

Oracle® Utilities Opower Proactive Alerts

High Bill Alerts AMI v3 Configuration Guide



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ORACLE®

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1

Getting Started

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

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.

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.

UtilityCo

Account #*****7890

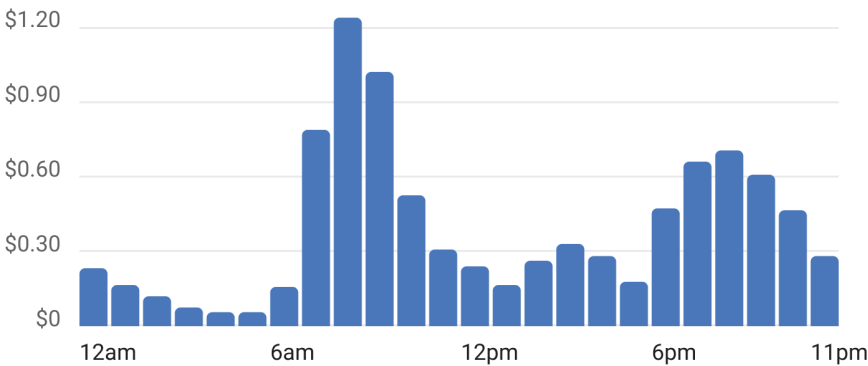
Your bill is projected to be **\$230**

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



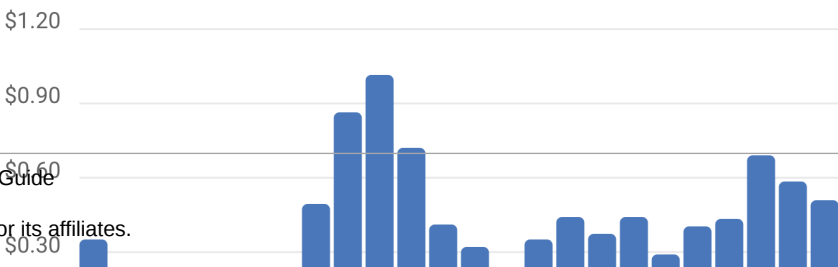
Your average electricity spending on **weekdays**

Apr 30 - May 14



Your average spending on **weekends**

Apr 30 - May 14



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.

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:

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.

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.

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)

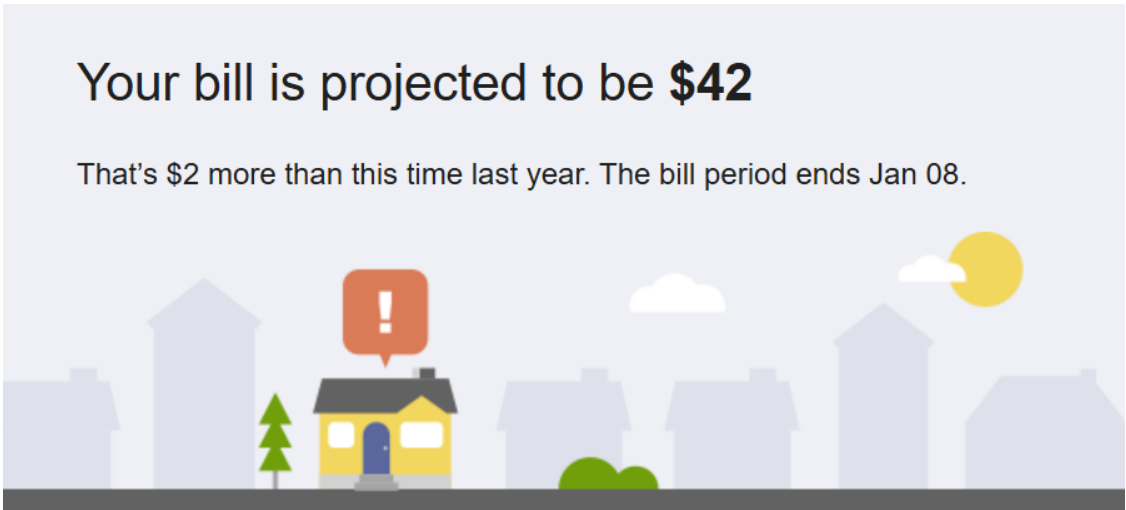
Configuration Options	Input Value
Include Customer Name The name of the customer can be enabled to appear before the account number. Default: Hide the customer name.	Optional Choose one of the following: Do not display the customer name . (Default) Display the customer name .

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:



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.

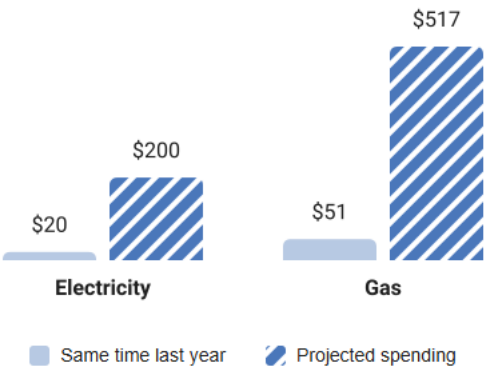
Design

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

Electricity and Gas Example

Electricity and gas forecast

You're likely to spend more on gas than electricity on this upcoming bill.



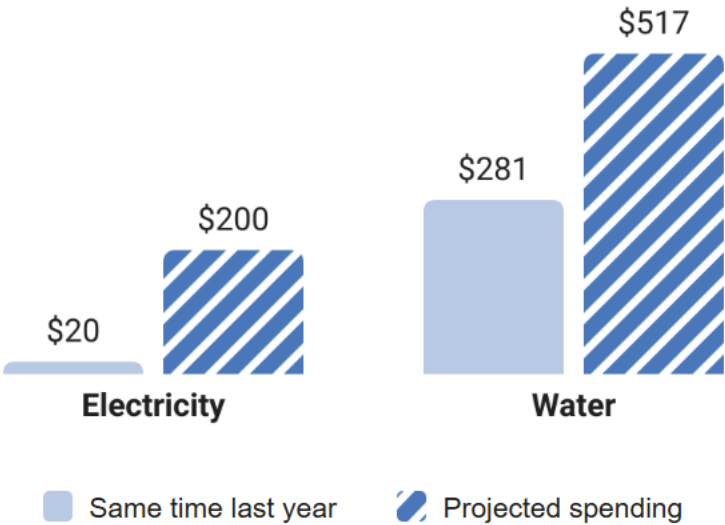
[Explore your energy spending](#)

Optional disclaimer text

Electricity and Water Example

Electricity and water forecast

You're likely to spend more on water than electricity on this upcoming bill.



Explore your spending history

Optional disclaimer text

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, 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:

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

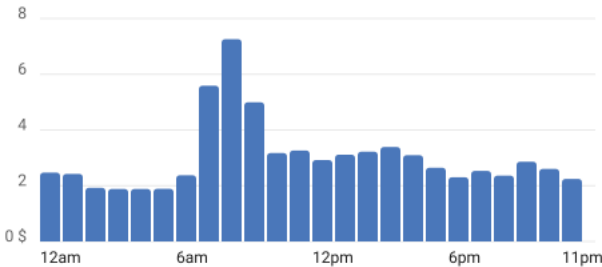
The Trends module identifies the time of day when customers tend to use the most energy so that they know when to focus on being more energy-efficient. The energy usage is displayed in two bar charts: one for average weekday usage and one for average weekend usage. The usage value represents usage-to-date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

Design

This image shows an example of the Trends module.

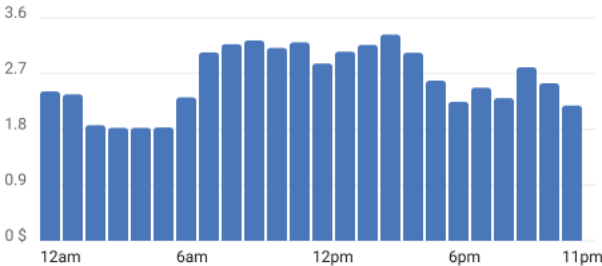
Your average electricity spending on **weekdays**

January 1 – 7, 2024



Your average spending on **weekends**

January 1 – 7, 2024



[Explore your energy spending](#)

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 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:

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

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 [Trends Module](#) for the electric portion of the High Bill Alert AMI:

- [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 [Trends 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 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:
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:

Configuration Options	Input Value
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.

Design

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

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.

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.

Design

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

Help us improve your report

Do you live in a single-family home?

Answer questions like this to help make your tips and insights more relevant.

Yes

No

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

Get personalized tips for your home

Whether you live in a single-family home, an 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.

Start the survey

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
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: Inclu de the Hom e Ener gy Analy sis modu le (defa ult). Hide the Hom e Ener gy Analy sis modu le.
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 Hom e Ener gy Analy sis (defa ult). Use the Easy Open Hom e Ener gy Analy sis.

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.

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:

Want to change when you receive this report?

You are sent alerts when your usage is forecasted to be 35%+ higher than last year. Adjust this threshold at any time.

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
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.

UtilityCo

P.O. Box 1234

Austin, TX 12345-6789

888-999-9999

UtilityCo.com

Savings are estimated for typical premises in the UtilityCo service area and your actual savings may vary. UtilityCo cannot guarantee the amount of money or energy you may save by implementing the recommended actions.

[Manage Preferences](#) | [Unsubscribe](#)

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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:

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 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:

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:
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Configuration Option	Input Value
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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:

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.

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: :

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 :
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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 :

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.

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:

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:

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 defau lt mess age. Use this mess age:
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 defau lt mess age. Use this mess age:
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 defau lt mess age. Use this mess age:

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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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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.

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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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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](#).

Glossary

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