

# Oracle Utilities Opower Rates Engagement

## Rates Engagement Configuration Guide



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# Rates Engagement Configuration Guide

Welcome to the Oracle Utilities Opower Rates Engagement configuration guide. Use this information to learn what configuration options are available for the Rates Engagement cloud service. Have a question? [Contact Your Delivery Team](#) or visit [My Oracle Support](#).

## Quick Links

- [Getting Started](#)
- [Design and Configuration](#)
- [Frequently Asked Questions \(FAQs\)](#)
- [Next Steps](#)

### 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.

# 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 documentation focuses on the configuration preferences for the Oracle Utilities Opower Rates Engagement cloud service.

## Product Overview

The Oracle Utilities Opower Rates Engagement cloud service enables customers to view energy cost insights and trends, learn about available rate plans, and view projected energy cost savings from joining a new rate plan. This information helps customers better understand the cost implications of their energy use, and empowers them to be more energy efficient.

The layout of Rates Engagement web features is responsive so that the functionality can display correctly on mobile as well as desktop displays. This design allows for a single version of a website that automatically adjusts based on the customer's screen size and orientation. Note that the responsive design can cause user experience variations because the components of a widget may be hidden or adjusted. For example, separate navigation options can be combined into a single drop-down list on smaller screen sizes.

Be aware that adjustments to account for smaller screen sizes can cause the appearance of widgets to be different than the images provided as configuration option examples. Additionally, the width of widgets that are embedded in containers is restricted by the container. This can cause embedded widgets to switch to smaller, responsive layouts at larger, overall screen sizes as compared to widgets that can utilize the full width of the page.

For information on the requirements and steps to embed widgets, see the Oracle Utilities Opower Embeddable Widgets Integration Guide.

## Disclaimers

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

# 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.

## Global Design and Configuration

In addition to the product-specific configuration options, the following configuration details apply broadly:

- **Color Palette:** Oracle Utilities uses the utility branding guidelines to configure colors including the primary color, efficient neighbors color, and the You color. These colors are applied across all products to provide a consistent look and feel. Utilities provide colors as part of the utility branding guidelines in the Oracle Utilities Opower Platform Configuration Guide.
- **Fonts:** Oracle Utilities recommends using the default fonts. Non-default fonts are supported only for embedded widget deployments. Requests by the utility for non-default fonts must meet all applicable font licensing requirements and support any required character sets. Licensing requirements may require the utility to transfer font license ownership to Oracle Utilities.
- **Additional Global Configurations:** Review all additional configuration options provided in the Oracle Utilities Opower Platform Configuration Guide.

## Rates Light

The Rates Light widget is a dashboard-friendly tool designed to help customers quickly view and compare utility rate plans. Customers can use the widget to understand at a glance whether they are on the best rate, and if not, which plan is recommended. The widget directs customers to the detailed Rate Comparison Feature for a more in-depth comparison.

### Rates Light Example

The image below is an example of the Rates Light widget.

## Your electric rate plan

Woodlands #23-B

You are **not** on the lowest cost rate plan.

You could save **\$800 per year** if you switch to **Time of Day 3-8pm**

**Change your plan**

Current	Recommended
Tiered Monthly	Time of Day 3-8pm
<b>\$2,600</b> per year	<b>\$1,800</b> per 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 Option	Input Value
<p><b>Show Compact Widget</b></p> <p>A more compact version of the Rates Light widget can be displayed. In this state, the widget shows the customer's rate plan status, potential yearly savings, and a call-to-action to change their plan. The detailed rate comparison cards are hidden for a cleaner, smaller display. This option applies only to the vertical layout and only when customers are not on the lowest cost rate plan. (In the horizontal layout, the detailed cards always appear.)</p> <p><b>Default:</b> The full version of the widget with detailed rate comparison cards is shown.</p>	<p><b>Optional</b></p> <p>Choose one of the following:</p> <ul style="list-style-type: none"> <li>• Use the default option.</li> <li>• Enable compact mode for vertical layout only (hides detailed cards for eligible customers in vertical orientation).</li> </ul>
<p><b>Change Call-to-Action Format</b></p> <p>The call-to-action button can be changed to text and a phone number. This gives customers the option to initiate a plan switch by calling the provided number.</p> <p><b>Default:</b> A button appears as the call-to-action.</p>	<p><b>Optional</b></p> <p>Choose one of the following:</p> <ul style="list-style-type: none"> <li>• Use the default option.</li> <li>• Display clickable text and phone number as the call-to-action (allows customers to call to make the switch).</li> </ul>
<p><b>Always Show Horizontal Comparison Cards in Vertical Widget</b></p> <p>The rate comparison cards can be displayed horizontally (side by side) even when the widget is in its vertical orientation, instead of stacking the cards vertically. This option is especially recommended for clients with very long rate plan names, business customers with high total costs, or for use in locales with longer messages or monetary values.</p> <p>This setting is automatically activated—regardless of manual configuration—if either card's rate plan title exceeds two lines, or if the cost value including "per year" does not fit on one line.</p> <p><b>Default:</b> Cards are stacked vertically in the vertical orientation, unless the rate plan title or cost values exceed the supported length.</p>	<p><b>Optional</b></p> <p>Choose one of the following:</p> <ul style="list-style-type: none"> <li>• Use the default option.</li> <li>• Force cards to always display horizontally in the vertical orientation (side by side).</li> </ul>
<p><b>Change Text Alignment</b></p> <p>The alignment of the widget content can be changed to left alignment. This can be useful for matching the widget's appearance with other left-aligned content on a web page.</p> <p><b>Default:</b> All content in the widget is center aligned.</p>	<p><b>Optional</b></p> <p>Choose one of the following:</p> <ul style="list-style-type: none"> <li>• Use the default option</li> <li>• Enable left alignment (all content in the widget is left aligned).</li> </ul>

## User Experience Variations

The user experience varies for customers depending upon their service types, available data, costs, and locale. For more information, see Rates Light in the *Rates Engagement Cloud Service Overview*.

## Rate Comparison

The Rate Comparison feature allows customers to see an overview of rate plans for which they are eligible, estimated cost information, and details about each rate plan option. Customers can compare rate plans in terms of estimated annual costs and quickly identify their cheapest

rate. Further rate analysis is available through additional rate details and the ability to perform what-if scenarios representing energy use choices the customer can make.

### Rate Plan Information

Rate plan information from the utility is a major component of configuring the Rate Comparison. The rate plan requirements are summarized below, followed by images that show standard examples of the Rate Comparison and its primary configuration options.

- **Rate Plans and Rate Attributes:** Rate information is structured as a rate plan which can include additional rate attributes. The rate plan describes the main purpose, details, and important information about a rate. Rate attributes supply additional information and can be applied to one or more rate plans. A customer's eligibility is used to determine their available rate plans, and any applicable rate attributes for their eligible rate plans. When providing rate configuration information, be aware that the rate plans displayed to users are a combination of the rate plan information and the applicable rate attributes.
- **Rate Eligibility:** When a customer visits the Rate Comparison, they are presented with information and costs for their current rate and the other eligible rate options. Utilities must supply rate eligibility information which defines for each rate plan the additional rate plans a customer is eligible for. Contact your Oracle Utilities Opower [Delivery Team](#) for support in creating a rate eligibility matrix.

When defining rate eligibility for each rate plan, utilities must consider base rate plans as well as rate attributes. It is not required to have different rate eligibility for each rate attribute, but it is common for rate attributes to affect rate eligibility. For example, customers on a time-of-use rate plan without any attributes may be able to switch to a flat rate plan, but customers on the same time-of-use rate plan who have the solar attribute are not able to switch to a flat rate plan.

## Configuration Options

There are configuration options for the rate widget and the rate plans that are shown in the components of the widget.

- [Rate Comparison Widget Configurations](#)
- [Rate Plan Details Configurations](#)
- [Rate Simulator Configurations](#)

## Rate Comparison Widget Configurations

The Rate Comparison widget displays high-level information about a customers rate plan relative to other available rate plans.

 Your estimated costs do not take into account your enrollment in the [Budget Billing](#) program

## Rate Comparison

### Your lowest cost rate plan

Based on your electricity use history, you'll save the most on the **Standard Offer Service** rate plan.

**Your Current Rate**



#### Time of Use

**Ideal for:** Customers who can shift energy usage during the day to periods when prices are lowest.  
**Peak Plan:** Price varies throughout the day. It's highest on weekdays between 10am - 8pm.

**\$1,515**  
Estimated cost per year

[Learn more](#)

**Lowest Cost | Save \$160**



#### Standard Offer Service

**Ideal for:** Customers who prefer not to shift their energy usage based on time of day pricing  
**Standard Price Plan:** Price remains consistent throughout the day

**\$1,355**  
Estimated cost per year

[Learn more](#)

[Change your rate plan](#)



### Shifting your energy habits can lower your costs.

Answer a few questions about your energy habits to see how your costs change.

[Go to rate simulator](#)

### Compare all rate plans

**Lowest Cost Rate**

Standard Offer Service	\$1,355/year
<b>Ideal for:</b> Customers who prefer not to shift their energy usage based on time of day pricing	
<b>Standard Price Plan:</b> Price remains consistent throughout the day	

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

Configuration Option	Input Value
<b>Rate Plan Switch Call-to-Action</b> A call-to-action and phone number for customers to change their rate is provided. <b>Default:</b> Ready to switch rate plans? Call us at XXX-XXX-XXXX	<b>Required</b> Choose one of the following: <ul style="list-style-type: none"> <li>• Use default messaging and provide a phone number.</li> <li>• Provide a URL that allows customers to request a rate plan change.</li> <li>• Hide the call-to-action.</li> </ul>
<b>Rate Comparison Disclaimer</b> Legal disclaimer messaging is shown at the bottom of the Rate Comparison component.	<b>Required</b> Provide any applicable legal disclaimer text.
<b>Title</b> The main title for a rate plan. <b>Example:</b> Time of Day 3-8pm <b>Requirements:</b> 40 character maximum.	<b>Required</b> Provide the main title for the rate plan.
<b>Summary</b> Rate plan summary information included for rate comparisons. <b>Example:</b> <ul style="list-style-type: none"> <li>• <b>Best for:</b> Homes with low energy use</li> <li>• <b>Price highest:</b> Weekdays 3pm - 8pm</li> </ul> <b>Requirements:</b> Three bullet maximum, 60 characters per bullet maximum.	<b>Required</b> Provide the rate plan summary.

## Rate Plan Details Configurations

The Rate Plan Details includes rate titles, descriptions, and other more specific rate plan information to users. This required content must be provided for each rate plan, and thus must be completed for each rate plan. In addition to the required configurations, optional content can also be included for each rate plan. This content is also optional for each rate attribute, which are displayed as part of applicable rate plans.



Your estimated costs do not take into account your enrollment in the [Budget Billing](#) program

## Rate Details

[Back to all rates](#)

Rate plan

Standard Offer Service

Estimated cost

\$1,355 /year

### About this rate plan

UTIL's Standard Offer Service (SOS) is ideal for customers who prefer not to shift energy usage based on prices that change by time of day.

On this plan, customers are able to use energy throughout the day at consistent pricing - the price will not change based on time of the day.

Last year, this rate plan would've saved you \$160.

\$1,355/year

\$1,515/year

This rate  
Standard Offer Service

Your current rate  
Time of Use

### Rate plan breakdown

Energy costs the same throughout the day

Customers have the option of purchasing electricity from third party suppliers who may offer lower pricing. If no choice is made, UTIL chooses an alternative electricity supplier. This supplier is called Standard Offer Service (SOS) that charges customers for their electricity use as approved by the Maryland Public Service Commission. For customers who choose a third party supplier, UTIL remains the energy delivery company and will continue to respond to power outages and other emergencies.

### Monthly estimated costs

Your highest bill on this rate plan: \$184

Your current rate: Time of Use

Comparison rate: Standard Offer Service

	Jan 24	Feb 24	Mar 25	Apr 24	May 23	Jun 24	Jul 24	Aug 22	Sep 23	Oct 23	Nov 22	Dec 23	Annual Total
Your current rate	Highest \$210	\$195	\$127	\$113	\$85	\$111	\$115	\$100	Lowest \$78	\$91	\$124	\$167	\$1,515
Comparison rate	Highest \$184	\$171	\$110	\$97	Lowest \$73	\$104	\$110	\$96	\$75	\$79	\$108	\$147	\$1,355

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

Configuration Option	Input Value
<b>Rate Plan Switch Call-to-Action</b> A call-to-action and phone number for customers to change their rate is provided. <b>Default:</b> Ready to switch rate plans? Call us at XXX-XXX-XXXX	<b>Required</b> Choose one of the following: <ul style="list-style-type: none"> <li>• Use default messaging and provide a phone number.</li> <li>• Provide a URL that allows customers to request a rate plan change.</li> <li>• Hide the call-to-action.</li> </ul>
<b>Rate Details Disclaimer</b> Legal disclaimer messaging is shown at the bottom of the Rate Details component.	<b>Required</b> Provide any applicable legal disclaimer text.
<b>Title</b> The main title for a rate plan. <b>Example:</b> Time of Day 3-8pm <b>Requirements:</b> 40 character maximum.	<b>Required</b> Provide the main title for the rate plan.
<b>Headline</b> Short description that highlights how the plan works and why a customer would want to select the plan. <b>Example:</b> The price of energy depends on your monthly overall use. <b>Requirements:</b> One or two paragraphs and 100 character maximum.	<b>Required</b> Provide the rate plan headline.
<b>Description</b> Additional information about the rate plan which is not covered in the rate plan headline. <b>Example:</b> On this plan, customers are rewarded for reducing their energy use during periods of high demand. If your household uses less energy in the afternoon and early evening, this plan can help you save on your energy bills. <b>Requirements:</b> 350 character limit.	<b>Required</b> Provide the rate plan description.
<b>Frequently Asked Questions</b> Common questions and answers to increase customer knowledge and confidence. <b>Example:</b> <ul style="list-style-type: none"> <li>• Question: Why are you recommending rates to me?</li> <li>• Answer: Research shows that customers do not know why a utility would offer them cheaper rate plans, and generally have distrust of the concept.</li> </ul> <b>Requirements:</b> Questions use a 100 character maximum and answers use a 350 character maximum.	<b>Optional</b> Provide the messages for each question and answer pair.

## Rate Simulator Configurations

The Rate Simulator prompts customers to answer a few short questions about how they might change their energy use.

How much can you reduce your use of major appliances on weekdays from 3pm - 8pm?

Time-of-Use rate plans offer lower prices during off-peak hours when electricity supply costs are lower.

I will turn off small appliances, run half of my dishwasher and washer/dryer loads during off-peak hours, and increase my thermostat by 5 degrees in the summer.

I will turn off small appliances (e.g. lights, televisions, computers and game consoles) in unoccupied rooms.

I can't reduce any of my energy use during peak hours.

[Skip this question](#)

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

**Table 3-1 Configuration Options**

Configuration Option	Input Value
<b>Disable the Rate Simulator</b> The Rate Simulator survey can be hidden. <b>Default:</b> Enable the Rate Simulator.	<b>Required</b> Choose one of the following: <ul style="list-style-type: none"><li>• Use the default.</li><li>• Disable the Rate Simulator.</li></ul>
<b>Rate Simulator Time of Use Hours</b> The hours presented to the customer in the question related to shifting energy use to avoid peak times. <b>Default:</b> 3:00pm to 8:00pm	<b>Required</b> Choose one of the following: <ul style="list-style-type: none"><li>• Use the default.</li><li>• Provide peak hours timeframe.</li></ul>
<b>Rate Simulator Peak Event Hours</b> The hours presented to the customer in the question related to reducing energy use during peak events. <b>Default:</b> 3:00pm to 8:00pm	<b>Required</b> Choose one of the following: <ul style="list-style-type: none"><li>• Use the default.</li><li>• Provide peak event hours timeframe.</li></ul>
<b>Rate Simulator Peak Event Days</b> The number of days presented to the customer in the question related to reducing energy use during peak events. <b>Default:</b> 15 days	<b>Required</b> Choose one of the following: <ul style="list-style-type: none"><li>• Use the default.</li><li>• Provide the number for peak event days to present in the Rate Simulator. These days are also used to determine the number of peak days modeled in the appropriate calculations.</li></ul>

**Table 3-1 (Cont.) Configuration Options**

Configuration Option	Input Value
<b>Rate Simulator Electric Vehicle Question (Not Depicted)</b> The question about whether the customer plans to purchase an electric vehicle (EV) can be shown. <b>Default:</b> Disabled.	<b>Optional</b> Choose one of the following: <ul style="list-style-type: none"><li>• Use default.</li><li>• Enable the question.</li></ul>

## User Experience Variations

The user experience varies for customers depending upon their service types, available data, costs, and locale. For more information, see Rate Comparison in the *Rates Engagement Cloud Service Overview*.

## Embedded Widget Configurations

If you are embedding widgets on your website using custom events, you must provide the full URLs of the web pages in which the widgets are embedded. For information on embedding widgets using custom events, see the [Oracle Utilities Opower Embeddable Widgets Integration Guide](#).

## Embedded Widget URLs

Provide the URLs for all of the widgets you choose to embed on your website. For rows that include multiple widgets the recommendation is to embed all widgets on the same page. If you choose to embed the widgets on separate pages, provide all applicable URLs and the corresponding widget. Ensure you provide the complete URL.

Feature and Widget Names	URL
<a href="#">Rates Light</a> widget-rates-lite	
<a href="#">Rate Comparison</a> widget-rates	

# 4

## Frequently Asked Questions (FAQs)

This section offers answers to frequently asked questions (FAQs) about Rates Engagement design options.

### What is the process for embedding a widget in our page?

A widget is embedded using JavaScript that can be placed wherever appropriate in your web page. Your team will not need to change the script tag unless you want to change what content is displayed. The latest available version of the widget will always be displayed.

Your team must provide a mapping of embedded widgets and all page URLs in which each widget is embedded. Any updates to the locations where the widget is embedded must be communicated to Oracle Utilities Delivery Team in advance of deploying the widget to the new location. Refer to [Embedded Widget Configurations](#) to provide the page URLs for embedded widgets.

For the complete requirements and steps of the embedding process, refer to the Oracle Utilities Opower Embeddable Widgets Integration Guide.

### Will a widget's script tag conflict with the JavaScript or CSS framework we are using?

No. The embedded content is contained within an iframe or HTML 5 custom events, which creates a barrier between your CSS and JavaScript code and the code provided by Oracle Utilities. The JavaScript code provided by Oracle Utilities is compatible with any JavaScript and CSS library, including any version of jQuery, Backbone, Angular, and Bootstrap.

### Is the embedding process secure?

Yes. Embeddable widgets use the OpenID Connect secure protocol to authenticate users that interact with Oracle Utilities embedded widgets. See the Oracle Utilities Opower Embeddable Widgets Integration Guide for more information.

### Are the widgets responsive?

Yes, widgets are responsive and work across many screen sizes. Some features, such as the Home Energy Analysis, include widgets that are only available as full-page widgets.

See the Oracle Utilities Opower Embeddable Widgets Integration Guide for information on which widgets are embeddable.

### What is the minimum resolution to display widgets?

A minimum width of 320 pixels is required for devices to display widgets.

# 5

## Next Steps

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

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

 **Note**

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

# 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](#).