

# Oracle Utilities Distributed Energy Resources Customer Engagement Cloud Service Configuration Guide



Latest Release

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The Oracle logo, consisting of a solid red square with the word "ORACLE" in white, uppercase, sans-serif font centered within it.

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Oracle Utilities Distributed Energy Resources Customer Engagement Cloud Service Configuration Guide, Latest Release

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# 1

## Getting Started

This guide is used during the Oracle Utilities Opower launch process to provide product design information, collect utility configuration preferences for the products being launched, and track the finalization of these preferences. The preferences are then used to set up your Oracle Utilities Opower products and platform.

This guide focuses on configuration preferences for the Oracle Utilities Opower Distributed Energy Resources Customer Engagement program.

## Product Overview

As utility customers become active participants in the energy grid, generating and storing their own energy, their energy management needs are becoming more complex. The Distributed Energy Resources Customer Engagement Cloud Service provides features that enable utility companies to increase customer education, engagement, and satisfaction.

The Distributed Energy Resources Customer Engagement Cloud Service, in conjunction with the Digital Self Service - Energy Management Cloud Service, includes features that:

- Onboard new solar customers by educating them about their solar bills before they receive them.
- Educate customers about their energy usage and additional steps they can take to save energy as they move through their solar journey.
- Engage customers by showing them the value and financial benefits of their investment, and increase self-service by leading them to solar features and insights on the web.

## Understanding Solar Billing

### Note

Before using this product, it is recommended that you understand the meaning of net metering and net billing. These examples help to explain the difference. These examples have been purposely simplified to illustrate the differences in the two models, and might not reflect the actual billing practices of your utility.

For additional information, see the [Oracle Utilities Opower Digital Self Service Energy Management Product Overview](#).

### **Net Energy Metering (Monthly or Annual)**

Bills for net energy metering customers are based on the net amount of energy that is exported and imported, and the customer pays a single rate for the remaining amount. This model can be used for monthly or annual billing, and is referred to as net metering monthly or net metering annual. In this model, the same amount is used to calculate the charges for energy that is imported or exported. For example:

- The customer imports 200 kWh of energy this month.

- The customer exports 150 kWh of energy this month.
- The customer will be charged for 50 kWh as follows, depending on whether they are monthly or annual:
  - **Net Metering Monthly Customers:** Customers will pay off this charge when they receive their monthly bill.
  - **Net Metering Annual Customers:** Customers will receive a bill that includes their standard monthly fee, plus a charge for the 50 kWh. However, they only pay the fee this month. The charge for the 50 kWh is added to an accruing balance. The customer then pays the accrued balance in full when they reach their annual billing date.

### Net Billing (Monthly Only)

Net billing customers are charged for the energy they import and credited for electricity they export at two different rates. The actual energy charge is based on the net of the calculated amounts. This type of billing only happens on a monthly basis. For example:

- The utility pays the customer \$1 for every kWh they export. This month, the customer exports 150 kWh of energy, totaling \$150.
- The utility charges the customer \$2 for every kWh they import. This month the customer imports 200 kWh, totaling \$400.
- The customer's net billing amount (excluding fees, taxes, etc.) is  $\$400 - \$150 = \$250$ .

### Buy All/Sell All

Buy All/Sell All Customers sell all of the energy they generate to the utility at a specified rate. They also buy all of the energy they use from the utility at a different rate.

Two meters are required for Buy All/Sell All customers:

- One meter to measure solar generation
- One meter to measure import and export (NET) between the home and the utility grid

Consumption is calculated based on the values of these meters, without regard for how much is pulled from the grid or from solar panels.

For example, a customer might generate 100 kWh and sell it all to the utility at the rate of \$1 per kWh. The customer might also consume 200 kWh, all of which they buy from the utility at the rate of \$2 per kWh. Therefore, the customer's bill (not including fees, taxes, etc.) would include a \$100 credit for what was sold to the utility and a \$400 charge for what they used, resulting in a net charge of \$300.

## Disclaimer

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

# 2

## Design and Configuration

The Oracle Utilities Opower platform allows for product configurations and customizations to meet the needs of each utility. A *configuration* is a simple change that can be made with no coding required. There are required configurations and optional configurations. A *customization* is a change that requires more in-depth technical work, design, or coding to alter the appearance or behavior of the product, or to create something new within the product.

This guide provides only a summary of configuration options. Customization options may be available for your program at cost as an Oracle Utilities Opower professional service offering. Ask your Service Delivery Manager how customization options could enhance your program.

### Note

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

### Default Text and Options

Unless otherwise noted, Oracle recommends that you use the default text and options that are provided. These options have been chosen carefully by our copywriters and have been through user testing to maximize comprehension and effectiveness. If you must configure an option to use something other than the default, be aware of the following:

- While you can configure the text that appears, you cannot change the logic behind the text.
- Using options and text other than the default could impact the effectiveness of your program.

The following sections discuss the design, configuration options, and the user experience variations that are specific to the Distributed Energy Resources features.

### Features Available for Configuration

These features are available for configuration:

- [Solar Web Features](#)
- [Solar Update Notifications](#)

## Configuration of Solar Web Features

This section discusses how to configure solar web features, which include:

- [Solar features on the Data Browser](#)
- [Solar messaging in Bill Comparison](#)
- [Solar messaging in Bill Forecast](#)

## Solar Features on the Data Browser

Solar customers who navigate to the Electricity View in the Digital Self Service - Energy Management Data Browser can view information about their solar program. Solar features provide simplified, detailed solar information that customers can easily understand. Solar customers are shown how to properly read their positive and negative consumption data, and how to interpret complex solar bills.

The following solar features are available on the Data Browser page:

- [Solar Welcome Experience](#)
- [Billing Insight](#)
- [Solar Savings Insight](#)
- [Compare to Last Year View](#)

## Display Rules for Solar Web Insights

The following display rules apply to solar web insights in the Data Browser:

- Insights only appear on the Electricity tab in the Data Browser. They do not appear on the Combined or Gas tabs.
- The monthly Billing Insight that displays above the graphs only appears on the **Bill View** in both the Cost and Usage charts.
- The annual Billing Insight that displays above the graphs only appears on the **Year View** in both the Cost and Usage charts.
- The Green Box Insight that displays beneath the Data Browser chart only appears for Net Billing customers.
- The following solar insights appear on the **Year, Bill, and Day** views on the Cost and Usage charts:
  - **Most Recent Bill** section of the monthly Billing Insight
  - Solar Savings Insights
  - Expandable Welcome Experience
- The Solar Savings Insight is not displayed in the **Neighbor** view.
- The **Compare to Last Year** tab only appears for solar customers. The Compare to Last Year functionality is available in its own view and is not displayed on Usage or Cost charts.

## Solar Welcome Experience

Solar customers who navigate to the Electricity view in the Digital Self Service - Energy Management Data Browser for the first time after their solar panels become operational, are shown the Solar Welcome Experience. This feature details solar information in a simplified format that customers can easily understand. Customers will see a **Solar Billing Overview** and an **Energy** or **Electricity Use Overview** that shows them how to properly read positive and negative consumption data, and how to interpret complex solar bills.

On subsequent visits to the **Electricity** view, the Solar Welcome Experience is not displayed, but is accessible by clicking **Learn How Solar Billing Works** at the bottom of the page.



## Design

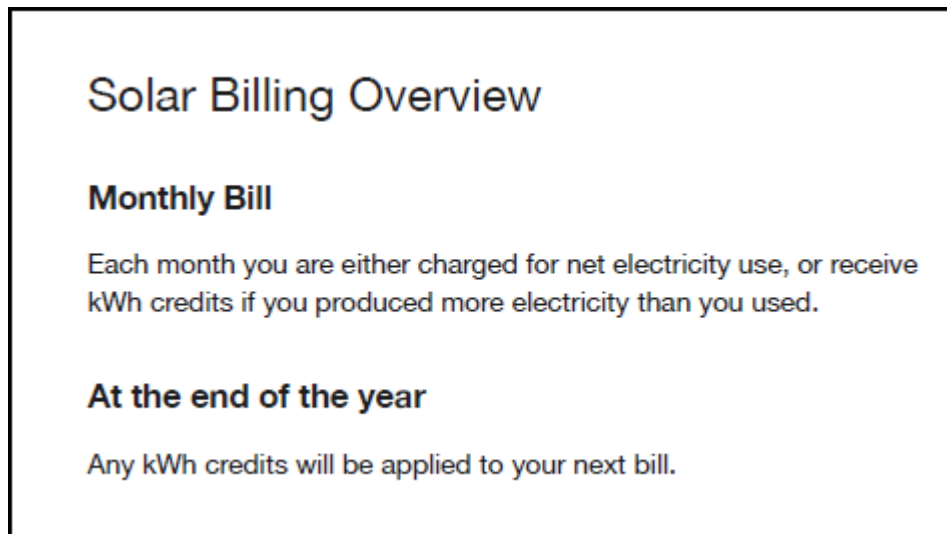
This section discusses the design for the Solar Billing Overview and the Energy/Electricity Use Overview.

### Solar Billing Overview

The Solar Billing Overview section of the Solar Welcome Experience explains how solar bills are calculated and provides solar customers with information about what they can expect to pay for electricity. The experience varies for Net Metering monthly and annual customers, and Net Billing customers.

The follow image is an example of the Solar Billing Overview for Net Metering monthly billing customers.

**Figure 2-1 Solar Billing Overview**

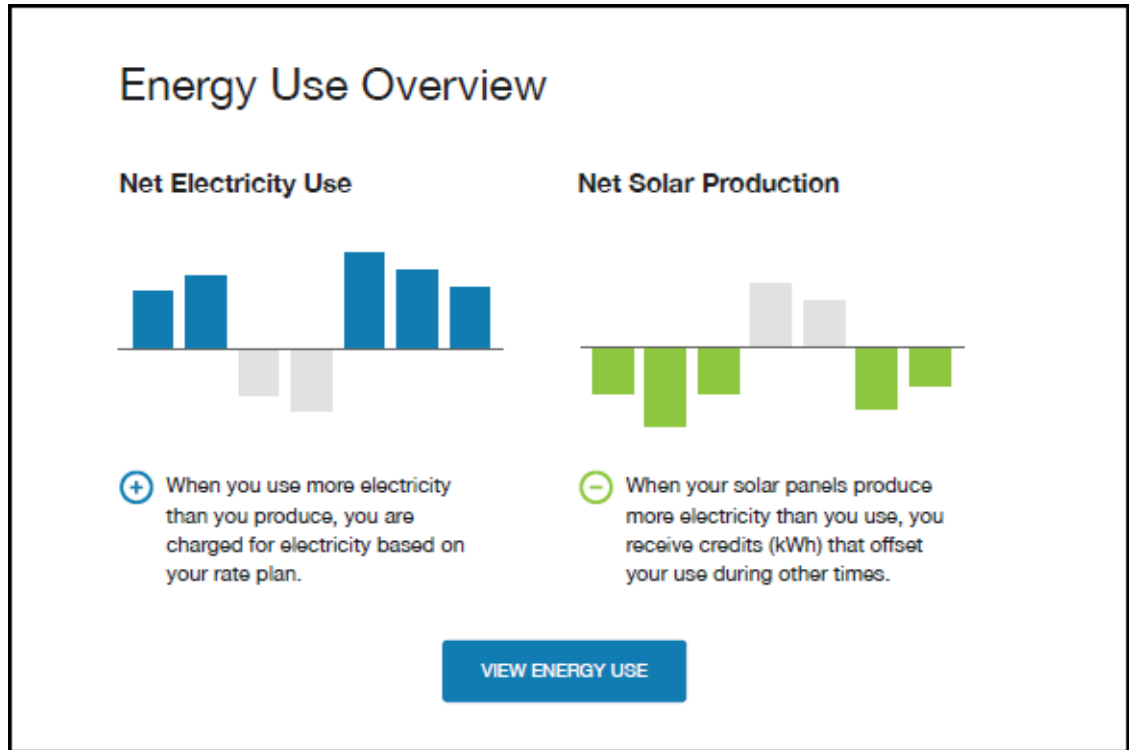


### Energy/Electricity Use Overview

The Energy Use Overview section shows the customer the differences between Net Energy Use and Net Solar Production.

The following image is an example of the Energy Use Overview for Net Metering customers.

Figure 2-2 Energy Use Overview



## Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

Table 2-1 Configuration Options

| Configuration Option  | Input Value  |
|---|--|
| <p><b>Monthly Bill Statement</b></p> <p>Use this option to tell customers that they are either charged for the electricity they use, or receive credits if they produce more electricity than they use.</p> <p><b>Default:</b></p> <p>Each month you are either charged for net electricity use, or receive kWh credits if you produced more electricity than you used.</p> | <p><b>Required</b></p> <p>Choose one of the following:</p> <ul style="list-style-type: none"> <li>Use default statements.</li> <li>Use the following statement:</li> </ul> |
| <p><b>At the end of the year</b></p> <p>Use this option to tell customers what happens to remaining credits at the end of the year.</p> <p><b>Default:</b></p> <p>Any kWh credits will be applied to your next bill.</p>  | <p><b>Required</b></p> <p>Choose one of the following:</p> <ul style="list-style-type: none"> <li>Use default statements.</li> <li>Use the following statement:</li> </ul> |

## User Experience Variations

This section discusses how the experience can vary.

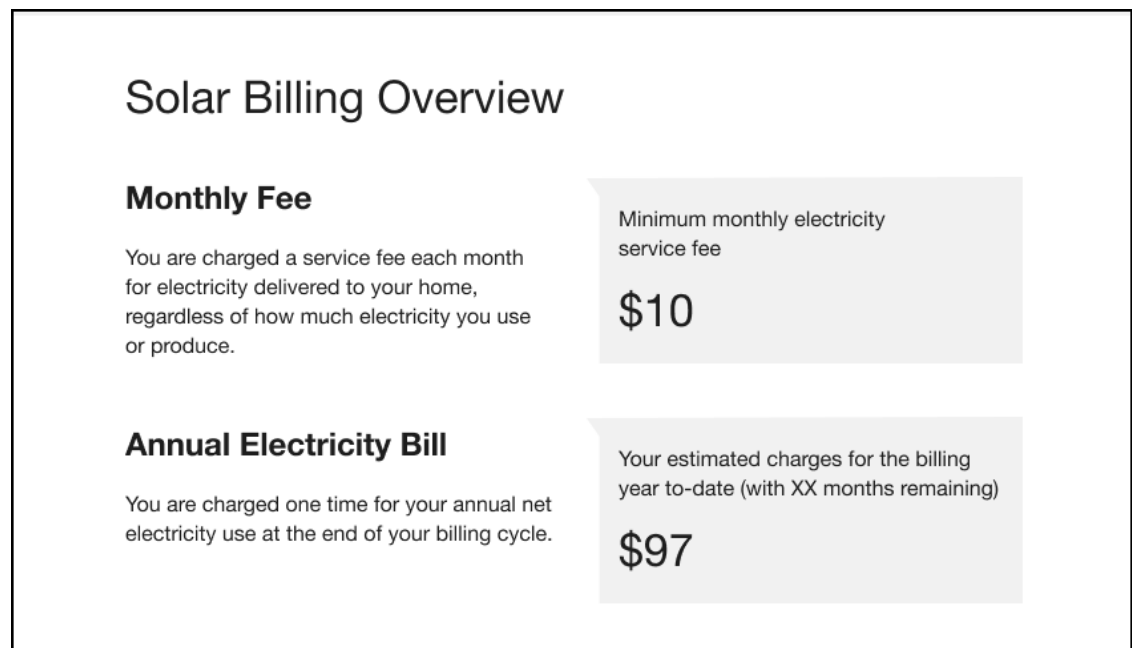
## Solar Billing Overview for Net Metering Annual Billing Customers

The Solar Billing Overview section of the Solar Welcome Experience for Net Metering annual billing customers includes the following components:

- **Monthly Fee Statement:** This statement explains how an annual solar customer's monthly solar fees are calculated.
- **Monthly Fee Box:** This box appears next to the Monthly Fee statement and shows customers their expected minimum service fee.
- **Annual Electricity Bill Statement:** This statement explains how the annual billing cycle works.
- **Estimated Annual Charges Box:** This box appears next to the Annual Electricity Bill statement and shows customers the remaining number of months and their estimated charges to-date in the current billing cycle.

The following image is an example of the Solar Billing Overview for Net Metering annual billing customers.

**Figure 2-3 Solar Billing Overview for Net Metering Annual Billing Customers**



## Solar Billing Overview for Net Billing Customers

Net Billing customers will see a Monthly Fee statement and an Annual Electricity Bill statement.

- **Monthly Fee Statement:** This statement explains that Net Billing customers are charged based on the amount of electricity they use and send back to the grid.
- **Annual Electricity Bill:** This statement explains what happens to the remaining credit balance.

## Electricity Use Overview for Net Billing Customers

Net Billing customers will see an Electricity Use Overview instead of an Energy Use Overview.

- **Electricity Purchase Statement:** This statement describes what happens when customers are using more than they are producing.
- **Electricity Sold Statement:** This statement describes what happens when customers are producing more than they are using.
- **Do Not Show This Again Checkbox:** When a customer selects this box, the Welcome Experience will not show when they open Data Browser. If this box is left unchecked, this pop-up will only appear when the customer has not visited the page in at least 90 days.
- **View Energy Use Button:** This button closes the pop-up box and shows the Data Browser.

The following image is an example of the Solar Billing Overview and the Electricity Use Overview for Net Billing customers.

Figure 2-4 Solar Billing Overview and Electricity Overview for Net Billing Customers

## Solar Billing Overview

### Monthly Fee

Each month you are charged for electricity you use from the grid and credited for electricity you send back to the grid. Any excess credits will be applied to your next monthly bill.


### Annual Electricity Bill

Any remaining credit balance will expire.

---


## Electricity Use Overview

### Electricity purchased from UtilCo



When you're using more electricity than you're producing, you purchase electricity from UtilCo. At the end of the bill period, you're charged the total amount of electricity you purchased from UtilCo.

### Electricity sold to UtilCo for credits



When you're producing more electricity than you're using, you sell the surplus back to UtilCo. At the end of the bill period, you're credited for the total amount of electricity you sold back to UtilCo, typically for a lower price per kWh than the electricity you purchased.

Do not show this again

[VIEW ENERGY USE](#)

### Welcome Experience After Initial Access (Net Metering and Net Billing Customers)

After a customer accesses the Welcome Experience the first time, they can get to the information again by clicking Learn How Solar Billing Works below the Data Browser chart. Clicking this option expands the Welcome Experience below the chart, but it is hidden for non-

solar customers. For customers who use Green Button, the Welcome Experience is collapsed by default and located on the same line with the Green Button widget. When users click the option, the Green Button widget is hidden, and when the Green Button widget is expanded, the Welcome Experience is hidden.

### Buy All/Sell All

For customers on a Buy All/Sell All solar tariff, the **Solar Billing Overview** varies as follows:

- **Monthly Billing Statement:** The statement is updated to read "Each month you are charged for electricity usage and credited for solar production. Any excess credits will be applied to your next monthly bill."
- **End of Year Statement:** The statement is updated to read "At the end of the year, any remaining credit balance will expire."

The **Energy/Electricity Use Overview** varies as follows:

- **Net Electricity Use Title and Graph:** The title is changed to "Electricity purchased from <Util Co.>" and the graph image is replaced by an image that shows a power strip on top of a graph.
- **Net Electricity Use Insight Statement:** The statement is replaced with a Buy All/Sell All statement, which reads "You are charged for the amount of energy that your home uses, regardless of whether it came from the grid or your solar panels. This is the same amount you would be paying if you didn't have solar panels."
- **Net Solar Production Title and Graph:** The title is changed to "Electricity sold to <Util Co.> for credits" and the graph image is replaced by an image of a solar panel and sun on top of a graph.
- **Net Solar Production Insight Statement:** The statement is replaced with a Buy All/Sell All statement, which reads "You are credited for the amount of energy that your solar panels produce, regardless of whether it is used by your home or sent back to the grid."

## Billing Insight

Billing Insight is designed to provide solar customers with a graphical view of their current electricity bill. Solar customers who navigate to the Electricity view in the Digital Self Service - Energy Management Data Browser for the first time will see the [Solar Welcome Experience](#). Upon subsequent visits, the customer will see the monthly Billing Insight, where they can also view previous bills.

## Design

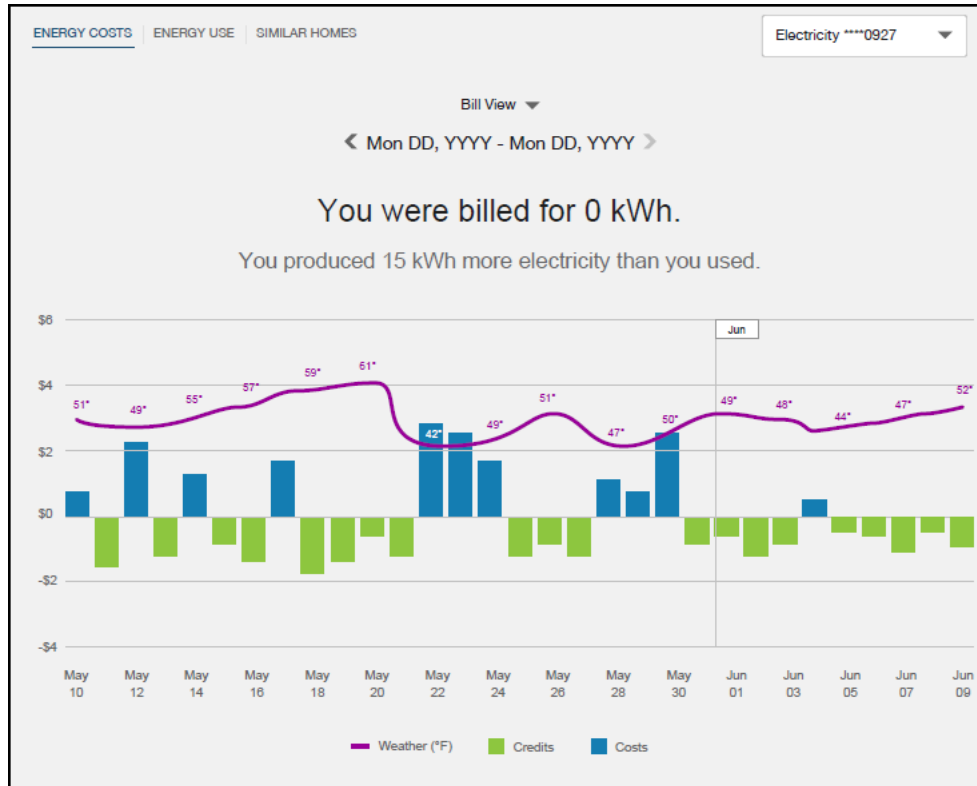
This section discusses the design for Net Metering Monthly Billing customers.

### Bill View

The Bill View section of the monthly Billing Insight shows solar customers their costs and credits for the billing cycle.

The following image is an example of the Bill View.

Figure 2-5 Bill View

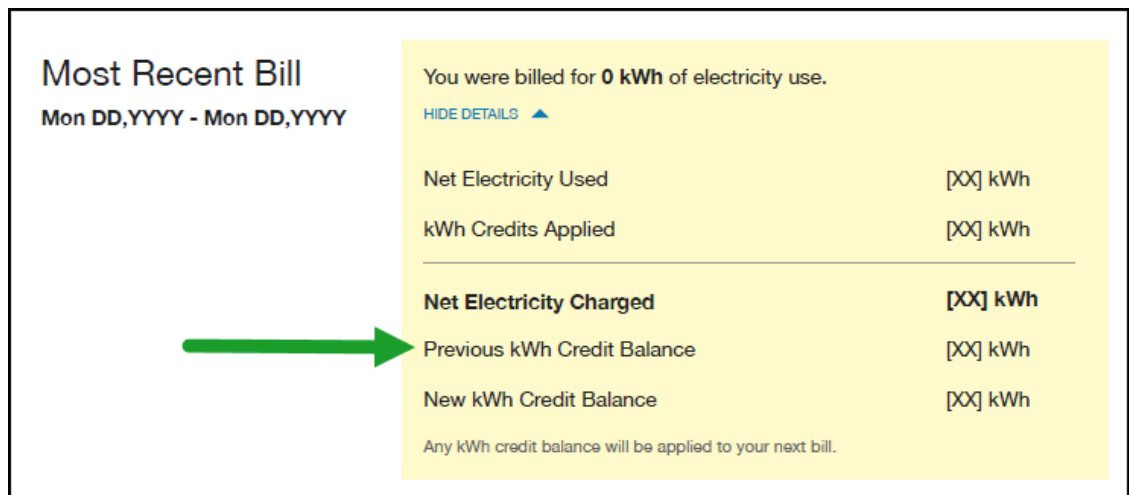


**Most Recent Bill**

The Most Recent Bill section appears below the Bill View section. By default, the Details link is not expanded.

The following image is an example of the Most Recent Bill view with the Details link expanded.

Figure 2-6 Most Recent Bill



## Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

**Table 2-2 Configuration Options**

| Configuration Option  | Input Value   |
|---|---|
| <p><b>kWh Credit Statement</b></p> <p>Use this option to tell customers how the utility handles any kWh credits that they receive during the billing period. This option appears at the bottom of the <b>Most Recent Bill</b> section.</p> <p><b>Defaults:</b></p> <ul style="list-style-type: none"> <li>When the true up date does not fall within the current billing cycle, the statement reads, "Any kWh credit balance will be applied to your next bill."</li> <li>When the true up date falls within the current billing cycle, the statement reads, "Your balance was reset on &lt;true up date&gt;, the end of your billing year. Any kWh credits this month will be applied to your next bill."</li> </ul> | <p><b>Required</b></p> <p>Choose one of the following:</p> <ul style="list-style-type: none"> <li>Use default statements.</li> <li>Use the following statement:</li> </ul>  |
| <p><b>Extra Bullet in Green Box Insight</b></p> <p>Use this option to specify whether to include an additional suggestion in the Green Box Insight, which appears below the graph for net billing customers. If you include the additional suggestion, it appears below the two default suggestions, and reads:</p> <ul style="list-style-type: none"> <li>Install a battery. Maximize the amount of solar energy for your home use. Take advantage of UtilCo rebates on home batteries.</li> </ul>   | <p><b>Required</b></p> <p>Choose one of the following:</p> <ul style="list-style-type: none"> <li>Use only the two default suggestions.</li> <li>Use an additional suggestion about installing a battery.</li> </ul> <p>If you include the additional suggestion, specify the URL to direct the customer to for battery rebate information:</p> |

## User Experience Variations

This section describes user experience variations for solar customers.

### Net Metering Annual Billing Insight

Net Metering annual billing customers are not billed, nor do they make monthly payments for net electricity usage. Instead, charges accrue during the annual billing period, and customers may receive a larger bill at the end of that period. The annual Billing Insight is designed to provide a graphical view of the customer's current electricity bill. Solar customers who navigate to the Electricity view in the Data Browser for the first time will see the Solar Welcome Experience. Upon subsequent visits, within the customer's Data Browser chart, the customer will see the annual Billing Insight, which displays information about billing cycle dates, year-to-date accrued charges, and the Current Billing Year.

The annual Billing Insight includes the following components:

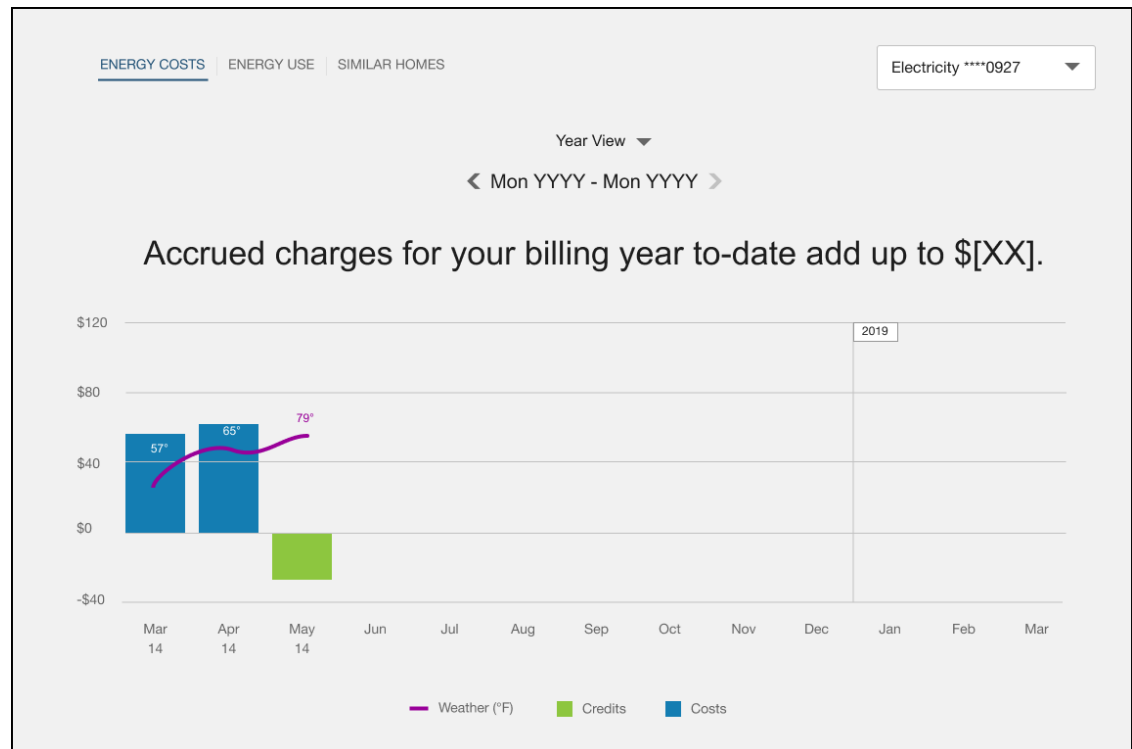
- Date Range:** The dates associated with the current annual billing period.
- Billing Statement:** This statement tells the customer what their accrued year-to-date charges are in the current billing period.



- **Monthly Billing Graph:** This graph displays the net energy costs or usage (depending on the view) that the customer incurred each month during the billing period. Credits are displayed as negative amounts in green, while costs are displayed as positive amounts in blue. A weather insight is also displayed on the chart to help customers understand the correlation between weather and their net energy costs and usage.

The following image is an example of the annual Billing Insight monthly billing graph.

**Figure 2-7 Billing Insight**

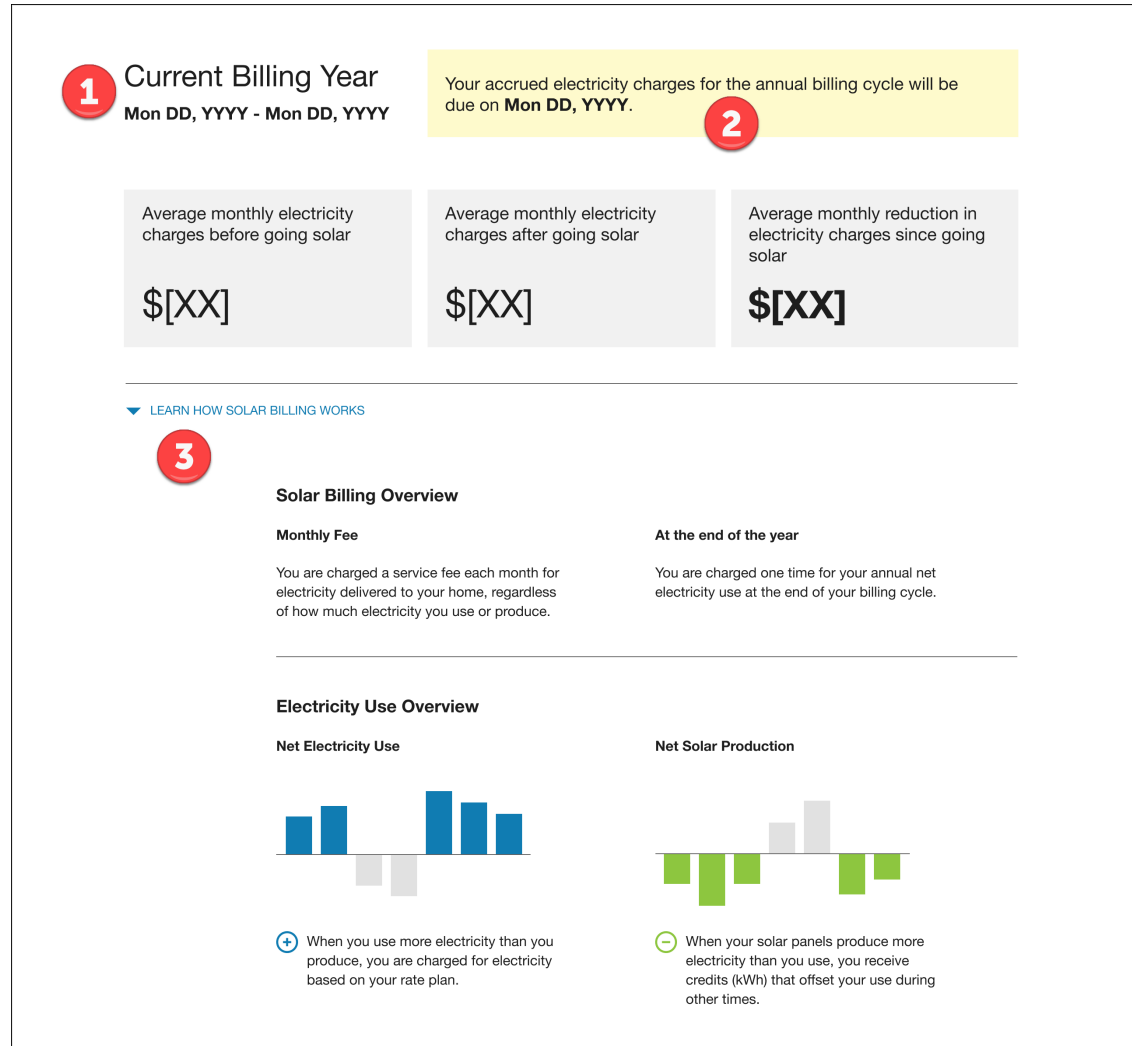


The Current Billing Year section appears below the monthly billing graph and includes:

- **Current Billing Year:** This replaces Most Recent Bill, which is what Net Metering monthly billing customers see.
- **Billing Cycle Statement:** Shows when the customer's accrued electricity charges for their annual billing cycle are due.
- **Learn How Solar Billing Works:** Expandable link showing the customer a Solar Billing Overview and an Electricity Use Overview.

The following image is an example of the Current Billing Year section for annual billing customers.

Figure 2-8 Current Billing Year



## Net Billing Customers

Net Billing customers will see their imported and exported energy from the Energy Use tab within the Data Browser. The Usage Insights will show the net bill amount for each month of the bill period instead of their usage charges and export credits. Net Billing customers will also see the Bill Breakdown section which shows the total amount of electricity they purchased and the total amount of electricity sold back to the utility.

The Usage Insight for Net Billing customers includes the following components:

- **Data Browser Graph:** This graph shows blue bars that represent the amount of electricity a customer imports, and green bars that represent the amount of electricity a customer exports.
- **Green Box Insight:** This insight gives customers recommendations for shifting energy use to save money. By default, the insight provides 2 suggestions, but it can be configured to include an additional suggestion to encourage customers to install a battery.

Bill Breakdown includes the following components:

- **Details:** This link will expand to show users the following in dollar amounts:

- Electricity purchased from the utility.
- Electricity sold to the utility for credits.
- Rollover credit balance applied (if any).
- Total electricity costs.
- **Learn How Solar Billing Works:** This link will expand to show customers the definitions of purchasing electricity and selling electricity.

The following image is an example of the Usage Insights and Bill Breakdown.

Figure 2-9 Usage Insights and Bill Breakdown



### No Modeled Rates

When the utility does not have modeled rates, the customer experience varies as follows for monthly billing true up customers:

- The Bill View and Day View of the Energy Cost chart are unavailable. Users are shown an error message when they attempt to access these views.
- On the Energy Usage chart:
  - The Most Recent Bill yellow credit box appears on all available resolutions.
  - The Bill Insight appears on Bill View if the bill resolution is available. See the No AMI Data variation for additional information.

The experience varies as follows for annual billing true up customers:

- There is no Bill View or Day View for Energy Costs.

### No AMI Data Available

When the utility does not provide AMI Data, the user experience varies as follows for monthly billing true up customers:

- Bill View and Day View are hidden for customers without AMI data. As a result, the Bill View Insight "You were billed for 0 kWh" does not appear for these customers.
- The Most Recent Bill yellow credit box appears on all other resolutions.
- The negative green bars appear if they have negative use or costs.

The experience varies as follows for annual billing true up customers:

- There is no Bill View or Day View for either energy costs or energy usage. Because the above-the-chart insight for annual billing customers is shown in Year View, this insight remains.

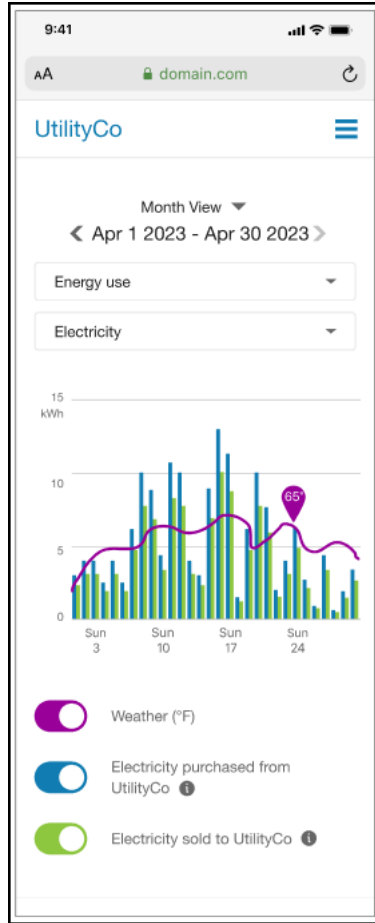
### Mobile Format

When viewing the Energy Use tab in the Data Browser on a mobile device, additional options are available below the chart that enable the user to hide or display the following options:

- Weather: Use this option to display the weather line on the chart. This option is set to OFF by default.
- Electricity purchased from the utility: Use this option to display the amount of electricity that was purchased from the utility in kWh. If the customer has both actual and estimated purchase data, both are displayed on the chart, and a legend appears below the option. This option:
  - Is set to ON by default
  - Is available only for net billing customers
- Electricity sold to the utility: Use this option to display the amount of electricity sold to the utility in kWh. This option:
  - Is set to ON by default
  - Is available only for net billing customers

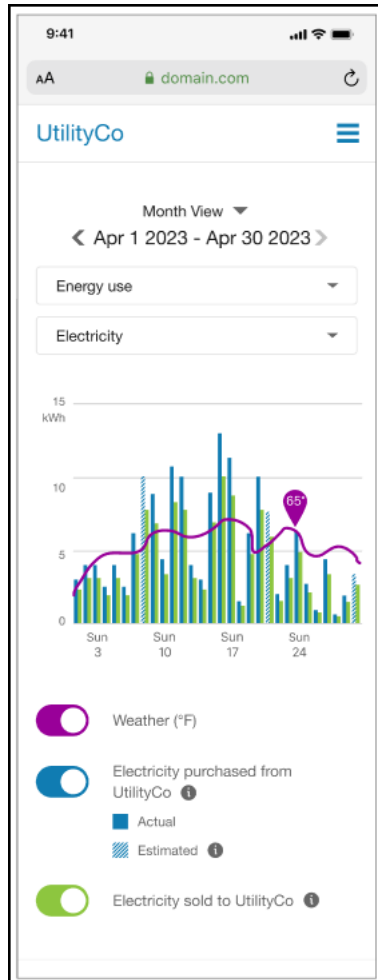
This illustration shows an example of the Energy Use tab in mobile format with no estimated reads:

**Figure 2-10 Energy Use on Mobile**



This illustration shows an example of the Energy Use tab in mobile format with estimated reads:

Figure 2-11 Energy Use Mobile with Estimated Reads



### Buy All/Sell All

For customers on a Buy All/Sell All solar tariff, the Most Recent Bill section is replaced by the Bill Breakdown section, and includes:

- **Date Range:** The dates included in the billing period
- **Energy Statement:** The statement tells the user how much electricity they used and how much they produced. For example, "You used **940 kWh** of electricity and produced **1,187 kWh** of electricity."
- **Details:** Clicking the Details option displays the following:
  - Electricity purchased from <UtilCo>
  - Electricity sold to <UtilCo> for credits
  - Rollover credit balance applied
  - Electricity costs

## Compare to Last Year View

The Compare to Last Year view gives customers a graphical overview of their monthly costs for the current year and the previous year. This view is only available to solar customers, and the utility must have Digital Self-Service Energy Management Cloud Service and Distributed Energy Resources Customer Engagement Cloud Service for their solar customers to see it.

### Design

The following image is an example of the Compare to Last Year view.

**Figure 2-12 Compare to Last Year**



## Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.



Table 2-3 Configuration Options

| Configuration Option  | Input Value   |
|---|---|
| <b>Chart Display and Order (not depicted)</b><br>Utilities can choose which graphs to display and the order in which to display them.<br><b>Default:</b><br>Compare to Last Year view is not enabled in Data Browser. | <b>Required</b><br>Choose one of the following: <ul style="list-style-type: none"> <li>• Default</li> <li>• Work with the Delivery Team to have Compare to Last Year view enabled.</li> </ul> |

## User Experience Variations

This section discusses how the experience can vary.

### Tooltip Variations

Solar customers using the Compare to Last Year view may see one or more of the following message variations on the tooltip when hovering their cursor over a bar on the chart.

- **The bill was estimated:** See DSS EM Data Browser for more information about bill estimates.
- **No data from X is available:** This message appears when only partial data from the previous year is available.
- **No data from previous year is available:** This message appears if the customer was not a customer last year.

### Variations by Solar Tariff Type

| Solar Tariff Type | Variation   |
|-------------------|---|
| Net Metering      | <p><b>Monthly Billing Customers:</b> Net Metering customers with monthly billing will see the last 12 to 13 bill periods compared to the bill periods one year prior to each billing period.</p> <p><b>Annual Billing Customers:</b> Net Metering customers with annual billing will see that the X-axis and This Year's Bills will match the X-axis and This Year's Bills displayed in the Energy Cost Year view. Therefore, a customer who is only six months into their billing year will only see six months of bills from this year and all bills from the prior year.</p> |
| Net Billing       | Net Billing customers will see the last 12 to 13 bill periods compared to the bill periods one year prior to each billing period  |

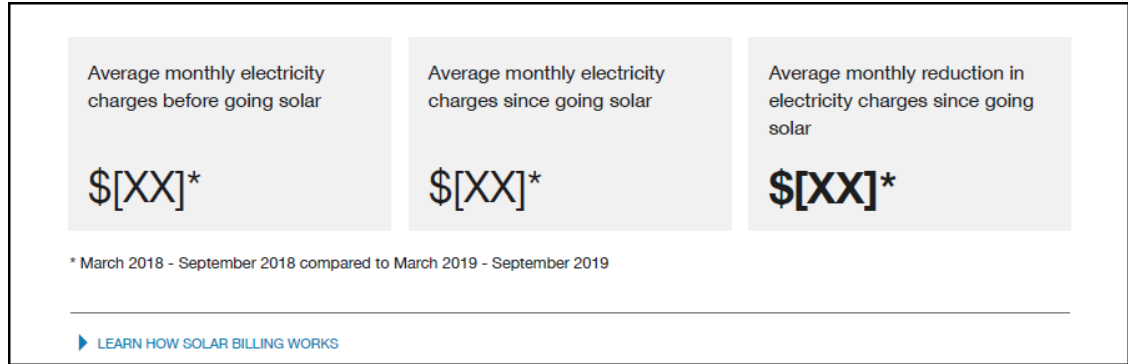
## Solar Savings Insight

The Solar Savings Insight provides a simplified view of how much money a customer has saved on their electricity bill since becoming a solar customer. Solar customers who navigate to the Electricity view in the [Data Browser](#) for the first time are shown the [Solar Welcome Experience](#). Upon subsequent visits, the customer is shown their Billing Insight followed by the Solar Savings Insight.

## Design

The following image is an example of the Solar Savings Insight.

**Figure 2-13 Solar Savings Insight**



## Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

**Table 2-4 Configuration Options**

| Configuration Option   | Input Value   |
|--|---|
| <p><b>Disclaimer Statement (Not depicted)</b></p> <p>Use this option to tell customers about additional information they need to know about the utility's solar program.</p> <p><b>Default:</b><br/>No disclaimer is included.</p> | <p><b>Required</b></p> <p>Choose one of the following:</p> <ul style="list-style-type: none"> <li>Use default of no disclaimer.</li> <li>Use the following disclaimer statement:</li> </ul> |

## User Experience Variations

This section describes user experience variations in the Solar Savings Insight.

### Inadequate History or No Savings Reduction

While there is no billing data history requirement, customers with 12 or more months of pre-solar data might have a more complete experience, because the Solar Savings Insight attempts to compare pre-solar data to post-solar data. The insight varies depending on the amount of billing data that is available. Additionally, some customers might not experience a savings when they move to a solar program.

This table describes the Solar Savings Insight user variations, where a month is equal to one billing read:

| Pre-Solar Billing History | Post-Solar Billing History | Saving Since Switching?     | User Experience   |
|---------------------------|----------------------------|-----------------------------|---|
| Less than 12 months       | One or more months         | Either saving or not saving | <p>The insight shows one box:</p> <ul style="list-style-type: none"> <li>Average monthly electricity charges since moving to solar</li> </ul> |

| Pre-Solar Billing History | Post-Solar Billing History | Saving Since Switching? | User Experience  |
|---------------------------|----------------------------|-------------------------|--|
| 12 or more months         | Less than six months       | Saving                  | The insight shows three boxes: <ul style="list-style-type: none"> <li>• Average monthly electricity charges before going solar</li> <li>• Average monthly electricity charges since going solar</li> <li>• A tip about how weather can impact your electricity charges</li> </ul>  |
| 12 or more months         | Six or more months         | Saving                  | The default experience is displayed.   |
| 12 or more months         | One or more months         | Not saving              | The insight shows three boxes: <ul style="list-style-type: none"> <li>• Average monthly electricity charges before going solar</li> <li>• Average monthly electricity charges since going solar</li> <li>• A message asking if there have been changes in energy usage that might contribute to the customer not saving since the move to solar</li> </ul> |

### Buy All/Sell All Customers

For customers on a Buy All/Sell All tariff, the `useGenCreditsVariation` configuration option should be set to true. With the option set, the Solar Savings Insight displays average production credits and total production credits.

For customers with less than a year of solar billing history, the module varies as follows:

- The first box displays the average amount of product credits since going solar
- The second box displays the total amount of credits the customer has received since going solar
- The statement below the boxes reads "Based on your monthly solar credits, starting <start date of BASA>. Your average usage charges during the same period are <\$X>."

For customers with more than one year of solar billing history, the module varies as follows:

- The first box displays the average amount of product credits during the last year
- The second box displays the total amount of credits the customer has received in the last year
- The statement below the boxes reads "Based on your monthly solar credits in the last 12 bills, starting <start date of bill period 12 months ago>. Your average usage charges during the same period are <\$X>."

## Solar Messaging in Bill Forecast

Solar customers who navigate to the Bill Forecast tool in the Digital Self Service - Energy Management Web Portal can view information about their projected bill. The Bill Forecast shows customers standard information about their bill, which includes:

- Current usage or cost so far in the billing period.
- Projected usage or cost for the billing period.
- How the current and projected usage compares to their typical usage or cost for the period, based on their past usage.

This informs customers before the end of the billing cycle if they are likely to have higher usage or cost compared to the same time period from the previous year. Customers can then take action to reduce their consumption before the billing period ends.

For solar customers, the messaging displays the projected bill in terms of net energy usage. It also includes an explanation of charges for net energy usage, where they are applicable, how they accrue, and when they are due.

Depending on whether rates are modeled, customers will see one of the following views:

- Projected bill view
- Projected usage view

For additional information about the Bill Forecast tool, see the [Oracle Utilities Opower Digital Self Service Energy Management Product Overview](#).

## Design

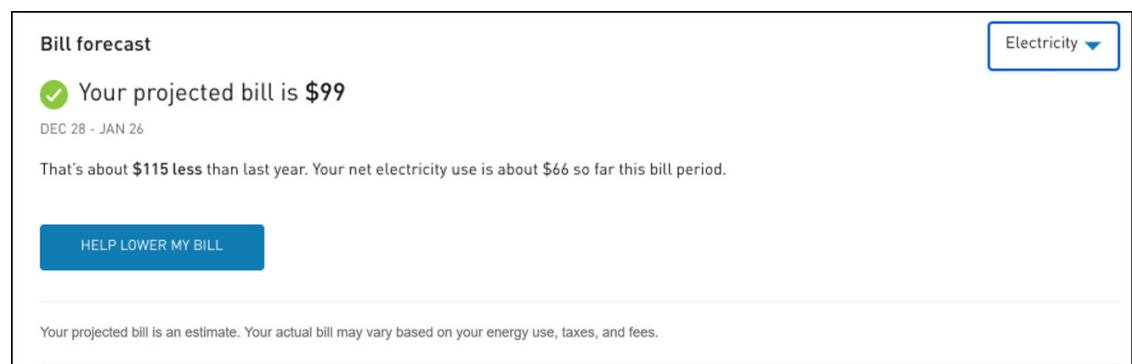
Net Metering customers will see a projected bill view and a projected usage view in the Bill Forecast.

### Projected Bill View

If rate information is available, solar customers who navigate to Bill Forecast in the Digital Self Service - Energy Management Web Portal can view their projected bill for the current bill period.

The following image is an example of the Projected Bill view for Net Metering customers.

**Figure 2-14 Projected Bill View**



### Projected Usage View

If rate information is not available, solar customers who navigate to the Bill Forecast tool in the Digital Self Service - Energy Management Web Portal can view their projected usage for the current bill period.

## Configuration Options

There are no solar-specific configuration options for this feature. For additional information about this feature, see the [Digital Self Service - Energy Management Web Portal Configuration Guide](#).

## User Experience Variations

This section describes how the Bill Forecast widget can vary for Net Metering and Net Billing customers.

### Net Metering Annual Billing Customers

For annual billing customers, the Projected Bill view and Projected Usage view vary as follows:

- **Bill Period Date Range:** The date range includes the monthly billing cycle.
- **Disclaimer Statement:** One of these statement is used, depending on whether the true-up date is available:
  - **True-up date available:** "Charges for net electricity use are not paid monthly. They accrue and will be due on [Mon DD, YYYY], the end of your billing cycle. Each month you pay only the service fee for electricity delivery."
  - **True-up date not available:** "Charges for net electricity use are not paid monthly. They accrue and will be due at the end of your billing cycle. Each month you pay only the service fee for electricity delivery."
- **Learn How Solar Billing Works link:** This link can be included at the end of the disclaimer statement, and it will direct customers to the Solar Welcome Experience in the Data Browser.

### Net Billing Customers

The Bill Forecast for Net Billing customers displays a cost view and a usage view. If cost is not available, then customers will see the Usage view (instead of dollar amounts, they will see kWh amounts). What customers see on their Projected Bill will change based on the bill period dates, the number of days into the billing period, data history, cost availability, and import/export values.

The following image is an example of the Cost view for Net Billing customers.

Figure 2-15 Cost View - Net Billing Customers

**Projected Bill**

6023031 - 760 Market St, San Francisco, CA 94103

**Bill forecasting insights**

Electricity

Both the amount of energy you purchase from and sell to UtilCo can fluctuate based on the weather and when and how your home uses energy.

DEC 28 - JAN 26

You're **15 days** into your bill period. About **14 days** remain.

So far, you've purchased **about \$53** of electricity. Last year, you purchased **\$102** of electricity from UtilCo by the end of the equivalent bill period.

So far, you've sold **about \$6** of electricity for credits. Last year, you sold **\$14** of electricity to UtilCo by the end of the equivalent bill period.

[HELP LOWER MY BILL](#)

These bill amounts do not include taxes and fees. The costs of electricity purchased from and sold to UtilCo may change over time.

Was this information helpful?

### Note

The text outlined in green will change based on the bill period dates, the number of days into the billing period, data history, cost availability, and import/export values.

The following describes the sections of the Cost view as illustrated in the above image:

- Energy Usage Statement:** A statement explaining that the amount of energy purchased and sold can fluctuate based on weather, and when and how a customer's home uses energy.
- Energy Usage Period:** These dates represent the start date of the current bill period and the projected end date.
- Days Remaining Insight:** The number of days left in the bill period.
- Energy Purchased Insight:** The amount of energy purchased so far during the current billing cycle and the amount of energy purchased last year by the end of the equivalent billing period.
- Energy Sold Insight:** The amount of energy sold so far during the current billing cycle and the amount of energy sold last year by the end of the equivalent billing period.

6. **Help Lower My Bill Button:** This link opens the Ways to Save widget.
7. **Disclaimer Statement:** A statement that explains that the amounts shown on the Bill Forecast tool do not include taxes and fees, and that the cost of electricity purchased and sold may change over time.

### Buy All/Sell All Customers

Customers on a Buy All/Sell All solar tariff will see both usage and production (when available) in their bill forecast.

In scenarios where the customer has less than a year of solar data, but more than one bill period of solar data, the comparison is made between this bill period and the previous bill period. For example:

- Last month, you used 680 kWh of electricity by the end of the bill period.
- Last month, you produced 504 kWh of electricity by the end of the bill period.

In scenarios where the customer is in their first solar billing period, with no prior solar history, the statements vary as follows:

- So far you've used about 405 kWh of electricity.
- So far you've produced about 325 kWh of electricity.

In scenarios where there is no usage yet in the current period, the statement reads as follows with no additional insights:

- Your bill forecasting insights will be ready withing the next few days.

In scenarios where the end date of the bill period is unknown, the module varies as follows:

- The date range statement is replaced with "Your bill period began Dec 15".
- The main statement reads, "You are <X> days into your bill period."

In scenarios where there is no usage, the module varies as follows:

- The usage insight statement reads, "So far, you haven't used any electricity."

In scenarios where there is no solar production, but there is usage, the module varies as follows:

- The production insight statement reads, "So far, you haven't produced any electricity."

## Solar Messaging in Bill Comparison

The Bill Comparison allows customers to compare their last bill to their previous bill, or to the corresponding bill from the same time period the previous year. Comparing bills is a useful way for customers to track their energy use and identify possible causes for an increase or decrease in their bill. Within the standard Bill Comparison experience, solar customers see messaging and information specific to solar billing and production.

The messages provide acknowledgment that the customer's electricity account is connected to a solar account. The information also helps to educate customers about solar billing, easily directing them to relevant information, such as the [solar features on the Data Browser](#), when they access the Bill Comparison tool.

## Design

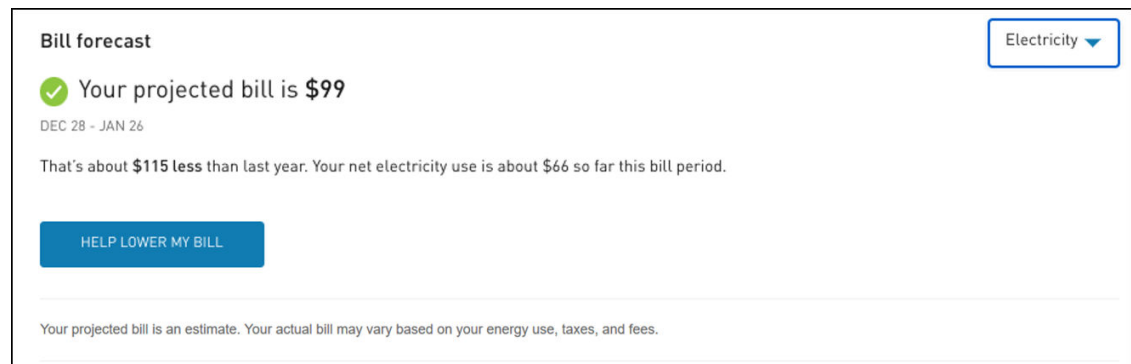
Net Metering customers will see a projected bill view and a projected usage view in the Bill Forecast.

### Projected Bill View

If rate information is available, solar customers who navigate to Bill Forecast in the Digital Self Service - Energy Management Web Portal can view their projected bill for the current bill period.

The following image is an example of the Projected Bill view for Net Metering customers.

**Figure 2-16 Projected Bill View**



### Projected Usage View

If rate information is not available, solar customers who navigate to the Bill Forecast tool in the Digital Self Service - Energy Management Web Portal can view their projected usage for the current bill period.

## Configuration Options

There are no solar-specific configuration options for this feature. For additional information about this feature, see the [Digital Self Service - Energy Management Web Portal Configuration Guide](#).

## User Experience Variations

This section describes how the Bill Comparison widget varies for Net Metering annual billing customers and Net Billing customers.

### Net Metering Annual Billing Customers

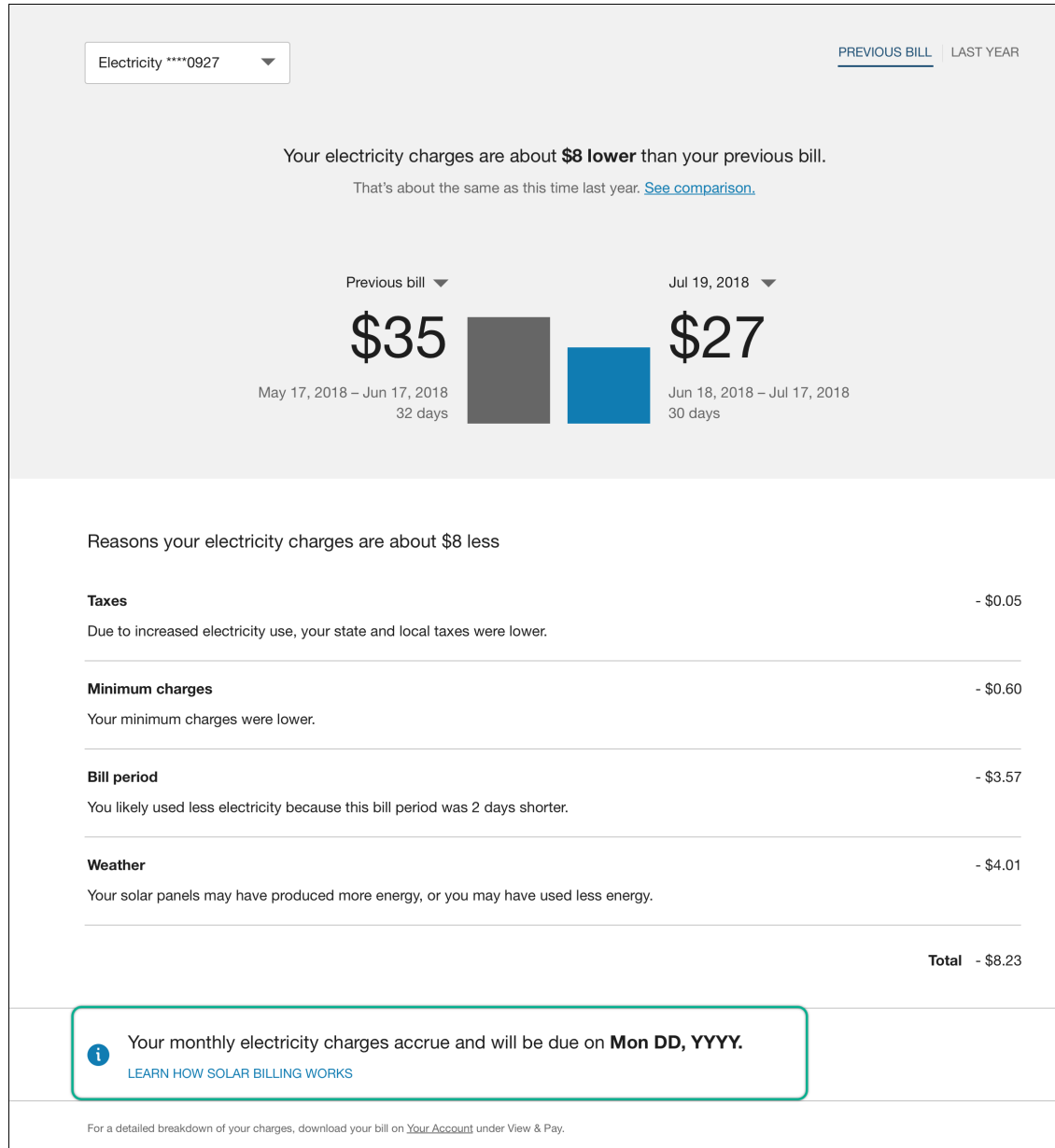
For Net Metering solar customers who are billed annually for net electricity usage, the View Your Energy Use link is removed from the bottom of the widget, and is replaced with the following:

- **Due Date Statement:** Your monthly electricity charges accrue and will be due on Mon DD, YYYY.
- **Learn How Solar Billing Works link:** When a customer clicks this link, they are taken to the Solar Welcome Experience in the Data Browser.

The following image is an example of the Bill Comparison widget for Net Metering annual billing customers that highlights the Due Date statement.



Figure 2-17 Bill Comparison - Annual

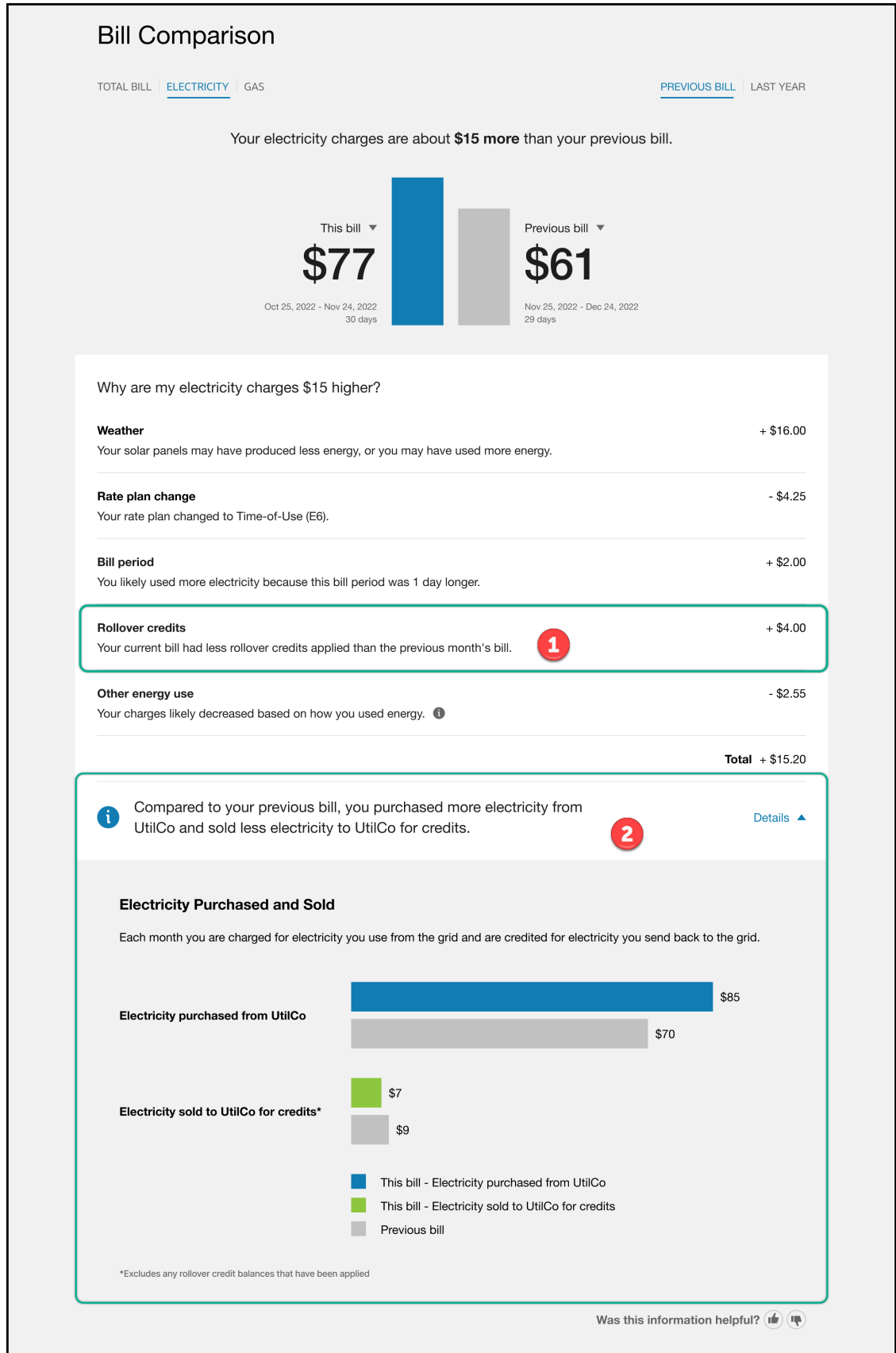


### Net Billing Customers

For solar Net Billing customers, the View Your Energy Use link and the Learn How Solar Billing Works link are removed from the bottom of the widget and the following sections are added:

1. **Rollover Credits Statement:** A statement indicating the customer's current bill has more credits or less credits applied compared to their last bill.
2. **Comparison Statement:** A statement that tells the customer if they purchased more or less electricity and sold more or less electricity compared to their previous bill. Customers can click Details to expand a new section that shows bar graphs for Electricity Purchased for the current and previous bill, and Electricity Sold for the current and previous bill.

Figure 2-18 Bill Comparison - Net Billing



### Buy All/Sell All Customers

For Buy All/Sell All customers, the **View Your Energy Use** link and the **Learn How Solar Billing Works** link are removed from the bottom of the widget and the following sections are added:

- 1. Rollover Credits Statement:** A statement indicating the customer's current bill has more credits or less credits applied compared to their last bill, or to last year. Variations include:
  - Your current bill had more rollover credits applied than the previous month's bill.
  - Your current bill had less rollover credits applied than the previous month's bill.
  - Your current bill had more rollover credits applied than this time last year.
  - Your current bill had less rollover credits applied than this time last year.
- 2. Comparison Statement:** A statement that tells the customer if they purchased more or less electricity and sold more or less electricity compared to their previous bill or to last year's bill. For example:
  - Compared to your previous bill, you purchased more electricity from UtilCo and sold less electricity to UtilCo for credits.
  - Compared to this time last year, you purchased less electricity from UtilCo and sold more electricity to UtilCo for credits.
- 3. Customers can click **Details** to expand a new section that shows bar graphs for **Electricity Purchased** for the current and previous bill, and **Electricity Sold** for the current and previous bill.**
- 4. Comparison Period:** The time period being compared can change between comparing the current bill to the previous bill, or to the bill from the equivalent period last year. This is determined based on how much solar data is available.

## Configuration of Solar Update Notifications

Solar Update Notifications are email communications that walk new solar customers through their first year of having solar panels. Customers receive the following emails:

- [Email 1: Welcome to Solar](#)
- [Email 2: Understand Your First Solar Bill](#)
- [Email 3: How's Your Solar Data Trending?](#)
- [Email 4: Was Going Solar the Right Decision?](#)
- [Email 5: Build Your Solar Expertise](#)
- [Email 6: Your First Solar Year In Review](#)

This section discusses the design and configuration of Solar Update Notifications, and discusses how the messages can vary.

### Email 1: Welcome to Solar

The first email solar customers receive is the Welcome to Solar email, which is sent shortly after a customer connects to the solar program. This email provides positive messaging, congratulating the customer on making the move to a solar energy program.

The message also educates the customer by providing them with information about common myths associated with solar energy programs, and identifying solar-specific items they will see

when they receive their first solar bill. Providing this information early in the customer's solar journey helps to set realistic expectations about how solar panels can impact their utility bill, and clarifies what their solar billing experience will look like.

The Welcome to Solar email contains these modules:

- Solar Email Header
- Solar 1 - Welcome
- Solar 1 - Myths
- Solar 1 - Get Ready for First Bill
- Solar Email Footer

## Email 1 - Design and Configuration

This section discusses the design of each module included in the email, and provides details on any available configuration options.

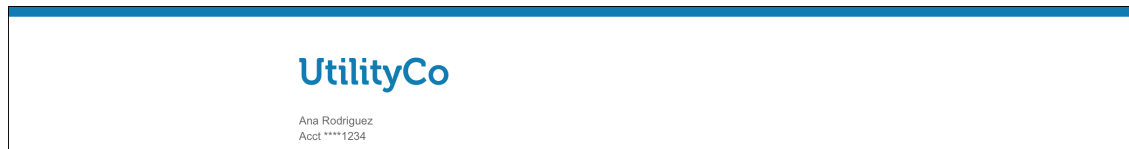
### Solar Email Header

This section discusses the design and configuration options for the Solar Email Header module.

#### Design

The email header introduces the reader to the email and displays the utility's logo and the customer's account number in the appropriate format.

**Figure 2-19 Solar Email Header**



#### Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

**Table 2-5 Configuration Options**

| Configuration Option   | Input Value   |
|--|---|
| <b>Company Logo</b><br>The RGB and CMYK versions of the utility logo as .ai files.<br>Example: UtilityCo_Logo_RGB.ai | <b>Required</b><br>Provide the utility logo in the <a href="#">Oracle Utilities Opower Platform Configuration Guide</a> . |

**Table 2-5 (Cont.) Configuration Options**

| Configuration Option   | Input Value  |
|--|--|
| <p><b>Account Number</b><br/>An example of how the customer account number is formatted on the bill. In your example, indicate how many digits should be displayed (in the example below, four digits are displayed).<br/>Example: 12-34XX-XXX</p> | <p><b>Required</b><br/>Provide the utility logo in the <a href="#">Oracle Utilities Opower Platform Configuration Guide</a>.</p> |

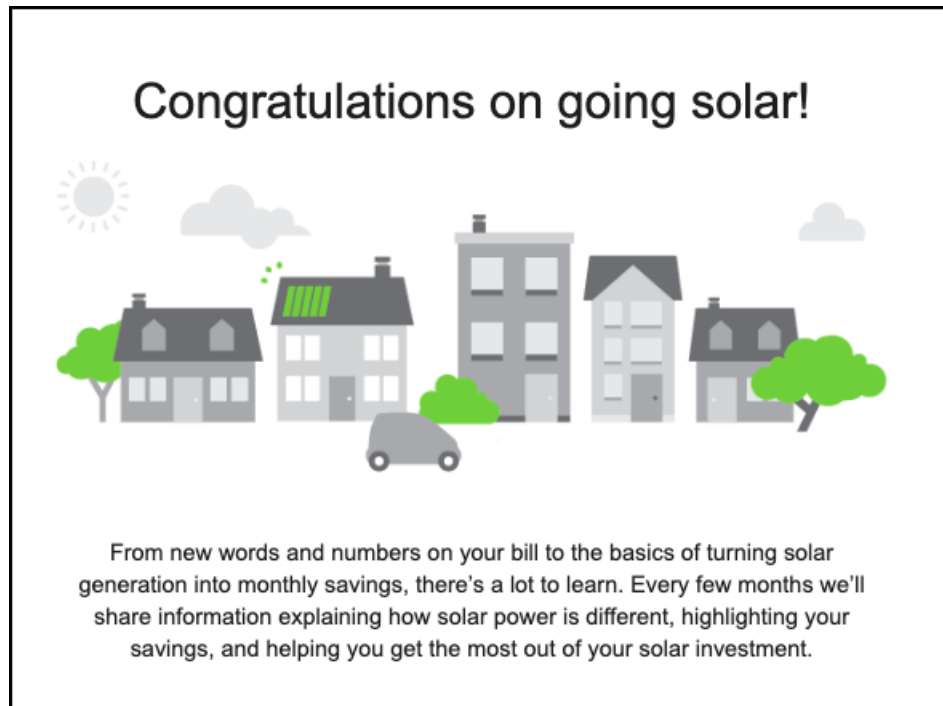
## Solar 1 Welcome Module

This section discusses the design and configuration options for the Solar 1 - Welcome module.

### Design

This module congratulates customers on going solar and welcomes them to the Solar Update Notification program.

**Figure 2-20 Welcome**



### Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

| Configuration Option  | Input Value  |
|---|--|
| <b>Welcome Image</b><br>The welcome image can be configured to use the utility's branding and colors. | <b>Optional</b><br>Choose one of the following: <ul style="list-style-type: none"> <li>• Use the default image.</li> <li>• Use an image with utility branding and colors.</li> </ul> |

## Solar 1 Myths Module


This section discusses the design and configuration options for the Solar Email Header module.

### Design

This module discusses common myths about solar programs, and explains them so that the customer has a better understanding of how solar programs work. Dispelling common myths early in a solar customer's journey can help to improve understanding and customer satisfaction. The section can include up to five myths.


**Figure 2-21 Myths**

**Do you know these common myths about solar?**




**Myth #1**  
**Going solar means no more utility bills.**

Your solar panels may not produce all the power you need each month, which means you'll still be charged for some electricity.



**Myth #2**  
**My utility is going to pay me money every month.**

Solar panel production varies based on weather, season, and other factors, so you won't always produce more power than you use. When you do, we'll apply your excess kilowatt hours (kWh) to future bills.



**Myth #3**  
**Now that I have solar panels I'm "off the grid."**

Your solar panels are still connected to the TEST grid, which lets you draw power when your panels aren't producing and send excess power back to the grid when they are.

### Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

**Table 2-6 Configuration Options**

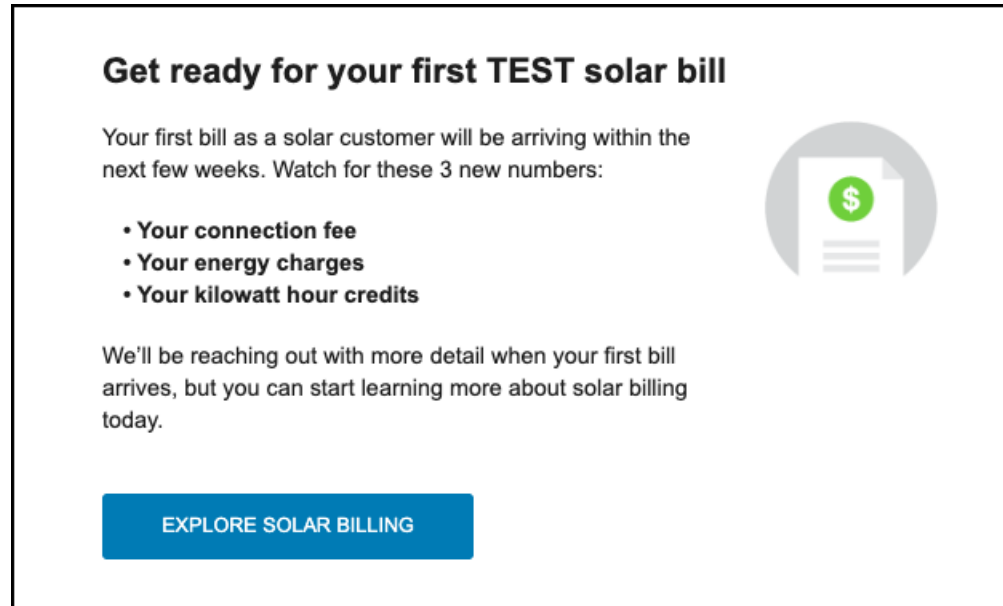
| Configuration Option   | Input Value   |
|--|---|
| <b>Number of Myths</b><br>You can include up to five myths in the email. However, three is the recommended number of myths, to avoid information overload. | <b>Required</b><br>Specify the number of myths to include.  |
| <b>Myth Images</b><br>The images associated with each myth can be configured to use the utility's branding and colors.                                     | <b>Optional</b><br>Choose one of the following: <ul style="list-style-type: none"> <li>• Use the default images.</li> <li>• Use images with utility branding and colors.</li> </ul> |

## Solar 1 Get Ready for First Bill Module

This section discusses the design and configuration options for the Solar Email Header module.

### Design

This module prepares customers for the new information they will see when they receive their first solar bill. This section also provides customers with access to the utility's solar billing page.

**Figure 2-22 Get Ready for First Bill**

### Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

**Table 2-7 Configuration Options**

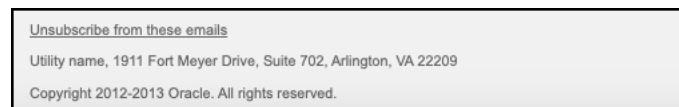
| Configuration Option  | Input Value   |
|---|---|
| <b>Solar Billing Image</b><br>The image can be configured to use the utility's branding and colors.   | <b>Optional</b><br>Choose one of the following: <ul style="list-style-type: none"> <li>Use the default images.</li> <li>Use images with utility branding and colors.</li> </ul> |
| <b>Bullet Points</b><br>You can include up to five bullet points. The maximum length for each bullet point is 45 characters, and the text should not break across multiple lines. | <b>Required</b><br>Specify the text used for the bullet points.   |
| <b>Explore Solar Billing Button Text</b><br>Use this button to direct customers to additional solar billing information.<br>Default: Explore Solar Billing                        | <b>Optional</b><br>Choose one of the following: <ul style="list-style-type: none"> <li>Use the default text.</li> <li>Use the following text:</li> </ul>                        |
| <b>Explore Solar Billing Button URL</b><br>Use this button to direct customers to additional solar billing information.   | <b>Required</b><br>Specify the URL of the page you want to direct customers to.   |

## Solar Email Footer

This section discusses the design and configuration options for the Solar Email Header module.

### Design

The email footer includes required information, such as the utility's address, and links to unsubscribe from emails and manage customer preferences. The footer also provides utilities with a space to include additional legal information, as needed.

**Figure 2-23 Solar Email Footer**

### Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

**Table 2-8 Configuration Options**

| Configuration Option   | Input Value                                       |
|--|---|
| <b>Utility Address</b><br>The address must appear in the email due to CAN-SPAM regulations in the US and similar regulations abroad. | <b>Required</b><br>Provide the utility's address. |



**Table 2-8 (Cont.) Configuration Options**

| Configuration Option  | Input Value  |
|---|--|
| <b>Legal Language</b><br>This statement can contain legal information, including copyright information, and any additional information the utility wants to include in the email message. | <b>Optional</b><br>Provide any legal language that must appear in the email. |

## Email 1 - User Experience Variations

This section discusses how the email can vary.

### Newcomer Experience

For customers with less than 12 months of pre-solar billing data, the statement in the Solar 1 - Welcome module reads, "From new words and numbers on your bill to the basics of turning solar generation into monthly savings, there's a lot to learn. Every few months we'll share information explaining how solar power is different, tracking your costs, and helping you get the most out of your solar investment."

Note that the words "highlighting your savings" are replaced with "tracking your costs".

## Email 2: Understand Your First Solar Bill

The second email solar customers receive is the Understand Your First Solar Bill email. This message arrives after Opower receives the first billed read in the data file, but before the customer receives their first solar utility bill.

This email educates customers about what they will see on their bill, and explains how the amounts are calculated. The email includes an image of the utility's standard solar bill, and calls out up to five key areas that are of importance to solar customers. The message also provides detailed information about each of the specified areas on the bill.

The Understand Your First Solar Bill email contains these modules:

- Solar Email Header
- Solar 2 - Key Numbers on Bill
- Solar Email Footer

## Email 2 - Design and Configuration

This section discusses the design of each module included in the email, and provides details on any available configuration options.

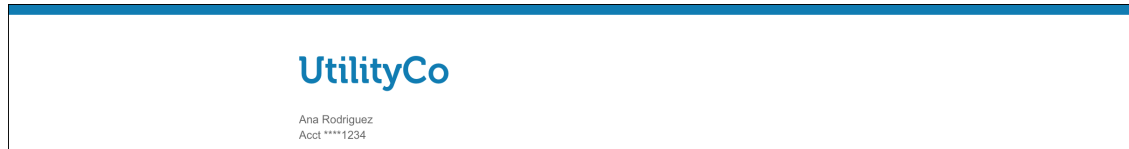
### Solar Email Header

This section discusses the design and configuration options for the Solar Email Header module.

## Design

The email header introduces the reader to the email and displays the utility's logo and the customer's account number in the appropriate format.

**Figure 2-24 Solar Email Header**



## Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

**Table 2-9 Configuration Options**

| Configuration Option   | Input Value   |
|--|---|
| <p><b>Company Logo</b></p> <p>The RGB and CMYK versions of the utility logo as .ai files.</p> <p>Example: UtilityCo_Logo_RGB.ai</p>  | <p><b>Required</b></p> <p>Provide the utility logo in the <a href="#">Oracle Utilities Opower Platform Configuration Guide</a>.</p> |
| <p><b>Account Number</b></p> <p>An example of how the customer account number is formatted on the bill. In your example, indicate how many digits should be displayed (in the example below, four digits are displayed).</p> <p>Example: 12-34XX-XXX</p> | <p><b>Required</b></p> <p>Provide the utility logo in the <a href="#">Oracle Utilities Opower Platform Configuration Guide</a>.</p> |

## Solar 2 Key Numbers on Bill Module

This section discusses the design and configuration options for the Solar 2 Key Numbers on Bill module.

### Design

This module shows an example solar bill from the utility, and calls out the important information customers should be aware of before they receive their first bill.

Figure 2-25 Key Numbers on Bill

Your first TEST solar bill is on its way

Zero in on these 3 important numbers first

The screenshot shows a solar bill with the following items:

| Item                  | Amount |
|-----------------------|--------|
| ELECTRIC DELIVERY     | \$1.00 |
| TAXES & FEES          | \$3.00 |
| TOTAL                 | \$4.00 |
| CREDITS               | -.44   |
| TOTAL ELECTRIC BILLED | \$6.00 |
| TOTAL AMOUNT DUE      | \$6.00 |

Other ways to pay: Online, In-person, Pay-by-phone

your bill online, by phone or by mail.

TOTAL AMOUNT DUE: \$6.00

- 1 This is a connection fee you pay each month regardless of how much energy your solar panels produce.
- 2 This is what you owe for electricity when you use more than your solar panels produce.
- 3 These are the credits you earn when your solar panels produce more electricity than you use.

LEARN MORE ABOUT SOLAR BILLING

### Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

| Configuration Option   | Input Value                                 |
|--|---|
| <b>Heading</b><br>The utility's name must be identified in the heading, which reads, "Your first <Utility Name> solar bill is on its way". | <b>Required</b><br>Specify the Utility Name |

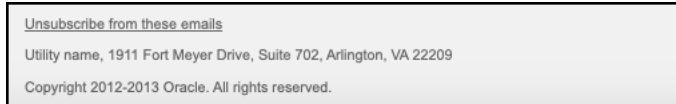
| Configuration Option   | Input Value   |
|--|---|
| <p><b>Bill Image</b></p> <p>The utility must provide a bill sample to Oracle, who will then create the custom graphic. The numbered callouts on the bill should use the same colors as other graphic callouts in the emails, and the numbers must correspond to the numbered list that appears below the image.</p> <p>Additionally, these numbers should correspond to the bullet points included in the Solar 1 - Get Ready For First Bill module in the first solar email.</p>  | <p><b>Required</b></p> <p>Provide an image of the bill.</p>   |
| <p><b>List of Items</b></p> <p>The list can include up to five items, beginning with a numbered graphic that can be configured to match the utility's branding and colors. The number of items must correspond to the numbers in the bill image, and also with the bullet points included in the Get Ready For Your First Solar Bill section in the first solar email.</p> <p>The wording in these items is configurable, but it is recommended to use the provided wording, if it applies. Each item should not exceed two lines, or 96 characters.</p> | <p><b>Required</b></p> <p>Specify the wording to use.</p>   |
| <p><b>Learn More About Solar Billing Button Text</b></p> <p>Use this button to direct customers to additional solar billing information.</p> <p>Default: Learn More About Solar Billing</p>  | <p><b>Optional</b></p> <p>Choose one of the following:</p> <ul style="list-style-type: none"> <li>• Use the default text.</li> <li>• Use the following text:</li> </ul> |
| <p><b>Learn More About Solar Billing Button URL</b></p> <p>Use this button to direct customers to additional solar billing information.</p> <p>Default: Direct users to the Data Browser.</p>  | <p><b>Required</b></p> <p>Specify the URL of the page you want to direct customers to.</p>  |

## Solar Email Footer

This section discusses the design and configuration options for the Solar Email Header module.

### Design

The email footer includes required information, such as the utility's address, and links to unsubscribe from emails and manage customer preferences. The footer also provides utilities with a space to include additional legal information, as needed.

**Figure 2-26 Solar Email Footer****Configuration Options**

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

**Table 2-10 Configuration Options**

| Configuration Option  | Input Value  |
|---|--|
| <b>Utility Address</b><br>The address must appear in the email due to CAN-SPAM regulations in the US and similar regulations abroad.  | <b>Required</b><br>Provide the utility's address.                            |
| <b>Legal Language</b><br>This statement can contain legal information, including copyright information, and any additional information the utility wants to include in the email message. | <b>Optional</b><br>Provide any legal language that must appear in the email. |

## Email 3: How's Your Solar Data Trending?

The third email solar customers receive is the How's Your Solar Data Trending email. This message arrives approximately three months after a customer begins their solar program, and is triggered after Opower receives the third billed read in the data file.

The content of the message varies, depending on whether the customer has saved money since switching to solar. The message displays the average monthly charges before and after moving to solar. If the customer is not experiencing a savings since switching to solar, the message includes some information about why they might not be seeing the savings they were expecting. The message also clarifies the difference between gross and net production, and directs users to additional resources that can help explain the difference.

The How's Your Solar Data Trending email contains these modules:

- Solar Email Header
- Solar 3 - Tracker
- Solar 3 - Tracker Message for Non Savers (Included only when the average monthly cost has not decreased since switching to solar.)
- Solar 3 - Production Numbers Don't Match
- Solar Email Footer

## Email 3 - Design and Configuration

This section discusses the design of each module included in the email, and provides details on any available configuration options.

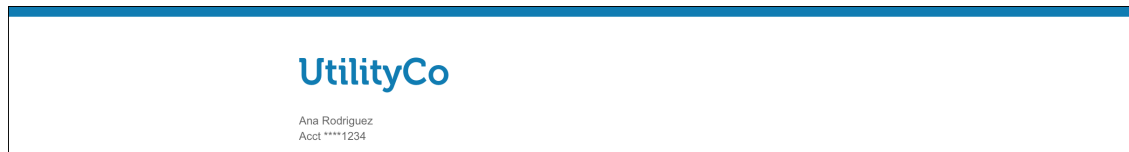
## Solar Email Header

This section discusses the design and configuration options for the Solar Email Header module.

### Design

The email header introduces the reader to the email and displays the utility's logo and the customer's account number in the appropriate format.

**Figure 2-27 Solar Email Header**



### Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

**Table 2-11 Configuration Options**

| Configuration Option   | Input Value   |
|--|---|
| <p><b>Company Logo</b></p> <p>The RGB and CMYK versions of the utility logo as .ai files.</p> <p>Example: UtilityCo_Logo_RGB.ai</p>  | <p><b>Required</b></p> <p>Provide the utility logo in the <a href="#">Oracle Utilities Opower Platform Configuration Guide</a>.</p> |
| <p><b>Account Number</b></p> <p>An example of how the customer account number is formatted on the bill. In your example, indicate how many digits should be displayed (in the example below, four digits are displayed).</p> <p>Example: 12-34XX-XXX</p> | <p><b>Required</b></p> <p>Provide the utility logo in the <a href="#">Oracle Utilities Opower Platform Configuration Guide</a>.</p> |

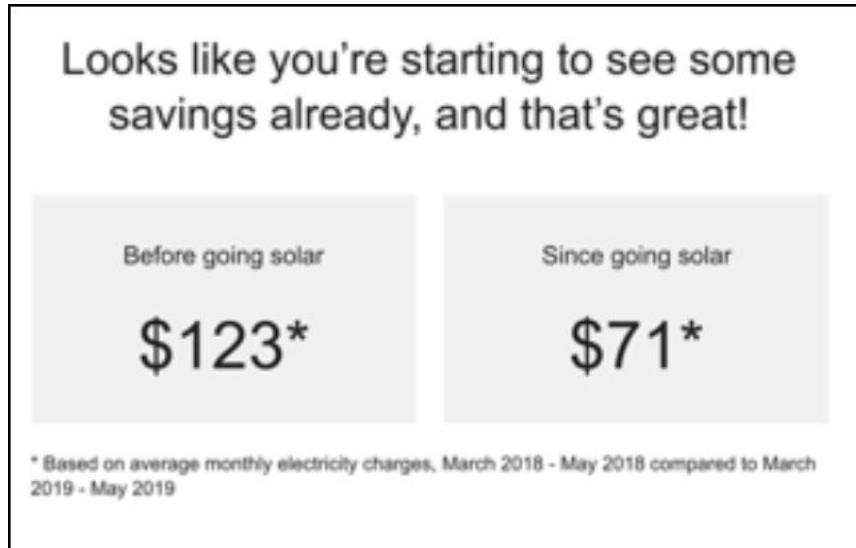
## Solar 3 Tracker Module

This section discusses the design and configuration options for the Solar 3 Tracker module.

### Design

This module provides customers with an at-a-glance view of how much they are saving since moving to their solar program.

Figure 2-28 Solar 3 Tracker



**Configuration Options**

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

| Configuration Option  | Input Value   |
|---|---|
| <p><b>Heading</b></p> <p>You can modify the default heading text. The defaults for customers who are savers and non-savers are:</p> <ul style="list-style-type: none"> <li>Saver: Looks like you're starting to see some savings already, and that's great!</li> <li>Non-saver: Looks like you aren't seeing the savings you expected.</li> </ul>   | <p><b>Required</b></p> <p>Choose one of these options:</p> <ul style="list-style-type: none"> <li>Use the default headings.</li> <li>Use the following headings:</li> </ul>   |
| <p><b>Disclaimer (Not Depicted)</b></p> <p>Utilities can use a disclaimer at the bottom of the module to provide any additional detail customers need to know.</p> <p><b>Default text when set to display:</b><br/>                     "These charges do not include natural gas charges; electricity charges from third-party solar suppliers; or the cost of ownership, maintenance, and insurance of solar equipment."<br/>                     A configurable URL can also be added to the disclaimer as needed.</p> | <p><b>Optional</b></p> <p>Choose one of these options:</p> <ul style="list-style-type: none"> <li>Do not include a disclaimer.</li> <li>Use the default disclaimer.</li> <li>Use the following disclaimer:</li> </ul> |

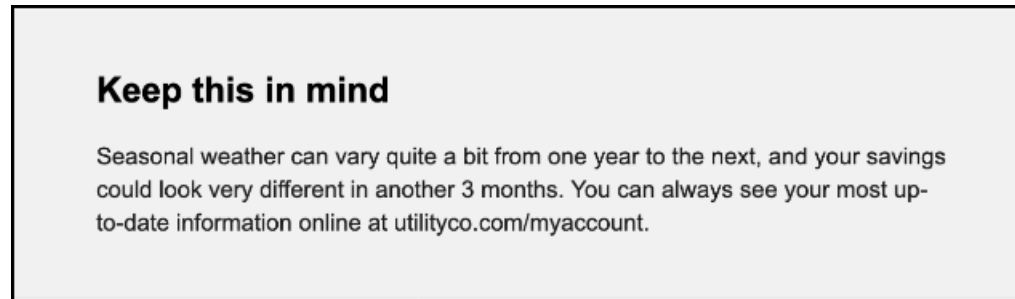
**Solar 3 Tracker Non Saver Module**

This section discusses the design and configuration options for the Solar 3 Tracker Non Saver module.

## Design

This module appears in the email only when the customer has not experienced savings since moving to solar. The wording reminds customers that seasonal weather can impact their savings.

**Figure 2-29 Solar 3 Tracker for Non-Savers**



## Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

| Configuration Option   | Input Value   |
|--|---|
| <b>Utility URL</b><br>The statement explains to users how seasonal weather can impact their bill, and provides a link to additional resources. | <b>Required</b><br>Specify the URL you want to direct customers to. |

## Solar 3 Production Numbers Don't Match Module

This section discusses the design and configuration options for the Solar 3 Production Numbers Don't Match module.

## Design


This module explains the difference between the numbers solar providers share with their customers and what the customer will see on their solar utility bill.




Figure 2-30 Production Numbers Don't Match

### Confused about your solar production numbers?

Solar customers like you often wonder why solar providers show a different production number than we show on your bill. Here's the simple difference:



**Your Solar Provider**  
Shows the total kWh your solar panels produced (gross production)



**UtilityCo**  
Shows the total kWh your solar panels produced minus what you used (net production)

[LEARN MORE ABOUT THE DIFFERENCE](#)

### Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

| Configuration Option  | Input Value  |
|---|--|
| <p><b>Solar Provider Graphic</b><br/>This graphic can be configured to use the utility's branding and colors.</p>   | <p><b>Optional</b><br/>Choose one of the following:</p> <ul style="list-style-type: none"> <li>• Use the default graphic.</li> <li>• Use a utility-branded graphic.</li> </ul> |
| <p><b>Utility Graphic</b><br/>This graphic can be configured to use the utility's branding and colors.</p>  | <p><b>Optional</b><br/>Choose one of the following:</p> <ul style="list-style-type: none"> <li>• Use the default graphic.</li> <li>• Use a utility-branded graphic.</li> </ul> |
| <p><b>Utility Name Subheading</b><br/>Below the utility graphic, the subheading that displays the utility's name appears. The default is "UtilityCo".</p>                           | <p><b>Required</b><br/>Specify the name of the utility company.</p>  |
| <p><b>Learn More About The Difference Button Text</b><br/>Use this button to direct customers to additional solar billing information. Default: Learn More About the Difference</p> | <p><b>Optional</b><br/>Choose one of the following:</p> <ul style="list-style-type: none"> <li>• Use the default text.</li> <li>• Use the following text:</li> </ul>           |

| Configuration Option  | Input Value   |
|---|---|
| <b>Learn More About The Difference Button URL</b><br>Use this button to direct customers to additional solar billing information. | <b>Required</b><br>Specify the URL of the page you want to direct customers to. |

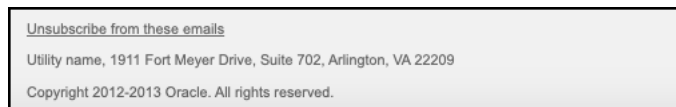
## Solar Email Footer

This section discusses the design and configuration options for the Solar Email Header module.

### Design

The email footer includes required information, such as the utility's address, and links to unsubscribe from emails and manage customer preferences. The footer also provides utilities with a space to include additional legal information, as needed.

**Figure 2-31 Solar Email Footer**



### Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

**Table 2-12 Configuration Options**

| Configuration Option  | Input Value  |
|---|--|
| <b>Utility Address</b><br>The address must appear in the email due to CAN-SPAM regulations in the US and similar regulations abroad.  | <b>Required</b><br>Provide the utility's address.                            |
| <b>Legal Language</b><br>This statement can contain legal information, including copyright information, and any additional information the utility wants to include in the email message. | <b>Optional</b><br>Provide any legal language that must appear in the email. |

## Email 3 - User Experience Variations

This section discusses how the email might vary.

### Net Billing Customers

This image shows an example of how the Product Numbers Don't Match section of the email varies for Net Billing customers:

**Figure 2-32 Net Billing Variation****Newcomer with Less than 12 Months of Data**

When a customer has less than 12 months of billing data with the utility before moving to a solar program, the Solar 3 - Tracker module varies as follows:

- The heading discusses how the customer is tracking, and does not indicate that they are saving.
- Comparison box 1 displays average monthly electricity charges rather than average charges before going solar.
- Comparison box 2 displays total electricity charges rather than average charges since going solar.
- The data range statement includes only the dates during which the customer has been active on their solar program.

**Non-Saver Experience**

When a customer's spending increases or stays the same after moving to solar, the experience varies as follows:

- The Solar 3 - Tracker module heading reads, "Looks like you aren't seeing the savings you expected."
- The Solar 3 - Tracker - Message for Non-Savers module, described above, is included in the email.

**Buy All/Sell All**

The Production Numbers Don't Match portion of the email changes as follows:

- **Heading:** The heading reads "Confused about your solar bills?"
- **Explanatory Statement:** The statement reads "Solar customers like you often wonder how they are being billed for their electricity usage and solar production. Here's a simple explanation:".
- **Solar Provider Graphic:** This image is replaced with the Electricity Used graphic, which shows a power strip.
- **Solar Provider Subheading:** This subheading changes to read "Electricity Used".
- **Solar Provider Statement:** This statement is replaced with the electricity use statement, which reads "You are charged for the amount of energy that your home uses, regardless of whether it came from the grid or your solar panels. This is the same amount you would be paying if you didn't have solar panels."
- **Utility Graphic:** This image is replaced with the Electricity Produced graphic, which shows a solar panel.
- **Utility Subheading:** This subheading changes to read "Electricity Produced".
- **Utility Statement:** This statement is replaced with the solar product statement, which reads "You are credited for the amount of energy that your solar panels generate, regardless of whether it is used by your home or sent back to the grid."

- **Learn More About The Difference Button:** This button is replaced with the SEE YOUR USAGE AND PRODUCTION button, which redirects the customer to the utility's website.

## Email 4: Was Going Solar the Right Decision?

The fourth email solar customers receive is the Was Going Solar the Right Decision email. This message arrives approximately six months after a customer begins their solar program, and is triggered after Opower receives the sixth billed read in the data file.

The message provides a look at the average solar savings the customer is experiencing since starting their solar journey, showing them their average monthly bill before solar and after solar, and showing their average monthly savings. The message also provides tips on how they can become more energy efficient and further boost their savings, and enables them to access additional energy efficiency tips online.

The Was Going Solar the Right Decision email contains the following modules:

- Solar Email Header
- Solar 4 - Tracker
- Solar 4 - Tracker - Save Even More (Included only when average monthly costs decrease since switching to solar.)
- Solar 4 - Tracker - Message for Non Savers(Included only when average monthly costs stay the same or increase since switching to solar.)
- Solar Email Footer

## Email 4 - Design and Configuration

This section discusses the design of each module included in the email, and provides details on any available configuration options.

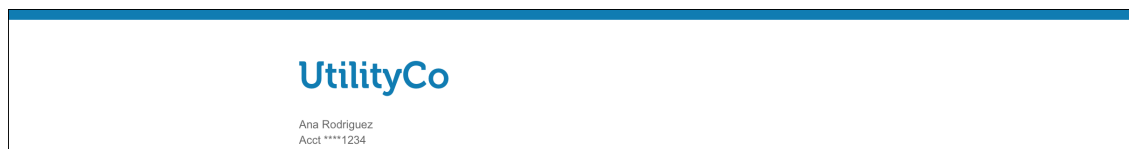
### Solar Email Header

This section discusses the design and configuration options for the Solar Email Header module.

#### Design

The email header introduces the reader to the email and displays the utility's logo and the customer's account number in the appropriate format.

**Figure 2-33 Solar Email Header**



#### Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

**Table 2-13 Configuration Options**

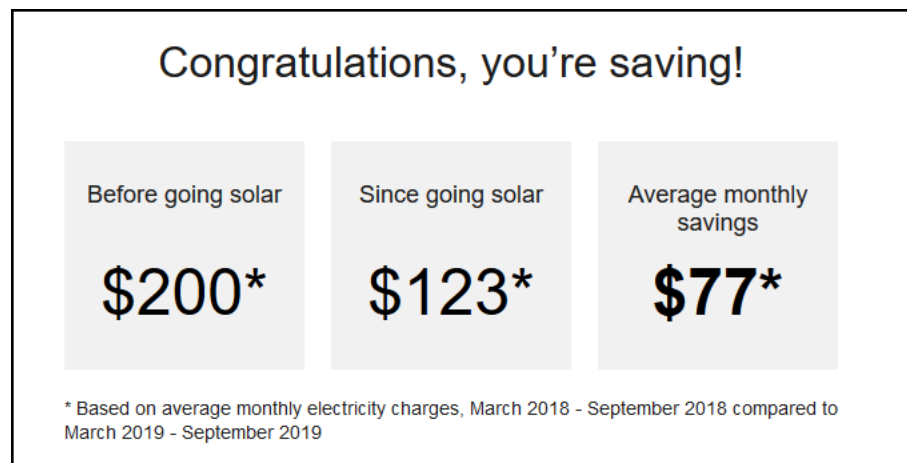
| Configuration Option  | Input Value   |
|---|---|
| <b>Company Logo</b><br>The RGB and CMYK versions of the utility logo as .ai files.<br>Example: UtilityCo_Logo_RGB.ai  | <b>Required</b><br>Provide the utility logo in the <a href="#">Oracle Utilities Opower Platform Configuration Guide</a> . |
| <b>Account Number</b><br>An example of how the customer account number is formatted on the bill. In your example, indicate how many digits should be displayed (in the example below, four digits are displayed).<br>Example: 12-34XX-XXX | <b>Required</b><br>Provide the utility logo in the <a href="#">Oracle Utilities Opower Platform Configuration Guide</a> . |

## Solar 4 Tracker Module

This section discusses the design and configuration options for the Solar 4 Tracker module.

### Design

This module provides customers with an at-a-glance view of how much they are saving since moving to their solar program. The following are components of the Tracker module:

**Figure 2-34 Solar 4 Tracker**

### Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

| Configuration Option  | Input Value   |
|---|---|
| <p><b>Heading</b></p> <p>You can modify the default heading text. The defaults for customers who are savers and non-savers are:</p> <ul style="list-style-type: none"> <li>Saver: Congratulations, you're saving!</li> <li>Non-Saver: Looks like you aren't seeing the savings you expected.</li> </ul>   | <p><b>Optional</b></p> <p>Choose one of the following:</p> <ul style="list-style-type: none"> <li>Use the default headings.</li> <li>Use the following headings:</li> </ul>   |
| <p><b>Disclaimer (Not Depicted)</b></p> <p>Utilities can use a disclaimer at the bottom of the module to provide any additional detail customers need to know.</p> <p><b>Default text when set to display:</b><br/>"These charges do not include natural gas charges; electricity charges from third-party solar suppliers; or the cost of ownership, maintenance, and insurance of solar equipment."<br/>A configurable URL can also be added to the disclaimer as needed.</p> | <p><b>Required</b></p> <p>Choose one of these options:</p> <ul style="list-style-type: none"> <li>Do not include a disclaimer.</li> <li>Use the default disclaimer.</li> <li>Use the following disclaimer:</li> </ul> |

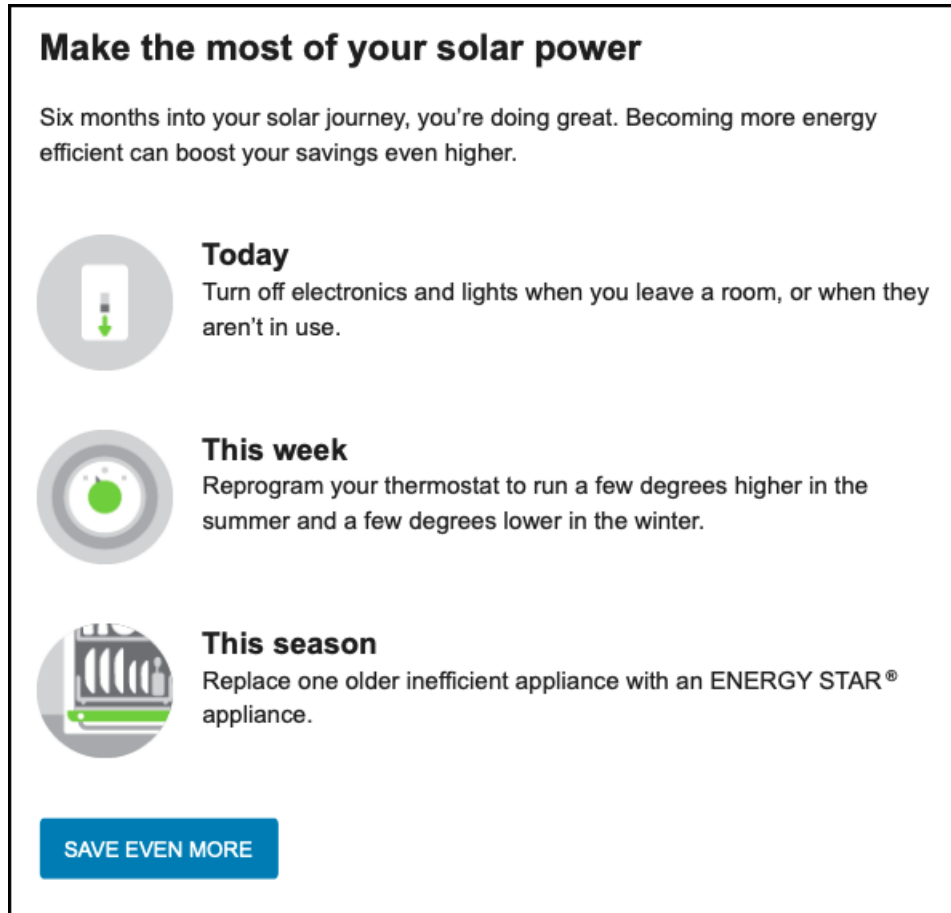
## Solar 4 Tracker Save Even More Module

This section discusses the design and configuration options for the Solar 4 Tracker Save Even More module.

### Design

This module provides users with tips they can complete to become more energy efficient. This module appears in the email only if the customer is saving since moving to solar. The following are components of the Save Even More module:

Figure 2-35 Solar 4 Tracker Save Even More



### Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

| Configuration Option  | Input Value   |
|---|---|
| <p><b>Tip Images</b></p> <p>All three tip images can be configured to use utility branding and colors.</p>  | <p><b>Optional</b></p> <p>Choose one of the following:</p> <ul style="list-style-type: none"> <li>Use the default images.</li> <li>Use utility-branded images.</li> </ul> |
| <p><b>Tip Heading and Text</b></p> <p>Energy Efficiency tips are researched and recommended, but these are configurable inputs, as tips may vary by locale and utility.</p> | <p><b>Optional</b></p> <p>Work with your delivery team to discuss tip configuration.</p>  |
| <p><b>Save Even More Button Text</b></p> <p>Use this button to direct customers to the utility's tips page.</p> <p>Default: Save Even More</p>                              | <p><b>Optional</b></p> <p>Choose one of the following:</p> <ul style="list-style-type: none"> <li>Use the default text.</li> <li>Use the following text:</li> </ul>       |

| Configuration Option  | Input Value  |
|---|--|
| <b>Save Even More Button URL</b>                                | <b>Required</b>  |
| Use this button to direct customers to the utility's tips page. | Specify the URL of the page you want to direct customers to. |

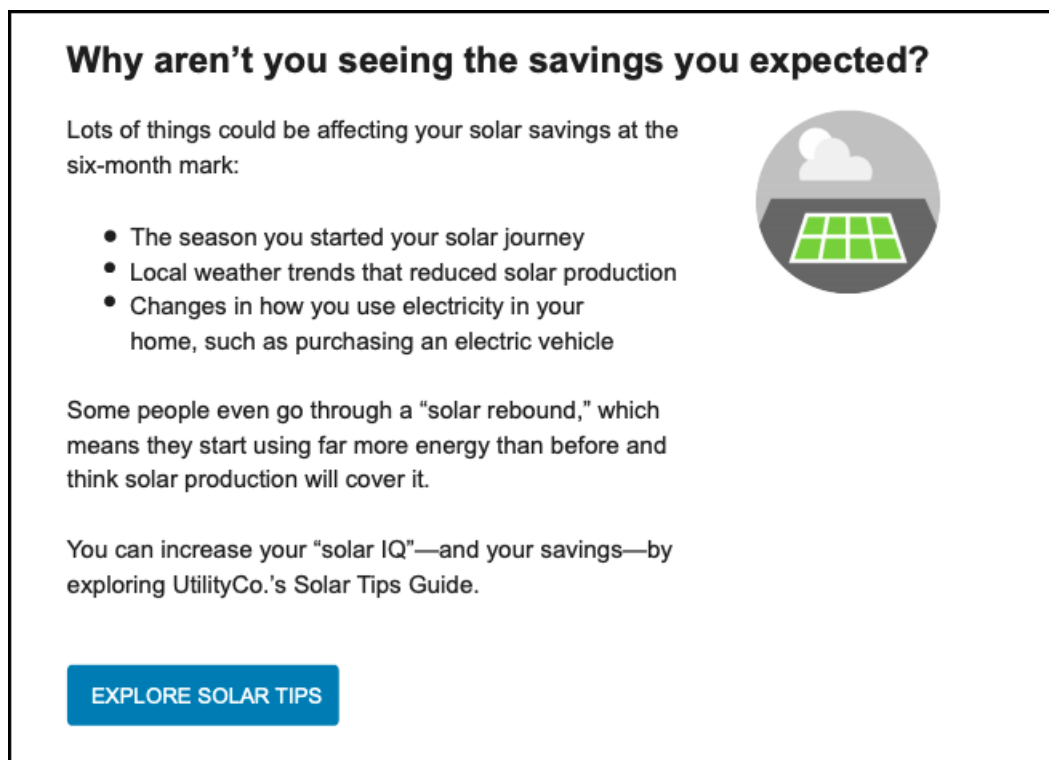
## Solar 4 Tracker Message for Non Saver Module

This section discusses the design and configuration options for the Solar 4 Tracker Message for Non Saver module.

### Design

This module offers customers who are not saving some possible explanations about why they have not experienced any savings since moving to a solar program. This module appears in the email only if the customer is not experiencing a savings (or has no change in savings) since moving to solar. The following are components of the Message for Non-savers module:

**Figure 2-36 Message for Non Savers**



### Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.



| Configuration Option   | Input Value  |
|--|--|
| <b>Solar Image</b><br>This image can be configured to use utility branding and colors.   | <b>Optional</b><br>Choose one of the following: <ul style="list-style-type: none"> <li>• Use the default image.</li> <li>• Use a utility-branded image.</li> </ul> |
| <b>Utility Company Name in Explanation Statement</b><br>The only recommended configuration of this statement is to include the utility's name in the last sentence.      | <b>Optional</b><br>Specify the name of the utility.  |
| <b>Explore Solar Tips Button Text</b><br>Use this button to direct customers to the utility's tips page.<br>Default: Explore Solar Tips                                  | <b>Optional</b><br>Choose one of the following: <ul style="list-style-type: none"> <li>• Use the default text.</li> <li>• Use the following text:</li> </ul>       |
| <b>Explore Solar Tips Button URL</b><br>Use this button to direct customers to the utility's tips page.<br>Default: Direct users to the Solar Tips page in Ways To Save. | <b>Required</b><br>Specify the URL of the page you want to direct customers to.  |

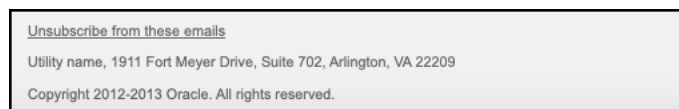
## Solar Email Footer

This section discusses the design and configuration options for the Solar Email Header module.

### Design

The email footer includes required information, such as the utility's address, and links to unsubscribe from emails and manage customer preferences. The footer also provides utilities with a space to include additional legal information, as needed.

**Figure 2-37 Solar Email Footer**



### Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

**Table 2-14 Configuration Options**

| Configuration Option   | Input Value                                       |
|--|---|
| <b>Utility Address</b><br>The address must appear in the email due to CAN-SPAM regulations in the US and similar regulations abroad. | <b>Required</b><br>Provide the utility's address. |

**Table 2-14 (Cont.) Configuration Options**

| Configuration Option  | Input Value  |
|---|--|
| <b>Legal Language</b><br>This statement can contain legal information, including copyright information, and any additional information the utility wants to include in the email message. | <b>Optional</b><br>Provide any legal language that must appear in the email. |

## Email 4 - User Experience Variations

This section discusses how the email can vary.

### Newcomer Experience

When a customer has less than 12 months of billing data with the utility before moving to a solar program, the Solar 4 - Tracker module varies as follows:

- The heading reads "Six months into your solar journey, here's how you're tracking."
- The heading in comparison box 1 reads "Your average monthly electricity charges".
- The heading in comparison box 2 reads "Your total electricity charges".
- The data range statement includes only the dates during which the customer has been active on their solar program. For example, "Based on electricity charges from March 2024 to August 2024."

### Non-Saver Experience

When a customer's spending increases or stays the same after moving to solar, the email varies as follows:

- The Solar 4 - Tracker heading changes to indicate that the customer isn't experiencing the savings they expected.
- The third comparison box displays the average monthly increase instead of the average monthly savings.
- The Solar 4 - Tracker - Save Even More module is omitted, and replaced with the Solar 4 - Tracker - Message for Non-Savers module.

## Email 5: Build Your Solar Expertise

The fifth email solar customers receive is the Build Your Solar Expertise email. This message arrives approximately nine months after a customer begins their solar program, and is triggered after Opower receives the ninth billed read in the data file.

The message provides average monthly savings information, and additional details about how seasons, weather, and temperatures can impact energy savings and production for solar customers. The message enables users to access additional online resources, such as the Digital Self Service - Energy Management Data Browser, where they can view weather data, or the utility's online tips page.

The Build Your Solar Expertise email contains these modules:

- Solar Email Header

- Solar 5 - Tracker
- Solar 5 - Weather, Season, Temp
- Solar 5 - EE Message for Everyone
- Solar Email Footer

## Email 5 - Design and Configuration

This section discusses the design of each module included in the email, and provides details on any available configuration options.

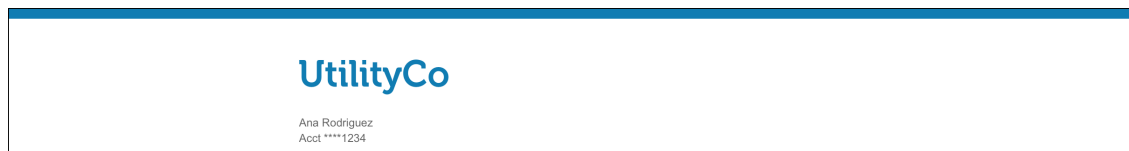
### Solar Email Header

This section discusses the design and configuration options for the Solar Email Header module.

#### Design

The email header introduces the reader to the email and displays the utility's logo and the customer's account number in the appropriate format.

**Figure 2-38 Solar Email Header**



#### Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

**Table 2-15 Configuration Options**

| Configuration Option   | Input Value   |
|--|---|
| <p><b>Company Logo</b></p> <p>The RGB and CMYK versions of the utility logo as .ai files.</p> <p>Example: UtilityCo_Logo_RGB.ai</p>  | <p><b>Required</b></p> <p>Provide the utility logo in the <a href="#">Oracle Utilities Opower Platform Configuration Guide</a>.</p> |
| <p><b>Account Number</b></p> <p>An example of how the customer account number is formatted on the bill. In your example, indicate how many digits should be displayed (in the example below, four digits are displayed).</p> <p>Example: 12-34XX-XXX</p> | <p><b>Required</b></p> <p>Provide the utility logo in the <a href="#">Oracle Utilities Opower Platform Configuration Guide</a>.</p> |

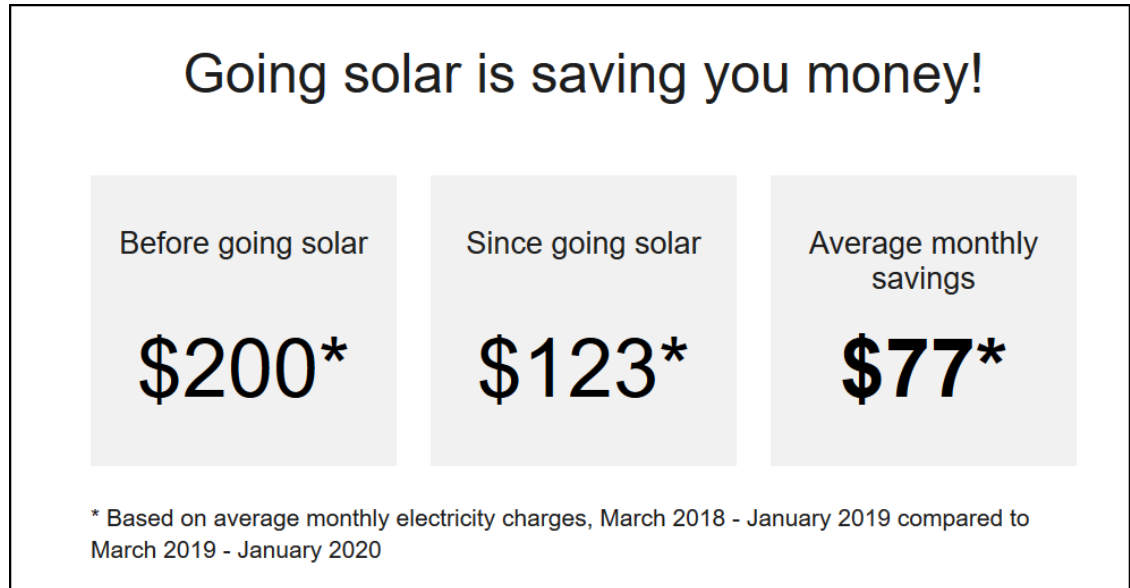
### Solar 5 Tracker Module

This section discusses the design and configuration options for the Solar 5 Tracker module.

**Design**

This module provides customers with an at-a-glance view of how much they are saving since moving to their solar program.

**Figure 2-39 Solar 5 Tracker**



**Configuration Options**

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

| Configuration Option   | Input Value   |
|--|---|
| <p><b>Heading</b></p> <p>You can modify the default heading text. The defaults for customers who are savers and non-savers are:</p> <ul style="list-style-type: none"> <li>Saver: Going solar is saving you money!</li> <li>Non-Saver: Going solar hasn't paid off yet.</li> </ul> | <p><b>Optional</b></p> <p>Choose one of the following:</p> <ul style="list-style-type: none"> <li>Use the default headings.</li> <li>Use the following headings:</li> </ul> |

| Configuration Option  | Input Value   |
|---|---|
| <p><b>Disclaimer (Not Depicted)</b></p> <p>Utilities can use a disclaimer at the bottom of the module to provide any additional detail customers need to know.</p> <p><b>Default text when set to display:</b><br/>           "These charges do not include natural gas charges; electricity charges from third-party solar suppliers; or the cost of ownership, maintenance, and insurance of solar equipment."<br/>           A configurable URL can also be added to the disclaimer as needed.</p> | <p><b>Optional</b></p> <p>Choose one of the following:</p> <ul style="list-style-type: none"> <li>• Do not include a disclaimer.</li> <li>• Use the default disclaimer.</li> <li>• Use the following disclaimer:</li> </ul> |

## Solar 5 Weather, Seasons, Temp Module

This section discusses the design and configuration options for the Solar 5 Weather, Seasons, Temp module.


### Design

This module explains to customers how seasons, temperature and weather can impact their solar production.


Figure 2-40 Weather, Seasons, Temperature

### Seasons, weather, and solar production


While it's basically true that sunny skies equal solar energy, there's more to know about how seasonal differences and weather trends impact solar production. Here are a few facts to get you started.



**Seasons**  
Winter or summer, sunny skies generate electricity. But there are fewer hours of daylight in winter and the angle of the sun is less direct, so solar production is lower.



**Weather**  
Your panels do produce electricity on cloudy days, but less than on a sunny day. Rainy days reduce production, but also clean dust, leaves, and pollen from your panels.



**Temperature**  
Your panels produce more efficiently at cooler temperatures. Above 77°F, production goes down a bit; but, since warm weather means longer sunny days you may not notice a difference.

View personalized graphs showing how local weather has impacted your net solar production (and your electricity costs).

[VIEW MY WEATHER DATA](#)

### Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

| Configuration Option   | Input Value   |
|--|---|
| <p><b>Seasons, Weather, and Temperature Graphics</b></p> <p>These images can be configured to use utility branding and colors.</p> | <p><b>Optional</b></p> <p>Choose one of the following:</p> <ul style="list-style-type: none"> <li>• Use the default images.</li> <li>• Use a utility-branded images.</li> </ul> |

| Configuration Option  | Input Value   |
|---|---|
| <p><b>Seasons and Weather Text</b></p> <p>The text that displays below the Seasons graphic and the Weather graphic can be configured to accommodate differences in locale for the utility.</p> <p>Default statements:</p> <ul style="list-style-type: none"> <li>• <b>Seasons:</b> Winter or summer, sunny skies generate electricity. But there are fewer hours of daylight in winter, and the angle of the sun is less direct, so solar production is lower.</li> <li>• <b>Weather:</b> Your panels do produce electricity on cloudy days, but less than on a sunny day. Rainy days reduce production, but also clean dust, leaves, and pollen from your panels.</li> </ul> | <p><b>Optional</b></p> <p>Choose one of the following:</p> <ul style="list-style-type: none"> <li>• Use the default statements.</li> <li>• Use these statements:</li> </ul> |
| <p><b>View My Weather Data Button Text</b></p> <p>Use this button to direct customers to the utility's weather data page.</p> <p>Default: View My Weather Data</p>  | <p><b>Optional</b></p> <p>Choose one of the following:</p> <ul style="list-style-type: none"> <li>• Use the default text.</li> <li>• Use the following text:</li> </ul>     |
| <p><b>View My Weather Data Button URL</b></p> <p>Use this button to direct customers to the utility's weather data page.</p>  | <p><b>Required</b></p> <p>Specify the URL of the page you want to direct customers to.</p>  |

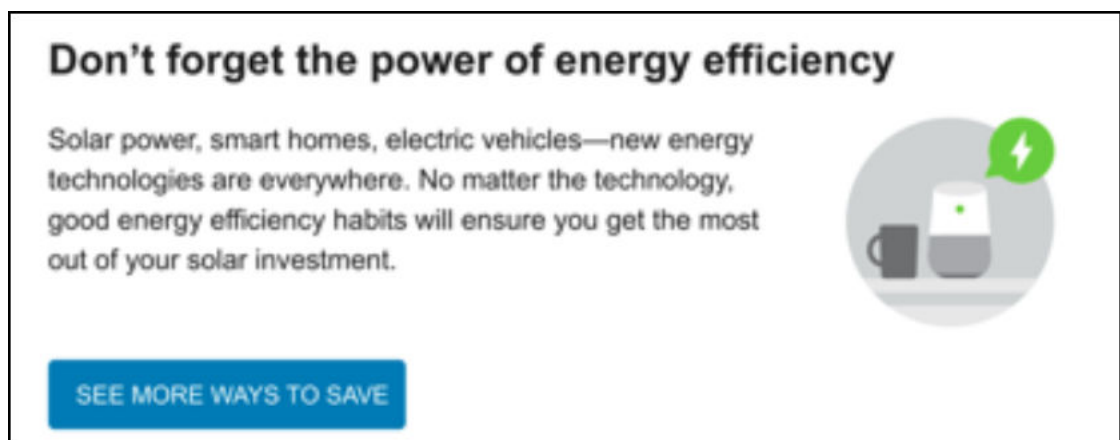
## Solar 5 EE Message for Everyone Module

This section discusses the design and configuration options for the Solar EE Message for Everyone module.

### Design

This module reminds customers of additional things they can do to become more energy efficient, and provides them with access to energy saving tips.

**Figure 2-41 Energy Efficiency for Everyone**



## Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

| Configuration Option  | Input Value  |
|---|--|
| <b>Energy Efficiency Image</b><br>This image can be configured to use utility branding and colors.  | <b>Optional</b><br>Choose one of the following: <ul style="list-style-type: none"> <li>Use the default image.</li> <li>Use a utility-branded image.</li> </ul> |
| <b>See More Ways to Save Button Text</b><br>Use this button to direct customers to the utility's tips page.<br>Default: See More Ways to Save                     | <b>Optional</b><br>Choose one of the following: <ul style="list-style-type: none"> <li>Use the default text.</li> <li>Use the following text:</li> </ul>       |
| <b>See More Ways to Save Button URL</b><br>Use this button to direct customers to the utility's tips page.<br>Default: Direct customers to the Ways to Save page. | <b>Required</b><br>Specify the URL of the page you want to direct customers to.  |

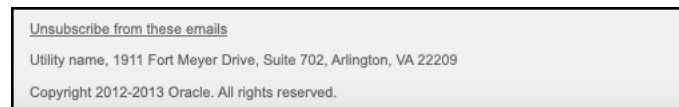
## Solar Email Footer

This section discusses the design and configuration options for the Solar Email Header module.

### Design

The email footer includes required information, such as the utility's address, and links to unsubscribe from emails and manage customer preferences. The footer also provides utilities with a space to include additional legal information, as needed.

**Figure 2-42 Solar Email Footer**



## Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

**Table 2-16 Configuration Options**

| Configuration Option   | Input Value                                       |
|--|---|
| <b>Utility Address</b><br>The address must appear in the email due to CAN-SPAM regulations in the US and similar regulations abroad. | <b>Required</b><br>Provide the utility's address. |



**Table 2-16 (Cont.) Configuration Options**

| Configuration Option  | Input Value  |
|---|--|
| <b>Legal Language</b><br>This statement can contain legal information, including copyright information, and any additional information the utility wants to include in the email message. | <b>Optional</b><br>Provide any legal language that must appear in the email. |

## Email 5 - User Experience Variations

This section discusses how the email can vary.

### Newcomer Experience

When a customer has less than 12 months of billing data with the utility before moving to a solar program, the Solar 5 - Tracker module varies as follows:

- The heading tells the customer how they are tracking, rather than congratulating them on saving.
- Comparison box 1 displays average monthly electricity charges rather than before solar data.
- Comparison box 2 displays total electricity charges rather than charges after going solar.
- Comparison box 3 is not displayed.
- The data range statement includes only the dates during which the customer has been active on their solar program.

### Non-Saver Experience

For customers who are not saving since moving to solar, the Solar 5 - Tracker module varies as follows:

- The heading discusses how the customer isn't saving yet.
- Comparison box 3 displays average monthly increase rather than average monthly savings.

## Email 6: Your First Solar Year in Review

The sixth and final email solar customers receive is the Your First Solar Year In Review email. This message arrives approximately 12 months after a customer begins their solar program, and is triggered after Opower receives the 12th billed read in the data file.

This message provides an annual summary of the customer's electric charges compared the previous year, and highlights how much they saved by switching to solar. The message also provides easy access to the utility's online resources such as energy-saving tips and solar billing resources. Finally, the message tells the customer that they will no longer receive solar emails.

The Your First Solar Year In Review email contains these modules:

- Solar Email Header
- Solar 6 - Tracker

- Solar 6 - Tracker - EE For Savers (Included only when annual costs have decreases since switching to solar.)
- Solar 6 - Tracker - Message for Non Savers (Included only when annual costs stay the same or increase since switching to solar.)
- Solar 6 - Explore Data Browser
- Solar Email Footer

## Email 6 - Design and Configuration

This section discusses the design of each module included in the email, and provides details on any available configuration options.

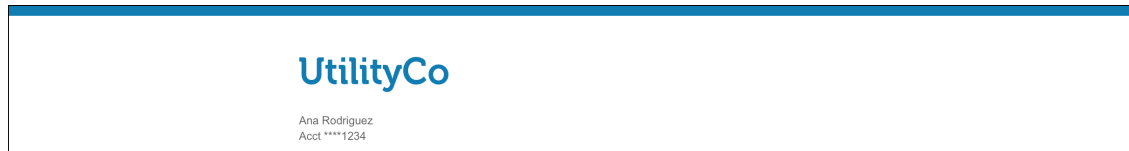
### Solar Email Header

This section discusses the design and configuration options for the Solar Email Header module.

#### Design

The email header introduces the reader to the email and displays the utility's logo and the customer's account number in the appropriate format.

**Figure 2-43 Solar Email Header**



#### Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

**Table 2-17 Configuration Options**

| Configuration Option  | Input Value   |
|---|---|
| <b>Company Logo</b><br>The RGB and CMYK versions of the utility logo as .ai files.<br>Example: UtilityCo_Logo_RGB.ai  | <b>Required</b><br>Provide the utility logo in the <a href="#">Oracle Utilities Opower Platform Configuration Guide</a> . |
| <b>Account Number</b><br>An example of how the customer account number is formatted on the bill. In your example, indicate how many digits should be displayed (in the example below, four digits are displayed).<br>Example: 12-34XX-XXX | <b>Required</b><br>Provide the utility logo in the <a href="#">Oracle Utilities Opower Platform Configuration Guide</a> . |

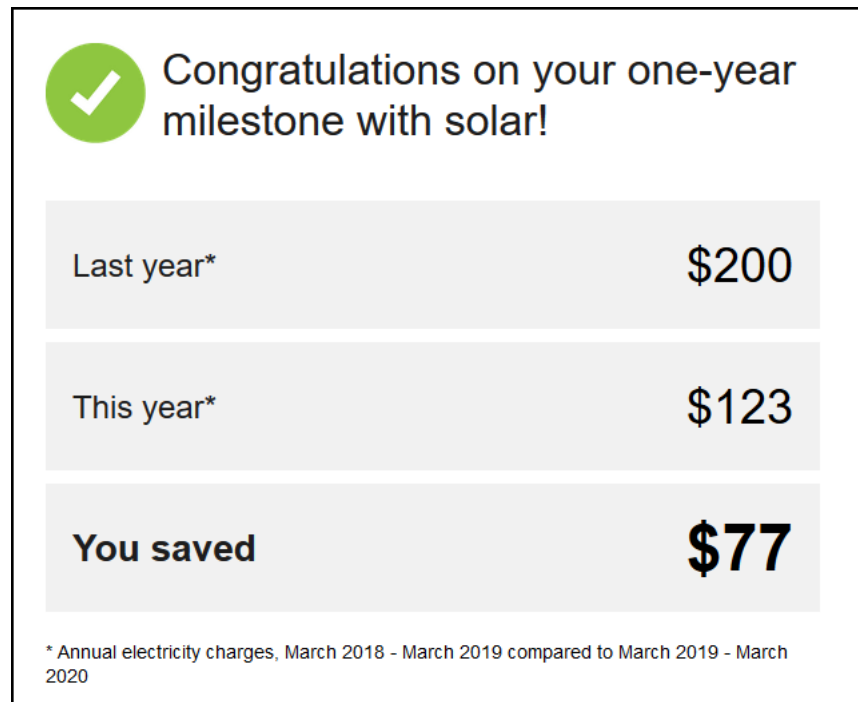
## Solar 6 Tracker Module

This section discusses the design and configuration options for the Solar 6 Tracker module.

### Design

This module congratulates customers on the completion of one year on a solar program, and provides an at-a-glance view of how much they saved during the year.

**Figure 2-44 Solar 6 Tracker**



### Configuration Guide

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

| Configuration Option   | Input Value  |
|--|--|
| <p><b>Disclaimer (Not Depicted)</b><br/>Utilities can use a disclaimer at the bottom of the module to provide any additional detail customers need to know.</p> <p><b>Default text when set to display:</b><br/>"These charges do not include natural gas charges; electricity charges from third-party solar suppliers; or the cost of ownership, maintenance, and insurance of solar equipment."<br/>A configurable URL can also be added to the disclaimer as needed.</p> | <p><b>Required</b><br/>Choose one of the following:</p> <ul style="list-style-type: none"> <li>Do not include a disclaimer.</li> <li>Use the default disclaimer.</li> <li>Use the following disclaimer:</li> </ul> |

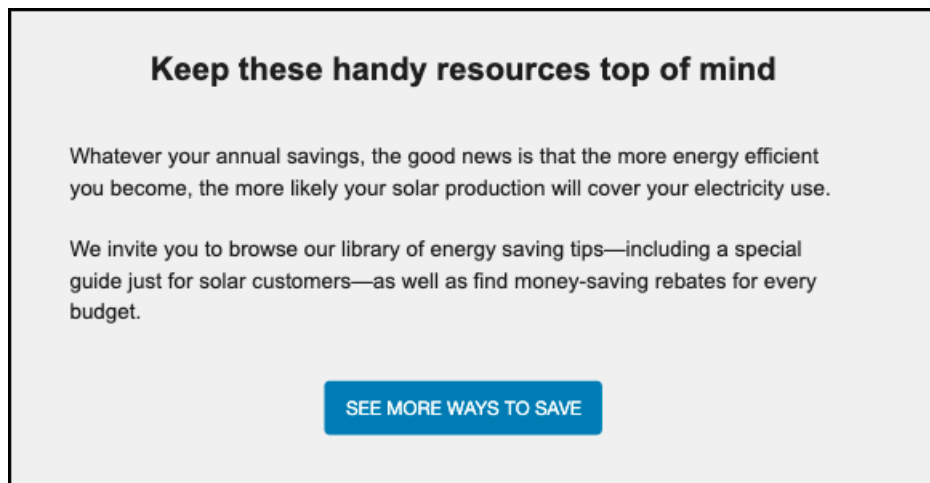
## Solar 6 Tracker EE for Savers Module

This section discusses the design and configuration options for the Solar 6 Tracker EE for Savers module.

### Design

This module encourages customers to become more energy efficient, and appears in the email only when the customer has experienced savings since moving to solar.

**Figure 2-45 Energy Efficiency for Savers**



### Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

| Configuration Option  | Input Value   |
|---|---|
| <p><b>Explanatory Statement</b></p> <p>This statement can be configured to reflect the utility's specific offering.</p> <p>Default:</p> <p>Whatever your annual savings, the good news is that the more energy efficient that you become, the more likely your solar production will cover your electricity use.</p> <p>We invite you to browse our library of energy saving tips - including a special guide just for solar customers - as well as find money-saving rebates for every budget.</p> | <p><b>Optional</b></p> <p>Choose one of the following:</p> <ul style="list-style-type: none"> <li>• Use the default text.</li> <li>• Use the following text:</li> </ul> |
| <p><b>See More Ways to Save Button Text</b></p> <p>Use this button to direct customers to the utility's tips page.</p> <p>Default: See More Ways to Save</p>  | <p><b>Optional</b></p> <p>Choose one of the following:</p> <ul style="list-style-type: none"> <li>• Use the default text.</li> <li>• Use the following text:</li> </ul> |

| Configuration Option   | Input Value   |
|--|---|
| <b>See More Ways to Save Button URL</b><br>Use this button to direct customers to the utility's tips page. | <b>Required</b><br>Specify the URL of the page you want to direct customers to. |

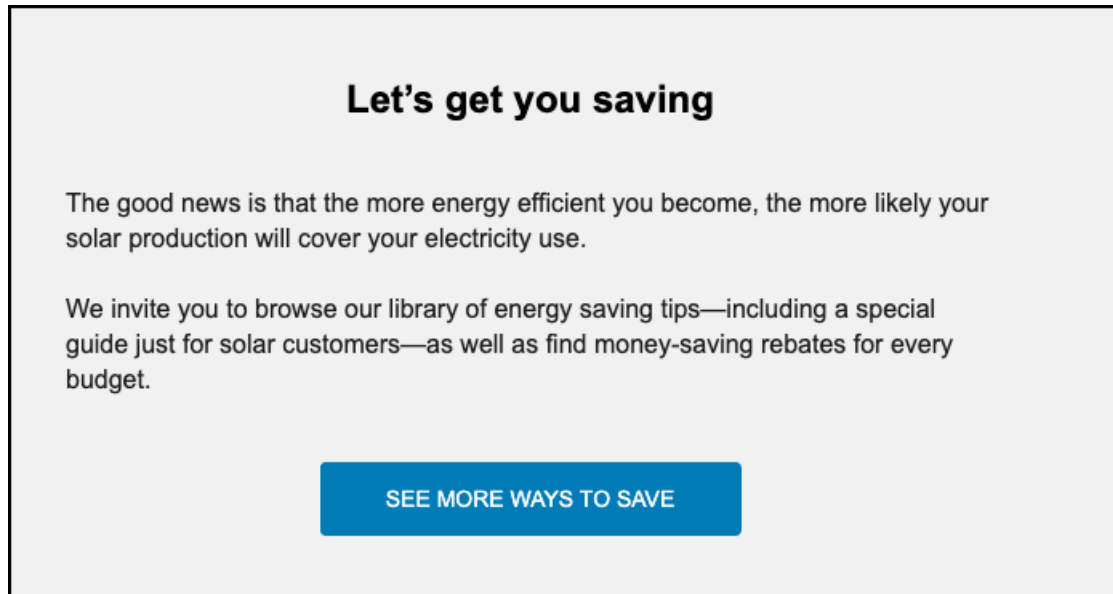
## Solar 6 Tracker Message for Non Savers Module

This section discusses the design and configuration options for the Solar 6 Tracker Message for Non Savers module.

### Design

This module encourages customers to become more energy efficient, and appears in the email only when the customer has not experienced a savings since moving to solar.

**Figure 2-46 Message for Non-Savers**



### Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

| Configuration Option  | Input Value   |
|---|---|
| <p><b>Explanatory Statement</b></p> <p>This statement can be configured to reflect the utility's specific offering.</p> <p>Default:</p> <p>Whatever your annual savings, the good news is that the more energy efficient that you become, the more likely your solar production will cover your electricity use.</p> <p>We invite you to browse our library of energy saving tips - including a special guide just for solar customers - as well as find money-saving rebates for every budget.</p> | <p><b>Optional</b></p> <p>Choose one of the following:</p> <ul style="list-style-type: none"> <li>• Use the default text.</li> <li>• Use the following text:</li> </ul> |
| <p><b>See More Ways to Save Button Text</b></p> <p>Use this button to direct customers to the utility's tips page.</p> <p>Default: See More Ways to Save</p>  | <p><b>Optional</b></p> <p>Choose one of the following:</p> <ul style="list-style-type: none"> <li>• Use the default text.</li> <li>• Use the following text:</li> </ul> |
| <p><b>See More Ways to Save Button URL</b></p> <p>Use this button to direct customers to the utility's tips page.</p>   | <p><b>Required</b></p> <p>Specify the URL of the page you want to direct customers to.</p>  |

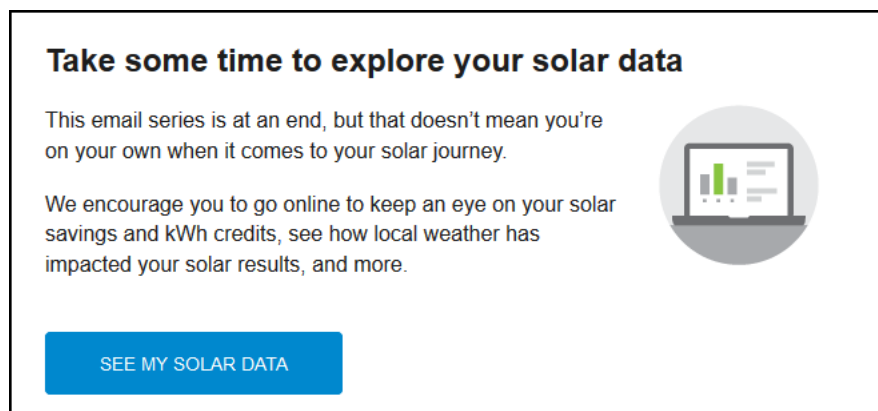
## Solar 6 Explore Data Browser Module

This section discusses the design and configuration options for the Solar 6 Explore Data Browser module.

### Design

This module directs solar customers to additional resources at the utility. Customers can use these resources to review additional information about their solar program.

**Figure 2-47 Explore Data Browser**



### Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

| Configuration Option   | Input Value   |
|--|---|
| <p><b>Image</b></p> <p>This image can be configured to use utility branding and colors.</p>  | <p><b>Optional</b></p> <p>Choose one of the following:</p> <ul style="list-style-type: none"> <li>Use the default image.</li> <li>Use a utility-branded image.</li> </ul> |
| <p><b>Explanatory Statement</b></p> <p>This statement can be configured to reflect the utility's specific offering.</p> <p>Default:</p> <p>This email series is at an end, but that doesn't mean you're on your own when it comes to your solar journey.</p> <p>We encourage you to go online to keep an eye on your solar savings and kWh credits, see how local weather has impacted your solar results, and more.</p> | <p><b>Optional</b></p> <p>Choose one of the following:</p> <ul style="list-style-type: none"> <li>Use the default text.</li> <li>Use the following text:</li> </ul>       |
| <p><b>See My Solar Data Button Text</b></p> <p>Use this button to direct customers to the utility's solar data page.</p> <p>Default: See My Solar Data</p>   | <p><b>Optional</b></p> <p>Choose one of the following:</p> <ul style="list-style-type: none"> <li>Use the default text.</li> <li>Use the following text:</li> </ul>       |
| <p><b>See My Solar Data Button URL</b></p> <p>Use this button to direct customers to the utility's solar data page.</p>  | <p><b>Required</b></p> <p>Specify the URL of the page you want to direct customers to.</p>  |

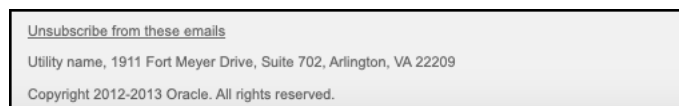
## Solar Email Footer

This section discusses the design and configuration options for the Solar Email Header module.

### Design

The email footer includes required information, such as the utility's address, and links to unsubscribe from emails and manage customer preferences. The footer also provides utilities with a space to include additional legal information, as needed.

**Figure 2-48 Solar Email Footer**



### Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

**Table 2-18 Configuration Options**

| Configuration Option  | Input Value  |
|---|--|
| <b>Utility Address</b><br>The address must appear in the email due to CAN-SPAM regulations in the US and similar regulations abroad.  | <b>Required</b><br>Provide the utility's address.                            |
| <b>Legal Language</b><br>This statement can contain legal information, including copyright information, and any additional information the utility wants to include in the email message. | <b>Optional</b><br>Provide any legal language that must appear in the email. |

## Email 6 - User Experience Variations

This section discusses how the email can vary.

### Newcomer Experience

When a customer has less than 12 months of billing data with the utility before moving to a solar program, the Solar 6 - Tracker module is replaced with the Solar 5 - Tracker module from Email 5, and displays the following:

- The heading congratulates the customer on their one-year milestone with solar.
- Comparison box 1 displays average monthly electricity charges rather than before solar data.
- Comparison box 2 displays total electricity charges rather than after solar data.
- Comparison box 3 is omitted.
- The data range statement includes only the dates during which the customer has been active on their solar program. For example, "Based on electricity charges from March 2024 to February 2025."

### Non-Saver Experience

If the customer is not saving since moving to solar, the email varies as follows:

- The Solar 6 - Tracker module does not display the You Saved section.
- The Solar 6 - Tracker - Message for Non-Savers module is included in the email in place of the Solar 6 - Tracker - EE for Savers module.



# 3

## Enrollment and Delivery

This section discusses enrollment and delivery of Distributed Energy Resources features.

### Enrollment and Delivery for Solar Web Features

Customers are not required to enroll in any programs to view solar web insights. These insights are automatically displayed when eligible customers access the Digital Self Service - Energy Management Data Browser, Bill Comparison, or Bill Forecast.

### Enrollment and Delivery for Solar Update Notifications

This section discusses the enrollment and delivery restrictions associated with the Solar Update Notifications.

#### Enrollment

Customers can be enrolled to receive Solar Update Notification emails through an opt-out program. In an opt-out program, customers are automatically enrolled as long as they meet the eligibility criteria, and they can unsubscribe at any time.

#### Delivery

Solar Update Notification emails are regularly scheduled communications. The rules that govern delivery of these emails include:

- **Waking Hours:** Solar emails must be delivered during waking hours (between 9 a.m. and 6 p.m.) in a utility-specific delivery window. You cannot choose the specific time to send.
- **Weekdays:** Solar emails must be delivered only on business days (Monday-Friday). They cannot be delivered on weekends.
- **Delivery Frequency and Cadence:** Customers receive each Solar Update Notification email one time, after meeting the necessary milestone for each communication.
- **Delivery Tools:** Oracle uses third-party tools to send solar. Most of these tools provide Oracle Utilities with information on bounces, opens, opt-outs, and click-throughs.
- **Emails and Attachments:** For email communications, the email content is delivered directly in the email message with no attachments. This makes it more convenient for customers to quickly view the information, and it makes the emails less likely to be blocked by spam filters.

# 4

## Next Steps

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

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

### **Note**

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

# 5

## Contact Your Delivery Team

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

**To contact your Delivery Team:**

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

If you need to report an issue or get technical support, contact [My Oracle Support](#).