Oracle® Utilities Opower High Bill Alerts, Residential Cloud Service

High Bill Alerts AMI V3 Configuration Guide

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ORACLE

Oracle Utilities Opower High Bill Alerts, Residential Cloud Service High Bill Alerts AMI V3 Configuration Guide,

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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 High Bill Alert AMI program, which includes:

- Email Alerts
- Text Alerts
- Voice Alerts
- Mobile Push Alerts
- Load Shifting High Bill Alert Emails

> **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.

Product Overview

High Bill Alerts AMI v3 are messages designed to help residential AMI customers save energy and money when they are likely to use more than usual for a billing period. The alerts can be sent through the email, text message, voice message, and mobile push channels.

> **Note**
>
> To send water alerts, utilities must also have the Digital Self Service - Transactions Cloud Service. See the Oracle Utilities Opower Digital Self Service - Transactions Product Overview for more information.

For more information about the features, requirements, and user experience variations of the product, see the Oracle Utilities Opower Proactive Alerts Product Overview.

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.

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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 only provides 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 Delivery Team how customization options could enhance your program.

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.

Email Alerts

Email High Bill Alerts AMI v3 are digital messages sent through the email channel to inform customers when they are on track for a high bill or high use for the current period. The user experience can vary widely, depending on many factors, such as:

- Which fuel/resource types the customer has.
- Whether cost or usage is displayed.
- Whether the utility or the customer has set up a threshold.
- Whether the customer is part of utility programs, such as budget billing.

> **Note**
>
> For utilities to send water alerts, they must also have the Digital Self Service - Transactions Cloud Service. See the Oracle Utilities Opower Digital Self Service - Transactions Product Overview for additional information.

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Each email is comprised of individual modules, each of which can vary depending on these factors. This graphic shows an example of what the Email High Bill Alert AMI v3 might look like for a customer.

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UtilityCo

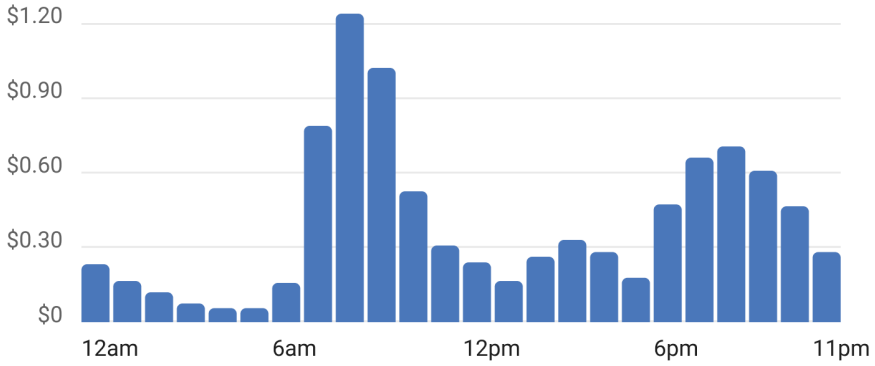
Account #******7890

Your bill is projected to be **$230**

That's $50 more than this time last year. The bill period ends May 28.

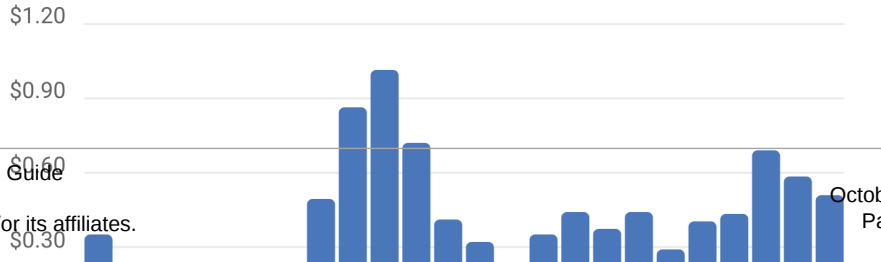
Your average electricity spending on **weekdays**

Apr 30 - May 14



Your average spending on **weekends**

Apr 30 - May 14



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This table lists the recommended module order for several different types of Email High Bill Alerts AMI v3:

Type of Email	Suggested Order of Modules
Single Fuel (electricity-only, gas-only, water-only)	1. Subject Lines and Header Module 2. Introduction Module 3. Trends Module 4. Weather Insights Module 5. Ways To Save Module 6. Marketing Module (optional) 7. Home Energy Analysis Module (optional) 8. User Feedback Module (optional) 9. Personal Threshold Module (optional) 10. Footer Module
Dual Fuel (electricity and gas or electricity and water)	1. Subject Lines and Header Module 2. Introduction Module 3. Multi Service Comparison Module 4. Weather Insights Module 5. Ways To Save Module 6. Marketing Module (optional) 7. Home Energy Analysis Module (optional) 8. User Feedback Module (optional) 9. Personal Threshold Module (optional) 10. Footer Module

Email-Wide 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.

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Configuration Options	Input Value
Fonts and Colors All images are shown with default fonts and colors. The email can be updated to use a utility's fonts and color branding scheme.	**Optional** Choose one of the following: Use default fonts and colors. Work with your delivery team to select utility-branded fonts and colors.
Alert Delivery Window The delivery window refers to the days in the month during which High Bill Alerts (AMI) can be sent to customers. The default window for sending High Bill Alerts (AMI) is seven days after a new bill period starts and seven days before the bill period ends.	**Optional** Choose one of the following: Use the default delivery window. Use the following delivery window:

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Configuration Options	Input Value
Energy Use Experience If rates are modeled, High Bill Alerts AMI v3 displays energy cost information across the alerts and communications by default. All experiences can be configured to show energy use experience. Be aware this configuration applies across all alerts and communications for the product.	**Optional** Choose one of the following: Use the default behavior, which displays costs for customers that meet cost data requirements. Display an energy use experience for all customers across all product communications and alerts.

Subject Lines and Header Module

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

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Design

This section discusses the design of the subject lines and Header module.

Subject Line

"Your bill is projected to be higher this month. There are still ways to save."

Note: The subject line can vary depending on the customer's program design and preferred language.

Header Module

This image shows an example of the header.

Configuration Options

This section discusses the configuration options for the Header module.

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 Options	Input Value
Logo The utility must provide a logo to include in the header of the email.	**Required** Provide the logo file to the delivery team.

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Configuration Options	Input Value
Account Number Characters Masked The utility can specify how many characters of the customer's account number are displayed in the header. Note that this configuration is used for all Oracle Utilities outbound email communications that the utility sends, and should be set only once for all outbound communications. **Default:** Display the last four characters.	**Required** Choose one of the following: Display the last four characters. (Default) Display the following number of characters:
Hide Premise Address The premise address can be enabled to appear after the account number for customers with one or more premises. **Default:** Display the premise address.	**Optional** Choose one of the following: Do not display premise address. Display premise address. (Default)

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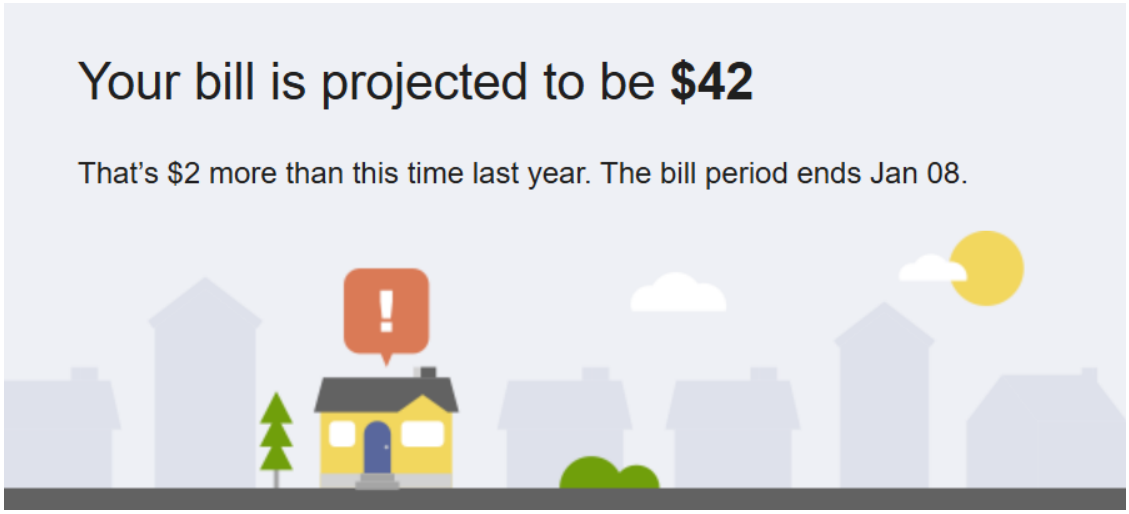
Configuration Options	Input Value
Include Customer Name The name of the customer can be enabled to appear before the account number. **Default:** Hide the customer name.	**Optional** Choose one of the following: Do not display the customer name. (Default) Display the customer name.

Introduction Module

The Introduction module provides a projection of how much the customer could spend on their utility bill if they continue their spending behavior through the end of the billing period.

Design

This image shows an example of the Introduction module with an energy costs experience:



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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 Options	Input Value
Budget Billing Language A note regarding how high usage will affect the customer's bills in the future is included. **Default:** As a budget billing consumer, your costs may increase in the future if you use more energy than usual.	**Optional** Choose one of these options: Use the default statement. Use the following statement:

Multi Service Comparison Module

The Multi-Service Comparison module is included in the Email High Bill Alert AMI for customers who have multiple services, such as water and electric or gas and electric. The module includes two bar graphs. Each graph compares projected costs to costs from the same billing period of the previous year, or compares projected energy use to energy use from the same billing period of the previous year. One graph shows electricity and the other shows the additional service, either water or gas. A dollar amount is displayed above each graph bar, or the applicable energy use unit for the given service it is referencing displays above each graph bar.

> **Note**
>
> Data for the water portion of the module can include standard water service, wastewater, and sprinklers.

Design

The images below show examples of the Multi Service Comparison module.

Electricity and Gas Example

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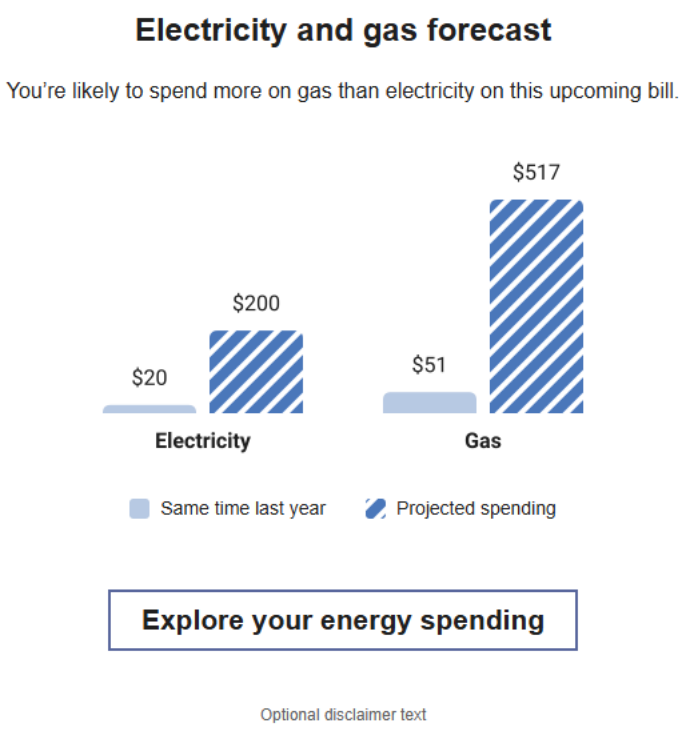

Electricity and Water Example

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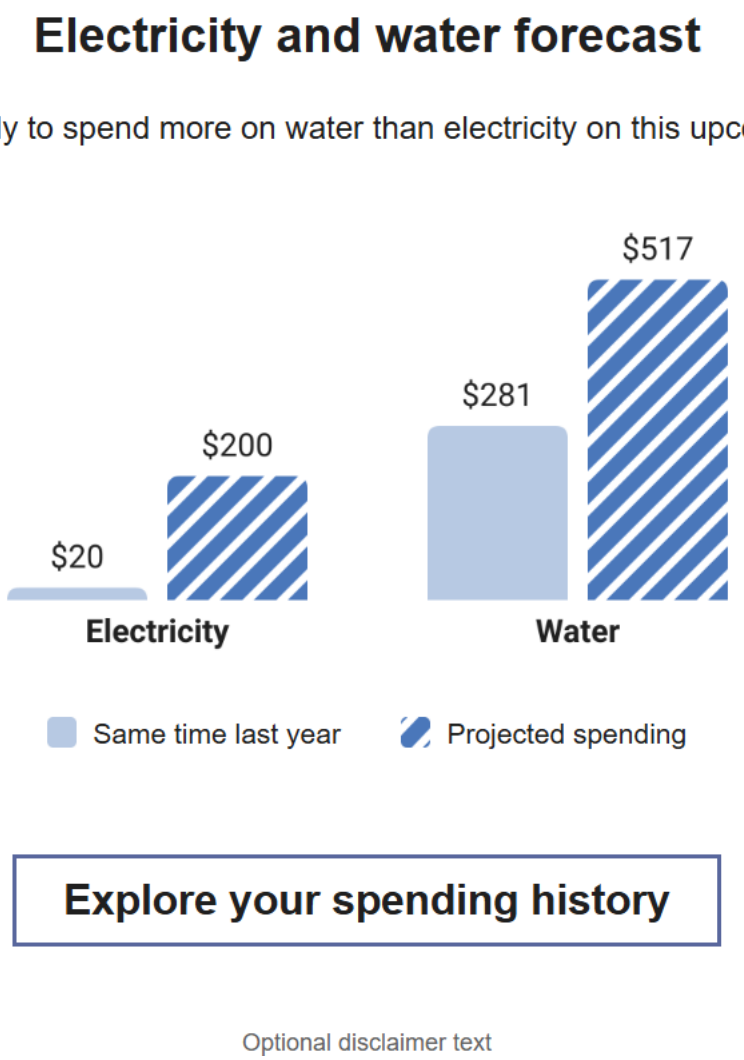

Configuration Options

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.

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Configuration Options	Input Value
Heading You can update the heading of the module, which matches the services of the customer. **Defaults:** • Electricity and gas forecast • Electricity and water forecast	**Optional** Choose one of the following: Use the "Electricity and water breakdown" heading. (Default) Use the following heading:
Bar Chart Labels The labels below the bars in the chart can be updated. **Defaults:** • Electricity • Gas • Water	**Optional** Choose one of the following: Use the default labels. Use the following labels:

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Configuration Options	Input Value
Legend Labels The legend labels below the chart can be updated. Defaults: • Projected spending • Same time last year	**Optional** Choose one of the following: Use the default labels. Use the following labels:
Disclaimer Text You can provide disclaimer text that is displayed below the comparison chart. **Default**: Optional disclaimer text.	**Optional** Choose one of the following: Remove the default disclaimer text and exclude the disclaimer. Use the following disclaimer text:

Trends Module

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

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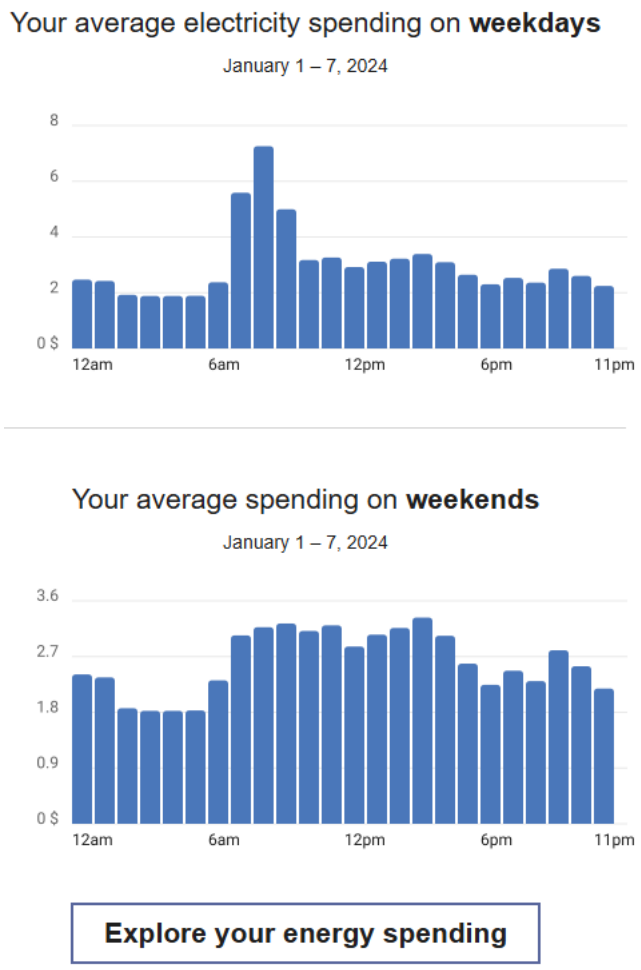
Design

This image shows an example of the Trends module.



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.

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Configuration Options	Input Value
Heading Weekdays Rates Modeled You can update the heading for the weekday chart of the module for customers that have rates modeled as needed. **Default:** "Your average <fuel type> spending on **weekdays**".	**Optional** Choose one of the following: Use the default heading. Use the following heading:
Heading Weekdays Usage Version You can update the heading for the weekday chart of the module for customers that receive the usage version as needed. **Default:** "Your average <fuel type> use on **weekdays**".	**Optional** Choose one of the following: Use the default heading. Use the following heading:
Heading Weekends Rates Modeled You can update the heading for the weekend chart of the module for customers that have rates modeled as needed. **Default:** "Your average spending on **weekends**".	**Optional** Choose one of the following: Use the default heading. Use the following heading:

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Configuration Options	Input Value
Heading Weekends Usage Version You can update the heading for the weekend chart of the module for customers that receive the usage as needed. **Default:** "Your average use on **weekends**".	**Optional** Choose one of the following: Use the default heading. Use the following heading:
Explore Your Energy Spending or Usage Button You can update the text on this button, as well as the URL to which the customer is directed when clicking the button. **Defaults:** • Rates Modeled: "Explore your energy spending" • Usage Version: "Explore your usage details" You must also specify the URL the customer should link to when clicking the button.	**Required** Choose one of the following: Use the default button text. Use the following button text: Use this URL:

Load Shifting Insights for High Bill Alerts AMI

You can also include load shifting insights in your High Bill Alert (AMI) emails. For additional details, see Load Shifting High Bill Alert Emails.

Weather Insights Module

The Weather Insight module educates customers on how changes in temperature can affect their energy use. It also provides a comparison between the current month's average temperature and the average temperature from the same month of the previous year.

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Design

This image shows an example of the Weather Insights module.

Warmer weather may have affected your energy use

Energy use tends to be higher on warmer days. On average, this month was 9°F hotter than the same time 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.

Configuration Options	Input Value
Heading The default heading of the module varies depending on the state. These are the default headings by state: • **Cooler:** Colder weather may have affected your energy use • **Warmer:** Warmer weather may have affected your energy use • **Neutral:** What caused your bill to change?	**Optional** Choose one of the following: Use the default headings. Use the following headings:

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Configuration Options	Input Value
Weather Insight Statement The default weather insight statement varies depending on the state. These are the default headings by state: • **Cooler:** Energy use tends to be higher on colder days. On average, this month was <temp> cooler than the same time last year. • **Warmer:** Energy use tends to be higher on warmer days. On average, this month was <temp> hotter than the same time last year. • **Neutral:**Factors like heavy appliance use or household guests may have contributed. The weather has been similar to this time last year and may not have affected your bill.	**Optional** Choose one of the following: Display zero decimal places. (Default) Display this many decimal places:
Temperature Threshold The weather insight identifies weather as potentially impacting a customer's energy use when the temperature difference for the same time last year is greater than a defined threshold. **Default:** 8 degrees Fahrenheit	**Optional** Choose one of the following: Use the default temperature threshold. Use the following temperature threshold value:

Ways To Save Module

The Ways to Save module provides energy and water saving tips to encourage customers to take action to lower their bill before the end of the billing period. The module can display up to three tips. Customers can click **See More Ways to Save** to view more tips in the Oracle Utilities Opower Digital Self Service - Energy Management.

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Design

This image shows an example of the Ways to Save module.

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Top recommended tips for you

Schedule a free, virtual home energy assessment

Save money and reduce energy usage with the free, online HomeIntel Savings Program. Enroll now at join.hea.com to start seeing the benefits and save an average of $350 this year.

Install efficient showerheads

Showering accounts for up to 40% of your home's hot water use. Installing an energy-efficient showerhead can help reduce hot water use without compromising water pressure.

Save up to $100 per year

Set your thermostat to 68°F in the winter, health permitting

Heating accounts for most of your winter energy use. Save energy and money by setting your thermostat to 68°F when at home and lowering the temperature by 5-8°F when away, health permitting.

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Configuration Options

Configuration of tip content varies for each tip. Contact Your Delivery Team to discuss options for configuring tip content.

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 Options	Input Value
Number of Tips to Display The number of tips to display within the module, which can be set to 1, 2, or 3 tips. **Default**: 3	**Optional** Choose one of the following: Use the default. Display the following number of tips:

Marketing Module

A marketing module can appear either directly below the header or in the slot between the High Usage Period module and the footer. The marketing module can be used to promote a utility program, such as redirecting customers to the Oracle Utilities web portal or advertising a utility-specific rebate or discount.

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

Home Energy Analysis Module

The Home Energy Analysis modules prompt the customer to answer simple questions about their home attributes and energy habits to improve their report experience. The type of module the customer receives is configurable.

- **Mini Home Energy Analysis** (default): The Mini Home Energy Analysis prompts the customer to answer simple questions about their home attributes and energy habits from within the report.
- **Easy Open Home Energy Analysis**: The Easy Open Home Energy Analysis encourages customers to complete the Home Energy Analysis in order to improve their report experience, and includes a call to action button that redirects the customer to the Home Energy Analysis in Digital Self Service - Energy Management where they can complete the full survey.

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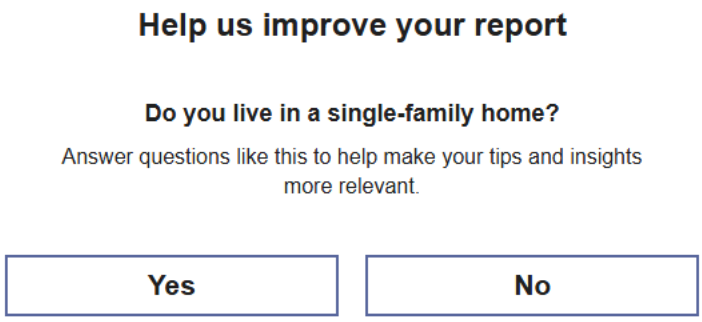
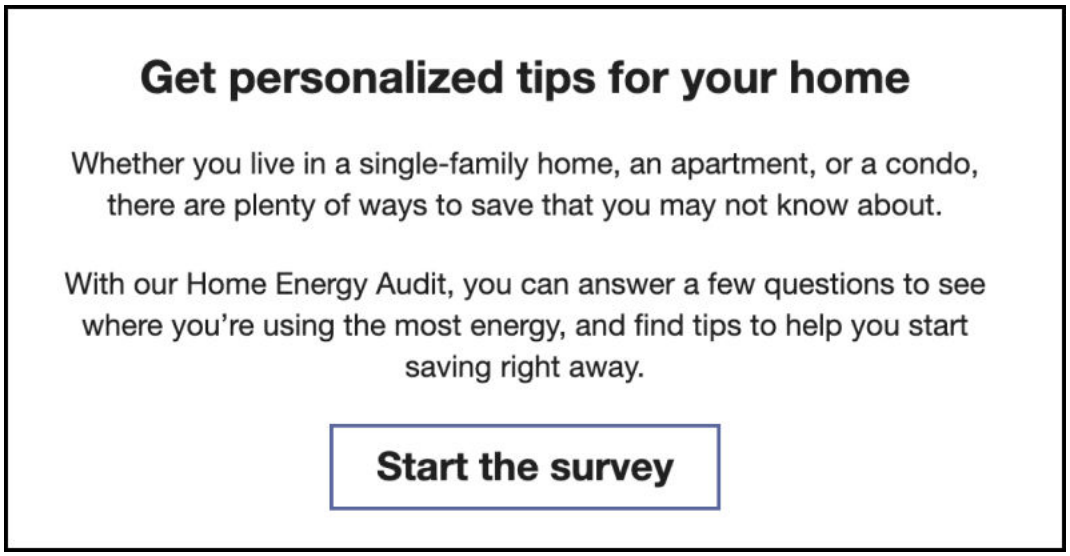
Design

The default experience for the Home Energy Analysis is the Mini Home Energy Analysis, which is shown below.



This image shows an example of the Easy Open module configuration option.



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.

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Configuration Options	Input Value
Hide the Home Energy Analysis Module The Home Energy Analysis module can be hidden from High Bill Alerts AMI v3. **Default**: Include the Home Energy Analysis module in High Bill Alerts AMI v3.	**Required** Choose one of the following: Include the Home Energy Analysis module (default). Hide the Home Energy Analysis module.
Design Option The Home Energy Analysis supports a Mini Home Energy Analysis and Easy Open Home Energy Analysis experience. **Default:** Mini Home Energy Analysis	**Required** Choose one of the following: Use the Mini Home Energy Analysis (default). Use the Easy Open Home Energy Analysis.

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Configuration Options	Input Value
Start The Survey Button (Easy Open) If the Easy Open experience is configured, you can update the text on this button, as well as the URL to which the customer is directed when clicking the button. **Default:** Start the survey You must also specify the URL the customer should link to when clicking the button.	**Optional** Choose one of the following: Use the default button text. Use the following button text: Use this URL:

User Feedback Module

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

Design

This image provides an example of the User Feedback module.

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.

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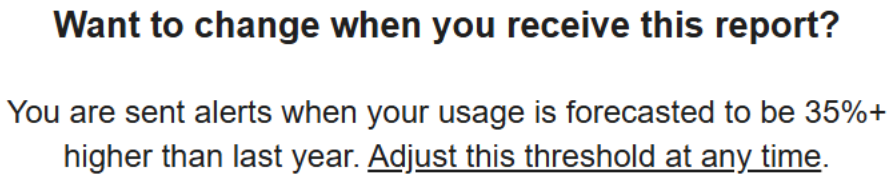
Configuration Options	Input Value
Question Type The perspective of the question can be set to one of three options, while the default usefulness question type is recommended. The other options include satisfaction, which asks users to rate how satisfied they are with the email, and interest, which asks users to rate how interested they are in viewing their next email. **Default**: Usefulness, which prompts users to rate how useful the message is.	**Optional** Choose one of the following: Use the default. Use the following question type:

Personal Threshold Module

The Personal Threshold module explains the customers current personal threshold and how it impacts receiving High Bill Alerts. Along with this explanation, it enables customers to access and update their threshold.

Design

This image shows an example of the Personal Threshold module:



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.

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Configuration Options	Input Value
Utility-Wide Default Threshold Value If the utility-wide threshold is turned on, and a customer does not set a personalized threshold, they will only receive reports when their forecast exceeds the default threshold. **Default:** 30%	**Optional** Choose one of these options: Use a 30% threshold. (Default) Use this threshold value:

Footer Module

The footer appears at the bottom of an email, and provides necessary information and links to manage preferences or unsubscribe from the email channel.

Design

This image shows an example of the Footer module.

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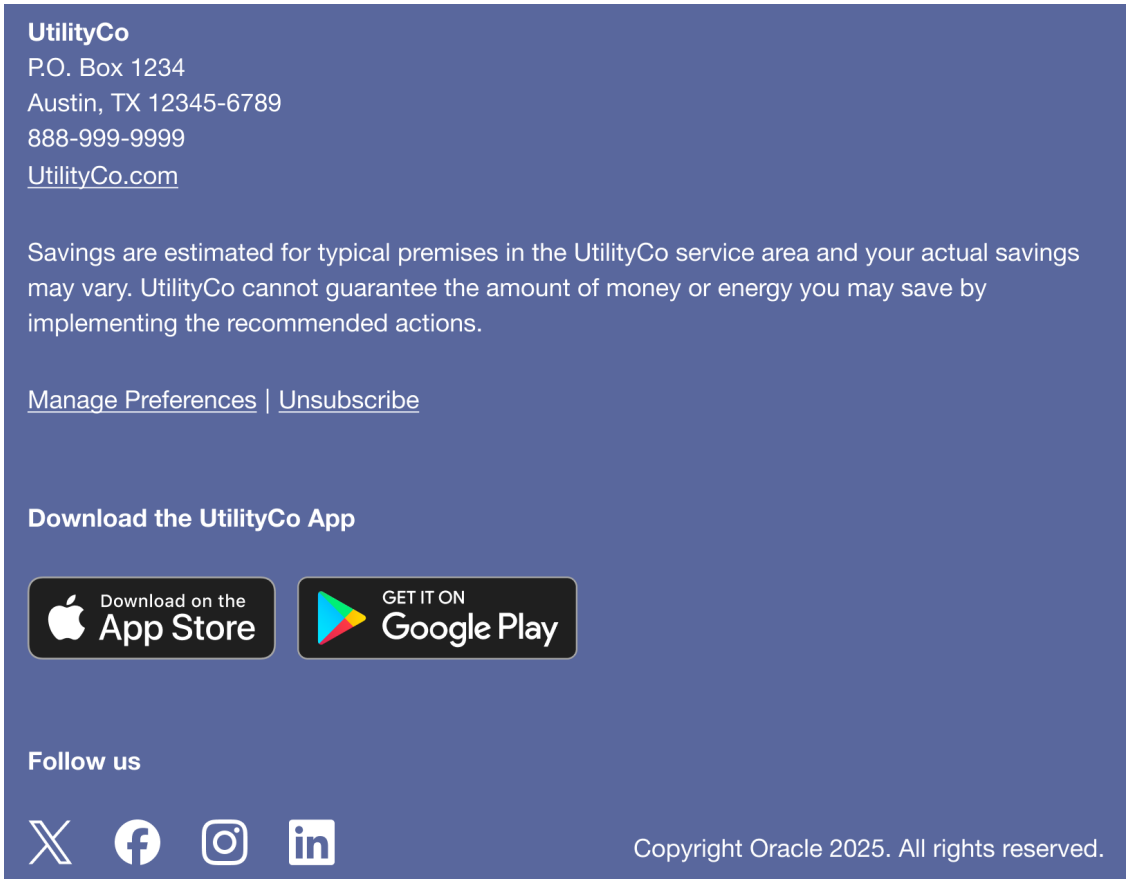

Configuration Options

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 Options	Input Value
Unsubscribe URL Utilities must provide the URL where customers are directed to if they want to unsubscribe from the emails.	**Required** Specify the URL:
Unsubscribe Link Text You can specify the text associated with the unsubscribe link. **Default:** Unsubscribe from these emails	**Optional** Choose one of the following: Use the default text. Use this text:

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Configuration Options	Input Value
Manage Preference Link Provide a link to a web page where a customer can edit their communication preferences. **Default:** If your program includes a standalone version of the Oracle Utilities Opower web portal, then by default the link points to the appropriate account management web page that comes with the product. If your program includes embedded web widgets, then by default the link points to the Digital Self Service Account Center widget.	**Required** Choose one of the following: Use the default Manage Preferences link. Do not include a Manage Preferences link. Work with your Delivery Team to use a different link.
Utility Name and Address The utility's name and mailing address must appear due to CAN-SPAM regulations in the US and similar regulations abroad.	**Required** Specify the name and address to use in the email footer:
Legal Text This is the copyright and any other legal text required by the utility and/or Oracle Utilities.	**Required** Use the following legal text in the email footer:
Disclaimer Text This is any additional text required by the utility and/or Oracle Utilities. Disclaimer text appears below the copyright text. Adding a disclaimer is optional.	**Optional** Use the following disclaimer text in the email footer:

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Text Alerts

SMS High Bill Alerts AMI are text messages sent through the mobile channel to inform customers when they are on track for a high bill or high energy use. SMS alerts are only delivered if the SMS alert type is turned on in a customer's account settings, and if the customer meets the minimum eligibility criteria to receive the SMS alert type. A dual fuel customer, which includes customers that receive electricity along with either gas or water, receives a single, combined fuel text message.

Design

The following message shows the standard wording of the High Bill Alert AMI text message when a customer's rates are modeled.

<utility name>: Based on your energy use, your next bill is projected to be around **<cost>**. Reply STOP to optout or HELP for info.

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
Utility Name Both the name itself and the name length are configurable up to 45 characters. Four characters or less is recommended. **Note:** SMS scripts are designed with character number requirements (160 maximum) in mind to ensure that they fit within a single message. It is strongly recommended that a short utility name of four characters or less is used to ensure that alerts stay within a single message.	**Required** Provide the utility name to include in text alerts.
Budget Billing Personal Threshold Not Set The message displayed for the user experience. The utility name and usage percentage are dynamically provided. **Default:** UTILCO: Based on your energy use, your next bill is projected to be 38% higher than the same time last year. Reply STOP to optout or HELP for info.	**Optional** Choose one of the following: Use the default message. Use this message:

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Configuration Option	Input Value
Budget Billing Personal Threshold Set The message displayed for the user experience. The utility name and usage percentage are dynamically provided. **Default:** UTILCO: Based on your energy use, your next bill is projected to be 38% higher than the same time last year. Reply STOP to optout or HELP for info.	**Optional** Choose one of the following: Use the default message. Use this message:
Budget Billing Personal Threshold Not Available The message displayed for the user experience. The utility name and usage percentage are dynamically provided. **Default:** UTILCO: Based on your energy use, your next bill is projected to be 38% higher than the same time last year. Reply STOP to optout or HELP for info.	**Optional** Choose one of the following: Use the default message. Use this message:
Usage Only Personal Threshold Not Set The message displayed for the user experience. The utility name and usage percentage are dynamically provided. **Default:** UTILCO: Based on your energy use, your next bill is projected to be 38% higher than the same time last year. Reply STOP to optout or HELP for info.	**Optional** Choose one of the following: Use the default message. Use this message:

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Configuration Option	Input Value
Usage Only Personal Threshold Set The message displayed for the user experience. The utility name and usage percentage are dynamically provided. **Default:** UTILCO: Based on your energy use, your next bill is projected to be 38% higher than the same time last year. Reply STOP to optout or HELP for info.	**Optional** Choose one of the following: Use the default message. Use this message:
Usage Only Personal Threshold Not Available The message displayed for the user experience. The utility name and usage percentage are dynamically provided. **Default:** UTILCO: Based on your energy use, your next bill is projected to be 38% higher than the same time last year. Reply STOP to optout or HELP for info.	**Optional** Choose one of the following: Use the default message. Use this message:
Rates Modeled Personal Threshold Not Set The message displayed for the user experience. The utility name and cost are dynamically provided. **Default:** UTILCO: Based on your energy use, your next bill is projected to be around $103. Reply STOP to optout or HELP for info.	**Optional** Choose one of the following: Use the default message. Use this message:

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Configuration Option	Input Value
Rates Modeled Personal Threshold Set The message displayed for the user experience. The utility name and cost are dynamically provided. **Default:** UTILCO: Based on your energy use, your next bill is projected to be around $103. Reply STOP to optout or HELP for info.	**Optional** Choose one of the following: Use the default message. Use this message:
Rates Modeled Personal Threshold Not Available The message displayed for the user experience. The utility name and cost are dynamically provided. **Default:** UTILCO: Based on your energy use, your next bill is projected to be around $103. Reply STOP to optout or HELP for info.	**Optional** Choose one of the following: Use the default message. Use this message:

Voice Alerts

Interactive Voice Response High Bill Alerts AMI are digital voice messages sent through the telephone channel to inform customers when they are on track for a high bill or high energy use. Voice alerts are only delivered if the voice alert type is turned on in a customer's account settings, and if the customer meets the minimum eligibility criteria to receive the voice alert type. While listening to a voice alert, a customer can press appropriate numbers on their phone to repeat the message or to unsubscribe from the messages. The major components of the voice alert are described below.

Design

The following script shows the standard wording of the High Bill Alert AMI voice message when a customer's rates are modeled.

*Hello, this is an account alert from **<utility name>**. Based on your energy use, your next bill is projected to be around **<cost>**. There's still time to save! Visit our website at **<website>** for energy-saving tips that can help lower your bill. To hear this message again, press 1. To stop receiving these alerts, press 9. Thank you for being a valued customer. Goodbye.*

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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
From Number This must be configured in the third-party vendor system for voice High Bill Alert AMI voice messages.	**Required** Provide the from phone number.
Utility Name Both the name itself and the name length are configurable up to 45 characters. Twenty-three characters or less is recommended.	**Required** Provide the utility name to include in the voice alert.
Utility Website Link The link to the website mentioned in the message. It is recommended to provide the link in a manner that can be understood in a voice message.	**Required** Provide the utility website link to include in the voice alert.
Delivery Window The delivery window refers to the days in the month during which High Bill Alert AMI voice messages can be sent to customers. **Default:** The default window for sending messages is seven days after a new bill period starts and seven days before the bill period ends.	**Required** Specify one of the following: • Default • Other window:
Budget Billing Personal Threshold Not Set The script used for the user experience. The utility name, usage percentage, and website are dynamically provided. **Default:** Hello, this is an account alert from UTILCO. Based on your energy use, your next bill is projected to be 83% higher than it was this time last year. It's not too late to save! Visit our website at www.UtilityCo.com for energy-saving tips and insights that can help lower your energy use - and your bills. To hear this message again, press 1. To stop receiving these alerts, press 9. Thank you for being a valued customer. Goodbye.	**Optional** Choose one of the following: Use the default script. Use this script:

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Configuration Option	Input Value
Budget Billing Personal Threshold Set The script used for the user experience. The utility name, usage percentage, and website are dynamically provided. **Default:** Hello, this is an account alert from UTILCO. Based on your energy use, your next bill is projected to be 83% higher than it was this time last year. It's not too late to save! Visit our website at www.UtilityCo.com for energy-saving tips and insights that can help lower your energy use - and your bills. To hear this message again, press 1. To stop receiving these alerts, press 9. Thank you for being a valued customer. Goodbye.	**Optional** Choose one of the following: Use the default script. Use this script:
Budget Billing Personal Threshold Not Available The script used for the user experience. The utility name, usage percentage, and website are dynamically provided. **Default:** Hello, this is an account alert from UTILCO. Based on your energy use, your next bill is projected to be 83% higher than it was this time last year. It's not too late to save! Visit our website at www.UtilityCo.com for energy-saving tips and insights that can help lower your energy use - and your bills. To hear this message again, press 1. To stop receiving these alerts, press 9. Thank you for being a valued customer. Goodbye.	**Optional** Choose one of the following: Use the default script. Use this script:
Usage Only Personal Threshold Not Set The script used for the user experience. The utility name, usage percentage, and website are dynamically provided. **Default:** Hello, this is an account alert from UTILCO. Based on your energy use, your next bill is projected to be 83% higher than it was this time last year. It's not too late to save! Visit our website at www.UtilityCo.com for energy-saving tips and insights that can help lower your energy use - and your bills. To hear this message again, press 1. To stop receiving these alerts, press 9. Thank you for being a valued customer. Goodbye.	**Optional** Choose one of the following: Use the default script. Use this script:

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Configuration Option	Input Value
Usage Only Personal Threshold Set The script used for the user experience. The utility name, usage percentage, and website are dynamically provided. **Default:** Hello, this is an account alert from UTILCO. Based on your energy use, your next bill is projected to be 83% higher than it was this time last year. It's not too late to save! Visit our website at www.UtilityCo.com for energy-saving tips and insights that can help lower your energy use - and your bills. To hear this message again, press 1. To stop receiving these alerts, press 9. Thank you for being a valued customer. Goodbye.	**Optional** Choose one of the following: Use the default script. Use this script:
Usage Only Personal Threshold Not Available The script used for the user experience. The utility name, usage percentage, and website are dynamically provided. **Default:** Hello, this is an account alert from UTILCO. Based on your energy use, your next bill is projected to be 83% higher than it was this time last year. It's not too late to save! Visit our website at www.UtilityCo.com for energy-saving tips and insights that can help lower your energy use - and your bills. To hear this message again, press 1. To stop receiving these alerts, press 9. Thank you for being a valued customer. Goodbye.	**Optional** Choose one of the following: Use the default script. Use this script:
Rates Modeled Personal Threshold Not Set The script used for the user experience. The utility name, usage costs, and website are dynamically provided. **Default:** Hello, this is an account alert from UTILCO. Based on your energy use, your next bill is projected to be around $103. There's still time to save! Visit our website at www.UtilityCo.com for energy-saving tips that can help lower your bill. To hear this message again, press 1. To stop receiving these alerts, press 9. Thank you for being a valued customer. Goodbye.	**Optional** Choose one of the following: Use the default script. Use this script:

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Configuration Option	Input Value
Rates Modeled Personal Threshold Set The script used for the user experience. The utility name, usage costs, and website are dynamically provided. **Default:** Hello, this is an account alert from UTILCO. Based on your energy use, your next bill is projected to be around $103. There's still time to save! Visit our website at www.UtilityCo.com for energy-saving tips that can help lower your bill. To hear this message again, press 1. To stop receiving these alerts, press 9. Thank you for being a valued customer. Goodbye.	**Optional** Choose one of the following: Use the default script. Use this script:
Rates Modeled Personal Threshold Not Available The script used for the user experience. The utility name, usage costs, and website are dynamically provided. **Default:** Hello, this is an account alert from UTILCO. Based on your energy use, your next bill is projected to be around $103. There's still time to save! Visit our website at www.UtilityCo.com for energy-saving tips that can help lower your bill. To hear this message again, press 1. To stop receiving these alerts, press 9. Thank you for being a valued customer. Goodbye.	**Optional** Choose one of the following: Use the default script. Use this script:

Mobile Push Alerts

High Bill Alert AMI mobile push alerts enable utility customers who have the utility's mobile application to receive in-application alerts regarding a potentially high bill. The alert notifies customers of what their projected upcoming bill is based on their usage so far in the billing period. The alerts are intended to provide customers with enough time to respond to the alert so that they have the opportunity to lower their bill.

Design

The following message shows the standard wording of the High Bill Alert AMI mobile push message when a customer's rates are modeled.

Util: You're trending toward a higher bill. Let's look at ways to cut back on energy spending so you can get back on track for lower bills.

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.

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Configuration Option	Input Value
Utility Name The alert message can begin with the utility company name.	**Required** Provide the utility name to include in the alert.
Budget Billing Personal Threshold Not Set The message displayed for the user experience. The utility name and usage percentage are dynamically provided. **Default:** Util: Your energy use is 83% higher than usual. Let's look at ways to cut back on energy spending so you can get back on track for lower bills.	**Optional** Choose one of the following: Use the default message. Use this message:
Budget Billing Personal Threshold Set The message displayed for the user experience. The utility name and usage percentage are dynamically provided. **Default:** Util: Your energy use is 83% higher than usual. Let's look at ways to cut back on energy spending so you can get back on track for lower bills.	**Optional** Choose one of the following: Use the default message. Use this message:
Budget Billing Personal Threshold Not Available The message displayed for the user experience. The utility name and usage percentage are dynamically provided. **Default:** Util: Your energy use is 83% higher than usual. Let's look at ways to cut back on energy spending so you can get back on track for lower bills.	**Optional** Choose one of the following: Use the default message. Use this message:

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Configuration Option	Input Value
Usage Only Personal Threshold Not Set The message displayed for the user experience. The utility name and usage percentage are dynamically provided. **Default:** Util: Your energy use is 83% higher than usual. Let's look at ways to cut back on energy spending so you can get back on track for lower bills.	**Optional** Choose one of the following: Use the default message. Use this message:
Usage Only Personal Threshold Set The message displayed for the user experience. The utility name and usage percentage are dynamically provided. **Default:** Util: Your energy use is 83% higher than usual. Let's look at ways to cut back on energy spending so you can get back on track for lower bills.	**Optional** Choose one of the following: Use the default message. Use this message:
Usage Only Personal Threshold Not Available The message displayed for the user experience. The utility name and usage percentage are dynamically provided. **Default:** Util: Your energy use is 83% higher than usual. Let's look at ways to cut back on energy spending so you can get back on track for lower bills.	**Optional** Choose one of the following: Use the default message. Use this message:

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Configuration Option	Input Value
Rates Modeled Personal Threshold Not Set The message displayed for the user experience. The utility name is dynamically provided. **Default:** Util: You're trending toward a higher bill. Let's look at ways to cut back on energy spending so you can get back on track for lower bills.	**Optional** Choose one of the following: Use the default message. Use this message:
Rates Modeled Personal Threshold Set The message displayed for the user experience. The utility name is dynamically provided. **Default:** Util: You're trending toward a higher bill. Let's look at ways to cut back on energy spending so you can get back on track for lower bills.	**Optional** Choose one of the following: Use the default message. Use this message:
Rates Modeled Personal Threshold Not Available The message displayed for the user experience. The utility name is dynamically provided. **Default:** Util: You're trending toward a higher bill. Let's look at ways to cut back on energy spending so you can get back on track for lower bills.	**Optional** Choose one of the following: Use the default message. Use this message:

Load Shifting High Bill Alert Emails

This section discusses the design, configuration options, and the user experience variations that are specific to the modules that are used to include load shifting insights in the High Bill Alert AMI emails. These modules are designed to educate HBA AMI customers about their time of use (TOU) or demand rate plans, and encourage them to shift energy use to off-peak hours.

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Be aware that at least two peak categories must be set up in order for load shifting modules to display correctly. For example, a utility might have PEAK hours from 6am to 12am, and OFF-PEAK hours from 12am to 6am.

TOU Rate Plans

For customers on TOU rate plans, load shifting insights can be included within the HBA AMI email communications using this module:

- TOU Trends Module: This is a simplified module that displays the cost or usage during each peak period.

Demand Rate Plans

For customers on Demand rate plans, load shifting insights can be added to the HBA AMI email communication using the following modules:

- TOU Trends Module
- TOU Demand Reminder Module

TOU Demand Reminder Module

The TOU Demand Reminder module is used to educate customers about how their demand charge is calculated. The module provides customers with information such as:

- How much more expensive peak prices are than o□-peak prices.
- The hours during which electricity is most expensive.
- A visual timeline that displays o□-peak, partial-peak, and peak hours.
- An explanation of how the demand charge is calculated.

Design

This image shows an example of the TOU Demand Reminder Module

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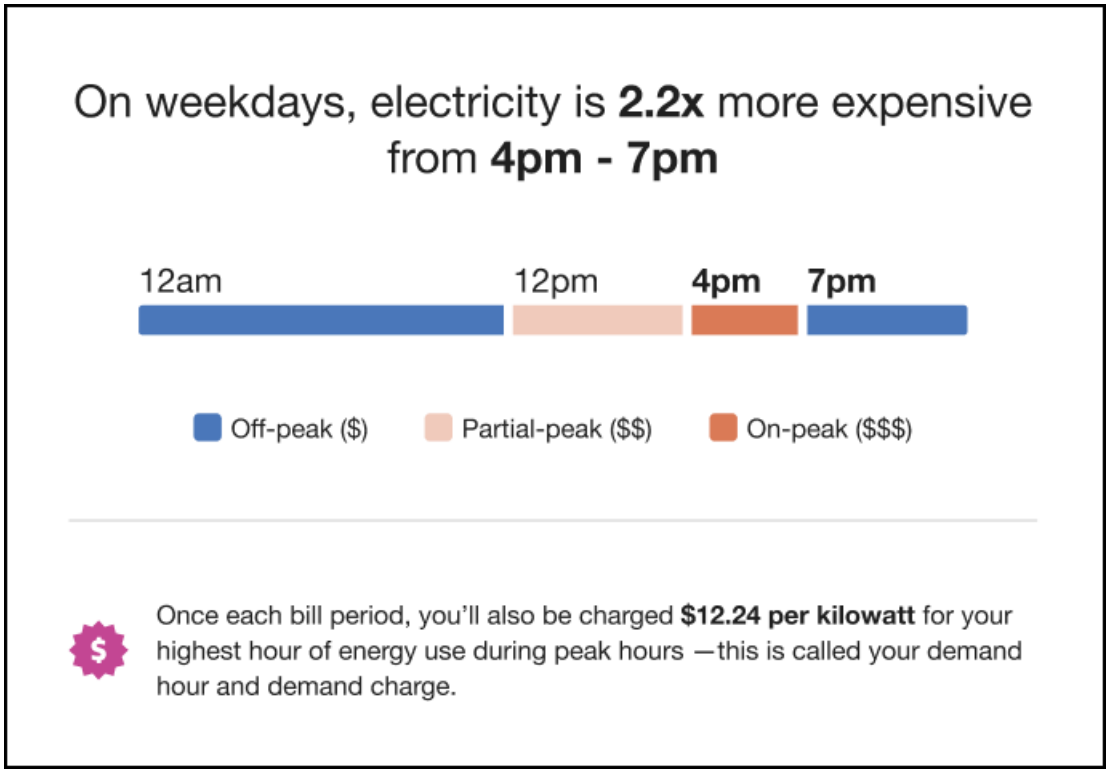

Configuration Options

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
Color and Chart Alignment Oracle strongly recommends that the charts for this module use the same colors as other load shifting modules that include charts. Using the same color shows the customer the visual connection between each hour's price and the customer's use during each hour.	**Required** Choose one of the following: Use default colors. Work with your Delivery Team to specify other colors.
Peak Time Price Ratio in Insight Statement The introduction statement can include a price ratio that indicates how much more expensive electricity is during peak hours. For example, "Electricity is 2.2x more expensive during peak hours". By default, the value is automatically calculated based on the rate plan details received from the client. However, this value can be manually entered, or it can be excluded from the statement.	**Required** Choose one of the following: Use the ratio from the rate plan. Use the following ratio: Exclude ratio from the statement.

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Configuration Option	Input Value
Peak Time Names You can designate the name of peak and off-peak ranges on the bar chart, including how many dollar signs ($) appear for each. You can also specify the name of the peak period that is used in the Demand Charge Statement. Dollar signs do not appear in this statement. Default values include: • Off-peak periods: Off-peak ($) • On-peak periods: On-Peak ($$$) • Partial-peak periods: Partial-peak ($$) The values used here should be the same as the values in all other Load Shifting Rate Coach modules that display the peak time names.	**Required** Choose one of the following: Use the default names. Use the following names:

TOU Trends Module

This module is used in High Bill Alert (HBA) emails for customers on time-of-use plans. The module shows customers what portion of their energy use occurs during on-peak periods, provides details about the cost of energy use during peak periods, displays usage charts for weekdays and weekends, and encourages them to shift their energy usage to off-peak hours.

> **Note**
>
> - This section describes only the TOU Trends module and does not cover additional modules that are delivered within the High Bill Alert AMI Email communication.

Design

This image shows an example of the module:

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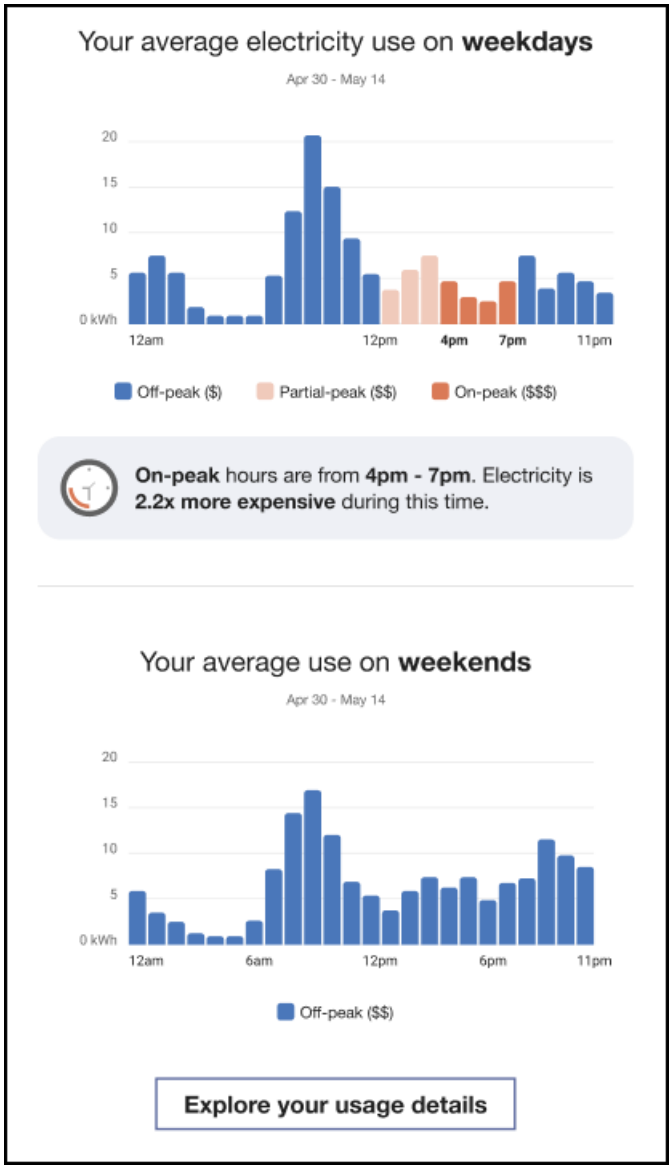

Configuration Options

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
Color in Graphic By default, the color of the clock graphic is set to use the utility's On Peak color.	**Optional** Choose one of the following: • Use the default color. • Work with your Delivery Team to specify other colors.
Low Usage Threshold If the customer only has a small percentage of their usage during peak hours, the module is adjusted to remove some peak hour information. By default, the threshold is set to 0.05 (5%).	**Optional** Choose one of the following: • Use the default threshold. • Use this threshold:

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Configuration Option	Input Value
Chart Legend Indicators You can specify whether to include the dollar sign indicators next to the peak period names in the legend. The indicators are included by default using the **Config Show Legend TOU Period Dollar Signs** configuration. For example: • Off-peak ($) • Partial-peak ($$) • On-peak ($$$)	**Optional** Choose one of the following: • Display the indicators. • Do not display the indicators.
Chart Legend Labels You can specify whether to include labels under each item in the chart legend. The labels are included by default using the **Config Show Legend TOU Period Sub-Label** configuration. For example: • Lower costs • Medium costs • Higher costs	**Optional** Choose one of the following: • Display the labels. • Do not display the labels.
Show Weekend Chart Separately You can configure the charts to display weekday and weekend days as two separate charts, or to combine the days into a single chart. You can not combine the charts if the TOU periods are different on weekdays and weekends. By default, the charts are set to display separately.	**Optional** Choose one of the following: • Display separate charts. • Do not display separate charts.

User Experience Variations

This section discusses the user experience variations in the TOU Trends module.

Usage Variations

The usage version of the module varies from the cost version as follows:

Weekday Bar Chart: The chart depicts the average weekday electricity usage during each hour of the day. The different peak periods are color coded, and described in the legend below the chart, to enable readers to easily identify when they are using the most electricity.

Weekend Bar Chart: The chart depicts the average weekend electricity usage during each hour of the day. Utilities typically do not have peak periods on weekends, therefore, this chart is typically shown in a single color with a legend below. The data helps readers understand when they are using energy on the weekends.

Tiered TOU Plans

For tiered TOU plans, the module varies in the following way:

Insight Statement: This statement explains how much more expensive energy is during peak hours compared to off-peak hours. The tier with the highest cost ratio is used when calculating the price ratio in the statement, which might say, "On-peak hours are from 4pm - 7pm. Electricity is up to 2.2x more expensive during this time."

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TOU Hours the Same on Weekdays and Weekends

If TOU hours are the same during weekdays and weekends, only one chart is included in the module. The chart encompasses both weekdays and weekend days, and the date range reflects the full date range.

The header is changed as follows for cost variations:

- **Header for Cost Variations:** "Your average hourly cost"
- **Header for Usage Variations:** "Your average hourly usage"

Holiday Variation

When a holiday is included in the time period, the module is updated as follows for cost variations:

Chart titles: "Your average <weekend or weekday> and holiday spending"

The module is updated as follows for usage variations:

Chart titles: "Your average <weekend or weekday> and holiday usage"

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3 Delivery

High Bill Alert AMI messages are not regularly-scheduled communications. They are triggered based on specific criteria. For example, an alert is triggered when a customer reaches a certain percentage of usage above their typical baseline. The messages must be delivered within a particular delivery window. The rules that govern alert delivery follow.

Waking Hours: High Bill Alert AMI messages 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.

Days of the Week: High Bill Alert AMI messages can be delivered on weekdays or weekends during waking hours.

Non-Delivery Window: High Bill Alert AMI messages cannot be delivered during the configured non-delivery window, which is during the specified number of days after bill period starts and before a bill period ends. The purpose of the non-delivery window is to ensure customers do not receive an alert too soon after their bill period starts, or too late in the bill period to be useful.

The default non-delivery window settings specify that alerts should not be delivered within seven days after a new bill period starts or within seven days before the bill period ends. These settings are configurable as part of the voice channel configuration, but apply to all channels used for High Bill Alert AMI communications.

For example, suppose a customer is billed on the third day of every month. For the July 3rd bill, using the default delivery settings, Oracle Utilities could send an alert anytime between June 10th (seven days after the bill period starts) and June 26th (seven days before the bill period ends).

Delivery Frequency: High Bill Alert AMI messages are limited to being sent once per billing period per service point to avoid excessive alerting.

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

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

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4 FAQs

This section offers answers to frequently asked questions (FAQs) about the High Bill Alert AMI design options.

What was the design goal for High Bill Alert AMI communications?

The goal was to create a very simple alert to allow for the quick comprehension of information, and to use simple visual indicators and messaging to motivate customers to take action resulting in less energy use and a lower bill. Through the wording and visual appearance of the alerts, we catch the user's attention without being too vague or too negative.

What are some of the design principles we use in voice alerts?

Several of the principles we employ are as follows:

- Identify the caller (the utility) clearly.
- Strive for a voice that is clear, strong, and friendly.
- Avoid poor sound quality and long pauses, as these increase the likelihood of a hang up.
- Keep the message to 30 seconds or less. Good scripts are brief, clear, and to the point while avoiding terseness.
- Use wording that clearly conveys to callers that they are interacting with a computer and not a human. (People dislike voice systems that pretend to be a person, or that get too familiar.)

Will customers receive more than one SMS message?

The most common user experience is a single SMS message per alert. SMS scripts are designed with character number requirements in mind to ensure that they fit within a single message. However, if the utility alters the script in a way that exceeds the 160 character count maximum, the alert will be split between two separate messages.

How do customers opt out of High Bill Alert AMI Emails?

The High Bill Alert AMI email unsubscribe process meets the requirements of a one-click unsubscribe. If customers would like to opt out, they can do so by clicking Unsubscribe in the email footer.

Customers might also have the option to change their communication preferences from the utility web portal. Customer Service Representatives can also unsubscribe customers over the phone.

Note: When a customer uses the Unsubscribe link to unsubscribe from High Bill Alert AMI email, the customer will be removed from all Oracle Utilities Opower email communications.

If a customer opts out of their utility communications, will they still receive High Bill Alert AMI communications?

Not necessarily. The High Bill Alert AMI program opt-out policy is largely dependent on the digital communication policy set by each utility. Discuss your digital communication policy and its impact on your High Bill Alert AMI program with your Client Success Manager.

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How can I prepare my Customer Service Representatives for calls related to High Bill Alert AMI messages?

Your customer service representatives will receive the Oracle Utilities Opower customer service guides for the products corresponding to your Oracle Utilities Opower program. The guides provides conceptual and procedural information on how Oracle Utilities Opower products work, how to perform basic tasks within the products, and how to respond to customer inquiries.

Is there a limit on the size of a URL?

Short URLs fit better in our communications and they make it easier for a customer to remember the name. Eliminating the prefix http://www. is an easy way to simplify the URL. While using http://www. used to be a standard naming practice, it is now a common convention for websites to omit this prefix.

Why do we recommend initial capitalization (camel case) for URLs and email addresses?

Eliminating spaces and capitalizing the first letter of every word (camel case) makes the text more readable. It also makes it easier for customers to type the URL and e-mail address without making errors. For example, you might use EnergyUsage instead of energy usage. Utilities using a UNIX-based web server must set up the file system to not be case sensitive. Windows filesystems are not case sensitive, so no extra configuration is required.

Is there a way to send out one alert that includes gas and electric usage information?

Yes. Customers with both electric and gas fuel types (dual fuel) can receive dual fuel High Bill Alert AMI communications. These communications enable customers to view both types of energy usage at once, and easily determine when their gas or electric usage in particular is high.

Can customers receive email alerts on more than one address?

Yes. If a customer has added multiple email addresses to their account, they can select to receive High Bill Alert AMI alerts on all of their included email addresses.

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5 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.

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6 Version

The table below is used to track the version of this document. Comments in the table indicate the latest state of the document. For example, the utility could comment "Sent draft to Oracle Utilities" or "Final Sign-off" when the completed version of this document is returned to the Service Delivery Manager for product configuration. Fill out the next row in the table with your name, today’s date, and a comment.

Name	Date	Comment

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Contact Your Delivery Team

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

To contact your Delivery Team:

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

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

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