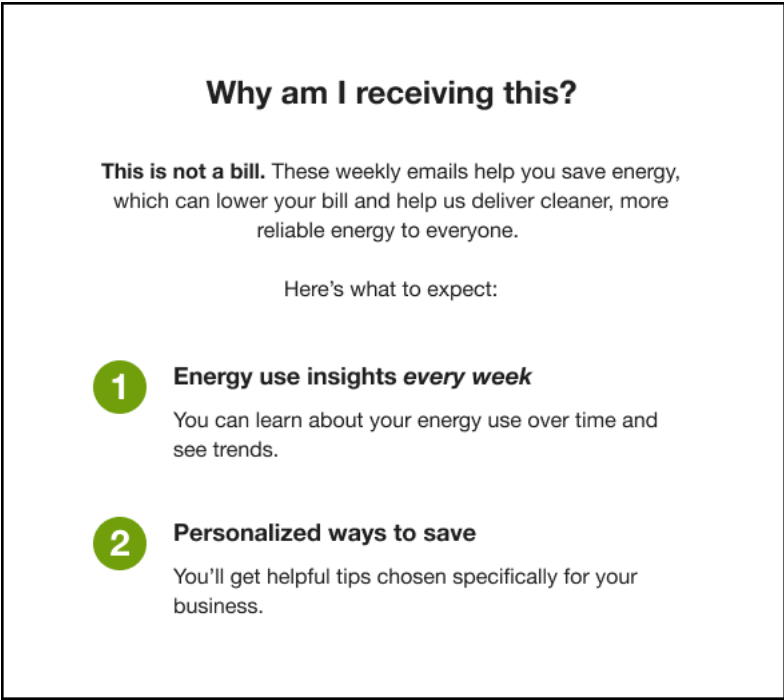
There are no configuration options for this module.

Welcome

The Welcome module is a one-time-delivery message that explains to the business customer the purpose of the Weekly Energy Update. It emphasizes that the email is not a bill and that the purpose is to help business customers lower their energy use and save money on their energy costs.

Example

The image below is an example of the Welcome module for business customers.



Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

Configuration Option	Input Value
Heading The heading draws the customer's attention to the purpose of the communication. Default: "Why am I receiving this?"	Optional Choose one of the following: • Use the default. • Work with your Delivery Team to modify the heading.

Configuration Option	Input Value
Welcome Introduction The welcome introduction summarizes the purpose and benefits of the communication. Default: "This is not a bill! These weekly emails help you save energy, which can lower your bill and help us deliver clear, more reliable energy to everyone. Here's what to expect:"	Optional Choose one of the following: • Use the default. • Work with your Delivery Team to modify the text.
Welcome Highlights The welcome highlights explain how the communication will help business customers save energy and money. Default: The default text describes how the email provides energy use insights and personalized ways to save. The screenshot above contains an example of how the default text might look.	Optional Choose one of the following: • Use the default. • Work with your Delivery Team to modify the text.

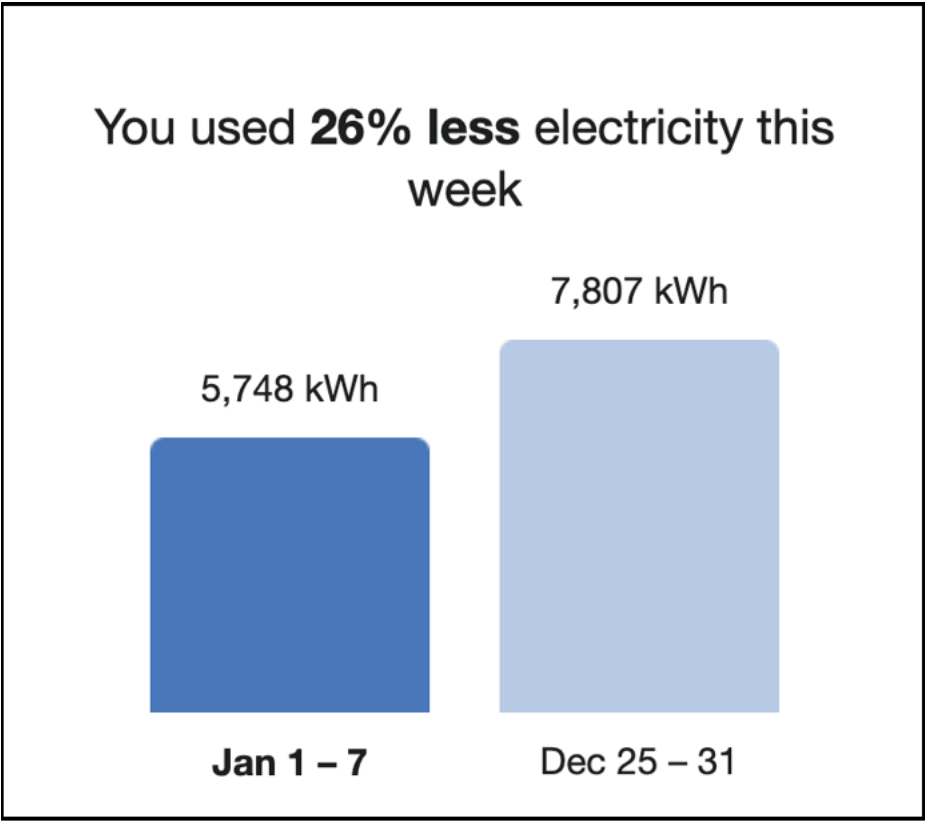
Weekly Comparison

The Weekly Comparison module shows a week-over-week comparison of a business customer's weekly electric or gas usage. If the customer is dual fuel, the module includes graphs for both electric and gas use. If the customer is eligible to receive cost information, a cost comparison is shown instead of a usage comparison.

Note: The Weekly Comparison module is not included in [Cost Tracker Report](#) emails.

Example

The image below is an example of the Weekly Comparison module for electricity customers.



Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

Configuration Option	Input Value
Bar Colors Colors in the graph can match the utility's color palette. Default: The colors in the example represent the default colors.	Required Choose one of the following: • Use the default colors. • Work with your Delivery Team to specify other colors.
Display Cost Information (not depicted) If a customer's rates are modeled, the cost per day can be displayed in the graph. Default: Display cost information if it is available.	Optional Choose one of the following if cost information is available: • Use the default (display the cost information). • Hide the cost information and display usage information instead.

Configuration Option	Input Value
Comparison Range (not depicted) The comparison range determines whether the customer's energy use for the current week falls within the "neutral" state. The neutral state, which provides the message, "You used about the same..." occurs if this week's usage or cost is within +/- <i>n</i> of the specified range. The range is configurable, and can be stated as a percentage. Default: The default is +/- 1% for both usage and cost.	Required Use the following range:

User Experience Variations

The user experience varies for customers depending upon their service types, available data, costs, and locale. Note that the following list indicates the primary user experience variations, not all possible variations.

Gas-Only

For gas-only customers, the electricity unit "kWh" is replaced by "therms" or "CCFs" (whichever unit of measure is appropriate for the utility), and the word "electricity" is replaced by "gas".

Dual Fuel

Dual fuel customers see two graphs in the Weekly Comparison, one for electricity usage and one for gas usage. The title is "Compared to last week".

Rates Modeled

If rates are modeled and the utility has opted to display cost information in this module, then cost information is displayed in the comparison rather than usage information.

Cost Tracker

The Cost Tracker module is designed to help residential customers save more energy by showing them how their energy costs are tracking across the month.

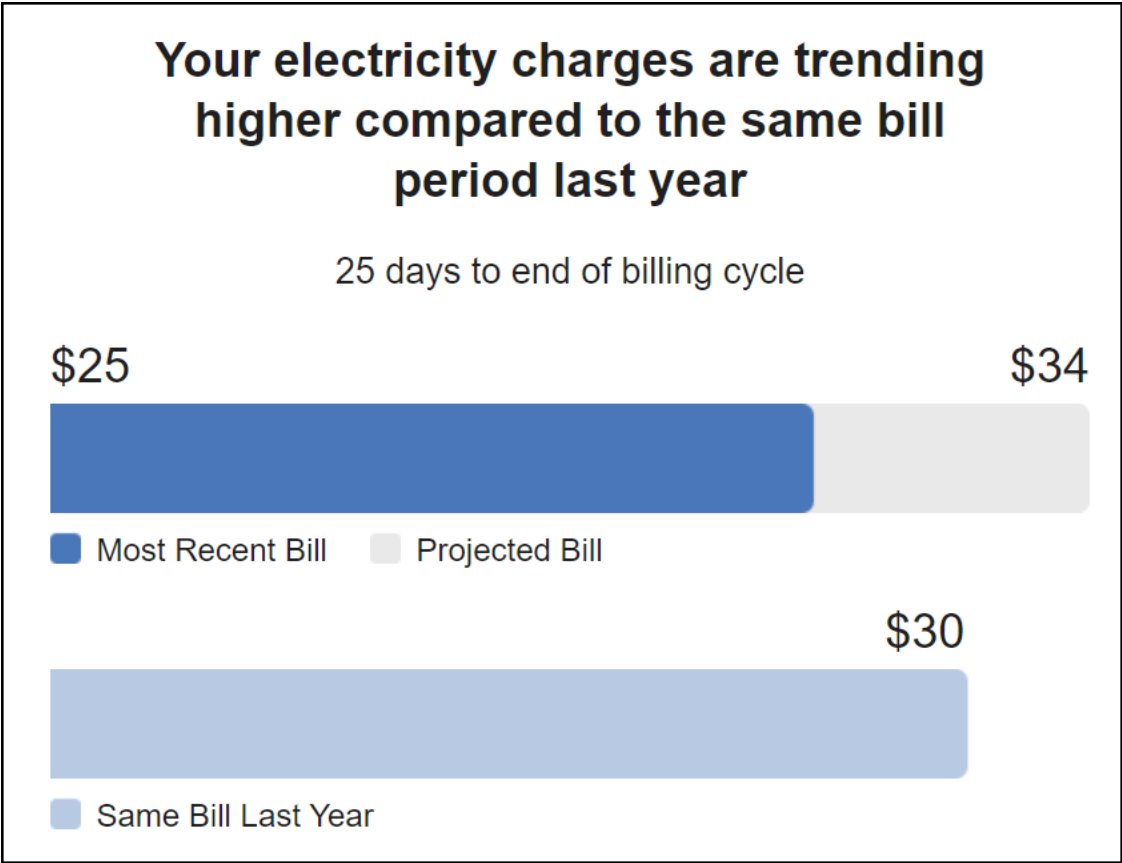
Note: The Cost Tracker module is not included in [Standard Weekly Energy Update](#) emails.

Example

The image below is an example of the Cost Tracker module for electricity customers.

Note

The Cost Tracker module is not included in standard Weekly Energy Update report type emails.



Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

Configuration Option	Input Value
Bar Colors Colors in the graph can match the utility's color palette. Default: The colors in the example represent the default colors.	Required Choose one of the following: - Use the default colors. - Work with your Delivery Team to specify other colors.
Display Cost Information (not depicted) If a customer's rates are modeled, the cost per day can be displayed in the graph. Default: Display cost information if it is available.	Optional Choose one of the following if cost information is available: - Use the default (display the cost information). - Hide the cost information and display usage information instead.

Configuration Option	Input Value
Comparison Range (not depicted) The comparison range determines whether the customer's energy use for the current week falls within the "neutral" state. The neutral state, which provides the message, "You used about the same..." occurs if this week's usage or cost is within +/- <i>n</i> of the specified range. The range is configurable, and can be stated as a percentage. Default: The default is +/- 1% for both usage and cost.	Required Use the following range:

User Experience Variations

The user experience varies for customers depending upon their service types, available data, costs, and locale. Note that the following list indicates the primary user experience variations, not all possible variations.

Gas-Only

For gas-only customers, the electricity unit "kWh" is replaced by "therms" or "CCFs" (whichever unit of measure is appropriate for the utility), and the word "electricity" is replaced by "gas".

Dual Fuel

Dual fuel customers see two graphs in the Cost Tracker, one for electricity usage and one for gas usage. The title is "Compared to last week".

Rates Not Modeled

If rates are not modeled or the utility has opted to not display cost information in this module, then energy use information is displayed in the comparison rather than cost information.

Business Usage Disclaimer

The Business Usage Disclaimer module is a brief message stating that increased energy use might mean that a business is growing.

Example

It can appear in Weekly Energy Updates below the [Weekly Comparison](#) or [Cost Tracker](#) module as a way to reassure business customers that increased energy usage is not necessarily a negative trend, and that there are ways to save energy even when business is busier than usual.

The following is an example of the Business Usage messaging:



Sometimes using more energy can mean your business is busier or growing, and that's great. You can still optimize for savings, exploring how and when to use energy efficiently.

[Explore ways to save](#)

Configuration Options

There are no configuration options for this module.

Bill Forecast

The Bill Forecast module informs customers how much their bill is projected to be by the end of the billing period. Dual fuel customers see a combined bill forecast for both electric and gas use. The purpose of the forecast is to encourage customers to lower their usage before the bill period ends.

Note: The Bill Forecast module is not included in Cost Tracker Report emails, as this forecast is accomplished through the Cost Tracker module.

Example

The image below is an example of the Bill Forecast module for dual fuel customers.



Your bill to date is **\$25**

Your bill is projected to be **\$34**

This estimate is based on 3 days of your billing period.

This is an estimate.

Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

Configuration Option	Input Value
Hide Bill Projection Displays the customer's estimated cost or usage for the end of the bill period. Default: Show the bill projection.	Optional Choose one of the following: • Use the default • Hide the bill projection
Hide Bill-to-Date Displays the customer's current usage or cost for the billing cycle so far. Default: Show the bill-to-date.	Optional Choose one of the following: • Use the default • Hide the bill-to-date
Hide Bill Estimate Message Displays a brief message about what the bill estimate is based upon. Default: Show the bill estimate message.	Optional Choose one of the following: • Use the default • Hide the bill estimate message

User Experience Variations

This section describes the user experience variations in the Bill Forecast module.

Personal Threshold Not Set

When the utility has a default utility-wide threshold, but the customer has not yet set up their own personal threshold, the bill forecast message changes to include a prominent button with the text "CHANGE YOUR THRESHOLD" to prompt users to set their own personal threshold.

Personal Threshold Not Available

If the utility does not implement the personal threshold, all language regarding the customer's personal threshold, and all links or buttons directing customers to set or change the threshold are removed from the message.

Usage

The message can provide a usage forecast rather than a forecasted amount. The usage forecast is shown as a percentage. For example, "Your energy use is projected to be 10% higher this billing period".

Projected Range

Utilities can display a forecast cost range rather than a specific cost value for the projected bill. If you choose to display a range, you do so by specify the range percentage. By default, the range is set to 0 (zero), and therefore, a range is not displayed. If you set the range to 15%, for example, and a customer's projected bill is \$100, the range would display as \$100-\$115.

Display Billing Period Date Range

You can set the Bill Forecast module to display the bill period date range associated with the forecast. The date range appears at the top of the module when set to display. By default, the date range is not displayed.

Day By Day and Hourly Breakdown

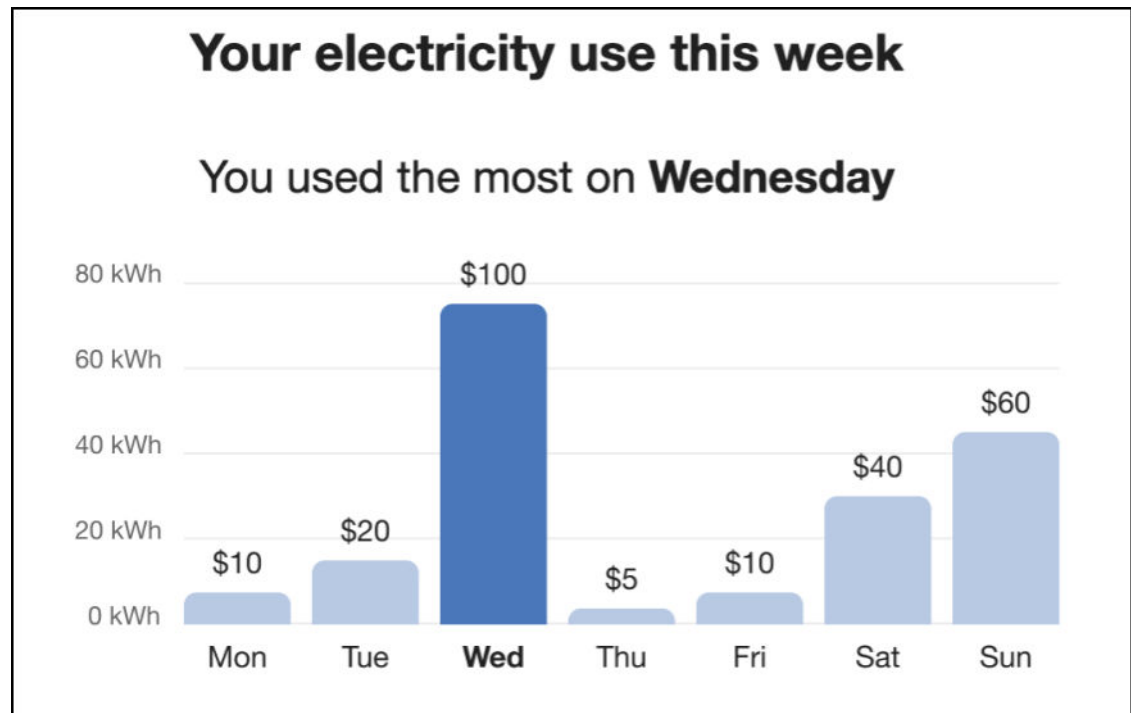
The purpose of the Day by Day and Hourly Breakdown is to provide business customers with a granular view at their energy use by showing them how much energy they spent on each day of the previous week, and also indicating the time of day with the highest energy usage.

Examples

The images below show examples of the Day-by-Day and Hourly Breakdown modules for electricity customers.

Day-by-Day Breakdown

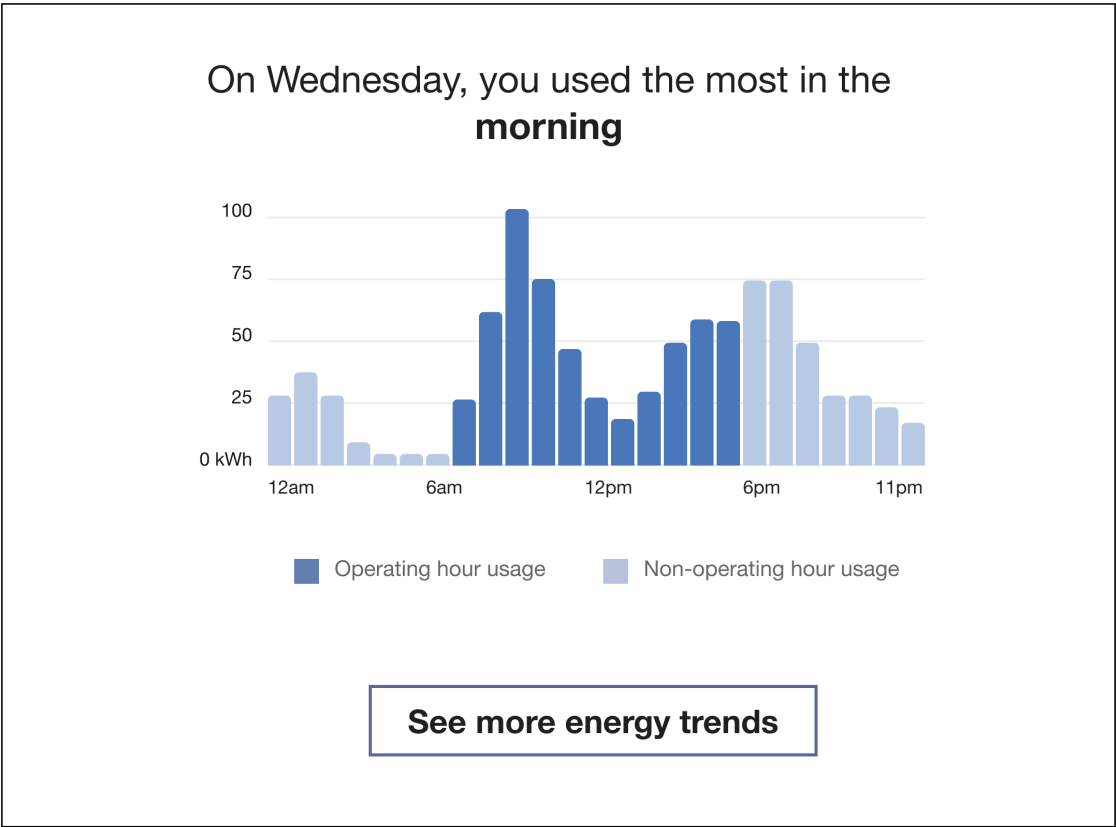
The image below is an example of the Day-by-Day Breakdown module for electricity customers.



Hourly Breakdown

The Hourly Breakdown feature displays the hourly use for a customer's highest use day from the previous week. It allows customers to notice trends in their usage according to the time of day, which helps them identify ways they can save energy. Dual fuel versions of the communication include graphs for both electric and gas use.

The image below is an example of an Hourly Breakdown that includes Operating Hours information for electricity customers.



See More Trends Button: Clicking this link takes business customers to the Data Browser in the Oracle Utilities Opower web portal. If the customer is not signed in to the web portal, they are prompted to either sign in to their account or register if they have not previously done so.

Configuration Options

This section discusses the configuration options for the Day By Day and Hourly Breakdown module.

Day by Day Breakdown Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

Configuration Option	Input Value
Title and Subtitle The title indicates the purpose of the graph. The subtitle indicates the day when energy usage or cost was the highest. Default: Varies by fuel type. See User Experience Variations below for details.	Optional Choose one of the following: - Use the default title and subtitle. - Work with your Delivery Team to specify a different title and subtitle.
Bar Colors Bar colors in the graph can match the utility's color palette. Both the peak bar color and the non-peak bar color can be changed. Default: The colors in the example represent the default colors.	Required Choose one of the following: - Use the default colors. - Work with your Delivery Team to specify other colors.

Configuration Option	Input Value
Display Cost Information (not depicted) If a customer's rates are modeled, the cost per day can be displayed below each bar in the graph. Default: Display cost information if it is available.	Optional Choose one of the following: - Use the default (display the cost information if it is available). - Hide the cost information and display usage information instead.
Operating Hours If the business customer specifies their operating and non-operating hours through their Business Profile, the bar chart indicates each with two distinct color shades. Default: Display operating hours information if available.	Optional Use the default (indicates operating and non-operating hour ranges in the graph).

Hourly Breakdown Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

Configuration Option	Input Value
Title The title indicates the general time period during which the customer used the most energy. Default: Varies by time of day. See User Experience Variations below for details.	Optional Choose one of the following: - Use the default titles. - Work with your Delivery Team to specify different titles.
Line Colors Colors in the graph line graph and in the shading below the line can match the utility's color palette. Default: The colors in the example represent the default colors.	Required Choose one of the following: - Use the default colors. - Work with your Delivery Team to specify other colors.
Call-to-Action URL The call-to-action URL ("See more electricity trends") directs the user to another web feature where this more detailed information about their energy use over time. Default: The link points to the Digital Self Service - Energy Management Data Browser .	Optional Choose one of the following: - Use the default. - Work with your Delivery Team to discuss pointing the link to a different feature or web page.
Operating Hours If the business customer specifies their operating and non-operating hours through their Business Profile, the bar chart indicates each with two distinct color shades. Default: Display operating hours information if it is available.	Optional Use the default (indicates operating and non-operating hour ranges in the graph).

User Experience Variations

The user experience varies for customers depending upon their service types, available data, costs, and locale. Note that the following list indicates the primary user experience variations, not all possible variations.

Title

- “Your electricity use this week”
- “Your gas use this week”

Subtitle

- “You used the most on <day>”

Gas-Only

For gas-only customers, the electricity unit “kWh” is replaced by “therms” or “CCFs” (whichever unit of measure is appropriate for the utility), and the word “electricity” is replaced by “gas”.

Dual Fuel

Dual fuel customers see two separate Day-by-Day Breakdown modules, one for electricity use and one for gas. The heading above each graph specifies the fuel type.

Rates Modeled

If rates are modeled and the utility has opted to display cost information in this module, then cost information is displayed beneath each bar in the graph to indicate the cost of energy for that day.

Operating Hours

If the business customer has filled out the Operating Hours section in their Business Profile, then the bar charts in the Day-by-Day and Hourly breakdowns will show two different shades of blue to differentiate between the energy that was used during operating hours, from what was used during non-operating windows.

Personalized Tips

The Personalized Tips module provides business customers with energy efficiency advice on how to reduce their energy use and bills based upon how the business uses energy.

Example

The image below is an example of the module for business customers.

Our recommended tip for your business



Upgrade to ENERGY STAR® certified commercial refrigerators and freezers

Refrigerators and freezers use a lot of electricity since they're always running. By replacing your standard commercial fridge or freezer with an ENERGY STAR model, **you can save up to 20% on refrigeration costs.**

[See more ways to save](#)

Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

Configuration Option	Input Value
Tip Content The content of each tip focuses on an action that customers can take to reduce energy use, and how much customers can save by doing the action. Default: Varies by tip.	Required Contact Your Delivery Team to discuss which tips and content to include in your program.

Configuration Option	Input Value
Number of Tips The number of tips to display as part of the module, which can range from one to three tips. Default: One tip. This is recommended to keep the content easy to scan and consume.	Optional Choose one of the following: • Use the default. • Work with your Delivery Team to determine the number of tips to display.
See More Ways to Save Button If available, the button directs users to the Business Customer Engagement Digital Self-Service Web Portal Ways to Save page, where customers can see the public-facing version of this page even if they have not signed in. Alternatively, you can configure this button to direct customers to a different web page, or you can disable the button.	Optional Choose one of the following: • Do not include the button. • Use the following URL for the button:

Business Profile

The Business Profile module uses a progress wheel graphic and messaging to encourage business customers to complete their [online profile](#).

Example

The image below is an example of the Business Profile module.

Finish your business profile to get personalized recommendations



Finish your business profile today so we can customize your experience – it only takes a minute.

- ✓ **Business name**
- ? Business type
- ? Square footage
- ? More business details

Finish your profile

Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

Configuration Option	Input Value
Introduction The default introduction of the module can be modified. Default: The default introductory message is shown in the screenshot above. Contact Your Delivery Team to modify the message.	Optional Choose one of the following: • Use the default. • Work with your Delivery Team to modify the default.
Explanation The default explanation of why the business customer should complete the profile can be modified. Default: The default explanation is shown in the screenshot above. Contact Your Delivery Team to modify the message.	Optional Choose one of the following: • Use the default. • Work with your Delivery Team to modify the default.

Marketing Message

A marketing message can appear in the Weekly Energy Update to promote a utility product or program, such as redirecting customers to the Business Customer Engagement Digital Self-Service Web Portal or advertising a utility-specific rebate or discount. This module typically appears before the [Business Profile](#) module.

Configuration Options

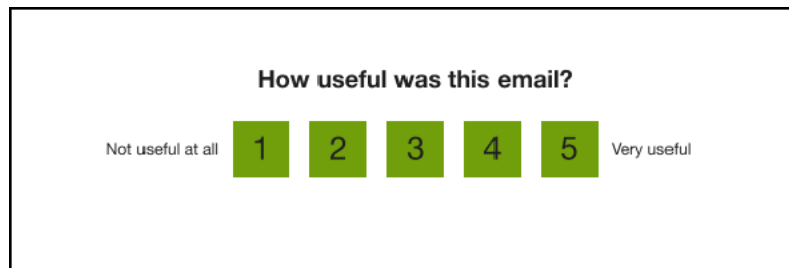
The content within marketing messages is customizable in coordination with Oracle Utilities Opower. Depending on the purpose of the module, you may be required to provide additional inputs. [Contact Your Delivery Team](#) about selecting and configuring marketing message modules that support the Weekly Energy Update program experience.

User Feedback

The User Feedback module solicits feedback from the business customer on the usefulness of the communication they just received.

Example

This image shows an example of the User Feedback module:



The image displays a user feedback form titled "How useful was this email?". Below the title is a horizontal scale with five green square buttons labeled 1, 2, 3, 4, and 5. To the left of the scale is the text "Not useful at all" and to the right is "Very useful".

Configuration Options

There are no configuration options for this module.

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Enrollment

Eligible customers can be enrolled in one of two programs: opt-in or opt-out. In either program, customers can unsubscribe from proactive alert communications at any time.

Opt-In Program: In an opt-in program, customers are given the option to sign up voluntarily, rather than being automatically enrolled. In this scenario, Oracle Utilities and the utility must coordinate to determine how to promote the emails and encourage customers to sign up. Customers can use the Oracle Utilities web portal to enroll in proactive alert communications.

Opt-Out Program: In an opt-out program, customers are automatically enrolled as long as they meet the eligibility criteria. In this scenario, Oracle Utilities coordinates with the utility to select which customers to enroll.

Frequently Asked Questions

This section provides answers to frequently asked questions (FAQs) about configuring the Business Customer Engagement Proactive Alerts cloud service.

- What was the design goal for High Bill Alert communications?
- What are some of the design principles we use in voice alerts?
- Will customers receive more than one SMS message?
- How do customers opt out of High Bill Alert AMI emails?
- How can I prepare my Customer Service Representatives for calls related to High Bill Alert AMI messages?
- If a customer opts out of their utility communications, will they still receive High Bill Alert AMI communications?
- Is there a limit on the size of a URL?
- Why do we recommend initial capitalization (camel case) for URLs and email addresses?
- Is there a way to send out one alert that includes gas and electric usage information?
- Can customers receive email alerts on more than one address?

What was the design goal for High Bill Alert AMI communications?

The goal was to create a very simple alert to allow for the quick comprehension of information, and to use simple visual indicators and messaging to motivate customers to take action resulting in less energy use and a lower bill. Through the wording and visual appearance of the alerts, we catch the user's attention without being too vague or too negative.

What are some of the design principles we use in voice alerts?

Several of the principles we employ are as follows:

- Identify the caller (the utility) clearly.
- Strive for a voice that is clear, strong, and friendly.
- Avoid poor sound quality and long pauses, as these increase the likelihood of a hang up.
- Keep the message to 30 seconds or less. Good scripts are brief, clear, and to the point while avoiding terseness.
- Use wording that clearly conveys to callers that they are interacting with a computer and not a human. (People dislike voice systems that pretend to be a person, or that get too familiar.)

Will customers receive more than one SMS message?

The most common user experience is a single SMS message per alert. SMS scripts are designed with character number requirements in mind to ensure that they fit within a single message. However, if the utility alters the script in a way that exceeds the 160 character count maximum, the alert will be split between two separate messages.

How do customers opt out of High Bill Alert AMI emails?

The High Bill Alert AMI email unsubscribe process meets the requirements of a one-click unsubscribe. If customers would like to opt out, they can do so by clicking Unsubscribe in the email footer.

Customers might also have the option to change their communication preferences from the utility web portal. Customer Service Representatives can also unsubscribe customers over the phone.

Note: When a customer uses the Unsubscribe link to unsubscribe from High Bill Alert AMI email, the customer will be removed from all Oracle Utilities Opower email communications.

If a customer opts out of their utility communications, will they still receive High Bill Alert AMI communications?

Not necessarily. The High Bill Alert AMI program opt-out policy is largely dependent on the digital communication policy set by each utility. Discuss your digital communication policy and its impact on your High Bill Alert AMI program with your Delivery Team.

How can I prepare my Customer Service Representatives for calls related to High Bill Alert AMI messages?

Your customer service representatives will receive the Oracle Utilities Opower customer service guides for the products corresponding to your Oracle Utilities Opower program. The guides provides conceptual and procedural information on how Oracle Utilities Opower products work, how to perform basic tasks within the products, and how to respond to customer inquiries.

Is there a limit on the size of a URL?

Short URLs fit better in our communications and they make it easier for a customer to remember the name. Eliminating the prefix `http://www.` is an easy way to simplify the URL. While using `http://www.` used to be a standard naming practice, it is now a common convention for websites to omit this prefix.

Why do we recommend initial capitalization (camel case) for URLs and email addresses?

Eliminating spaces and capitalizing the first letter of every word (camel case) makes the text more readable. It also makes it easier for customers to type the URL and e-mail address without making errors. For example, you might use `EnergyUsage` instead of `energy usage`. Utilities using a UNIX-based web server must set up the file system to not be case sensitive. Windows file systems are not case sensitive, so no extra configuration is required.

Is there a way to send out one alert that includes gas and electric usage information?

Yes. Customers with both electric and gas fuel types (dual fuel) can receive dual fuel High Bill Alert AMI communications. These communications enable customers to view both types of energy usage at once, and easily determine when their gas or electric usage in particular is high.

Can customers receive email alerts on more than one address?

Yes. If a customer has added multiple email addresses to their account, they can select to receive High Bill Alert AMI alerts on all of their included email addresses.

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Next Steps

After completing all required inputs in this configuration guide, complete the following next steps.

1. Complete any other product-specific configuration guides provided to you by your Service Delivery Manager.
2. Submit all configuration guides and required documents to your Service Delivery Manager as an email attachment. Be sure to include the following:
 - The Oracle Utilities Opower Platform Configuration Guide
 - Up-to-date HTML, CSS, and JavaScript files for your utility website
 - Utility branding guidelines
3. Update the Version table of this guide with your name, the date, and a descriptive comment. Complete this step using the PDF version of this guide.

Note

This HTML documentation is for reference only. Your Delivery Team will give you an editable PDF or DOCX version of the document to capture your inputs. Once submitted to Oracle Utilities, all utility inputs recorded in the configuration guides are final and cannot be modified. Ensure that all configuration inputs are accurate before submitting them.

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Version

The table below is used to track the version of this document. Comments in the table indicate the latest state of the document. For example, the utility could comment "Sent draft to Oracle Utilities" or "Final Sign-off" when the completed version of this document is returned to the Service Delivery Manager for product configuration. Fill out the next row in the table with your name, today's date, and a comment.

Name	Date	Comment

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Contact Your Delivery Team

Your Oracle Delivery Team is the group responsible for setting up, configuring, launching, or expanding your Oracle Utilities Opower program. Contact your Delivery Team if you have any questions about your program products and implementation.

To contact your Delivery Team:

1. Sign in to Inside Opower (<https://inside.opower.com>). This is your portal for questions and information related to your program.
2. Go to the Community tab to see who is on your Delivery Team.
3. Contact any of the team members using the information provided.

If you need to report an issue or get technical support, contact [My Oracle Support](#).