Oracle Utilities Opower Rates Engagement

Rates Engagement Overview Guide

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Rates Engagement Cloud Service Overview

Welcome to the Rates Engagement cloud service overview. Use this information to learn about the features and capabilities of the Oracle Utilities Opower Rates Engagement cloud service. Have a question? Contact Your Delivery Team or visit My Oracle Support.

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2 Getting Started

The Rates Engagement cloud service enables customers to view energy cost insights and trends, learn about available rate plans, and view projected energy cost savings. This information helps customers better understand the cost implications of their energy use, and empowers them to be more energy efficient. See Rates Engagement for more information on what is included.

For an overview of all cloud services available from Oracle Utilities, see the Oracle Energy and Water Cloud Service Descriptions online at Oracle Contracts - Cloud Services Service Descriptions.

Note that each cloud service comes with a set of requirements that must be met in order for customers to receive the Opower products. See Requirements and Limitations for details.

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Requirements and Limitations

The Rates Engagement cloud service comes with a set of data requirements and limitations. The requirements must be met for a utility and a customer to participate in the program.

Utility Requirements

- **Cloud Service Requirement**: In order to purchase the Rates Engagement cloud service, utilities must also purchase the following cloud services:
  - Digital Self Service - Energy Management
  - Digital Self Service - Energy Management AMI
- **Rates Data Transfer**: The utility must send rates data to Oracle Utilities in the correct schema and at the appropriate frequency. See Oracle Utilities Opower Rates Data Transfer for details.
- **Rates Modeling**: Rates modeling is required during initial program setup, and is not included in the cost of the cloud service. See Rate Modeling for more information.

Customer Requirements

- **Billing Frequency**: Customers must be billed on a monthly, bimonthly, or quarterly basis.
- **AMI Data**: Customers must have daily or sub-daily AMI reads.

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Rates Engagement

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 following components are available in this service:

- Rate Engine
- Rates Engagement - Web
- Rate Education Reports - Print
- Rate Education Reports - Email

Rate Engine

The Oracle Utilities Opower Rate Engine is a computing model that relies on rate configuration data, rate plan data, and customer energy use data as its primary inputs. These inputs are then used to perform rate calculations for features like the Bill Comparison, Bill Forecast, and Data Browser Costs View. These features help customers make smarter choices about their energy use.

Note that the Rate Engine is not designed to be a billing-grade engine. Its purpose is to convert customer energy use values to dollar values, and to then deliver estimated cost insights and trends based on those dollar values. These insights are valuable because cost information is typically easier for customers to understand and act upon than energy use information.

The Rate Engine is set up and configured as part of a comprehensive rates modeling process conducted by your Oracle Utilities Delivery Team. See Rates Modeling for details.

Rates Modeling

Rates modeling is the process by which Oracle Utilities configures the Rate Engine to consume rates data from utilities and calculate personalized cost insights for customers. Rates modeling is required at an additional fee when setting up the Rates Engagement cloud service.

> **Note**
>
> The Oracle Utilities Opower rates modeling process can be carried out for residential and commercial customers. For commercial customers, an initial assessment is needed to determine if your business rate structure can be supported. Contact your Delivery Team for more information.

Your Delivery Team will work closely with you to complete the rate modeling process. The high-level steps include:

1. Identify which rate plans need to be modeled and acquire the appropriate documentation. Often, such documentation includes a rate tariff document describing the terms and conditions of a utility's rate plan, as well as examples of bills and usage charges.
2. Determine what data is currently being sent in the `usage_charge` field in the Legacy Billing Data Usage Fields. This lets Oracle Utilities know which costs to model in the Rate Engine. For example, if taxes are included in the data for that field, then taxes should be modeled in the Rate Engine. If taxes are not included in that field, then they should not be modeled.
3. Analyze the rate plan documentation to understand how a utility's rates are calculated. Tasks in this step may include:
   - Conduct meetings as needed with rates subject matter experts at the utility to verify how the rate plans work
   - Identify what rates data needs to be imported into the Oracle Utilities Opower data platform.
   - Determine whether existing rate calculators in the Oracle Utilities Opower Rate Engine can be used to calculate the rates, or if a new custom rate calculator needs to be developed. A "rate calculator" is a piece of code that generates cost information. While there is a set of generic rate calculators in the Rate Engine that can be configured to support different rate plans, sometimes a new calculator must be created to support a utility's unique situation. The Rate Engine has calculators for common scenarios such as tiered rate plans, time-of-use rate plans, and flat charges.
4. Send the Oracle Utilities Opower Rates Data Transfer documentation to the utility to begin establishing a regular feed of rates data.
5. Import rates data from the utility and test that cost insights are being calculated and displayed in the relevant web features as expected.

Rates Engagement - Web

The Rates Engagement cloud service includes various cost insights and features for the web.

- Cost insights in the Bill Comparison
- Cost insights in the Bill or Usage Forecast
- Cost insights in the Data Browser
- Cost information in Green Button - Download My Data
- Rates Light
- Rate Comparison

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.

Requirements

Utility Requirements

Category	Description
Required Cloud Service(s)	Both of the following cloud services are required: • Digital Self Service - Energy Management • Digital Self Service - Energy Management AMI Additionally, *one* of the following cloud services is required: • Rates Engagement Cloud Service • Advanced Rates Engagement Cloud Service
Scale	No scale limitations.

Customer Requirements

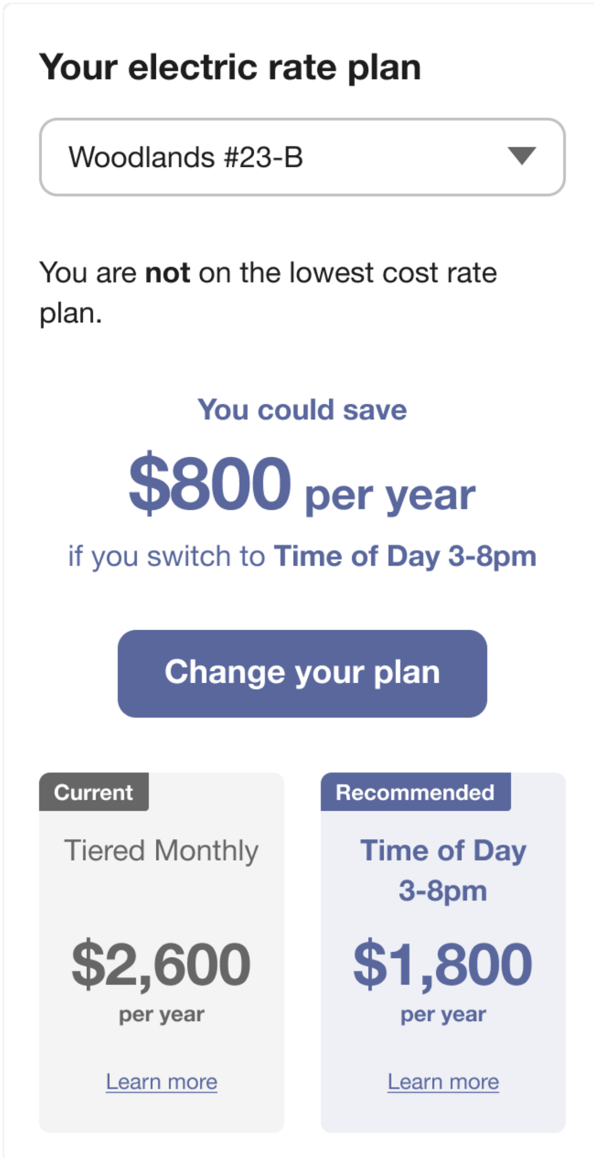
Category	Description
Billing Frequency	Monthly.
Data Delivery Frequency	Monthly.
Data Requirements	**Billed Usage Data:** Billed data is required to determine if a customer is on the best rate. **Interval Data:** AMI data (daily or subdaily) is required. **Rates Data:** Rates must be modeled. Additionally, rate plan eligibility and rate plan information are required, such as the name and type of each rate plan (for example, standard or time-of-use), eligibility rules, pricing details, tier structures, and special conditions. Your Delivery Team will work with you to collect this information.
Data History	**Minimum:** At least 270 days of AMI data must be available, as well as nine months of billing data (that is, nine bills). **Recommended:** A full year (12 months) of billing data history. This will result in more accurate rate plan comparisons. If less than a year of data is available, the widget can still display, but with less information. See Insufficient Data History.
Data Coverage	By default, the customer must have at least 270 days of AMI data available, and a minimum of 75% of AMI reads from this period must be available. If required AMI, billing, or rate plan data is missing, the widget will not display any experience to avoid presenting inaccurate information.
Supported Fuels	Electricity.

Limitations

The widget only presents rate plans that customers are eligible for. This ensures that the information is relevant to the customer. If the customer is only eligible for one rate plan, then only one will be shown, along with a link to more information about that plan.

User Experience

This section describes the user experience for electricity customers who have multiple service points and are eligible for two or more rate plans.



Title: The title at the top of the widget tells customers that the information shown relates to their current and potential electricity pricing plans.

Service Point Selector: This drop-down menu appears for customers who have multiple service points. A service point is the specific location at which energy is delivered to (or from) a building or home. The rate plans shown are based on the selected service point. (For customers who do not have multiple service points, this menu is hidden.)

Rate Plan Status Insight: This simple text message informs customers whether or not they are currently using the most cost-effective plan available.

Potential Savings Message: This section highlights how much money customers could save annually by switching to the recommended plan. It names the specific alternative plan and displays the estimated yearly savings in large, bold numbers.

Call-to-Action: This is a clickable button that lets customers start the process of switching their current rate plan to the recommended one. When clicked, customers are taken to a utility-defined web page with information about how to switch. Alternatively, the call-to-action can show text and a clickable phone number that customers can use to initiate a phone call with their utility company and switch their plan.

Current Plan Summary: This card shows details about customers' present rate plan, including its name (such as "Tiered Monthly") and the estimated annual cost. **Learn more** leads to the Rate Details page for the current plan, which shows additional information about the plan's structure and pricing.

Recommended Plan Summary: This card compares customers' current plan with the recommended alternative, showing its name and lower yearly estimated cost. **Learn more** leads to the Rate Details page for the recommended plan, which shows additional information about the plan's structure and pricing.

User Experience Variations

Already on Lowest Plan

If the customer is already on the lowest rate plan, a message displays to say so. Customers also see the current rate plan name and a green circled checkmark that provides a visual cue, as well as a link to see all rate plans available to them. No comparison to another plan is shown.

Compact Layout (No Rate Plan Cards)

Depending on your setup and configuration, a more compact version of the Rates Light widget can be shown. The widget shows the customer's rate plan status, potential yearly savings, and a call-to-action to change their plan. However, the detailed rate comparison cards are hidden, providing a cleaner and smaller display.

The compact widget state can only be used for the vertical layout of the widget, and for customers who are not already on the lowest cost rate plan. (If the horizontal layout is used, the detailed cards are shown.)

Insufficient Data History

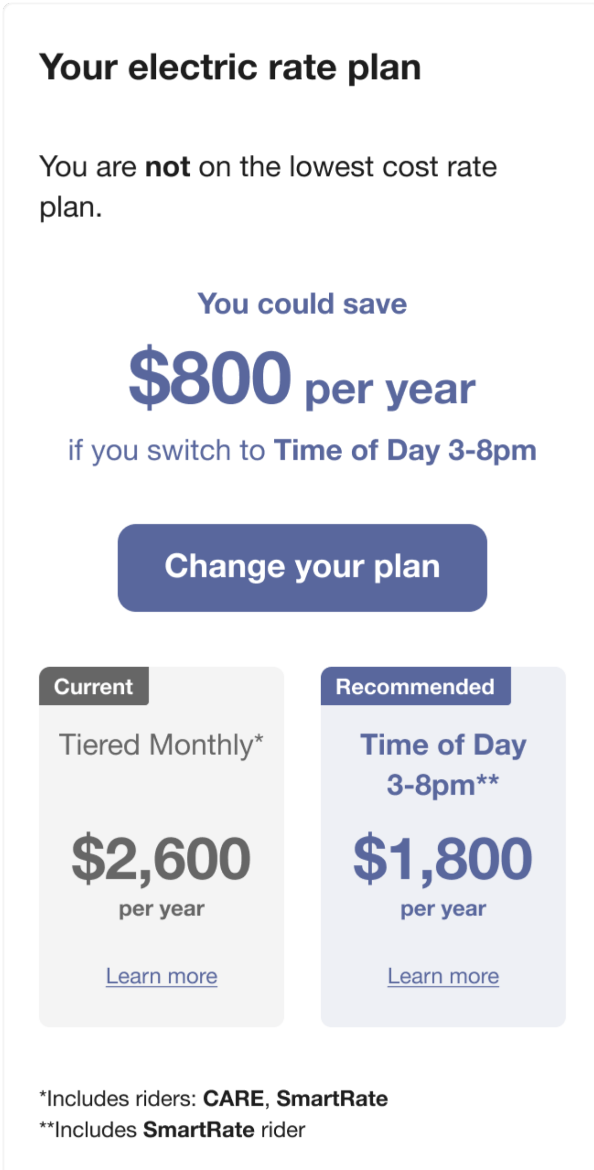
For customers who do not have a full year of historical billing data, the widget displays the customer's current rate plan and a link to explore other plans. By default, the link is configured to go to the Rate Comparison page. The widget shows no call-to-action, and there is no comparison of eligible rate plans to which the customer can switch.

Only One Rate Available

For customers who only have one available rate plan, the widget displays the customer's current rate plan and a link to more details about it. By default, the link is configured to go to the Rate Details page. The widget shows no call-to-action, and there is no comparison of eligible rate plans to which the customer can switch.

Rate Riders

If a customer's current plan or the recommended plan includes any riders, a footnote appears below the comparison cards, listing the specific riders included in each rate plan.



A “rider” is an additional feature or adjustment that can be added to a customer’s electricity rate plan. Riders are usually optional or apply to specific groups of customers, and they modify how the total bill is calculated—either by adding extra charges, discounts, or special rules. In this case, when customers click **Learn more**, they will see additional rate details, including all relevant rider information, providing a complete picture to guide their decision. This helps customers make informed choices by clearly showing which special rate characteristics are factored into the estimated annual costs for each plan.

Vertical Layout

Depending on your setup and configuration, the widget may display the rate plan cards vertically stacked on one another. The widget may also switch to the vertical layout automatically based on the length of the currency values or the rate plan name length. For example, business customers may see longer cost values, in which case the widget may automatically switch to the vertical layout.

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.

Requirements

Utility Requirements

Category	Description
Required Cloud Service(s)	The following cloud services are required: • Digital Self Service - Energy Management • Digital Self Service - Energy Management AMI • Rates Engagement Cloud Service
Scale	No scale limitations.

Customer Requirements

Category	Description
Billing Frequency	Monthly.
Data Delivery Frequency	Monthly.
Data Requirements	**Billed Usage Data:** Billed data is required to determine if a customer is on the best rate. **Interval Data:** AMI data (daily or subdaily) is required. **Rates Data:** Rates must be modeled. Additionally, rate plan eligibility and rate plan information are required, such as the name and type of each rate plan (for example, standard or time-of-use), eligibility rules, pricing details, tier structures, and special conditions. Your Contact Your Delivery Team will work with you to collect this information.
Data History	**Minimum:** At least 270 days of AMI data must be available, as well as nine months of billing data (that is, nine bills). **Recommended:** A full year (12 months) of billing data history. This will result in more accurate rate plan comparisons.
Data Coverage	By default, the customer must have at least 270 days of AMI data available, and a minimum of 75% of AMI reads from this period must be available. If required AMI, billing, or rate plan data is missing, the widget will not display any experience to avoid presenting inaccurate information.
Supported Fuels	Electricity.

User Experience

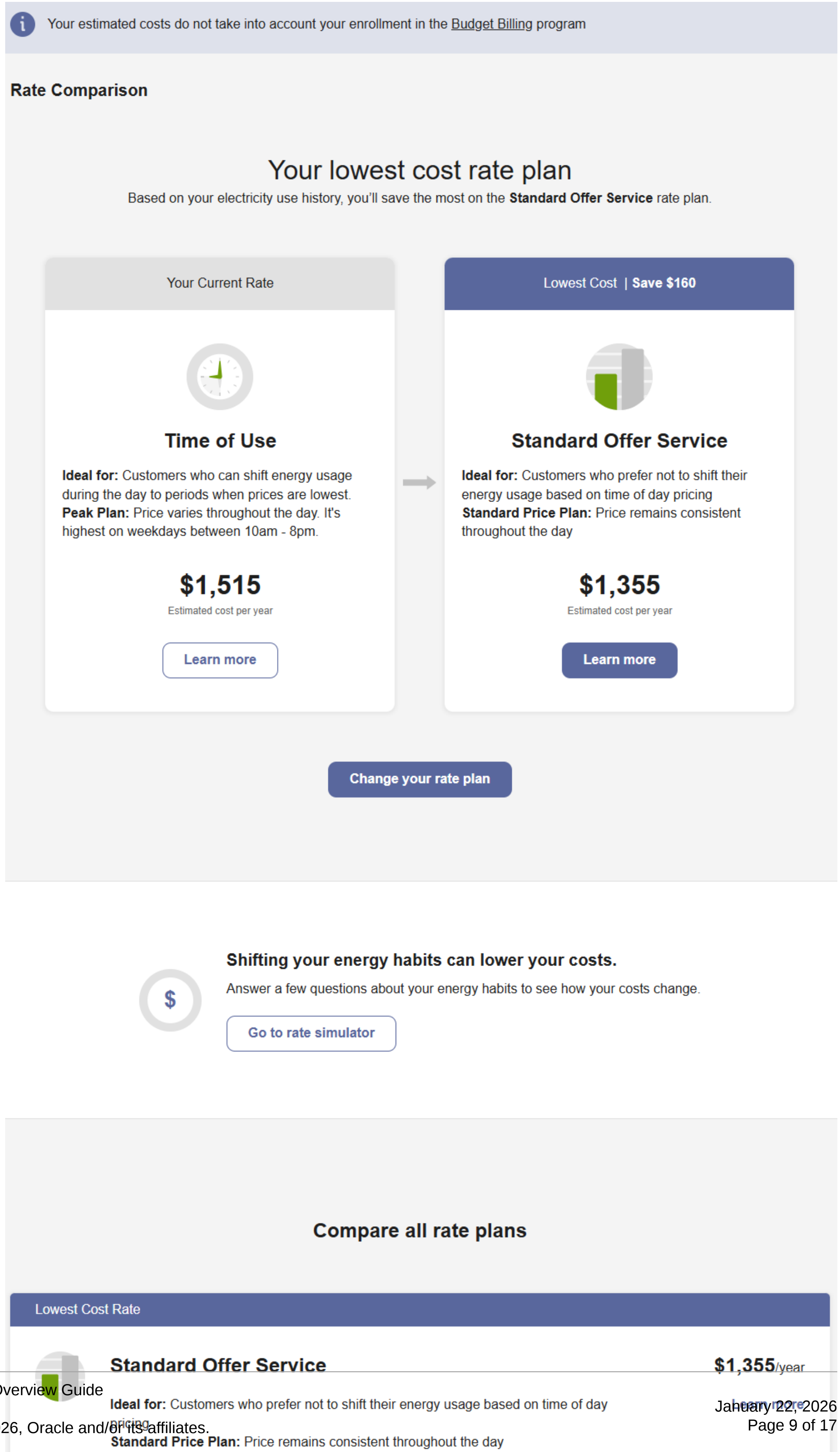
The following components are included in the Rate Comparison feature:

- Rate Comparison (Widget): Allows customers to see a comparison of their eligible rate plans.
- Rate Details: Allows customers to view additional information on each eligible rate plan.

- Rate Simulator: Allows customers to simulate how their energy costs may be reduced under other eligible rate plans if they make changes to their energy use habits.

Rate Comparison (Widget)

The Rate Comparison component allows customers to see a comparison of their eligible rate plans. This component compares the estimated annual costs for each rate plan and highlights the cheapest rate for the customer.


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
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

Lowest Cost Plan: Customers can compare their current rate plan to another rate plan they are eligible for. This comparison shows the customer at a glance which plan is their cheapest option. The name and key details of each plan are provided, along with a link to view additional details about a specific rate plan using the Rate Details component.

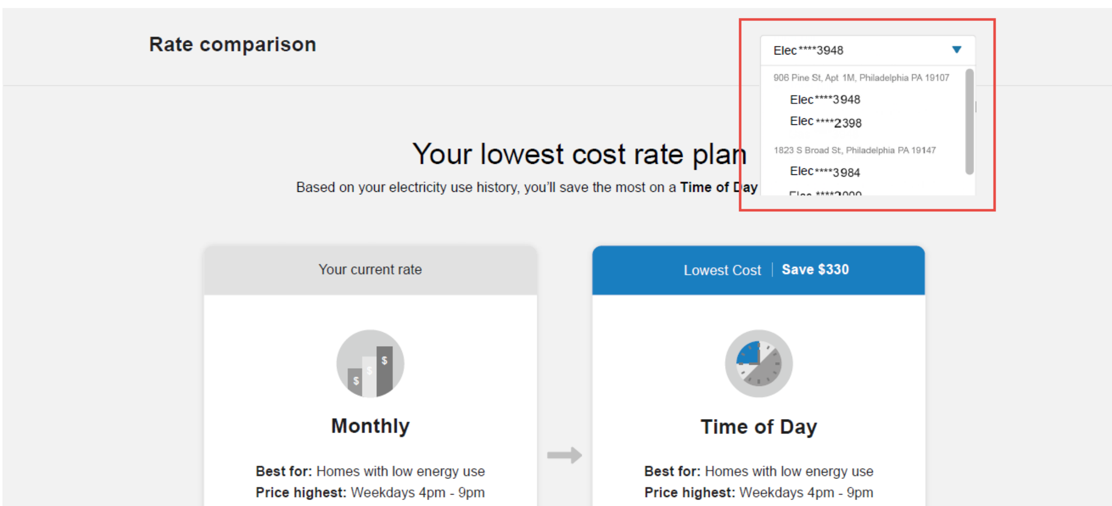
Change Your Rate Plan: A call-to-action for customers to change their rate is provided, which directs customers to a website location where they can change their rate plan. Alternatively, utilities can provide a phone number that their customers can call to change their rate plans.

Rate Costs Simulator Call-to-Action: A message is displayed to customers prompting them to see how changes in their energy use habits could lower their costs for varying rate plans. A link is provided that sends the customer to the Rate Simulator.

Compare All Rate Plans: All rate plans a customer is eligible for are displayed to the customer, which includes highlights of the rate plan, estimated annual cost, and a link that sends the customer to the rate details information. The rate plans are sorted to list the least expensive rate plan listed at the top and the most expensive rate plan at the bottom. A customer's current rate plan and lowest cost rate plan are also highlighted.

Legal disclaimers related to the information provided in the Rate Comparison can also be provided in a footer at the bottom of the page.

Multiple Premises and Service Points: If the customer has multiple premises and service points, then the customer can use a drop-down menu to view a rate comparison associated with each one. The drop-down menu lists each account premise, along with the service points associated with the premise. In this case, customers are able to select a service point, but not the premise itself.



Rate Details

The Rate Details component allows customers to view additional information on their eligible rate plans to better understand how a rate plan is structured and how their costs may vary throughout a year.

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

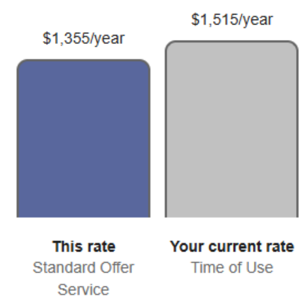
$1,355 /year

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**.



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**

Change your rate plan

Rate Plan Title and Estimated Costs: The rate plan title (for example, "Time of Day") and estimated annual costs for the rate plan are provided. Annual costs are rounded to the nearest $5.

Rate Plan Headline and Description: Descriptive information about the selected rate plan, which includes:

- A headline and general description that highlights how the plan works and why a customer would want to select the plan.
- A comparison between their current rate plan and the selected rate plan. The comparison includes bar graphs that display the costs of the rate plans for the customer.
- A link that directs the customer to a page where they can sign up for the rate plan.

Costs Per Bill: The Costs Per Bill table displays the per-bill costs, rounded to the nearest dollar, for each bill period within the last 12 months. Bill periods are always arranged in a January to December order. The current rate prices are used with historical usage data to calculate what a customer's costs would be if the current rate prices were applied to the last 12 months. The customer's current rate and the selected rate are included in the table. The highest and lowest bills for each rate plan are highlighted in the table. The insight headline above the table displays the amount of the highest bill for the selected rate plan.

> **Note**
>
> The annual totals in the Costs Per Bill table are not expected to match the exact annual total costs in all cases. This is due to the Costs Per Bill table rounding to the nearest $1, while annual costs are rounded to the nearest $5.

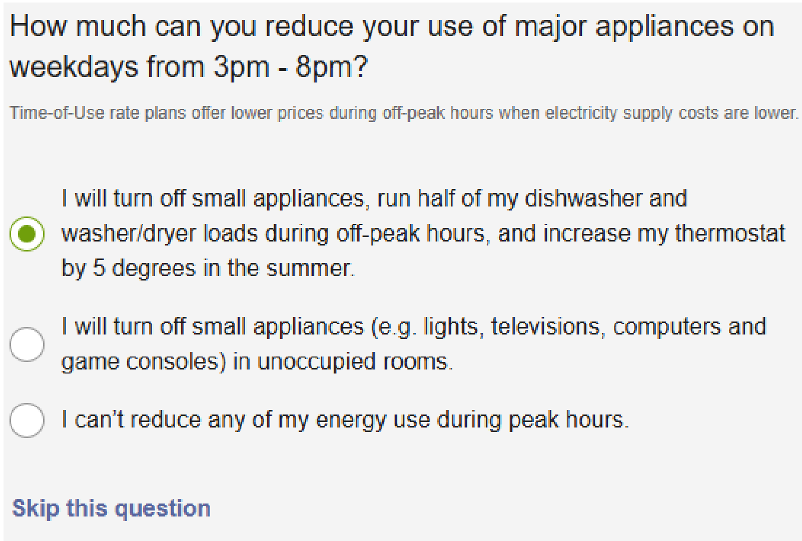
- **Change Your Rate Plan**: A call-to-action for customers to change their rate is provided, which directs customers to a utility website location where they can change their rate plan. Alternatively, utilities can provide a phone number that their customers can call to change their rate plans.
- **Additional Rate Content**: Utilities can provide content for each available rate, including content such as FAQs, key details, rate structure explanations, and so on.

Legal disclaimers related to the information provided in the Rate Details can also be provided in a footer at the bottom of the page.

Rate Simulator

The Rate Simulator prompts customers to answer a few short questions about how they might change their energy use. Based on the customer's responses, their energy use data is updated, reducing or shifting a certain percentage of their applicable energy use. As a result, customers can be shown whether other rate plans might provide reduced costs if they make changes to their energy habits.

Rate Simulator Questions: The standard questions are related to shifting energy use to avoid peak times, reducing energy use during peak events, and reducing overall energy use. Answering the first question is required. Most of the other questions can be skipped if necessary. The image below is an example of one of the standard questions.



Depending on the utility's setup and configuration, the rate simulator may also include a question about whether the customer plans to purchase an electric vehicle (EV). This allows the energy usage for charging the EV to be simulated. The customer can enter a number of miles per week which they anticipate driving. Data validation is used to prevent customers from entering zero or an unrealistic number exceeding a maximum threshold.

Impact of Customer Responses: Customer responses are used to inform the results of the Rate Comparison widget. The lowest cost rate plan is highlighted at the top of the summary, and includes a reference to the customer's responses to the rate simulator survey. All the rate plans for which a customer is eligible are also displayed. Each rate plan includes the new estimated cost, along with the cost prior to completing the survey. Furthermore, the order of rate plans in the **Compare all rate plans section** is updated to list the least expensive rate plan at the top and the most expensive rate plan at the bottom.

Customers who select **Learn More** and navigate to the Rate Details widget are presented with the new estimated cost for the rate plan, along with the cost prior to completing the survey. This includes updating the insight message that compares the customer's current rate plan to reflect the new difference between a customer's current rate plan and the selected rate plan.

Updating Survey Responses: Customers can modify their responses at any time by using the links to update their answers or completely reset the simulator.

Rate Education Reports - Print

Print Rate Education Reports are paper communications that inform customers of rate changes, encourage customers to opt in to a new rate, or provide other information specific to rates.

Customer Experience

Print Rate Education Reports are two pages of content that consist of modules. When printed out, the reports are a single sheet of paper, with content on the front and back.

Report Header

The header appears in the top section of the front of every Rate Education Report. The purpose of the header is to provide customer information and to introduce the report. The header contains the customer address box, utility return address box with utility logo, customer account information, and introductory paragraph that explains the purpose of the report. The mailing and return addresses are placed so as to show through the two windows in the envelope. The right side of the header contains introductory information and a call to action. An additional message and small illustration may appear below this content.

Report Modules

Rate Education Reports contain modules that include the following types of information:

- **Rate Analysis Information**: A customer-specific analysis of projected savings by opting in to a new rate plan. For example, the projected annual or monthly cost for the current rate as compared to the projected annual or monthly cost for the new rate.
- **Rate Plan Details**: Information about the new rate plan such as the season start and end dates, peak hours, and the number of days during the season affected by the rate plan.
- **Custom Tips**: Custom tips can be added to provide information about how customers can save energy on a new rate plan. For example, customers may be able to reduce their energy use during peak hours to receive lower cost energy bills under a new rate plan.

Additional custom modules may be available. Contact Your Delivery Team to discuss your options.

Report Footer

The footer appears at the bottom of the back page of the report. The footer includes optional legal text, utility customer service contact information, utility logo, and Oracle Utilities copyright information.

Data Requirements and Limitations

Channel Fees

Utilities may purchase a channel fee if they are using any printed rate education communications as part of the Oracle Utilities Opower program. Channels fees are used to add on report generation, printing, mailing, and postage services to a cloud service. There are two types of options: General Availability and Controlled Availability channel fees. The type that is relevant depends on the individual Oracle Utilities Opower program setup. Coordinate with your sales representative if you need help determining which type applies.

A summary of the fees is shown below. For more details about what each channel fee includes and the requirements for using them, see the Oracle Utilities Opower Channel Fees Cloud Services guide.

General Availability Channel Fees

The General Availability channel fees are applicable if the utility has a version of the cloud service that includes report generation. These channel fees can be purchased for different regions.

- **Report Printing and Mailing**: The Report Printing and Mailing channel fee includes the printing of generated report communications through an approved third-party print vendor, as well as services for the proper mailing of the reports. It does not include postage for mailing the reports to customers.
- **Postage for Print and Mail**: The Postage for Print and Mail channel fee includes postage for the delivery of print communications.

Note: The postage channel fee cannot be purchased alone. It must be purchased in combination with the printing and mailing channel.

Controlled Availability

The Controlled Availability channel fees are applicable if the utility has a version of the cloud service that does not include report generation. A utility may only choose one of the channel fees listed below.

- *Report Generation*: The Report Generation channel fee includes generating a digital version of print communications. It does not include the printing and mailing of print communications.
- *Report Generation and Print*: The Report Generation and Print channel fee includes the generation and printing of print communications. It does not include the mailing of print communications.
- *Report Generation, Print, and Mail*: The Report Generation, Print and Mail channel fee includes the generation, printing, and mailing of print communications.

Utility Requirements

- **Languages**: Not all languages and locales are supported at this time. Contact your Oracle Utilities Sales Representative to confirm that Rate Education Reports are available in your market.
- **Report Limit**: Up to two Rate Education Reports are included in the 12 month contract period in the Rates Engagement cloud service.
- **Customer Service Limitation**: Rate Education Reports are not currently available for Customer Service Representatives (CSRs) to view in the Customer Service Interface (CSI).

Customer Requirements

- **Historical Billing Data**: The customer must have 12 months of historical billing data.
- **Billing Data**: Customer billing data must date back to the beginning of the current billing cycle.

Rate Education Reports - Email

Email Rate Education Reports are digital communications that inform customers of rate changes, encourage customers to opt in to a new rate, or provide other information specific to rates.

Customer Experience

Email Rate Education Reports consist of modules containing actionable information about customers' energy rates. 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.

Subject Line

The subject line is used to engage the customer and brand the communication. The subject line varies based on the content of the Rate Education Report and is determined by Oracle Utilities and the utility.

Email Header

The email header contains a logo provided by the utility and the customer's utility account number. Part of the account number is obscured for security purposes.

Email Modules

Rate Education Reports contain modules that provide the following types of information:

- **Rate Analysis Information**: A customer-specific analysis of projected savings by opting in to a new rate plan. For example, the projected annual or monthly cost for the current rate as compared to the projected annual or monthly cost for the new rate.
- **Rate Plan Details**: Information about the new rate plan such as the season start and end dates, peak hours, and the number of days during the season affected by the rate plan.
- **Custom Tips**: Custom tips can be added to provide information about how customers can save energy on a new rate plan. For example, customers may be able to reduce their energy use during peak hours to receive lower cost energy bills under a new rate plan.

Additional custom modules may be available. Contact Your Delivery Team to discuss your options.

Email Footer

The email footer contains the following content:

Unsubscribe: A link to a page where customers can unsubscribe from email Rate Education Reports. An unsubscribe link must appear due to CAN-SPAM regulations in the US and similar regulations abroad. The URL the unsubscribe link points to cannot be customized.

Warning: Unsubscribing from Rate Education Reports in this manner unsubscribes the customer from all Oracle Utilities Opower email communications. This action is permanent. A customer cannot opt in again after opting out.

Address: The utility's mailing address. The mailing address must appear due to CAN-SPAM regulations in the US and similar regulations abroad.

Disclaimer: An optional disclaimer that can be added at the request of the utility.

Legal text: The copyright and any other legal text required by the utility or Oracle Utilities.

Data Requirements and Limitations

Utility Requirements

- **Languages**: Not all languages and locales are supported at this time. Contact your Oracle Utilities Sales Representative to confirm that Rate Education Reports are available in your market.
- **Report Limit**: Up to two Rate Education Reports are included in the 12 month contract period in the Rates Engagement cloud service.
- **Supported Email Clients**: Oracle Utilities supports email clients that may be native to a specific device, such as the installed email client on the iPhone, as well as email client applications that may be accessed from any device or computer, such as Gmail.com. Oracle Utilities supports the following email clients to view email Rate Education Reports:

- iPhone internal email client
- iPad internal email client
- Apple Mail
- Android internal email client
- Microsoft Outlook
- Outlook.com
- Yahoo! Mail
- Gmail.com

For email clients that support multiple versions operating at the same time (for example, Apple iOS6 on iPhone or Microsoft Outlook 2010, 2012, and 2013), Oracle Utilities generally supports the most current major release as well as a number of previous major releases. For email clients that only provide a single version (for example, Gmail.com), Oracle Utilities supports the currently available version. Other email clients are not officially supported or tested by Oracle Utilities. Customers viewing email Rate Education Reports on unsupported devices or applications may see user experience variations in their reports.

- **Customer Service Limitation**: Rate Education Reports are not currently available for Customer Service Representatives (CSRs) to view in the Customer Service Interface (CSI).

Customer Requirements

- **Historical Billing Data**: The customer must have 12 months of historical billing data.
- **Billing Data**: Customer billing data must date back to the beginning of the current billing cycle.
- **Customer Email Address**: The customer must have a current email address.

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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.