Oracle Utilities Opower Proactive Alerts Cloud Service

High Bill Alerts (AMI) Configuration Guide

Latest Release

F14053-24

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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.

> **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 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 and requirements 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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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 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.

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 might look like for a customer.

UtilityCo

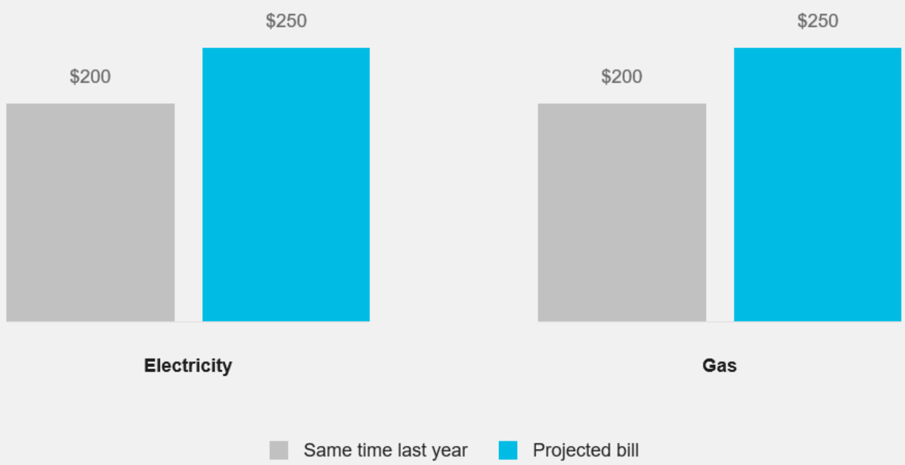
Sergei Poganshev Mr.
Acct # *****6789

Your bill is projected to be $250

That's higher than the high bill threshold you set.
Change your threshold

Electricity and gas breakdown

You're projected to spend more on electricity and gas than the same time last year.



When you use the most electricity

Think about what's using electricity in the morning.

	Mornings	**6am - 12pm**	**50%**
	Afternoons	12pm - 6pm	20%
	Evenings	6pm - 12am	20%
	Nights	12am - 6am	10%

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

Type of Email	Suggested Order of Modules
Electric-Only	1. Subject Lines and Header Module 2. Bill Forecast Module 3. Time of Day Module for customers who are not on a Time of Use (TOU) or demand rate plan, or Load Shifting Insights for customers on TOU or demand rate plans. Only one of these modules should be included in a message. 4. Weather Insights Module 5. Ways To Save Module 6. Marketing Module (optional) 7. Easy Open Module (optional) 8. User Feedback Module (optional) 9. Footer Module
Gas-Only	1. Subject Lines and Header Module 2. Bill Forecast Module 3. Time of Day Module 4. Weather Insights Module 5. Ways To Save Module 6. Marketing Module (optional) 7. Easy Open Module (optional) 8. User Feedback Module (optional) 9. Footer Module
Water-Only	1. Subject Lines and Header Module 2. Bill Forecast Module 3. Ways To Save Module 4. Marketing Module (optional) 5. User Feedback Module (optional) 6. Footer Module

Type of Email	Suggested Order of Modules
Combined Electric and Gas	1. Subject Lines and Header Module 2. Bill Forecast Module 3. Electric Gas Comparison 4. Time of Day Module for customers who are not on a Time of Use (TOU) or demand rate plan, or Load Shifting Insights for customers on TOU or demand rate plans. Only one of these modules should be included in a message. 5. Weather Insights Module 6. Ways To Save Module 7. Marketing Module (optional) 8. Easy Open Module (optional) 9. User Feedback Module (optional) 10. Footer Module
Combined Electric and Water	1. Subject Lines and Header Module 2. Bill Forecast Module 3. Multi-Service Comparison 4. Time of Day Module for customers who are not on a Time of Use (TOU) or demand rate plan, or Load Shifting Insights for customers on TOU or demand rate plans. Only one of these modules should be included in a message. 5. Weather Insights Module 6. Ways To Save Module 7. Marketing Module (optional) 8. Easy Open Module (optional) 9. User Feedback 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.

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:

Email-Wide User Experience Variations

This section discusses some common email-wide variations. Additional variations of the Email High Bill Alert AMI are possible, depending on the modules included, the order of the modules, and the variations of each module.

For details about how each module can vary, see the User Experience Variation sections that are included in each of the individual module topics.

Dual Fuel Email Alert

Dual fuel customers receive a single alert that includes details about both electricity and gas use. The dual fuel alert contains the same insights as the single fuel alert, as well as an electricity and gas comparison module that compares projected electricity and gas use to the customer's use for each fuel type from the same billing period of the previous year. A dual fuel customer will receive a high bill alert only when both fuels exceed either their personalized threshold (if set) or the default thresholds for both fuels as set by the utility.

Multi-Service Email Alert

Customers with water and electric service can receive a single alert that includes details about both electricity and water costs. The multi-service alert contains the same insights as the single service alert, as well as a multi-service comparison module that compares projected electricity and water costs to the customer's costs for each service from the same billing period of the previous year.

To include water information in alerts, utilities must have the Oracle Utilities Opower Digital Self Service - Transactions Cloud Service.

Usage Versus Cost

Cost information can be included in the High Bill Alerts AMI if a utility's rates have been modeled. This means that the cost of energy or resource use, and the calculators used to generate that cost, are modeled in the Oracle Utilities Opower system. As a result, the appearance of the alert changes to display the increase in use in terms of cost. For example, the forecast section shows the customer's projected *cost* for the billing period, instead of the customer's projected *use* percentage as compared to last year. Additionally, the messaging varies slightly to use the term *bill* instead of *usage*. If rates are not modeled, the alert displays projected use in terms of the applicable units of measure.

Budget Billing

Budget billing is a type of billing in which the customer pays a set amount of money each month for their bill. The utility will look at the amount the customer spent last year, add a percentage to this amount to cover the cost of inflation, and divide the amount over twelve months. Budget billing customers receive a message on the alert encouraging them to lower their usage since their costs may increase when their payment amount is adjusted. Budget billing customers can set a personalized threshold for usage.

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.

Design

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

Subject Line

"Alert: You are on track for a high bill of $240"

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 subject lines and Header module.

Subject Lines

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
Use On Track or Projected Bill Language The subject line can be configured to use "on track" language or "projected bill" language. **Default:** On track language	**Optional** Choose one of the following: Use on track language. (Default) Use projected bill language.

This table describes the default subject lines that are used for these emails:

Personal Threshold Setting	Rates Type	On Track Language	Projected Bill Language
Personal threshold not set or not available.	Cost	"You are on track for a high bill of <$X>"	"Your upcoming bill is projected to be <$X>"
Personal threshold not set or not available.	Usage or Budget Billing	"You are on track for a <X%> higher bill"	"Your upcoming bill is projected to have <X%> higher energy use"
Personal threshold set by customer.	Cost	"You are on track for a high bill of more than <$X>"	"Your upcoming bill is projected to be higher than <cost threshold amount>"
Personal threshold set by customer.	Usage or Budget Billing	"You are on track for a <X%> higher bill"	"Your upcoming bill is projected to have <X%> higher <energy/water> use"

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.
Include URL in Logo The utility can provide a URL that can be included within the logo to direct customers to a utility website.	**Optional** Choose one of these options: Do not include a URL. Include the following URL:

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:
Include Premise Address The premise address can be enabled to appear after the account number for customers with one or more premises. **Default:** Do not display premise address.	**Optional** Choose one of the following: Do not display premise address. (Default) Display premise address.

Configuration Options	Input Value
Include Reference Number A reference number can be enabled to appear after the account number. **Default:** Do not display reference number.	**Optional** Choose one of the following: Do not display reference number. (Default) Display reference number.

Bill Forecast Module

The Bill Forecast 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. The module can also include personalized threshold information, and can enable customers to access and update their threshold.

Design

This image shows an example of the Bill Forecast 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.

Configuration Options	Input Value
Rounding of Bill Forecast By default, the bill forecast rounds to the nearest whole dollar. The message can be configured to show two decimals places in the bill forecast. **Default:** Round to the nearest whole dollar.	**Optional** Choose one of these options: Round to the nearest whole dollar. (Default) Include 2 decimal places and do not round.
Bill Forecast Language The module can be configured to use on track or projected bill language, as follows: • "You are on track for a high bill of more than $[XX]." • "Your upcoming bill is projected to be higher than $[XX]." Note that this language choice is also available in the Subject Lines module. The same language should be used for both modules. **Default:** On track language	**Optional** Choose one of these options: Use on track language. (Default) Use projected bill language.

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 customer, your costs may increase in the future if you use more [fuel/ resource type] than usual.	**Optional** Choose one of these options: Use the default statement. Use the following statement:
Display Bill Period Date Range The billing period date range associated with the forecast can be set to display at the top of the Bill Forecast module. **Default:** Do not display.	**Optional** Choose one of these options: Do not display date range. (Default) Display date range.
Enable Range Specify whether the projected amount is displayed as a range rather than as a specific amount. **Default:** Display a single amount	**Optional** Choose one of these options: Display single amount. (Default) Display a range.

Configuration Options	Input Value
Turn Off Utility-Wide Threshold Utilities can turn off the utility-wide threshold. **Default:** Threshold is set to ON.	**Optional** Choose one of these options: Threshold is on. (Default) Threshold is off.
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:

User Experience Variations

This section describes the user experience variations in the Bill Forecast module.

Personal Threshold Not Set

When the utility has a default utility-wide threshold, but the customer has not yet set up their own personal threshold, the bill forecast message changes to include a prominent button with the text "CHANGE YOUR THRESHOLD" to prompt users to set their own personal threshold.

Personal Threshold Not Available

If the utility does not implement the personal threshold, all language regarding the customer's personal threshold, and all links or buttons directing customers to set or change the threshold are removed from the message.

Budget Billing

Budget billing customers receive a usage experience, which means their bill forecast statement uses percentage rather than dollar amounts. Additionally, a statement is added to the message telling the customer that if their usage is high, it could impact their future bills.

Usage

The message can provide a usage forecast rather than a forecasted amount. The usage forecast is shown as a percentage. For example, "Your energy use is projected to be 10% higher this billing period".

Projected Range

Utilities can display a forecast cost range rather than a specific cost value for the projected bill. If you choose to display a range, you do so by specify the range percentage. By default, the range is set to 0 (zero), and therefore, a range is not displayed. If you set the range to 15%, for example, and a customer's projected bill is $100, the range would display as $100-$115.

Display Billing Period Date Range

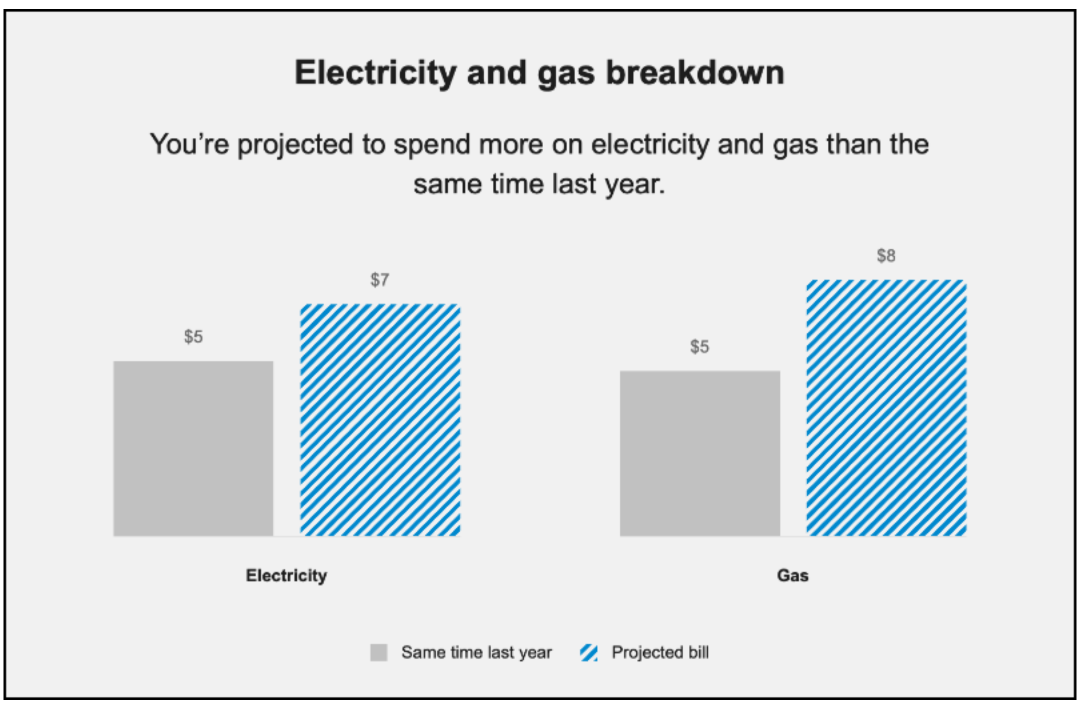
You can set the Bill Forecast module to display the bill period date range associated with the forecast. The date range appears at the top of the module when set to display. By default, the date range is not displayed.

Electric Gas Comparison Module

The Electric Gas Comparison module is included in the Email High Bill Alert AMI for customers who have both gas and electric service. The module includes two bar graphs. Each graph compares projected use to use from the same billing period of the previous year. One graph shows electricity use and the other shows gas use. If a customer has the cost view, a dollar amount is displayed above each graph bar. If the customer has the usage view, usage is displayed above each graph bar.

Design

This image shows an example of the 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.

Configuration Options	Input Value
Heading You can update the heading of the module. **Default:** "Electric and gas breakdown".	**Optional** Choose one of the following: Use the "Electric and gas breakdown" heading. (Default) Use the following heading:
Subheading You can configure the subheading in the module as necessary. **Default:** "You're projected to spend <more/less> on <fuel/resource> than the same time last year." For example, "You're projected to spend more on electricity and gas than the same time last year."	**Optional** Choose one of the following: Use the default subheading. Use the following heading:

Configuration Options	Input Value
Bar Chart Labels The labels below the bars in the chart can be updated. **Defaults:** • Electricity • Gas	**Optional** Choose one of the following: Use the default labels. Use the following labels:
Decimal Places You can configure the module to display up to two decimal places for the amounts above the bars. **Default:** Display zero decimal places.	**Optional** Choose one of the following: Display zero decimal places. (Default) Display this many decimal places:

Configuration Options	Input Value
Legend Labels The legend labels below the chart can be updated. **Defaults:** • Projected bill • Same time last year	**Optional** Choose one of the following: Use the default labels. Use the following labels:

User Experience Variations

This section describes the user experience variations in the Electric and Gas Comparison module.

Usage Version

If the customer receives a usage version of the email, this module shows usage instead of costs. Electricity is displayed in kWh, and gas is displayed in therms.

Subheading

The subheader changes based on whether a customer spends more or less than they did during the same period last year. The customer most have spent at least 10% more than the previous year to be considered "spending more" during the current bill period. This 10% threshold for the comparison states is not configurable. These subheader variations are possible:

- **Customers spends 10% more on both fuel types:** "You're projected to spend more on electricity and gas than the same time last year."
- **Customer spends 10% more on one fuel type, but not the other:** "You're projected to spend more on <fuel type> than the same time last year."
- **Customer spends less:** "You're projected to spend less on electricity and gas than the same time last year." Note that this occurs only when the customer's bill forecast exceeds their personal cost threshold, even though they did not spend more.
- **Customer spends about the same:** "You're projected to spend about the same on electricity and gas than the same time last year." Note that this occurs only when the customer's bill forecast exceeds their personal cost threshold, even though they did not spend more.

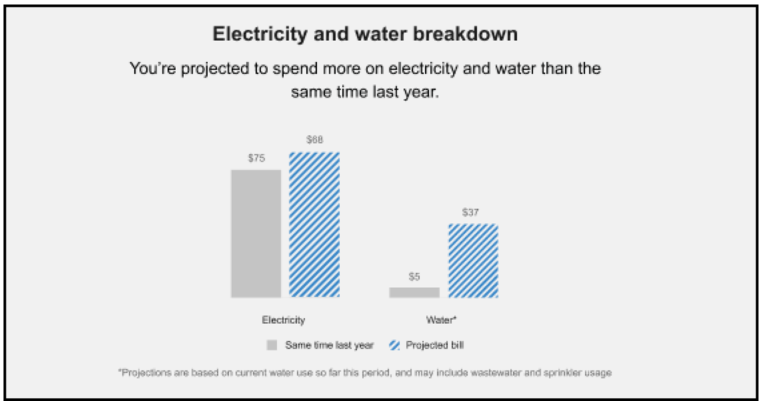
Multi-Service Comparison Module

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. The module includes two bar graphs. Each graph compares projected costs to costs from the same billing period of the previous year. One graph shows electricity and the other shows water. A dollar amount is displayed above each graph bar.

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

Design

This image shows an example of the 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.

Configuration Options	Input Value
Heading You can update the heading of the module. **Default:** "Electricity and water breakdown".	**Optional** Choose one of the following: Use the "Electricity and water breakdown" heading. (Default) Use the following heading:
Subheading You can configure the subheading in the module as necessary. **Default:** "You're projected to spend <more/less> on <fuel/resource> than the same time last year." For example, "You're projected to spend more on electricity and water than the same time last year."	**Optional** Choose one of the following: Use the default subheading. Use the following subheading:

Configuration Options	Input Value
Bar Chart Labels The labels below the bars in the chart can be updated. **Defaults:** • Electricity • Water*	**Optional** Choose one of the following: Use the default labels. Use the following labels:
Decimal Places You can configure the module to display up to two decimal places for the amounts above the bars. **Default:** Display zero decimal places.	**Optional** Choose one of the following: Display zero decimal places. (Default) Display this many decimal places:

Configuration Options	Input Value
Legend Labels The legend labels below the chart can be updated. Defaults: • Projected bill • Same time last year	**Optional** Choose one of the following: Use the default labels. Use the following labels:
Disclaimer Text By default, the disclaimer statement is used to describe water data, and reads "*Projections are based on current water use so far this period, and may include wastewater and sprinkler usage." Note: If you update the disclaimer statement so that it is not associated with water, you should remove the asterisk (*) from the "Water*" bar chart label.	**Optional** Choose one of the following: Use the default disclaimer text. Use the following disclaimer text:

User Experience Variations

Budget Billing

Budget billing customers see a usage experience for this module. The bar chart labels display units rather than dollar amounts. For example, kWh for electricity and gal for water.

Projections Only/No Baselines

If baseline amounts are not available for one or both of the resources in the chart, the subheader statement refers to the comparison between the projected bill amounts of the resources shown in the chart. For example, if the customer is expected to spend the same amount on electricity and water during this period, the statement reads "You're projected to spend the same amount on electricity and water on this upcoming bill." Alternatively, the subheading could read:

- "You're projected to spend more on electricity than water on this upcoming bill."

- "You're projected to spend more on water than electricity on this upcoming bill."

If baselines for both resource types are not available, the module eliminates the previous year bars and the "Same time last year" from the legend. If a baseline is available for one of the resource types, the module displays "N/A" as the label for the resource without a baseline.

Subheading Variations

The subheader changes based on whether a customer spends more or less than they did during the same period last year. The customer must have spent at least 10% more than the previous year to be considered "spending more" during the current bill period. This 10% threshold for the comparison states is not configurable. These subheader variations are possible:

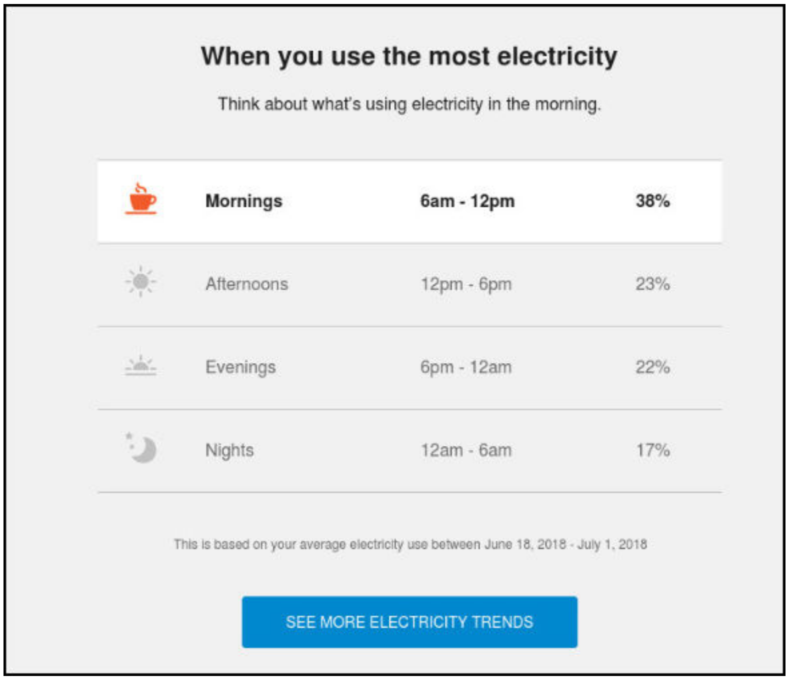
- **Customers spends 10% more on both fuel types:** "You're projected to spend more on electricity and water than the same time last year."
- **Customer spends 10% more on one fuel/resource type, but not the other:** "You're projected to spend more on <fuel/resource type> than the same time last year."
- **Customer spends less:** "You're projected to spend less on electricity and water than the same time last year." Note that this occurs only when the customer's bill forecast exceeds their personal cost threshold, even though they did not spend more.
- **Customer spends about the same:** "You're projected to spend about the same on electricity and water than the same time last year." Note that this occurs only when the customer's bill forecast exceeds their personal cost threshold, even though they did not spend more.

Time of Day Module

The Time of Day module identifies the time of day in which the customer tends to use the most energy and expresses this as a percentage, so that the customer knows when to focus on being more energy-efficient. The usage value represents usage-to-date within the current bill period. The six-hour time period with the most usage is highlighted, while the other three time periods display in a faded color.

Design

This image shows an example of the 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.

Configuration Options	Input Value
Heading You can update the heading of the module as needed. **Default:** "When you use the most <fuel type>".	**Optional** Choose one of the following: Use the default heading. Use the following heading:

Configuration Options	Input Value
Insight Statement You can update the insight statement if needed. **Default:** "Think about what's using the most <fuel type> in the <period name>."	**Optional** Choose one of the following: Use the default statement. Use the following statement:
Period Names in Chart You can name each of the time periods in the chart. Defaults: • Mornings • Afternoons • Evenings • Nights	**Optional** Choose one of the following: Use the default names. Use the following names:

Configuration Options	Input Value
See More Fuel Trends Button You can update the text on this button, as well as the URL to which the customer is directed when clicking the button. **Default:** "See More <fuel type> Trends" 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:

User Experience Variations

This section describes the user experience variations in the Time of Day module.

Multiple High-Use Periods (Tie State)

Customers can have a tie with regard to which time period uses the most energy. This module varies based on whether there are 1, 2, 3, or 4 periods with the same highest usage. The module highlights all periods that tie for the highest usage, and the insight statement varies as follows:

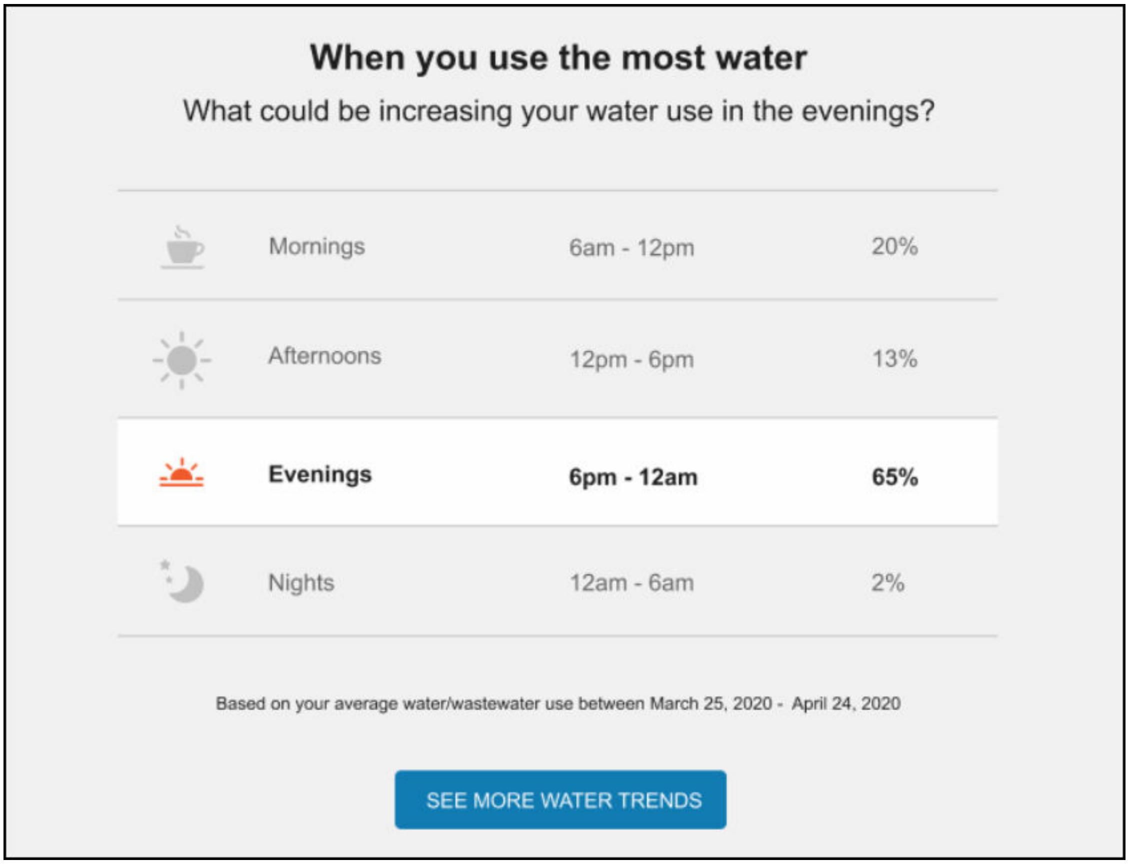
- **Two-way tie:** Think about what's using <fuel type> in the <period1> and <period2>.
- **Three-way tie:** Think about what's using <fuel type> in the <period1>, <period2>, and <period3>.
- **All periods use the same:** You are using an equal amount of <fuel type> throughout the day.

Water Time of Day Module

The Water Time of Day module identifies the time of day in which the customer tends to use the most water and expresses this as a percentage, so that the customer knows when to focus on being more energy-efficient. The usage value represents usage-to-date within the current bill period. The six-hour time period with the most usage is highlighted, while the other three time periods display in a faded color.

Design

This image shows an example of the 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.

Configuration Options	Input Value
Heading You can update the heading of the module as needed. **Default:** "When you use the most water".	**Optional** Choose one of the following: Use the default heading. Use the following heading:

Configuration Options	Input Value
Insight Statement You can update the insight statement if needed. **Default:** "Think about what's using the most water in the <period name>."	**Optional** Choose one of the following: Use the default statement. Use the following statement:
Period Names in Chart You can name each of the time periods in the chart. Defaults: • Mornings • Afternoons • Evenings • Nights	**Optional** Choose one of the following: Use the default names. Use the following names:

Configuration Options	Input Value
See More Water Trends Button You can update the text on this button, as well as the URL to which the customer is directed when clicking the button. **Default:** "See More Water Trends" 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:

User Experience Variations

This section describes the user experience variations in the Water Time of Day module.

Multiple High-Use Periods (Tie State)

Customers can have a tie with regard to which time period uses the most water. This module varies based on whether there are 1, 2, 3, or 4 periods with the same highest usage. The module highlights all periods that tie for the highest usage, and the insight statement varies as follows:

- **Two-way tie:** Think about what's using water in the <period1> and <period2>.
- **Three-way tie:** Think about what's using water in the <period1>, <period2>, and <period3>.
- **All periods use the same:** You are using an equal amount of water throughout the day.

Load Shifting Insights for High Bill Alerts

The Load Shifting: Rate Coach cloud service provides insights that can be included in the High Bill Alert AMI Email. These insights are designed to educate customers about their Time of Use (TOU) and Demand rate plans, and encourage them to shift energy use to off-peak hours.

> **Note**
>
> Utilities must purchase both the Proactive Alerts Cloud Service and the Load Shifting: Rate Coach Cloud Service to provide these insights to their customers.

For customers on TOU rate plans, one of the following modules should replace the Time of Day Module for the electric portion of the High Bill Alert AMI:

- Load Shifting High Usage Module: This version is a simplified module that displays the cost or usage during each peak period.
- TOU HBA Main Insight Module: This is an expanded and updated module that includes additional insights that help readers understand how they can save money and energy by shifting their use to off-peak hours. Oracle recommends using this version of the module.

For customers on Demand rate plans, one of the above modules should replace the Time of Day Module for the electric portion of the alert. Additionally, the Demand 101 should be included in the alert to provide additional explanation about how demand charges are calculated.

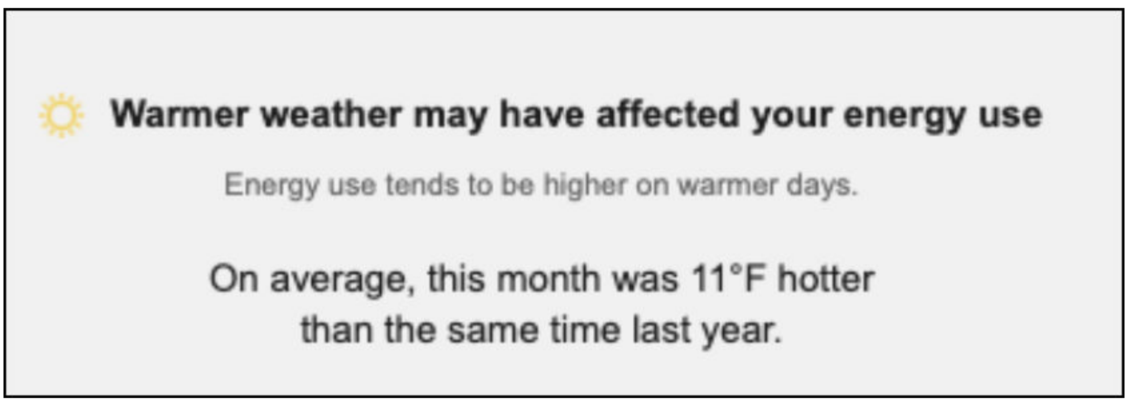
See the Load Shifting: Rate Coach Product Overview for more information.

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.

Design

This image shows an example of the 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.

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:
Subheading The default subheading of the module varies depending on the state. These are the default headings by state: • **Cooler:** Energy use tends to be higher on colder days. • **Warmer:** Energy use tends to be higher on warmer days. • **Neutral:** The weather has been similar to this time last year, and may not have affected your bill.	**Optional** Choose one of the following: Use the default subheadings. Use the following subheadings:

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:** On average, this month was <temp> cooler than the same time last year. • **Warmer:** 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.	**Optional** Choose one of the following: Display zero decimal places. (Default) Display this many decimal places:
Fahrenheit or Celsius The weather insight temperature can be measured in degrees Fahrenheit or Celsius. **Default:** Fahrenheit	**Optional** Choose one of the following: Display degrees in Fahrenheit. (Default) Display degrees in Celsius.

User Experience Variations

This module can vary depending on how the temperature in the current period compares to the temperature in the comparison period from the previous year.

The weather insights calculation determines whether the average temperature was higher or lower between the current period and the comparison period. The calculator generates a weather insight that describes how weather might have impacted the bill's charges, and can result in the use of one of these states:

- Cooler
- Warmer
- Neutral

The sections below describe how weather information is calculated to determine the module state.

Weather Data Collection

Weather information is collected for the following intervals:

- **Current billing period:** An uncompleted bill interval. The bill interval end date can be shifted up to 2 days and 4 hours due to a weather service latency (4 hours).
- **Last year's billing period:** 1 year shifted from the current billing period.
- **Current season period:** Last 30 days interval.
- **Last year's season period:** 1 year shifted from the current season period.

We classify each of the above periods into seasons: Heating, Cooling or Transition. The classification is made using average mean temperature.

Determine Whether Seasons are Comparable

Once the season classifications are calculated, we determine if the seasons are comparable. A comparable season is defined by two periods being either the same season or one period being defined as Transition.

To be comparable the following checks are made:

- current billing period and current season period (for example both must be "Heating", or both must be "Cooling", or one could be "Transition")
- current billing period and previous billing period
- current season period and previous season period

If one or more of the checks return a negative result, the seasons are not considered comparable. In this case, the module will not render in the communication.

Identifying the Weather Insight States

If the seasons are determined to be comparable, then the weather insight states are determined by the season classification and temperature difference calculations listed here:

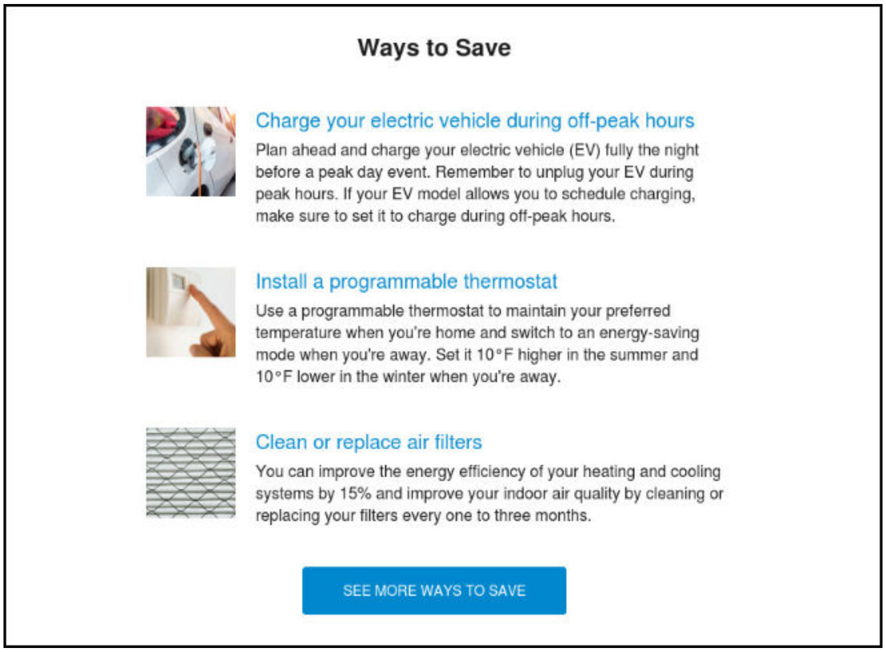
- **Warmer:** If current billing period is classified as Cooling, the mean temperature difference between current bill period and previous bill period is positive, and the mean temperature difference is greater than 8˚F.

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.

Design

This image shows an example of the module.



Configuration Options

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

User Experience Variations

This section discusses the user experience variations in the Ways to Save module.

Water Customers

Customers with water service can receive one of the following experiences:

- Combined water and electricity email
- Water-only email

Customers who receive the combined email will get one water tip and two electric tips. Customers who receive the water-only email should be given a one-tip version of this module, which will include one water tip.

Non-Residential Customers

Non-residential customers receive tips that are more applicable to businesses. See Ways to Save in the *Business Customer Engagement Proactive Alerts Product Overview* for details.

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.

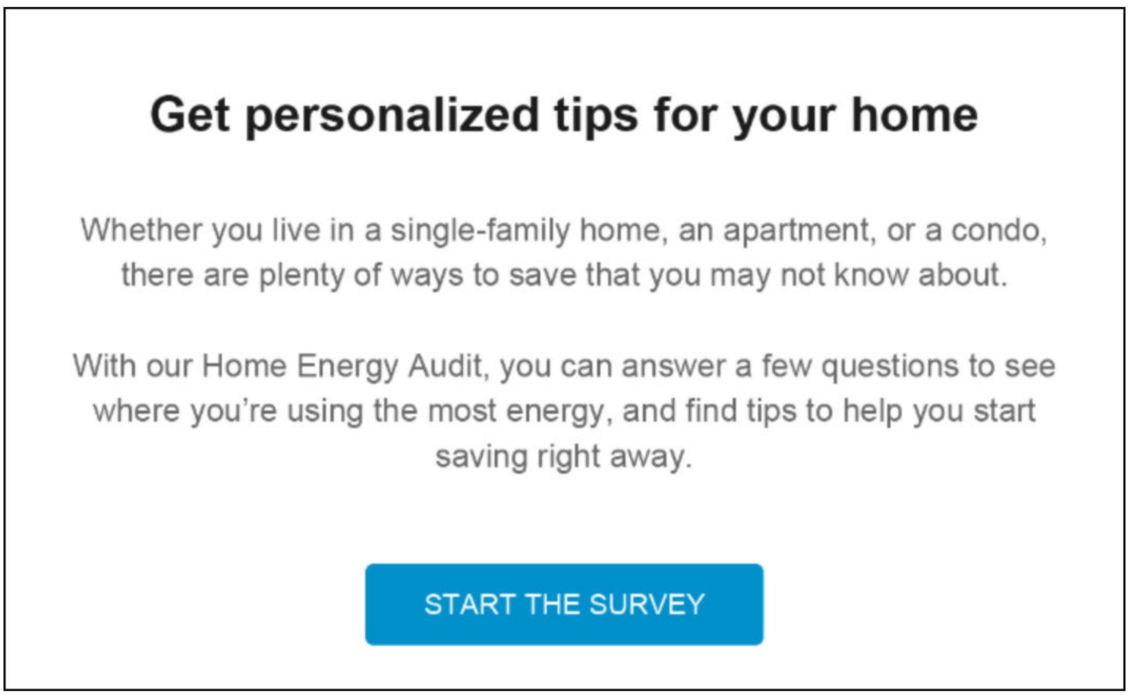
Home Energy Analysis Module

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.

Design

This image shows an example of the 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.

Configuration Options	Input Value
Heading The heading of the module can be customized to meet the needs of the utility. **Default**: Get personalized tips for your home	**Optional** Choose one of the following: Use the default text. Use the following button text:
Home Energy Analysis Statement The statement about the Home Energy Analysis can be customized to meet the needs of the utility. **Default:** Whether you live in a single-family home, and apartment, or a condo, there are plenty of ways to save that you may not know about. With our Home Energy Audit, you can answer a few questions to see where you're using the most energy, and find tips to help you start saving right away.	**Optional** Choose one of the following: Use the default text. Use the following button text:

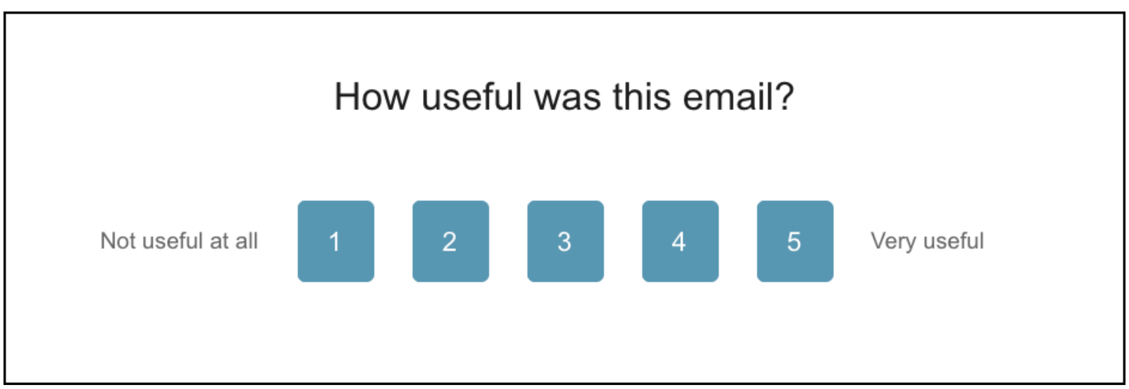
Configuration Options	Input Value
Start The Survey Button You can update the text on this button, as well as the URL to which the customer is directed when clicking the button. **Default:** START THE SURVEY You must also specify the URL the customer should link to when clicking the button.	**Required** 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 module.



Configuration Options

There are no configuration options for this module.

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 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.

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:

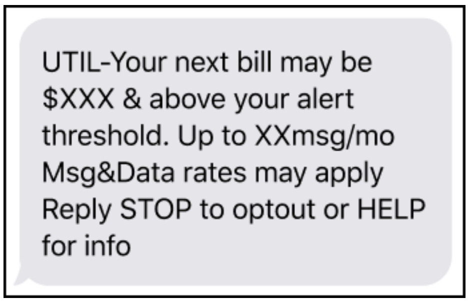
Configuration Options	Input Value
Manage Preference Link Provide a link to a web page where a customer can edit their communication preferences. **Default:** If your program includes a standalone version of the Oracle Utilities Opower web portal, then by default the link points to the appropriate account 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:

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 image shows an example of a High Bill Alert AMI text message.



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.
Opt-Out Message or Tip Due to space limitations, an opt-out message and a tip cannot be included in the text message at the same time. **Default:** Do not include opt-out message.	**Required** Choose one of the following: Do not include an opt-out message. (Default) Include an opt-out message.

Configuration Option	Input Value
Enable Forecast Range Specify whether the projected amount is displayed as a range rather than as a specific amount. **Default:** Display a single amount	**Optional** Choose one of these options: Display single amount. (Default) Display a range.
Include Account Number Specify whether to include the account number in the text message. The number of characters that are displayed in the message is determined by the configuration setting used to mask characters in the High Bill Alert AMI Email. If including the account number, it might be necessary to alter the text in the message to conform to the recommended 160 character limit. **Default:** Do not include the account number.	**Optional** Choose one of these options: Do not include the account number. (Default) Include the account number.

User Experience Variations

This text shows an example of a High Bill Alert AMI SMS message:

UTILCO: Your energy use may be 38% higher than usual & above your alert threshold Up to 4msg/mo Msg&Data rates may apply Reply STOP to optout or HELP for info

The following example text is for a customer without rates modeled or who is on budget billing:

UTILCO: Your electricity use may be 15% higher than usual & above your alert threshold.

The following example text is for a customer whose rate plan has been modeled by Oracle Utilities. In this case, a dollar amount is used instead of a percentage:

UTILCO: Based on your electricity use, your next bill may be $100.00 & above your alert threshold.

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. In this script, rates are not modeled. The primary configurable items are in bold.

Hello. This is an account alert from ***<utility name>****. Your recent* ***<fuel type/usage/cost>*** *is about* ***<cost/percent>*** *higher than it normally is for this time of year. That's higher than the high bill threshold you set, but there's still time to lower your bill. For energy saving tips, visit our website at* ***<website>****. To change your high bill threshold visit* ***<website>****. To hear this message again, press 1. To stop receiving these alerts, press 9. Thank you, goodbye.*

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 (not depicted) This must be configured in the third-party vendor system for voice High Bill Alert AMI voice IVR 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.
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:

User Experience Variations

These examples show how the alert can vary.

Modeled Rates

The following example is for a customer whose rate plan has been modeled by Oracle Utilities. In this case, additional cost information is included.

Hello. This is an account alert from Utility Co. Based on your recent electricity use, your next bill is projected to be $125.00. That's higher than the alert threshold you set, but there's still time to lower your bill. For energy saving tips, visit our website at UtilityCo.com/WaystoSave. To change your high bill threshold visit UtilityCo.com/AccountCenter. To hear this message again, press 1. To stop receiving these alerts, press 9. Thank you, goodbye.

Modeled Rates and Budget Billing

The following example is for a customer without rates modeled or who is on budget billing:

Hello. This is an account alert from Utility Co. Your recent electric use is about 15% higher than it normally is for this time of year. That's higher than the alert threshold you set. For energy saving tips, visit our website at UtilityCo.com/WaystoSave. To change your high bill threshold visit UtilityCo.com/AccountCenter. To hear this message again, press 1. To stop receiving these alerts, press 9. Thank you, goodbye.

Modeled Rates and Dual Fuel

The following example is for a dual fuel customer who has rates modeled:

"Hello. This is an account alert from Utility Co. Recently, your combined gas and electricity is about 15% higher than usual for this time of year. That's higher than the alert threshold you set, but there's still time to lower your bill. For energy saving tips, visit our website at UtilityCo.com/WaystoSave. To change your alert threshold visit UtilityCo.com/AccountCenter. To hear this message again, press 1. To stop receiving these alerts, press 9. Thank you, goodbye."

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

This table provides examples of the different **cost** experiences customers might encounter with mobile push alerts:

Fuel Type	Personal Threshold Set	Personal Threshold Not Set	Personal Threshold Not Available
Electric Only	Utility Company: Based on your electric use, your bill could be $67.00. That's more than your threshold of $57.00.	Utility Company: Your electricity use is 32% higher than usual. We project your next bill to be $45.00.	Utility Company: Your electricity use is 58% higher than usual. We project your next bill to be $37.00.

Fuel Type	Personal Threshold Set	Personal Threshold Not Set	Personal Threshold Not Available
Gas Only	Utility Company: Based on your natural gas use, your bill could be $13.00. That's more than your threshold of $10.00.	Utility Company: Your natural gas use is 32% higher than usual. We project your next bill to be $45.00.	Utility Company: Your natural gas use is 58% higher than usual. We project your next bill to be $37.00.
Combined Gas and Electric	Utility Company: Based on your energy use, your bill could be $105.00. That's more than your threshold of $100.00.	Utility Company: Your energy use is 44% higher than usual. We project your next bill to be $126.00.	Utility Company: Your energy use is 43% higher than usual. We project your next bill to be $150.00.

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 The alert message can begin with the utility company name.	Required Provide the utility name to include in the alert.

User Experience Variations

This table provides examples of the different experiences customers might encounter with mobile push alerts:

Fuel Type	Usage Experience	Budget Billing Experience
Electric Only	Utility Company: Your electricity use is 25% higher than usual for you this time of year. For energy saving tips, visit our website at www.utilco.com.	Utility Company: Your electricity use is 25% higher than usual. This could affect future bill amounts.
Gas Only	Utility Company: Your natural gas use is 25% higher than usual for you this time of year. For energy saving tips, visit our website at www.utilco.com.	Utility Company: Your natural gas use is 25% higher than usual. This could affect future bill amounts.
Combined Gas and Electric	Utility Company: Your energy use is 25% higher than usual for you this time of year. For energy saving tips, visit our website at www.utilco.com.	Utility Company: Your energy use is 25% higher than usual. This could affect future bill amounts

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.

4 Frequently Asked Questions (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.

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.

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.

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**

7

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.