Oracle Utilities Opower Customer Service Interface

Opower Customer Service Interface Overview

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Oracle Utilities Opower Customer Service Interface - Program Management Product Overview

Welcome to the Oracle Utilities Opower Customer Service Interface Cloud Service Overview. Use this information to learn about the features and capabilities of the product. Have a question? Contact Your Delivery Team or visit My Oracle Support.

2
Getting Started

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. It allows Customer Service Representatives (CSRs) to find customer accounts, view customer settings, and manage customer preferences.

The CSI may include an additional tab called Bill Advisor, which contains special insights to help CSRs resolve high-bill inquiries. This feature is sold separately and is not displayed by default. See the Oracle Utilities Opower Customer Service Interface - Bill Advisor Product Overview for more information.

> **Note**
>
> The CSI is included with many of the Oracle Utilities Opower cloud services. 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.

3 Requirements and Limitations

The following requirements and limitations apply to all utilities using the Customer Service Interface.

- **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.
- **Branding Options**: No utility-specific visual branding options are available for the CSI. For example, the logo and color scheme of the product cannot be configured. However, there are basic settings that can be changed, such as the window of time before the system automatically signs out a user. To discuss such options, Contact Your Delivery Team.
- **Product-Specific Settings**: Certain product-specific settings and information may not appear in the CSI if the utility does not provide those products to a customer.
- Bill Advisor **Requirements**: For utilities using the Bill Advisor, there is an additional set of limitations and requirements. See the Oracle Utilities Opower Customer Service Interface - Bill Advisor Product Overview for more information.

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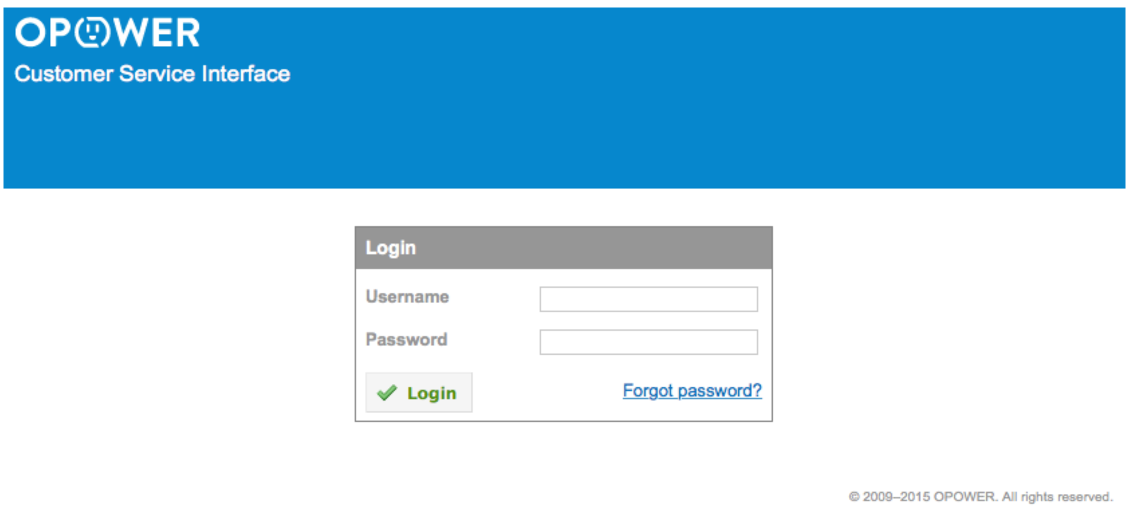
Customer Service Interface Feature Overview

The Customer Service Interface includes tools and information for supporting the Oracle Utilities Opower program. A list of the key features is described below.

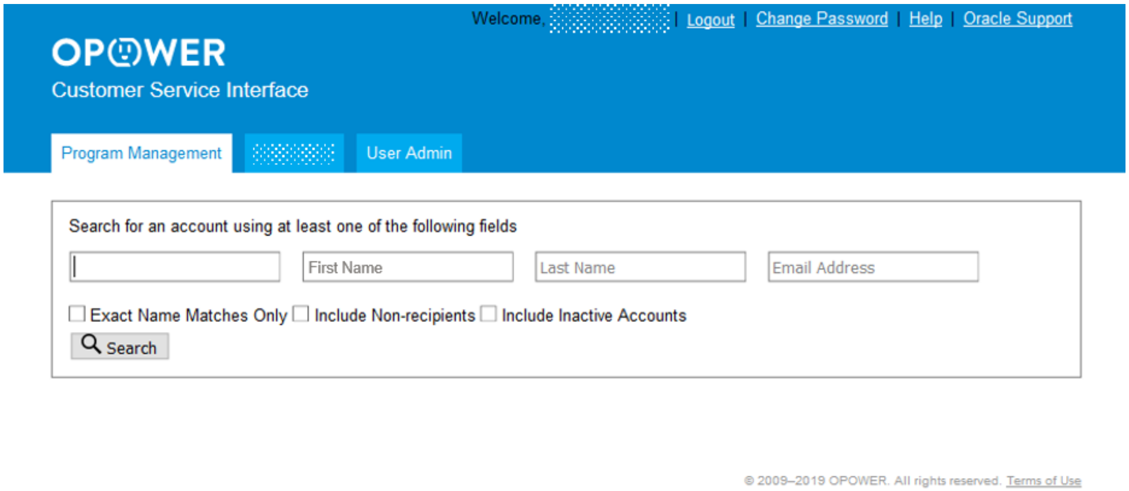
Welcome and Home Page

The Welcome page includes standard fields for authentication and password reset. The Home page includes a search engine and global links that are visible on all pages. See Welcome Page.



Program Management Tab

The Program Management tab includes features for searching customer profiles, managing customer preferences, and accessing a customer's web account to assist with troubleshooting. See Program Management Tab.



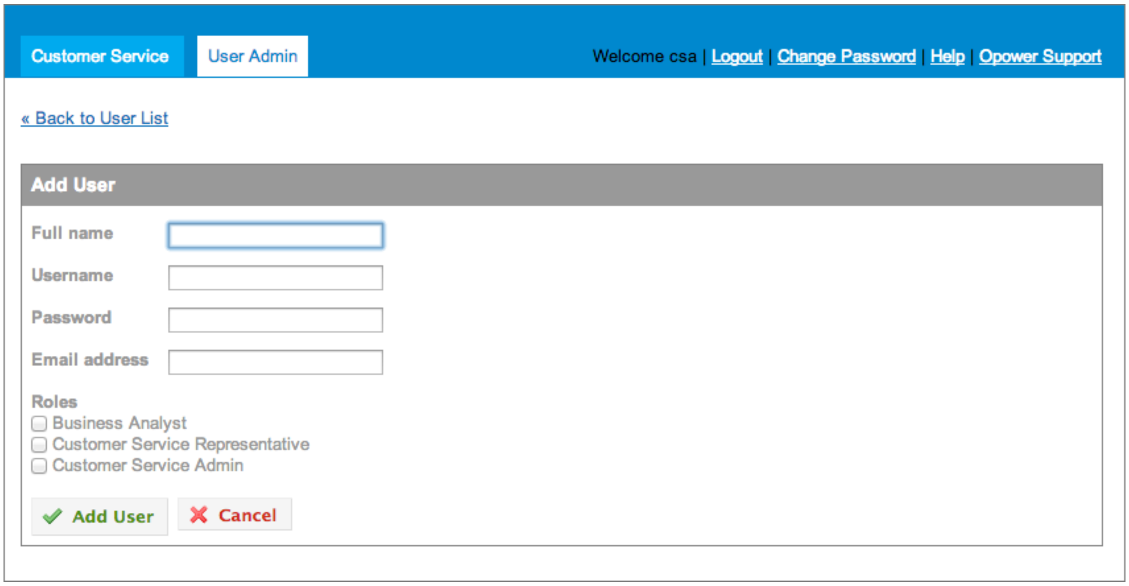
Bill Advisor Tab

The Bill Advisor tab includes features for searching for customer accounts, viewing billing insights, and offering suggestions on how to lower energy use. See the Oracle Utilities Opower Customer Service Interface - Bill Advisor Product Overview.

> **Note**
>
> Not all utilities have the Bill Advisor. If you are unsure whether your utility has this feature, ask your supervisor.

User Admin Tab

The User Admin tab includes features for adding and managing users of the Customer Service Interface. Refer to User Admin Tab for more information.



Roles and Permissions

Each user’s level of access to the CSI depends on their assigned role. A user can be assigned a single role or multiple roles.

Role	Description
Customer Service Representative (CSR)	All functionality in the **Program Management** tab
Customer Service Administrator (CSA)	All functionality in the **Program Management** and **User Admin** tabs
Bill Advisor (if applicable, sold separately from other CSI functionality)	All functionality in the Bill Advisor tab

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Authentication

There are two methods available for authenticating users who log in to the CSI: single sign-on and standalone account management.

Single Sign-On (SSO)

Implementing SSO allows users to use a single username and password to access both the CSI and any existing internal utility web systems. Oracle Utilities supports using SAML 2.0 to implement SSO with utilities. All usernames and passwords are created, maintained, and updated on the utility site. Users can access the CSI by clicking on links from the utility site that direct the user to the CSI, or by navigating directly to the CSI and being directed back to the internal utility site for account creation or authentication. See the Oracle Utilities Opower Customer Service Interface SSO Configuration Guide for details.

Standalone Account Management

Standalone account management is available to users who are not using SSO to access the CSI. A user can access the CSI by opening an Internet browser and navigating to the URL of their utility's designated CSI website. Each user accessing the tool is provided with a username and temporary password when the utility joins the Oracle Utilities Opower program.

Initial Log In: A user enters their username and temporary password to log in. The user has three attempts to log in properly before the account is locked. If an account becomes locked, a Customer Service Administrator must reset the user's password and notify the user of the temporary password.

Creating a Password: Once the correct login information is entered, users are prompted to create a personal password to replace the temporary password. The default minimum password length is eight characters. Depending on the setup and configuration of the application, three out of four of the following requirements must then be met:

- Minimum of 2 lowercase letters
- Minimum of 1 uppercase letter
- Minimum of 2 digits
- Minimum of 1 symbol

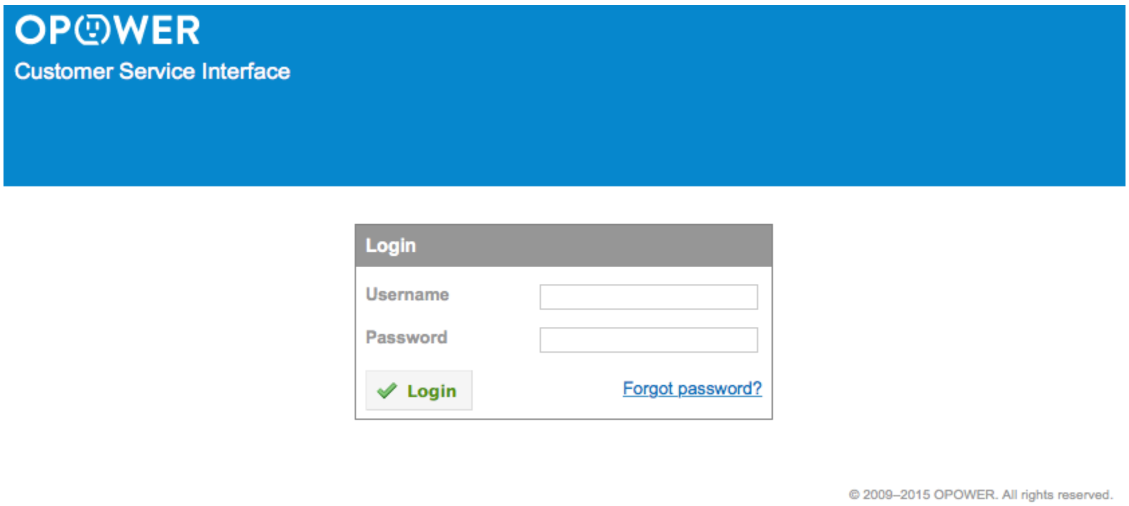
After successful password creation, users are shown the search page of the **Program Management** tab.

Changing a Password: Users who are logged in always have the option to click a link at the top of the application to change their password. Users are then required to enter their current password, a new password, and the new password again for confirmation. Users can also reset their password using the **Forgot Password?** link on their utility's designated CSI website. An email will be sent that contains instructions and a link to reset their password.

Automatic Log Out: Users are automatically logged out after 30 minutes of inactivity.

6 Welcome Page

The **Welcome** page is displayed when a CSR visits the CSI and has not signed in yet. On this page, CSRs can sign in to the CSI or reset their password if needed. If the utility is using single sign-on (SSO), the CSR will not use this page to sign in. They will use a separate page identified by their utility. See Authentication for details.



Logo and Title: The application always displays the Oracle Utilities Opower logo. This is not branded with the utility's logo.

Login: The username and password is provided during program setup and launch. If the utility is using single sign-on (SSO), then users will not see this page.

Forgot Password: This link allows CSRs to generate an email for resetting their password. There are various settings related to this feature that can be configured for each client. The default minimum password length is eight characters. Three out of four of the following requirements must then be met:

- Minimum of 2 lowercase letters
- Minimum of 1 uppercase letter
- Minimum of 2 digits
- Minimum of 1 symbol

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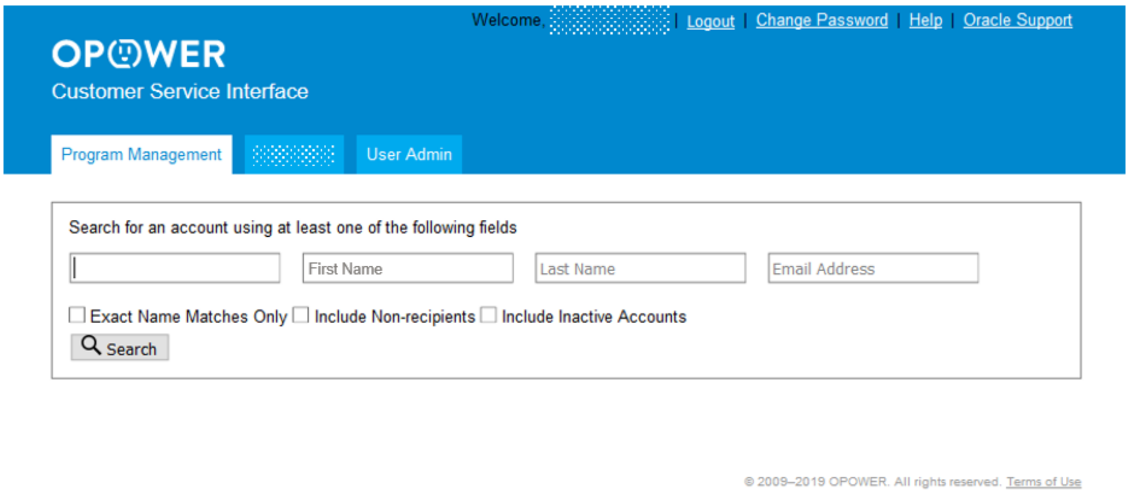
Home Page

The home page of the CSI is displayed after a user signs in successfully. It includes a search engine and global features that appear on every page of the CSI.



- **Welcome Message**: A message that identifies the user who is logged in.
- **Logout**: A link for securely signing out of the tool.
- **Change Password**: A link for changing a password.
- **Help**: A link to a searchable online help system where CSRs can access frequently-asked questions (FAQs) and procedures about the Oracle Utilities Opower program.
- **Support**: A link that redirects users to a support portal where designated utility staff can submit support cases to Oracle Utilities.

Additionally, there are several tabs displayed to allow users to perform various tasks in support of the program.

- **Program Management Tab**: A set of features that allows CSRs to search for a customer's account, view the customer's account information, and manage their account settings. This tab comes with all Oracle Utilities Opower programs. Refer to Program Management Tab for more information.
- Bill Advisor **Tab**: A set of features, insights, and information that CSRs can use to resolve high-bill inquiries and help customers lower their energy use.

> **Note**
>
> The Bill Advisor is a paid add-on that has an additional set of requirements and limitations. It is not included in the CSI by default. See the Oracle Utilities Opower Customer Service Interface - Bill Advisor Product Overview.

- **User Admin Tab**: A set of functionality used by Customer Service Administrators (CSAs) to manage user accounts, roles, and permissions. Refer to User Admin Tab for more information.

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Program Management Tab

The **Program Management** tab of the CSI is a set of features that allows Customer Service Representatives to search for a customer's account, view the customer's account information, and manage their account settings.

Customer Search

The search tool in the **Program Management** area provides search fields and filters to allow CSRs to find and open a customer's account. This information equips the user to answer questions and process requests related to this customer's account. All user roles can search for a customer account 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. **Note**: 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.

The user may have the option to exclude non-recipients and inactive accounts from the search results, or search by email address.

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.

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.

Now Viewing

The **Now Viewing** section at the top of the customer's account page shows basic information about the customer, including their utility account number(s), name, service address, and mailing address.

- **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.

Report Delivery Preferences

The **Report Delivery Preferences** section shows details about how the customer’s reports are delivered, including the report frequency and email address, if applicable. The information varies by client depending on what features the client has enabled. The list below shows all the possible fields. Other fields may appear only for information purposes.

- **Print report frequency**: The frequency at which the customer receives print reports.
- **Email report frequency**: The frequency at which the customer receives email reports. This field is only available to clients who send email reports to customers.
- **Email address**: The email address to which the customer’s Oracle Utilities Opower email communications are sent. This also includes program account creation notifications, forgotten password reminders, notifications, and so on. Only clients that are sending email communications will see this field.

> **Note**
>
> The presence of the email address in the Report Delivery Preferences section does not mean the customer has created an Opower standalone web account yet. For information on how to verify that a customer has a web portal account and to view the email address associated with it, refer to Accessing a Customer’s Web Account.

> **Note**
>
> This section does not display whether or not the customer being viewed is in the "control" group. A control group is a segment of customers that receives a *standard* user experience or communication type so that they can be compared against a different group of customers (the "study" group) that receives a non-standard user experience or communication type. Control groups and study groups are often set up for the purpose of testing the effectiveness of different kinds of user experiences or communications. If a customer is in a control group, you may not be able to configure their settings to receive certain communications, since they are reserved for the study group for testing.

Profile

The **Profile** section displays specific information about the customer's home and household. This section has two areas: **Home** and **Customer**. The **Home** area holds information about the customer's physical home, while the **Customer** area holds information about the customer's household or demographics. The fields shown in the two sections may vary from client to client depending on how applicable each field is to a particular geographical area.

The following is a list of possible fields:

Home

- **Home Size**: Depending on the utility, this displays the size of the portion of the home that is heated or cooled (for example, an unheated garage should not be included), or the number of bedrooms.
- **Spa/Sauna**: Indicates whether or not a spa or sauna exists at the home.
- **Pool**: Indicates whether or not a swimming pool exists at the home.
- **Heat Type**: The fuel type used for the home's heating system (Electric or Gas).
- **Dwelling Type**: The type of home (for example, House, Town house, Condo, Apartment, or Duplex).
- **Solar Panels (Photovoltaic)**: Indicates whether or not the home has solar panels used to generate energy.

Customer

- **Number of adults (18 or over)**: Number of people that reside in the home who are 18 or over.
- **Number of children (under 18)**: Number of people that reside in the home who are under 18.

Editing the Profile

If the customer wishes to update any information on their profile, the user can select the **Update Profile** link to edit the information in this area. With the exception of square feet, which can be updated via a text box, all other fields are updated by selecting from drop-down lists populated with the appropriate options.

Viewing the History

Users can see the trail of historical changes to the customer's profile history, including the effective date range of the historical values and the user who made the changes.

Actions

The **Actions** section includes links for performing tasks related to a customer's account, such as viewing a customer's account details or opting them out of a communication.

View Customer's Web Account

The **View Customer's Web Account** link allows CSRs to access a customer's web account in the Energy Efficiency Web Portal or Oracle Utilities Energy Management Web Portal. CSRs can then see the product interface much like the customer sees it, except they cannot modify the customer's email address or password (if applicable). The tool enables CSRs to better assist with customer questions and troubleshooting, or to opt customers out of reports.

Viewing Customer Web Account Details

The **View Customer Web Account Details** link allows CSRs to help a customer complete the account creation process.

> **Note**
>
> This link only appears if a utility provides a standalone version of the Energy Efficiency Web Portal or Oracle Utilities Energy Management Web Portal to its customers and has not enabled single sign-on (SSO). Moreover, this link only appears if a customer has registered their web account.

After a customer signs up for a web account on the Energy Efficiency Web Portal or Oracle Utilities Energy Management Web Portal, they receive an email through which they can confirm the account creation. Confirming the account creation is the final step in the web account creation process.

If the customer does not receive the confirmation email for some reason (for example, if it goes into their spam folder) or needs help confirming the account creation, CSRs can perform the confirmation step for the customer. Once the customer's web account creation has been confirmed, the customer can log into the account.

The **Customer Web Account Details** screen displays the following details about the customer's web account:

- **Account Creation Date**: The date and time when the customer signed up for a web account.
- **Username**: The username chosen by the customer for their web account.
- **Account Creation Confirmed**: Indicates whether the customer has completed the final step of confirming the account creation. If this field contains a value of **No**, there will be a **Confirm Account Creation** option next to the field. Users can select this option to perform the confirmation step on behalf of the customer.

Managing Communication Preferences

The **Manage Communication Preferences** link enables CSRs to help customers modify setting related to the Oracle Utilities Opower communications they receive from the utility.

In the CSI, you have various options to manage communication preferences for your customers. Some options may be hidden depending on which products are provided by your utility. You may also see a message explaining that no communications for a specific type of product are available for a given customer account. Moreover, in some cases, you may be able to manage properties for products the customer is ineligible to receive.

Communication and Alert Recipients

The **Communication and Alert Recipients** section allows users to view and modify the recipients associated with a customer account. The section will display information for the primary account at a minimum. Recipients are contacts who can be selected to receive communications and alerts related to the account.

- **Recipient Details:** The contact details for each recipient are provided. Any recipient other than the primary recipient can be removed. The name, email address, SMS (text) number, and voice message number can modified for each recipient. Additionally, each recipient must have a name and at least one communication type. The communication type determines which communications and alerts a recipient has the option to receive.
- **Create New Recipient:** Customers can specify other recipients to receive communications. If a product allows additional recipients to be added, customers can add up to 10 additional recipients.

> **Note**
>
> When contact information is added or updated, basic validation is used to ensure that the phone number and email address resemble real values. However, these values are not automatically tested or verified, so it is possible to enter incorrect or inaccurate information, even if it looks correct.

Communication and Alerts

The **Communications and Alerts** section provides a list of the communications that recipients for the utility account can receive.

Additional recipients can be added for some communications. When a CSR selects the option to add a recipient, a drop-down list displays and allows them to select from recipients that have been created in the utility account profile. Applicable channels can then be selected or cleared for each recipient. If all applicable recipients are added, then the option to add more recipients is hidden.

> **Note**
>
> If a recipient is added for a communication that they are not eligible to receive, then the recipient will not receive it. However, the communication will remain selected in the settings. The eligibility requirements for each communication vary by utility. If you need eligibility details, ask your supervisor or contact My Oracle Support.

Home Energy Reports **Section**

Mail: This option controls whether the customer receives a printed Home Energy Report. This option will only display if the customer is already a recipient of print Home Energy Reports. This is because Home Energy Reports are an opt-out program only. Recipients can not be added for Home Energy Reports because they are only sent to the primary mailing address for the utility account.

Email: The email option controls whether the customer receives an Email Home Energy Report. This option can be displayed whether or not the customer is already receiving Email Home Energy Reports. Additional recipients can be added.

Weekly Energy Updates **Section**

This section controls whether a customer receives Weekly Energy Updates. Weekly Energy Updates are only available for the email channel.

High Bill Alerts AMI **Section**

This section controls whether a customer receives a High Bill Alerts AMI. The available channels include email and SMS.

Peak Time Rebates **Section**

This section controls whether a customer receives Peak Time Rebates. The available channels include email, SMS, and voice.

Widget Gallery

The **Widget Gallery** link enables CSRs to view all embedded Digital Self Service - Energy Management widgets associated with a customer. The CSR can then see the widget as the customer sees it and answer customer questions more effectively.

> **Note**
>
> The widget gallery is only available for utilities that have embedded widgets as part of the Digital Self Service - Energy Management Cloud Service. For more information about this cloud service, see the Oracle Utilities Opower Digital Self Service - Energy Management Cloud Service Product Overview.

- **Navigation**: The widget gallery includes a navigation menu with links to all the available widgets.
- **Widgets**: Widget organization and selection is dependent upon your setup and configuration, CSRs can refer to the User Guide for more information.
  The gallery displays the version of the widget that is being used for the customer, and the content of each widget matches what the customer sees. A CSR can interact with a widget in the same way a customer can. For example, a CSR can select links and menus, or perform tip actions if applicable. If a CSR and a customer are using a widget at the same time, any changes made are preserved for the last person who made the changes.

Print Reports Section

The **Print Home Energy Reports** section contains a list of all printed Home Energy Reports that have been generated for and mailed to a customer, with the most recent report listed at the top. Reports are named by the time period covered in the report. Users can select the report name to view the report.

Email Reports Section

For utilities that send email Home Energy Reports to customers, an **Email Home Energy Reports** section is displayed. This area lists all the email reports that have been generated and sent to a customer, with the most recent report at the top. A message indicates if no email reports have been generated. Email reports are named by the time periods they cover. A user can select the email report name to open it.

Peak Day Communications Section

For utilities who send customers peak day communications (either for Behavioral Demand Response messages or Peak Time Rebates), a **Peak Day Communications** section is displayed. This area lists all communications that have been generated for and sent to a customer, with the most recent one at the top. A message indicates if no communications have been generated for the customer. A user can select the communication to view it.

Customer Education Reports Section

For utilities that send Customer Education Reports, a **Customer Education Reports** section is displayed. This area lists all communications that have been generated for and sent to a customer, with the most recent one at the top. A message indicates if no communications have been generated for the customer. A user can select the communication to view it.

Customer Alerts Section

For utilities who send customers High Bill Alerts AMI or Weekly Energy Updates, a **Customer Alerts** section is displayed. This area lists all communications that have been generated for and sent to a customer, with the most recent one at the top. A message indicates if no communications have been generated for the customer. A user can select the communication to view it.

Customer Usage Notifications Section

For utilities who send customers High Bill Alerts (non-AMI), a **Customer Usage Communications** section is displayed. This area lists all communications that have been generated for and sent to a customer, with the most recent one at the top. A message indicates if no communications have been generated for the customer. A user can select the communication to view it.

Load Shifting Section

For utilities who send customers Load Shifting emails, a **Load Shifting Communications** section is displayed. This area lists all load shifting communications that have been generated for and sent to a customer, with the most recent one at the top. A user can select the communication to view it.

> **Note**
>
> The Load Shifting product was previously called Behavioral Load Shaping (BLS), and might still appear in the interface as such.

9 User Admin Tab

The **User Admin** tab of the CSI is a set of functionality used by Customer Service Administrators (CSAs) to manage user accounts, roles, and permissions. From this section, CSAs can add new users and edit existing ones.

User Management: The **User Management** section includes a menu that allows CSAs to filter the list of users based on "Active", "Inactive", and "All users" statuses. This makes it easier to distinguish between the active and inactive CSRs on their rosters.

User List: The user list displays the name, username, email, and roles of the users who have access to the CSI. It also shows an **Actions** column that allows the user to edit a specific user's profile. This includes resetting a user's password.

Add a User: A button at the bottom of the page allows CSAs to create a new user profile. Upon clicking the button, they see an **Add User** page and can fill in the user's name, contact information, and permissions.

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Contact Your Delivery Team

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

To contact your Delivery Team:

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

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