# Oracle Utilities Opower Customer Service Interface

## Opower Bill Advisor Product Overview

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# Oracle Utilities Opower Bill Advisor Cloud Service Overview

Welcome to the Oracle Utilities Opower Bill Advisor cloud service overview. Use this information to learn about the capabilities of the product. Have a question? Contact Your Delivery Team or visit My Oracle Support.

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# Getting Started

The Customer Service Interface (CSI) Cloud Service includes a **Bill Advisor** tool that enables Customer Service Representatives (CSRs) to more effectively resolve high-bill inquiries. The following components are available in this service:

- Customer Service Interface - Bill Advisor
- Inside Opower

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. For an overview of additional functionality available in the CSI, see the Oracle Utilities Opower Customer Service Interface - Program Management Product Overview.

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# Customer Service Interface - Bill Advisor

The Bill Advisor tab in the CSI is a set of features and insights that have been specifically designed to help CSRs resolve high-bill inquiries. Bill Advisor lets users search for and view basic customer information, compare a customer's current bill to previous bills, view long-term energy use and weather trends, and send follow-up emails to thank customers for their time.


## Requirements and Limitations

The following requirements and limitations apply to all utilities using Bill Advisor.

- **General CSI Requirements:** See the Oracle Utilities Opower Customer Service Interface - Program Management Product Overview for details about the CSI data requirements and limitations that are not specific to the **Bill Advisor** tab.
- **Billing Frequency**: Monthly, bi-monthly, or quarterly billing cycles are required.
- **Data Requirements**: Customer energy use and billing data is required. Advanced Metering Infrastructure (AMI) data is optional. AMI data can be used to enable features that work with daily and subdaily energy use data.
- **Data Delivery Frequency**: Daily delivery of data is preferred. Weekly delivery of data is acceptable.
- **Data History**: At least 13 months of data is highly preferred for optimal use of Bill Advisor features.
- **Fuel Types**: Gas, electric, and dual fuel.
- **Billed Usage Charges versus Total Bills**: The bill amounts displayed in Bill Advisor are dependent on which charges the utility includes in their existing billing data feed to Oracle Utilities. Most utilities only provide base and usage charges. In these cases, taxes, fees, and other charges are not included in the bill totals displayed in Bill Advisor.
- **Web Browser Support**: The customer must use a supported web or mobile browser. Oracle Utilities Web products adhere to the Oracle Software Web Browser Support Policy.
- **Single Sign-On (SSO) Integration**: SSO integration and deep-linking between the utility call center's Customer Information System and the Oracle Utilities Opower system is recommended, but not required. SSO integration reduces the number of clicks and logins required to access Bill Advisor functionality and therefore increases the efficacy of the product. If the utility chooses not to use SSO integration, then CSRs will need to log in to the tool using the existing, standalone CSI authentication.
- **Training**: A separate training provided by Oracle Utilities is required for all CSRs using Bill Advisor. This training differs from the existing training sessions on how to use the **Program Management** section of the CSI.

# Customer Search

The Bill Advisor search tool allows CSRs to find and open a customer's account. Users can run a search based on the information below.

- **Customer Account Number**: The utility account number as it appears in the data transmitted to Oracle Utilities by the utility. This includes dashes, spaces, or any other characters included in the data. For the customer’s convenience, this number should match the account number located on their bill. If customers have more than one account number, additional fields will appear to allow users to search by any of the account numbers.
- **First Name and/or Last Name**: The account holder’s first and last name.

If the search returns one account, the account details appear. If the search returns more than one account, users can choose an account from the list of results to display the account details. CSRs may have the ability to search by email address. There may also be options to exclude inactive accounts or non-recipients of Home Energy Reports from the search results. The Bill Advisor product can display data for both recipients and non-recipients of Home Energy Reports.

## Exact Searches

Exact searches require the user to know the full account number, first name, last name, or email address (if applicable) of the customer. By default, the check box for using exact searches is selected.

## Wildcard Searches

Wildcard searches are enabled when the **Exact Name Matches Only** check box is cleared. A user may want to use a wildcard search when only a partial query term is available for a given search field. Wildcard searches can be performed on the account number, first name, and last name.

# Customer Information Module

The **Customer Information** module is a component of the Bill Advisor that displays a customer's basic account information after the account has been opened. This module contains the following information:

- **Account Number**: The unique identifier for the customer's account with the utility. This is usually the same account number that is located on the customer's bill.
- **Name**: The customer's first and last name.
- **Service Address**: The location at which the customer receives energy from the utility. This may or may not be the same as the customer's mailing address.
- **Mailing Address**: The location at which the customer receives postal mail. This may or may not be the same as the customer's service address.

# Home Profile Module

The Bill Advisor **Home Profile** module summarizes a customer's home attributes, such as the dwelling type, cooling mechanism, and year the home was built. This information helps CSRs better understand a customer's context, and it can be updated by CSRs so that the utility has the latest data. There is also a section where CSRs can write supplementary notes about the customer's situation, which is ideal for capturing information not provided by the standard attributes.

**Edit Icon**: Users can click an edit icon to switch to edit mode and update the customer's home attributes. After an update is made, a callout is displayed to show who made the update and when, so that CSRs can advise customers on the accuracy of the information and determine if it needs editing. If a customer makes an update to their home attributes (for example, by updating their profile or by using the Oracle Utilities Opower web-based home energy audit tool), that update is reflected in the home profile widget, and the callout indicates that the customer is the one who made the change.

> **Note**
>
> Any edits made to the home profile information will automatically be applied to other Oracle Utilities Opower products that use the same home profile information.

**Home Attributes List**: The default list of attributes is shown below. The list can be configured to enable or disable attributes based on what is most relevant to a utility's customers.

- **Owner or renter**: Whether the customer rents or owns the home.
- **Cooling mechanism**: How the customer cools their home, such as central air conditioning, fan, or window units.
- **Living area**: The size of the home.
- **Dwelling type**: The home type, such as apartment or single family home.
- **Has pool**: Whether the customer has a pool on their property.
- **Year built**: The year the home was built.
- **Heating type**: How the customer heats their home, such as gas or electric.
- **Notes**: A blank section where other useful details about the customer can be added to help a CSR understand a customer's energy use. For example, this section is a good place to indicate if a customer is home all day or has a large appliance.

# Bill Comparison Module

The **Bill Comparison** module is a component of the Bill Advisor interface that provides CSRs with a concise summary of the customer's bill and how it compares to last month's bill, as well as to the same month's bill of the previous year.

**Fuel Selector and Date Range**: A selector at the top of the module shows which fuel type is being viewed (electricity or gas) and allows the CSR to switch to a different fuel. Arrow icons on either side of the date range allow CSRs to view comparisons for other billing periods.

**Notification Banner**: The following notifications may be displayed in a banner at the top of the module. These notifications are designed to help CSRs more effectively target their answers to the customer's situation and expedite the call.

- **Estimated Bill Notification**: A notification is displayed whenever the selected bill is an estimate. An estimated bill is an approximate monetary amount that is calculated based on the energy that a customer has consumed in the past, rather than the energy that the customer has consumed in the present billing period. Estimated bills are calculated when unusual circumstances prevent Oracle Utilities from obtaining meter reads for the customer.
- **Program Enrollment Notification**: A notification is displayed if the customer was enrolled in one or more utility programs during the selected bill period. For example, a customer may have enrolled in a solar power program or a low-income payment plan with their utility. Such programs may give customers a discount on their energy use and thereby affect their bill.

**Bill Period Data Overview**: The module displays relevant information about the selected bill period. This information includes the cost of the energy used (without fees or taxes included), the amount of energy used, the average temperature for the period, and the length of the period.

**Comparison to Last Month**: A comparison statement describes why the customer's bill is more or less than last month. For example, the statement may say, "Compared to **last month**, the bill was **$24 more** due to weather." A CSR can click a link to the right of the statement to show more information. The drop-down displays a comparison bar chart and a table that compares the following elements:

- **Programs**: An indication of whether the customer enrolled in a utility program or is no longer enrolled in a program. This row is not displayed if there is no applicable program change. A tooltip is available to show the programs that are available at the utility. See Program Enrollment Notification above for more information about utility programs.

- **Rates**: The energy cost per kWh, therm, or so on for each compared bill period. The value displayed is a calculation that includes specific rate variations, such as tiers or time of use, that may be part of a customer's rate plan. A tooltip is displayed that describes the rates calculation.
- **Weather**: The average temperature in each compared bill period.
- **Bill Period**: The number of days in each compared bill period.
- **Energy Use**: The total amount of energy (electricity or gas) consumed in each compared bill period. A tooltip is displayed next to this element that calculates a customer’s average energy use for each day in the billing period. CSRs can hover over this tooltip to view a more granular insight about how the customer's average daily energy use differed between the compared bill periods.

**Comparison to Last Year**: A comparison statement is shown that describes why the bill is more or less than the same month last year. For example, the statement may say, "Compared to **last year**, the bill was **$4 less** due to lower electricity use." A CSR can click a ink to the right of the statement to show more information. The drop-down displays a cost comparison bar chart and a table that compares weather, energy use, and bill period length.

# Energy History Module

The **Energy History** module is a component of the Bill Advisor interface that provides CSRs with a user-friendly, interactive view of a customer's energy use costs and trends over time. This information is displayed as a bar chart overlaid with a line chart of temperature data to show potential correlations between energy use and weather patterns. By default, the module displays cost or energy use data for the current bill period and up to the previous 12 bill periods, for a total 13-month historical view, depending on the availability of historical data for the customer. A toggle allows CSRs to switch to a table view of the information, if desired.

**Fuel Selector**: A selector at the top of the module shows which fuel type is being viewed (electricity or gas) and allows the CSR to switch to a different fuel, if applicable.

**Service Point Selector**: If a customer has multiple service points for a single fuel type, a service point selector is displayed above the graph. Customers can use this selector to view data associated with a different service point. (For example, a customer may have one electric service point for their home and a separate electric service point for an electric vehicle, shed, or pool.) Only the last four digits of the service point number are displayed.

There is currently not a way to specifically identify the purpose for which a service point is used. For example, a service will not be labeled as representing a customer's house, electric vehicle, shed, or pool. A customer should go to their energy bill for reference, since most energy bills will list the customer's full service point numbers.

**Costs or Energy Use Selector**: A selector above the module allows CSRs to switch between a costs view or energy use view of the data.

- **Costs View**: This view displays total dollar amounts for each bill in the data display. The dollar amounts are rounded up to the nearest whole dollar. Note that this view is only available at the monthly level. If a customer generated more energy than they consumed due to photovoltaic (PV) or solar power, then there are visual cues and messaging to show that the customer earned a bill credit.
- **Energy Use View**: This view displays total energy use amounts for each bill in the data display (kWh for kilowatt hours or thm for therms). If a customer generated more energy

than they consumed due to PV or solar power, then there are visual cues and messaging to show that the customer sent energy back to the grid and therefore has a negative read.

**View Selector**: A selector above the data display allows CSRs to switch between a year view, bill view, and day view. The data shown varies depending on the view. Note that the bill and day views are only available for customers with interval data (also known as AMI data).

**Date or Time Selector**: Across the top of the module, the date range is shown. Arrow icons on either side of the date range allow CSRs to navigate through historical data for periods other than the most recent.

**Graph or Table Selector**: A selector above the module allows CSRs switch to between a graph view and a table view of the customer's energy use trends. The graph view is selected by default, but the module can be configured so that the table view is selected by default.

- **Graph View (Default)**: The graph view shows a bar chart of the customer's energy use history on a vertical and horizontal axis. The vertical axis shows cost or energy use amounts, while the horizontal axis shows the interval of time, such as the first day of the bill period in question.
  - **Temperature Information**: A line graph is displayed to show the high and low temperature for each interval of time, and to help CSRs identify possible correlations between a customer's energy use and the weather. Weather data is based on the airport weather station closest to the customer's home.
  - **Informational Tooltip or Popup**: When a CSR hovers over a particular bill period, an informational tooltip appears. This tooltip displays detailed information about that particular period on the chart, including the read type (estimated or actual), date range, energy use amount, temperature, energy costs, bill period length in days, and (if applicable) the impact of solar power (such as a billing credit or amount of energy sent back to the grid).
  - **Estimated Reads**: If one or more bills in the data display have been estimated, the bar in the graph has a different shading, and the tooltip displays a color-coded icon. This information is hidden if the bills are not estimated. See Estimated Bill Notification for more information about what estimated bills are.
  - **Weekends Highlight**: In the month view, weekends are highlighted in the graph to make it easier to distinguish between the days of the week.
  - **Solar Information**: If a customer has solar power, the graph displays color-coded bars to show if and when a customer generated more energy than they consumed.
  - **Legend**: A color-coded legend is displayed below the module to indicate what is being shown in the data display. It includes color-coded lines for the high and low temperatures. If applicable, it includes a special shading for any reads that are estimated and another color for the impact of solar power.
- **Table View**: The table view presents a consolidated list of key billing details about the customer's energy history to help CSRs answer common questions and quickly diagnose issues. The table view includes a series of columns that provide key details about the customer's bills, including the date range, read type (estimated or actual), energy costs, total energy use amount, average daily energy use, and temperature. Customers who have solar power may see negative cost or energy use values if they sent energy back to the grid. If enough data is available from the utility, the table can also provide views of daily and sub-daily energy use trends. These more granular views allow for a deeper level of analysis that is especially useful for assisting customers who have smart meters.

**Download CSV**: This link allows users to download a CSV file of the data for further analysis in a software program of their choice, such as Microsoft Excel. The data available in the file is a replica of what is shown in the table view, and it includes temperature information.

**Virtual Bills**: A virtual bill shows a customer's daily usage data up to the present day in the Data Browser, even though the bill period is not finished yet. This is accomplished by determining the maximum number of days to display along the horizontal axis of the Data Browser in the bill view. Virtual bills are only available in bill view for customers with interval (AMI) data.

# Follow-Up Communications Module

The **Follow-up Communications** module is a tool in the Bill Advisor that allows CSRs to send an email to a customer after the end of a call. The email thanks the customer for calling and provides brief details about a utility promotion, rebate, or energy-saving tip. By affirming the customer's call and empowering them to save energy, the follow-up email is designed to improve customer satisfaction, collect more customer email addresses, and push customers to self-service.

**Email Template Selector**: The email template selector is a list of email templates for the CSR to choose from. The template that is selected by default is chosen by Oracle Utilities and the utility during program launch. The number and type of emails is configurable, and so is the subject line used in each template.

**Email Address Field**: The email address field specifies where the follow-up email should be sent. The field defaults to being blank if the customer's email address is unknown. If the email address is known (that is, if it is available in the system), then this field will be prepopulated. The email cannot be previewed or sent until a valid customer email address is added in field.

**Preview Button**: CSRs can preview what an email will look like before it is sent. When a CSR does this, a window displays showing the contents of the templated email. The preview does not include a preview of the email subject line.

**Note**: CSRs cannot make on-the-fly edits to the text of the follow-up emails due to the concern that this would add too much extra time to the service call. Moreover, no images or attachments can be included.

**Send Button**: CSRs can send the email at the click of a button. However, the button is only enabled when a valid email address is entered in the email address field. The button turns green and displays a checkmark if the send was successful.

## Follow-Up Email Features

The follow-up emails include a subject line, header, body, and footer. Beyond these generic features, there are different email templates that can be used.

### Subject Line and Header

**Subject Line**: The default subject line for each email template is: "Following up on your recent call to UtilityCo".

**Logo**: Each template email header includes a logo provided by the utility.

**Account Number**: The account number is the customer's unique account identifier and provides a useful reference. Part of the account number is obscured by default for security reasons.

## Email Body

The body includes a promotion title, static image, and other components, all of which are described below. However, the exact messaging and visual appearance will vary depending on which email template is used.

**Promotion Title**: The title includes the first name of the customer to make them feel like they are getting personal attention, and is followed by a note thanking the customer for calling. This first name is derived from the customer's account information.

**Introduction Text**: A brief statement beneath the title orients the customer to the purpose of the email.

**Button or Call to Action Link**: The button link (also known as the call to action link) beneath the image prompts the customer to carry out a task. Depending on the email template, the button link redirects the customer to an appropriate page on the utility web site, Energy Efficiency Web Portal - Classic, or Oracle Utilities NextWeb page.

## Email Footer

**Unsubscribe**: A link to a page where customers can unsubscribe from the email. An unsubscribe link must appear due to CAN-SPAM regulations in the US and similar regulations abroad.

**Utility Contact Information**: The utility's mailing address. The mailing address must appear due to CAN-SPAM regulations in the US and similar regulations abroad.

**Legal Text**: This is the copyright and any other legal text required by the utility and/or Oracle Utilities.

## Follow-Up Email Templates

There are several email templates that a CSR can select and preview before sending the email to the customer. The templates used and the appearance of the templates will vary depending on the utility's setup and configuration. Some example email templates include:

- Refrigerator Rebate Promotion
- Utility Website Promotion
- Energy Efficiency Tips Promotion
- General Rebates Promotion

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# Inside Opower

The CSI Cloud Service includes access to Inside Opower. Inside Opower is an online, utility-facing suite of tools to help users across a utility stay informed of and manage their Oracle Utilities Opower program. Utility users can access key data such as program insights, analytics, reports, contact information, and documentation. See the Oracle Utilities Opower Inside Opower Product Overview for details.

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# 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.