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Getting Started

The Digital Self Service - Transactions web portal is a flexible web experience that allows utilities to provide their customers with a one-stop portal to manage their utility account, pay their bill, and start, stop, or transfer service. The web experience is delivered through a modular, mobile responsive design that allows customers to perform self-service transactions on a desktop or mobile device.

Customer Service Representatives (CSRs) can answer frequently asked questions, help customers access the web portal, and give customers guidance on how they can be self-sufficient when it comes to managing their service with the utility.

**Note:** Some of the features described may not be applicable or available to your utility. Contact your supervisor if you have any questions.

Frequently Asked Questions (FAQs)

This section provides a list of questions and answers to some of the most common inquiries that customers have about Digital Self Service - Transactions.

General FAQs

**Can I use my device of choice (phone, tablet, laptop, and so on) to access my account?**
Yes. The Web Portal uses a responsive design which automatically resizes the content to account for a broad range of devices and screen sizes.

**How can I reset my password?**

**Note to CSRs:** Authentication is controlled by an identity provider that is integrated with Digital Self Service - Transactions. Identity providers may handle password reset differently and the directions below are based on common scenarios. Contact your supervisor to determine how password management is handled by your system.

If a customer has forgotten their password, they can use the **Forgot Password** link from the sign in page. They must provide the username or email address associated with their web account to generate an email notification. The email will contain a link to reset the password.
Neighbor FAQs

Note: Depending on each utility's setup and configuration, customers may see "similar homes" terminology in the user interface instead of "neighbor comparison" terminology. Utilities can choose to use one type of terminology or the other based on how they think their customers will react to Oracle Utilities Opower products.

Why are you comparing me to my neighbors?

We are joining other utilities and cities across the country to provide this information because it has been proven to effectively help customers save energy and money. We compare your energy use to the use of similar size homes that are close to yours and use the same heating fuel. We do this to provide you with education and context, and to offer an idea of what you could realistically save.

How did you select my neighbors?

Our goal is to provide you with a comparison that is valid and meaningful. We compare your household to other real households in your area, not a theoretical home with similar characteristics.

To provide valid comparisons, we've chosen specific homes with characteristics that typically lead to similar energy needs, such as home size, heating source, and dwelling type. Most importantly, we only include homes that appear to be occupied at the time of the neighbor comparison.

Why are you trying to make me feel bad?

We are not trying to shame or judge you. If we have offended you, it was not our intent. Rather, we hope that the information we provide can offer valuable insights and context about your home's energy use so that you can save energy and money. We have joined other cities and utilities across the country to provide these reports because they have been proven to help households effectively save.
I have special circumstances. Why don’t you take these into account?

We do take some special circumstances into account based on information in your home profile. For example, we can account for what type of heating you use. But there are a few reasons why we can’t take all special household characteristics into account for the neighbor comparison.

We can only compare your usage based on what we know about you and your neighbors. We base your comparison on reliable data that is gathered for households in your area. However, a variety of lifestyle choices and household changes don’t have a system of record. For example, we don’t have a way of knowing if you have guests visiting, work from home regularly, or just bought new windows. For this reason, we base your comparison on the major, known factors that drive energy consumption.

Some attributes are not a good basis for comparison. For example, you might wonder why we don’t compare your home to only homes of a similar age. Similarly aged homes don’t necessarily have similar energy needs. Older homes may typically be less efficient, but they are also more likely to have been renovated. New homes may be more efficient in some ways, but they may have more features that use energy (jetted spas, heated floors, central AC, and other similar types of features).

We want the comparison to be meaningful. We hope that the neighbor comparison can offer valuable information and context about your home’s energy use so that you can save energy and money.

Even without taking into account everything that’s special about your circumstances, the program can still be a useful informational tool and allow for measurement of your own performance over time.

How do you know the comparisons are valid?

Our comparisons include 100 similar, nearby, occupied homes. Our research shows that for almost all residents, this 100-home average indicates typical usage.

How can I improve the accuracy of my neighbor comparison?

There are a few ways you can improve the accuracy of your neighbor comparison. You can take a Home Energy Analysis to tell us more about your home, or you can go to your account settings to update your household information. Any changes you make may impact the tips you see and/or how you compare to your neighbors. I can also help you update your profile.
Note to CSRs: Depending on your utility’s setup and configuration, your customers may not have access to the Home Energy Analysis feature or their home profile settings. Contact your supervisor if you have any questions.

Are you comparing me to customers at other utilities?

No, you are only compared to other customers in your utility.

What is the difference between neighbors and similar homes?

Note: This FAQ is meant to give CSRs background information on a product feature that varies by program.

Depending on each utility’s setup and configuration, customers may see "similar homes" terminology in the user interface instead of "neighbor comparison" terminology. Utilities can choose to use one type of terminology or the other based on how they think their customers will react to Oracle Utilities Opower products.

The table below gives a few examples of how and where such differences in terminology may appear. The variation is most likely to appear in features that compare a customer’s energy use against that of other customers.

<table>
<thead>
<tr>
<th>Product or Feature</th>
<th>Terminology</th>
</tr>
</thead>
</table>
| Neighbor comparison in print or email Home Energy Reports | Neighbor comparison: "8% less electricity than efficient neighbors."

Similar homes: "8% less electricity than efficient similar homes."

| Neighbor comparison in the Oracle Utilities Opower web portal. | Neighbor comparison: "Who are my neighbors?"

Similar homes: "What homes are compared?"

These variations are not extensive and only appear in a few places. If you are not sure which variation is used by your utility, check with your supervisor.
Privacy FAQs

Are you sharing my energy use information with my neighbors?

No, your identity is kept completely anonymous. In the case of the neighbor comparison, we use an average of 100 similar homes in your area, but only you can see your own energy use. Many of our customers are finding that this context is very helpful in making decisions about their energy use, and we hope you will find the comparison valuable as well.

Do you use parcel data, and if so, where do you get it?

Yes, we do try to use parcel data (data about a property, such as the size, heating type, and so on) only if it is available, since it helps with the neighbor comparison process.

**Note to CSRs:** For example, US locales get parcel data from public data sources such as tax assessor or county records. The nature of parcel data and how it is obtained in your country may differ. Have your supervisor contact Oracle Utilities to find out whether parcel data is being used in the product for your customers and how the parcel data is obtained.

What do you use parcel data for?

Parcel data often includes information about a household size, type of heating system, type of cooling system, and so on. We can use this information to identify other households that are similar to yours.

**Note to CSRs:** If you support customers in a non-US locale, the nature of parcel data may be different than in the US. Have your supervisor contact Oracle Utilities to find out whether parcel data is being used in the product for your customers and what type of information the parcel data contains.

Do you report data about me back to the parcel data source?

No, we do not report any information we collect about you to the source of the parcel data.
Feature-Specific FAQs

The Digital Self Service - Transactions features come with their own sets of frequently-asked questions.

- See "Billing and Payment FAQs" on page 49.
- See "Start, Stop, and Transfer Service FAQs" on page 51.
- See "Manage Web Account FAQs" on page 53.
- See "Alerts and Notifications FAQs" on page 57.
- See "Billing Communications FAQs" on page 58.
- See "Help Center FAQs" on page 62.

Customer Experience

Digital Self Service - Transactions is an authenticated digital customer experience that increases customer satisfaction and reduces cost to serve. Customers can complete transactional self-service functions such as viewing and paying their bills, signing up for utility programs, and starting and stopping service. The responsive design allows customers to complete all transactions on any device or screen size and orientation.

Digital Self Service - Transactions offers a digital customer experience through the following features.

**Note:** Digital Self Service - Energy Management features can be included as an add on to the Digital Self Service - Transactions web portal. For customer support capabilities related to Digital Self Service - Energy Management features, see Supporting Digital Self Service - Energy Management.

Overview Dashboard

The Overview dashboard introduces customers to information about their account and energy use. It includes the following major components.
Alerts

Any critical, active alerts for a customer are displayed near the top of the screen with an applicable alert message. Only high severity alerts are displayed in this location. All other alerts are available as part of the Notification Center. For more information on these alerts, see "Notifications" on page 24.

Account Selector

Customers can use the Current account drop-down list to select the utility account they want to view. All utility accounts connected to a web login are available for selection, and an account search is displayed for customers with five or more accounts. Additionally, the account selector is available on all applicable areas of the Digital Self Service - Transactions web portal such as Billing and Payment and Alerts and Notifications. Customers can also select the Manage Accounts option from the drop-down list to modify their connected accounts. For more information on options customers have for managing their accounts, see "Manage Web Account" on page 21.

Bill Information and Announcements

Details about a customer’s most recent bill and summary information about their account are presented as an initial insight into the customer's account. Customers can also quickly
navigate to bill actions such as paying their current bill or enrolling in billing programs such as autopay.

**Outstanding balance.**
The amount of $903.01 is outstanding on your account.

Announcements provide important information to the customer such as an outstanding balance notice, program enrollment status (see "Manage Billing" on page 15), open service tickets, or pending start or stop service requests.

Available announcements can include:

- **Active Pay Arrangement**
- **Enrolled in Budget Billing**: The total budget billing payment for each billing period and the frequency of the account reconciliation is displayed.
- **Open Service Task**
- **Pending Start or Stop Request**
- **Outstanding Balance**: All new charges from the current bill period are excluded from the outstanding balance. If the customer has a prepaid account, the outstanding balance is not displayed. If the account does not have an active payment arrangement service agreement in a pending or active status, and it is not disqualified for payment arrangements, a link is displayed to sign-up for payment arrangements.
- **Prepay Biller Information**: For accounts with an active Prepay Biller, the prepaid balance is shown when the value is below a certain configurable threshold.

**Usage and Bill Trends**

Graphs display insight into a customer’s use and costs trends for their available service types. Insights for each applicable service type allow the customer to compare the current bill to the bill from the same time last year.
If a utility purchases Oracle Utilities Opower Digital Self Service - Energy Management Cloud Service, links to Digital Self Service - Energy Management tools are provided for customers to review additional details about energy cost or use trends.

Recommended Tips

Links to cost-saving tips are displayed, which instruct customers on how they can use less energy, water, or wastewater, and save money. See the Oracle Utilities Opower Digital Self Service - Energy Management Cloud Service Product Overview for more information on the Ways to Save features.
Next Best Action

Promotion of programs and services to customers are available through Next Best Action, which is a Digital Self Service - Energy Management Cloud Service add on. Next Best Action provides dynamic and actionable web banners that can be shared with all customers or targeted to specific customer groups. The web banners guide customers to the most valuable opportunities or solutions available and helpful tools to help them manage energy use and costs. See the Oracle Utilities Opower Digital Self Service - Energy Management Cloud Service Product Overview for more information on the Next Best Action features.

Billing and Payment

Digital Self Service - Transactions includes billing and payment features such as viewing and paying a bill, reviewing payment history, and selecting billing and payment options such as paperless billing. Links are available to customers to take common billing actions such as viewing more details about their current bill, comparing previous bills, exploring their energy use, and changing their utility account communication preferences.

View Bill

Customers can view their current bill at a glance to review their new charges, bill due date, previous balance, and any applicable payments or adjustments. An option is available to make a one-time payment on the current bill. Customers that select this option are prompted to select the payment amount, date, and payment method. The total balance due is provided as the default payment amount. Customers can also be provided an option to make a charitable donation before submitting their payment. If a customer manages multiple accounts, they have the option to pay multiple accounts in a single payment transaction.

Note: If customers are enrolled in automatic charitable contributions for a given charitable organization as described in "Charity Contributions" on page 18, the customer is shown their automatic charitable payment amount when making a one-time payment. The customer cannot apply further contributions to that charity as part of the one-time payment.

The option to download a PDF copy of the current bill is available if the utility completes the integration to support bill downloads.
A comprehensive listing of current bill details is available with the Breakdown of new charges. Customers can review their current bill charges broken down by premises, service type, and service point. Factors that can influence use and costs such as bill length, rate tariffs, tier breakdowns, and taxes are also highlighted.
Billing and Payment History

Customer can select to view Billing and Payment History, which provides a record of posted bills and payments scheduled by the customer. Posted bills include a summary of the previous balance and new charges, as well as a link to view the applicable bill. The most recent transactions are displayed first, along with the option to view additional transactions. All payment transactions include a confirmation number, the last four digits of the applicable payment method, and the tender type that provides additional details on how the payment was processed.
**Note**: Transactions such as bill cancellations and rebills are grouped into the current bill and are included as an adjustments line item.

Future, scheduled payments are also displayed, including a breakdown of charges which may include multiple account transactions or charitable contributions. Customers can also cancel any scheduled payments.

Customers can select to download all financial history as a comma separated value (CSV) file.
Projected Bill

The projected bill shows customers their current usage or cost so far in the billing period, their projected usage or cost for the billing period, and how that compares to their typical usage or cost for the period, based on their past usage.
Compare Bills

Customers can compare the costs of their current bill to previous bills. The Bill Comparison allows customers to compare their current bill to their previous bill and to the corresponding bill from the same time period the previous year. If data from the previous year is not available, only an analysis against the previous bill period is available. A bill period from the previous year is defined as the bill period that overlaps the most with the current bill period. Customers can also use the This Bill drop-down list to select a historical bill to review the applicable previous bill comparison.

Manage Billing

Customers can enroll in the following programs, configured by the utility to manage the payment of their utility bills. All programs, except for paperless billing and charitable contributions, include a list of FAQs to explain the programs and provide more details on how they affect a customer’s account.

Note: If a utility chooses not to offer a program to customers or a customer is ineligible for a program, the program is hidden from the Manage Billing list.
**Paperless Billing**

Paperless billing provides the same information as paper bills, delivered through email. Links to important customer actions such as viewing or paying a bill are included.

Customers can enroll in paperless billing at any time using their desired email address. They can also edit their email address or unenroll at any time.

![Paperless Billing](image)

**Automatic Payments**

Automatic payments allow customers to automatically pay their bills using their preferred payment method. Customers who enroll in automatic payments must provide their checking account or credit card information, along with a recurring date for the automatic payments. Enrolled customers can unenroll at any time. If automatic payments are processed by a third-party provider, customers are redirected to the third-party credit card processor to complete the unenrollment.

![Automatic Payments](image)
**Budget Billing**

Customers interested in fixed payments, also referred to as budget billing, can review details about the utility’s fixed payment plan. This includes information on how the plan works, how much it costs per bill, advantages of signing up for the program, and a list of frequently asked questions. Interested customers can easily enroll in the program, and enrolled customers are provided the option to unenroll from the program.

![Budget Billing](image)

**Payment Arrangement**

Utilities can offer payment arrangement plans to customers with unpaid balances. Customers can review details about the utility’s payment arrangement plan, including information on how the plan works, their current unpaid balance, and a list of frequently asked questions. Interested customers can enroll in the program and select from available payment options. The payment options break the unpaid balance down into equal payments over a specified number of bills.

Enrolled customers can monitor their remaining balance from the payment arrangement page. They can review the start date of their plan, the initial amount, and the monthly amount due to keep track of their progress on paying off their balance.
Note to CSRs: After a customer is enrolled, they cannot unenroll online. If configured, customers can use the contact us form to request unenrollment, which creates a task in Oracle Utilities Customer Care and Billing for a customer service representative to contact the customer and guide them through the process.

Charity Contributions
Utilities can offer charitable contribution plans that allow customers to make donations to available charitable organizations every billing period. When a customer enrolls in charitable contributions, they are presented with charitable organizations that the utility has configured. Each organization is a separate enrollment, and during enrollment customers can select their contribution amount to apply during each billing cycle. Customers can unenroll in a charitable payment or modify their contribution amount at any time.

Start, Stop, and Transfer Service
Self-service options are available to the customer to start, stop, or transfer utility service. These options quickly walk the customer through the process and requirements to complete their service transaction.
Start, stop or transfer service

Requesting service changes online is fast and easy
Get started by selecting one of the options

1. Transfer service
   Move your service from one location to another.

2. Stop service
   Moving out of our territory? Stop your service with us.

3. Add service
   Add additional service location to your current account.

GET STARTED

Start Service

Existing and new customers can start a new service using a process that provides clear instructions and requirements. Customers can start a new service by using the general work-flow described below:

1. **Access Site**: Customers access the start service process through the utility website. Customers that do not have an account are not required to log in to complete the start service request. Existing customers that are adding additional service for their account must log in to their account prior to starting an add service request.

2. **New Service Details**: Customers provide the following information to start or add service:
   - **Service Address**: The full street address for the new service.
   - **Start Date**: The date to begin service. A date selector allows customers to browse to the applicable day. Information on the service start process and requirements are also included.
   - **Address Details**: Additional information about the address, which can include the type of home, number of occupants, and whether they rent or own the home. Applicable details are determined by the utility.
   - **Identity Verification**: Personal information from the user is required to verify their identity before they can proceed. Identity verification parameters are configured using Oracle Utilities Customer Care and Billing. For more information on defining identity verification parameters, see the Oracle Utilities Opower Digital Self Service - Transactions Configuration Guide.

3. **Contact Information**: A customer's phone number and mailing address are required. The service address acts as the default mailing address.
4. **Review and Confirm**: All information provided by the customer is displayed for review. Customers can choose to edit any information that is incorrect.

For new customers, a new account and service are created. For existing customers, new service is created as part of the customer’s existing account. In both scenarios, the customer must connect to their account using the Account and Preferences options (see "Manage Web Account" on page 21).

**Stop Service**

Customers can stop all services for a given account by using the general work-flow described below:

1. **Access Site**: Customers access the stop service process through the utility website and must log in to their account.

2. **Stop Service Details**: Customers provide the following information to stop service:
   - **Service Address**: The street address for the service that is to be stopped.
   - **Stop Date**: The date to stop service. A date selector allows customers to browse to the applicable day. Information on the service stop process and requirements are also included.

3. **Contact Information**: A customer's phone number and mailing address are required.

4. **Review and Confirm**: All information provided by the customer is displayed for review. Customers can choose to edit any information that is incorrect.

**Transfer Service**

Customers can quickly move service from one premise to another using the general work-flow described below:

1. **Access Site**: Customers access the transfer service process through the utility website and must log in to their account.

2. **New Service Details**: Customers provide the following information to start new service as part of the transfer:
   - **Service Address**: The full street address for the new service.
   - **Start Date**: The date to begin service at the new address. A date selector allows customers to browse to the applicable day. Information on the service start process and requirements are also included.
   - **Address Details**: Additional information about the address, which can include the type of home, number of occupants, and whether they rent or own the home. Applicable details are determined by the utility.
3. **Stop Service Details**: Customers provide the following information to stop service as part of the transfer.
   - **Stop Service Address**: The street address for the service that is to be stopped as part of the transfer of service.
   - **Stop Date**: The date to stop service. A date selector allows customers to browse to the applicable day. Information on the service stop process and requirements are also included.

4. **Contact Information**: A customer’s phone number and mailing address are required. The service address acts as the default mailing address.

5. **Review and Confirm**: All information provided by the customer is displayed for review. Customers can choose to edit any information that is incorrect.

**Manage Web Account**

Customers can view their web account information and connected accounts. Customers can also add utility accounts they want to manage online, remove accounts, or invite guests to their accounts if they have permission to invite guests. Changes to the web login details and account details are applied to all accounts linked to that login. Users cannot maintain separate web login details for different accounts under the same login.

**Note**: Digital Self Service - Transactions provides a view of a customer’s web account information. The utility must provide and support the work-flows through configuration of an identity management system for customers to update their web account information.
Web Login Details

Customers can view their login username or email address and edit their password:

- If authentication is configured using Oracle Identity Cloud Service, customers can select the Edit password option to change their password directly within Digital Self Service - Transactions.
If authentication is configured using a third-party identity provider, an **Edit email and password** option is provided, which redirects the customer to an external site to change their credentials as required by the third-party identity provider.

**Account Details**

Customers can view the name associated with their web account. Selecting the **Edit** link provides the customer with information on how they can request an update to the name on their account.

**Connected Accounts**

Customers might have multiple utility accounts linked to their web login for Digital Self Service - Transactions. Each utility account has a nickname, account ID, and address. A **Premises** expand displays additional addresses for utility accounts with multiple addresses.

Customers can connect new accounts to their web login. This is a common task when starting a new utility service (see "Start, Stop, and Transfer Service" on page 18). By default, only the main customer can be linked to the utility account online. To give other web users access to the utility account, the main customer must invite guests to connect to the account. The following information is required when connecting an account:

- **Account Number**: The account ID for the utility account.
- **Customer Identification**: The identifying information for a customer, as defined by the utility, such as a social security number, driver's license, or phone number.
- **Account Nickname**: A descriptive name for the account such as "Home."

After an account is created and linked to the web login, only the account name can be changed for an account. A user can unlink an account from their web login at any time.

**Guest Users**

For any connected account a customer can **Add guest users**. Guest users can access the utility account with a level of access lower than what is provided to the primary account holder. When selecting this option, the customer is prompted to provide the guest user’s first name, last name, and email address. The email address provided is used to send the user an invitation email to accept the guest user access. The customer adding a guest user must also define the level of access to grant to the guest user. Utilities must provide the roles that are available for assignment to guest users and the access that each role is granted. For more information, see the [Oracle Utilities Opower Digital Self Service - Transactions Configuration Guide](#).

The main account holder can expand **Guest Users** to view the list of guest users included on a utility account. Full guest user management is available including the options to review
what actions the guest user can take given their access level, change the guest user’s access level, remove the guest user, and revoke a pending guest user invitation. The list of guest users is not available if there are no guest users or pending guest user invitations for an account.

Guest user invitations do not expire. If the guest has an existing web login with the utility, an invitation notification is displayed upon logging in to their account. If the guest does not have an existing web login with the utility, they are prompted to create a web login when attempting to accept the invitation from the invitation email. When a guest accepts an invitation to a utility account, the account holder receives a confirmation email. Customers can revoke a pending invitation or remove a guest user at any time.

Customers can review the list of utility accounts that they have been granted guest access to by reviewing the list of Accounts you are a guest on. Each guest account link describes the role for their guest access and the types of actions that the role allows them to perform for the utility account. A customer can choose to unlink their account to no longer have guest access to the account. This list is not displayed if the customer is not a guest on any other accounts.

Notifications

Customers can review and modify their notifications, alerts, and communications for their account, as well as define the contact methods for each applicable communication. Digital Self Service - Transactions supports a wide variety of notifications that can be viewed by a customer when they sign in to their account or sent to contacts that the customer creates.

Note: Customers can select their account using the Current account drop-down list. For more information, see “Account Selector” on page 7.

Alerts and Notifications

Customers are presented with important alerts and notifications about their account in the Overview Dashboard and the Notification Center. Critical information, referred to as alerts, are displayed directly on the Overview Dashboard, and customers can scroll through all critical alerts. The Overview Dashboard also displays a single item for non-critical notifications. Customers with more than one non-critical notification see a summary of notifications on the Overview Dashboard with the total number of non-critical notifications, along with a link to the Notification Center to view all alerts and notifications.

All active alerts and notifications are available to customers in the Notification Center. Alerts and notifications cover areas such as payments, billing information, account status updates,
and guest user invitations. A message is displayed for customers that have no active alerts or notifications.

![UtilityCo](image)

**Payment Status Alerts and Notifications**

Customers receive alerts and notifications for status updates to recent payments, including:

- Payment received
- Payment scheduled
- Payment failed
- Payment rejected
- Scheduled payment canceled
- Payment submitted
- Automatic payment received
- Automatic payment failed
- Automatic payment rejected
- Automatic payment submitted

**Bill Due Alerts and Notifications**

Customers receive alerts and notifications for their bills, including:

- Bill past due
- Bill due in future
- Bill due today
Account Status Alerts
Customers receive alerts for critical account status updates, commonly as a result of unpaid bills, including:

- Service will be suspended
- Service suspended
- Service restored

Guest User Invitations
Customers receive notifications when there is a pending guest user invitation waiting for the guest user to accept.

Billing Communications
The members of a utility account with the required permissions can set their billing communication and alert preferences, including:

- "Contact Methods" on page 28
- "Bill Delivery" on page 28
- "Billing and Payment Alerts" on page 28

Note: All modifications are made for the utility account and not the web login. Customers can have different settings for each of their accounts by selecting the account they want to modify from the account drop down list.
Set your billing communications preferences

**Contact methods**

<table>
<thead>
<tr>
<th>PHONE</th>
<th>(650) 255-1234</th>
<th>Details ▲</th>
</tr>
</thead>
<tbody>
<tr>
<td>PHONE</td>
<td>(415) 252-4706</td>
<td>CELLPHONE Primary EDIT</td>
</tr>
<tr>
<td>EMAIL</td>
<td><a href="mailto:3037467336@txt.att.net">3037467336@txt.att.net</a></td>
<td>PRIMARYEMAIL Primary EDIT</td>
</tr>
<tr>
<td>EMAIL</td>
<td><a href="mailto:walter@workemail.com">walter@workemail.com</a></td>
<td>SECONDARYEMAIL REMOVE EDIT</td>
</tr>
</tbody>
</table>

*Add contact method*

**Bill Delivery**

<table>
<thead>
<tr>
<th>MAIL</th>
<th>500 Guerrero St San Francisco San Francisco CA 94103</th>
<th>Details ▲</th>
</tr>
</thead>
</table>

*Enroll in Paperless Billing*

**Billing and payment alerts**

- **Programs and Offers**
  - Send to 3037467336@txt.att.net remove
  - Send to (415) 252-4706 remove

- **Bill Due**
  - DAYS BEFORE
  - 4
  - Send to 3037467336@txt.att.net remove
  - Add another contact method

- **Bill Ready**

- **High Consumption Alert**

- **Late Payment**

- **Payment Received**

*Save CANCEL*
Contact Methods
Contact methods provide delivery methods for billing and payment alerts. A minimum of one primary contact method is required for each contact type that a customer has included for their account. For example, if a customer includes phone number contacts for their utility account, one phone number must be defined as the primary phone contact. The primary contact methods cannot be deleted but can be modified.

Customers can add or delete contact methods from the contact list at any time. When deleting a contact method, any communications assigned to a specific contact are also removed. If the deleted contact method was the only contact method set to receive the utility bill through email, the bill is automatically sent to the primary email for the account.

Bill Delivery
Customers can choose to receive their bill through standard mail or through email. Selecting email delivery automatically enrolls the customer in paperless billing. Standard mail delivery customers can change their delivery address.

Billing and Payment Alerts
Billing and payment alerts, as defined by the utility, can alert customers to important billing and payment information. These notifications, which are sent directly to the contacts the customer selects for a billing or payment alert, can complement the "Alerts and Notifications" on page 24 that are displayed in the Notification Center. Common alert notifications can include:

- Bill is ready
- Bill is due
- Programs and offers
- Bill is past due
- Payment received

Energy Use Communications
The account manager for a utility account can set their energy use communications and alerts using the following options:

Note: Energy use communications are part of the Digital Self Service - Energy Management features are an optional add-on, available through the Oracle Utilities
Opower Digital Self Service - Energy Management Cloud Service. CSRs can make changes for customers directly through the Digital Self Service - Transactions portal by masquerading as the customer. For additional information on supporting the Digital Self Service - Energy Management feature functionality and requirements see the Oracle Utilities Opower Customer Service Documentation.

- "Energy Use Communication Recipients" on page 30
- "Home Energy Reports" on page 31
- "Weekly Energy Updates" on page 31
- "High Usage Alerts" on page 31
- "Peak Pricing Alerts" on page 32

**Note**: All modifications are made at the utility account and not the web login. Customers can have different settings for each of their accounts by selecting the account they want to modify from the account drop down list.
Energy Use Communications

Energy use communications can be sent to any recipient. Customers must provide an email address and phone number for each recipient. Recipients can then be selected for each energy use communication type described below.

**Note:** Recipients are different than the contact methods used for billing communications. If the same contact information should be used for both billing and energy use communications, an applicable contact method and recipient must both be created.
Home Energy Reports
Home Energy Reports are user-friendly communications that provide personalized information to customers about their energy use. Customers can choose to receive HERs through standard mail or email. Home Energy Reports sent through standard mail can only be sent to the primary mailing address for the utility account. For more information on Home Energy Reports, see the Oracle Utilities Opower Energy Efficiency Cloud Service Product Overview.

Weekly Energy Updates
Weekly Energy Updates are email notifications that compare the energy use for a premise to that of similar neighbors. For more information on Weekly Energy Updates, see the Oracle Utilities Opower Proactive Alerts Cloud Service Product Overview.

High Usage Alerts
High usage alerts are digital communications sent through email, SMS, and voice to inform customers when they are expected to receive a higher energy bill.

A personalized alert threshold is available to customers who have High Bill Alerts AMI. For information on the applicable Cloud Service, see the Oracle Utilities Opower Proactive Alerts Cloud Service Product Overview. Depending on the characteristics of a customer’s accounts, the customer is provided one of the following options to define an alert threshold:

- **Cost threshold**: The cost threshold allows customers to specify a dollar amount as their personalized threshold. When the cost threshold is set, the customer will only receive a high bill alert when their cost exceeds the cost threshold. All active utility accounts for a customer must have modeled rates and are not defined as budget billing accounts for the customer to define a cost-based threshold.

  If a customer does not set their personalized threshold, they will only receive high bill alerts when they exceed the combined usage and cost threshold set by the utility. The recommended combined threshold is 30 percent.

- **Usage threshold**: The usage threshold allows the customer to set a percentage-based personalized threshold. When the usage threshold is set, the customer will only receive an alert when their energy use exceeds that threshold for the same billing period the previous year. The default usage threshold is 30 percent. The usage-based threshold is available to customers who are ineligible to define a cost-based threshold. This applies to customers with at least one active account without modeled rates or defined as a budget billing account.
Peak Pricing Alerts

Peak pricing alerts are digital communications sent through email, SMS, and voice to inform customers of peak pricing events. Customers can receive either Peak Time Rebate or Behavioral Demand Response communications. For more information on the applicable Cloud Services, see the Oracle Utilities Opower Behavioral Demand Response Cloud Service Product Overview and the Oracle Utilities Opower Peak Time Rebates Cloud Service Product Overview.

Data Browser

The Data Browser is an interactive tool that allows customers to visualize and explore their energy use trends and costs, and make comparisons to useful benchmarks, such as weather and similar homes. One or more graphs for Energy Costs, Energy Use, Water Costs, Water Use, Demand, and Neighbors are available in the feature. If applicable, customers can also use menus to switch between multiple accounts or service points.

Energy Costs Graph

The Energy Costs graph displays how much a customer was billed for energy use, based on their historical bill amounts. Customers can view energy costs for each bill over a 13-month period. If the required data is available for a customer, the customer can also view daily, hourly, and sub-hourly data. A line graph representing the average temperature over time is overlaid on the bar graph. (Weather data is based on the airport weather station closest to the customer’s home.) A customer with both electricity and natural gas can switch between views of their energy costs for each fuel type.
Tooltips are displayed when customers interact with a data point on the graph. See Energy Tooltips for details on what the tooltips may include.

**Energy Use Graph**

The Energy Use graph displays how much energy a customer used, based on their historical usage. Customers can use this information to understand how much energy they are using during various time periods. A line graph representing the average temperature over time is overlaid on the bar graph. (Weather data is based on the airport weather station closest to the customer’s home.) A customer with both electricity and natural gas can switch between views of their energy costs for each fuel type.
Tooltips are displayed when customers interact with a data point on the graph. See Energy Tooltips for details on what the tooltips may include.

Features for AMI Customers

The Energy Use graph displays how much energy a customer used. AMI customers can view daily energy use in the Bill view, as well as hourly or sub-hourly energy use in the Day view.

Tooltips are displayed when customers interact with a data point on the Energy Use graph. For AMI customers, a message is displayed at the bottom of tooltips for data points for each bill. This messaging acts as a tip for how a customer can quickly view hourly or sub-hourly data for a given bill.

Customers can also view energy costs and use for their energy use that has not yet been included on a bill. By default, up to 30 days of in-progress billing data is displayed to a customer, which can be configured to align with the length of a customer’s billing cycle.
Highest demand days are also highlighted to commercial and industrial customers in the Energy Use Bill view. For more information on demand data features, see “Demand Graph” on page 36.

Neighbors Graph

The Neighbors graph allows residential customers to compare their energy use against their neighbors over each billing period from last year. Three lines are displayed on the graph to compare the energy use of the customer, all neighbors, and efficient neighbors.

Based on what we know about you, we compare you to 100 similar homes with these characteristics:

- **Home size**: 1205 ft²
- **Heating type**: 60% have electric heat
- **Occupants**: about 3

Efficient neighbors are the 20% who use the least amount of energy. Visit your Home Energy Analysis to update your information and see what uses most.

SEE HOME ENERGY ANALYSIS
Customers can learn more about their neighbors by reviewing the characteristics of the homes that the customer is being compared to. Tooltips are displayed when customers interact with a data point on the graph. See Energy Tooltips for details on what the tooltips may include.

Demand Graph

The Demand graph visualizes demand (kW) and reactive power (kVAR) data for commercial and industrial customers. A line graph shows a customer's demand electricity use for a given day, with tooltips providing the exact values for each data point. Customers can scroll through each day to review their demand data use for that day. The Y-axis uses kW as the unit of measure. Highest demand days are also highlighted in the Energy Use Bill view.

**Note:** Bill view or Year view are not applicable or available for the Demand graph.

![Demand Graph](image)

**Highest Demand Interval**

A highest demand interval is highlighted with an icon on the Demand graph for the day of an applicable bill period that included the highest demand interval. This icon is also shown on the Energy Use graph for Bill view and Day view. The Bill view of the Energy Use graph allows customers to quickly determine the day that included the highest demand interval for a bill period, and then the customer can view that day in the Demand graph to determine the time of day that the event occurred.
**Note:** This icon is hidden from the Demand graph and Energy Use graph, as well as the legend for these graphs, for days that did not include the highest demand interval for a bill period. Bill view for the Energy Use graph always includes a Highest Demand Day.

Water Costs and Water Use Graphs

Customers who select the Water or Wastewater resource type can select to view the Water Use and Water Cost graphs. Customers can view data for each bill over a 13-month period. If the required data is available for a customer, the customer can also view daily, hourly, and sub-hourly data. A line graph representing the average temperature during each time period is overlaid on the bar graph. Weather data is based on the airport weather station closest to the customer’s home. Selecting the back and forward buttons allows customers to browse their water costs and use across time. A customer with both water and wastewater service can switch between views of their costs and use for each resource type.

The Water Costs graph displays how much a customer was billed for water or wastewater use based on the cost value sent to Oracle Utilities in the billing specification without any additional calculations on the values. The Water Use graph displays how much water or wastewater a customer used, based on the water or wastewater use value sent to Oracle Utilities in the billing specification.

![Water Use and Water Costs Graph](image)

The tooltips for each graph show values for water or wastewater cost or use respectively. Tooltips are displayed when customers interact with a data point on the graph. The following information can be included in a tooltip:
- **Time Period**: The time period for the data point. For example, a tooltip for a day data point displays the month and day.

- **Data Values**: The water or wastewater cost or use is shown along with the temperature for the applicable time period. Hyphens are displayed for any data value that is missing, such as missing weather data. If cost information is not available, the cost data is not included in the tooltip.

**Energy Tooltips**

A tooltip is displayed when a customer interacts with a data point in the Data Browser. At minimum, the tooltip includes the time period covered and the amount of energy used by the customer. Other elements of a tooltip vary depending on which view of the Data Browser is selected and what data is available.

**Time Period**: The time period for the selected data point. For example, a tooltip for a day data point displays the month and day.

**Energy Use**: The energy used for the selected fuel type (kWh, therms, and so on) and time period. Hyphens are displayed for any data that is missing.

**Energy Cost**: The cost of energy for the selected fuel type and time period. Energy costs are shown on tooltips for the Energy Costs graph. Hyphens are displayed for any data that is missing. The cost amounts typically do not include taxes and fees, and so do not match a customer’s bill. However, with additional setup and configuration, the costs can be made to match a customer’s bill. [Contact your Delivery Team](#) if you have any questions about this configuration.

**Energy Insight**: In the Neighbors graph, the energy tooltip provides insight into the customer’s energy use for the applicable time period as compared to their neighbors. For example, the tooltip may show that a customer used more, less, or about the same as their neighbors.

**Weather**: The average temperature for the selected time period. Weather data is available in the Energy Costs and Energy Use views. High and low temperatures are also provided when using the Year view or Bill view.

**Click Bar to View Each Day or Hour**: For customers with AMI data, a message is displayed in tooltips in the year view and bill view, directing customers to more granular data. This message allows customers to quickly view data for the days in a bill period or the hours in a day.

**Estimated Bills**: Estimated bills are listed as estimates in a tooltip. When unusual circumstances prevent a utility from obtaining an actual billing read for a customer, it is sometimes necessary to calculate 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. These messages can include a link to a utility web page for further explanation of how estimated bills work.

Cost Insights Bar

For each fuel type available in the Energy Costs graph, a bar is displayed beneath the graph to show additional cost insights. This bar is available for single fuel and dual fuel customers and displays only in the Year and Bill views.

**Year View:** The bar displays the average bill cost and total annual cost for the selected year. If the year is not yet complete, the average bill and total cost-to-date is shown. The bar can also include an insight about how the customer’s energy use equates to miles driven.

**Bill View:** The bar displays the customer’s average daily cost and total bill cost for the selected bill. If the bill period is not yet complete, then the daily average and cost to date is shown, and a link is displayed to take the customer to the Smart Dashboard, which includes a bill forecast. The bar can also include an insight about how the customer’s energy use equates to miles driven.

**Carbon Emissions / Miles Driven Insight:** The cost insights bar can include an insight explaining how the customer’s energy use equates to carbon emissions and miles driven. This information allows customers to understand their energy use in more practical, familiar terms. The insight is followed by a link to the US Environmental Protection Agency’s greenhouse gas equivalencies calculator.
**Note:** The carbon emissions insight is disabled by default since it depends on data from the US Environmental Protection Agency. It is therefore only available to utilities in the US. It can be enabled for US utilities upon request. If you do not know whether the insight has been enabled for your utility, contact your supervisor. Note that this insight is not available for water and wastewater views of the Data Browser, as there is no calculator to convert water usage to CO2 usage.

Customer Feedback

A customer feedback module is displayed at the bottom of the Data Browser.

Green Button - Exporting Billing and AMI Data

Customers can use the Green Button widget to export their billing and AMI data to CSV or XML formats. Customers can click on **Green Button Download My Data**, which displays options to download their data:

- **All Bill Totals**: The total bill costs for all available bills.
- **Bill Period Use**: Energy or resource use for a bill period. A bill period can be selected from a drop-down list. Customers can also select **Since your last bill** to view costs and use that has not yet been included on a bill. By default, up to 30 days of in-progress billing data can be downloaded, which can be configured to align with the length of a customer’s billing cycle.
- **Day Range Use**: Energy or resource use for a range of days. A start and end date can be selected to define the range of days.

The data within the download includes the fuel or resource type, applicable dates, energy use and costs, energy units, and any applicable notes for each data point.
**Note**: Green Button supports the download of data in units of measure that are applicable for the customer's resource types. For information on the units of measure supported by Oracle Utilities, see the [Oracle Utilities Opower Premise Data Transfer specification](#). If a customer has estimated reads, then this is indicated in the file that is downloaded. The Notes column indicates any applicable estimates. Otherwise, the Notes column is left blank.

Your Energy Use

Digital Self Service - Energy Management features can be included to educate customers on their energy use and self-serve account actions. These features are highlighted directly as part of a customer's Your Energy Use tools or are included throughout the Digital Self Service - Transactions web portal, as described below. The following Digital Self Service - Energy Management components can be included as optional add-ons:

- **Bill Comparison**, which allows customers who are viewing their electricity, gas, water, or wastewater costs on the Overview dashboard and the Billing and Payment options to compare their costs to previous bills. This feature is highlighted as a "Billing and Payment" on page 10 tool.

- **Bill Forecast**, or Projected Bill, which shows customers their current electricity and gas use or cost so far in the billing period along with their projected usage or cost for the billing period. A comparison to their typical usage or cost for the period is also provided. Customers with water or wastewater service can also view a forecast for their water or wastewater use. Applicable costs are not included in water or wastewater forecasts. This feature is highlighted as a "Billing and Payment" on page 10 tool.

- **Highest Energy Use Days**, which displays a calendar that highlights the top five days of the month in which a customer used the most energy for electric and gas. This insight helps customers identify patterns in their energy use. This feature is listed as a Your Energy Use tool.

- **Home Energy Analysis**, which guides customers through a survey to determine their home attributes and energy habits for electricity and gas use. This information is used to provide customers with a better understanding of how they use energy. This feature is listed as a Your Energy Use tool.

- **Neighbor Comparison**, compares residential customers to two groups based on their electricity and gas use: “Efficient Neighbors” and “Average Neighbors.” The results are displayed in a horizontal bar graph. This feature is listed as a Your Energy Use tool.

- **Next Best Action**, which provides dynamic and actionable web banners that can be shared with all customers or targeted to specific customer groups. The web banners
guide customers to the most valuable opportunities or solutions available and helpful tools to help them manage energy use and cost. This feature is highlighted on the "Overview Dashboard" on page 6.

- Ways to Save, which presents energy saving tips for the customer to review and complete. This feature is listed as a Your Energy Use tool. In addition to the standard energy savings tips available with Digital Self Service - Energy Management Ways to Save, Digital Self Service - Transactions can include:
  - Water and wastewater savings tips for both indoor and outdoor water use, which are available for water and wastewater customers.
  - Energy savings tips that are applicable to commercial customers. All residential energy savings tips are also hidden for commercial customers.

- Tips Light, which guides customers on the Overview dashboard to the Ways to Save energy saving tips. This feature is listed as a Your Energy Use tool and is also highlighted on the "Overview Dashboard" on page 6.

In addition to these features, the Data Browser provides in-depth analysis of a customer’s energy costs and use, and Green Button allows customers to export their billing data. These features are available directly with Digital Self Service - Transactions Cloud Service and are listed in the Your Energy User tools as Energy Use Details. For more information on these feature, see "Data Browser" on page 32 and "Green Button - Exporting Billing and AMI Data" on page 40.

See the Oracle Utilities Opower Digital Self Service - Energy Management Cloud Service Product Overview for more information.

Personalized Navigation

Personalized navigation ensures that a customer only sees the Digital Self Service - Energy Management features that relate to their services. For example, the Home Energy Analysis is hidden for customers who only receive water and wastewater service.

Help Center

The help center provides customers with options to answer questions they have about their utility bill or service. Customers can also act on common customer tasks.
Ask a Question

Customers can ask questions to receive information and guidance on their specific needs. Categories are available to guide customers to provide the required information for their questions. Attachments can be included with a customer’s question to provide additional information, such as a picture of a broken meter or an image of an issue they are having with their online utility account.

A customer’s full question history, including any responses from the utility, is available from the help center. Customers can view their resolved questions and respond to any of their pending questions with follow up information.

Do it Yourself Actions

Customers looking to complete certain tasks can review the available actions they can do online. This list highlights features available with Digital Self Service - Transactions that customers can complete themselves. The highlighted actions include common tasks such as enrolling in billing programs including autopay and paperless billing, starting or stopping service, updating account information, or viewing and reporting service outages.

Contact Support

Applicable phone, email, and mail support contact information is available to customers.
Authentication

Authentication refers to the ways that a customer can securely access the Digital Self Service - Transactions web portal. Single sign-on (SSO) is the supported authentication method, and each utility can use a third-party identity provider or use Oracle’s Identity Cloud Service. In addition, some CSRs may be able to access a customer's Digital Self Service - Transactions web portal accounts to help them troubleshoot issues they encounter.

Single Sign-On (SSO)

SSO allows customers to use the same username and password to access the web portal and any other web applications provided by a utility. All usernames and passwords are created, maintained, and updated by the identity provider.

SSO requires that all authentication is handled by the identity provider. After a customer has been authenticated using the sign-in options, the customer has access to all features and pages of the Digital Self Service - Transactions Web Portal.

**Note:** Since SSO credentials are maintained by the identity provider, customers cannot use the Account Center in the Digital Self Service - Transactions Web Portal to change their password.

Account Creation

The landing page of the Digital Self Service - Transactions web portal provides customers an option to create a new account. New customers are often directed to this landing page through communications.

**Entering an Email and Password:** A customer must provide an email and password for their new account. Passwords must meet the policy configured in the utility's identity provider. Depending on the utility's setup and configuration, the following additional password requirements may apply:

- Minimum number of digits
- Minimum number of special characters
- Minimum lower-case characters
- Minimum upper-case characters
- Must be different than previous password
Completing this step sends a confirmation email to the email address the customer supplied, which the customer then uses to verify the email address.

**Account Sign In and Sign Out**

Customers who have created their web account can use their web account email address and password to sign in from the landing page. A standard link is available throughout the Digital Self Service - Transactions Web Portal for signing out. By default, sessions timeout after 30 minutes of inactivity, at which point the user is automatically signed out.

**Password Reset**

Customers can request a password reset if they have forgotten their current password. To complete this process, a customer first selects the *Forgot password?* option included with the account sign-in options. The customer is prompted to enter their web account email address, to which a reset password email is sent. The email includes a link that directs the customer to a reset your password page, which prompts the customer to create and confirm their new password.

**Providing Customer Support**

Customer Service Representatives (CSRs) with the proper permissions can access customer web accounts in the Digital Self Service - Transactions Web Portal. If you are unsure if your account has been granted the proper permissions to perform the support activities listed in this documentation, contact your supervisor.

**Note:** Digital Self Service - Energy Management features can be included as add on features to the Digital Self Service - Transactions web portal. Many of these features are provided as part of "Your Energy Use" on page 41. For customer support capabilities related to Digital Self Service - Energy Management features, see [Supporting Digital Self Service - Energy Management](#).

**Finding a Customer's Account**

Customers often have questions that can be easily answered by finding and accessing their account. When searching for customers, providing exact information such as the exact email address or exact web username can return a single result for the correct customer.
You can also perform customer searches with wildcards in place of exact values using the % character. For example, to search for all customers with a specific type of email account such as @example.com, you can search on email address using the search phrase %@example.com. As another example, you can search for all customers with the username John using the search phrase %John%.

Note: Depending on your utility’s setup and configuration, some extra search options may be available.

To find and open a customer’s account:

1. Sign in to the Digital Self Service - Transactions Web Portal with CSR user account and password.
2. Click Admin. The Customer Search options are displayed.
3. You can search for customers by their Username or Email address.
4. After including your search query, click Search. All applicable customer accounts are displayed. Refine your search based on the results and search again if needed. For information on accessing a customer’s account, see “Accessing a Customer's Account” on page 46.

Accessing a Customer’s Account

Customer Service Representatives with the proper permissions can access a customer’s Digital Self Service - Transactions Web Portal account to assist with questions and troubleshooting. When you do this, you can see the Digital Self Service - Transactions Web Portal much like the customer sees it. This process is also referred to as masquerading. You can review information for the customer’s account as well as make changes on their behalf.

Note: Be aware that any changes completed while logged in to the customer’s account are saved. If you and the customer are on the Digital Self Service - Transactions Web Portal at the same time, any changes made are preserved for the last person that saves their updates.

To access a customer’s account:

1. Sign in to the Digital Self Service - Transactions Web Portal with CSR user account and password.
2. If you need to locate a particular customer account, follow the steps to find a customer account, as described in “Finding a Customer's Account” on page 45
3. Click **View User Pages** for the customer account you need to access. The Digital Self Service - Transactions Web Portal opens in the same browser tab, displaying the Overview Dashboard for the applicable customer account. You can now see and interact with the web portal as the customer sees it, and you will have an easier time troubleshooting or answering questions.

4. If you need to perform additional customer searches, click **Admin** to return to the customer search options. Be aware that the **Admin** link is hidden from customers.

**Finding Self-Service Tasks**

Certain customer interactions with Digital Self Service - Transactions generate self-service tasks. These tasks can require processing to complete certain customer tasks or requests. You can use your applicable Oracle Utilities product to find and process self-service tasks as required.

**Note:** This documentation provides steps to complete these configuration tasks using Oracle Utilities Customer Care and Billing. However, many of these tasks can be completed with other applicable products such as Oracle Utilities Customer to Meter or Oracle Utilities Customer Self Service. Refer to your applicable product documentation for steps to complete the configuration using your Oracle Utilities product. For additional details on these tasks, refer to the applicable Oracle Utilities Documentation.

**To find self-service tasks:**

1. Open Customer Care and Billing.
2. From **Menu**, select **Self-Service**, and then select **Self-Service Tasks**. The Self-Service Task Query is displayed.
3. Provide the applicable information to search for self-service tasks. There are multiple options to search for self-service tasks such as customer name, self-service email address, or service task ID which can be used to provide the task confirmation number. For searches that do not use the exact service task ID, you can also use the **Service Task Type** drop-down list to limit the self-service tasks to a particular type. After you have supplied the search criteria click **Search**. All applicable self-service tasks are displayed.
4. From the search results, select the **Service Task** link to access the self-service task.
List of Self-Service Tasks

The following self-service tasks can be created by Digital Self Service - Transactions features.

<table>
<thead>
<tr>
<th>Features</th>
<th>Self-Service Task Types</th>
</tr>
</thead>
</table>
| "Billing Communications" on page 26 | - Prepaid Billing Payment Request Notification Task  
- Late Payment Notification Task  
- Payment Received Notification Task  
- Bill Due Notification Task  
- Bill Ready Notification Task |
| "Help Center" on page 42 | Self-Service Task Types to support contact us actions submitted by a customer depend on the utility configuration. Contact your supervisor if you have questions. |
| "View Bill " on page 10 | One Time Payment Task |
| "Manage Billing" on page 15 | - Budget Billing Setup Task  
- Automatic Payment Setup Task  
- Charity Contribution |
| "Manage Web Account" on page 21 | Invite Guest User |
| "Start, Stop, and Transfer Service" on page 18 | - Start/Stop Task  
- Verify Account (AND/OR)  
- Account Verification Task |
| "Payment Arrangement" on page 17 | Self-Service Task Types to support payment arrangement enrollment depend on the utility configuration. Contact your supervisor if you have questions. |

Feature-Specific Support

This section provides FAQs and support procedures related to specific Digital Self Service - Transactions features. If you have any questions about which products are included in your program, contact your supervisor.
Supporting Billing and Payment

As a CSR, you have various options to manage billing and payment tasks and inquiries for your customers. Some options may be hidden depending on which products are provided by your utility.

Below are common billing and payment actions you may take on a customer's account.

**Note:** Digital Self Service - Transactions masquerading feature does not include the ability to make a payment for the customer.

Common Support Tasks:

- **Answer frequently asked questions**
- "Downloading Billing and Payment Information" on page 49
- "Managing Billing Program Enrollment " on page 50

Billing and Payment FAQs

**What is Payment Towards Previous Balance?**

If you have a past due account balance and have made a payment your payment is automatically applied to your existing balance before being applied to new charges. If your Bill Details indicates that you have made a payment towards your previous balance, the payment amount is reflected there before the cost of any new charges. Your total reflects your new charges plus your previous balance when applicable, less payments towards your previous balance.

**Why was my projected bill amount different than the amount on my bill?**

We do our best to let you know what you can expect to spend on your bill each month, but sometimes, our algorithms don't get it quite right. This can be due to a number of factors including your usage over the course of your billing period, taxes, or other fees.

**How do I unenroll from a payment arrangement?**

If you’re enrolled in a payment arrangement plan, we’ll help you with unenrollment over the phone.

**Downloading Billing and Payment Information**

As a CSR, you can download billing and payment information for a customer’s account.
**Downloading a Customer's Current Bill**

Complete the following steps to download a customer's current bill.

**To download a customer's current bill:**

1. Sign in to the Digital Self Service - Transactions Web Portal with CSR user account and password.
2. Access a customer's account and masquerade as the customer. For complete steps to complete this task, see "Accessing a Customer's Account" on page 46.
3. While masquerading as the customer, from **Billing and Payment**, select **View Bill**. The customer's current bill is displayed.
4. Select **View bill (PDF)** to download a PDF version of the customer's bill.

**Downloading Billing and Payment History**

Complete the following steps to download billing and payment history for a customer.

**To download billing and payment history:**

1. Sign in to the Digital Self Service - Transactions Web Portal with CSR user account and password.
2. Access a customer's account and masquerade as the customer. For complete steps to complete this task, see "Accessing a Customer's Account" on page 46.
3. While masquerading as the customer, from **Billing and Payment**, select **View Bill**. The customer's billing and payment history is displayed.
4. Select **Download History** to download the customer's billing and payment history as a comma separated value (CSV) file.

**Managing Billing Program Enrollment**

As a CSR, you can enroll or unenroll customers from programs configured by the utility that are used to manage the payment of their utility bills.

**To manage billing program enrollment:**

1. Sign in to the Digital Self Service - Transactions Web Portal with CSR user account and password.
2. Access a customer's account and masquerade as the customer. For complete steps to complete this task, see "Accessing a Customer's Account" on page 46.
3. While masquerading as the customer, from **Billing and Payment**, select **Manage Billing**. The billing programs available to the customer are displayed.
4. Select the program that the customer is interested in modifying their enrollment. You can then select to enroll or unenroll the customer. Be aware that modifications to some programs such as automatic payments may require processing before they are completed.

Supporting Start, Stop, and Transfer Service

As a CSR, you can manage service changes for your customers. Some options may be hidden depending on which products are provided by your utility.

Below are common actions you may need to take with Start, Stop, and Transfer service requests.

Common Support Tasks:
- Answer frequently asked questions
- "Starting or Transferring Service for a Customer" on page 51

Start, Stop, and Transfer Service FAQs

Why do you need my driver’s license or social security number to start service?
We take our customers’ personal data seriously. We want to ensure that we’re only starting service in the name of the person who has actually requested the service. For this reason, we use personal identifiers to verify identities prior to making account changes.

How do I get started if I am a new customer?
Click the Start & Stop Service link. Choose the I am a new customer option and complete the required fields.

How do I get started if I have had service before?
Click the Start & Stop Service link in the main navigation. Choose the I am an existing or former customer option and complete the required fields.

Starting or Transferring Service for a Customer
As a CSR, you can manage service changes for your customers. Some options may be hidden depending on which products are provided by your utility.

Start Service
Complete the following steps to start utility service for a customer.
To start service for a customer:

1. Sign in to the Digital Self Service - Transactions web portal with CSR user account and password.
2. Access a customer’s account and masquerade as the customer. For complete steps to complete this task, see "Accessing a Customer's Account" on page 46.
3. While masquerading as the customer, select Start & Stop Service. The start and stop service options are displayed.
4. Select Add Service and complete all required fields to start the new utility service for the customer.

Transfer Service

Complete the following steps to transfer utility service for a customer.

To start service for a customer:

1. Sign in to the Digital Self Service - Transactions web portal with CSR user account and password.
2. Access a customer’s account and masquerade as the customer. For complete steps to complete this task, see "Accessing a Customer's Account" on page 46.
3. While masquerading as the customer, select Start & Stop Service. The start and stop service options are displayed.
4. Select Transfer Service and complete all required fields to transfer the utility service for the customer.

Supporting Web Account Management

As a CSR, you have various options to manage web account preferences for your customers. Some options may be hidden depending on which products are provided by your utility.

Common Support Tasks:

- Answer frequently asked questions
- See "Updating Web Login Information" on page 53.
- See "Connecting and Unlinking Accounts" on page 54.
- See "Managing Guest Users" on page 55.
- See "Modifying the Account Nick Name" on page 56.
Depending on your configuration, customers might be required to contact the utility to change the name associated with their account. Contact your supervisor for instructions on how to update the name of the main customer associated with an account.

Manage Web Account FAQs

Why can't I change my name?
We take our customers’ personal data very seriously, therefore, the person who is currently named on the bill must request this change.

What are connected accounts?
You may have multiple utility accounts linked to their web login for Digital Self Service - Transactions. Each utility account has a nickname, account ID, and address. A Premises expand displays additional addresses for utility accounts with multiple addresses. You can connect new accounts to your web login so it’s easy to manage all of your accounts in one place. This is a common task when starting a new utility service.

Why am I a guest on some accounts?
A utility account holder has given you access to their account information online. Depending on your role, this could give you permission to view information or make payments.

Updating Web Login Information
As a CSR, you can help customers update their web login information. The steps to update this information depend on whether your utility has configured authentication through Oracle Utilities Identity Cloud Service or through a separate third-party identity provider.

To update web login password for Identity Cloud Service authentication:

1. Sign in to the Digital Self Service - Transactions Web Portal with CSR user account and password.
2. Access a customer’s account and masquerade as the customer. For complete steps to complete this task, see "Accessing a Customer's Account" on page 46.
3. While masquerading as the customer, select Manage Web Account. The customer’s web account information is displayed.
4. From the Web Login Details area, select Edit. A prompt to update the password is displayed.
5. Enter the customer’s previous password and the new password.

If the customer does not know their current password, you must return to the main login
page and use the Forgot Password link. Completing the forgot password steps sends a
reset password link to the customer’s email address. Work with the customer to reset the
password as required.

To update web login information for a third-party identity provider:

1. Sign in to the Digital Self Service - Transactions Web Portal with CSR user account and
   password.
2. Access a customer’s account and masquerade as the customer. For complete steps to
   complete this task, see "Accessing a Customer's Account" on page 46.
3. While masquerading as the customer, select Manage Web Account. The customer’s
   web account information is displayed.
4. From the Web Login Details area, select Edit email and password. This link redirects
   you to your utility’s third-party identity provider. Contact your supervisor for instructions
   on how to update web login information using your third-party identity provider.

Connecting and Unlinking Accounts
As a CSR, you can help customers connect or unlink accounts for their utility service.

Connecting Accounts
As a CSR, you can help customers connect accounts for their utility service.

Note: By default, only the main customer account can be connected to the utility
account. To connect additional accounts, you must first invite them as guest users, as
described in See "Managing Guest Users" on page 55..

To connect a new account:

1. Sign in to the Digital Self Service - Transactions Web Portal with CSR user account and
   password.
2. Access a customer’s account and masquerade as the customer. For complete steps to
   complete this task, see "Accessing a Customer's Account" on page 46.
3. While masquerading as the customer, select Manage Web Account. The customer’s
   web account information is displayed.
4. From the Connected Accounts area, select Connect New Account. Complete the
   prompts to provide the required information to connect the account.

Unlinking Accounts
As a CSR, you can help customers unlink a connected account from their utility service.
To unlink a connected account:

1. Sign in to the Digital Self Service - Transactions Web Portal with CSR user account and password.
2. Access a customer’s account and masquerade as the customer. For complete steps to complete this task, see "Accessing a Customer's Account" on page 46.
3. While masquerading as the customer, select Manage Web Account. The customer's web account information is displayed.
4. From the Connected Accounts area, select Unlink Account for the account to unlink. Select Yes to confirm the unlink action.

Managing Guest Users
As a CSR, you can help customers create and manage guest users that can access the customer's utility account.

Inviting Guest Users
As a CSR, you can help customers invite guest users to access their utility account.

To invite a guest user:

1. Sign in to the Digital Self Service - Transactions Web Portal with CSR user account and password.
2. Access a customer’s account and masquerade as the customer. For complete steps to complete this task, see "Accessing a Customer's Account" on page 46.
3. While masquerading as the customer, select Manage Web Account. The customer’s web account information is displayed.
4. From the Connected Accounts area, select Add Guest User for the account to invite guest users to.
5. Complete the contact information for the guest user. You must also select the level of access granted to the guest user. Select an option from the Access Level drop-down list to learn more about what permissions the access level provides the guest user.
6. Select Add Guest User to complete the guest user invitation. A notification is sent to the email address you provided for the guest user, providing the guest user with a link to accept the invitation.

Removing Guest Users
As a CSR, you can help customers remove guest users from their utility account.

To invite a guest user:
1. Sign in to the Digital Self Service - Transactions Web Portal with CSR user account and password.

2. Access a customer’s account and masquerade as the customer. For complete steps to complete this task, see "Accessing a Customer’s Account" on page 46.

3. While masquerading as the customer, select Manage Web Account. The customer’s web account information is displayed.

4. From the Connected Accounts area, select the Guest Users expand to display the guest users for an account.

5. Select Remove Guest User to remove the guest user from the account. Select Remove Guest User again to confirm the removal. The guest user is removed from the account. The guest user is not provided notification that they have been removed from the account.

Modifying Permissions for Guest Users

As a CSR, you can help customers modify the level of access for guest users on their utility account.

To modify permissions for a guest user:

1. Sign in to the Digital Self Service - Transactions Web Portal with CSR user account and password.

2. Access a customer’s account and masquerade as the customer. For complete steps to complete this task, see "Accessing a Customer’s Account" on page 46.

3. While masquerading as the customer, select Manage Web Account. The customer’s web account information is displayed.

4. From the Connected Accounts area, select the Guest Users expand to display the guest users for an account.

5. Select Change Access Level for the applicable guest user account.

6. From the Access Level drop-down list, select the access level to apply for the guest user.

7. Select Save to save any changes.

Modifying the Account Nick Name

As a CSR, you can help customers to modify the nick name for their account.

To modify the account nick name:

1. Sign in to the Digital Self Service - Transactions Web Portal with CSR user account and password.
2. Access a customer's account and masquerade as the customer. For complete steps to complete this task, see "Accessing a Customer's Account" on page 46.

3. While masquerading as the customer, select **Manage Web Account**. The customer's web account information is displayed.

4. From the **Connected Accounts** area, select the pencil icon next to the account.

5. Update the account nick name and select **Save**.

**Supporting Alerts and Notifications**

Alerts and notifications are typically informational only and therefore, there are no additional steps to support them. Frequently asked questions are available to help answer customer questions related to their alerts and notifications.

**Common Support Tasks:**

- [Answer frequently asked questions](#)

**Alerts and Notifications FAQs**

**What is the difference between an alert and a notification?**

Alerts are considered critical information about your account and are displayed directly on the Overview Dashboard. You can scroll through all critical alerts.

Notifications are considered non-critical information. Customers with more than one non-critical notification see a summary of notifications on the Overview Dashboard with the total number of non-critical notifications.

All active alerts and notifications are available to customers in the Notification Center.

**How are these alerts and notifications different from my billing and payment alerts or energy use communications and alerts?**

Alerts and notifications cover areas such as payments, billing information, and account status updates and they appear within the web portal.

Billing and payment alerts and energy use communications and alerts are sent to the customer through different channels, such as email and SMS.
Supporting Billing Communications

As a CSR, you have various options to manage billing communication preferences for your customers. Some options may be hidden depending on which products are provided by your utility.

Common Support Tasks:

- Answer frequently asked questions
- See "Modifying Contact Methods" on page 59.
- See "Modifying Bill Delivery" on page 60.
- See "Modifying Billing and Payment Alerts" on page 61.

Billing Communications FAQs

Why can’t I remove a contact method?
A minimum of one primary contact method is required for each contact type that you have included for your account. For example, if you include phone number contacts for your utility account, one must be defined as the primary phone contact. The primary contact methods cannot be deleted but can be modified if you need to update it.

Why am I getting a physical bill in the mail?
Your billing preferences are currently set to mail delivery. If you would like to enroll in paperless billing, click the Enroll in Paperless Billing link and follow the steps to complete enrollment.

Why am I getting emails from you?
We hope these billing and payment alerts can keep you informed of available programs and offers, your bill status, and payment information so that you can plan for the respective expenses.

How can I unsubscribe?
You can unsubscribe from billing and payment alerts in a number of ways, though how you unsubscribe will depend on your utility’s program design.

The recommended method is to change your preferences using the Billing and Payment Alerts options available from your billing communications preferences. If you unsubscribe in this way, you will be able to subscribe again in the future.
Modifying Contact Methods

As a CSR, you can make modifications to a customer's contact methods that can be used for billing communications.

Adding a Contact Method

Complete the following steps to add a contact method.

To add a contact method:

1. Sign in to the Digital Self Service - Transactions Web Portal with CSR user account and password.
2. Access a customer's account and masquerade as the customer. For complete steps to complete this task, see "Accessing a Customer's Account" on page 46.
3. While masquerading as the customer, from Notifications, select Billing. The customer’s billing communication preferences are displayed.
4. Select Add a contact to begin creating a new contact method.
5. Complete all required information for the contact method. You can also select Set as primary to define the contact method as a primary contact method.
6. Select Create to complete the creation of the contact method.

Editing a Contact Method

Complete the following steps to edit a contact method.

To edit a contact method:

1. Sign in to the Digital Self Service - Transactions Web Portal with CSR user account and password.
2. Access a customer’s account and masquerade as the customer. For complete steps to complete this task, see "Accessing a Customer's Account" on page 46.
3. While masquerading as the customer, from Notifications, select Billing. The customer’s billing communication preferences are displayed.
4. Select Edit for the contact method to modify. Make all applicable changes and select Save.

Removing a Contact Method

Complete the following steps to remove a contact method.

Note: Primary contact methods cannot be removed.
To remove a contact method:

1. Sign in to the Digital Self Service - Transactions Web Portal with CSR user account and password.
2. Access a customer’s account and masquerade as the customer. For complete steps to complete this task, see "Accessing a Customer's Account" on page 46.
3. While masquerading as the customer, from Notifications, select Billing. The customer’s billing communication preferences are displayed.
4. Select Remove to remove the applicable contact method. Select Yes Remove Contact to confirm the removal.

Modifying Bill Delivery

As a CSR, you can modify how a customer's bill is delivered.

Enrolling in Paperless Billing

As a CSR, you can enroll a customer in paperless billing and modify how a customer's bill is delivered.

To enroll in paperless billing and modify bill delivery:

1. Sign in to the Digital Self Service - Transactions Web Portal with CSR user account and password.
2. Access a customer’s account and masquerade as the customer. For complete steps to complete this task, see "Accessing a Customer's Account" on page 46.
3. While masquerading as the customer, from Notifications, select Billing. The customer’s billing communication preferences are displayed.
4. From the Bill Delivery section, select Enroll in Paperless Billing. The paperless billing program details are displayed.
5. Select Enroll to enroll the customer in paperless billing using the primary email address. If a customer wants to use a different email address, you can define a different email address as the primary email contact method, as described in "Modifying Contact Methods" on page 59.

Unenrolling in Paperless Billing

As a CSR, you can unenroll a customer from paperless billing and select the correct mailing address for bill delivery.

To unenroll in paperless billing and modify bill delivery:
1. Sign in to the Digital Self Service - Transactions Web Portal with CSR user account and password.

2. Access a customer's account and masquerade as the customer. For complete steps to complete this task, see "Accessing a Customer's Account" on page 46.

3. While masquerading as the customer, from Notifications, select Billing. The customer's billing communication preferences are displayed.

4. From the Bill Delivery section, select Unenroll in Paperless Billing. The paperless billing program details are displayed.

5. Select Unenroll to unenroll the customer from paperless billing and deliver their bill to their primary mailing address.

6. From Notifications, select Billing to return to the customer's billing communication preferences.

7. If a customer wants to use a different mailing address, from the Bill Delivery section, select Edit for the bill delivery contact method and make any required changes. Select Save to save any changes.

Modifying Billing and Payment Alerts
As a CSR, you can modify the billing and payment alerts that a customer is set up to receive.

To modify billing and payment alerts:

1. Sign in to the Digital Self Service - Transactions Web Portal with CSR user account and password.

2. Access a customer's account and masquerade as the customer. For complete steps to complete this task, see "Accessing a Customer's Account" on page 46.

3. While masquerading as the customer, from Notifications, select Billing. The customer's billing communication preferences are displayed.

4. From the Billing and Payment Alerts section, review the billing and payment alerts that the customer is enrolled in.

5. Select the plus icon to enroll in new alerts and provide an applicable contact method. Repeat this step for each billing and payment alert to enroll the customer in.

6. Select remove from the contact method for a billing and payment alert to unenroll the customer. Repeat this step for each billing and payment alert to unenroll the customer in.

7. Select Save to save all changes.
Supporting Help Center

The Help Center provides customers with options to answer questions they have about their utility bill or service. Customers can also take action on common customer tasks.

As a CSR, you can direct a customer to the help center to submit a support request by using one of the utility configured support topics.

Common Support Tasks:

- **Answer frequently asked questions**
- When a customer submits a question, a self-service task record is created. The question history summarizes all of the questions that the customer has submitted and distinguishes between those that are pending and resolved. CSRs may add comments on the request. Customers may comment on pending questions to respond to the utility when needed in the additional message field on the question page. When the utility closes the customer self-service task, the question is considered resolved and customers can no longer add comments. For information on finding self-service tasks for a customer, see "Finding Self-Service Tasks" on page 47.

Help Center FAQs

**What file formats can I send?**

Supported file types are defined by your utility. Contact your supervisor to confirm what type of files customers can send you as part of support requests.

**Where are files stored when I send them in a support request?**

File destination is defined by your utility. Contact your supervisor to confirm where files are stored.

**What questions can I submit?**

Question topics are defined by your utility and are available from the Select a topic drop-down list.