

Oracle® Utilities Opower Affordability Cloud Service

Affordability Proactive Alerts Configuration Guide



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1

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.

Note

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

Product Overview

The Oracle Utilities Opower Affordability Proactive Alerts are email communications that educate customers about financial or energy assistance programs available from their utility. The alerts can be sent to customers who are likely to have trouble paying their utility bills, or to customers who are already behind on their bills.

Disclaimers

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

2

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 Delivery Team how customization options could enhance your program.

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

Quarterly Alerts

The Affordability Quarterly Alerts are prescheduled email communications that are sent before the start of a season, and throughout the year, to educate customers about financial or energy assistance programs available from their utility.

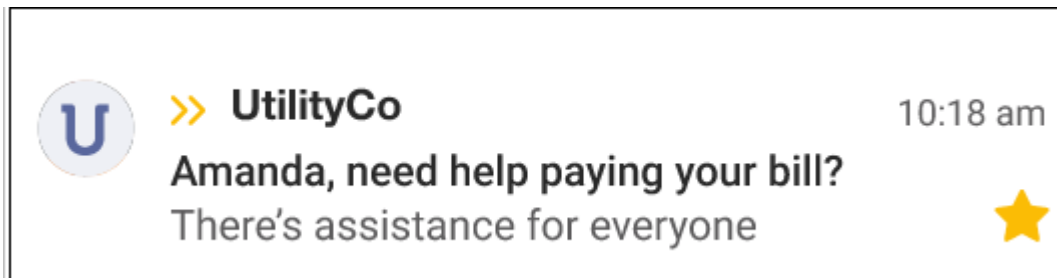
Subject Line, Pre-Header, Header, and Footer

The email subject line, pre-header, and header engages the customer and brands the communication. The footer provides customers with links to manage preferences and unsubscribe from the email channel. It also contains the utility address, necessary legal text, and optional app download and social media links.

Design

The following are examples of the Affordability Proactive Alerts subject, pre-header, header, and footer.

Subject Line and Pre-Header



Header

UtilityCo

Account #*****7890

Footer

UtilityCo

P.O. Box 1234
Austin, TX 12345-6789
888-999-9999
UtilityCo.com

Savings are estimated for typical premises in the UtilityCo service area and your actual savings may vary. UtilityCo cannot guarantee the amount of money or energy you may save by implementing the recommended actions.

[Manage Preferences](#) | [Unsubscribe](#)

Download the UtilityCo App



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Configuration Options

There are no configuration options for this module.

User Experience Variations

This topic describes the user experience variations of the subject line and pre-header.

Subject Line Variations

The subject line for Affordability Quarterly Alerts varies depending on the season, and also on the status of the customer's Savings Hub survey.

Season	Subject Line Variation
General (not summer nor winter)	<ul style="list-style-type: none"> Unstarted Survey: [customer first name], need help paying your bills? Started Survey: [customer first name], still need help paying your bills? Completed Survey: [customer first name], help with your bills is waiting for you.
Winter	<ul style="list-style-type: none"> Unstarted Survey: [customer first name], need help paying your winter bills? Started Survey: [customer first name], still need help paying your winter bills? Completed Survey: [customer first name], help with your winter bills is waiting for you.
Summer	<ul style="list-style-type: none"> Unstarted Survey: [customer first name], need help paying your summer bills? Started Survey: [customer first name], still need help paying your summer bills? Completed Survey: [customer first name], help with your summer bills is waiting for you.

Pre-Header Variations

The pre-header for Affordability Quarterly Alerts varies depending on the status of the customer's Savings Hub survey.

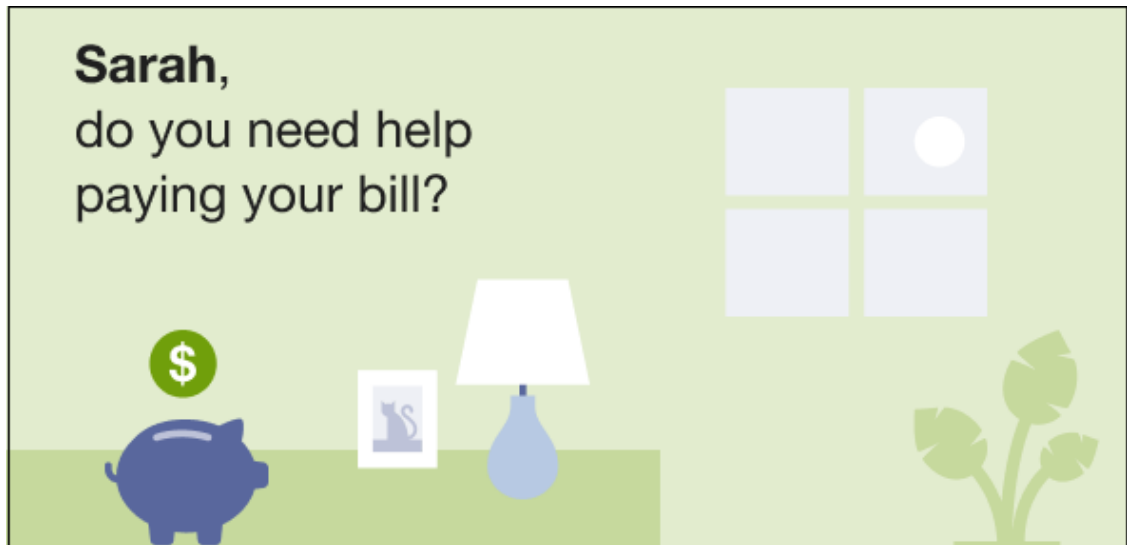
Survey Progress	Pre-header Text
Unstarted Survey	There's assistance for everyone
Started Survey	Finish the 2-minute survey to see your assistance options
Completed Survey	Check out your recommended programs

Introduction

The Introduction module is what customers first see when they open the Affordability Quarterly Alerts email. This module is meant to engage customers who may need help paying their utility bill.

Design

The following image shows an example of the Affordability Proactive Alerts Introduction module.



Configuration Options

There are no configuration options for this module.

Introduction Variations

Customers will see slight variations during the winter and summer seasons.

Winter	Summer
<ul style="list-style-type: none"> Header: [Customer's first name], keep your bills affordable and stay cozy this winter Background Image: Winter street scene 	<ul style="list-style-type: none"> Header: [Customer's first name], keep your bills affordable and stay cool this summer Background Image: Summer street scene

Insight

The Insight module for quarterly alerts cites the number of people receiving assistance with their bills within the same state or region as the customer.

Design

The following image shows an example of the Affordability Proactive Alerts Insight module for quarterly alerts.



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
<p>Social Proof Number The number of households currently receiving assistance. Default: N/A</p>	<p>Required Choose from one of the following:</p> <ul style="list-style-type: none"> Use the Low Income Home Energy Assistance Program (LIHEAP) number from the previous year (recommended). Use another preferred statistic such as the number of utility customers enrolled in an assistance program.
<p>Social Proof Details Describes the meaning of the social proof number. Default: households in your state get assistance with their bills</p>	<p>Required Choose from one of the following:</p> <ul style="list-style-type: none"> Use the default description (recommended). Provide an alternative description. There is an 80-character limit, and the details must match the social proof number. For example, if the number represents the number of people in the region, change the field to, "households in your region get assistance with their bills"
<p>Winter Assistance Amount (Not Depicted) The dollar amount of winter benefits LMI customers received the previous year. Default: N/A</p>	<p>Required Choose from the following:</p> <ul style="list-style-type: none"> Use the state LIHEAP data from the previous year (recommended). Use records on average winter benefits given to LMI customers for the previous year.
<p>Winter Assistance Details (Not Depicted) Describes the winter assistance amount Default: was the average winter assistance received in your state last year</p>	<p>Required Choose from the following:</p> <ul style="list-style-type: none"> Use the default description (recommended). Provide an alternate description of the winter assistance amount. It must match the specifics of the number used for the winter assistance amount.

Configuration Option	Input Value
<p>Summer Bill Average(Not Depicted)</p> <p>Shows the average bill amount from the previous summer season of other utility customers in the same service area as the customer</p> <p>Default: N/A</p>	<p>May require configuration</p> <p>If this field is a dynamic field (information in this field is populated from another source), then no configuration is required. However, If this is a static field (information can be entered manually), then configuration is required and the utility must use its own records to calculate the average bill amount from the previous summer season.</p>
<p>Summer Bill Average Details (Not Depicted)</p> <p>Describes the summer bill average</p> <p>Default: was the average bill amount for [UtilityCo] customers last summer</p>	<p>Required</p> <p>The text in brackets is the utility name, which is provided as part of the utility branding guidelines in the Oracle Utilities Opower Platform Configuration Guide.</p>

Insight Variations

For the winter and summer seasons, customers will see one of two variations of Insights, the default variation and the fallback variation. The default variation shows the customer's highest bill from last winter. However, if the customer doesn't have at least one bill from last winter, they will see the fallback variation of the Insight.

Winter

- **Default:** Winter bills can be higher than you expect [dollar amount] was your highest bill last winter
- **Fallback:** You can get help paying your bills [dollar amount] was the average winter assistance received in your state last year

Summer

- **Default:** Summer bills can be higher than you expect [dollar amount] was your highest bill last summer
- **Fallback:** Summer bills can be higher than you expect [dollar amount] for [UtilityCo] customers this summer

Numbered Steps

The Numbered Steps module for quarterly alerts shows three easy steps for the process of finding financial assistance through the Savings Hub survey.

Design

The following image is an example of the Numbered Steps module for quarterly alerts.

See what help you're eligible for in your Savings Hub

Here's how:

- 1 Take a 2-minute survey about your household
- 2 Check out your recommended programs
- 3 Apply for programs and receive benefits

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
Savings Hub Name Appears in the title of the module. Default: Savings Hub	Required Choose from the following: <ul style="list-style-type: none"> • Use the default (recommended). • Work with your Delivery Team to display a different name.

Numbered Steps Variations

The Numbered Steps module in quarterly alerts varies depending on the season, and on the status of the customer's Savings Hub survey.

General (Not Summer or Winter)

Survey Status	Variation Text
Unstarted Survey	Step 1: Take a 2-minute survey about your household.
Started Survey	<ul style="list-style-type: none"> • Header: Your savings Hub connects you to the help you need • Step 1: Complete the 2-minute survey about your household

Winter

Survey Status	Variation Text
Unstarted Survey	<ul style="list-style-type: none"> • Default Header: Get help paying your bills this winter • Fallback Header: See what you qualify for • Step 1: Take a 2-minute survey about your household.
Started Survey	<ul style="list-style-type: none"> • Header: Your savings Hub connects you to the help you need • Step 1: Complete the 2-minute survey about your household

Summer

Survey Status	Variation Text
Default and Fallback Unstarted Survey	<ul style="list-style-type: none"> • Header: Get help paying your bills this summer • Step 1: Take a 2-minute survey about your household.
Started Survey	<ul style="list-style-type: none"> • Header: Your savings Hub connects you to the help you need • Step 1: Complete the 2-minute survey about your household

Programs Overview

The Programs Overview module for quarterly alerts offers additional information about the type of financial assistance available through the [Savings Hub](#). The module follows the first [call-to-action](#) module in the email for customers who have not started the survey, and provides more details for them as a motivator to start the Savings Hub survey. The module dispels common misconceptions about available help by emphasizing the wide range of programs available to people in a variety of circumstances.

Design

The following image shows an example of the Programs Overview module for quarterly alerts.

Curious about the range of programs?

There are programs **for everyone**—no matter who you are.
Financial assistance can include:



Money applied directly to your utility account



Energy-efficient improvements for renters and homeowners



Programs to keep your bills affordable and predictable year-round

[Start the survey now](#)

Configuration Options

There are no configuration options for this module.

Programs Overview Variations

The Programs Overview module varies depending on the data state of the Savings Hub survey.

Survey Started

Call-to-Action Text: Complete the survey

Survey Completed

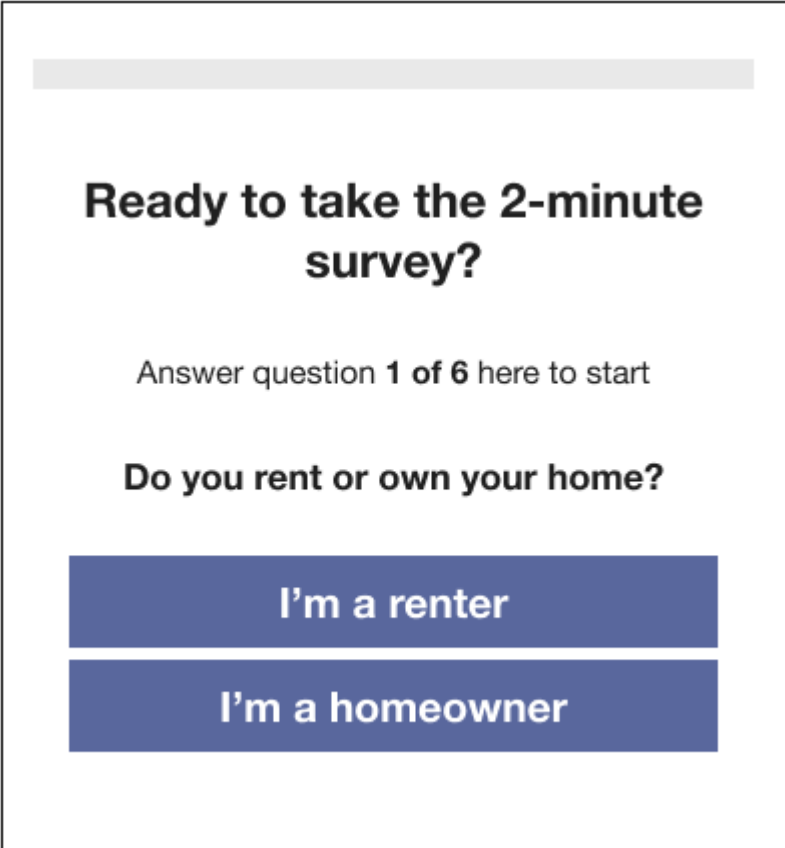
Call-to-Action Text: View your programs

Savings Hub Call to Action

The Savings Hub Call-to-Action module for quarterly alerts is meant to inspire customers to take action towards finding financial assistance through the Savings Hub survey.

Design

The following image is an example of the Savings Hub Call-to-Action module for quarterly alerts.



Ready to take the 2-minute survey?

Answer question **1 of 6** here to start

Do you rent or own your home?

I'm a renter

I'm a homeowner

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
Savings Hub Name Appears in the title of the module. Default: Savings Hub	Required Choose from the following: <ul style="list-style-type: none"> • Use the default (recommended). • Work with your Deliver Team to display a different name.

Savings Hub Call to Action Variations

The user experience for the Savings Hub Call to Action module for quarterly alerts varies depending on the data state of the customer's Savings Hub survey.

Survey Started

- **Header:** Complete the 2-minute survey to see what help you're eligible for
- **Body Copy:** You've answered X of X questions
- **Call-to-Action Button:** Complete the survey.

- **Note**

When customers click the button, the survey opens to where they left off answering questions. If the button is configured to use [Magic Link](#), the customer will be taken directly to the survey. If it is not configured, they will be prompted to sign in to their account before they can continue the survey.

Survey Completed

- **Header:** Your Savings Hub shows assistance you qualify for
- **Body Copy:** There are programs waiting on you based on your survey answers
- **Call-to-Action Button:** View your programs

- **Note**

When customers click the button they are taken to a list of available programs based on their survey answers. If the button is configured to use [Magic Link](#), the customer will be taken directly to the survey. If it is not configured, they will be prompted to sign in to their account before they can continue the survey.

Billing Triggered Alerts

The Affordability Billing Triggered Alerts are email communications that are sent to customers at critical moments within their billing cycle to let them know that there are financial assistance programs available from their utility.

These alerts can be sent to customers who likely have trouble paying their utility bills, or who are already behind on their bills. The alerts include details about which programs customers are eligible for, and behavioral messaging that encourages them to enroll, and can also direct customers to a central web resource, such as the Savings Hub, if it is set up and configured for the utility.

Subject Line, Pre-Header, Header, and Footer

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

Design

This section describes the design of the header and footer components of the Billing Triggered Alerts email.

Header





Footer

UtilityCo
P.O. Box 1234
Austin, TX 12345-6789
888-999-9999
UtilityCo.com



Savings are estimated for typical premises in the UtilityCo service area and your actual savings may vary. UtilityCo cannot guarantee the amount of money or energy you may save by implementing the recommended actions.

[Manage Preferences](#) | [Unsubscribe](#)

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Configuration Options

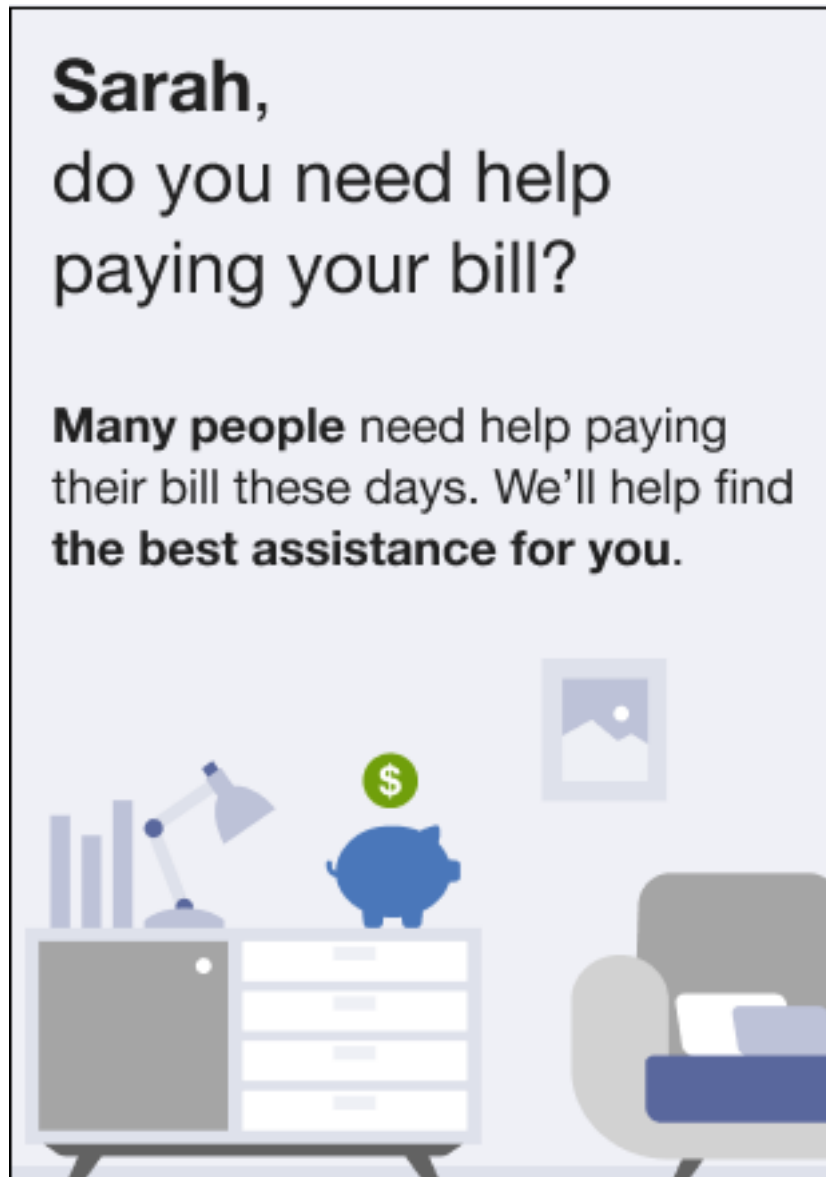
There are no configuration options for this module.

Introduction

The Introduction module is what customers first see when they open the Billing Triggered Alerts email. This module asks the customer if they need help paying their bill, and offers help in finding financial assistance.

Design

The following image shows an example of the Affordability Billing Triggered Alerts Introduction module.



Sarah,
do you need help
paying your bill?

Many people need help paying
their bill these days. We'll help find
the best assistance for you.

Configuration Options

There are no configuration options for this module.

Past Due Bill

The Past Due Bill module for Billing Triggered Alerts shows the customer their due amount, and informs them of financial assistance programs that can help with their payment.

Design

The following is an example of the Past Due Bill module for Billing Triggered Alerts:

Your past due bill

\$150.12

! To avoid a **late fee of \$25**, pay by
February 15.

If you already paid your bill, please ignore this email.

There are **programs that can help.**

Or, if you can, [pay your bill now.](#)

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
<p>Milestone Text Controls the copy that informs the customer of the payoff date and the late payment penalty.</p> <p>Default: 'To avoid a late fee of [fee milestone], pay by [payoff date].'</p>	<p>Required Choose one of the following:</p> <ul style="list-style-type: none"> Use the default copy. Work with your Delivery Team to specify a different copy.

Configuration Option	Input Value
Penalty Amount The utility provides the billing data for the penalty amount.	Required
Call to Action URL The utility provides the URL for the page where the customer can pay their bill.	Required Provide the URL to your Delivery Team .
Payment Arrangement Text For when the customer is on a payment arrangement. Default: 'Your past due bill includes a payment arrangement amount.'	Optional Choose one of these options: <ul style="list-style-type: none"> Do not display payment arrangement text. (Default) Display payment arrangement text.

Past Due Bill Variations

This section describes the user experience variations for the Past Due Bill module.

Fee Milestone (Currency-Based)

In this variation, the Milestone Text includes the late fee amount (USD currency), and the date to pay by to avoid late payment charges.

Fee Milestone (Percentage-Based)

In this variation, the Milestone Text includes the late payment charges percentage, and the date to pay by to avoid late payment charges.

Disconnection Milestone

This variation appears once the payment collection process has initiated. In such case, the module shows the past due balance amount, as opposed to showing the latest past due bill amount. Likewise, the text refers to *past due balance*, instead of *past due bill*, and requires the customer to pay a minimum amount by a specified date to avoid disconnection.

No Date

When no date has been provided by the utility for the fee requirement, the *pay by* date is omitted from the module.

No Payment Amount

When no payment amount has been provided by the utility, the late fee amount is omitted from the module.

No Milestone - Past Due Bill

When the payment collection process has not yet been initiated, and there is no milestone data, the module shows the past due bill amount, and the milestone is omitted.

No Milestone - Past Due Balance

When the payment collection process has been initiated, and there is no milestone data, the module shows the past due balance amount, and the milestone is omitted.

Payment Arrangement

When the customer is on a payment arrangement and is late on paying their bill, the module includes text referring to the payment arrangement.

Numbered Steps

The Numbered Steps module for Billing Triggered Alerts shows three easy steps for the process of finding financial assistance through the Savings Hub survey.

Design

The following is an example of the Numbered Steps module for Billing Triggered Alerts:

See what help you're eligible for

Here's how:

- 1** Take a 2-minute survey about your household
- 2** Check out your recommended programs
- 3** Apply for programs and receive benefits

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
<p>Savings Hub Name</p> <p>When the customer has already started their survey, the Savings Hub name appears in the header of the module.</p> <p>Default: Savings Hub</p>	<p>Required</p> <p>Choose from the following:</p> <ul style="list-style-type: none"> • Use the default (recommended). • Work with your Delivery Team to display a different name.

Numbered Steps Variations

The user experience for the Numbered Steps module in Billing Triggered Alerts varies depending on the status of the customer's Savings Hub survey.

Unstarted Survey

When the customer has not yet accessed to the Savings Hub survey, the header in this module tells the customer to check out the programs they are eligible for, but does not mention Savings Hub explicitly.

In Progress Survey

Once the customer has already started, but not yet completed, the Savings Hub survey, the header in this module makes explicit mention of the survey, and the text for the first step encourages the customer to complete it.

Savings Hub Call to Action

The Savings Hub Call to Action module for Billing Triggered Alerts is meant to inspire customers to take action towards finding financial assistance through the Savings Hub survey.

Design

The following is an example of the Savings Hub Call to Action module in Billing Triggered Alerts:

Ready to take the 2- minute survey?

Answer question **1 of 6** here to start

Do you rent or own your home?

I'm a renter

I'm a homeowner

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
<p>Savings Hub Name</p> <p>When the customer has already started their survey, the Savings Hub name appears in the header of the module.</p> <p>Default: Savings Hub</p>	<p>Required</p> <p>Choose from the following:</p> <ul style="list-style-type: none"> • Use the default (recommended). • Work with your Delivery Team to display a different name.

Savings Hub Call to Action Variations

The Savings Hub Call to Action module varies depending on season.

Winter Version

- **Header:** [Customer's first name], keep your bills affordable and stay cozy this winter

- **Background Image:** Winter street scene

Summer Version

- **Header:** [Customer's first name], keep your bills affordable and stay cool this summer
- **Background Image:** Summer street scene

Programs Overview

The Programs Overview module for Billing Triggered Alerts offers additional information about the type of financial assistance available through the Savings Hub.

Design

The following is an example of the Programs Overview module for Billing Triggered Alerts:

Curious about the range of programs?

There are programs **for everyone**—no matter who you are. Financial assistance can include:



Payment extension to give you a little more time to pay your utility bill



Money applied directly to your utility account



Ongoing discount rate on your utility bill

[Start the survey now](#)

Configuration Options

There are no configuration options for this module.

Resources

The Resources module in Billing Triggered Alerts points the customer to additional help and resources outside of the utility, state, and federal program assistance included in the Savings Hub. These resources are especially helpful for customers who have exhausted their options with program assistance.

Design

The following is an example of the Resources module for Billing Triggered Alerts:

More help and resources



On the phone

Call 2-1-1 to get connected with a local, trained specialist who can help you find assistance with utilities, food, housing, health care, and transportation.



In person

Visit a community action agency near you to get assistance with housing, utilities, and more. For a list of local agencies, visit masscap.org/agencies/.

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
Text Variant Our recommendation is to use the default copy, but the customer can also opt for a copy variant.	Optional Choose from the following: <ul style="list-style-type: none">• Use the default copy.• Use a copy variant.

Resources Variations

The customer can opt for either the default user experience, or a variation, for example:

Faith-Based Organizations Variant

In this alternate experience of the Resources module, the points of contact provided are Catholic Charities, and the Salvation Army. The message contains useful links for both, as well as a brief description of how these organizations can provide financial assistance.

More help and resources

✓ Faith-based organizations

Regardless of your religion, organizations like [Catholic Charities](#) and [Salvation Army](#), provide financial assistance with utility bills during particularly tough times.

✓ How they help

Once you've applied and demonstrated your financial need, the organization will provide bill payment assistance directly to your utility account.

Programs List

Based on the Savings Hub survey results, the Programs List module in Billing Triggered Alerts shows the customer their top program recommendations.

Design

The following is an example of the Programs List module in Billing Triggered Alerts:

Top 3 programs that can help

You're likely eligible for these assistance programs based on your survey answers.

1

More Time to Pay

Payment plan

A one-time payment extension gives you a little more time to pay your electric bill in full.



15,500 UtilityCo households have enrolled this year

OPEN

Learn more & enroll

2

Home Weatherization Program

Improved insulation

Configuration Options

There are no configuration options for this module.

Programs List Variations

The experience of this module varies from customer to customer depending on their Savings Hub survey results, and shows up to three programs.

3

Next Steps

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

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

Note

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

4

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](#).