Oracle Utilities Opower Business Customer Engagement Cloud Service

Business Customer Engagement Proactive Alerts Overview

Latest Release
G21432-10
April 2026

ORACLE

Oracle Utilities Opower Business Customer Engagement Cloud Service Business Customer Engagement Proactive Alerts Overview, Latest Release

G21432-10

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Getting Started

The Business Customer Engagement Proactive Alerts Cloud Service includes digital communications that are designed to educate advanced metering infrastructure (AMI) customers about their utility use. The following components are available in this service:

- High Bill Alerts AMI
- Weekly Energy Updates
- Customer Service Interface - Program Management

For an overview of all cloud services available from Oracle Utilities, see the Oracle Energy and Water Cloud Service Descriptions online at Oracle Contracts - Cloud Services Service Descriptions.

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High Bill Alerts AMI

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

In this section:

Requirements and Limitations

The following data requirements and limitations apply to all utilities and business customers in the High Bill Alert AMI program.

Utility Requirements

Category	Description
Scale	Scale restrictions may apply to the number of customers enrolled in alerts. The actual number of communications sent may be affected by attrition, opt-outs, customer eligibility, data availability, and the number of customers whose forecasted usage exceeds configured thresholds.
Language	Not all languages and locales are supported at this time. Contact your Oracle Utilities Opower Sales Representative to confirm that alerts are available in your market.
Delivery Window	High Bill Alerts AMI must be delivered during waking hours in a utility-specific delivery window. They cannot be delivered during the configured non-delivery window.
Delivery Frequency	High Bill Alerts AMI are limited to being sent once per billing period per service point to avoid excessive alerting.
Rate Modeling	Utility rates must be modeled by Oracle Utilities for cost information to appear. If rates are not modeled, energy use information is displayed by default. If the utility chooses to display cost information, rate modeling is required during initial program setup for an additional fee. See the Oracle Utilities Opower Rates Engagement Cloud Service Product Overview for more information.

Category	Description
Other Product Requirements	• **Load Shifting:** In order to provide Rate Coach insights within the High Bill Alert AMI emails, the utility must have purchased the Load Shifting: Rate Coach Cloud Service and the customer must have modeled rates. • **Web Portal Requirements:** Some of the features listed in this documentation require access to a web portal. For example, to enable customers to set a personal threshold for the Bill Forecast, or to opt in or out of the program from a utility website, the utility must provide customers with access to a web portal. Oracle Utilities Opower provides the Business Customer Engagement Digital Self-Service Web Portal. **Note** Purchasing one of these web portal products is not required to send alerts. A web portal is required only if utilities want to utilize features that require customer access to a web portal. Utilities might also decide to create their own web portal and use APIs to enable customers to access and update their information. For additional information, see the Oracle Utilities REST API documentation.

Customer Requirements

Category	Description
Billing Frequency	Monthly or bi-monthly.
Data Delivery Frequency	Daily. The utility must be able to deliver customer data to Oracle Utilities within 72 hours (48 hours from the last data read of the day). Data must be sent to Oracle Utilities in the right schema and according to the Oracle Utilities Opower Interval Data Transfer Standards.

Category	Description
Data Requirements	**Billing Data**: Billed usage data from the utility is required. **AMI Data**: Daily, hourly, or sub-hourly AMI data is required. High Bill Alerts AMI will not be sent without this level of data granularity. The customer must have AMI data going back to the beginning of the current billing cycle. Hourly or subhourly AMI data is required for the Time of Day module (otherwise that module is hidden). AMI data is not required for weather insights to appear in the Time of Day module. **Contact Information**: The customer must have valid contact information for the channels through which they receive High Bill Alerts AMI.
Data History	AMI data going back to the beginning of the current billing cycle is required. For customers who do *not* have a personal cost threshold set, at least a year's worth of billing history is required. For customers who *do* have a personal cost threshold set, a year's worth of usage data is not required. More information about personal thresholds can be found in the Bill Forecast module topic.
Data Coverage	By default, at least 75% of the possible reads for the current billing cycle are required to calculate the bill forecast. Estimated reads count towards this threshold. This threshold is configurable. At least 75% of possible reads for the current billing cycle is required to calculate the customer's high usage period. If this threshold is not met, the Time of Day module is hidden.
Supported Fuels	Electricity and gas.

Limitations

These are the limitations:

- **Dual Fuel Customers**: Dual fuel (gas and electricity) customers will receive a single combined fuel alert.
- **Number of Service Points**: To avoid over-alerting, multiple service points of the same fuel type (in the same service agreement) are combined and sent in a single alert.

Customer Experience

High Bill Alerts AMI inform business customers before the end of a billing cycle that they are likely to have high use or a high bill for the current billing period. Business customers can then use the tips provided in the alert to reduce their consumption before the billing period ends.

Channels: Alerts can be sent through the email, text message, voice message, and mobile push channels, unless noted for a particular type of alert. A utility can specify which business customers are eligible to enroll in alerts and the channels by which they can receive those alerts.

Cost Information: Cost information can be included in the alerts if utility's rates have been modeled. This means that the cost of energy use, and the calculators used to generate that cost, are modeled in the Oracle Utilities Opower system. As a result, the alert changes to display the increase in energy use in terms of cost. Utilities can also choose to display a cost range.

Personalized Threshold: The personalized threshold allows the customer to set a minimum usage or cost that they must reach before they receive a high bill alert. This threshold applies to all alert channels. More information about personal thresholds can be found in the Bill Forecast module.

In this section:

Subject Line, Header and Footer

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

Requirements and Limitations

This section lists the requirements and limitations.

Requirements

Same as listed in the product-wide requirements.

Limitations

Unsubscribe: Unsubscribing through the link provided in the email might be permanent, depending on how utility account preferences and unsubscribe policies are set up and configured. Contact your Delivery Team for additional information.

User Experience

This section describes the user experience for subject line, header, and footer components of the High Bill Alert AMI email.

Subject Line

The subject lines used in the High Bill Alert AMI email deliver high-value information, and explain to the reader why they are receiving the alert. Note that the display of subject lines

varies based on the device and email client used to view the message. The subject line can also vary depending on the customer's program design and preferred language.

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

Header

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

The default header module includes the following components:

- A logo provided by the utility.
- The customer's name.
- The last four digits of the utility account.

Footer

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

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

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

Bill Forecast

The Bill Forecast module provides a projection of how much the business customer could spend on their utility bill if they continue their spending behavior through the end of the billing period. The module can also include personalized threshold information, and can enable customers to access and update their threshold.

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

Requirements and Limitations

This section lists the requirements and limitations.

Requirements

Same as listed in the product-wide requirements.

Limitations

No Rates: Users without modeled rates are only able to set a usage threshold.

Multiple Accounts: The personalized threshold experience varies depending on what kind of accounts the customer has.

The combined usage or cost of all fuel/resource types included in the alert must meet the threshold to trigger the alert. For example, if the customer has electric and gas service, and has set a threshold of $100, the combined cost for electric and gas must be $100 or greater to trigger the alert.

User Experience

The Bill Forecast module shows the business customer a projection of their energy usage, based on their consumption trends.

Find below an example of the Bill Forecast module, followed by a description of its components:

Forecast Statement: The forecast amount is an estimate, not an exact amount, and is based on the estimated length of the bill. By default the cost values are rounded to the nearest whole dollar. For example, "Your bill is projected to be $[XX]."

Personal Threshold Insight Statement: Below the forecast is an insight about how much more the projected bill could cost compared to the cost or usage-threshold. "That's higher than the bill threshold you set." Note that this statement appears only if the customer has set their personal threshold.

Change Your Threshold Link: Below the insight statement is a link that customers can use to change their threshold (if that feature is made available by the utility). The personalized threshold allows the customer to set a minimum threshold that their projected energy use or bill must reach before they receive a high bill alert.

When a threshold is set, the alert triggers only when cost or usage is greater than the set threshold. Utilities can also implement their own preference center, and provide access to customers using APIs. For additional information, see Oracle Utilities REST API for Digital Self Service - Energy Management.

Depending on the characteristics of a customer's accounts, the customer is provided one of the following options to define a personalized threshold. After the customer sets their threshold, when they receive an alert the module reminds them they set a threshold, and provides a link to their account where they can modify the threshold.

- **Cost threshold:** Customers with modeled rates can set a dollar threshold range of $1 - $100,000,000. When an absolute dollar threshold is set, the alert triggers only when cost is greater than the set dollar-threshold. For example, the customer could set their threshold to send the alert only if their bill exceeds $100. If the customer does not set a personalized cost threshold, they will receive alerts only when they exceed the combined usage and cost threshold set by the utility. The recommended and default utility threshold is 30 percent.
- **Usage threshold:** Customers without modeled rates can set a usage threshold percentage range of zero to 1000 percent greater than the same bill the previous year. For

example, the user could set their threshold to send the alert only if their usage is at least 25 percent greater than the same bill period the previous year. The default usage-threshold value is 30 percent. The usage-based threshold is provided to customers with at least one active account that does not have modeled rates.

User Experience Variations

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

Personal Threshold Not Set

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

Personal Threshold Not Available

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

Usage

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

Projected Range

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

Display Billing Period Date Range

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

Calculations

At a high level, the bill forecast calculation involves the following steps:

1. Calculate the baseline cost and energy values using the customer's bills from the previous year.
2. Estimate the customer's billing period end date.
3. Calculate how much energy the customer has used to date.
4. Take the customer's energy use and project it forward to the estimated billing period end date.
5. Convert the resulting energy use values to cost values, based on the customer's rate plan. The output is an actual cost value (to date) and a projected cost value (going forward). Note that the projected cost can also be displayed as a cost range, depending on the module configuration.

Business Usage Disclaimer

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

Requirements and Limitations

This section lists the requirements and limitations.

Requirements

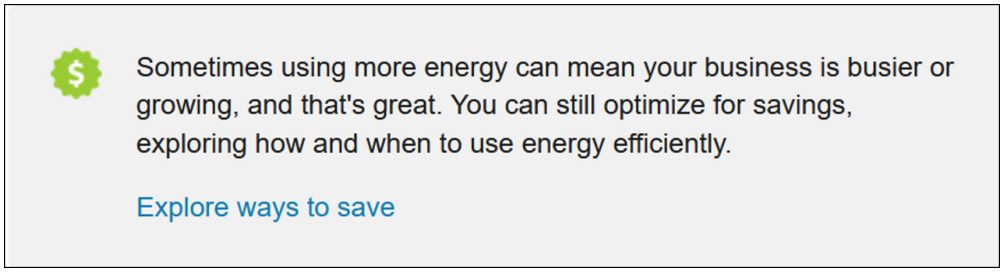
There are no applicable utility or customer requirements.

Limitations

This module is only available for commercial or small and medium business (SMB) customers.

User Experience

The Business Usage Disclaimer appears beneath the Bill Forecast module. It is meant to reassure business customers that using more energy can be a sign that their business is growing, and includes a link to view more public-facing tips in the Business Customer Engagement Digital Self Service - Energy Management web portal.



Multi-Service Forecast

The Multi-Service Forecast module is included in the Email High Bill Alert AMI for business customers who have both gas and electric service.

Requirements and Limitations

This section lists the requirements and limitations.

Utility Requirements

Same as listed in Requirements and Limitations.

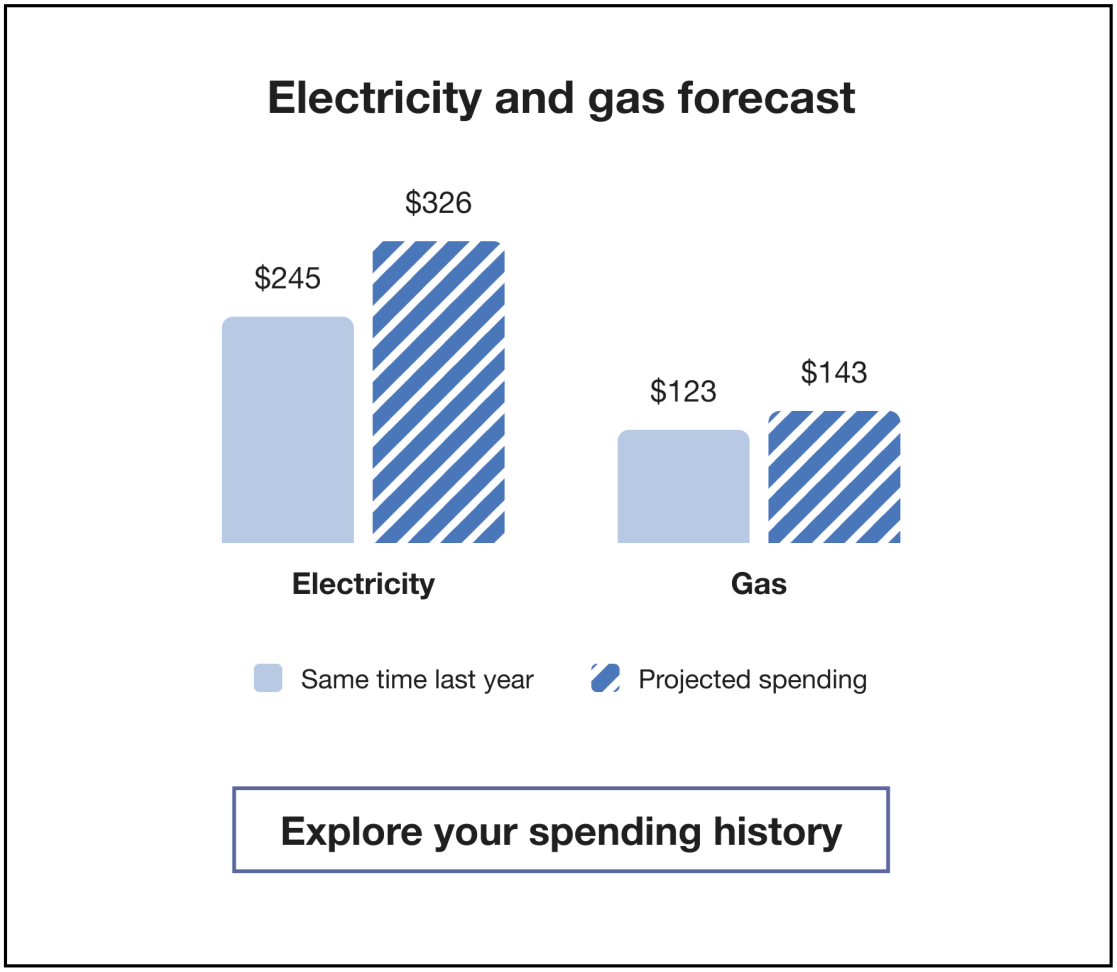
Customer Requirements

Same as listed in Requirements and Limitations. Additionally, customers must have the following for this module to generate:

- At least one electric and one gas service point.
- Bill forecast information available for both fuels.

User Experience

The Multi-Service Forecast module includes two bar graphs. Each graph compares projected use to use from the same billing period of the previous year. One graph shows electricity use and the other shows gas use. If a business customer has the cost view, a dollar amount is displayed above each graph bar. If the customer has the usage view, usage is displayed above each graph bar.



Heading: The module heading tells the customer that they are viewing a breakdown of both electricity and gas data. By default, the heading reads, "Electricity and gas forecast".

Subheading: The subheading tells the customer whether they are projected to spend more than they did during the same period last year. The message varies depending on how much they spend this billing period compared to the same period last year. For example, "You're projected to spend more on electricity and gas than the same time last year."

Bar Chart: Two graphs are displayed side by side. The graph on the left displays projected electricity costs for the current period, compared to the same period last year. The graph on the right displays estimated gas costs for the current period, compared to the same period last year. The dollar values for each bar are displayed above the bar.

Legend: Below the chart, a legend displays the color and shading used for each time-period.

User Experience Variations

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

Usage

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

Subheading

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

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

Time of Day

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

Requirements and Limitations

This section lists the requirements and limitations.

Requirements

Same as listed in Requirements and Limitations. Additionally, *hourly or sub-hourly* AMI data is required. If such data is not available, this module is hidden from view. For example, the module will not be displayed for customers who only have AMI data at daily intervals. The alert is sent with or without the module.

Limitations

Fuel Type: This module supports data for gas and electricity fuel types, and is included in emails as follows:

- **For electricity-only messages:** The module is included in the email once and shows electricity information.
- **For gas-only messages:** This module is included in the email once and shows gas information.
- **For combined fuel (gas and electricity) messages:** This module is included in the email twice: once for electricity and once for gas information.
- **For combined messages where only one fuel type has a forecast:** If only one fuel type in a combined fuel message has a forecast, then the message can revert to a single fuel communication and only display data for the available fuel type.

User Experience

The Time of Day module represents the business customer's usage trends in two bar charts, so they can identify when they use they use most energy and think about how to take corrective action.

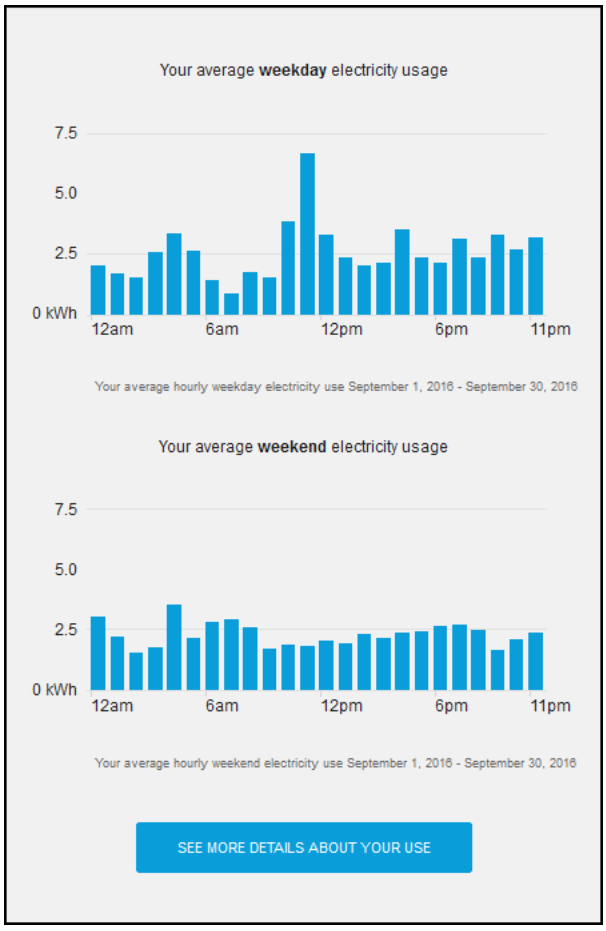


Chart Headings: The chart headings explain that the trends represent average weekday or weekend usage.

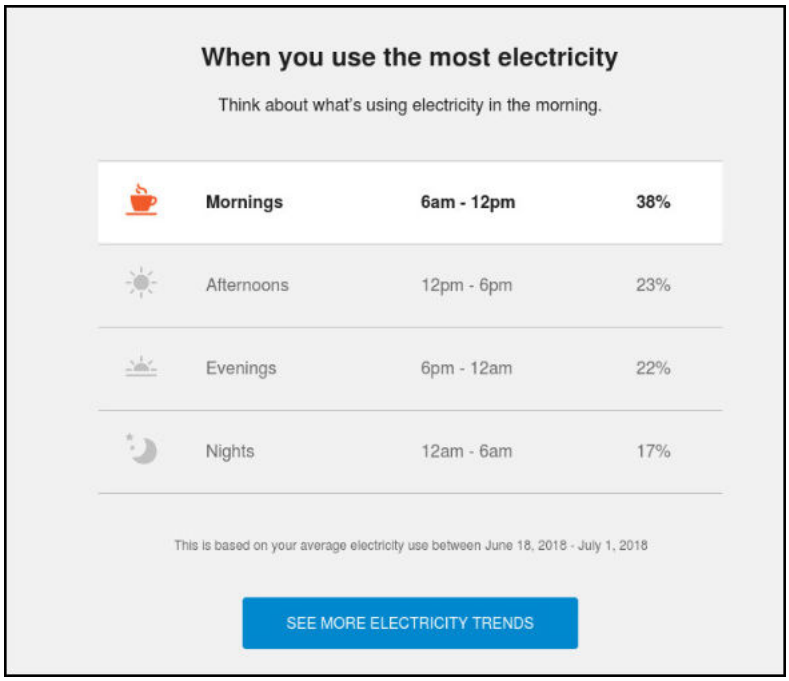
Bar Charts: The bar charts display data over a 24-hour period and represent the average usage-to-date within the current bill period.

Chart Footers: The chart footers specify the date range that the data represents. The time period covers the period-to-date, meaning the day that the bill period began to the day that the communication was generated.

See More Details about Your Use: This button directs users to the utility's website where they can view more information about their usage trends. Opower recommends directing to the Business Customer Engagement Data Browser.

Legacy Version

Depending on each utility's setup and configuration, an older version of the Time of Day module may be shown. In this case, the business customer's usage is categorized in mornings, afternoons, evenings or nights. The six-hour time period with the most usage is highlighted, while the other three time periods display in a faded color.



Heading: The module heading tells the user that this data will show them when they use the most energy.

Insight Statement: The insight statement indicates when energy was used the most. The statement varies slightly depending on which time period is highlighted.

Graph: The usage value represents usage-to-date within the current bill period. The six-hour time period with the most usage is highlighted, while the other three time periods display in a faded color.

Time Period: The time period is displayed near the bottom of the module and describes the date range that the data represents. The time period covers the period-to-date, meaning the day that the bill period began to the day that the communication was generated.

See More Electricity Trends Button: This button directs users to the utility's website where they can view more information about their usage trends. Opower recommends directing to the Business Customer Engagement Data Browser.

User Experience Variations

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

Weather Insights

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

Requirements and Limitations

This section lists the requirements and limitations.

Utility Requirements

Same as listed in Requirements and Limitations.

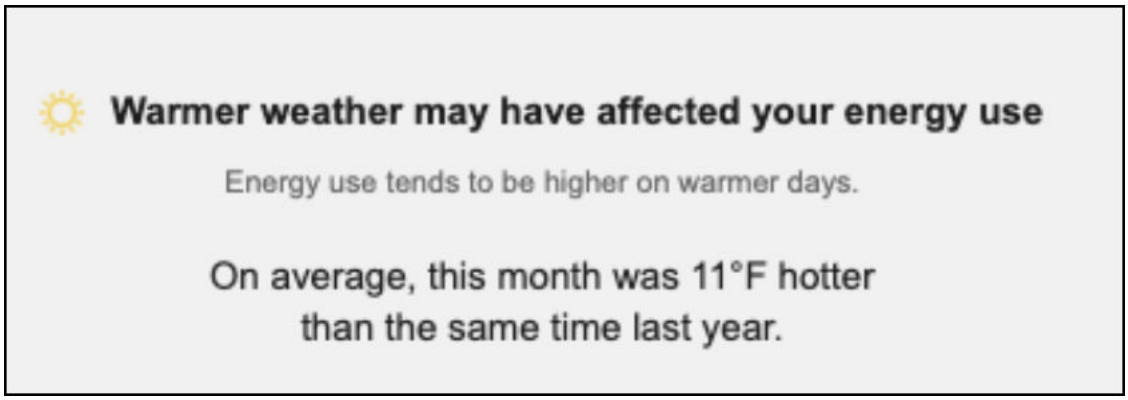
Customer Requirements

Same as listed in Requirements and Limitations. Additionally, the following interval weather conditions must be met in order for the weather insight to appear in the alert:

- The weather data interval for the current bill period or previous bill period is available.
- The weather data interval for the current season and previous season match for at least seven days.
- The weather data interval is less than the number of days for which weather data is available with respect to latency (2 days and 4 hours).

User Experience

The Weather Insights module shows the customer how the weather might have impacted their energy usage over a certain period.



Heading: The heading tells the user how the weather might have impacted their energy use, and can include a graphic showing a sun for warmer weather and a snowflake for cooler weather. For example, "Warmer weather may have affected your energy use".

Subheading: The subheading provides further explanation about why the weather might have impacted the customer's bill. For example, "Energy use tends to be higher on warmer days."

Temperature Insight: The temperature insight gives customers additional information about how weather during the current period compares to the same time last year. For example, "On average, this month was 7˚F hotter than the same time last year."

User Experience Variations

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

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

- Cooler
- Warmer
- Neutral

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

Weather Data Collection

Weather information is collected for the following intervals:

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

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

Determine Whether Seasons are Comparable

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

To be comparable the following checks are made:

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

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

Identifying the Weather Insight States

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

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

Ways to Save

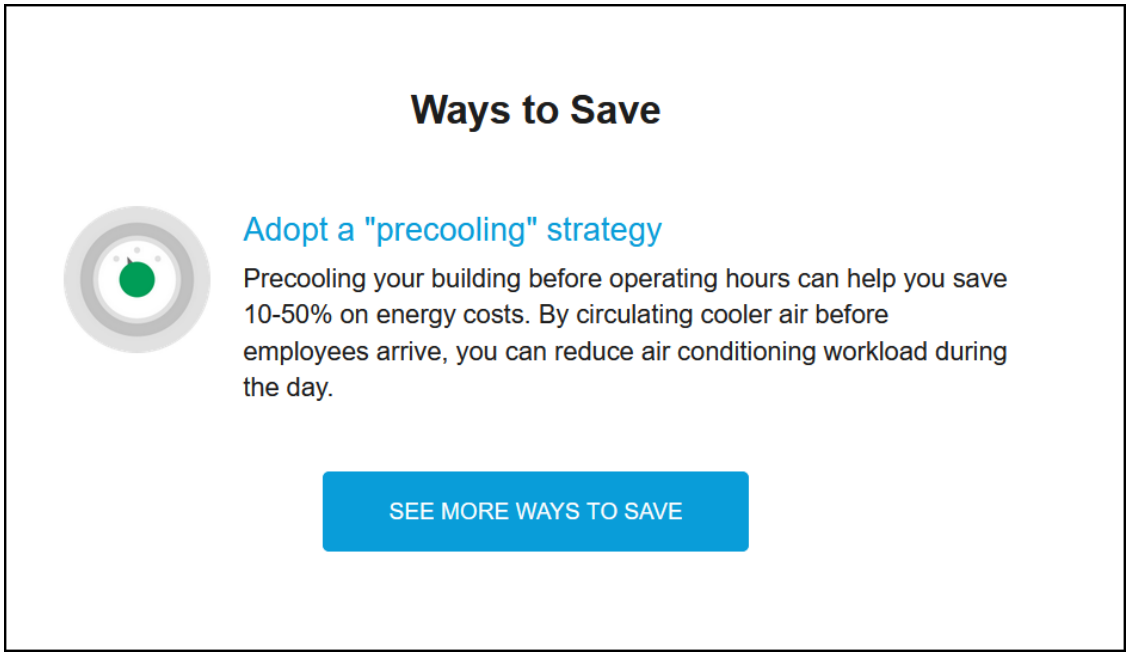
The Ways to Save module provides energy-saving advice to help business customers lower their bill before the end of the billing period. The module displays a single tip that is quick and easy to read. Business customers can click **See More Ways to Save** to view more detailed tip information in the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

Requirements and Limitations

The requirements and limitations are the same as those listed in Requirements and Limitations.

User Experience

The default user experience for this module is to display a single energy savings tip. A single tip is recommended to keep the content easy to scan and consume for busy customers. However, the module can display up to three tips.



Tip Image: The tip image is a visual representation of the action that the tip recommends.

Tip Title: The tip title is a short sentence that summarizes the recommended action. Customers can click on the title to view more detailed information about the tip.

Tip Summary: The tip summary elaborates on the tip with more explanation about why doing the tip is beneficial.

See More Ways to Save: Clicking this button takes the customer to the public-facing tip details page on the Business Customer Engagement Digital Self Service - Energy Management web portal.

Marketing Message

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

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

User Feedback

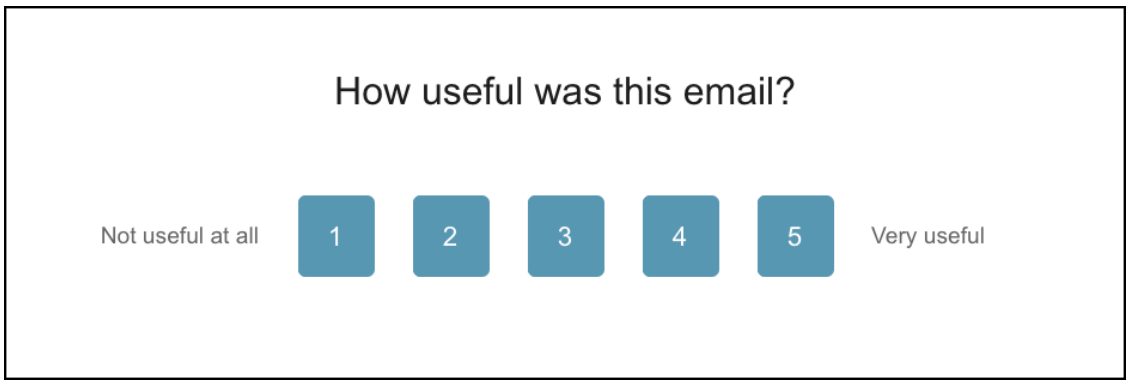
The User Feedback module can be included at the end of the High Bill Alert AMI email to solicit feedback on how useful this email is to customers. Customers can indicate their response on a scale from 1 to 5. After submitting their feedback, customers are directed to a confirmation page and thanked for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

Requirements and Limitations

The requirements and limitations for this module are the same as those listed in Requirements and Limitations.

User Experience

This section describes the common user experience for the User Feedback module.



Prompt: A question at the top of the module asks customers if the promotion is helpful.

Response Option Buttons: The customer can respond 'Yes' or 'No' to the module questions.

Confirmation: After submitting feedback, customers are directed to a confirmation page where they are thanked for their input. The page also informs customers that their feedback is used to make improvements to the product.

Delivery

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

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

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

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

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

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

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

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

Providing Customer Support

Customer Service Representatives can do the following in the Oracle Utilities Opower Customer Service Interface (CSI) to assist with customer inquiries related to alerts:

- Review copies of alerts sent to customers
- Manage a customer’s alert preferences (including unsubscribing them)
- Access a customer's Oracle Utilities web portal account and view and update their alert settings

See Supporting Business Customer Engagement Proactive Alerts for details.

3

Weekly Energy Updates

Weekly Energy Updates are email reports sent to customers every week to inform them of their energy usage patterns, trends, and projected energy costs. With these emails, business customers can better understand how their actions correspond to their utility bills, get a preview of their bills, and get helpful insights on how to adjust their energy usage. Weekly Energy Updates provide a new, modernized experience with bold colors, a varied layout, and data-driven insights targeted to specific business customer attributes.

Business customers can also be selected to receive Cost Tracker emails as a replacement for the standard Weekly Energy Update email.

In this section:

Requirements and Limitations

The following data requirements and limitations apply to all utilities and business customers enrolled in Weekly Energy Updates, within the Business Customer Engagement Proactive Alerts Cloud Service.

Utility Requirements

Category	Description
Scale	The number of communications sent may be affected by attrition, opt-outs, customer eligibility, and data availability.
Language	Not all languages and locales are supported at this time. Contact your Oracle Utilities Sales Representative to confirm that alerts are available in your market.

Category	Description
Other Product Requirements	• **Web Portal Requirements:** Some of the features listed in this documentation require access to a web portal. For example, to enable customers to set a personal threshold for the Bill Forecast, or to opt in or out of the program from a utility website, the utility must provide customers with access to a web portal. Oracle Utilities Opower provides the Business Customer Engagement Digital Self-Service Web Portal. **Note** Purchasing the web portal is not required to send alerts. A web portal is required only if utilities want to utilize features that require customer access to a web portal. Utilities might also decide to create their own web portal and use APIs to enable customers to access and update their information. For additional information, see the Oracle Utilities REST API documentation. • **Single Sign-On**: The utility must use single sign-on (SSO) to be able to edit customer email addresses for non-recipients of the program, or they must edit these via Oracle Utilities Opower APIs.

Customer Requirements

Category	Description
Billing Frequency	Monthly or bi-monthly.
Data Delivery Frequency	Daily. The utility must be able to deliver customer data to Oracle Utilities within 72 hours (48 hours from the last data read of the day). Data must be sent to Oracle Utilities in the right schema and according to the Oracle Utilities Opower Interval Data Transfer Standards.
Data Requirements	**Billing Data**: Billed usage data from the utility is required. **AMI Data**: The customer must have AMI data for the last two weeks. Hourly or more granular data is required. Weekly Energy Updates will not be sent without this level of data granularity. **Customer Contact Information**: The utility must be able to provide contact information for the customer if auto-enrollment is being used. **Email Address**: The customer must have a valid email address.

Category	Description
Data Coverage	By default, at least 50% coverage is required for the last two weeks, the highest day in the customer's last week, and the last day of the week.
Supported Fuels	Electric-only, gas-only, and dual-fuel customers are supported.

Other Limitations

- **Customer Service Limitation**: Customer Service Representatives may not be able to determine why a customer did not receive a Weekly Energy Update. In such cases, an issue should be logged in My Oracle Support.
- **Service Points Limitation**: The customer must only have one service point for each meter type. For example, dual-fuel customers must have exactly one electricity and one gas service point, while single-fuel customers must only have one service point.

Customer Experience

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

Customers can receive different types of Weekly Energy Update emails: standard Weekly Energy Updates and Cost Tracker emails. See Report Types for more information.

Report Types

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

- Standard Weekly Energy Update Emails
- Cost Tracker Report Emails

Standard Weekly Energy Update Emails

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

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

- Business Profile
- User Feedback
- Footer

The following standard Weekly Energy Update report types are supported:

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

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

UtilityCo

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

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

Taylor Edward Hopper Car Detailing

Why am I receiving this?

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

Here's what to expect:

1. **Energy use insights *every week***
   You can learn about your energy use over time and see trends.

2. **Personalized ways to save**
   You'll get helpful tips chosen specifically for your business.

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

Cost Tracker Report Emails

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

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

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

UtilityCo

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

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

Taylor Edward Hopper Car Detailing

Why am I receiving this?

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

Here's what to expect:

1. **Energy use insights *every week***
   You can learn about your energy use over time and see trends.

2. **Personalized ways to save**
   You'll get helpful tips chosen specifically for your business.

You're trending higher this bill period than the same period last year

Subject Line, Header and Footer

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

Requirements and Limitations

This section lists the requirements and limitations.

Requirements

Same as listed in Requirements and Limitations.

Limitations

Unsubscribe: Unsubscribing through the link provided in the email might be permanent, depending on how utility account preferences and unsubscribe policies are set up and configured. Contact Your Delivery Team for additional information.

User Experience

This section describes the user experience for subject line, header, and footer components of the Weekly Energy Update email.

Subject Line

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

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

Header

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

Footer

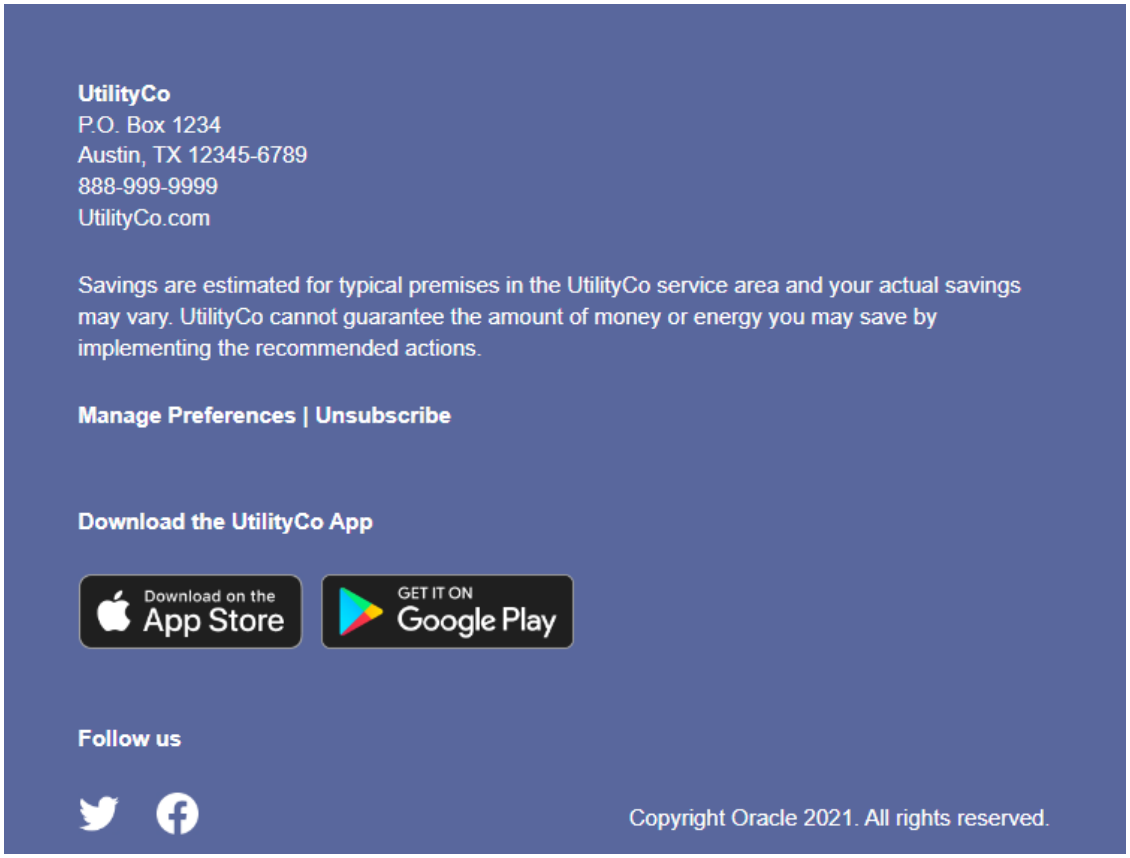
The footer includes components that provide more context about the alert. These components include:

- An unsubscribe link
- A manage preferences link

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

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

The image below is an example of the Footer module.



User Experience Variations

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

Subject Line Variations

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

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

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

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

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

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

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

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

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

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

Email Title Variations

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

Introduction

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

Requirements and Limitations

This section lists the requirements and limitations.

Requirements

Same as listed in Requirements and Limitations.

Limitations

Same as listed in Requirements and Limitations.

User Experience

The Introduction module for the Weekly Energy Update email includes the following:

Subject: Addresses the customer by their first name, then informs them about their weekly energy usage. By default, the subject statement reads: "<first name>, Here's your weekly business electricity update for <month XX-XX, XXXX>"

Date Range: The date range following the subject tells the user the dates associated with the billing period.

Business Name: When available, the customer's full business name is displayed below the subject statement.

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

First Name and Business Name

The Introduction module relies on data provided by the utility in order to generate the subject's first name (which appears at the top of the module) and the full business name (which appears below the subject statement). The user experience of this module may vary depending on how the data is provided.

If the utility fills in the `first_name` column of their data specification with a business's full name, then the opening line of the subject statement would use that input to address the business customer. For example, the module may state: "Taylor Edward Hopper Car Detailing, here's your weekly business electricity update."

Welcome

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

Requirements and Limitations

This section lists the requirements and limitations.

Requirements

Same as listed in Requirements and Limitations.

Limitations

Same as listed in Requirements and Limitations.

User Experience

The Welcome module is sent as part of each business customer's first Weekly Energy Update email. The messaging welcomes the customer to the weekly communication they are signed up for, and explains why they are receiving it.

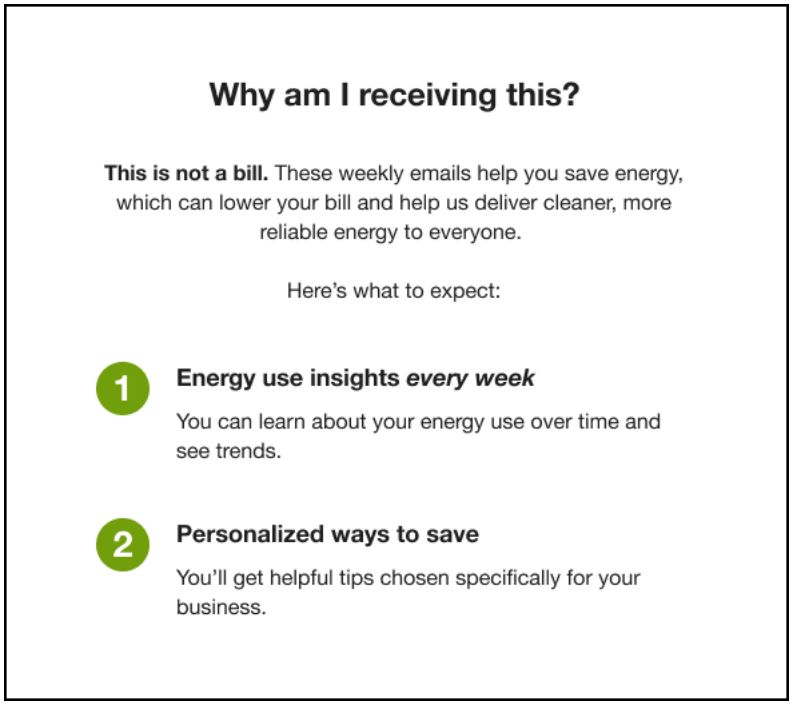
This module includes the following:

Header: Question that focuses on the purpose of the email.

Disclaimer: Text that tells the user that the Weekly Energy Update email is not a bill, and that the objective of the communication is to help them save energy.

What to Expect information: A description saying that the business customer will receive energy use insights and tips in ways to save.

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



Weekly Comparison

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

Note: The Weekly Comparison module is not included in Cost Tracker Report emails.

Requirements and Limitations

This section lists the requirements and limitations.

Utility Requirements

Same as listed in Requirements and Limitations. Additionally, utility rates must be modeled by Oracle Utilities for cost information to appear. If rates are not modeled, energy use information is displayed by default. If the utility chooses to display cost information, rate modeling is required during initial program setup for an additional fee. See the Oracle Utilities Opower Rates Engagement Cloud Service Product Overview for more information.

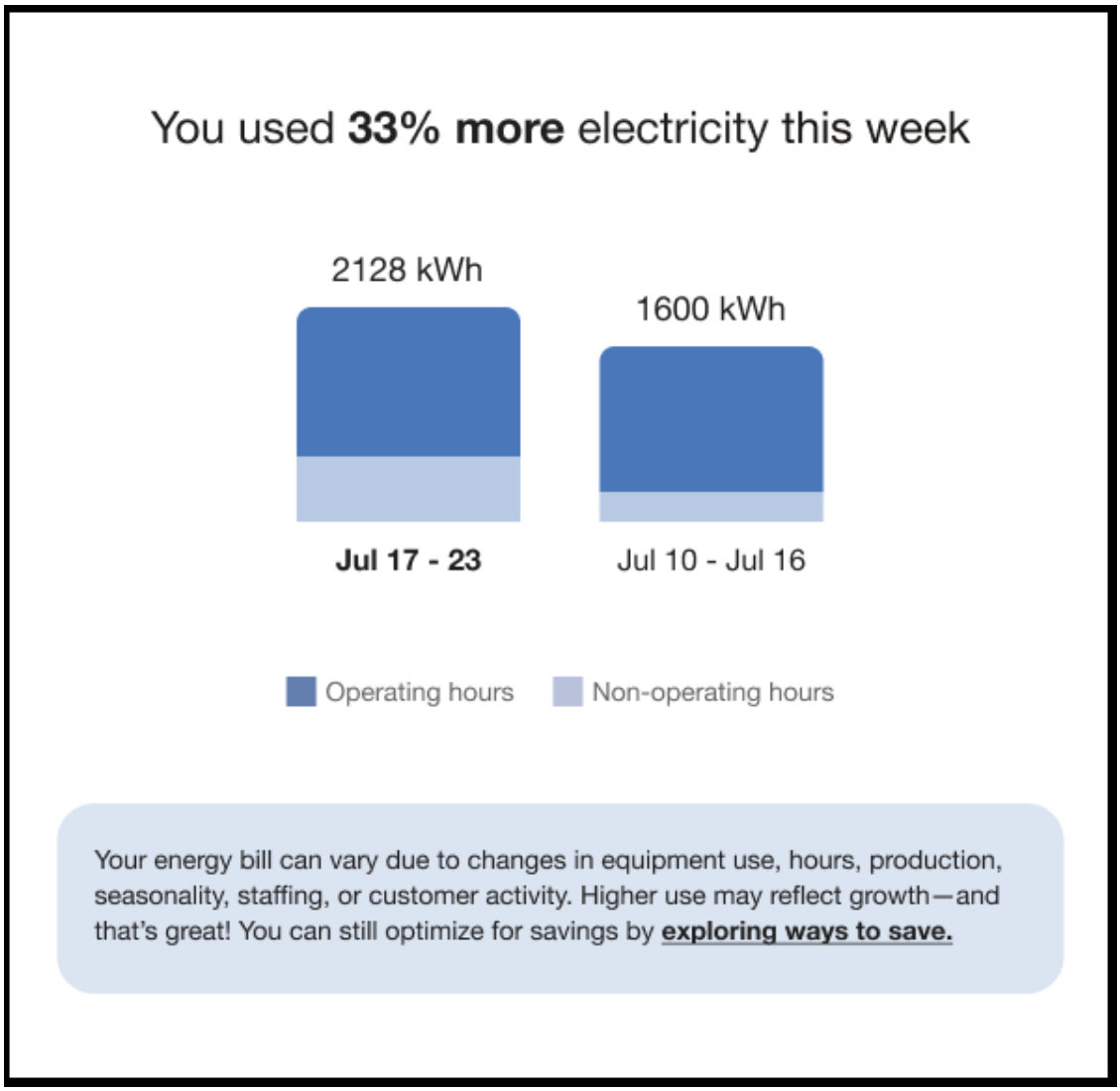
Customer Requirements

Same as listed in Requirements and Limitations. Additionally, customers must have the following for this module to generate:

- At least one electric and one gas service point.
- Weekly information available for both fuels.
- AMI data for the last two weeks.

User Experience

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



Insight Statement: An insight statement at the top of the module explains how the customer's energy use in the current week compares to their use last week in terms of a percentage increase or decrease.

Insight Statement Icon: An icon appears next to the insight statement. If the customer used more energy during the current week than the previous week, no icon is displayed. If the customer used less energy during the current week than the previous week, a green check mark in a circle is displayed.

Bar Chart: The Weekly Comparison displays a visual usage comparison between the customer's usage during the current week and the previous week. Usage per week is displayed in a bar chart, with bars that indicate the date ranges covered in the chart.

Operating Hours: If the business customer specified their operating hours in their Business Profile, the Weekly Comparison module highlights for the customer how much energy was consumed during operating hours, in contrast to the usage during non-operating hours.

User Experience Variations

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

Gas-Only

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

Dual Fuel

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

Rates Modeled

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

Cost Tracker

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

Note: The Cost Tracker module is not included in Standard Weekly Energy Update emails.

Requirements and Limitations

This section lists the requirements and limitations.

Requirements

Same as listed in Requirements and Limitations.

Limitations

Same as listed in Requirements and Limitations.

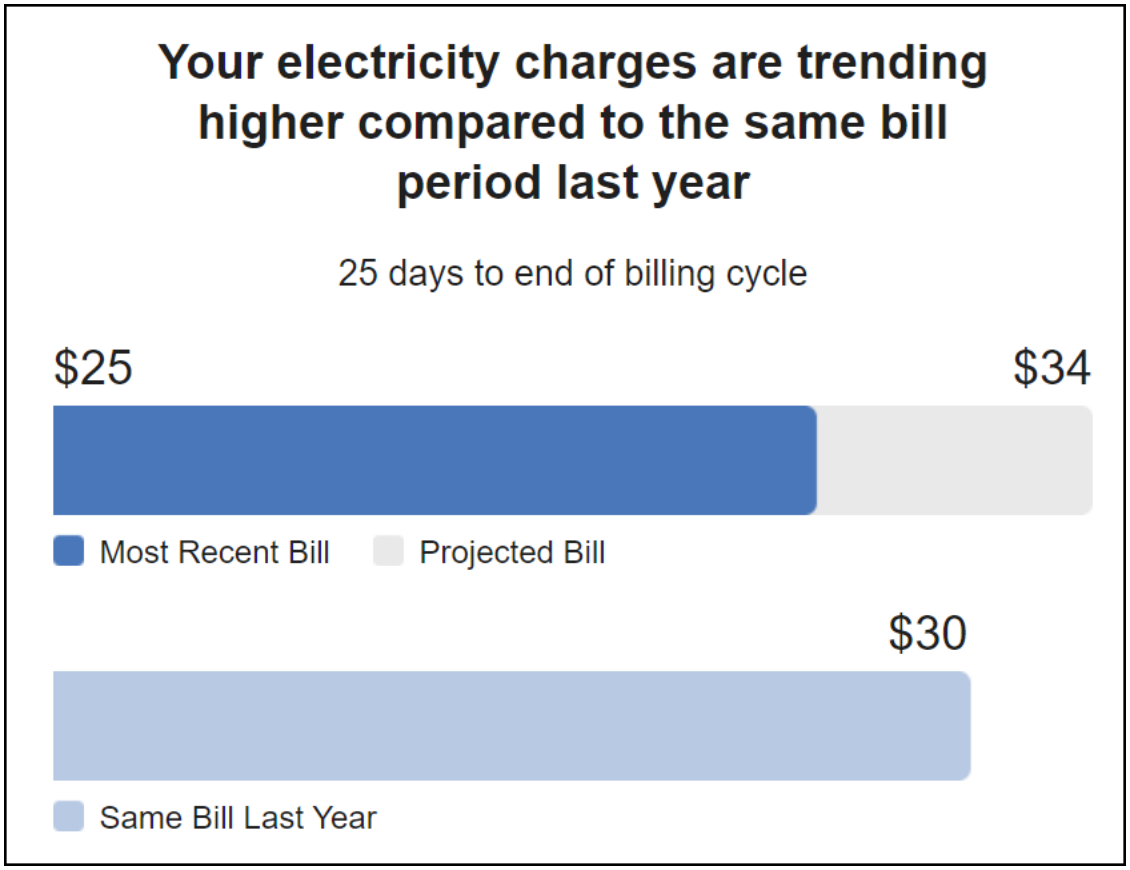
User Experience

The Cost Tracker module is composed of the following:

Insight Statement: The current billing period projection is used to provide an insight statement of whether the user is projected to have a higher bill, lower bill, or spend about the same as compared to the same bill from last year. The time left until the end of the billing cycle is also provided.

Bar Chart: A bar chart comparison of energy costs for the current billing period and the same billing period from last year is displayed. The energy costs incurred so far in the billing cycle are provided along with a projection of energy costs at the end of the billing cycle.

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



User Experience Variations

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

Gas-Only

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

Dual Fuel

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

Rates Not Modeled

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

Calculations

The Cost Tracker insight is generated by displaying the customer’s energy use or costs for the week, a projection of what the customer is forecast to use by the end of the billing period, along with a bill or energy use from the same bill period last year. The customer’s current energy use information is collected through their AMI data. If the customer’s rate is available,

the rate is multiplied by energy use to determine cost. Otherwise, energy use is displayed. The insight calculates the projected difference to alert the customer as to whether they are projected to use more energy, use less energy, or use about the same amount of energy.

Business Usage Disclaimer

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

Requirements and Limitations

This section lists the requirements and limitations.

Requirements

Same as listed in Requirements and Limitations.

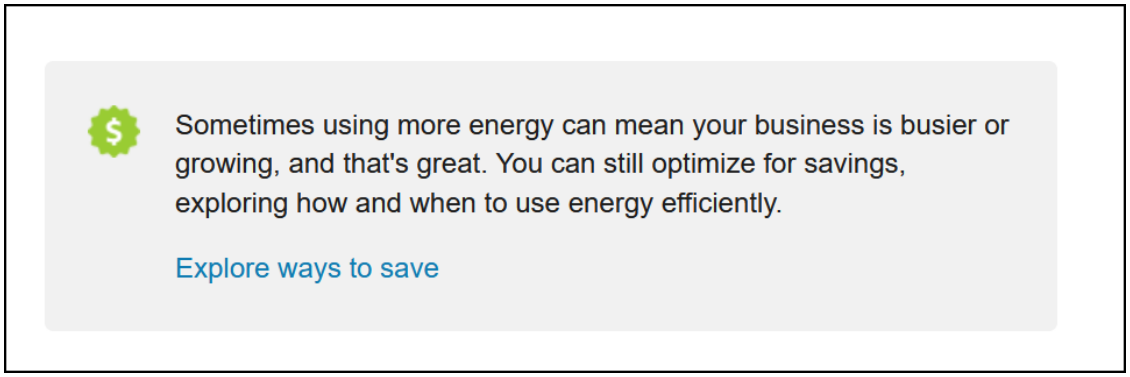
Limitations

Same as listed in Requirements and Limitations.

User Experience

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

The following is an example of the Business Usage messaging:



Usage Disclaimer: Text that acknowledges that using more energy can sometimes be an indication of business growth, and encourages the business customer to continue exploring ways to save.

Explore Ways to Save: Business customers can click this button to view more detailed tip information in the **Ways to Save** page in the Oracle Utilities web portal.

Bill Forecast

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

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

Requirements and Limitations

Utility Requirements

Same as listed in Requirements and Limitations. Additionally, utility rates must be modeled by Oracle Utilities for cost information to appear. If rates are not modeled, energy use information is displayed by default. If the utility chooses to display cost information, rate modeling is required during initial program setup for an additional fee. See the Oracle Utilities Opower Rates Engagement Cloud Service Product Overview for more information.

Customer Requirements

Same as listed in Requirements and Limitations. Additionally, the following module-specific requirements apply:

- **Data History**: The business customer must have AMI data back to the beginning of the current bill period. One historical bill, from any billing period, is required to determine where the customer falls in the billing cycle for a given date.
- **Data Coverage**: The business customer must have non-null reads for 75% of the total possible reads over both the last seven days as well as the total reads-to-date.

Limitations

Same as listed in Requirements and Limitations. Additionally, the following module-specific limitations apply:

- **Cost Information Automatically Displayed**: Unlike other modules in the email, the Bill Forecast automatically displays cost information for eligible business customers.
- **AMI Data Used**: The AMI data used in the rest of the email is based on the data available as of Sunday, but the bill forecast in the email is based on the latest data available at the time that the email is generated. This may result in minor discrepancies between the bill forecast and the rest of the Weekly Energy Update.

User Experience

The Bill Forecast module includes the following components:

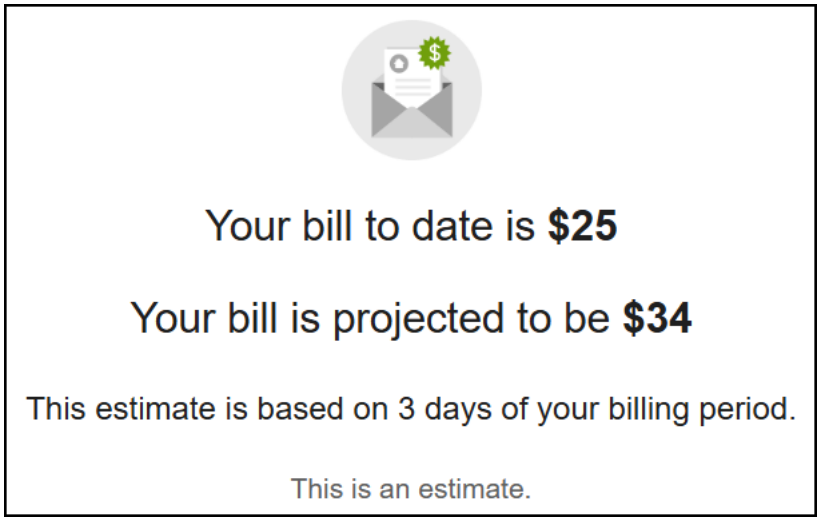
Bill to Date: The bill to date provides the current charges for a customer's bill so far in the billing cycle. Cost information is automatically displayed if rates are modeled.

Forecast Statement: The forecast statement projects how much the customer's bill could be if they continue their current energy-spending behavior through the end of the billing period. The forecast is based on the estimated length of the bill. Cost information is automatically displayed if rates are modeled.

Estimation Statement: It is clearly stated that the forecast is an estimate to assure customers that their actual billed usage amount may be different. The estimate does not include taxes and fees.

Days Remaining: The number of days remaining in the billing period is shown to reinforce the idea that the customer still has time to save energy.

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



Calculations

The forecast calculation relies upon Oracle Utilities Opower receiving a sufficient amount of energy use data for the customer. The customer must also meet the minimum eligibility criteria for the forecast, including the availability of at least one historical bill.

At a high level, the bill forecast calculation involves the following steps:

1. Calculate the baseline cost that the customer pays for using energy.
2. Estimate the customer's billing period end date.
3. Calculate how much energy the customer has used to date.
4. Take the customer's energy use and project it forward to the billing period's end date.
5. Convert the resulting energy use values to cost values, based on the customer's rate plan. The output is an actual cost value (to date) and a projected cost value (going forward).

Day By Day and Hourly Breakdown

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

Requirements and Limitations

This section lists the requirements and limitations.

Utility Requirements

Same as listed in Requirements and Limitations. Additionally, utility rates must be modeled by Oracle Utilities for cost information to appear. If rates are not modeled, energy use information is displayed by default. If the utility chooses to display cost information, rate modeling is required during initial program setup for an additional fee. See the Oracle Utilities Opower Rates Engagement Cloud Service Product Overview for more information.

Customer Requirements

Same as listed in Requirements and Limitations.

User Experience

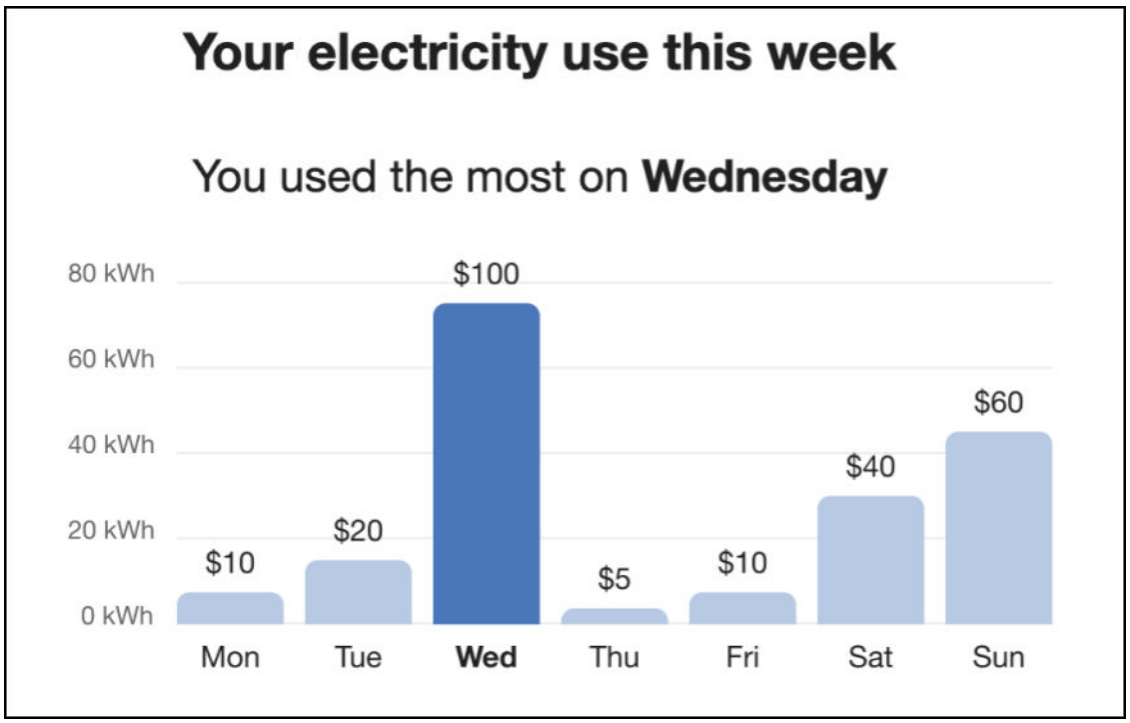
The Day-by-Day and Hourly Breakdowns communication specifies for the business customer both their daily consumption from the previous week, and the time of day with the highest usage within the highest-usage day. Also, consider the following:

- If the customer's rates are modeled, the cost per day can be displayed below each bar in the day-by-day graph.
- If the customer filled out the Operating Hours section in their Business Profile, then the bar charts will add visual contrast in the bars to differentiate between operating and non-operating hours.
- Dual fuel versions of the communication include graphs for both electricity and gas use.

For more details, see User Experience Variations below.

Day-by-Day Breakdown

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



Title: Specifies the fuel type for the weekly breakdown.

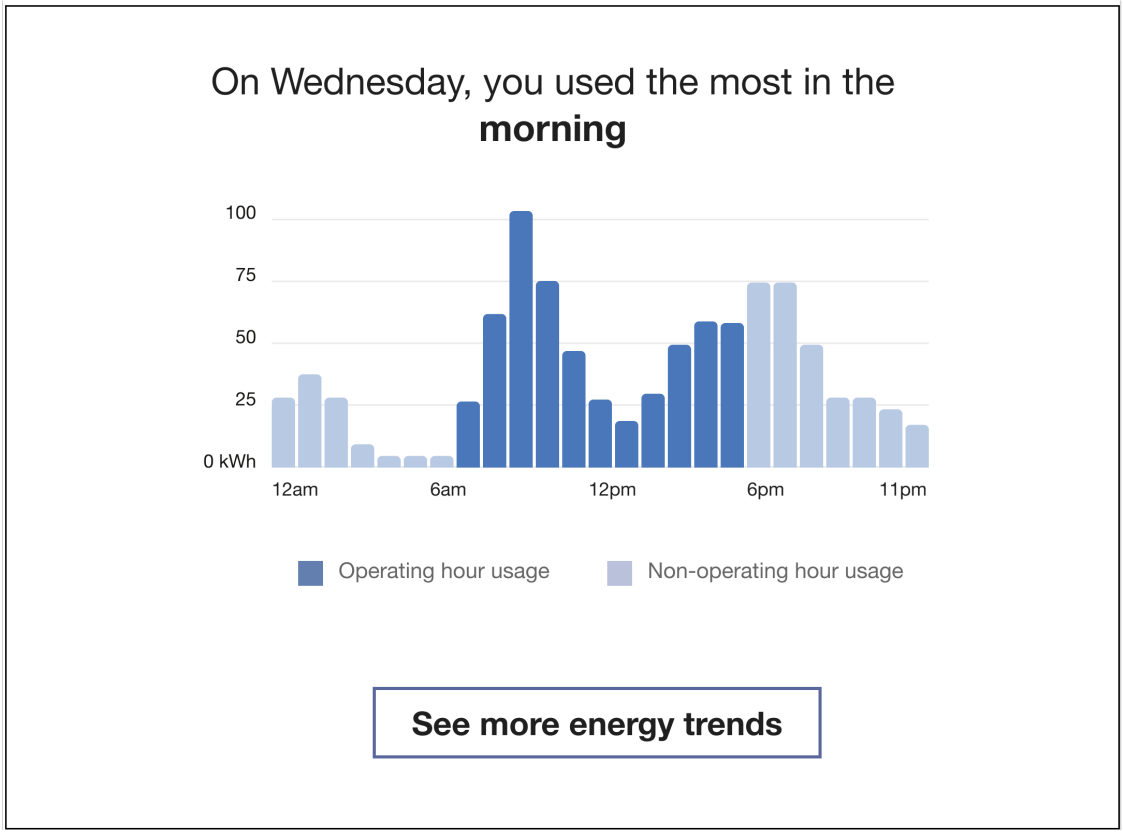
Insight: The insight below the title indicates the day on which the customer used the most energy. The goal of this insight is to encourage the customer to think of ways to avoid using as much energy on the same day in future weeks.

Bar Chart: The bar chart shows the amount of energy used on each day for the previous week. The bar chart starts on Monday and ends on Sunday of the previous week. Each bar represents a day, with the day of the week displayed under the bar. The larger the bar, the higher the customer's energy usage for that day. The chart shows also each day's energy usage cost, relative to the other days in the same week.

Hourly Breakdown

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

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



Insight Statement: An insight statement at the top of the module indicates the hours of the customer's highest-usage day during which they used the most energy.

Bar Chart: The Hourly Breakdown displays a bar chart showing a customer's usage throughout the day for the day when they used the most energy. This makes it easy for the customer to compare their highest hourly usage to their lowest, to notice patterns in their usage, and to begin to form habits to change these usage patterns. The bar chart plots hourly usage over a 24 hour period, starting and ending with 12 AM.

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

User Experience Variations

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

Title

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

Subtitle

- “You used the most on <day>"

Gas-Only

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

Dual Fuel

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

Rates Modeled

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

Operating Hours

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

Personalized Tips

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

Requirements and Limitations

This section lists the requirements and limitations.

Requirements

Same as listed in Requirements and Limitations.

Back to Top

Limitations

Minimum Number of Tips: The customer must be eligible to receive at least three tips for this module to display. If the customer is eligible for fewer than three tips, this module is not displayed.

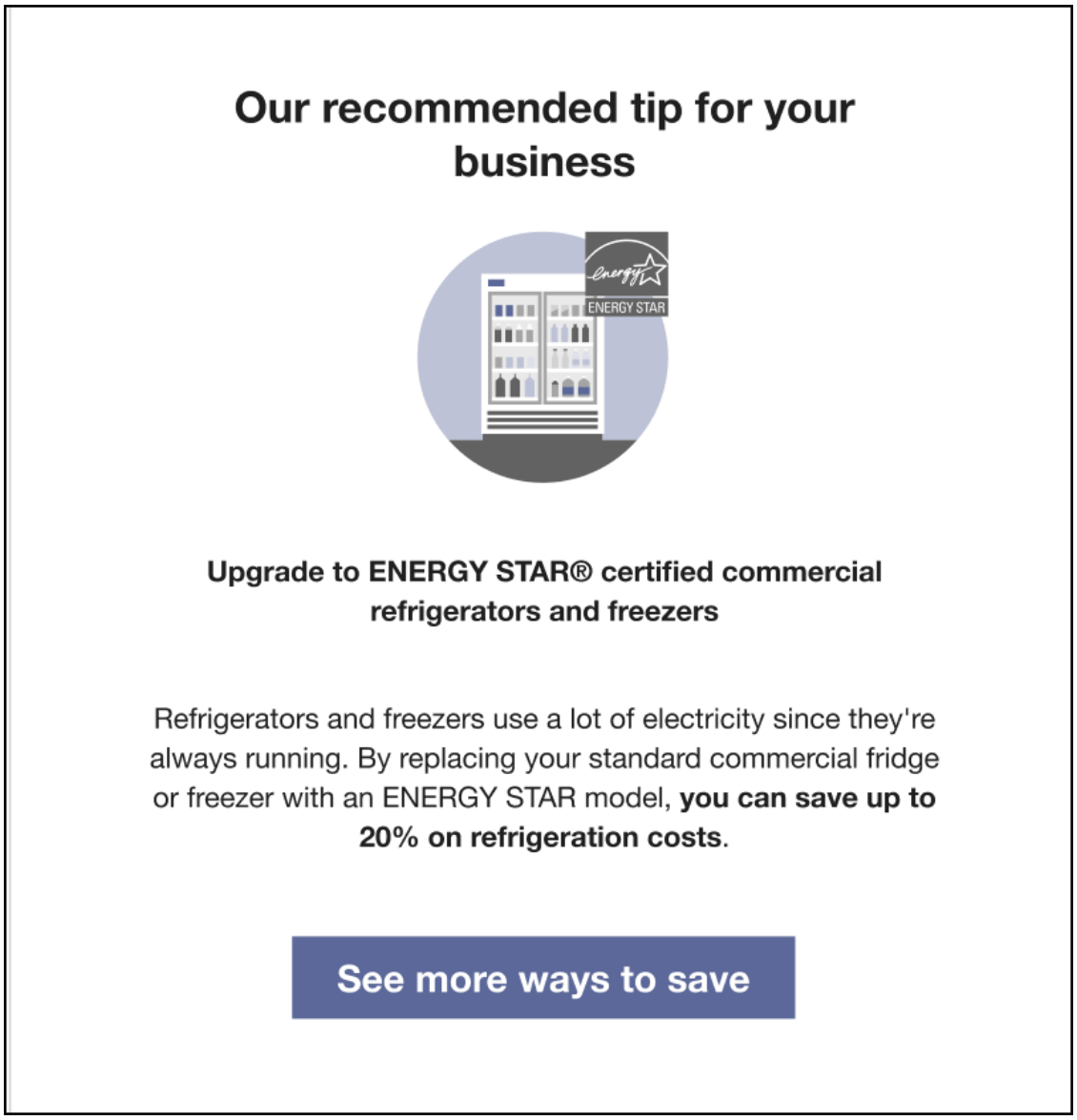
User Experience

The Personalized Tips module is displayed when the business customer is eligible for one or more tips. This module finds tips that the business customer is eligible for, and chooses one

recommendation tip to display every week in the Weekly Energy Update. The business customer may see the same tip repeated in future emails.

When business customers have completed their Business Profile, which includes entering their business type, they become eligible to receive business type-related tips. For example, if the customer's business type is *restaurant*, they may get a restaurant-specific tip, and they will be excluded from tips that are specific to other business types (such as offices). However, there will still be generally-relevant tips available as well.

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



Tip Content: The tips that are displayed offer customers a range of advice about how to reduce their energy usage. Some tips, such as turning off the lights when leaving home, do not require the customer to spend money. Some require more of an investment, such as buying ENERGY STAR appliances. Each tip generally includes the following elements:

- **Tip Title**: The heading tells the business customer that what follows is our top recommendation for their business.

- **Tip Summary**: Concise description of the recommendation.
- **Tip Explanation**: Text that explains the business customer why and how to follow the recommendation.
- **Tip Savings Amounts**: The message emphasizes the savings that the business customer could get by acting on the tip.

The tips also change as the customer's energy needs change. For example, a customer will only see information about reducing cooling costs during seasons that require them to use their air conditioner.

See more ways to save: Clicking this button directs the customer to the **Ways to Save** page in the Oracle Utilities web portal.

Marketing Message

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

Requirements and Limitations

This section lists the requirements and limitations.

Requirements

Same as listed in Requirements and Limitations.

Limitations

Same as listed in Requirements and Limitations.

User Experience

Marketing modules encourage customers to take advantage of utility-specific or Oracle Utilities-specific products or programs. The modules are selected from a library of content that has been tested to optimize conversions and satisfaction. Small edits can be made to the text and visuals. For example, the modules can be customized to promote utility-specific programs (such as a home audit), products or features, processes, rebates, calls to action (URL, phone number, or both), and more.

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

Business Profile

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

Requirements and Limitations

This section lists the requirements and limitations.

Requirements

Same as listed in Requirements and Limitations.

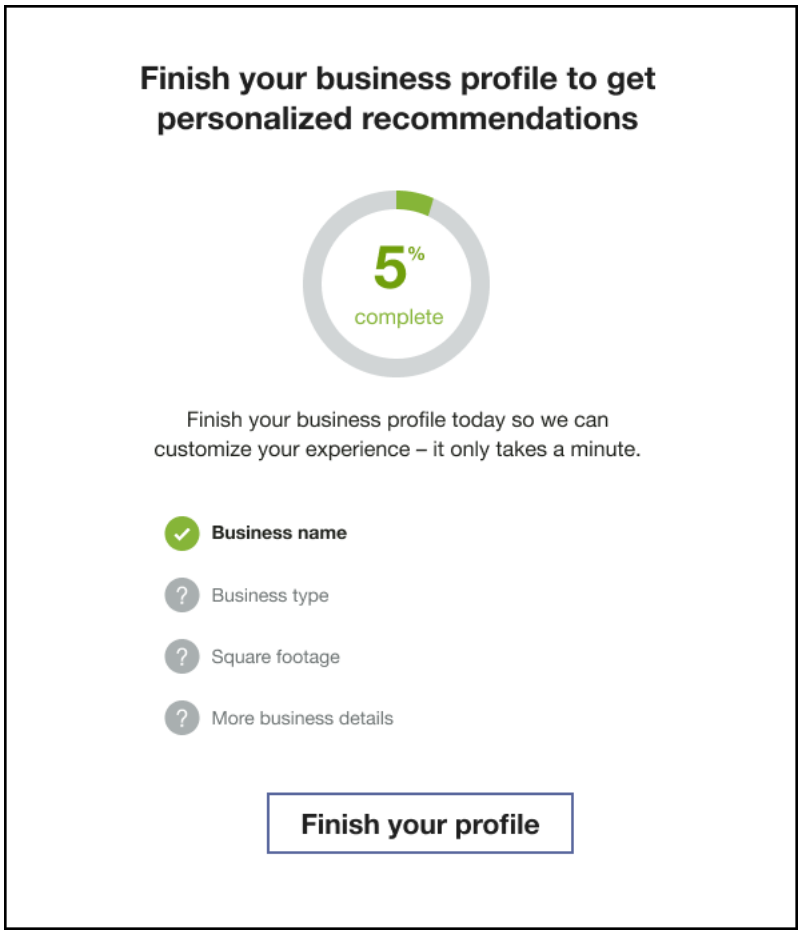
Limitations

Same as listed in Requirements and Limitations.

User Experience

If the business customer has not yet completed their business profile, this module is displayed to motivate them to finalize their profile so they can get more personalized recommendations.

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



Introduction: Message that encourages the business customer to complete their profile, in order to get personalized recommendations.

Progress Wheel: Progress wheel graphic that represents the current business profile's completion percentage.

Explanation: Text that reiterates the action to take.

Profile Items: The module displays the main items to be addressed in the business profile, and indicates graphically which items are still pending.

Finish your profile: Button for the user to access their online business profile.

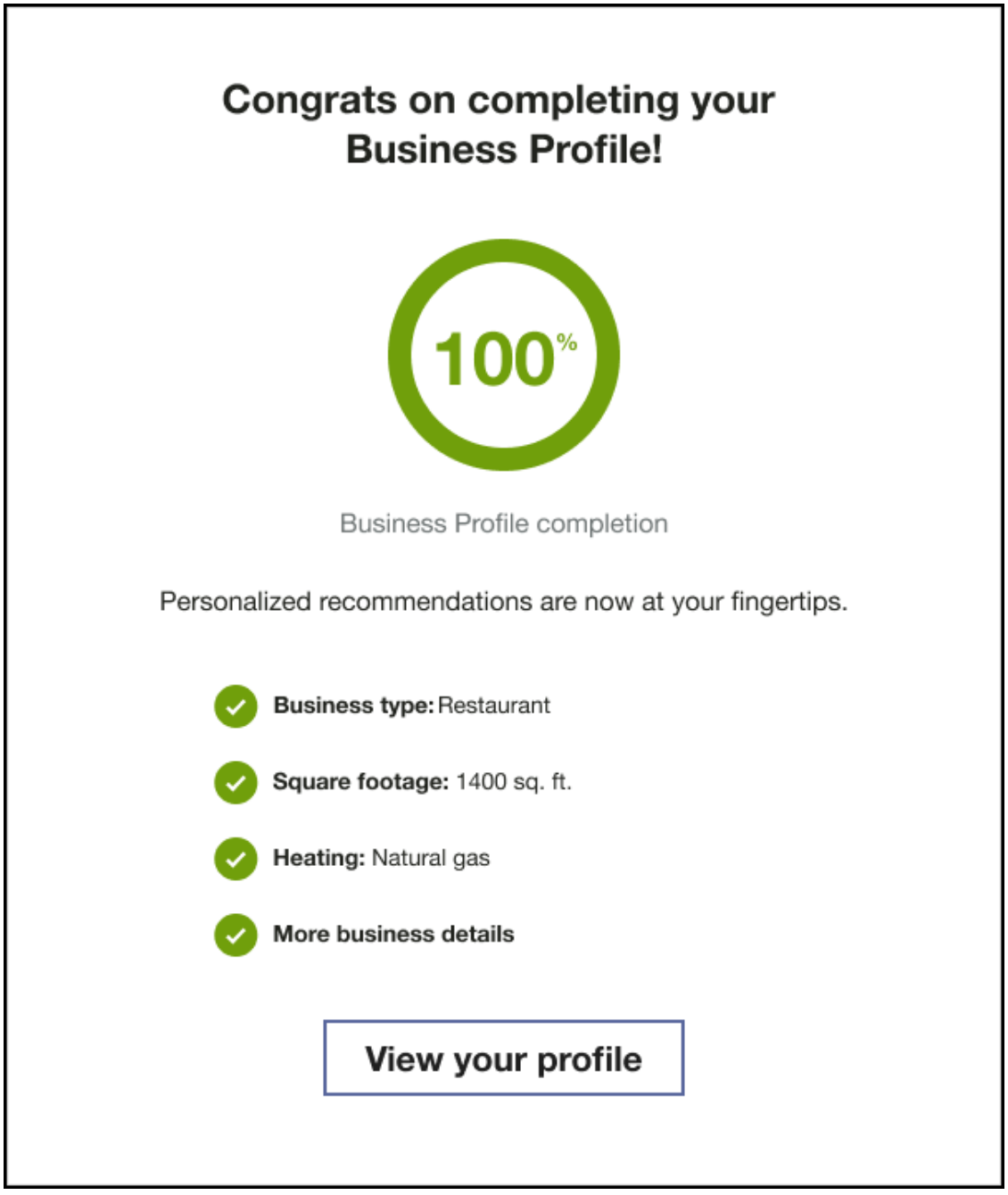
User Experience Variations

The user experience varies for customers depending upon how much of their profile they have completed.

Business Profile Completed

When the business user's business profile is completed, the messaging updates accordingly, and the progress wheel shows a 100% completion percentage. This variation will display for the customer only once after completion.

The following is an example of the Business Profile module after profile's completion.



User Feedback

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

Requirements and Limitations

This section lists the requirements and limitations.

Requirements

Same as listed in Requirements and Limitations.

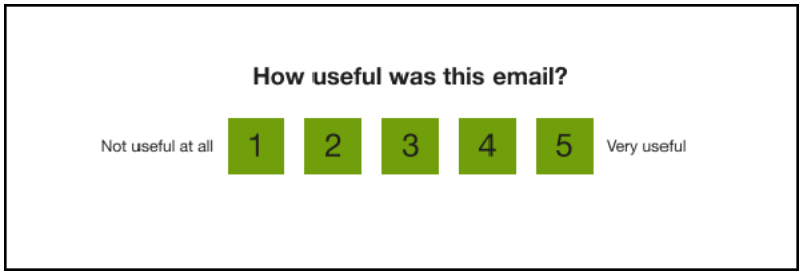
Limitations

Same as listed in Requirements and Limitations.

User Experience

Business customers can indicate how useful they found the email on a scale from 1 to 5. After submitting their feedback, customers can be directed to a confirmation page where they are thanked for their input. The page also informs customers that their feedback is used to make improvements to the product.

This image shows an example of the User Feedback module:



Enrollment

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

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

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

Delivery

This section provides general information about the delivery of the Weekly Energy Updates, such as the frequency of delivery, what defines a "weekly cycle," the timing for the delivery day, and customer email preferences.

Frequency: The Weekly Energy Update email is sent weekly.

Weekly Cycle: The weekly cycle for the emails starts on Monday at 12:00:00 AM (midnight) and ends on Sunday at 11:59:59 PM. Emails are sent to customers as soon as possible after the end of a weekly cycle. Basing communications on a weekly basis is consistent with how customers typically think about their business schedules, and allows them to better analyze their weekday usage against their weekend usage. Weekly cycles and billing cycles are independent of one another. A weekly cycle may contain the end of one billing cycle and the beginning of another.

Emails are not sent any later than 96 hours, or four days, after the end of the weekly cycle. For example, if the weekly cycle covers Monday morning through Sunday night, an email will not be sent later than the following Thursday night. (This expiration parameter can be configured for each utility.) Emails are not sent to customers whose data is either unavailable or does not become available until after the expiration.

Delivery Day: Ideally, customers will receive their Weekly Energy Update shortly after the end of a weekly cycle. This is typically 2-4 days after the data is received by the utility.

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

Analytics: Oracle Utilities uses an analytics tool to collect information on the number of bounces, opens, opt-outs, and click-throughs.

Email Preferences: Customers who enroll in the program through the Oracle Utilities web portal can sign up to receive Weekly Energy Updates at a single email address. Customers can be enrolled to receive the email at multiple email addresses through the Customer Notification API. See the *Oracle Utilities REST API for Digital Self Service Energy Management* for more information.

Providing Customer Support

Customer Service Representatives can do the following in the Oracle Utilities Opower Customer Service Interface (CSI) to assist with customer inquiries related to alerts:

- Review copies of alerts sent to customers
- Manage a customer's alert preferences (including unsubscribing them)
- Access a customer's Oracle Utilities web portal account and view and update their alert settings

See Supporting Business Customer Engagement Proactive Alerts for details.

4

Customer Service Interface - Program Management

This cloud service includes access to the Customer Service Interface - Program Management tool. The Customer Service Interface (CSI) is an online support tool that provides utility support staff with the information and functionality they need to manage the Oracle Utilities Opower program and answer customer questions. See the Oracle Utilities Opower Customer Service Interface - Program Management Product Overview for details.

5

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.