

Oracle Utilities Opower Digital Self Service - Transactions

CSR Guide

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Getting Started

The Digital Self Service - Transactions web portal is a flexible web experience that allows utilities to provide their customers with a one-stop portal to manage their utility account, pay their bill, and start, stop, or transfer service. The web experience is delivered through a modular, mobile responsive design that allows customers to perform self-service transactions on a desktop or mobile device. This documentation reflects the most recent release of Digital Self Service - Transactions, which is listed as part of the [Release Readiness documentation](#).

Customer Service Representatives (CSRs) can answer frequently asked questions, help customers access the web portal, and give customers guidance on how they can be self-sufficient when it comes to managing their service with the utility.

Note: Some of the features described may not be applicable or available to your utility. Contact your supervisor if you have any questions.

Frequently Asked Questions (FAQs)

This section provides a list of questions and answers to some of the most common inquiries that customers have about Digital Self Service - Transactions.

General FAQs

Can I use my device of choice (phone, tablet, laptop, and so on) to access my account?

Yes. The Web Portal uses a responsive design which automatically resizes the content to account for a broad range of devices and screen sizes.

How can I reset my password?

Note to CSRs: Authentication is controlled by an identity provider that is integrated with Digital Self Service - Transactions. Identity providers may handle password reset differently and the directions below are based on common scenarios. Contact your supervisor to determine how password management is handled by your system.

If a customer has forgotten their password, they can use the **Forgot Password** link from the sign in page. They must provide the username or email address associated with their web account to generate an email notification. The email will contain a link to reset the password.

Neighbor FAQs

Note: Depending on each utility's setup and configuration, customers may see "similar homes" terminology in the user interface instead of "neighbor comparison" terminology. Utilities can choose to use one type of terminology or the other based on how they think their customers will react to Oracle Utilities Opower products.

Why are you comparing me to my neighbors?

We are joining other utilities and cities across the country to provide this information because it has been proven to effectively help customers save energy and money. We compare your energy use to the use of similar size homes that are close to yours and use the same heating fuel. We do this to provide you with education and context, and to offer an idea of what you could realistically save.

How did you select my neighbors?

Our goal is to provide you with a comparison that is valid and meaningful. We compare your household to other real households in your area, not a theoretical home with similar characteristics.

To provide valid comparisons, we've chosen specific homes with characteristics that typically lead to similar energy needs, such as home size, heating source, and dwelling type. Most importantly, we only include homes that appear to be occupied at the time of the neighbor comparison.

Why are you trying to make me feel bad?

We are not trying to shame or judge you. If we have offended you, it was not our intent. Rather, we hope that the information we provide can offer valuable insights and context about your home's energy use so that you can save energy and money. We have joined other cities and utilities across the country to provide these reports because they have been proven to help households effectively save.

I have special circumstances. Why don't you take these into account?

We do take some special circumstances into account based on information in your home profile. For example, we can account for what type of heating you use. But there are a few

reasons why we can't take all special household characteristics into account for the neighbor comparison.

We can only compare your usage based on what we know about you and your neighbors. We base your comparison on reliable data that is gathered for households in your area. However, a variety of lifestyle choices and household changes don't have a system of record. For example, we don't have a way of knowing if you have guests visiting, work from home regularly, or just bought new windows. For this reason, we base your comparison on the major, known factors that drive energy consumption.

Some attributes are not a good basis for comparison. For example, you might wonder why we don't compare your home to only homes of a similar age. Similarly aged homes don't necessarily have similar energy needs. Older homes may typically be less efficient, but they are also more likely to have been renovated. New homes may be more efficient in some ways, but they may have more features that use energy (jetted spas, heated floors, central AC, and other similar types of features).

We want the comparison to be meaningful. We hope that the neighbor comparison can offer valuable information and context about your home's energy use so that you can save energy and money.

Even without taking into account everything that's special about your circumstances, the program can still be a useful informational tool and allow for measurement of your own performance over time.

How do you know the comparisons are valid?

Our comparisons include 100 similar, nearby, occupied homes. Our research shows that for almost all residents, this 100-home average indicates typical usage.

How can I improve the accuracy of my neighbor comparison?

There are a few ways you can improve the accuracy of your neighbor comparison. You can take a [Home Energy Analysis](#) survey to tell us more about your home. The answers you provide may impact the tips you see and/or how you compare to your neighbors. I can also help you update your profile.

Note to CSRs: Depending on your utility's setup and configuration, your customers may not have access to the Home Energy Analysis. In such cases you should still be able to make basic changes to a customer's home information. See [Updating a Customer's Home Profile](#) for details. Contact your supervisor if you have any questions.

Are you comparing me to customers at other utilities?

No, you are only compared to other customers in your utility.

What is the difference between neighbors and similar homes?

Depending on each utility's setup and configuration, customers may see "similar homes" terminology in the user interface instead of "neighbor comparison" terminology. Utilities can choose to use one type of terminology or the other based on how they think their customers will react to Oracle Utilities Opower products.

The table below gives a few examples of how and where such differences in terminology may appear. The variation is most likely to appear in features that compare a customer's energy use against that of other customers.

Product or Feature	Terminology
Neighbor comparison in print or email Home Energy Reports	<i>Neighbor comparison:</i> "8% less electricity than efficient neighbors." <i>Similar homes:</i> "8% less electricity than efficient similar homes."
Neighbor comparison in the Oracle Utilities Opower web portal.	<i>Neighbor comparison:</i> "Who are my neighbors?" <i>Similar homes:</i> "What homes are compared?"

These variations are not extensive and only appear in a few places. If you are not sure which variation is used by your utility, check with your supervisor.

Privacy FAQs

Are you sharing my energy use information with my neighbors?

No, your identity is kept completely anonymous. In the case of the neighbor comparison, we use an average of 100 similar homes in your area, but only you can see your own energy use. Many of our customers are finding that this context is very helpful in making decisions about their energy use, and we hope you will find the comparison valuable as well.

Do you use parcel data, and if so, where do you get it?

Yes, we do try to use parcel data (data about a property, such as the size, heating type, and so on) only if it is available, since it helps with the neighbor comparison process.

Note to CSRs: For example, US locales get parcel data from public data sources such as tax assessor or county records. The nature of parcel data and how it is obtained in your country may differ. Have your supervisor contact Oracle Utilities to find out whether parcel data is being used in the product for your customers and how the parcel data is obtained.

What do you use parcel data for?

Parcel data often includes information about a household size, type of heating system, type of cooling system, and so on. We can use this information to identify other households that are similar to yours.

Note to CSRs: If you support customers in a non-US locale, the nature of parcel data may be different than in the US. Have your supervisor contact Oracle Utilities to find out whether parcel data is being used in the product for your customers and what type of information the parcel data contains.

Do you report data about me back to the parcel data source?

No, we do not report any information we collect about you to the source of the parcel data.

Feature-Specific FAQs

The Digital Self Service - Transactions features come with their own sets of frequently-asked questions.

- See "Billing and Payment FAQs" on page 77.
- See "Start, Stop, and Transfer Service FAQs" on page 80.
- See "Manage Web Account FAQs" on page 82.
- See "Alerts and Notifications FAQs" on page 86.
- See "Billing Communications FAQs" on page 86.
- See "Help Center FAQs" on page 90.

Customer Experience

Digital Self Service - Transactions is an authenticated digital customer experience that increases customer satisfaction and reduces cost to serve. Customers can complete

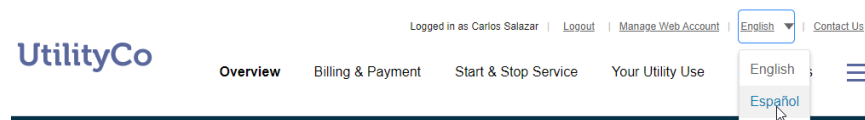
transactional self-service functions such as viewing and paying their bills, signing up for utility programs, and starting and stopping service. The responsive design allows customers to complete all transactions on any device or screen size and orientation.

Digital Self Service - Transactions offers a digital customer experience through the following features.

Note: Digital Self Service - Energy Management features can be included as an add on to the Digital Self Service - Transactions web portal. For customer support capabilities related to Digital Self Service - Energy Management features, see [Supporting Digital Self Service - Energy Management](#).

Language Selection

In addition to the major areas and features listed above, utilities can choose to enable a language selection drop-down list to allow customers to select either English or Spanish. If a customer has defined either English or Spanish as their browser language setting, Digital Self Service - Transactions Web Portal can automatically detect this configuration and display content in the appropriate language. For more information on supporting the Spanish locale, see the [Oracle Utilities Opower Digital Self Service - Transactions Configuration Guide](#).



Multiple Division Support

Multiple division support allows utilities to provide unique experiences on Digital Self Service - Transactions to customers that belong to different divisions and states. This support allows utilities to provide a customized experience to each division without the need of maintaining different portals.

A single Oracle Utilities Customer to Meter portal application can support multiple divisions. Users belonging to different divisions can be provided personalized experiences, ensuring that service agreements and premises match the account's CIS division. Self-service master configuration can be cloned and re-used across multiple divisions allowing utilities to first re-purpose master configuration broadly, and then modify configurations unique to each division. For details on how to configure the different divisions and cloning master configuration, refer to the [Oracle Utilities Opower Digital Self Service - Transactions Configuration Guide](#).

If a utility also configures multiple operating companies, an operating company can have one or more divisions associated with it, allowing utilities to leverage the master configuration cloning mentioned earlier in a single Customer to Meter portal application. If multiple operating companies exist, a Digital Self Service - Transactions application is required to map to and support each operating company. For details on how to map operating companies to associated divisions in a single Digital Self Service - Transactions application, refer to the [Oracle Utilities Opower Digital Self Service - Transactions Configuration Guide](#).

Overview Dashboard

The Overview dashboard introduces customers to information about their account and energy use. It includes the following major components.

Alerts

Any critical, active alerts for a customer are displayed near the top of the screen with an applicable alert message. Only high severity alerts are displayed in this location. All other alerts are available as part of the Notification Center. For more information on these alerts, see "Notifications" on page 59.

The screenshot displays the UtilityCo Overview Dashboard. At the top left is the UtilityCo logo, and at the top right is a hamburger menu icon. Below the logo is a red alert banner with a warning icon and the text: "Your bill is past due for 16 days. [View bill](#)". Below the alert is a dark blue header area with the text "Current account:" and a white dropdown menu showing "Elliot, Gina". Below the header is a white card with account details. On the left side of the card, it says "Due Oct 16" and "\$166.00" in large bold text. Below the amount, it says "You have multiple scheduled payments. [View Details](#)". On the right side of the card, it says "Your Account #9940491655" and "1900 Great Dane Dr, San Francisco, CA, 94103". Below the address, there are two status indicators: "Paperless Billing" with a "Not enrolled" button and "Automatic Payments" with an "Enrolled" button.

Account Selector

Customers can use the **Current account** drop-down list to select the utility account they want to view. All utility accounts connected to a web login are available for selection, and

an account search is displayed for customers with five or more accounts. Additionally, the account selector is available on all applicable areas of the Digital Self Service - Transactions web portal such as Billing and Payment and Alerts and Notifications. Customers can also select the **Manage Accounts** option from the drop-down list to modify their connected accounts. For more information on options customers have for managing their accounts, see "Manage Web Account" on page 35.

Bill Information and Announcements

Details about a customer's most recent bill and summary information about their account are presented as an initial insight into the customer's account. Customers can also quickly navigate to bill actions such as paying their current bill or enrolling in billing programs such as autopay.

Outstanding balance. < 2 of 3 >
The amount of \$903.01 is outstanding on your account.

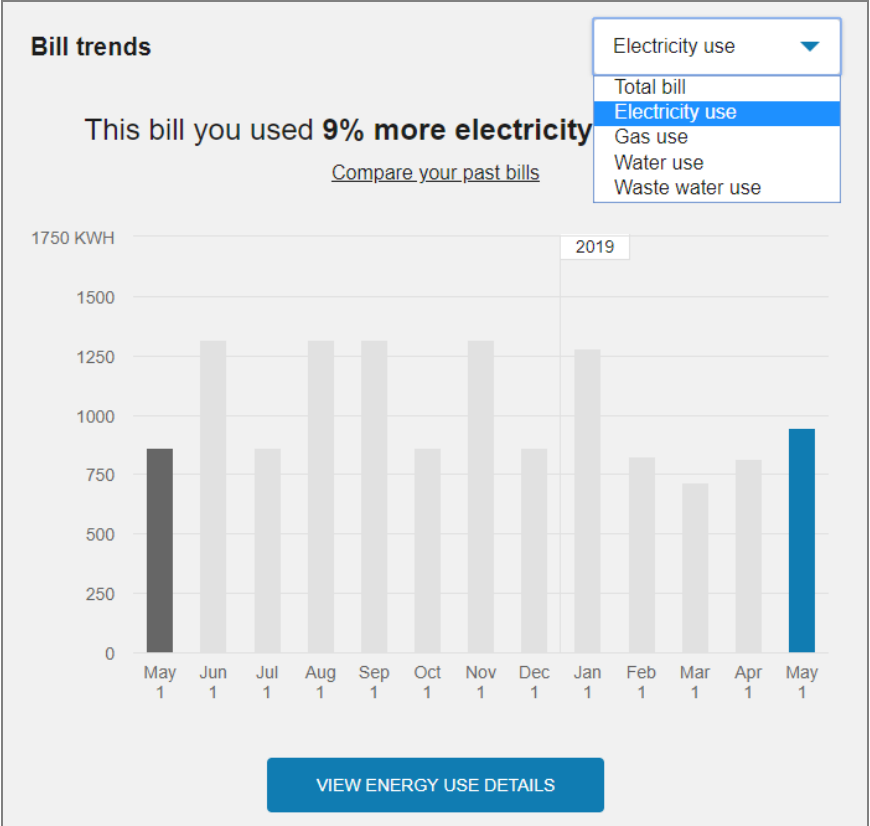
Announcements provide important information to the customer such as an outstanding balance notice, program enrollment status (see "Manage Billing" on page 14), open service tickets, or pending start or stop service requests.

Available announcements can include:

- Active Pay Arrangement
- Enrolled in Budget Billing: The total budget billing payment for each billing period and the frequency of the account reconciliation is displayed.
- Open Service Task
- Pending Start or Stop Request
- Outstanding Balance: All new charges from the current bill period are excluded from the outstanding balance. If the customer has a prepaid account, the outstanding balance is not displayed. If the account does not have an active payment arrangement service agreement in a pending or active status, and it is not disqualified for payment arrangements, a link is displayed to sign-up for payment arrangements.
- Prepay Biller Information: For accounts with an active Prepay Biller, the prepaid balance is shown when the value is below a certain configurable threshold.

Usage and Bill Trends

Graphs display insight into a customer's use and costs trends for their available service types. Insights for each applicable service type allow the customer to compare the current bill to the bill from the same time last year.



If a utility purchases Oracle Utilities Opower Digital Self Service - Energy Management Cloud Service, links to Digital Self Service - Energy Management tools are provided for customers to review additional details about energy cost or use trends.

Recommended Tips

Links to cost-saving tips are displayed, which instruct customers on how they can use less energy, water, or wastewater, and save money. See the [Oracle Utilities Opower Digital Self Service - Energy Management Cloud Service Product Overview](#) for more information on the Ways to Save features.

Recommended summer tips for you

<p>Save when working from home</p> <p>6 tips</p>	<p>How to make your home more comfortable</p> <p>13 tips</p>	<p>Smart upgrades for your home</p> <p>34 tips</p>
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SEE MORE TIPS

Next Best Action

Promotion of programs and services to customers are available through Next Best Action, which is a Digital Self Service - Energy Management Cloud Service add on. Next Best Action provides dynamic and actionable web banners that can be shared with all customers or targeted to specific customer groups. The web banners guide customers to the most valuable opportunities or solutions available and helpful tools to help them manage energy use and costs. See the [Oracle Utilities Opower Digital Self Service - Energy Management Cloud Service Product Overview](#) for more information on the Next Best Action features.

Billing and Payment

Digital Self Service - Transactions includes billing and payment features such as viewing and paying a bill, reviewing payment history, and selecting billing and payment options such as paperless billing. Links are available to customers to take common billing actions such as viewing more details about their current bill, comparing previous bills, exploring their energy use, and changing their utility account communication preferences.

Note: Restrictions can be configured across the Digital Self Service - Transactions web portal to prohibit cash-only users from making payments. This configuration hides the options for users to make a payment online, sign-up for auto-pay, or add a bank account to their wallet. Additional configurations are available to display messaging for cash-only users in their balance overview, landing page, and manage bank account options.

View Bill

Customers can view their current bill at a glance to review their new charges, bill due date, previous balance, and any applicable payments or adjustments. An option is available to make a one-time payment on the current bill. Customers that select this option are prompted to select the payment amount, date, and payment method. If customers have saved bank accounts to their account, as described in "Manage Bank Accounts" on page 19, they can choose one of their saved bank accounts for payment. The total balance due is provided as the default payment amount. Customers can also be provided an option to make a charitable donation before submitting their payment. If a customer manages multiple accounts, they have the option to pay multiple accounts in a single payment transaction. If an account is a cash-only account, it cannot be used to submit online payments.

Note: If customers are enrolled in automatic charitable contributions for a given charitable organization as described in "Charity Contributions" on page 18, the customer is shown their automatic charitable payment amount when making a one-time payment. The customer cannot apply further contributions to that charity as part of the one-time payment.

The option to download a PDF copy of the current bill is available if the utility completes the integration to support bill downloads. Refer to [Oracle Utilities Opower Digital Self Service - Transactions Bill Download Integration Guide](#) for steps to complete bill download integration.

Bill Details	
Posted November 1, 2019	
Previous Balance	\$715.58
Payment Towards Previous Balance	\$0.00
Past Due	\$715.58
Please pay this balance right away	
New Charges	\$290.87
See details in module below	
Total	\$1,006.45
View bill (PDF)	MAKE A PAYMENT
Due November 18, 2019	

A comprehensive listing of current bill details is available with the **Breakdown of new charges**. Customers can review their current bill charges broken down by premises, service type, and service point. Factors that can influence use and costs such as bill length, rate tariffs, tier breakdowns, and taxes are also highlighted.

Breakdown of new charges

1900 Great Dane Dr, San Francisco, CA, 94103

Electric residential rate **\$85.24**

Apr 1 - May 1 30 days

Apr 2 - May 1

Service charge	\$15.00
166.36 kWh at \$0.134 per kWh peak usage	\$22.29
552.12 kWh at \$0.03029 per kWh off peak usage	\$16.72
143.00 kWh at \$0.06783 per kWh mid peak usage	\$9.70
PCA 861.48 kWh at \$0.00547 per kWh	\$4.71
Energy total	\$53.42
City sales tax 11.5%	\$7.87
State sales tax 7.5%	\$8.78
County sales tax 0.25%	\$0.17
Total charges	\$85.24

Service ID: 9949136356

Rate Plan: Electric residential time of use (on/off/mid)

Total new charges **\$85.24**

[View bill \(PDF\)](#)

Billing and Payment History

Customer can select to view **Billing and Payment History**, which provides a record of posted bills and payments scheduled by the customer. Posted bills include a summary of the previous balance and new charges, as well as a link to view the applicable bill. The most recent transactions are displayed first, along with the option to view additional transactions. All payment transactions include a confirmation number, the last four digits of the applicable payment method, and the tender type that provides additional details on how the payment was processed.

Note: Transactions such as bill cancellations and rebills are grouped into the current bill and are included as an adjustments line item.

Future, scheduled payments are also displayed, including a breakdown of charges which may include multiple account transactions or charitable contributions. Customers can also cancel any scheduled payments.

To help find applicable transactions quickly, customers can use the filters on transaction type and transaction date to limit the transactions that are displayed. This can include displaying only pending transactions, or displaying only transactions from this year. All filters can be cleared to display all available transactions.

Customers can select to download all financial history as a comma separated value (CSV) file.

For historical bill posting events, customers can select to download a copy of the bill. The option to download a PDF copy a bill is available if the utility completes the integration to support bill downloads. Refer to [Oracle Utilities Opower Digital Self Service - Transactions Bill Download Integration Guide](#) for steps to complete bill download integration.

The availability period for bill downloads, along with an informative message that explains bill download availability, are configurable. The bill download button is automatically displayed or hidden based on the configured availability. By default, bills within the last year are available for download.

Billing and payment history

All transactions ▼ All dates ▼ Clear [Download history](#)

i You can only download files up to a year old.

Date	Activity	Amount
Oct 15, 2022 ▼	Bill posted	-\$8.70 ↓
	Gas service	\$41.30
	Adjustment	-\$50.00
	Total bill	-\$8.70
	View bill details	
Sep 23, 2018 ▶	Payment received	-\$38.00
Sep 12, 2018 ▶	Bill posted	\$38.00 ↓
Sep 12, 2018 ▶	Bill posted	↓

Projected Bill

The projected bill shows customers their current usage or cost so far in the billing period, their projected usage or cost for the billing period, and how that compares to their typical usage or cost for the period, based on their past usage.

Compare Bills

Customers can compare the costs of their current bill to previous bills. The Bill Comparison allows customers to compare their current bill to their previous bill and to the corresponding bill from the same time period the previous year. If data from the previous year is not available, only an analysis against the previous bill period is available. A bill period from the previous year is defined as the bill period that overlaps the most with the current bill period. Customers can also use the **This Bill** drop-down list to select a historical bill to review the applicable previous bill comparison.

Manage Billing

Customers can enroll in the following programs, configured by the utility to manage the payment of their utility bills. All programs, except for paperless billing and charitable contributions, include a list of FAQs to explain the programs and provide more details on how they affect a customer's account.

Note: If a utility chooses not to offer a program to customers or a customer is ineligible for a program, the program is hidden from the Manage Billing list.

Manage billing

Paperless Billing Ditch the paper with emailed bills	Enrolled >
Automatic Payments Automate your bill payments	Enrolled >
Payment Arrangement Pay off an outstanding balance in manageable pieces	Not Enrolled >
Budget Billing Even out your bills	Not Enrolled >
Charity Contributions Charity Auto-Pay	Not Enrolled >
Payment Extensions Allow extra time to pay your bill	Enrolled >

Set your billing preferences

Preferred Payment Date Pick the date your utility bill is due each month	>
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Paperless Billing

Paperless billing provides the same information as paper bills, delivered through email. Links to important customer actions such as viewing or paying a bill are included.

Customers can enroll in paperless billing at any time using their desired email address. They can also edit their email address or unenroll at any time.

Note: Paperless billing enrollment can be configured to allow customers to enroll in paperless billing while also retaining the option to receive paper bills as well. Customers who enroll in paperless billing then have the option to remain enrolled in paper bills as well or opt-out of paper bills. For information on this configuration, refer to the [Oracle Utilities Opower Digital Self Service - Transactions Configuration Guide](#).

Paperless Billing

Ditch the paper and receive your bills via email.

How it works

You'll get your bill delivered to your inbox, faster than you would normally receive it in the mail. And if you want a paper copy of your bill, you can always print one out from your online account.

Send to your primary email address:

jdoe@example.com

ENROLL

Automatic Payments

Automatic payments allow customers to automatically pay their bills using their preferred payment method. Customers who enroll in automatic payments must provide their checking account or credit card information, along with a recurring date for the automatic payments. Enrolled customers can unenroll at any time. If automatic payments are processed by a third-party provider, customers are redirected to the third-party credit card processor to complete the unenrollment.

Automatic Payments

Never worry about missing a bill payment.

How it works

Once you choose your preferred payment settings, you'll be automatically charged each bill period when the bill is due—no need to log in or worry about when your bill is due.

Frequently asked questions

- ▶ When will this go into effect?
- ▶ How does the "maximum" payment setting work?

How would you like to set up automatic payments?



Credit Card



Bank account / Debit card

Budget Billing

Customers interested in fixed payments, also referred to as budget billing, can review details about the utility's fixed payment plan. This includes information on how the plan works, how much it costs per bill, advantages of signing up for the program, and a list of frequently asked questions.

Interested customers can easily enroll in the program, and enrolled customers are provided the option to unenroll from the program. Budget billing allows customers to avoid fluctuations in their billing throughout the year and pay a set price which remains consistent for the length of the program. A true-up for the difference the customer paid and their actual costs is sent at the end of the budget billing cycle.

Budget Billing

Budget Billing evens out your utility bills into fixed payments, so you know exactly what you'll owe each month.

How it works

The Budget Billing program averages your utility bills from the previous 12 months and divides them into equal monthly payments.

To settle any differences between your monthly payments and actual use, you may receive a true-up charge or credit at the end of the year.

What you'll get

- Zero bill fluctuation, even during periods of higher use.
- Easier-to-manage monthly expenses.
- No monthly fees—this service is completely free.


Budget Billing is only available to customers that have been with UtilCo for at least 12 months.

Frequently asked questions

- ▶ [How is Budget Billing calculated?](#)
- ▶ [What is a "true-up"?](#)
- ▶ [Understanding your monthly statement](#)

Your monthly bill \$ 20.20

You will pay \$20.20 each bill period with a true-up payment every 12 periods.

 **Enrolled** [UNENROLL](#)

Payment Arrangement

Utilities can offer payment arrangement plans to customers with unpaid balances. Customers can review details about the utility's payment arrangement plan, including information on how the plan works, their current unpaid balance, and a list of frequently asked questions. Interested customers can enroll in the program and select from available payment options. The payment options break the unpaid balance down into equal payments over a specified number of bills.

Enrolled customers can monitor their remaining balance from the payment arrangement page. They can review the start date of their plan, the initial amount, and the monthly amount due to keep track of their progress on paying off their balance. Service agreement types and service agreement numbers related to the payment arrangement can also be displayed to customers and customer service representatives.

Note to CSRs: After a customer is enrolled, they cannot unenroll online. If configured, customers can use the contact us form to request unenrollment, which creates a task in Oracle Utilities Customer Care and Billing for a customer service representative to contact the customer and guide them through the process.

<p>Payment arrangement</p> <p>Payment arrangement spreads out an unpaid balance over future bills, so you can pay it off in manageable amounts.</p> <p>How it works</p> <p>Your previously unpaid balance is divided into smaller amounts, and then added to new bills in equal installments.</p> <p>What you'll get</p> <p>Smaller amounts to pay off at a time.</p> <p>Frequently asked questions</p> <ul style="list-style-type: none"> ▶ How does Payment arrangement affect my bill? ▶ Who is eligible for Payment arrangement? 	<p>Plan details</p> <p>Pay arrang. - Regulated debt</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 60%;">Remaining balance</td> <td style="text-align: right;">\$68.00</td> </tr> <tr> <td>Start date</td> <td style="text-align: right;">07/11/2023</td> </tr> <tr> <td>Initial amount</td> <td style="text-align: right;">\$68.00</td> </tr> <tr> <td>Monthly amount</td> <td style="text-align: right;">\$22.67</td> </tr> <tr> <td>Remaining payments</td> <td style="text-align: right;">3</td> </tr> </table> <hr style="border: 0.5px solid #ccc;"/> <p style="text-align: center;">✔ Enrolled</p>	Remaining balance	\$68.00	Start date	07/11/2023	Initial amount	\$68.00	Monthly amount	\$22.67	Remaining payments	3
Remaining balance	\$68.00										
Start date	07/11/2023										
Initial amount	\$68.00										
Monthly amount	\$22.67										
Remaining payments	3										

Charity Contributions

Utilities can offer charitable contribution plans that allow customers to make donations to available charitable organizations every billing period. When a customer enrolls in charitable contributions, they are presented with charitable organizations that the utility has configured. Each organization is a separate enrollment, and during enrollment customers can select their contribution amount to apply during each billing cycle. Customers can unenroll in a charitable payment or modify their contribution amount at any time.

Payment Extensions

Utilities can offer payment extension plans that allow customers to extend the due date of their bills. The customer eligibility requirements, length of extension, and amount of a customer's bill that can be included in a payment extension is configurable by a utility.

There are two ways that a utility can offer extensions, extension of a past due amount only, or extension of the full account balance. A utility can configure either or both options and allow users to choose which one they want when both options are available. If a utility chooses not to offer payment extensions, this option is hidden from view.

Eligible customers can enroll in payment extensions from the Manage Billing area. Enrollment in payment extensions can modify alerts related to a customer's bill. For more information on alerts, see "Notifications" on page 59.

The customer's program options and their enrollment status are displayed regardless of whether they signed up with an agent of the utility or through the self-service options. Customers enrolled in a payment extension for a bill are automatically unenrolled after they complete payment for their extended amount. Customers can then re-enroll in payment extensions for future bills if required.

Preferred Payment Date

Customers can choose a due date for their utility bill that better meets their needs. There are two ways a utility can offer a preferred due date program, customers can either be offered to extend their current due date by a certain number of days or they can choose from a list of available due dates that have been set by the utility. The request is automatic, in real time, and is effective as early as the customer's next bill.

Preferred Payment Date

With the preferred due date program, residential customers can pick the date their utility bill is due each month, such as the 1st or 15th.

How it works

Our Preferred Due Date option lets you request a billing due date that fits with your cash flow. It's a program that works well for those on a fixed income or whose paychecks come at specific times during the month.

Frequently asked questions

- ▶ [Who is eligible?](#)
- ▶ [When does it take effect?](#)

Preferred due date

Your due date for John Smith is 16th of every month

Choose a new day of the month

Due date: 16th Day ▼ of every month

[CONTINUE](#)

Utilities can also define eligibility criteria for requesting a due date change. For example, eligible customers can be required to have an active account with no past due balances.

Manage Bank Accounts

Customers can manage their Automated Clearing House payments directly from within Digital Self Service - Transactions by adding and managing bank accounts. Customers can add or delete their bank accounts using Digital Self Service - Transactions without calling their utility. This feature also eliminates the customer's need to add their bank account for every payment. Customers can manage and distinguish between multiple bank accounts with descriptive names.

Manage Bank Account

Add a new bank account Close ▲

First Name

Last Name

Checking

Bank Routing Number

Bank Account Number Re-enter Bank Account Number

0123456789
10111213141516171819
20212223242526272829
30313233343536373839

Bank Routing Number
Bank Account Number
Checking Number
(Not Needed)

You have only one active bank account

▶ Wells Fargo Bank 🗑

Rates


The Rate Comparison feature allows customers to see an overview of rate plans for which they are eligible, estimated cost information, and details about each rate plan option. Customers can compare rate plans in terms of estimated annual costs and quickly identify their cheapest rate. Further rate analysis is available through additional rate details and the ability to perform what-if scenarios representing energy use choices the customer can make. For additional information on the features available with Rate Comparison, refer to the [Oracle Utilities Opower Digital Self Service - Energy Management Cloud Service Product Overview](#).

Savings Hub


Savings Hub is a visual, interactive tool that prompts customers to answer simple questions about their home and finances. A customer's responses to the questions are then used to create a personalized list of available energy efficiency and financial assistance programs that can help them reduce and pay their utility bills.

Find out if you're eligible for financial assistance


Here's how to get started:



Take a 2-minute survey about your household



Check out your recommended programs



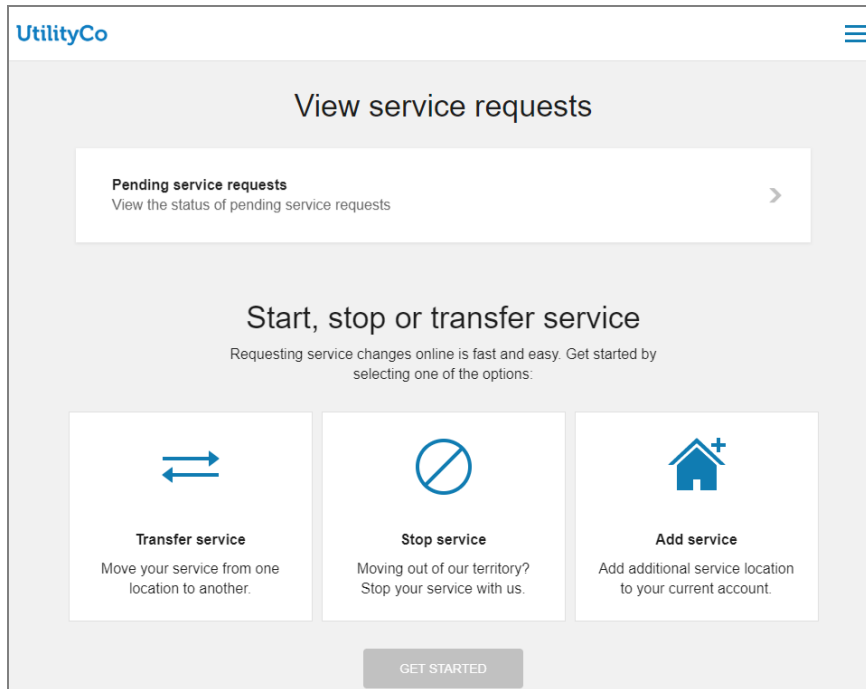
Apply for programs and receive benefits

[BEGIN SURVEY](#)

Start, Stop, and Transfer Service

Self-service options are available to the customer to start, stop, or transfer utility service. These options quickly walk the customer through the process and requirements to complete their service transaction. Customers can also view pending start and stop requests.

Note: Digital Self Service - Transactions offers two options for Start, Stop, and Transfer Service features. The Classic version provides all functionality available with 23A and earlier releases, along with continued support in current releases. Starting with 23B, Start, Stop, and Transfer Service provides a separate set of features for these service requests. The Classic terminology in this documentation is used to distinguish the features originally released prior to 23B.



Start, Stop, and Transfer Service Classic

Start Service Classic

Existing and new customers can start a new service using a process that provides clear instructions and requirements. Customers can start a new service by using the general workflow described below:

1. **Access Site:** Customers access the start service process through the utility website. Customers that do not have an account are not required to log in to complete the start service request. Existing customers that are adding additional service for their account must log in to their account prior to starting an add service request.
2. **New Service Details:** Customers provide the following information to start or add service:
 - **Service Address:** The full street address for the new service. Valid addresses are displayed for selection to the customer based on the address information provided.
 - **Identity Verification:** Personal information from the user is required to verify their identity before they can proceed. Identity verification parameters are configured using Oracle Utilities Customer Care and Billing. For more information on defining identity verification parameters, see the [Oracle Utilities Opower Digital Self Service - Transactions Configuration Guide](#).

- **Address Details:** Additional information about the address, which can include the type of home, number of occupants, and whether they rent or own the home. Applicable details are determined by the utility.
 - **Start Date:** The date to begin service. A date selector allows customers to browse to the applicable day. Information on the service start process and requirements are also included.
3. **Account Preferences:** Customer provide the following account preference information to start or add service:
- **Mailing Address:** A customer's mailing address is required. The service address acts as the default mailing address. Mailing address validation can be enabled and configured, with additional steps covered in the [Oracle Utilities Opower Digital Self Service - Transactions Configuration Guide](#).
 - **Optional Programs:** Paperless billing and ACH automatic payments are available for enrollment when a new account is created.

Automatic payment enrollment performed during a start service request follows the same NACHA business rules configured for general automatic payments. For credit card automatic payment enrollment, customers must follow enrollment steps after their account has been created rather than during the start service process.

4. **Review and Confirm:** All information provided by the customer is displayed for review. Customers can choose to edit any information that is incorrect.

For new customers, a new account and service are created, which are linked to the web user automatically. For existing customers, new service is created as part of the customer's existing account. In both scenarios, the customer must connect to their account using the Account and Preferences options (see "Manage Web Account" on page 35).

Stop Service Classic

Customers can stop all services for a given account by using the general workflow described below:

1. **Access Site:** Customers access the stop service process through the utility website and must log in to their account.
2. **Stop Service Details:** Customers provide the following information to stop service:
 - **Service Address:** The street address for the service that is to be stopped.
 - **Stop Date:** The date to stop service. A date selector allows customers to browse to the applicable day. Information on the service stop process and requirements are also included.

3. **Contact Information:** A customer's phone number and mailing address are required. Mailing address validation can be enabled and configured, with additional steps covered in the [Oracle Utilities Opower Digital Self Service - Transactions Configuration Guide](#).

The following options are available when updating the phone number:

- Customers can change the primary contact number by selecting one from the list provided.
 - Customers can add a new contact, fill in the required information, and the new contact is associated with their account.
 - In some cases, contacts may be marked as inactive in the Oracle Customer Information System. If customers attempt to add an inactive contact as their new contact, a notification is displayed. Customers can then choose to reactivate the contact or select a different contact.
4. **Review and Confirm:** All information provided by the customer is displayed for review. Customers can choose to edit any information that is incorrect.

Transfer Service Classic

Customers can quickly move service from one premise to another using the general workflow described below:

1. **Access Site:** Customers access the transfer service process through the utility website and must log in to their account.
2. **New Service Details:** Customers provide the following information to start new service as part of the transfer.
 - **Service Address:** The full street address for the new service.
 - **Start Date:** The date to begin service at the new address. A date selector allows customers to browse to the applicable day. Information on the service start process and requirements are also included.
 - **Address Details:** Additional information about the address, which can include the type of home, number of occupants, and whether they rent or own the home. Applicable details are determined by the utility.
3. **Stop Service Details:** Customers provide the following information to stop service as part of the transfer.
 - **Stop Service Address:** The street address for the service that is to be stopped as part of the transfer of service.
 - **Stop Date:** The date to stop service. A date selector allows customers to browse to the applicable day. Information on the service stop process and requirements are also included.

4. **Contact Information:** A customer's phone number and mailing address are required. The service address acts as the default mailing address.

The following options are available when updating the phone number:

- Customers can change the primary contact number by selecting one from the list provided.
- Customers can add a new contact, fill in the required information, and the new contact is associated with their account.
- In some cases, contacts may be marked as inactive in the Oracle Customer Information System. If customers attempt to add an inactive contact as their new contact, a notification is displayed. Customers can then choose to reactivate the contact or select a different contact.

5. **Review and Confirm:** All information provided by the customer is displayed for review. Customers can choose to edit any information that is incorrect.

Start, Stop, and Transfer Service

The Start, Stop, and Transfer Service features provide flexible options for:

- Third-party Identity or credit check integration.
- Duplicate customer prevention.
- Co-applicant processing.
- Individual start service selection.
- Questions and answers administration and processing.
- Customer deposit assessment.

Start Service

Existing and new customers can start a new service using a process that provides clear instructions and requirements. Customers can start a new service by using the general workflow described below:

1. **Access Site:** Customers access the start service process through the utility website. Customers that do not have an account are not required to log in to complete the start service request. Existing customers that are adding additional service for their account must log in to their account prior to starting an add service request.
2. **Service Address:** The customer provides the full street address for the start service request. Matching valid addresses are displayed for selection based on the address information provided. The customer selects the correct service address.
3. **Account Type:** The customer selects if they are a residential or commercial customer. This is applicable only if a new account is being created, which can apply for both new or existing customers.

4. **Account Selection:** The customer selects the account they want the new service to be associated to. This is applicable for existing customers only when multiple CIS Division is supported.
5. **Identification:** The customer provides personal or business information to verify their identity such as name, identification information, date of birth, phone number, and email. Not all details are editable for existing customers.
6. **Co-applicant:** The customer provides co-applicant information such as name, identification information, relationship type, date of birth, phone number, and email. This is applicable for new customers only.
7. **Start Service Details:**
 - a. **Start Date:** The customer selects the date for the new service to begin.
 - b. **Services to Start:** The customer selects or confirms the services that are to be started as part of the request.
 - c. **Miscellaneous Start Service Information:** The customer answers various questions, which may include meter access, safety, rates, and other options that can be used to further process the start service request.
8. **Preferences:**
 - a. **Mailing Address:** The customer provides an alternate mailing address or confirms if it is the same as the service address.
 - b. **Optional Programs:** The customer can enroll in paperless billing and in automatic payments. This is applicable for new customers only.
9. **Deposit:** The customer confirms any required deposit for the start service request.
10. **Review and Submit:** The customer reviews and submits the start service request. The customer can go back to previous steps and edit the information provided.
11. **Confirmation:** The customer confirms that the start service request was submitted successfully. A confirmation number is shown to the customer. For new accounts, the customer may also see an account number.

For logged-in customers, new account or services are created and, if enabled, can be linked to the web user automatically. Otherwise, the customer must connect their account to their web user through the Account and Preferences options (see "Manage Web Account" on page 35).

Stop Service

Customers can stop all services for a given account by using the general workflow described below:

1. **Access Site:** Customers access the stop service process through the utility website and must log in to their account.

2. **Stop Service Details:** Customers provide the following information to stop service:
 - a. **Stop Date:** The customer selects the date to stop service. A date selector allows customers to browse to the applicable day. Information on the service stop process and requirements are also included.
 - b. **Services to Stop:** The customer selects or confirms the services that are to be stopped as part of the request.
 - c. **Miscellaneous Stop Service Information:** The customer answers various questions, which may include meter access, safety, and other options that can be used to further process the stop service request.
3. **Contact Information:** A customer's phone number and mailing address are required. Mailing address validation can be enabled and configured, with additional steps covered in the [Oracle Utilities Opower Digital Self Service - Transactions Configuration Guide](#).

The following options are available when updating the phone number:

- Customers can change the primary contact number by selecting one from the list provided.
 - Customers can add a new contact, fill in the required information, and the new contact is associated with their account.
 - In some cases, contacts may be marked as inactive in the Oracle Customer Information System. If customers attempt to add an inactive contact as their new contact, a notification is displayed. Customers can then choose to reactivate the contact or select a different contact.
4. **Review and Submit**The customer reviews and submits the stop service request. Customers can choose to edit any information that is incorrect.
 5. **Confirmation:** The customer confirms that the stop service request was submitted successfully. A confirmation number is shown to the customer.

Transfer Service

Customers can quickly move service from one premise to another using the general workflow described below:

1. **Access Site:** Customers access the transfer service process through the utility website and must log in to their account.
2. **Start Service Details:** Customers provide the following information to start new service as part of the transfer.
 - a. **Service Address:** The customer provides the full street address for the start service request portion of the transfer. Matching valid addresses are displayed for selection based on the address information provided.
 - b. **Start Date:** The customer selects the date to begin service at the new address.

- c. **Services to Start:** The customer selects or confirms the services that are started as part of the request.
 - d. **Miscellaneous Start Service Information:** The customer answers various questions, which may include meter access, safety, and other options that can be used to further process the start service request.
 - e. **Deposit:** The customer confirms any required deposit for the start service request.
3. **Stop Service Details:** Customers provide the following information to start new service as part of the transfer.
 - a. **Stop Date:** The customer selects the date when the current service is stopped. A date selector allows customers to browse to the applicable day. Information on the service stop process and requirements are also included.
 - b. **Services to Stop:** The customer selects or confirms the services that are to be stopped as part of the request.
 - c. **Miscellaneous Stop Service Information:** The customer answers various questions, which may include meter access, safety, and other options that can be used to further process the stop service request.
4. **Contact Information:** The customer updates the phone number or mailing address. Mailing address validation can be enabled and configured, with additional steps covered in the [Oracle Utilities Opower Digital Self Service - Transactions Configuration Guide](#).

The following options are available when updating the phone number:

- Customers can change the primary contact number by selecting one from the list provided.
 - Customers can add a new contact, fill in the required information, and the new contact is associated with their account.
 - In some cases, contacts may be marked as inactive in the Oracle Customer Information System. If customers attempt to add an inactive contact as their new contact, a notification is displayed. Customers can then choose to reactivate the contact or select a different contact.
5. **Review and Submit:** The customer reviews and submits the transfer service request. The customer can go back to previous steps and edit the information provided.
 6. **Confirmation:** The customer confirms that the transfer service request was submitted successfully. A confirmation number is shown to the customer.




Pending Requests

Customers can review pending start and stop service requests. For transfer requests, the applicable and separate start and stop requests are included in a customer's pending requests.

Note: Pending request functionality is identical for both Start, Stop, and Transfer Server versions.

Pending service requests

A requested change to your service is awaiting processing. If you need to make a change to your pending requests, contact (123) 456-7890.

REQUEST	ADDRESS	SERVICE	DATE OF CHANGE	SERVICE AGREEMENT
 Stop	703 Weis Road San Mateo CA 94404	Electric Service	06/29/2020	0515360264
 Stop	701 Weis Road San Mateo CA 94404	Electric Service	06/29/2020	0518849641
 Start	17 Salem St San Francisco CA 95404	Electric Service	12/10/2020	0518930121

[BACK TO SERVICE PAGE](#)

A customer can select a pending service requests notification or the **Pending service requests** item at the top of the Start, Stop, and Transfer Server page to review information related to pending requests, including:

- **Request Type:** Identifies the requests as start or stop requests.
- **Address:** The address is provided for pending requests for a specific premise.

For requests that are for an account but not a specific location, a description of the pending request is provided. This is applicable for pending requests that apply to a service agreement. This can include requests such as enrolling in payment arrangement or charitable contribution programs, overpayment refunds, starting service deposit requests, and so on. The applicable requests depend on which requests are defined in the system as related to service agreements. These types of requests that are not tied to a specific location can also be hidden from the pending requests location, as described in the [Oracle Utilities Opower Digital Self Service - Transactions Configuration Guide](#).

- **Service:** The type of utility service for the request, such as electricity or water.
- **Date of Change:** The date for the service change to be enacted.
- **Service Agreement:** The ID for the applicable service agreement

Service Appointments

Digital Self Service - Transactions allows customers to schedule and manage appointments easily and effectively through the self-service portal.

Service appointments

If you are experiencing a gas leak, fire on pole, or pipeline break, immediately call our emergency number at (555) 555-5555. Some services we provide can be requested online. You will find requested appointments you received by letter or phone here.

At the time of the appointment, an adult (over 18 years or older) must be present to complete this service request.

If you're trying to start, stop, or transfer your service, get started [here](#).

SCHEDULE APPOINTMENT

Need to schedule

You don't have appointments you need to schedule right now.

Upcoming appointments

SERVICE REQUEST	ADDRESS	SERVICE	APPOINTMENT	REFERENCE ID	
Trim Tree	7489-A Demo St., Alameda, CA 94501	Electric (Meter ID: E-SMART-89428)	03/14/2023, 1PM - 3PM	85222732190868	Edit

Scheduling Appointments

Customers are able to self-serve scheduling appointments related to their utility services. This includes creating and scheduling new appointments such as a meter read or to trim a tree. Customers can also assign a schedule for appointments created to their accounts such as initial start service appointments.

Creating New Appointments

Existing customers can schedule service appointments, such as requesting a meter read or requesting a hazardous tree to be trimmed, using the general workflow described

below:


1. **Access Site:** Customers access the service appointments process through the Digital Self Service - Transactions web portal. Customers must log in to their accounts, and from the **Service Appointments** area, select **Schedule Appointment**.
2. **Service Address:** The premise address is populated for the customer based on their account. If a customer has multiple premises associated with their account, a premise selector is displayed to select the appropriate premise for the service appointment.
3. **Service Point:** If a customer has multiple service points associated with a premise, customers select the service point that is relevant to the appointment.
4. **Service Request:** Customers select the service they need performed at their premise from the options available.
5. **Date and Time:** Customers select a date and time from the available options that are suitable for them.
6. **Review and Submit:** All information about the service appointment provided by the customer is displayed for review. Customers can edit any information that is incorrect. An example of this is shown below.

Schedule appointment

If you are experiencing a gas leak, fire on pole, or pipeline break, immediately call our emergency number at (555) 555-5555.

Premise

7489-A Demo St., Alameda, CA 94501

 Electric (Meter ID: E-SMART-89428)

Service request

[Edit](#)

Read Meter

Date and time

[Edit](#)

03/16/2023 | 10AM - 12PM

Submit



At the time of the appointment, an adult (over 18 years or older) must be present to complete this service request.



I agree to the [terms and conditions](#).

SUBMIT

[Exit appointment scheduling](#)

Upon submitting the service appointment the service appointment is created. This service appointment is then included in their upcoming appointments, as described in "Upcoming Appointments" on page 33.

Assigning a Schedule to Appointments

Customer viewing the Service Appointments area can review a list of **Need to Schedule** appointments. This list includes appointments that are created for the customer's account but do not yet have a scheduled time. There are various scenarios that cause these appointments to be created. For example, a customer starting service can receive an appointment for installing a meter or turning on service.

From the list of appointments that a customer needs to schedule, a customer can select **Schedule** to assign a schedule for the appointment. For some appointments, a customer can choose the date and time that is suitable for them. For appointments related to start, stop, or transfer service, customers are only able to select the time for the appointment. To update the date for start, stop, or transfer service appointments, customers must contact the customer call center.

Upon assigning a schedule for a service appointment, it is then included in their upcoming appointments, as described in "Upcoming Appointments" on page 33.

Upcoming Appointments

All scheduled appointments for a customer's account that are not yet completed are displayed in the list of Upcoming Appointments. A customer can use this list to quickly review important pending appointment information such as the type of service request, the applicable address for the service, and the appointment date and time.

Customers can also select **Edit** for an upcoming appointment to modify the appointment. This can include updating the date and time for the scheduled appointment, or selecting to cancel the appointment, as shown below. Cancelled appointments are removed from a customer's list of upcoming appointments.


Appointment details

If you need to change the premise or service reason for this appointment, please call us at (555) 555-5555.

Reference ID: 85222732190868

Premise

7489-A Demo St., Alameda, CA 94501

 Electric (Meter ID: E-SMART-89428)

Service request

Trim Tree

Date and time

[Edit](#)

03/14/2023 | 1PM - 3PM



At the time of the appointment, an adult (over 18 years or older) must be present to complete this service request.

CANCEL APPOINTMENT

DONE

Manage Web Account

Customers can view their web account information and connected accounts. Customers can also add utility accounts they want to manage online, remove accounts, or invite guests to their accounts if they have permission to invite guests. Changes to the web login details and account details are applied to all accounts linked to that login. Users cannot maintain separate web login details for different accounts under the same login.

Note: Digital Self Service - Transactions provides a view of a customer's web account information. The utility must provide and support the work-flows through configuration of an identity management system for customers to update their web account information.

The screenshot shows a web interface titled "Manage web login and connected utility accounts". Below the title is a subtitle: "Update your web login information and add or remove utility accounts you would like to manage online." The interface is divided into two main sections: "Web login details" and "Connected accounts".

Web login details

Name	Multi Account	Edit
Email	multi_account@oracle.com	Edit
Username	multi_account@oracle.com	
Password	*****	Edit

Connected accounts [+ Connect new account](#)

Multi1	Unlink Account
12345 sanity-01, OH, 12345	
Account # 2562882254	
+ Add guest user	
Restricted	Unlink Account
6203-A Demo St., Uniontown, OH, 44001	
Account # 3284234335	
+ Add guest user	

Web Login Details

Customers can view the information they provided when they created their web account, including their first name, last name, login username or email address, and edit their password:

- If authentication is configured using Oracle Cloud Infrastructure Identity and Access Management, customers can select the **Edit** password option to change their name, email, and password directly within Digital Self Service - Transactions. Edit email is only available when a utility requires customers to register with a separate username and email address.

- If authentication is configured using Oracle Cloud Infrastructure Identity and Access Management and utilities support multiple usernames associated with a single email address, customers can select the Edit email option to change their email address directly within Digital Self Service - Transactions.
- If authentication is configured using a third-party identity provider, an **Edit email and password** option is provided, which redirects the customer to an external site to change their credentials as required by the third-party identity provider.

Connected Accounts

Customers might have multiple utility accounts linked to their web login for Digital Self Service - Transactions. Each utility account has a nickname, account ID, and address. A **Premises** expand displays additional addresses for utility accounts with multiple addresses.

Customers can connect new accounts to their web login. This is a common task when starting a new utility service (see "Start, Stop, and Transfer Service" on page 21). By default, only the main customer can be linked to the utility account online. To give other web users access to the utility account, the main customer must invite guests to connect to the account. The following information is required when connecting an account:

- **Account Number:** The account ID for the utility account.
- **Customer Identification:** The identifying information for a customer, as defined by the utility, such as a social security number, driver's license, or phone number.
- **Account Nickname:** A descriptive name for the account such as "Home."

After an account is created and linked to the web login, only the account name can be changed for an account. A user can unlink an account from their web login at any time.

Guest Users

For any connected account a customer can **Add guest users**. Guest users can access the utility account with a level of access lower than what is provided to the primary account holder. When selecting this option, the customer is prompted to provide the guest user's first name, last name, and email address. The email address provided is used to send the user an invitation email to accept the guest user access. The customer adding a guest user must also define the level of access to grant to the guest user. Utilities must provide the roles that are available for assignment to guest users and the access that each role is granted. For more information, see the [Oracle Utilities Opower Digital Self Service - Transactions Configuration Guide](#).

Note: Digital Self Service - Transactions can be configured to allow main account holders to add guest users to an account and not need to collect personally identifiable information if the guest user is defined as not financially responsible for the account. For guest users that are not financially responsible for the account, a more minimal set of information, including an email address is required to add them to the account.

The main account holder can expand **Guest Users** to view the list of guest users included on a utility account. Full guest user management is available including the options to review what actions the guest user can take given their access level, change the guest user's access level, remove the guest user, and revoke a pending guest user invitation. The list of guest users is not available if there are no guest users or pending guest user invitations for an account.

Guest user invitations do not expire. If the guest has an existing web login with the utility, an invitation notification is displayed upon logging in to their account. If the guest does not have an existing web login with the utility, they are prompted to create a web login when attempting to accept the invitation from the invitation email. When a guest accepts an invitation to a utility account, the account holder receives a confirmation email. Customers can revoke a pending invitation or remove a guest user at any time.

Customers can review the list of utility accounts that they have been granted guest access to by reviewing the list of **Accounts you are a guest on**. Each guest account link describes the role for their guest access and the types of actions that the role allows them to perform for the utility account.

Note: If a guest user has been given permissions to enroll in utility programs, the guest user can view the account's current enrollment status for various programs. For paperless billing, the guest user can individually enroll in paperless billing, and this enrollment does not impact the paperless billing enrollment for the primary account holder. All other program enrollment for the main account holder and guest users are synchronized.

A customer can choose to unlink their account to no longer have guest access to the account. This list is not displayed if the customer is not a guest on any other accounts.

Data Browser

The Data Browser is an interactive tool that allows customers to visualize and explore their energy use trends and costs, and make comparisons to useful benchmarks, such as

weather and similar homes. One or more views for [Energy Costs](#), [Energy Use](#), [Water and Wastewater](#), [Demand](#), and [Neighbors](#) are available in the feature. If applicable, customers can also use menus to switch between multiple accounts or service points.

Requirements

Utility Requirements

Same as listed in the [product-wide requirements](#).

Customer Requirements

Category	Description
Billing Frequency	Monthly, bi-monthly, and quarterly.
Data Delivery Frequency	Monthly, bi-monthly, and quarterly.
Data Requirements	<p>Billing Data: Customers must have a minimum of one historical bill to view data in the Year view.</p> <p>Weather Data: Weather data is required for the weather line graph to display.</p> <p>AMI Data: The Digital Self Service - Energy Management AMI cloud service must be purchased for daily or subdaily energy use AMI data and insights to display. A minimum of one historical bill with at least one day of historical AMI data is required to view such data.</p> <p>Rates Data: The Rates Engagement cloud service must be purchased and rates must be modeled in order for rates or cost insights to display in certain parts of the Energy Costs View.</p>
Data History	<p>A minimum of one historical bill is required for data to display in the Year view.</p> <p>For AMI customers, a minimum of one historical bill which includes at least one day of historical AMI data is required for the Bill view and Day view.</p>

Category	Description
Data Coverage	Not applicable. By default, all graphs and views of the Data Browser display any data that is available, even if some reads are missing.
Supported Fuels	Electricity, gas, and dual fuel. Customers with two fuels can switch between electricity and natural gas views. A combined view, which combines electricity and natural gas use, can also be enabled. Customers must have water or wastewater service to view water or wastewater costs and use, respectively.

Limitations

- **Taxes and Fees Limitation:** The amounts shown for energy use typically do not include taxes or fees, so they will not match the customer's bill. However, with additional setup and configuration, the costs can be made to match a customer's bill. [Contact your Delivery Team](#) for more information.
- **Water and Wastewater Amounts:** The amounts shown for water or wastewater costs and use are based on the cost and use values, respectively, and sent to Oracle Utilities in the [billing data transfer specification](#) without any additional calculations on the values.
- **Water Customers in Neighbors Graph:** The [Neighbors View](#) compares energy use for residential customers. It does not include a comparison of water or wastewater use or comparisons for non-residential customers.
- **Responsive Display:** Daily energy use can be displayed in 15 or 30-minute intervals for all customers with sub-hourly read data. When viewed on smaller screens such as for mobile devices, the responsive design displays hourly intervals to account for reduced screen space.

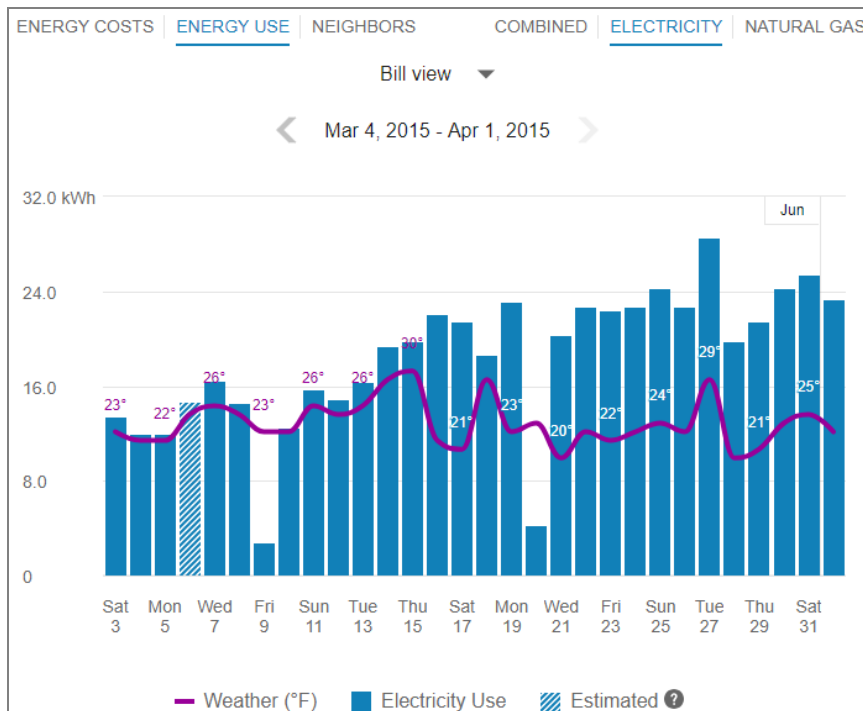
User Experience

The Data Browser is an interactive visualization tool that allows customers to analyze their energy use trends by fuel type, time period, and a series of other views. Customers can hover over or select a data point in the Data Browser to [see a tooltip](#) containing more information about it. The major views available are:

- [Energy Costs View](#): The cost of energy usage over time, alongside factors such as a weather and solar power (if applicable).

- [Energy Use View](#): The amount of energy usage over time, alongside factors such as a weather and solar power (if applicable).
- [Demand View](#): The demand (or rate) of energy consumption over time.
- [Usage Breakdown View](#): The top costs of energy by disaggregation categories over time.
- [Neighbors View](#): The amount of energy use compared between the customer and their neighbors.
- [Water and Wastewater Views](#): The amount and cost of water usage over time.

The image below is an example of the Energy Use view.



Depending on what data is available, each of these views presents different kinds of trends and insights at varying levels of granularity over time:

- **Year view**: Energy cost or usage by each bill period in a year. Monthly, bi-monthly, and quarterly bills are supported.
- **Bill view**: Energy cost or usage by each day in a bill period, as well as the day with the highest demand.
- **Day view**: Energy cost, usage, or demand by each hour of a day, as well as the interval with the highest demand.

For more information on how the feature behaves and displays data, see [General Display Rules](#) below. Some insights may not be available depending on data availability and the customer's fuel type.

General Display Rules

The Data Browser follows some general rules regarding when and how to display data. These rules vary depending on the view.

Year View

Rules for the Year view include:

- For all major views (Energy Costs, Energy Use, and so on), the Year view will always display any available data, even if some data is missing. For example, if 12 out of 13 months are missing data, the Data Browser will still show data for the one month that is available.
- Energy use and cost data for a bill must be sent to Oracle Utilities Opower for the same billing period. For example, if a customer has quarterly bills, the utility cannot send monthly energy use data, and then later send the total cost of the customer's bill at the end of the quarter. Both the total usage and cost of the quarter must be sent together in order for it to display it in the Year view of the Data Browser.
- Data points are always shown for a full year plus one additional data point. This means that there are 13 data points for monthly billing, 7 data points for bi-monthly billing, and 5 data points for quarterly billing.

Bill View

Daily AMI data is required to display the Bill view. In general, the Bill view will display any available data, even if some data is missing. For example, if only four days of data are available, the Data Browser will still show data for those four days.

Day View

Subdaily AMI data is required to display the Day view. Data reads are shown by hour or by whatever time interval matches the customer's AMI meter. The supported intervals are 60-minute, 30-minute, and 15-minute.

For the Energy Costs and Energy Use graphs, the Day view will always display any available data, even if some data is missing. For example, if only five hours of data is available, data for those five hours will be shown. Since 24 hours in a day can be assumed, missing data is shown as gaps in the graph.

High and low temperatures are not displayed in the tooltips for the Day view. However, average hourly temperature data will be displayed if it is available.

X-Y Axis

The Data Browser displays data in the form of lines, bars, and data points along an X-Y axis. Customers can hover over a given data point for more information and see a [tooltip](#)

containing standard details such as a date range, energy use amount, and other information depending on the view selected.

X-Axis

The labels on the X-axis of the graph represent an interval of time (months, days, or hours).

View	Display Rules
Year view	<p>The abbreviated month and final day for each bill is displayed.</p> <p>For example, if a customer is billed monthly on the 20th of every month, the label for September is Sep 20. This ensures that if more than one bill ends in a given month, each bill can be distinguished by the day information.</p> <p>Labels appear across the X-axis for every bill. Labels are hidden in a manner to ensure that labels do not overlap for reduced screen sizes. For example, labels can be displayed for every other bill when a browser window is reduced.</p>
Bill view	<p>The abbreviated day of the week and numeric day for each daily read is displayed.</p> <p>Labels appear across the X-axis for every other day. Labels are hidden in a manner to ensure that labels do not overlap for reduced screen sizes. For example, labels can be displayed for every third bill when viewing area is reduced due to viewing the graph on a mobile device.</p>
Day view	<p>Time of day intervals are displayed, such as 12am, 6am, 12pm, and so on.</p> <p>Labels appear across the X-axis for every six hours. Labels are hidden in a manner to ensure that labels do not overlap for reduced screen sizes. For example, labels can be displayed for every twelfth hour when viewing area is reduced due to viewing the graph on a mobile device.</p>

Y-Axis


The labels on the Y-axis of the graph represent an applicable unit of consumption, cost, or demand. The axis begins at 0 and displays increments up until an applicable maximum value that ensures all data can be shown.

Estimated Bills and Usage Reads

Utilities are sometimes unable to obtain billing reads or AMI usage reads for their customers, in which case such bills or reads may be estimated.

- **Estimated Bills:** An estimated bill is an approximate monetary amount that is calculated based on the energy that a customer has consumed in the past rather than the present billing period. Estimated billing reads are marked in the data file sent by the utility to Oracle Utilities Opower. Estimated bills are corrected the next time the customer's meter is read. Any extra costs they were charged will be adjusted in the following bill, ensuring that customers never pay for more energy than they actually used.
- **Estimated AMI Reads:** An estimated AMI read (that is, granular usage reads such as daily or subdaily reads) is an approximate usage amount that is calculated based on the energy that a customer that has consumed in the past rather than in the present billing period. Like estimated bills, estimated AMI reads are marked in the data file sent by the utility to Oracle Utilities Opower.

In the Data Browser, estimated bills or AMI reads are indicated by a tooltip message that displays when the customer hovers over an applicable data point. This message will appear if any bill or usage read shown in the Data Browser was estimated. For example, a single bill period could be estimated or a single day could contain three hourly reads which are estimated.

 This bill was estimated.

Cost	\$49.80
Weather (°F)	24° / H 32° / L 2°

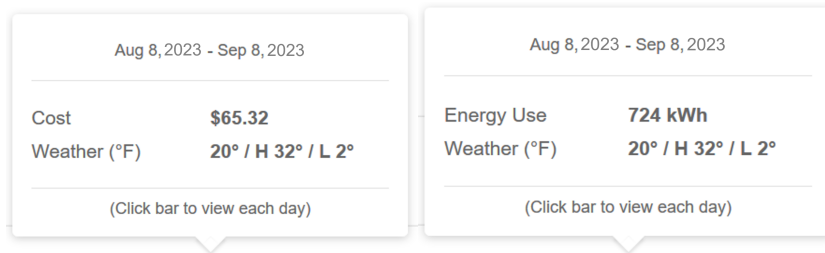
(Click bar to view each day)

Note: Estimated bills and AMI reads are flagged separately in the data files sent by the utility to Oracle Utilities Opower. If a utility has not marked that a billing read was estimated, then no indication of an estimated bill will be displayed for any of the bill periods shown in the Year view of the Data Browser—even if one of the billing periods contains one or more *daily* estimated AMI reads.

Energy Tooltips

A tooltip is displayed when a customer interacts with a data point in the Data Browser. At minimum, the tooltip includes the time period covered and the amount of energy used by

the customer. Other elements of a tooltip vary depending on which view of the Data Browser is selected and what data is available.



Time Period: The time period for the selected data point. The information shown varies slightly depending on the interval of time being viewed.

- **Year View:** The tooltip shows the month and date range of a bill period. Example: May 3, 2020 - June 1, 2020
- **Bill View:** The tooltip shows details about a day in a bill period. Example: Thurs, May 8, 2020
- **Day View:** The tooltip shows an hourly or sub-hourly interval in a bill period. Example: 9:00 - 10:00am

Energy Cost: The cost of energy for the selected fuel type and time period. Energy costs are shown on tooltips for the Energy Costs graph. Hyphens are displayed for any data that is missing. The cost amounts typically do not include taxes and fees, and so do not match a customer's bill. However, with additional setup and configuration, the costs can be made to match a customer's bill. [Contact your Delivery Team](#) if you have any questions about this configuration.

Energy Use: The energy used for the selected fuel type (kWh, therms, and so on) and time period. Hyphens are displayed for any data that is missing.

End-Use Category: In the [Usage Breakdown](#) view, the tooltip shows the customer's top categories of energy use and associated costs for a given bill period. All other fields are hidden from the tooltip. If a customer chooses to view a single category, the tooltip adjusts to show the cost of the selected category and the cost of all other categories.

Energy Insight: In the [Neighbors](#) view, the energy tooltip provides insight into the customer's energy use for the applicable time period as compared to their neighbors. For example, the tooltip may show that a customer used more, less, or about the same as their neighbors.

Weather: The average temperature for the selected time period. Weather data is available in the [Energy Costs](#) and [Energy Use](#) views. High and low temperatures are also provided when using the Year view or Bill view.

Click Bar to View Each Day or Hour: For customers with AMI data, a message is displayed in tooltips in the year view and bill view, directing customers to more granular data. This message allows customers to quickly view data for the days in a bill period or the hours in a day.

Estimated Bills: Estimated bills are listed as estimates in a tooltip. When unusual circumstances prevent a utility from obtaining an actual billing read for a customer, it is sometimes necessary to calculate an estimate. See [Estimated Bills and Usage Reads](#) above for details.

Virtual Bills

A virtual bill shows a business customer's daily energy use and energy costs up to the present day in the Data Browser, even though the bill period is not finished yet. This is accomplished by determining the maximum number of days to display along the horizontal axis in the Bill view. This feature requires AMI data.

A virtual bill is useful because it assumes an end date for an in-progress bill, and it therefore allows daily usage data to be displayed in the Data Browser before the bill period is finished. Because of virtual bills, customers can go to the Bill view and navigate past their most recent bill period to see their daily usage data up to the present day.

Solar Data

The Data Browser supports solar data by displaying a customer's net energy usage in a given interval of time on the horizontal axis. (This may also be referred to as net energy metering, or NEM.) For example, if a customer has solar power and generates more energy than they consume, the Data Browser will show the customer's energy use as a credit or as a negative value. This data can be configured to display in different ways for a utility. See the [Energy Costs](#) view and [Energy Use](#) view for details.

Weather Data

Any weather data displayed in the feature is based on the geolocation (latitude and longitude coordinates) of the business customer. A weather service is used to select the closest weather station with weather data for the customer. This usually corresponds to the nearest airport station, usually within ~40 kilometers from the customer. Daily average temperatures are based on hourly temperatures.

Multiple Accounts

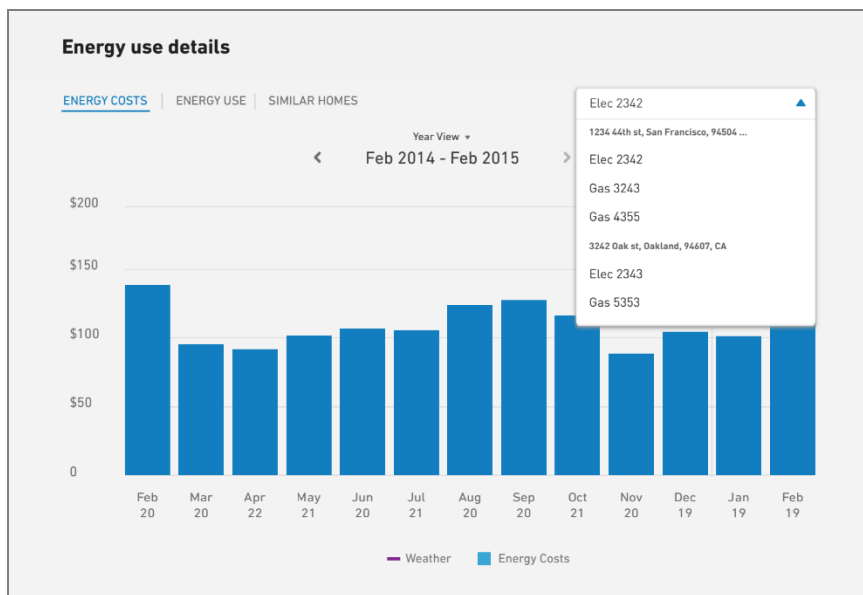
The multiple accounts experience varies depending on whether the feature has been configured for a standalone implementation or an embedded implementation.

In a standalone implementation, the Data Browser shows a drop-down list that allows customers to choose which account to view. The addresses in the list represent the available accounts.

In an embedded widget implementation, the account drop-down is hidden since the utility site is expected to have its own account selection tools. In this case, business customers can switch between their accounts by logging into their utility account using [single sign-on](#), and then clicking an account selector hosted on the utility website. All embedded widgets are then reloaded with data for the specified account.

Multiple Service Points

An account can include one or more service points. In such cases, the Data Browser displays a menu listing multiple accounts and service points for the customer to choose from. Customers can select a service point from the menu, but not the premise itself. The example below shows a customer with a standalone implementation that has multiple accounts and service points.



Missing Data

As discussed above, all available data is displayed in the Data Browser even if there is missing data.

For the [Year View](#) and [Day View](#), any missing bills, data reads, or weather data are displayed as missing data points on the graph. In the case of bar graphs, gaps will be shown for each interval of missing data. In the case of line graphs (such as the Neighbors View), a dotted line is displayed for the missing data point if the missing data is between other data points. If it is at the end, a gap will be shown with no line. The tooltips for these data points use hyphens in place of any missing data.

Customer Feedback

A customer feedback module can be displayed at the bottom of the Data Browser to collect input and inform ongoing improvements. See [Customer Feedback](#) for more information.

Green Button - Exporting Billing and AMI Data

The Green Button is a feature that allows customers to export their billing and energy use data. It is often located beneath the [Data Browser](#), but it can be embedded in other locations as well. Customers can export their data to CSV or XML formats by clicking **Green Button Download My Data**, which displays several download options.

All Bill Totals: The total bill costs for all available bills.

Bill Period Use: Energy or resource use for a bill period. A bill period can be selected from a drop-down list. Customers can also select **Since your last bill** to view costs and use that has not yet been included on a bill. By default, up to 30 days of in-progress billing data can be downloaded, which can be configured to align with the length of a customer's billing cycle.

Day Range Use: Energy or resource use for a range of days. A start and end date can be selected to define the range of days.

Download my data CLOSE

Time Period

Export all bill totals

Export usage for a bill period

Since your last bill: Dec 01, 2010 ▾

Export usage for a range of days

From: 11/30/2010 To: 12/31/2010

Format

CSV

XML

Downloaded File Contents: The data within the downloaded file includes the fuel or resource type, applicable dates, energy use and costs, energy units, and any applicable notes for each data point.

Note: Green Button supports the download of data in units of measure that are applicable for the customer's resource types. For information on the units of measure supported by Oracle Utilities, see the [Oracle Utilities Opower Premise Data Transfer specification](#).

Solar Data and Multi-Register Meters: The downloaded spreadsheet may have additional columns for customers with multi-register meters and solar technology. In such cases, the downloaded spreadsheet displays columns for IMPORT (energy consumed from the grid) and EXPORT (energy sent back to the grid).

Estimated Reads: If a customer has estimated reads, then this is indicated in the file that is downloaded. An estimated read is an approximate energy or resource use amount calculated based on what a customer has consumed in the past, rather than what the customer has consumed in the present billing period. The Notes column indicates any applicable estimates. Otherwise, the Notes column is left blank.

Your Utility Use

Digital Self Service - Energy Management features can be included to educate customers on their utility service usage and self-serve account actions. These features are highlighted directly as part of a customer's Your Utility Use tools or are included throughout the Digital Self Service - Transactions web portal, as described below. The following Digital Self Service - Energy Management components can be included as optional add-ons:

- Bill Comparison, which allows customers who are viewing their electricity, gas, water, or wastewater costs on the Overview dashboard and the Billing and Payment options to compare their costs to previous bills. This feature is highlighted as a "Billing and Payment" on page 10 tool.
- Bill Forecast, or Projected Bill, which shows customers their applicable, current electricity, gas, water, and wastewater use or cost so far in the billing period along with their projected use or cost for the billing period. A comparison to their typical use or cost for the period is also provided. This feature is highlighted as a "Billing and Payment" on page 10 tool.
- Energy Use Overview, which displays the most recent bill period's use in comparison to that of a bill from the same bill period for the previous year. This feature is hidden from the Your Utility Use tools by default, since it provides a similar user experience as the "Usage and Bill Trends " on page 8. To display this feature as a Your Utility Use tool, refer to the [Oracle Utilities Opower Digital Self Service - Transactions Configuration Guide](#).
- Frequently Asked Questions, which provides a list of questions and answers that customers often ask about their account and utility service.
- Highest Energy Use Days, which displays a calendar that highlights the top five days of the month in which a customer used the most energy for electric and gas. This insight helps customers identify patterns in their energy use. This feature is listed as a Your Utility Use tool.

- Home Energy Analysis, which guides customers through a survey to determine their home attributes and usage habits for electricity and gas use. This information is used to provide customers with a better understanding of how they use energy. This feature is listed as a Your Utility Use tool.
- Neighbor Comparison, compares residential customers to two groups based on their electricity and gas use: “Efficient Neighbors” and “Average Neighbors.” The results are displayed in a horizontal bar graph. This feature is listed as a Your Utility Use tool.
- Next Best Action, which provides dynamic and actionable web banners that can be shared with all customers or targeted to specific customer groups. The web banners guide customers to the most valuable opportunities or solutions available and helpful tools to help them manage energy use and cost. This feature is highlighted on the "Overview Dashboard" on page 7.
- Rate Compare, which allows customers to see an overview of rate plans for which they are eligible, estimated cost information, and details about each rate plan option. This feature is highlighted as a "Billing and Payment" on page 10 tool.
- Tips Light, which guides customers on the Overview dashboard to the Ways to Save costs saving tips. This feature is listed as a Your Utility Use tool and is also highlighted on the "Overview Dashboard" on page 7.
- Ways to Save, which presents costs saving tips for the customer to review and complete. This feature is listed as a Your Utility Use tool. In addition to the standard energy savings tips available with Digital Self Service - Energy Management Ways to Save, Digital Self Service - Transactions can include:
 - Water and wastewater savings tips for both indoor and outdoor water use, which are available for water and wastewater customers.
 - Energy savings tips that are applicable to commercial customers. All residential energy savings tips are also hidden for commercial customers.

In addition to these features, the Data Browser provides in-depth analysis of a customer's costs and use, and Green Button allows customers to export their billing data. These features are available directly with Digital Self Service - Transactions Cloud Service and are listed in the Your Utility Use tools as Usage Insights. For more information on these feature, see "Data Browser" on page 37 and "Green Button - Exporting Billing and AMI Data" on page 47.

See the [Oracle Utilities Opower Digital Self Service - Energy Management Cloud Service Product Overview](#) for more information.

Personalized Navigation

Personalized navigation ensures that a customer only sees the Digital Self Service - Energy Management features that relate to their services. For example, the Home Energy Analysis is hidden for customers who only receive water and wastewater service.

Outages

Customers have resources available to them when outages occur. Digital Self Service - Transactions provides self-service options to view and report outages, and review an Outage Map. These features include:

Requirements

Utility Requirements

- **Oracle Version Requirements:** Outage features require Customer to Meter 2.9.0.1.0 or higher or Customer Cloud Service 22C or higher.

Customer Requirements

Category	Description
Billing Frequency	Not applicable.
Data Delivery Frequency	Not applicable.
Data Requirements	Not applicable.
Data History	Not applicable.
Data Coverage	Not applicable.
Supported Fuels	Electricity or gas. Customers with two fuels can only view outages for the singular fuel type configured for Outages by the Utility.

My Outages

The Digital Self Service - Transactions My Outages feature provides customers with personalized information about the outages affecting their service addresses. Customers

are presented with a comprehensive view of the outage events that have a direct impact on them. This view provides critical information about the incident such as what caused the outage, work crews status, estimated restoration time, and when the outage was first reported.



When multiple service addresses are affected at once, detailed information is available for each outage impacting the customer.

Current account: Transformer T15017

My outages

See details of outages affecting your premises. To view all active outages, go to [Outage Map](#).

2 premise(s) with an outage.

 7489-A Demo St. CA 94501 3655460977	Estimated restoration Nov 17th, 01:42PM PST	Status New unacknowledged event	Cause Trouble Call	First reported Nov 1st, 02:18AM PDT
 7489-A Demo St. CA 94501 3655460977	Estimated restoration Nov 17th, 12:36PM PST	Status New unacknowledged event	Cause Non-outage	First reported Nov 16th, 05:45AM PST

Don't see your outage? [Report outage](#)

In addition to reviewing applicable outages, customers can select options to "Report Outages" on page 51 or view the [Outage Map](#).

Report Outages

Self-service options are available to the customer to report a problem or outage with their utility service. The service reporting options walk the customer through the process and collect information needed by utilities to efficiently troubleshoot outages.

What is the problem?



Outage at my serviced location



Outage in my community

Identifying an emergency

Do you smell gas, see downed power lines or suspect another emergency situation?

Leave the area immediately & call 911 or call UtilityCo at 1-800-UTIL-COS.

NEXT

Data Requirements and Limitations

- **Questions:** Utilities define the available questions using the Oracle Utilities Customer Information System and Outage Management system integration. This includes determining the outage group codes and characteristic types.

Reporting an Issue for Individual Service

Existing customers can report an issue that they are experiencing at their property or with the service they directly have with their utility. Customers can report their issue using the general workflow described below:

1. **Access Site:** Customers access the report issue process through the utility website and select the option to report an issue for their service. By default, customers are prompted to log in to their self-service web account or determine their utility account by a combination of configurable identifiers such as a primary phone number and social security number. This authentication ensures an outage is connected to the applicable account.
2. **Outage Details:** After a customer is authenticated, the customer provides the following information to report their issue:
 - **Service Address:** The account number and premise address are populated for the customer based on their account. If a customer has multiple premises associated with their account, an option is displayed to select the premises that

are experiencing the problem. If a customer attempts to report an issue for a premise that has an active issue reported, the existing issue is displayed to modify or cancel as described in "Modifying an Issue for Individual Service" on page 56.

- **Service Point:** If a customer has multiple service points associated with a premise, an option is displayed to select the service points that are experiencing the problem.
 - **Outage Information:** A list of inputs are presented to collect additional details from the customer about the outage. Inputs to explain the cause, description, and additional comments are displayed by default based on the Customer Information System or Network Management System integration.
 - **Troubleshooting Guide:** If configured, a troubleshooting guide is displayed to users when they try to report certain types of issues. For example, if the utility does not want to intake issues for partial power outages or blinking lights, the troubleshooting guide can be displayed when the customer selects these problem types. Troubleshooting steps can be provided to the customer for these types of outages. Customers cannot proceed with reporting the issue for the selected issue types when the troubleshooting guide is displayed.
3. **Contact Details:** Contact details are populated for the customer based on their account information. Customers can replace the pre-populated values with different information if, for example, they want the utility to call them back at a number that is not stored as a contact method on the account.
 4. **Review and Submit:** All information provided by the customer is displayed for review. Customers can return to previous pages to edit any information that is incorrect. An example of this screen is shown below.
 5. **Confirmation Notification:** Customers can also receive an email notification including the information they submitted to the utility as confirmation of their reporting the issue. To receive this notification, the customer must enter an email address in the Contact Details step. If no email is provided, no email is sent.

A Service Task is created upon successful submission and is linked to the account automatically.

Review the information you provided

Outage Details

Outage Type	Property outage
Premise	800 Clement St, CA 94103 Electric Residential - 1656639964
Problem Description	Area out
Cause Of Problem	Tree Limb on Wire
Description	Sagging Wire
Additional Information	N/A

Contact Information

Name	Maria
Callback Number	(555) 145-1445
Email	mariavilla@mymail.com

[BACK](#)[SUBMIT](#)

Enroll in Future Outage Notifications

When enabled, customers completing a personal outage issue can enroll in notifications related to outages. For example, customers can get estimated time of restoration notifications from their utility through email or SMS.



We received your outage report

Thanks for letting us know. We'll do our best to resolve the issue as quickly as possible.

Reference ID: 55971194336804

[ENROLL IN FUTURE OUTAGE ALERTS](#)

Customers are presented with email and SMS contact methods for receiving these notifications. The default values are based on the customer's account. A customer can choose to enter new contact information if, for example, they want to use a different SMS number for outage notifications.

Enroll in Future outage alerts

Receive future outage alerts

Notifications about planned and unplanned outages will include:

- Outage start time
- Estimated time to resolve
- Power restored

How would you like to receive alerts?

- SMS (cellular service plan rates apply)
- Email

Mobile Phone

(555) 145-1445

ENROLL

CANCEL

After customers complete their enrollment, a preference is set within the Customer Information System on the notification type configured. Customers can modify their enrollment in these notifications at any time by modifying the applicable billing communication preference, which are described in "Account Notifications" on page 62.

Note: This enrollment option is only displayed to customers who are not yet enrolled in the respective notification type.

Modifying an Issue for Individual Service

When a customer attempts to report an outage for a location has an active issue already reported, the system populates the form with the information that was previously submitted for the outage. If the power has been restored, the customer has the option to cancel the reported outage. Customers also have the option to edit information of the previously reported outage and resubmit the form.

Customers can also view existing outages from "My Outages" on page 50.

Reporting an Outage for a Community

When enabled, a publicly accessible option to report an outage for a community is available. For example, a concerned citizen can report a street light outage. No account details are collected or stored for this outage reporting:

1. **Access Site:** Customers or other users access the report issue process through the utility website and select the option to report an outage in the community.
2. **Issue Details:** After selecting to report a community issue, the user must provide the following information to report the community issue:
 - **Location:** The location fields including street, cross street, city, state, and zip help utilities locate where the problem is. The user's web browser prompts the user to allow detection of their location to include pertinent location information for them. If a user does not allow location detection, they can manually enter the location details while reporting the issue.
 - **Outage Information:** A list of inputs are presented to collect additional details from the user about the outage. Inputs to explain the cause, description, and additional comments are displayed by default based on the Customer Information System or Network Management System integration.
3. **Contact Details:** Users may provide their contact information in case the utility needs additional details about their issue or to provide an update.
4. **Review and Submit:** All information provided by the customer is displayed for review. Customers can choose to edit any information that is incorrect by navigating backwards in the flow.

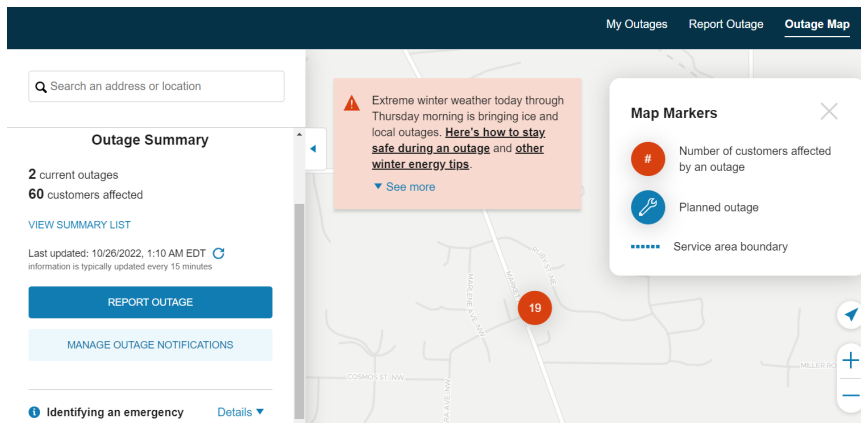
A Service Task is created upon successful submission. These service tasks are not tied to an account since they can be reported by customers or other users who do not have an account with the Utility.

Outage Map

The Outage Map provides information on all outage events affecting the service territory. The outage information is depicted in different ways to attend to all the customer needs:

- Individual Outage Details
- Service Territory aggregated view
- County or City aggregated view

The Outage Map is publicly accessible and does not require viewers to have an account with the utility. A web portal account is required for a customer to use the outage map to verify if there is an outage affecting one of their properties.



Data Requirements and Limitations

- Outage Map Integration:** The utility must configure and integrate an outage management system with their customer integrated system to provide issue information to the Outage Map. Oracle Utilities recommends integrating with Oracle Utilities Network Management System to support the Outage Map.

Outage Summary

The outage summary view allows customers to quickly assess how their service territory is affected. Customers can view the total number of outages for the territory, the number of customers affected, and the date and time the data displayed on the map was last updated. From this view, customers can report an outage and manage outage notifications. From this view, customers can view to list of outages or select a specific outage to view more details about the particular outage.

Outage Details

When a customer selects an outage on the map, additional detailed information about the outage is displayed. This information can include the estimated restoration time for the outage, the status of the outage, the root cause, and when the outage was first reported. An option for customers to report an outage is also available within this view.

Outage List

Customers can review an aggregated list of outages by county or zip code, along with the number of customers impacted in each area. This provides high-level information related to current outages.

Alert Banners

Alert banners provide customers with important information during critical events. By displaying an attention-grabbing banner on the outage map, customers can quickly

access important messages related to the weather conditions, safety precautions, and restoration progress. Customers can benefit from easy access to additional materials, such as safety guides, preparedness tips, or instructional videos. An example alert banner which can be displayed as an overlay on the outage map is shown in the outage map example above.

Notifications

Customers can review and modify their notifications, alerts, and communications for their account, as well as define the contact methods for each applicable communication. Digital Self Service - Transactions supports a wide variety of notifications that can be viewed by a customer when they sign in to their account or sent to contacts that the customer creates.

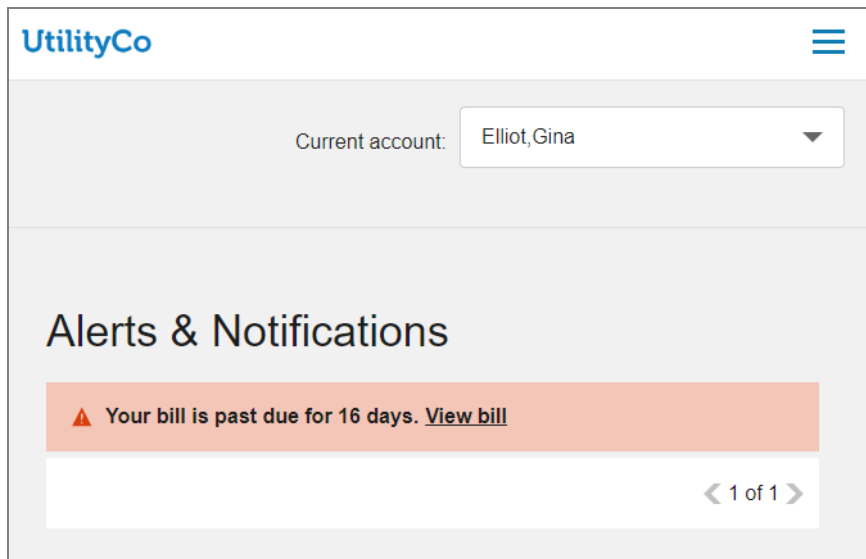
Note: Customers can select their account using the **Current account** drop-down list. For more information, see "Account Selector" on page 7.

User Experience

Alerts and Notifications

Customers are presented with important alerts and notifications about their account in the Overview Dashboard and the Notification Center. Critical information, referred to as alerts, are displayed directly on the Overview Dashboard, and customers can scroll through all critical alerts. The Overview Dashboard also displays a single item for non-critical notifications. Customers with more than one non-critical notification see a summary of notifications on the Overview Dashboard with the total number of non-critical notifications, along with a link to the Notification Center to view all alerts and notifications.

All active alerts and notifications are available to customers in the Notification Center. Alerts and notifications cover areas such as payments, billing information, account status updates, and guest user invitations. A message is displayed for customers that have no active alerts or notifications.



Payment Status Alerts and Notifications

Customers receive alerts and notifications for status updates to recent payments, including:

- Payment received
- Payment scheduled
- Payment failed
- Payment rejected
- Scheduled payment canceled
- Payment submitted
- Automatic payment received
- Automatic payment failed
- Automatic payment rejected
- Automatic payment submitted

Bill Due Alerts and Notifications

Customers receive alerts and notifications for their bills, including:

- Bill past due
- Bill due in future
- Bill due today

Account Status Alerts

Customers receive alerts for critical account status updates, commonly as a result of unpaid bills, including:

- Service will be suspended
- Service suspended
- Service restored

Guest User Invitations

Customers receive notifications when there is a pending guest user invitation waiting for the guest user to accept.

General Announcements

General announcements are vital messages presented to customers directly on the portal's Overview Dashboard. These messages can encompass a wide range of information, from critical notifications such as widespread power outages or impending severe weather conditions, to informative updates about scheduled maintenance on the portal or exciting new rebate and promotion programs. Urgent alerts, such as emergency situations, are given top priority and appear prominently at the beginning of the notifications list, ensuring that customers stay informed about essential information directly within the portal. More informative general announcements can be defined as non-urgent and displayed alongside other notifications without heightened priority. The image below provides an example of urgent and non-urgent general announcement banners.

Note: For information on configuring general announcements, see the [Oracle Utilities Opower Digital Self Service - Transactions Configuration Guide](#)

UtilityCo

Logged in as Sabela | [Logout](#) | [Manage Web Account](#) | [English](#) ▼ | [Contact Us](#)

Overview | Billing and Payment | Start / Stop Service | Your Utility Use | Outages | Notifications | ☰

Alerts:

- We are currently experiencing higher than normal call volumes. For a quicker response you can try [contacting us online](#)
- Connect to our latest updates and offers. [Explore how we can serve you better](#)

Hello Sabela Williams | Current account: Home ▼

No payment due

\$0.00

You have a scheduled payment of \$2.00 for Apr 25. [View details](#)

[VIEW BILL](#) [MAKE ADDITIONAL PAYMENT](#)

Your account #3581063386
123 Pine St, San Francisco, CA

[Paperless Billing](#) Not enrolled

[Auto Pay](#) Not enrolled

[Budget Billing](#) Not enrolled

[Payment Arrangement](#) Not enrolled

Account Notifications

The members of a utility account with the required permissions can set their account notification preferences, including:

- "Contact Methods" on page 63
- "Bill Delivery" on page 64
- "Notification Preferences" on page 64

Note: All modifications are made for the utility account and not the web login. Customers can have different settings for each of their accounts by selecting the account they want to modify from the account drop down list.

Alerts and notifications **Manage Account Notifications** Energy Use

Manage account notifications

Contact methods

🏠 (322) 543-6545 Primary	Remove Edit
✉ test@test.com Primary	Remove Edit
📱 (111) 111-1111	Remove Edit

[+ Add contact method](#)

Bill Delivery

Mailing Address	500 Guerrero St 45 San Francisco CA, 94103	Edit
-----------------	--	----------------------

[Enroll in paperless billing](#)

Notification preferences

Manage how you would like to receive alerts and notifications. Standard notifications require at least one contact.

- Service Advisory
- Bill Due**
 DAYS BEFORE

 Send to (111) 111-1111 [Remove](#)
[Add another contact method](#)
- Bill Ready
- Bill Routing Email
- Late Payment

Contact Methods

Contact methods provide delivery methods for outbound account notifications. A minimum of one primary contact method is required for each contact type that a customer has saved for their account. For example, if a customer includes phone number contacts for their utility account, one phone number must be defined as the primary phone contact. The primary contact methods cannot be deleted but can be modified.

Customers can add or delete contact methods from the contact list at any time. When deleting a contact method, any notification preferences assigned to a specific contact are also removed. If the deleted contact method was the only contact method set to receive

the utility bill through email, the bill is automatically sent to the primary email for the account.

Bill Delivery

Customers can choose to receive their bill through standard mail or through email. When a customer enrolls in paperless billing, the email address being used for delivery is shown, along with a link to unenroll. When the customer is sent bills through standard mail, a link is shown to allow customers to enroll in paperless billing. A customer's mailing address can be used for various utility communications in addition to bills and therefore a customer can update their mailing address regardless of their enrollment in paperless billing.

Notification Preferences

Notification preferences, as defined by the utility, can subscribe customers to account notifications. These preferences are used to enroll a customer in outbound notifications, which are sent directly to the contacts the customer selects for the respective notification. These notifications can complement the "Notifications" on page 59 that are displayed in the Notification Center. Common notifications can include:

- Bill is ready
- Bill is due
- Programs and offers
- Bill is past due
- Payment received
- Budget billing changes

Energy Use Communications

The account manager for a utility account can set their energy use communications and alerts using the following options:

Note: Energy use communications are part of the Digital Self Service - Energy Management features, and are an optional add-on, available through the Oracle Utilities Opower Digital Self Service - Energy Management Cloud Service. CSRs can make changes for customers directly through the Digital Self Service - Transactions portal by masquerading as the customer. For additional information on supporting the Digital Self Service - Energy Management feature functionality and requirements see the [Oracle Utilities Opower Customer Service Documentation](#).

- "Energy Use Communication Recipients" on page 65
- "Home Energy Reports" on page 66

- "Weekly Energy Updates" on page 66
- "High Usage Alerts" on page 66
- "Peak Pricing Alerts" on page 67

Note: All modifications are made at the utility account and not the web login. Customers can have different settings for each of their accounts by selecting the account they want to modify from the account drop down list.

Manage recipients and preferences
Create and edit contact details for recipients of your utility's communications and alerts.

Sonali Dujari Primary [Edit contact info](#)

foo@gmail.com (202) 555-9876

Message preferences [Details](#)

Weekly Energy Updates Email
Weekly updates on your energy use and ways to save.

High Bill Alerts Email SMS
Alerts that let you know if your energy use is higher than usual.

Peak Pricing Alerts Email SMS
Notifications about upcoming Energy Savings Days.

Rate Coach Emails Email SMS
Weekly emails that help you track your energy use during peak hours.

Energy Use Communication Recipients

Energy use communications can be sent to any recipient. The Message Preferences section is displayed once for each recipient on the account, and provides a list of the available communications and alerts that the recipient can receive. This section of the widget can be expanded or collapsed by clicking Details.

The products and channels that are displayed for each recipient depend on:

- The products and reports that are available from the utility.
- The communication types included for the recipient. For example, do they have both an email and a phone number?
- Whether the recipient is the primary recipient on the account.

Each applicable channel can then be selected or cleared for each recipient of a product. Printed reports can be sent only to the mailing address for the primary account recipient. Additional recipients cannot select printed reports.

Note: Recipients are different than the contact methods used for billing communications. If the same contact information should be used for both billing and energy use communications, an applicable contact method and recipient must both be created.

Behavioral Load Shaping

This section, which might also be called Rate Coach Emails, controls whether a customer receives Behavioral Load Shaping email communications. Behavioral Load Shaping communications are only available for the email channel. For more information, see the [Oracle Utilities Opower Behavioral Load Shaping Cloud Service Product Overview](#).

Home Energy Reports

Home Energy Reports are user-friendly communications that provide personalized information to customers about their energy use. Customers can choose to receive HERs through standard mail or email. Home Energy Reports sent through standard mail can only be sent to the primary mailing address for the utility account. For more information on Home Energy Reports, see the [Oracle Utilities Opower Energy Efficiency Cloud Service Product Overview](#).

Weekly Energy Updates

Weekly Energy Updates are email notifications that compare the energy use for a premise to that of similar neighbors. For more information on Weekly Energy Updates, see the [Oracle Utilities Opower Proactive Alerts Cloud Service Product Overview](#).

High Usage Alerts

High usage alerts are digital communications sent through email, SMS, and voice to inform customers when they are expected to receive a higher energy bill.

A personalized alert threshold is available to customers who have High Bill Alerts AMI. For information on the applicable Cloud Service, see the [Oracle Utilities Opower Proactive Alerts Cloud Service Product Overview](#). Depending on the characteristics of a customer's accounts, the customer is provided one of the following options to define an alert threshold:

- **Cost threshold:** The cost threshold allows customers to specify a dollar amount as their personalized threshold. When the cost threshold is set, the customer will only receive a high bill alert when their cost exceeds the cost threshold. All active utility accounts for a customer must have modeled rates and are not defined as budget

billing accounts for the customer to define a cost-based threshold.

If a customer does not set their personalized threshold, they will only receive high bill alerts when they exceed the combined usage and cost threshold set by the utility. The recommended combined threshold is 30 percent.

- **Usage threshold:** The usage threshold allows the customer to set a percentage-based personalized threshold. When the usage threshold is set, the customer will only receive an alert when their energy use exceeds that threshold for the same billing period the previous year. The default usage threshold is 30 percent. The usage-based threshold is available to customers who are ineligible to define a cost-based threshold. This applies to customers with at least one active account without modeled rates or defined as a budget billing account.

Peak Pricing Alerts

Peak pricing alerts are digital communications sent through email, SMS, and voice to inform customers of peak pricing events. Customers can receive either Peak Time Rebate or Behavioral Demand Response communications. For more information on the applicable Cloud Services, see the [Oracle Utilities Opower Behavioral Demand Response Cloud Service Product Overview](#) and the [Oracle Utilities Opower Peak Time Rebates Cloud Service Product Overview](#).

Outage

Outages are a main reason for customers to log in to their utility account or contact their utility's customer service. Depending on the implementation, customers are presented with information and options to receive outage notifications.

Integration with Customer Care and Billing

Using the Customer Care and Billing outage notification integration presents outage notifications along with other notification preferences:

Notification preferences

Manage how you would like to receive alerts and notifications. Standard notifications require at least one contact.



Service Advisory

Send to (111) 111-1111 [Edit](#)

[Add another contact method](#)



This notification is standard and requires at least one contact.



Bill Due

DAYS BEFORE

Send to (111) 111-1111 [Remove](#)

[Add another contact method](#)



Bill Ready



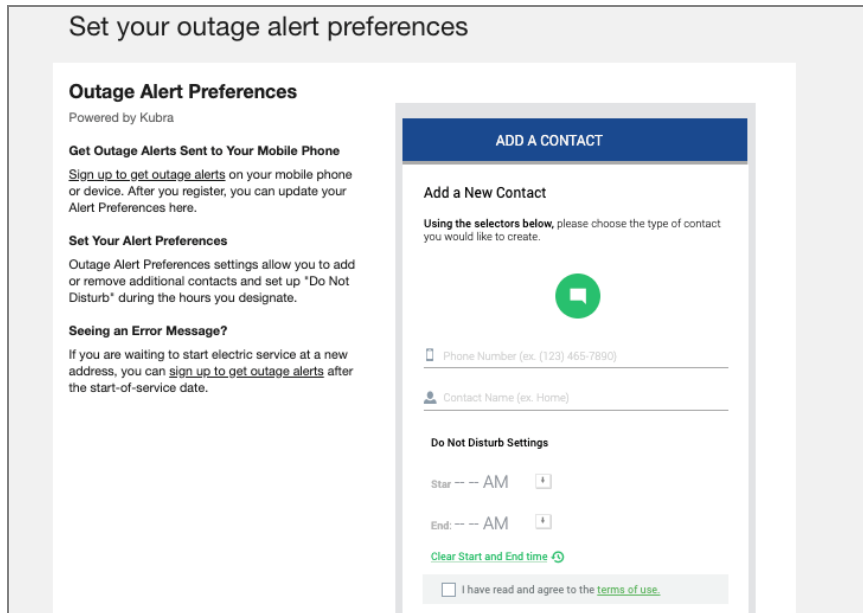
Bill Routing Email



Late Payment

Third-party Integration with Kubra

Customers can select the channels to receive outage alerts, such as mobile push alerts, text messages, email, or automated phone calls. Contact information for each channel must be provided. Using Kubra's Notifi Alerts and Preferences Management integration presents outage notifications in a dedicated set of outage notification preferences:



User Experience Variations

Customers Enrolled in Payment Extensions

Alerts related to the due date of a customer's bill are impacted when a customer enrolls in payment extensions. When a customer enrolls in payment extensions, past due notifications are hidden for the customer. Alerts that relate to the due date such as Bill due today and Bill due in future are modified to reflect the due date of the payment extension.

Help Center

The help center provides customers with options to answer questions they have about their utility bill or service. Customers can also act on common customer tasks.

Ask a Question

Customers can ask questions to receive information and guidance on their specific needs. Categories are available to guide customers to provide the required information for their questions. Attachments can be included with a customer's question to provide additional information, such as a picture of a broken meter or an image of an issue they are having with their online utility account. Supported attachment file types and file size limits are defined by the utility. Attachments are accessible by Customer Service Representatives from the service task that is created when a customer submits a question and attachment.

A customer's full question history, including any responses from the utility, is available from the help center. Customers can view their resolved questions and respond to any of their pending questions with follow up information.

Ask us a question

Select a topic ▼

Enter your question. If this is about a specific account or property, please include the account number or address.

[+ Attach file or photo](#)

[View your question history.](#)

Do it Yourself Online

Customers looking to complete certain tasks can review the available actions they can do online. This list highlights features available with Digital Self Service - Transactions that customers can complete themselves. The highlighted actions include common tasks such as enrolling in billing programs including autopay and paperless billing, starting or stopping service, updating account information, or viewing and reporting service outages.

Do it yourself online

Billing & Payments	Service & Accounts
Sign up for Auto-Pay	Start, stop, or transfer service
Sign up for Paperless Billing	Update your contact info
Sign up for Balanced Bills	Update your password
Set up a Payment Arrangement	

Contact Support

Applicable phone, email, and mail support contact information is available to customers.

Chat for Customer Support

Chat services can be integrated with Digital Self Service - Transactions to allow customers and utilities to communicate in real time in a chat channel. This feature helps

utilities adapt their customer service in order to meet their customer's expectations, and brings additional benefits including increased customer satisfaction and revenue.

Genesys chat service is a third-party service that requires a separate service agreement and contracting. Digital Self Service - Transactions can seamlessly work with Genesys and provide clients the option to offer their customers chat services.

The image shows a 'Live Chat' interface. At the top left is a red speech bubble icon with three horizontal lines, followed by the text 'Live Chat'. To the right are a minus sign and an 'X' icon. Below this is a form with the following fields:

- First Name:** Carlos
- Last Name:** Salazar
- Email:** carlos.salazarcoffee20@gmail.com
- Account #:** 0729463461
- Service Type:** Commercial (dropdown menu)
- Language:** English (dropdown menu)

At the bottom of the form are two buttons: a dark grey 'Cancel' button and a blue 'Start Chat' button. Below the buttons is the text 'Powered by GENESYS' with the Genesys logo.

Authentication

Authentication refers to the ways that a customer can securely access the Digital Self Service - Transactions web portal. Single sign-on (SSO) is the supported authentication method, and each utility can use a third-party identity provider or use Oracle's Identity Cloud Service. In addition, some CSRs may be able to access a customer's Digital Self Service - Transactions web portal accounts to help them troubleshoot issues they encounter.

Note: Since SSO credentials are maintained by the identity provider, customers cannot use the Account Center in the Digital Self Service - Transactions Web Portal to change their password.

Account Creation

The landing page of the Digital Self Service - Transactions web portal provides customers an option to create a new account. New customers are often directed to this landing page through communications.

Entering an Email and Password: A customer must provide an email and password for their new account. Passwords must meet the policy configured in the utility's identity provider. Depending on the utility's setup and configuration, the following additional password requirements may apply:

- Minimum number of digits
- Minimum number of special characters
- Minimum lower-case characters
- Minimum upper-case characters
- Must be different than previous password

Completing this step sends a confirmation email to the email address the customer supplied, which the customer then uses to verify the email address.

Account Sign In and Sign Out

Customers who have created their web account can use their web account email address and password to sign in from the landing page. A standard link is available throughout the Digital Self Service - Transactions Web Portal for signing out. By default, sessions timeout after 30 minutes of inactivity, at which point the user is automatically signed out.

Password Reset

Customers can request a password reset if they have forgotten their current password. To complete this process, a customer first selects the **Can't access your account?** option included with the account sign-in options. The customer is prompted to enter their web account email address, to which a reset password email is sent. The email includes a link that directs the customer to a reset your password page, which prompts the customer to create and confirm their new password.

Providing Customer Support

Customer Service Representatives (CSRs) with the proper permissions can use their Oracle Utilities product, such as Customer Care and Billing, to access the Digital Self Service - Transactions Web Portal. If you are unsure if your account has been granted the proper permissions to perform the support activities listed in this documentation, contact your supervisor.

Note: Digital Self Service - Energy Management features can be included as add on features to the Digital Self Service - Transactions web portal. Many of these features are provided as part of "Your Utility Use" on page 48. For customer support capabilities related to Digital Self Service - Energy Management features, see [Supporting Digital Self Service - Energy Management](#).

Finding a Customer's Account

Customers often have questions that can be easily answered by finding and accessing their account. When searching for customers, providing exact information such as name or account number can return a single result for the correct customer.

You can also perform customer searches with wildcards in place of exact values using the % character. For example, to search for all units at a premise you can search using an address `800 Raddison Ave%`. As another example, you can search for all customers with the name John using the search phrase `%John%`.

Note: Depending on your utility's setup and configuration, some extra search options may be available.

To find and open a customer's account:

1. Sign in to your Oracle Utilities product, such as Customer Care and Billing.
2. Navigate to Control Central Search, and create a search query to locate a customer account.
3. After including your search query, click **Search**. All applicable customer accounts are displayed. Refine your search based on the results and search again if needed. For information on accessing a customer's account, see "Accessing a Customer's Account" on page 73.

Accessing a Customer's Account

Customer Service Representatives with the proper permissions can access a customer's Digital Self Service - Transactions Web Portal account to assist with questions and troubleshooting. When you do this, you can see the Digital Self Service - Transactions Web Portal much like the customer sees it. This process is also referred to as masquerading. You can review information for the customer's account as well as make changes on their behalf.

Note: Be aware that any changes completed while logged in to the customer's account are saved. If you and the customer are on the Digital Self Service - Transactions Web Portal at the same time, any changes made are preserved for the last person that saves their updates.

To access a customer's account:

1. Sign in to your Oracle Utilities product, such as Customer Care and Billing.
2. If you need to locate a particular customer account, follow the steps to find a customer account, as described in "Finding a Customer's Account" on page 73
3. Open the applicable customer account from the list of search results.
4. From the **Customer Information** tab, navigate to the **Web User Summary** zone. The Web User Summary zone displays unique web users who are linked to the account, the web user's role, relationship, and if they are financially responsible for the account. Additionally, if there are open self-service tasks created by this user, a link to the open self-service tasks is provided.
5. From the **Action** drop-down list, select **Masquerade** to masquerade as the customer. If your utility has enabled the acknowledgement form, you are prompted to confirm that you wish to open the portal as this customer. Your utility's web portal with the web user's information is displayed. You can now see and interact with the web portal as the customer sees it, and you will have an easier time troubleshooting or answering questions.
6. To end the masquerade session, click the close link from the banner near the top of the Digital Self Service - Transactions Web Portal to return to your Oracle Utilities product.

Finding Self-Service Tasks

Certain customer interactions with Digital Self Service - Transactions generate self-service tasks. These tasks can require processing to complete certain customer tasks or requests. You can use your applicable Oracle Utilities product to find and process self-service tasks as required.

Note: This documentation provides steps to complete these configuration tasks using Oracle Utilities Customer Care and Billing. However, many of these tasks can be completed with other applicable products such as Oracle Utilities Customer to Meter or Oracle Utilities Customer Cloud Service. Refer to your applicable product documentation for steps to complete the configuration using your Oracle Utilities

product. For additional details on these tasks, refer to the applicable [Oracle Utilities Documentation](#).

To find self-service tasks:

1. Open Customer Care and Billing.
2. From **Menu**, select **Self-Service**, and then select **Self-Service Tasks**. The Self-Service Task Query is displayed.
3. Provide the applicable information to search for self-service tasks. There are multiple options to search for self-service tasks such as customer name, self-service email address, or service task ID which can be used to provide the task confirmation number. For searches that do not use the exact service task ID, you can also use the **Service Task Type** drop-down list to limit the self-service tasks to a particular type. After you have supplied the search criteria click **Search**. All applicable self-service tasks are displayed.
4. From the search results, select the **Service Task** link to access the self-service task.

List of Self-Service Tasks

The following self-service tasks can be created by Digital Self Service - Transactions features.

Features	Self-Service Task Types
"Account Notifications" on page 62	<ul style="list-style-type: none"> ▪ Prepaid Billing Payment Request Notification Task ▪ Late Payment Notification Task ▪ Payment Received Notification Task ▪ Bill Due Notification Task ▪ Bill Ready Notification Task
"Help Center" on page 69	Self-Service Task Types to support contact us actions submitted by a customer depend on the utility configuration. Contact your supervisor if you have questions.
"View Bill " on page 10	One Time Payment Task
"Manage Billing" on	<ul style="list-style-type: none"> ▪ Budget Billing Setup Task

Features	Self-Service Task Types
page 14	<ul style="list-style-type: none"> ▪ Automatic Payment Setup Task ▪ Charity Contribution
"Manage Web Account" on page 35	Invite Guest User
"Start, Stop, and Transfer Service" on page 21	<ul style="list-style-type: none"> ▪ Start/Stop Task ▪ Verify Account (AND/OR) ▪ Account Verification Task
"Payment Arrangement" on page 17	Self-Service Task Types to support payment arrangement enrollment depend on the utility configuration. Contact your supervisor if you have questions.

Feature-Specific Support

This section provides FAQs and support procedures related to specific Digital Self Service - Transactions features. If you have any questions about which products are included in your program, contact your supervisor.

Supporting Billing and Payment

As a CSR, you have various options to manage billing and payment tasks and inquiries for your customers. Some options may be hidden depending on which products are provided by your utility.

Below are common billing and payment actions you may take on a customer's account.

Note: Digital Self Service - Transactions masquerading feature does not include the ability to make a payment for the customer.

Common Support Tasks:

- [Answer frequently asked questions](#)
- "Downloading Billing and Payment Information" on page 77
- "Managing Billing Program Enrollment " on page 78
- "Identifying Who Canceled a Scheduled Payment" on page 78
- "Reviewing One-Time Payments" on page 79

Billing and Payment FAQs

What is Payment Towards Previous Balance?

If you have a past due account balance and have made a payment your payment is automatically applied to your existing balance before being applied to new charges. If your Bill Details indicates that you have made a payment towards your previous balance, the payment amount is reflected there before the cost of any new charges. Your total reflects your new charges plus your previous balance when applicable, less payments towards your previous balance.

Why was my projected bill amount different than the amount on my bill?

We do our best to let you know what you can expect to spend on your bill each month, but sometimes, our algorithms don't get it quite right. This can be due to a number of factors including your usage over the course of your billing period, taxes, or other fees.

How do I unenroll from a payment arrangement?

If you're enrolled in a payment arrangement plan, we'll help you with unenrollment over the phone.

Why am I unable to pay my account online?

Certain accounts are prohibited from accepting online payments. Standard bills are delivered for accounts that are prohibited from accepting online payments.

Downloading Billing and Payment Information

As a CSR, you can download billing and payment information for a customer's account.

Downloading a Customer's Current Bill

Complete the following steps to download a customer's current bill.

To download a customer's current bill:

1. Access a customer's account and masquerade as the customer. For complete steps to complete this task, see "Accessing a Customer's Account" on page 73.
2. While masquerading as the customer, from **Billing and Payment**, select **View Bill**.
The customer's current bill is displayed.
3. Select **View bill (PDF)** to download a PDF version of the customer's bill.

Downloading Billing and Payment History

Complete the following steps to download billing and payment history for a customer.

To download billing and payment history:

1. Sign in to the Digital Self Service - Transactions Web Portal with CSR user account and password.
2. Access a customer's account and masquerade as the customer. For complete steps to complete this task, see "Accessing a Customer's Account" on page 73.
3. While masquerading as the customer, from **Billing and Payment**, select **View Bill**. The customer's billing and payment history is displayed.
4. Select **Download History** to download the customer's billing and payment history as a comma separated value (CSV) file.

Managing Billing Program Enrollment

As a CSR, you can enroll or unenroll customers from programs configured by the utility that are used to manage the payment of their utility bills.

To manage billing program enrollment:

1. Access a customer's account and masquerade as the customer. For complete steps to complete this task, see "Accessing a Customer's Account" on page 73.
2. While masquerading as the customer, from **Billing and Payment**, select **Manage Billing**. The billing programs available to the customer are displayed.
3. Select the program that the customer is interested in modifying their enrollment. You can then select to enroll or unenroll the customer. Be aware that modifications to some programs such as automatic payments may not be available during masquerade sessions or may require processing before they are completed.

Identifying Who Canceled a Scheduled Payment

As a CSR, you can identify the user responsible for canceling a scheduled payment, which can help answer questions from customers related to canceled payments.

To identify the user who canceled a payment:

1. Log in to Customer Care and Billing.
2. From the **Menu**, select **Self-Service**, and select **Self-Service Task**. The Self-Service Query page is displayed.
3. Search for the canceled payment by providing the following:
 - **Search By:** Select the attribute to search for. Common search criteria is to search by the **Customer Name**, or provide the direct **Service Task ID** if that value for the canceled payment is known. Enter applicable search criteria for the style of search selected.
 - **Service Task Type:** For searches other than Service Task ID, select **One Time Payment Task**.

4. Select **Search** to display a list of self-service tasks. Select the applicable self-service task to review details about the task.
5. From the **Log User** area, you can review the user name and person responsible for canceling the payment. An example canceled payment is shown below.

Oracle Utilities Customer Care and Billing

Self-Service Task: One Time Payment Task Type, Discarded, 12-22-2022 10:25PM

Main Log

Tender Details

Person Payment Option

Payment Date 12-31-2028

Tender Amount \$6.00

Payment Type Checking Withdrawal

Routing Number 6568101928

Account Number *****

Payment Details

Account	Payment Amount
Williams,Sabela, Residential, \$48.89	\$6.00

Account Validation Details

Web Debit Account

Validation Status

Error Wait Timeout

Date/Time

Pre-Notification

Payment Event

Log User

Payment Cancelled By bthompson

Person Brian Thompson

Reviewing One-Time Payments

As a CSR, you can review various information about one-time payments. With the proper configurations in places, searches of one-time payments can include username, correlation ID, start date, and end date to return applicable results. Details related to the transaction including date and time, username, correlation ID, processing time, dollar amount, and if a transaction fails are included. Transactions marked as failed also include error code and error category information.

To review details about one-time payments:

1. Log in to Customer Care and Billing.
2. From the **Menu**, select **Self-Service**, and select **Self-Service Task**. The Self-Service Query page is displayed.

3. Search for the one-time payments by providing the following:
 - **Search By:** Select the attributes to search for.
 - **Service Task Type:** Select **One Time Payment Task**.
4. Select **Search** to display a list of self-service tasks. Select the applicable self-service task to review details about the task.

Supporting Start, Stop, and Transfer Service

As a CSR, you can manage service changes for your customers. Some options may be hidden depending on which products are provided by your utility.

Below are common actions you may need to take with Start, Stop, and Transfer service requests.

Common Support Tasks:

- [Answer frequently asked questions](#)
- "Starting or Transferring Service for a Customer" on page 81

Start, Stop, and Transfer Service FAQs

Why do you need my driver's license or social security number to start service?

We take our customers' personal data seriously. We want to ensure that we're only starting service in the name of the person who has actually requested the service. For this reason, we use personal identifiers to verify identities prior to making account changes.

How do I get started if I am a new customer?

Click the **Start & Stop Service** link. Choose the **I am a new customer** option and complete the required fields.

How do I get started if I have had service before?

Click the **Start & Stop Service** link in the main navigation. Choose the **I am an existing or former customer** option and complete the required fields.

I cannot find my address when trying to start service, how do I find my service address?

If you are entering your street address and it does not return the correct address, you can enter a portion of the street address and the % character to perform a wildcard search. For example, if you live at 123 Main Street Unit 456, you can enter 123 Main Street% 456 to search for your address.

Starting or Transferring Service for a Customer

As a CSR, you can manage service changes for your customers. Some options may be hidden depending on which products are provided by your utility.

Start Service

Complete the following steps to start utility service for a customer.

To start service for a customer:

1. Access a customer's account and masquerade as the customer. For complete steps to complete this task, see "Accessing a Customer's Account" on page 73.
2. While masquerading as the customer, select **Start & Stop Service**. The start and stop service options are displayed.
3. Select **Add Service** and complete all required fields to start the new utility service for the customer.

Transfer Service

Complete the following steps to transfer utility service for a customer.

To start service for a customer:

1. Access a customer's account and masquerade as the customer. For complete steps to complete this task, see "Accessing a Customer's Account" on page 73.
2. While masquerading as the customer, select **Start & Stop Service**. The start and stop service options are displayed.
3. Select **Transfer Service** and complete all required fields to transfer the utility service for the customer.

Supporting Web Account Management

As a CSR, you have various options to manage web account preferences for your customers. Some options may be hidden depending on which products are provided by your utility.

Common Support Tasks:

- [Answer frequently asked questions](#)
- See "Updating Web Login Information" on page 82.
- See "Connecting and Unlinking Accounts" on page 83.
- See "Managing Guest Users" on page 84.
- See "Modifying the Account Nick Name" on page 85.
- Depending on your configuration, customers might be required to contact the utility to change the name associated with their account. Contact your supervisor for

instructions on how to update the name of the main customer associated with an account

Manage Web Account FAQs

Why can't I change my name?

We take our customers' personal data very seriously, therefore, the person who is currently named on the bill must request this change.

What are connected accounts?

You may have multiple utility accounts linked to their web login for Digital Self Service - Transactions. Each utility account has a nickname, account ID, and address. A **Premises** expand displays additional addresses for utility accounts with multiple addresses. You can connect new accounts to your web login so it's easy to manage all of your accounts in one place. This is a common task when starting a new utility service.

Why am I a guest on some accounts?

A utility account holder has given you access to their account information online. Depending on your role, this could give you permission to view information or make payments.

Updating Web Login Information

As a CSR, you can help customers update their web login information. The steps to update this information depend on whether your utility has configured authentication through Oracle Utilities Identity Cloud Service or through a separate third-party identity provider.

To update web login password for Identity Cloud Service authentication:

1. Access a customer's account and masquerade as the customer. For complete steps to complete this task, see "Accessing a Customer's Account" on page 73.
2. While masquerading as the customer, select **Manage Web Account**. The customer's web account information is displayed.
3. From the **Web Login Details** area, select **Edit**. A prompt to update the password is displayed.
4. Enter the customer's previous password and the new password.

If the customer does not know their current password, you must return to the main login page and use the Forgot Password link. Completing the forgot password steps sends a reset password link to the customer's email address. Work with the customer to reset the password as required.

To update web login information for a third-party identity provider:

1. Sign in to the Digital Self Service - Transactions Web Portal with CSR user account and password.
2. Access a customer's account and masquerade as the customer. For complete steps to complete this task, see "Accessing a Customer's Account" on page 73.
3. While masquerading as the customer, select **Manage Web Account**. The customer's web account information is displayed.
4. From the **Web Login Details** area, select **Edit email and password**. This link redirects you to your utility's third-party identity provider. Contact your supervisor for instructions on how to update web login information using your third-party identity provider.

Connecting and Unlinking Accounts

As a CSR, you can help customers connect or unlink accounts for their utility service.

Connecting Accounts

As a CSR, you can help customers connect accounts for their utility service.

Note: By default, only the main customer account can be connected to the utility account. To connect additional accounts, you must first invite them as guest users, as described in See "Managing Guest Users" on page 84..

To connect a new account:

1. Access a customer's account and masquerade as the customer. For complete steps to complete this task, see "Accessing a Customer's Account" on page 73.
2. While masquerading as the customer, select **Manage Web Account**. The customer's web account information is displayed.
3. From the **Connected Accounts** area, select **Connect New Account**. Complete the prompts to provide the required information to connect the account.

Unlinking Accounts

As a CSR, you can help customers unlink a connected account from their utility service.

To unlink a connected account:

1. Sign in to the Digital Self Service - Transactions Web Portal with CSR user account and password.

2. Access a customer's account and masquerade as the customer. For complete steps to complete this task, see "Accessing a Customer's Account" on page 73.
3. While masquerading as the customer, select **Manage Web Account**. The customer's web account information is displayed.
4. From the **Connected Accounts** area, select **Unlink Account** for the account to unlink. Select Yes to confirm the unlink action.

Managing Guest Users

As a CSR, you can help customers create and manage guest users that can access the customer's utility account.

Inviting Guest Users

As a CSR, you can help customers invite guest users to access their utility account.

To invite a guest user:

1. Access a customer's account and masquerade as the customer. For complete steps to complete this task, see "Accessing a Customer's Account" on page 73.
2. While masquerading as the customer, select **Manage Web Account**. The customer's web account information is displayed.
3. From the **Connected Accounts** area, select **Add Guest User** for the account to invite guest users to.
4. Complete the contact information for the guest user. You must also select the level of access granted to the guest user. Select an option from the **Access Level** drop-down list to learn more about what permissions the access level provides the guest user.
5. Select **Add Guest User** to complete the guest user invitation. A notification is sent to the email address you provided for the guest user, providing the guest user with a link to accept the invitation.

Removing Guest Users

As a CSR, you can help customers remove guest users from their utility account.

To invite a guest user:

1. Access a customer's account and masquerade as the customer. For complete steps to complete this task, see "Accessing a Customer's Account" on page 73.
2. While masquerading as the customer, select **Manage Web Account**. The customer's web account information is displayed.
3. From the **Connected Accounts** area, select the **Guest Users** expand to display the guest users for an account.

4. Select **Remove Guest User** to remove the guest user from the account. Select **Remove Guest User** again to confirm the removal. The guest user is removed from the account. The guest user is not provided notification that they have been removed from the account.

Modifying Permissions for Guest Users

As a CSR, you can help customers modify the level of access for guest users on their utility account.

To modify permissions for a guest user:

1. Access a customer's account and masquerade as the customer. For complete steps to complete this task, see "Accessing a Customer's Account" on page 73.
2. While masquerading as the customer, select **Manage Web Account**. The customer's web account information is displayed.
3. From the **Connected Accounts** area, select the **Guest Users** expand to display the guest users for an account.
4. Select **Change Access Level** for the applicable guest user account.
5. From the **Access Level** drop-down list, select the access level to apply for the guest user.
6. Select **Save** to save any changes.

Modifying the Account Nick Name

As a CSR, you can help customers to modify the nick name for their account.

To modify the account nick name:

1. Access a customer's account and masquerade as the customer. For complete steps to complete this task, see "Accessing a Customer's Account" on page 73.
2. While masquerading as the customer, select **Manage Web Account**. The customer's web account information is displayed.
3. From the **Connected Accounts** area, select the pencil icon next to the account.
4. Update the account nick name and select **Save**.

Supporting Alerts and Notifications

Alerts and notifications are typically informational only and therefore, there are no additional steps to support them. Frequently asked questions are available to help answer customer questions related to their alerts and notifications.

Common Support Tasks:

- [Answer frequently asked questions](#)

Alerts and Notifications FAQs

What is the difference between an alert and a notification?

Alerts are considered critical information about your account and are displayed directly on the Overview Dashboard. You can scroll through all critical alerts.

Notifications are considered non-critical information. Customers with more than one non-critical notification see a summary of notifications on the Overview Dashboard with the total number of non-critical notifications.

All active alerts and notifications are available to customers in the Notification Center.

How are these alerts and notifications different from my billing and payment alerts or energy use communications and alerts?

Alerts and notifications cover areas such as payments, billing information, and account status updates and they appear within the web portal.

Billing and payment alerts and energy use communications and alerts are sent to the customer through different channels, such as email and SMS.

Supporting Billing Communications

As a CSR, you have various options to manage billing communication preferences for your customers. Some options may be hidden depending on which products are provided by your utility.

Common Support Tasks:

- [Answer frequently asked questions](#)
- See "Modifying Contact Methods" on page 87.
- See "Modifying Bill Delivery" on page 88.
- See "Modifying Billing and Payment Alerts" on page 89.

Billing Communications FAQs

Why can't I remove a contact method?

A minimum of one primary contact method is required for each contact type that you have included for your account. For example, if you include phone number contacts for your utility account, one must be defined as the primary phone contact. The primary contact methods cannot be deleted but can be modified if you need to update it.

Why am I getting a physical bill in the mail?

Your billing preferences are currently set to mail delivery. If you would like to enroll in paperless billing, click the **Enroll in Paperless Billing** link and follow the steps to complete enrollment.

Why am I getting emails from you?

We hope these billing and payment alerts can keep you informed of available programs and offers, your bill status, and payment information so that you can plan for the respective expenses.

How can I unsubscribe?

You can unsubscribe from billing and payment alerts in a number of ways, though how you unsubscribe will depend on your utility's program design.

The recommended method is to change your preferences using the Billing and Payment Alerts options available from your billing communications preferences. If you unsubscribe in this way, you will be able to subscribe again in the future.

Modifying Contact Methods

As a CSR, you can make modifications to a customer's contact methods that can be used for billing communications.

Adding a Contact Method

Complete the following steps to add a contact method.

To add a contact method:

1. Access a customer's account and masquerade as the customer. For complete steps to complete this task, see "Accessing a Customer's Account" on page 73.
2. While masquerading as the customer, from **Notifications**, select **Billing**. The customer's billing communication preferences are displayed.
3. Select **Add a contact** to begin creating a new contact method.
4. Complete all required information for the contact method. You can also select **Set as primary** to define the contact method as a primary contact method.
5. Select **Create** to complete the creation of the contact method.

Editing a Contact Method

Complete the following steps to edit a contact method.

To edit a contact method:

1. Access a customer's account and masquerade as the customer. For complete steps to complete this task, see "Accessing a Customer's Account" on page 73.
2. While masquerading as the customer, from **Notifications**, select **Billing**. The customer's billing communication preferences are displayed.
3. Select **Edit** for the contact method to modify. Make all applicable changes and select **Save**.

Removing a Contact Method

Complete the following steps to remove a contact method.

Note: Primary contact methods cannot be removed.

To remove a contact method:

1. Access a customer's account and masquerade as the customer. For complete steps to complete this task, see "Accessing a Customer's Account" on page 73.
2. While masquerading as the customer, from **Notifications**, select **Billing**. The customer's billing communication preferences are displayed.
3. Select **Remove** to remove the applicable contact method. Select **Yes Remove Contact** to confirm the removal.

Modifying Bill Delivery

As a CSR, you can modify how a customer's bill is delivered.

Enrolling in Paperless Billing

As a CSR, you can enroll a customer in paperless billing and modify how a customer's bill is delivered.

To enroll in paperless billing and modify bill delivery:

1. Access a customer's account and masquerade as the customer. For complete steps to complete this task, see "Accessing a Customer's Account" on page 73.
2. While masquerading as the customer, from **Notifications**, select **Billing**. The customer's billing communication preferences are displayed.
3. From the **Bill Delivery** section, select **Enroll in Paperless Billing**. The paperless billing program details are displayed.
4. Select **Enroll** to enroll the customer in paperless billing using the primary email address. If a customer wants to use a different email address, you can define a

different email address as the primary email contact method, as described in "Modifying Contact Methods" on page 87.

Unenrolling in Paperless Billing

As a CSR, you can unenroll a customer from paperless billing and select the correct mailing address for bill delivery.

To unenroll in paperless billing and modify bill delivery:

1. Access a customer's account and masquerade as the customer. For complete steps to complete this task, see "Accessing a Customer's Account" on page 73.
2. While masquerading as the customer, from **Notifications**, select **Billing**. The customer's billing communication preferences are displayed.
3. From the **Bill Delivery** section, select **Unenroll in Paperless Billing**. The paperless billing program details are displayed.
4. Select **Unenroll** to unenroll the customer from paperless billing and deliver their bill to their primary mailing address.
5. From **Notifications**, select **Billing** to return to the customer's billing communication preferences.
6. If a customer wants to use a different mailing address, from the **Bill Delivery** section, select **Edit** for the bill delivery contact method and make any required changes. Select **Save** to save any changes.

Modifying Billing and Payment Alerts

As a CSR, you can modify the billing and payment alerts that a customer is set up to receive.

To modify billing and payment alerts:

1. Access a customer's account and masquerade as the customer. For complete steps to complete this task, see "Accessing a Customer's Account" on page 73.
2. While masquerading as the customer, from **Notifications**, select **Billing**. The customer's billing communication preferences are displayed.
3. From the **Billing and Payment Alerts** section, review the billing and payment alerts that the customer is enrolled in.
4. Select the plus icon to enroll in new alerts and provide an applicable contact method. Repeat this step for each billing and payment alert to enroll the customer in.
5. Select **remove** from the contact method for a billing and payment alert to unenroll the customer. Repeat this step for each billing and payment alert to unenroll the customer in.
6. Select **Save** to save all changes.

Supporting Help Center

The Help Center provides customers with options to answer questions they have about their utility bill or service. Customers can also take action on common customer tasks.

As a CSR, you can direct a customer to the help center to submit a support request by using one of the utility configured support topics.

Common Support Tasks:

- [Answer frequently asked questions](#)
- When a customer submits a question, a self-service task record is created. The question history summarizes all of the questions that the customer has submitted and distinguishes between those that are pending and resolved. CSRs may add comments on the request. Customers may comment on pending questions to respond to the utility when needed in the additional message field on the question page. Attachments are accessible by CSRs from the service task that is created when a customer submits a question and attachment. When the utility closes the customer self-service task, the question is considered resolved and customers can no longer add comments. For information on finding self-service tasks for a customer, see "Finding Self-Service Tasks" on page 74.

Help Center FAQs

What file formats can I send?

Supported file types and file size limits are defined by your utility. Contact your supervisor to confirm what type of files customers can send you as part of support requests.

Where are files stored when I send them in a support request?

File destination is defined by your utility. Contact your supervisor to confirm where files are stored.

What questions can I submit?

Question topics are defined by your utility and are available from the **Select a topic** drop-down list.