Oracle Utilities Opower Proactive Alerts Cloud Service

Weekly Energy Updates V3 Configuration Guide

Latest Release
G18693-05
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Oracle Utilities Opower Proactive Alerts Cloud Service Weekly Energy Updates V3 Configuration Guide, Latest Release

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Contents

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 Weekly Energy Update communications as part of your Proactive Alerts 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

Weekly Energy Updates are email reports sent to customers every week to inform them of their energy usage patterns, trends, and projected energy costs. With these emails, customers can better understand how their actions correspond to their utility bills, get a preview of their bills, and get helpful insights on how to adjust their energy usage. Weekly Energy Updates v3 provide a new, modernized experience with bold colors, a varied layout, and data-driven insights targeted to specific customer attributes.

Customers can receive different types of Weekly Energy Update emails, including:

- Weekly Energy Updates
- Post Bill Report Emails
- Cost Tracker Report Emails

Additional information on each report type is available in Report Types.

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.

2

Report Types

Weekly Energy Updates v3 are email communications that help customers understand their weekly energy use trends and provide personalized tips on how to be more energy efficient. Many areas of the product vary depending on whether or not the customer's rates have been modeled by Oracle Utilities. Depending on when Oracle Utilities receives the customer's data, it is also possible that a customer with their rates modeled will temporarily have the experience of a customer without modeled rates.

Customers can receive different types of Weekly Energy Update v3 emails, including:

- Weekly Energy Updates
- Post Bill Report Emails
- Cost Tracker Emails
- Cost Tracker Post Bill Report Emails

Additionally, you can include Load Shifting Electric Vehicle (EV) insights in your Weekly Energy Update v3 emails. Load shifting EV insights are provided within Load Shifting EV modules that are purpose-built to be included in the Weekly Energy Update emails. These insights are designed to educate customers about their charging habits and encourage them to shift their charging to hours the utility prefers, such as when there is low demand on the grid or high availability of renewable energy. For information about these insights, see EV Load Shifting Insights in Weekly Energy Update Emails.

Weekly Energy Updates

Weekly Energy Updates are the original, and most common email reports sent to customers every week. These emails inform customers of their energy usage patterns, trends, and projected energy usage or costs. With these emails, customers can better understand how their actions correspond to their utility bills, get a preview of their use or bill, and get helpful insights on how to adjust their energy use.

Weekly Energy Update emails are made up of individual modules. The following list includes the recommended modules, in the recommended order:

- Subject Line and Header Module
- Weekly Comparison Module
- Bill Forecast Module
- Day by Day and Hourly Breakdown Module
- Personalized Tips Module
- Easy Open Module (Optional)
- Customer Feedback Module (Optional. Included in the Energy Efficiency Cloud Service.)
- Footer Module

You can also include EV Load shifting insights in your Weekly Energy Updates. For information about these insights, see EV Load Shifting Insights in Weekly Energy Update Emails.

The following Weekly Energy Update report types are supported:

- **Single Fuel Electric**: Weekly Energy Updates for customers who only have electricity. The energy units are displayed as kilowatt-hours (kWh).
- **Single Fuel Natural Gas**: Weekly Energy Updates for customers who only have natural gas. The energy units are displayed as therms, CCF, or m^3.
- **Dual Fuel - Electric and Natural Gas**: Weekly Energy Updates for customers who have both electricity and natural gas. Electric use is displayed as kWh and gas use is displayed as therms, CCF, or m^3.

The image below shows an example of an electricity Weekly Energy Update.

UtilityCo

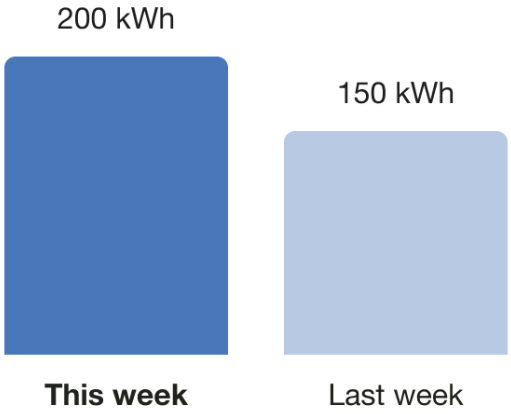
Account #******7890

Sarah,

Here's your weekly energy update

April 2 - 8, 2024

You used **33% more** electricity this week



Your bill is projected to be **$218**

Days until your next bill: 6

This is an estimate.

Your electricity use this week

You used the most on **Wednesday**

Post Bill Report Emails

After a bill period is completed, customers can receive the Post Bill Report email, which provides deeper understanding of how much energy each of their major gas or electric end uses consumed during the month. Disaggregated cost or usage is based on the AMI data that is collected during the billing period. Providing this information helps customers understand where they are using the most energy, and provides them with suggestions about how they can reduce use and save money.

The Post Bill Report email uses the information that the utility knows about the customer to determine their energy usage. While Opower's Appliance Detection and Disaggregation models are not required, they can enhance the data that is provided in the Post Bill Report email. Your Delivery Team can provide you with additional details regarding appliance disaggregation.

Customers receive one Post Bill Report email each month. This email replaces the standard Weekly Energy Update email on the week after the customer's bill period ends.

The Post Bill Report email is made up of individual modules, and it is recommended that they are included in the email in the following order:

- Subject Line and Header Module
- Post Bill Report Introduction Module
- Post Bill - Bill Comparison Module
- Post Bill End Uses Module
- Post Bill Always On Module
- Personalized Tips Module
- Easy Open Module (Optional)
- Customer Feedback Module (Optional. Included in the Energy Efficiency Cloud Service.)
- Footer Module

You can also include EV Load shifting insights in your Post Bill Report emails. For information about these insights, see EV Load Shifting Insights in Weekly Energy Update Emails.

UtilityCo

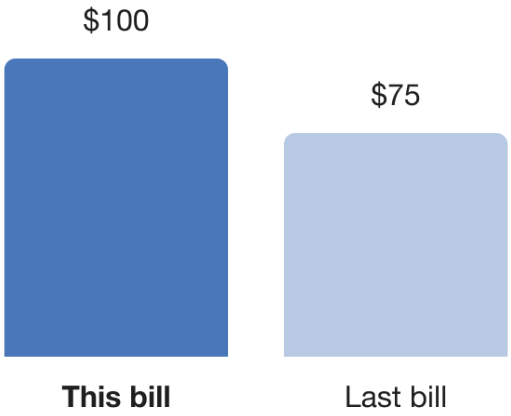
Account #******7890

Sarah,

Here's how your bill breaks down

April 16 - May 15, 2024

You spent **$25 more** on electricity this bill period



These top categories made up $80 of your energy cost this bill

Heating	Refrigeration	Laundry
$40	**$30**	**$10**

Appliances	**$15**
All other	**$5**

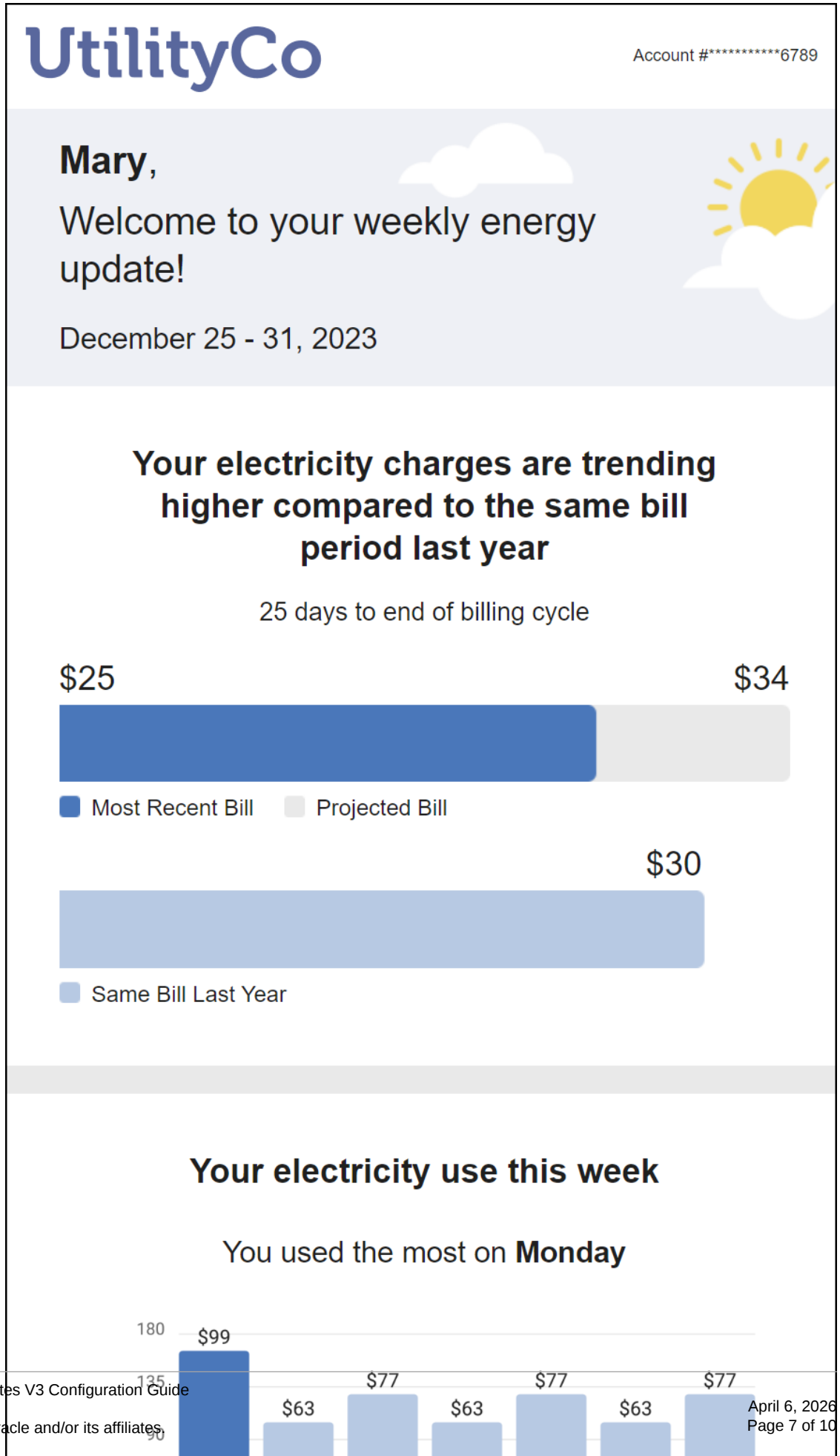
Cost Tracker Emails

Cost Tracker emails are designed to help residential customers save more energy by showing them how their energy costs are tracking across the month.

Cost Tracker emails are made up of individual modules. The following list includes the recommended modules, in the recommended order:

- Subject Line and Header Module
- Cost Tracker Module
- Day by Day and Hourly Breakdown Module
- Personalized Tips Module
- Easy Open Module (Optional)
- Customer Feedback Module (Optional. Included in the Energy Efficiency Cloud Service.)
- Footer Module

The image below shows an example of an electricity Cost Tracker Report email.



Cost Tracker Post Bill Report Emails

After a bill period is completed, customers who are receiving the Cost Tracker Emails can receive the Cost Tracker Post Bill Report email, which provides deeper understanding of how much energy each of their major gas or electric end uses consumed during the month. Disaggregated cost or usage is based on the AMI data that is collected during the billing period. Providing this information helps customers understand where they are using the most energy, and provides them with suggestions about how they can reduce use and save money.

The Cost Tracker Post Bill Report email uses the information that the utility knows about the customer to determine their energy usage. While Opower's Appliance Detection and Disaggregation models are not required, they can enhance the data that is provided in the Cost Tracker Post Bill Report email. Your Delivery Team can provide you with additional details regarding appliance disaggregation.

Customers receive one Post Bill Report email each month. This email replaces the standard Weekly Energy Update email on the week after the customer's bill period ends.

The Post Bill Report email for customers who receive Cost Tracker Report emails is made up of individual modules, and it is recommended that they are included in the email in the following order:

- Subject Line and Header Module
- Cost Tracker Module
- Post Bill End Uses Module
- Post Bill Always On Module
- Personalized Tips Module
- Easy Open Module (Optional)
- Customer Feedback Module (Optional. Included in the Energy Efficiency Cloud Service.)
- Footer Module

This image shows an example of the email:

GET IT ON Google Play

Account #**********6789

Sarah,

Here's how your most recent bill breaks down

December 31, 2023 - February 1, 2024

You spent less on electricity this bill period than the same period last year

22 days in billing cycle

$700.7

Most Recent Bill

$1,229.2

Same Bill Last Year

These top categories made up $271 of your energy cost this bill

Appliances	Water Heating	Lighting
$118	$106	$47

3 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.

Global Configurations

The following global configurations impact multiple modules for Weekly Energy Updates. 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
Show Energy Use in Place of Energy Costs Energy use can be displayed rather than energy costs even in the scenario where cost information is available. **Default**: Display energy costs when available.	**Optional** Choose one of the following: • Use the default and display energy costs when available. • Show energy use in place of costs.
Enable Negative Energy Use Display For customers on net metering rate plans that support solar credits, negative energy use can be displayed in applicable graphs such as the Weekly Comparison Module and the Day by Day and Hourly Breakdown Module. **Default**: Disable display of negative energy use or energy costs.	**Optional** Choose one of the following: • Use the default and disable showing negative energy use. • Enable the display of negative energy use for customers on net metering rate plans.

Subject Line and Header Module

The Weekly Energy Update subject line indicates that the email contains an update about the customer's energy use. The subject line varies based on report type and fuel type. For example, for electricity customers, the subject line is "Your weekly electricity update."

The Weekly Energy Update header includes the utility's logo, customer name, and customer account number (with only the last four digits displayed).

Standard Weekly Energy Update email headers also include the email title, and date range. The title varies depending on the customer's fuel type. Additionally, in the first Weekly Energy Update email a customer receives, the header includes a short introductory paragraph that explains the purpose of email. The Post Bill Report email does not include these items, and instead, the Post Bill Report Introduction Module is displayed.

If customers have any problems viewing the email, they can click a link to view it correctly in the email browser.

Design

This image shows an example of the Header module's design for electricity customers.

This image shows an example of the Subject module's design for electricity customers.

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 Logo The RGB and CMYK versions of the utility logo as .ai files. **Example**: UtilityCo_Logo_RGB.ai	**Required** Provide the utility logo in the *Oracle Utilities Opower Platform Configuration Guide*.

Configuration Option	Input Value
Utility Logo URL The URL can be configured to point to a utility-specific web page. **Default:** Do not use a URL.	**Optional** Choose one of the following: • Do not use a URL. • Use the following URL:
Account Number Format An example of how the customer account number is formatted on the bill. In your example, indicate how many digits should be displayed (in the example below, four digits are displayed). **Default**: ****1234	**Required** Provide the account number format in the *Oracle Utilities Opower Platform Configuration Guide*.
Email Subject Line (not depicted) Specify the default email subject line to use. Oracle Utilities Opower recommends using the default subject lines, as research has shown that they drive the most customer engagement. **Default**: Varies by fuel type, amount used, and other factors. See User Experience Variations for details.	**Required** Choose one of the following: • Use the default subject lines. • Work with your Delivery Team to determine the best approach.
"From" Name (not depicted) The name that appears in the “From” line in all email communications can be altered. **Default**: The utility name is used as the "From" name.	**Optional** Indicate the desired "From" name in the *Oracle Utilities Opower Platform Configuration Guide*.
"From" Address (not depicted) The "From" email address that will appear as the sender for the email communication. **Default**: The utility must provide a "From" email address.	**Required** Indicate the desired "From" address in the *Oracle Utilities Opower Platform Configuration Guide*.
"Reply To" Address (not depicted) The email address that will be populated when a customer replies to the communication. **Default**: The utility email address specified for the “From” is reused as the Reply To address.	**Optional** Indicate the desired "Reply To" address in the *Oracle Utilities Opower Platform Configuration Guide*.

User Experience Variations

The user experience varies for customers depending upon their service types, available data, costs, and locale. Note that the following list indicates the primary user experience variations, not all possible variations.

Subject Line Variations - Weekly Energy Update Emails

Single Fuel Electric: The single fuel electric subject line varies depending on whether the customer *used* more, less, or about the same amount of electricity as the previous week. If

rates are modeled, then the subject line focuses on how the customer *spent* more, less, or about the same amount of money on electricity as the previous week. The following examples show the electricity usage variations.

- "Weekly electricity update: You used X% more electricity"
- “Weekly electricity update: You used X% less electricity”
- "Weekly electricity update: Your electricity usage was about the same”

Single Fuel Natural Gas: The single fuel gas subject line varies depending on whether the customer *used* more, less, or about the same amount of gas as the previous week. If rates are modeled, then the subject line focuses on how the customer *spent* more, less, or about the same amount of money on gas as the previous week. The following examples show the gas usage variations.

- "Weekly gas update: You used X% more gas"
- "Weekly gas update: You used X% less gas”
- "Weekly gas update: Your gas usage was about the same”

Dual Fuel - Electric and Natural Gas: The dual fuel subject line varies depending on whether the customer *used* more, less, or about the same amount of gas and electricity as the previous week. If rates are modeled, then the subject line focuses on how the customer *spent* more, less, or about the same amount of money on gas and electricity as the previous week. The following examples show a few of the possible electricity and gas usage variations.

- "Weekly energy update: You used less X% electricity and Y% less gas"
- "Weekly energy update: You used X% less electricity and Y% more gas"
- "Weekly energy update: Your electricity and gas usage were about the same"

Email Spans Multiple Months: If the date range spans multiple months, then the month names are abbreviated to reduce the number of characters in the subject line. The format for the subject line in this situation is, "Your weekly energy breakdown for <month1 date1-month2 date2, year>: <Insight statement>".

- Example: "Your weekly energy breakdown for Feb 29-Mar 6, 2020: You used X% more electricity"

Email Spans Two Years: If the date range spans multiple years, then the first year is omitted and month names are abbreviated. The format for the subject line in this situation is, "Your weekly energy breakdown for <month date1-month2 date2, year2>: <Insight statement>".

- Example: "Your weekly energy breakdown for Dec 31-Jan 6, 2020: You used X% more electricity"

Subject Line Variations - Post Bill Report Emails

The Post Bill Email subject line indicates that the customer spent or used more, less, or about the same on their most recent bill as compared to the previous bill. The subject line indicates the type of energy in single fuel emails (ie, electricity or gas) and says "energy" in dual fuel emails. Subject lines include:

- Hi <first name>, you used less <energy/electricity/gas> this bill period <date range>
- Hi <first name>, you used more <energy/electricity/gas> this bill period <date range>
- Hi <first name>, you used the same amount of <energy/electricity/gas> this bill period <date range>
- Hi <first name>, you spent less <energy/electricity/gas> this bill period <date range>

- Hi <first name>, you spent more <energy/electricity/gas> this bill period <date range>
- Hi <first name>, you spent the same amount of <energy/electricity/gas> this bill period <date range>

Email Title Variations

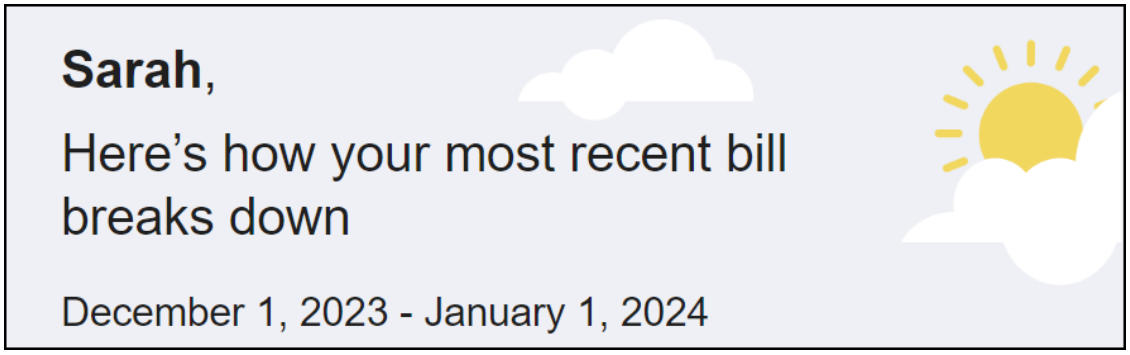
- **Single Fuel Electric**: "Your weekly electricity update"
- **Single Fuel Natural Gas**: "Your weekly gas update"
- **Dual Fuel - Electric and Natural Gas**: "Your weekly energy update"
- **Post Bill Report:** No title is included here. Instead, the Post Bill Introduction module is included.

Post Bill Report Introduction Module

The Post Bill Report Introduction module appears at the top of the Weekly Energy Update Post Bill Report email, and notifies the customer that this email will provide them with a breakdown of their recent bill. The module also provides the dates of the associated billing period.

Design

The image below is an example of the Post Bill Report Introduction 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 Option	Input Value
Header The statement that appears at the top of the email to explain what the email is about. **Default**: Here's how your most recent bill breaks down	**Optional** Choose one of the following: Use the default statement. Use the following statement:

User Experience Variations

The user experience varies for customers depending upon their service types, available data, costs, and locale. Note that the following list indicates the primary user experience variations, not all possible variations.

Dual Fuel with Different Date Ranges

When the email covers two different fuel types, and the bill period dates for each fuel type differ, both date ranges are displayed in the module. For example:

Electric: Oct 1, 2020-Nov 1,2020

Gas: Oct 2, 2020-Nov 3, 2020

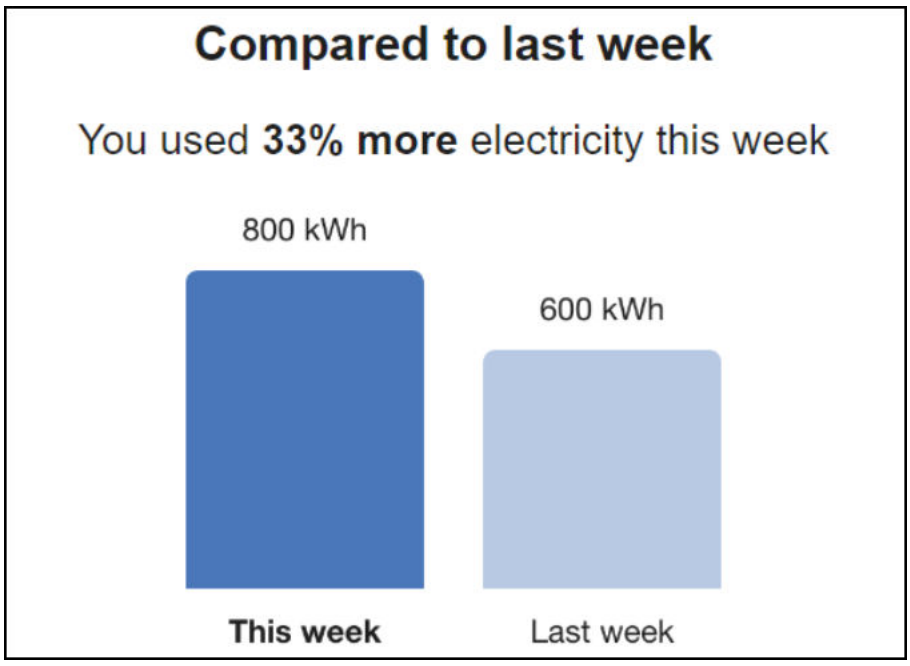
Weekly Comparison Module

The Weekly Comparison module shows a week-over-week comparison of a customer's weekly electric or gas use. If the customer is dual fuel, the module includes graphs for both electric and gas use. If the customer is eligible to receive cost information, a cost comparison is shown instead of a usage comparison.

> **Note**
>
> The Weekly Comparison module is not included in Cost Tracker Report emails.

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 Option	Input Value
Bar Colors Colors in the graph can match the utility's color palette. **Default**: The colors in the example represent the default colors.	**Required** Choose one of the following: • Use the default colors. • Work with your Delivery Team to specify other colors.
Display Cost Information (not depicted) If a customer's rates are modeled, the cost per day can be displayed in the graph. **Default**: Display cost information if it is available.	**Optional** Choose one of the following if cost information is available: • Use the default (display the cost information). • Hide the cost information and display usage information instead.
Comparison Range (not depicted) The comparison range determines whether the customer's energy use for the current week falls within the "neutral" state. The neutral state, which provides the message, "You used about the same…" occurs if this week's usage or cost is within +/- *n* of the specified range. The range is configurable, and can be stated as a percentage. **Default**: The default is +/- 1% for both usage and cost.	**Required** Use the following range:
Display Dates (not depicted) Each bar on the graph includes a label underneath, which defines each bar as This week and Last week respectively. This messaging can be replaced with the date range for each week. For example, if the display of dates is enabled, the This week bar displays a date such as Jan 1 - 7 and the Last week bar displays a date such as Dec 25 - 31. **Default**: Display Last week and This week messaging for each bar respectively.	**Optional** Choose one of the following display options: • Use the default (display Last week and This week messaging for each bar respectively). • Display date ranges underneath each bar in place of Last week and This week messaging.

User Experience Variations

The user experience varies for customers depending upon their service types, available data, costs, and locale. Note that the following list indicates the primary user experience variations, not all possible variations.

Gas-Only

For gas-only customers, the electricity unit "kWh" is replaced by "therms" or "CCFs" (whichever unit of measure is appropriate for the utility), and the word "electricity" is replaced by "gas".

Dual Fuel

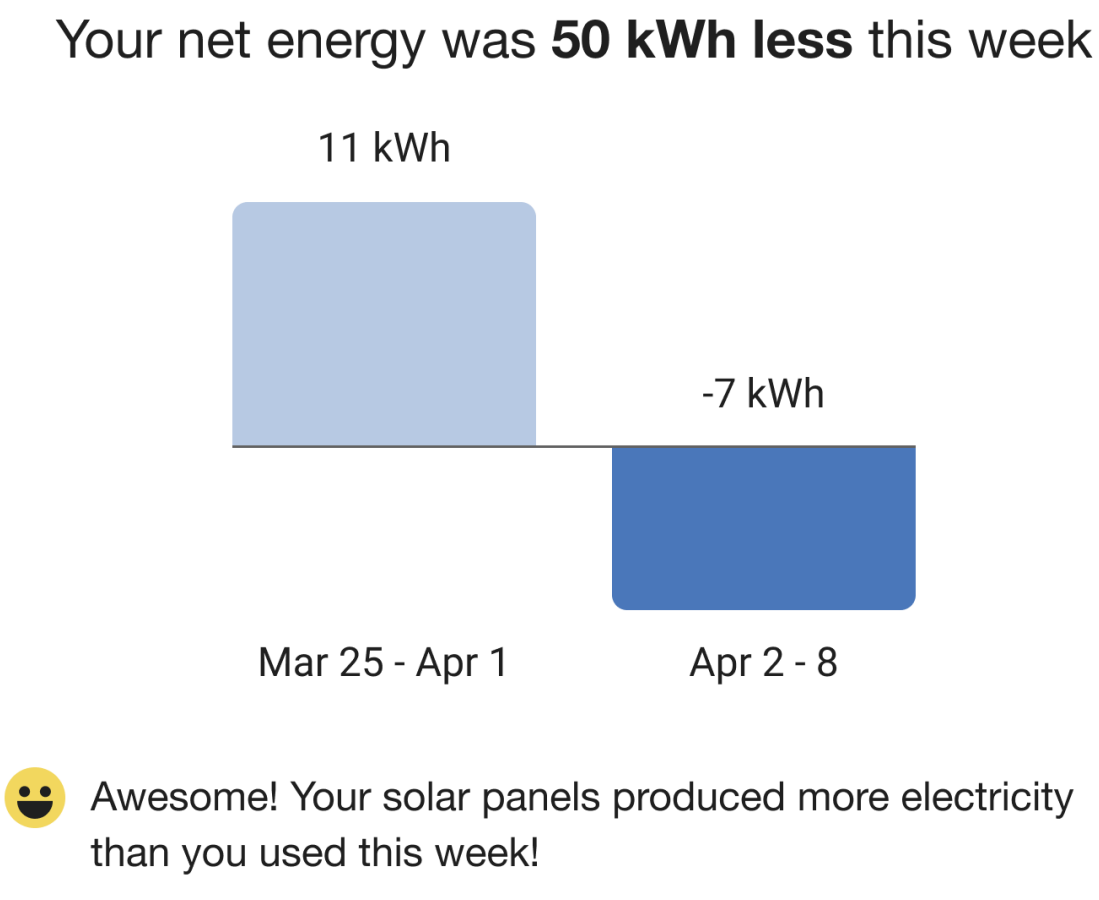
Dual fuel customers see two graphs in the Weekly Comparison, one for electricity usage and one for gas usage. The title is "Compared to last week".

Rates Modeled

If rates are modeled and the utility has opted to display cost information in this module, then cost information is displayed in the comparison rather than usage information.

Negative Values for Solar Customers

For customers on net metering rate plans that support solar credits, negative energy use can be displayed in the Weekly Comparison graph. This can include bars that are displayed below the graph axis to represent negative values as shown in the example below. Be aware the support for negative value display must be configured, which is discussed as part of the global configurations in Design and Configuration.

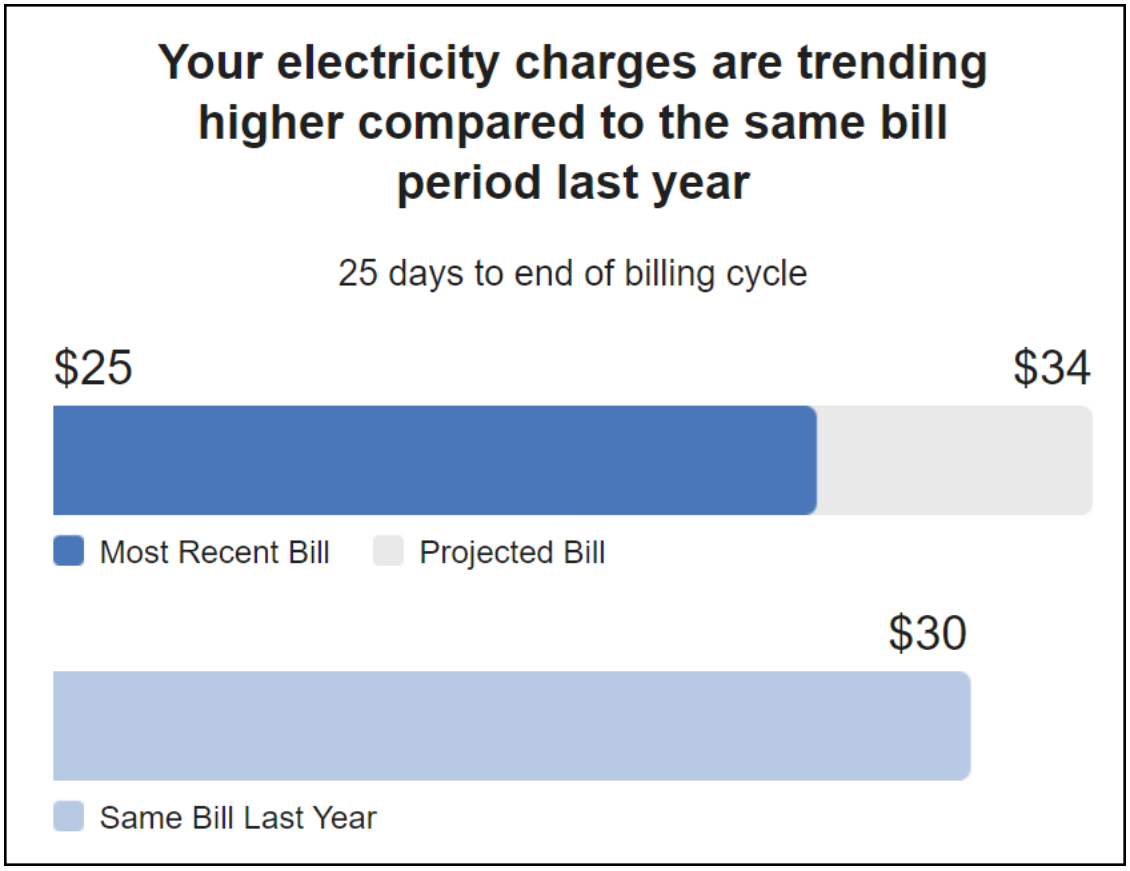


Cost Tracker Module

The Cost Tracker module is designed to help residential customers save more energy by showing them how their energy costs are tracking across the month.

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 Option	Input Value
Bar Colors Colors in the graph can match the utility's color palette. **Default**: The colors in the example represent the default colors.	**Required** Choose one of the following: • Use the default colors. • Work with your Delivery Team to specify other colors.
Display Cost Information (not depicted) If a customer's rates are modeled, the cost per day can be displayed in the graph. **Default**: Display cost information if it is available.	**Optional** Choose one of the following if cost information is available: • Use the default (display the cost information). • Hide the cost information and display usage information instead.

Configuration Option	Input Value
Comparison Range (not depicted) The comparison range determines whether the customer's energy use for the current week falls within the "neutral" state. The neutral state, which provides the message, “You used about the same…” occurs if this week’s usage or cost is within +/- *n* of the specified range. The range is configurable, and can be stated as a percentage. **Default**: The default is +/- 1% for both usage and cost.	**Required** Use the following range:

User Experience Variations

The user experience varies for customers depending upon their service types, available data, costs, and locale. Note that the following list indicates the primary user experience variations, not all possible variations.

Gas-Only

For gas-only customers, the electricity unit “kWh” is replaced by “therms” or "CCFs" (whichever unit of measure is appropriate for the utility), and the word "electricity" is replaced by "gas".

Dual Fuel

Dual fuel customers see two graphs in the Cost Tracker, one for electricity usage and one for gas usage. The title is "Compared to last week".

Rates Not Modeled

If rates are not modeled or the utility has opted to not display cost information in this module, then energy use information is displayed in the comparison rather than cost information.

Calculations

The Cost Tracker insight is generated by displaying the customer’s energy use or costs for the week, a projection of what the customer is forecast to use by the end of the billing period, along with a bill or energy use from the same bill period last year. The customer’s current energy use information is collected through their AMI data. If the customer’s rate is available, the rate is multiplied by energy use to determine cost. Otherwise, energy use is displayed. The insight calculates the projected difference to alert the customer as to whether they are projected to use more energy, use less energy, or use about the same amount of energy.

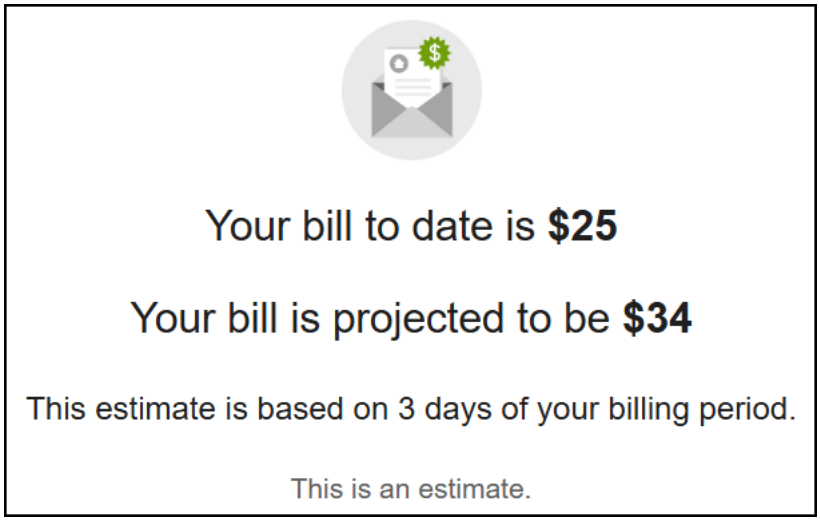
Bill Forecast Module

The Bill Forecast module informs customers how much their bill is projected to be by the end of the billing period. Dual fuel customers see a combined bill forecast for both electric and gas use. The purpose of the forecast is to encourage customers to lower their usage before the bill period ends.

> **Note**
>
> The Bill Forecast module is not included in Cost Tracker Report emails, as this forecast is accomplished through the Cost Tracker module.

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 Option	Input Value
Hide Bill Projection Displays the customer's estimated cost or usage for the end of the bill period **Default**: Show the bill projection.	**Optional** Choose one of the following: • Use the default • Hide the bill projection
Hide Bill-to-Date Displays the customer's current usage or cost for the billing cycle so far. **Default**: Show the bill-to-date.	**Optional** Choose one of the following: • Use the default • Hide the bill-to-date
Hide Bill Estimate Message Displays a brief message about what the bill estimate is based upon. **Default**: Show the bill estimate message.	**Optional** Choose one of the following: • Use the default • Hide the bill estimate message

User Experience Variations

The user experience varies for customers depending upon their service types, available data, costs, and locale. Note that the following list indicates the primary user experience variations, not all possible variations.

Gas-Only

Gas-only customers see "therms" or "CCFs" (whichever unit of measure is appropriate for the utility) displayed in the bill forecast rather than kWhs.

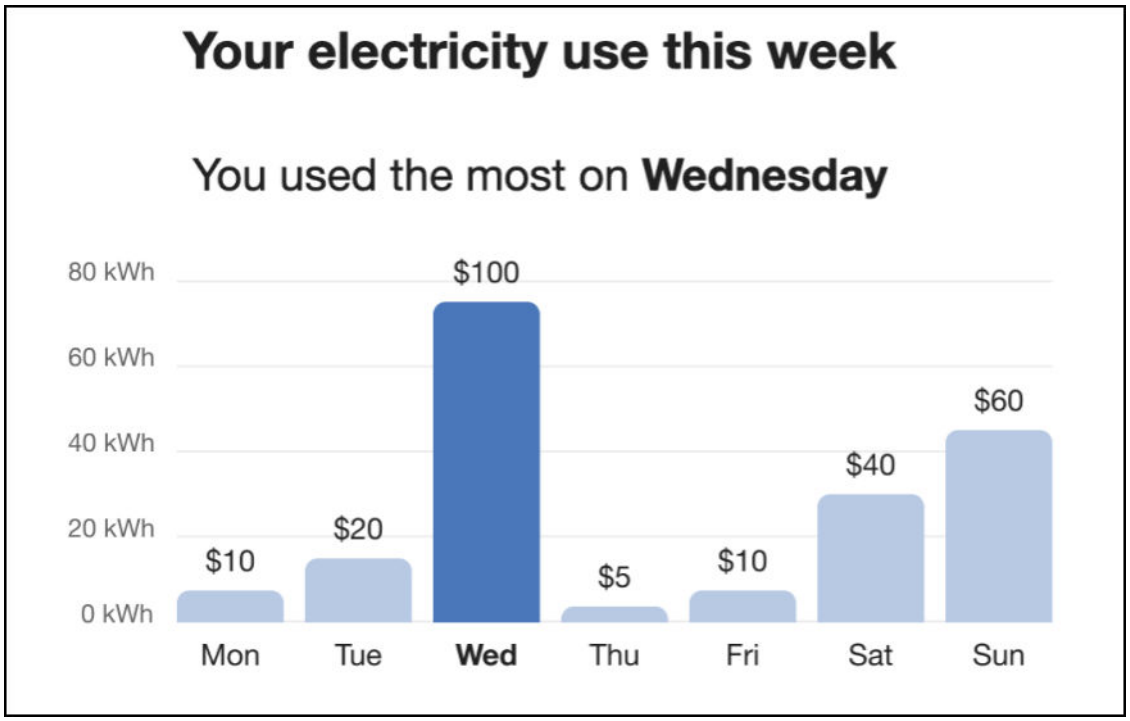
Rates Not Modeled If the customer does not have rates modeled, the Bill Forecast displays energy use instead of cost. Electric-only customers are displayed in kWh. For gas-only customers, Therms or CCFs are displayed rather than kWhs. Only single-fuel usage forecasts are supported.

Day by Day and Hourly Breakdown Module

The Day By Day and Hourly Breakdowns module displays these breakdowns one after the other. Refer to each section to learn about each breakdown.

Design - Day by Day Breakdown

This image shows an example of the module.



Configuration Options - Day by Day Breakdown

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
Title and Subtitle The title indicates the purpose of the graph. The subtitle indicates the day when energy usage or cost was the highest. **Default**: Varies by fuel type. See User Experience Variations below for details.	**Optional** Choose one of the following: • Use the default title and subtitle. • Work with your Delivery Team to specify a different title and subtitle.
Bar Colors Bar colors in the graph can match the utility's color palette. Both the peak bar color and the non-peak bar color can be changed. **Default**: The colors in the example represent the default colors.	**Required** Choose one of the following: • Use the default colors. • Work with your Delivery Team to specify other colors.
Display Cost Information (not depicted) If a customer's rates are modeled, the cost per day can be displayed below each bar in the graph. **Default**: Display cost information if it is available.	**Optional** Choose one of the following: • Use the default (display the cost information if it is available). • Hide the cost information.

User Experience Variations - Day by Day Breakdown

The user experience varies for customers depending upon their service types, available data, costs, and locale. Note that the following list indicates the primary user experience variations, not all possible variations.

Title

- "Your electricity use this week"
- "Your gas use this week"

Subtitle

- "You used the most on <day>"

Gas-Only

For gas-only customers, the electricity unit "kWh" is replaced by "therms" or "CCFs" (whichever unit of measure is appropriate for the utility), and the word "electricity" is replaced by "gas".

Dual Fuel

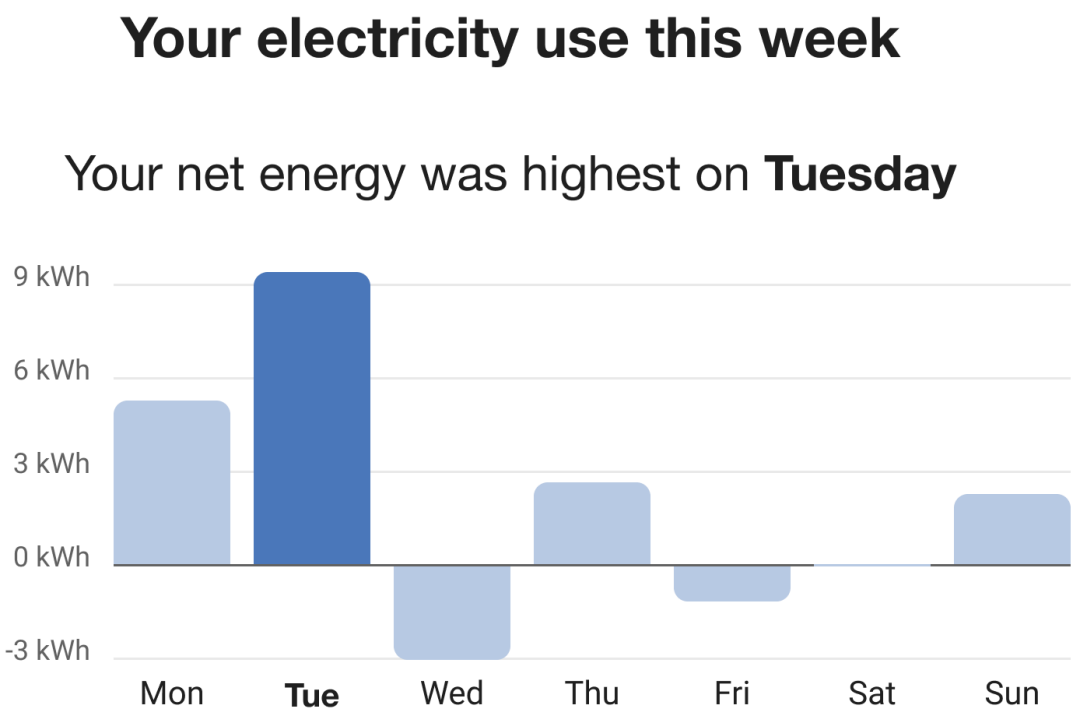
Dual fuel customers see two separate Day-by-Day Breakdown modules, one for electricity use and one for gas. The heading above each graph specifies the fuel type.

Rates Modeled

If rates are modeled and the utility has opted to display cost information in this module, then cost information is displayed beneath each bar in the graph to indicate the cost of energy for that day.

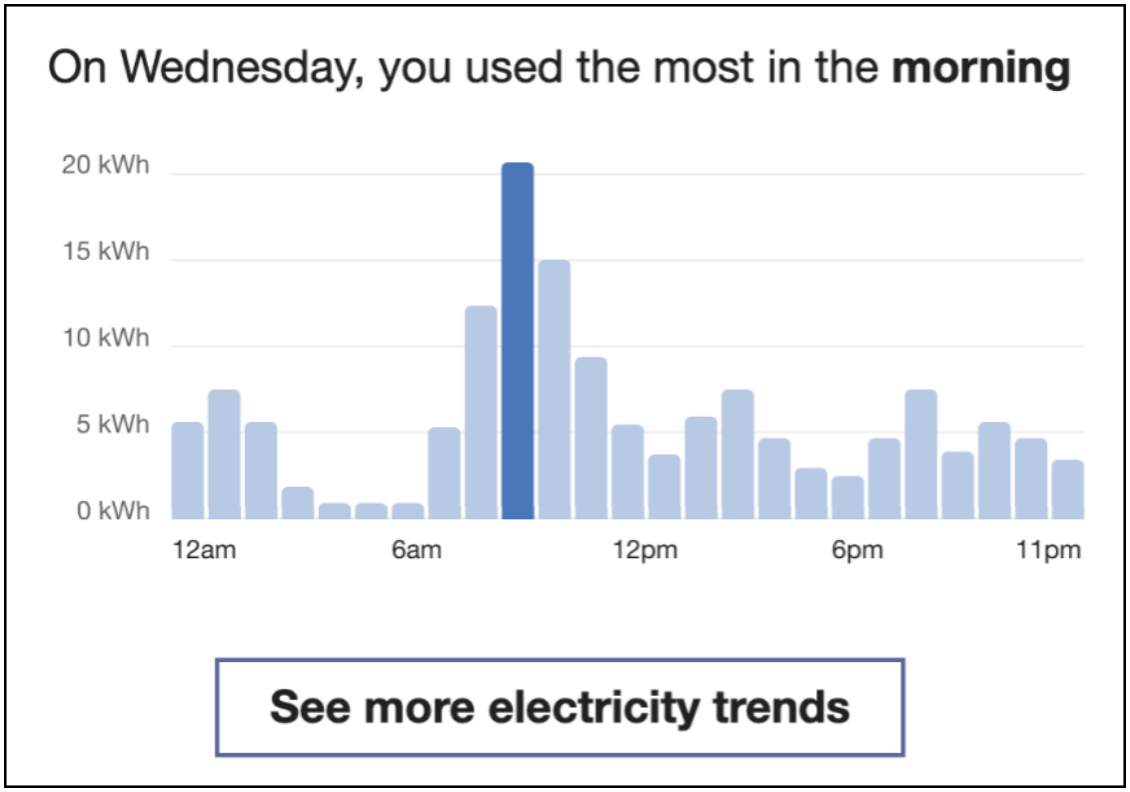
Negative Values for Solar Customers

For customers on net metering rate plans that support solar credits, negative energy use or energy cost can be displayed in the Day by Day Breakdown graph. This can include bars that are displayed below the graph axis to represent negative values as shown in the example below. Be aware the support for negative value display must be configured, which is discussed as part of the global configurations in Design and Configuration.



Design - Hourly Breakdown

This image shows an example of the module.



Configuration Options - Hourly Breakdown

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
Title The title indicates the general time period during which the customer used the most energy. **Default**: Varies by time of day. See User Experience Variations below for details.	**Optional** Choose one of the following: • Use the default titles. • Work with your Delivery Team to specify different titles.
Line Colors Colors in the graph line graph and in the shading below the line can match the utility's color palette. **Default**: The colors in the example represent the default colors.	**Required** Choose one of the following: • Use the default colors. • Work with your Delivery Team to specify different colors.
Call-to-Action URL The call-to-action URL ("See more electricity trends") directs the user to another web feature where this more detailed information about their energy use over time. **Default**: The link points to the Energy Management Data Browser.	**Optional** Choose one of the following: • Use the default. • Work with your Delivery Team to discuss pointing the link to a different feature or web page.

User Experience Variations - Hourly Breakdown

The user experience varies for customers depending upon their service types, available data, costs, and locale. Note that the following list indicates the primary user experience variations, not all possible variations.

Gas-Only

For gas-only customers, the electricity unit “kWh” is replaced by “therms” or "CCFs" (whichever unit of measure is appropriate for the utility), and the word "electricity" is replaced by "gas".

Dual Fuel

Dual fuel customers see two separate Hourly Breakdown modules, one for electricity use and one for gas. The button below each graph specifies the fuel type.

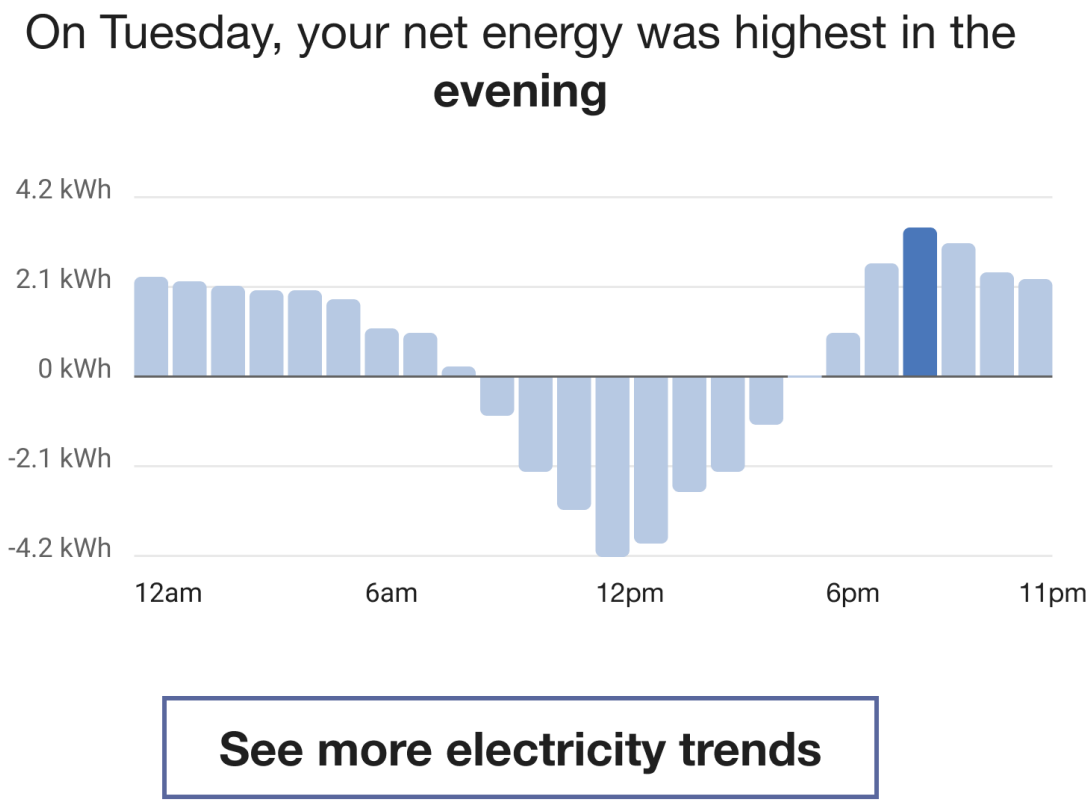
Titles

The title varies by the time period during which the customer used the most energy.

- “On [date], you used the most in the morning.”
- “On [date], you used the most in the afternoon.”
- “On [date], you used the most in the evening.”
- “On [date], you used the most at night.”

Negative Values for Solar Customers

For customers on net metering rate plans that support solar credits, negative energy use can be displayed in the Hourly Breakdown graph. This can include bars that are displayed below the graph axis to represent negative values as shown in the example below. Be aware the support for negative value display must be configured, which is discussed as part of the global configurations in Design and Configuration.



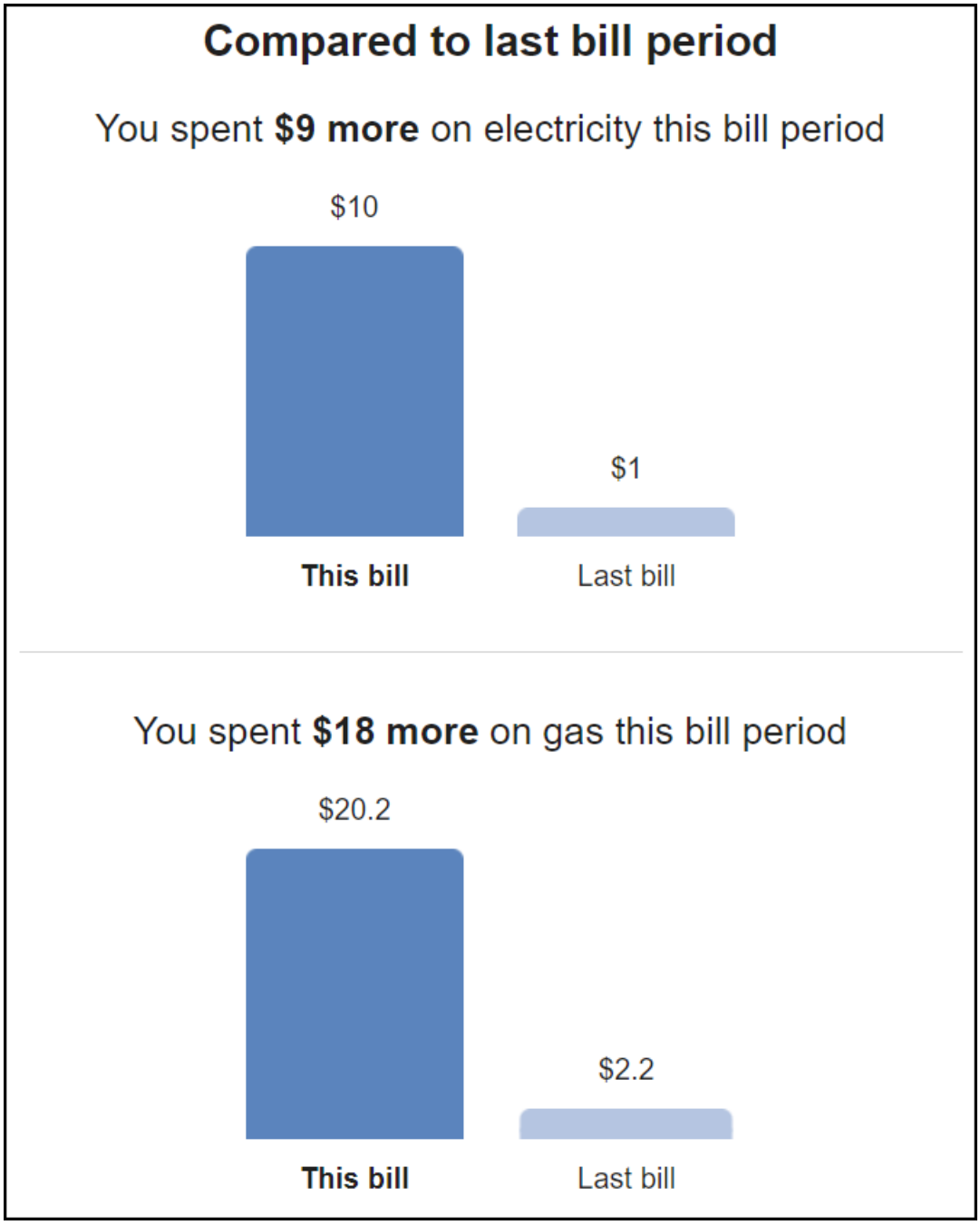
Post Bill - Bill Comparison Module

The Post Bill - Bill Comparison module provides customers with an at-a-glance look at their energy costs or usage this period compared to the previous period. Using icons and bar charts, this module is graphic and simple, making it easy to understand whether the customer did better or worse than the previous period. If the customer receives the cost version, a dollar amount is associated with each bar chart. If the customer receives the usage version, their energy usage is displayed in kWh for electricity and therms for gas.

> **Note**
>
> The Post Bill - Bill Comparison module is not included in Cost Tracker Report emails.

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 Option	Input Value
Header The header statement explains what the data in the chart is referring to. **Default**: Your spend compared to last bill period	**Optional** Choose one of the following: • Use the default statement. • Use the following statement:

Configuration Option	Input Value
Chart Colors The bar chart colors can be configured to use the utility's color palette.	**Optional** Work with your Delivery Team to customize the colors.
Period Names in Chart Utilities can configure the names of the billing periods. **Default**: This Period, Last Period	**Optional** Choose one of the following: • Use the default statement. • Use the following statement:

User Experience Variations

The user experience varies for customers depending upon their service types, available data, costs, and locale. Note that the following list indicates the primary user experience variations, not all possible variations.

Header Variations

In a dual fuel version of the module, the header statement is static, and reads as follows, depending on whether the email displays cost or usage:

- **Cost**: Your spend compared to last bill period
- **Usage**: Your usage compared to last bill period

In a single fuel version of the email, the header statement is also used as the insight statement and varies depending on:

- Whether cost or usage is displayed
- Which fuel is included in the email
- Whether the customer spent more, less, or about the same this period as the previous period. This controls which icon is displayed before the statement, as follows:
  - **Gray exclamation icon**: Displays when the customer spends or uses more this period compared to last period.
  - **Green check mark icon**: Displays when the customer spends or uses less this period compared to last period.
  - **No icon**: No icon is displayed when the customer spends or uses about the same amount this period compared to last period.

Single Fuel

If the email includes only one fuel (gas or electricity) only a single horizontal bar chart is displayed. The labels on the left of the bars take the place of the legend, and the usage or cost is displayed to the right of the bars. The header statement also can vary as previously described.

Usage Variation

If the module is set up to display usage instead of cost, the values in the chart are displayed as percentages instead of monetary amounts.

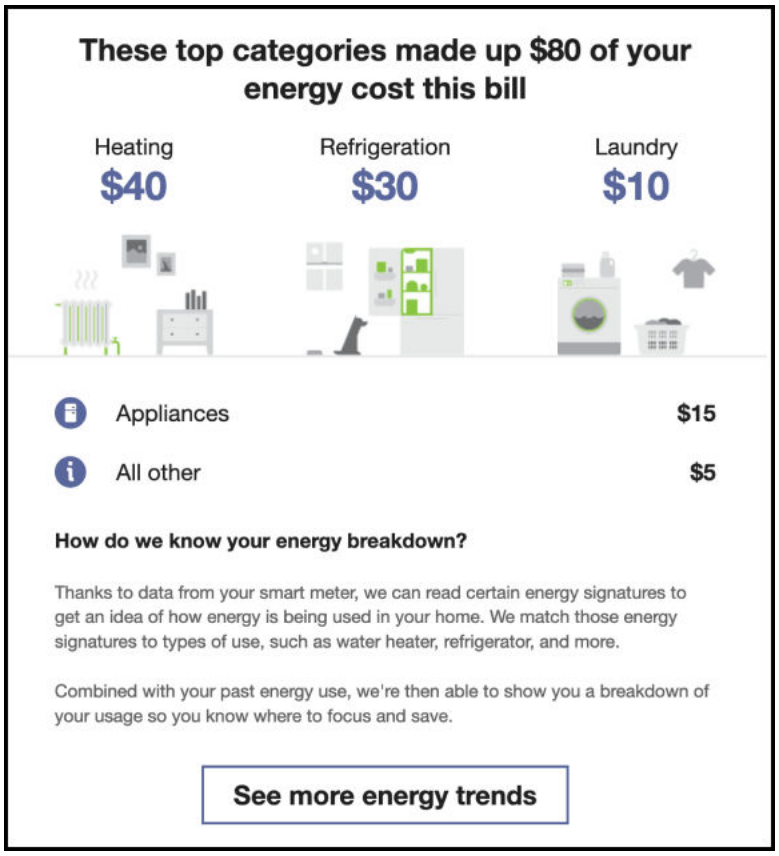
Post Bill End Uses Module

The Post Bill End Uses module breaks down how energy was used during the current bill period, and shows the customer what their top energy use categories are. Depending on the disaggregation modules the utility is using, the fuel type of the customer, and the customer data that is available, the module can display two or three top uses, and can also list additional categories that contributed to the customer's energy use.

The module explains to the customer how we are able to calculate the breakdown, and directs them to utility resources that can help them find additional information.

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 Option	Input Value
Top Uses Statement You can configure the initial statement of this module. **Default**: These top categories made up $X of your energy usage this bill	**Optional** Choose one of the following: • Use the default statement. • Use the following statement:
Main Category Display Names You can configure the names of the top use categories.	**Optional** Work with your Delivery Team to customize the names.
Display Additional Categories in Module You can display up to 9 additional end-use categories below the main categories that are displayed at the top of the module. The number of categories that can be displayed depends on the fuel type and the available data.	**Optional** Work with your Delivery Team to determine how many end use categories to display.
Button and Percentage Colors Button color and percentage color shown for the top end uses can be configured to match the utility's color branding.	**Optional** Work with your Delivery Team to customize the names.

Configuration Option	Input Value
Energy Breakdown Statement You can configure the statement to fit the needs of the utility. If you change the statement, be sure it fully explains how the utility is able to determine the customer's energy breakdown. **Default:** Thanks to data from your smart meter, we can read certain energy signatures to get an idea of how energy is being used in your home. We match those energy signatures to types of use, such as water heater,	**Optional** Choose one of the following: • Use the default statement. • Use the following statement:

Configuration Option	Input Value
refrigerator, and more. Combined with your past energy use, we're then able to show you a breakdown of your usage so you know where to focus and save.	
See More Energy Trends Button Utilities can configure the name and the target URL for the See More Energy Trends button. **Default Button Text:** See More Energy Trends	**Optional** Specify URL, and choose one of the following text options: • Use the default button text. • Use the following button text: • Specify URL:

User Experience Variations

The user experience varies for customers depending upon their service types, available data, costs, and locale. Note that the following list indicates the primary user experience variations, not all possible variations.

Display Two End Uses

If customers do not have enough information to determine their energy use in three top categories, then the top two categories can still be shown. This experience occurs only for gas-

only customers, since the number of end-use categories that can be displayed for the gas fuel type is smaller than for electricity customers.

Display Additional Categories Below Top End Uses

Electric or dual fuel customers that use the appliance detection and disaggregation models can see up to 12 end use categories. These additional end use categories can not be displayed for gas-only customers. Contact your Delivery Team for additional information about appliance disaggregation.

Usage Variation

You can display a usage variation of this module. When usage is displayed, the top uses statement reads, "These top categories made up <x%> of your energy usage this bill."

Gas-Only Customers

If this module is included in a gas-only communication, the maximum number of end-use categories that can be included is 3, which can include Heating, Water Heating, and Pool. Currently these are the only 3 gas-only end uses available.

Post Bill Always On Module

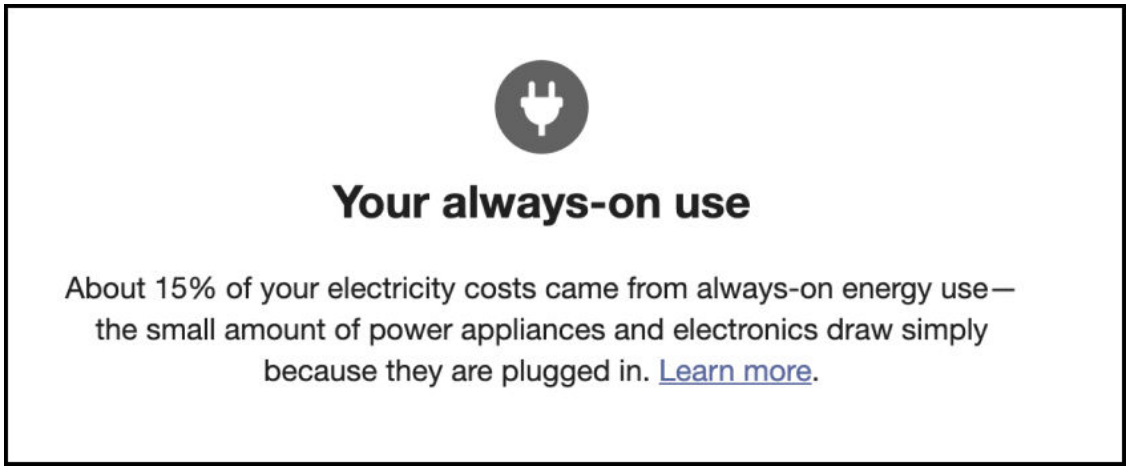
The Post Bill Always On module tells customers how much of their electric use is associated with things that are always on in their home. The amount, which is always displayed as a percentage, is due to electricity that is used by some appliances and electronics that use energy simply because they are plugged in.

The amount is calculated using the Always-on Disaggregation Model, which estimates the electricity consumption associated with appliances and electronics that consistently draw power even when they are off or in sleep mode, such as set-top boxes, gaming consoles, security systems, and digital assistants. It also estimates consumption for appliances which are always running, such as refrigerators.

At the end of the module, utilities can also direct users to a utility website that explains always-on usage.

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 Option	Input Value
Learn More Link The Learn more link at the end of the statement can be configured to point to a utility resource. The link can be removed if the utility does not have an appropriate website to direct customers to that can explain always-on usage in more detail. **Default**: Link is included. Utility must provide URL.	**Required** Choose one of the following: • Include the link and use the following URL: • Remove the link.

Personalized Tips Module

The Personalized Tips module provides customers with tips on how to reduce their energy use and bills based upon how the customer uses energy.

Design

This image shows an example of the 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

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.

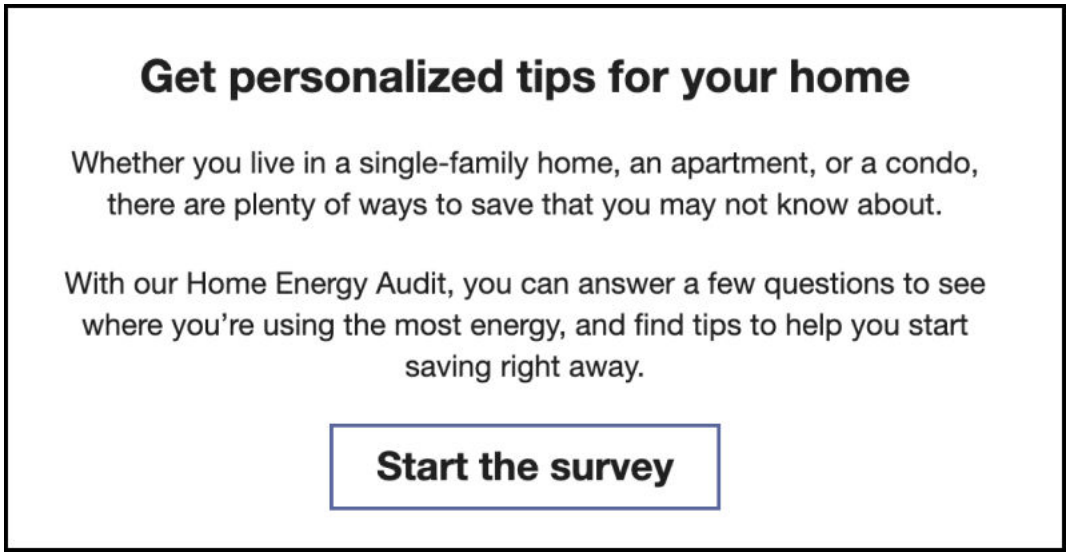
Configuration Option	Input Value
Tip Content The content of each tip focuses on an action that customers can take to reduce energy use, and how much customers can save by doing the action. **Default:** Varies by tip.	**Required** Contact Your Delivery Team to discuss which tips and content to include in your program. If the Oracle Utilities Opower Home Energy Reports are part of your program, you should talk to your Delivery Team about reviewing your tip library.
Number of Tips The number of tips to display as part of the module, which can range from one to three tips. **Default:** Three tips	**Optional** Provide the number of tips to display, which can be one, two, or three tips.
See More Ways to Save Button If available, the button directs users to the Digital Self Service - Energy Management Ways to Save, where customers can see the public-facing version of this page even if they have not signed in. Alternatively, you can configure this button to direct customers to an alternate page, or you can remove the button.	**Optional** Choose one of the following: • Do not include the button. • Use the following URL for the button:

Easy Open Module

The Easy Open module enables customers to easily access the Home Energy Analysis feature from their email communication without needing to sign in to their utility account. Removing this sign-in barrier increases engagement and customer satisfaction, and improves product functionality and the overall customer experience.

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:
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 Experience Variations

The user experience varies for customers depending upon their service types, available data, costs, and locale. Note that the following list indicates the primary user experience variations, not all possible variations.

Survey Completed

The Easy Open module is hidden for customers that have completed the Home Energy Analysis.

EV Load Shifting Insights in Weekly Energy Update Emails

The Load Shifting Cloud Service, Electric Vehicle (EV) provides insights that can be included in Weekly Energy Update (WEU) V3 emails and the Weekly Energy Update Post Bill Report V3 emails to create an EV-specific WEU experience for utility customers that own EVs.

Load shifting EV insights are provided within Load Shifting EV modules that are purpose-built to be included in the WEU V3 emails. These insights are designed to educate customers about their charging habits and encourage them to shift their charging to hours the utility prefers, such as when there is low demand on the grid or high availability of renewable energy.

These are the Load Shifting EV modules you can add to a Weekly Energy Update email:

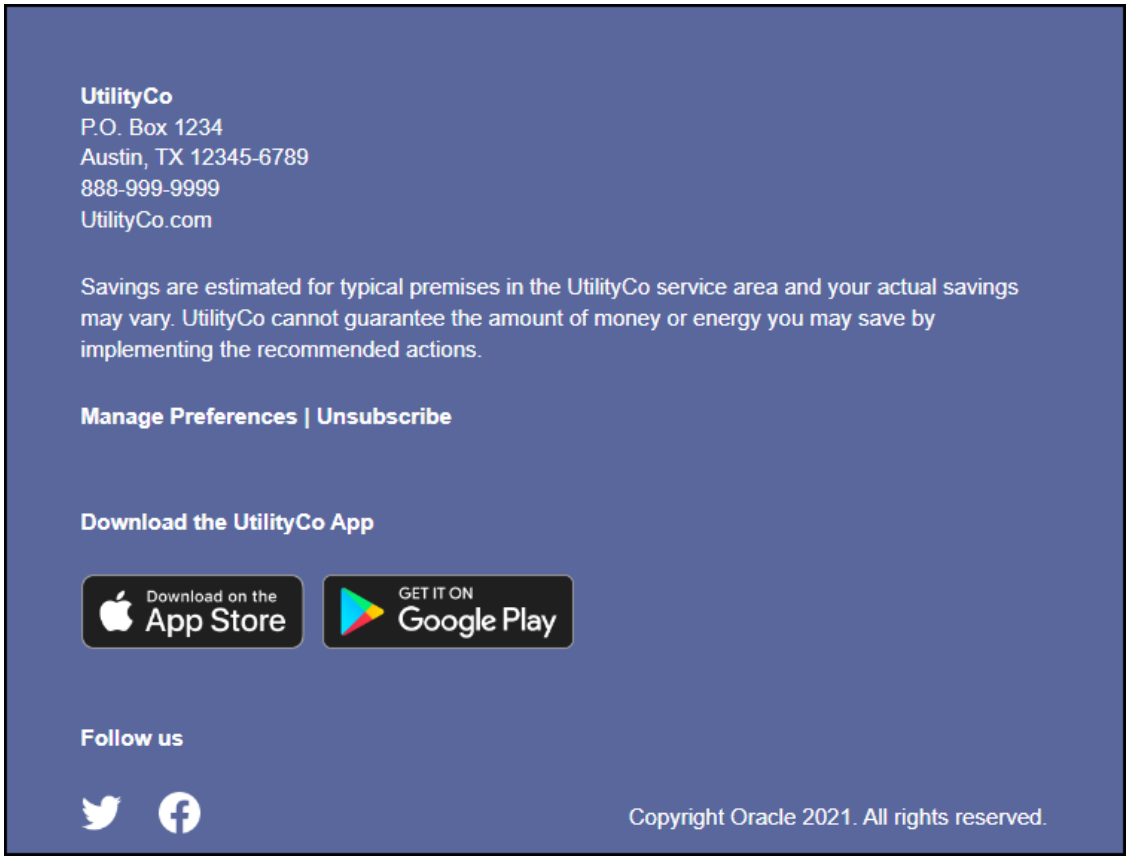
- EV Habits Checklist in Weekly Energy Update Emails Module: This module is included in the first EV-specific Weekly Energy Update email the customer receives, and then again every six months.
- EV Best Time Off-Peak in Weekly Energy Update Emails Module: This module is included in the second EV-specific Weekly Energy Update email the customer receives, and then again every six months.
- EV Load Shifting Main Insight in Weekly Energy Update Emails Module: This module is included in the Weekly Energy Update Post Bill Report email each month after the customer begins receiving the EV-specific emails.

Footer Module

The footer enables users to unsubscribe from the Weekly Energy Updates and includes legal text and utility contact information.

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 Option	Input Value
Manage Preference 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:

Configuration Option	Input Value
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:

4 Next Steps

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

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

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

5

Contact Your Delivery Team

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

To contact your Delivery Team:

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

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