Opower High Bill Alerts Non-AMI

Opower High Bill Alerts Non-AMI Configuration Guide

F56980-03
July 2025

Opower High Bill Alerts Non-AMI Opower High Bill Alerts Non-AMI Configuration Guide,

F56980-03

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1

Oracle Utilities Opower High Bill Alerts Non-AMI Configuration Guide

Welcome to the Oracle Utilities Opower High Bill Alerts Non-AMI Configuration Guide. Use this information to learn what product configurations are available for your program. Have a question? Contact Your Delivery Team or visit My Oracle Support.

> **Note:**
>
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- Getting Started
- Design and Configuration
- Delivery
- Frequently Asked Questions (FAQs)
- Next Steps
- Contacting Your Delivery Team

2

Getting Started

This guide is used during the Oracle Utilities Opower launch process to provide product design information, collect utility configuration preferences for the products being launched, and track the finalization of these preferences. The preferences are then used to set up your Oracle Utilities Opower products and platform.

This guide focuses on configuration preferences for the Oracle Utilities Opower Non-Advanced Metering Infrastructure High Bill Alerts program.

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Product Overview

High Bill Alerts (non-AMI) are digital communications sent to the customer's email account to inform customers when they are expected to receive a higher energy bill. This forecast is based on fluctuations in weather compared to a previous billing period and a home's sensitivity to these fluctuations. If the calculated energy use forecast exceeds a specific threshold compared to prior usage, an alert is sent. Alerts are delivered with enough time left in the billing cycle so that the customer can reduce energy use and substantially affect their final bill.

See the Oracle Utilities Opower Non-AMI High Bill Alerts Product Overview for more detailed feature descriptions.

Disclaimer

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

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Design and Configuration

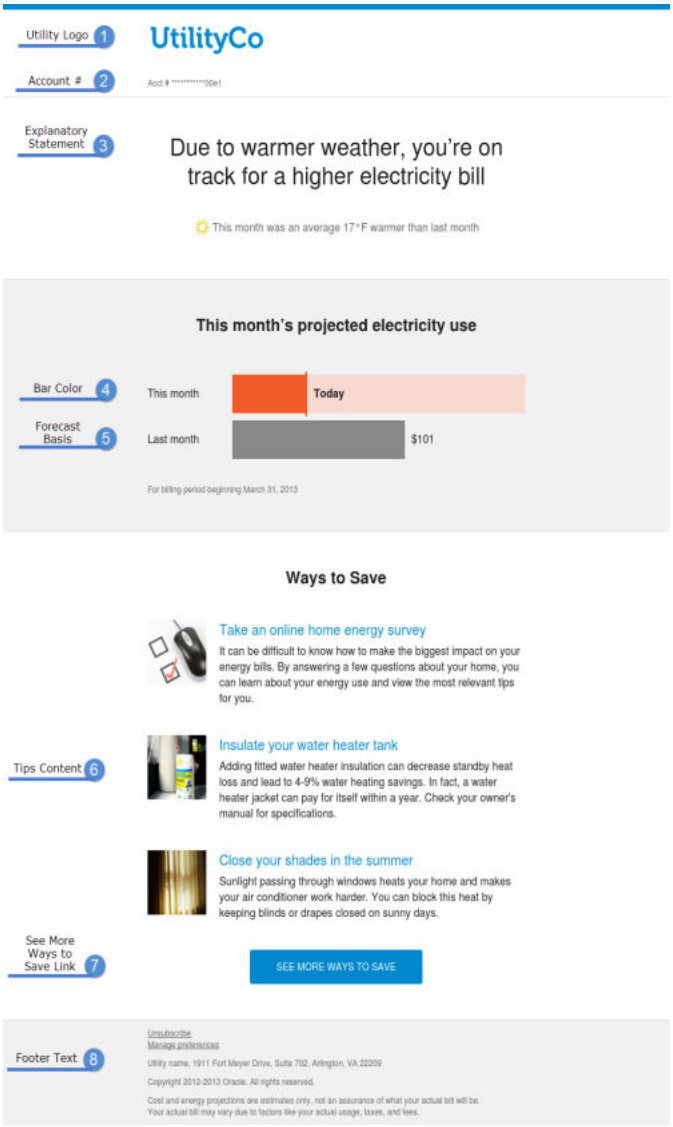
The Oracle Utilities Opower platform allows for product configurations and customizations to meet the needs of each utility. A *configuration* is a simple change that can be made with no coding required. There are required configurations and optional configurations. A *customization* is a change that requires more in-depth technical work, design, or coding to alter the appearance or behavior of the product, or to create something new within the product.

This guide only provides a summary of configuration options. Customization options may be available for your program at cost as an Oracle Utilities Opower professional service offering. Ask your Service Delivery Manager how customization options could enhance your program.

> **Note:**
>
> If an element is not listed as a configuration, you should assume that it cannot be configured and would require a customization. Contact your Service Delivery Manager if you have questions about this process or would like to make a customization request.

The following image shows the standard layout of the High Bill Alerts (non-AMI) email, and indicates the primary configuration options.

If you are including the Easy Open module in your email, you can access the configuration options for that module in the Oracle Utilities Opower High Bill Alert AMI Configuration Guide.



Configuration Options

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

Configuration Option	Input Value
Email Subject Line (Not Depicted) The email subject line can be altered, but test results have shown that the default subject lines results in the highest open rates. **Default**: The default subject lines for the High Bill Alert AMI email, which vary by fuel type and weather variations, include: • Alert - Cooler weather is impacting your electricity bill • Alert - Warmer weather is impacting your electricity bill • Alert - Cooler weather is impacting your natural gas bill • Alert - Warmer weather is impacting your natural gas bill	**Required** Choose one of the following: Use the default options. Use the following email subject lines:
1. Utility Logo The RGB and CMYK versions of the utility logo as .ai files. **Example**: UtilityCo_Logo_RGB.ai	**Required** Provide the utility logo in the Oracle Utilities Opower *Platform* Configuration Guide .
1. Utility Logo URL The logo can be configured to point to a utility-specific page. **Default:** If available, the Logo will point to the Digital Self Service - Energy Management Portal.	**Optional** Choose one of the following: Use the default and point to the Digital Self Service - Energy Management web portal. Do not use a URL. Use the following URL:
2. Account Number Format An example of how the customer account number is formatted on the alert. In your example, indicate how many digits should be displayed. In the example above, four digits are displayed. Note that this setting applies across all digital communications.	**Required** Provide the account number format in the Oracle Utilities Opower *Platform* Configuration Guide.
3. Explanatory Statement The explanatory statement alerts customers that they are on track for a high bill. It includes a weather-based reason for why the bill may be higher than expected. Based on testing, we recommend using the default statements, which include: • Due to warmer weather, you're on track for a higher electricity bill • Due to colder weather, you're on track for a higher electricity bill • Due to colder weather, you're on track for a higher gas bill	**Required** Choose one of the following: Use the default options. Use the following statements:

Configuration Option	Input Value
4. Bar Color The "This month" bar (primary color) is brightly colored to attract the customer's attention and alert them that the cost is projected to be higher than the previous month. The comparison bar (secondary color) is a neutral color. While it is possible to change the colors, we recommend using the default colors.	**Optional** Choose one of the following: Use default colors. Use these custom colors, specifying the HEX code for both primary and secondary colors:
5. Forecast Basis Specify whether to use the previous month, or the same month from the previous year as the forecast basis. The example shows the forecast basis using the previous month. Work with your Service Delivery Manager to determine which option works best for your program.	**Required** Choose one of the following: Use previous month. Use same month from previous year.
6. Tips Content All tip content in the Ways to Save section, including the name of the tip, can be altered. Note that changes to tip content will be seen by all customers. **Default**: Varies by tip.	**Optional** Contact your Service Delivery Manager for tip editing options.
7. See More Ways to Save Link This link can forward a customer directly to a specific URL. **Default:** The link directs customers to the Digital Self Service Ways to Save page. .	**Required** Choose one of the following: Use the default option. Use this URL:
Marketing Module (Not Depicted) Depending on the terms of your contract, a fully-customized marketing module can be added to the High Bill Alert (non-AMI) email after either the Forecast module or the Ways to Save module. Marketing module content, including messages, images, links, and so on, must be provided by the utility. Oracle Utilities Opower will coordinate on the design and customer segmentation. Oracle recommends using no more than one marketing module per communication so that users are not overwhelmed. **Default:** No marketing module.	**Optional** Contact your Service Delivery Manager to discuss options.
8. Footer Text The disclaimer, copyright language, legal text, and Manage Preferences link can be updated. However, while the text of the **Unsubscribe** link can be edited, it cannot be removed due to CAN-SPAM regulations in the US and similar regulations abroad.	**Optional** Provide the desired language in the Oracle Utilities Opower *Platform* Configuration Guide .

Configuration Option	Input Value
"From" Address (Not Depicted) The name that appears in the “From” line in all email communications can be altered. **Default**: The utility name is used as the "From" address.	**Optional** Indicate the following items in the Oracle Utilities Opower *Platform* Configuration Guide: From Address: From Name: Reply-To Address:
Non-delivery Window (Not Depicted) Specify the number of days after the customer's billing cycle begins and before it ends when the alert can be sent. The purpose of the non-delivery window is to ensure customers do not receive an alert too soon after their bill period starts, or too late in the bill period to be useful. The default non-delivery window settings specify that alerts should not be delivered within seven days after a new bill period starts or within seven days before the bill period ends. Testing has shown this window provides customers with sufficient time to alter their behavior and save energy before the bill cycle ends.	**Required** Choose one of the following: Use the default option of seven days. Use the following number of days:
Lower Threshold (Not Depicted) The lower threshold determines how much electricity a customer must use before an alert will be sent. Specify the required percentage difference between forecasted electric usage and baseline usage in order for a communication to be sent. For example, if you specify a lower threshold of 30%, an email will be sent only if the forecasted usage is 30% or more than the baseline. Note that this threshold applies to all customers receiving High Bill Alert emails. **Default:** 30%	**Required** Choose one of the following: Use the default value. Use the following value:
Upper Threshold (Not Depicted) The upper threshold is designed to prevent the alerts from being delivered if the cost of the upcoming bill is projected to be so high that it would be unlikely for the customer to reduce the cost. The upper threshold can be set for each fuel type. We recommend that the upper threshold is set at a multiple of 3 for electricity and at a multiple of 6 for gas. For example, assume a customer has a baseline of 1000 kWh. For a multiple of 3, this key ensures a customer would never receive an alert that projects more than 3000 kWh (3 * 1000 kWh) of usage. **Defaults:** 3 for electricity. 6 for gas.	**Required** Choose one of the following: Use the default values. Use the following value for electricity: Use the following value for gas:

User Experience Variations

The main user experience variations for High Bill Alerts (non-AMI) emails are related to fuel type, cost information, and comparison basis.

Dual Fuel Customers

Electric-only and gas-only versions of the alert are supported. Messages are generated separately for each fuel type, and there is no combined-fuel version.

For dual-fuel customers, a separate gas and electric version of the alert can be sent in the same bill period. However, this could potentially result in customers receiving two alerts per month, totaling up to 24 alerts in a year. To avoid excessive and overlapping communications, most utilities choose to align the sending of the alerts on a seasonable basis, sending gas alerts during cold seasons, and electric alerts during warm seasons.

Cost Information

Cost information is displayed in the Last Month bar if the utility sends a billed usage value to Oracle Utilities. Otherwise, usage information is displayed.

Comparison Basis

The Forecast module contains the estimated comparison in energy usage between the customer's current bill period and a previous bill period. The module will either include a comparison to the previous month or to the same month from the previous year. Both cannot be used at the same time.

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Delivery

High Bill Alert (non-AMI) emails are not regularly-scheduled communications. They are triggered based on specific criteria. For example, an alert is triggered when a customer reaches a certain percentage of usage above their typical baseline. The messages must be delivered within a particular delivery window. The rules that govern alert delivery follow.

Waking Hours: Messages must be delivered during waking hours (between 9 a.m. and 6 p.m.) in a utility-specific delivery window. You cannot choose the specific time to send.

Weekdays: Messages must be delivered only on business days (Monday-Friday). They cannot be delivered on weekends.

Non-Delivery Window: Messages cannot be delivered during the configured non-delivery window, which is during the specified number of days after bill period starts and before a bill period ends. The purpose of the non-delivery window is to ensure customers do not receive an alert too soon after their bill period starts, or too late in the bill period to be useful.

The default non-delivery window settings specify that alerts should not be delivered within seven days after a new bill period starts or within seven days before the bill period ends.

For example, suppose a customer is billed on the third day of every month. For the July 3rd bill, using the default delivery settings, Oracle Utilities could send an alert anytime between June 10th (seven days after the bill period starts) and June 26th (seven days before the bill period ends).

Delivery Frequency: Messages are limited to being sent once per billing period per service point to avoid excessive alerting.

Seasonal Delivery Consideration for Dual Fuel: Electric-only and gas-only versions of the alert are supported. Messages are generated separately for each fuel type, and there is no combined-fuel version.

For dual-fuel customers, a separate gas and electric version of the alert can be sent in the same bill period. However, this could potentially result in customers receiving two alerts per month, totaling up to 24 alerts in a year. To avoid excessive and overlapping communications, most utilities choose to align the sending of the alerts on a seasonable basis, sending gas alerts during cold seasons, and electric alerts during warm seasons.

Delivery Tools: Oracle Utilities uses third-party tools to send messages. These tools provide Oracle Utilities with information on bounces, opens, opt-outs, and click-throughs.

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

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Frequently Asked Questions (FAQs)

This section offers answers to frequently asked questions (FAQs) about the High Bill Alert (non-AMI) design options.

What was the design goal for High Bill Alert (non-AMI) communications?

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

How do customers opt out of High Bill Alert (non-AMI) Emails?

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

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

> **Note:**
>
> When a customer uses the Unsubscribe link to unsubscribe from High Bill Alert (non-AMI) emails, the customer will be removed from all Oracle Utilities Opower email communications.

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

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

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

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

Is there a limit on the size of a URL?

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

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

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

Can customers receive email alerts on more than one address?

Customers will receive High Bill Alerts (Non AMI) to the email address shared with Oracle via the platform billing file. Discuss how email recipients can be updated or added with your delivery team.

6
Next Steps

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

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

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7 Versions

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

Name	Date	Comment

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Contact Your Delivery Team

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

To contact your Delivery Team:

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

If you need to report an issue or get technical support, contact My Oracle Support.