

ORACLE

Oracle Energy and Water
Customer Edge
Conference

Customer Solutions

Product Update and Roadmap

Oracle Energy and Water

13 March 2023



Thank you to our track sponsors!

Platinum Sponsor:



Silver Sponsors:



Bring your BIG IDEAS to the Oracle Ignite Series

Seaport Ballroom, Tuesday 14 March 2:10 – 5:00pm

Hear the pitch

Join a team

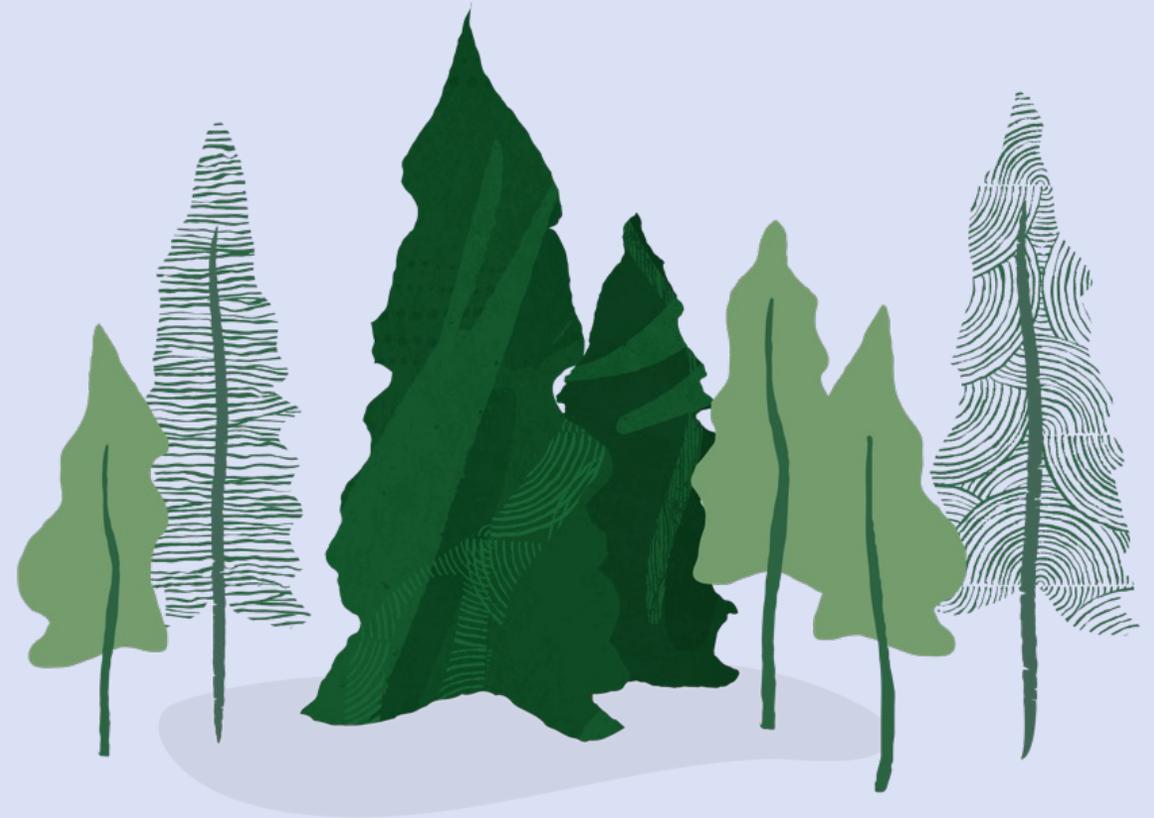
Build a solution

Select the
winner!

Customer Edge 2023 Grand Finale:
Oracle Ignite Pitch Competition
Seaport Ballroom 4:10 – 5:00

Customer Transformation Track

Play Edge Quiz Game to help us donate more trees!



Hello, meet the Oracle team



Dan Madigan

Product
Management
Senior Director



Brenda Craig

Global Customer
Solutions Product
Marketing Director



Hung Nguyen

Product
Management
Director

Safe harbor statement

The following is intended to outline our general product direction. It is intended for information purposes only, and may not be incorporated into any contract. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, timing, and pricing of any features or functionality described for Oracle's products may change and remains at the sole discretion of Oracle Corporation.

Industry Trends

Industry

- Electrification expansion
- Sustainability
- Renewable Energy
- Regulatory Pressure
- New Players
- New Products



Customers

- Personalization
- Choice/Expectations
- Digital twins
- Bundles
- E-Mobility
- Communities



Employees

- Workforce role transition
- Customer focused
- Digitization
- Automation



Technology

- Cybersecurity
- Cloud/SaaS
- AI/ML
- Low code tools



What are your top challenges in 2023?

- 1. Increased Customer Expectations**
- 2. Upskilling your team**
- 3. Simplifying the IT/application landscape**
- 4. New technology to solve security breaches**
- 5. Lowering operational costs**

Customer Highlights

Oracle Energy and Water

Growing customer base

>250

live customers

Global

48

countries

Expansion in production

105M

meters in production

SaaS milestones

25

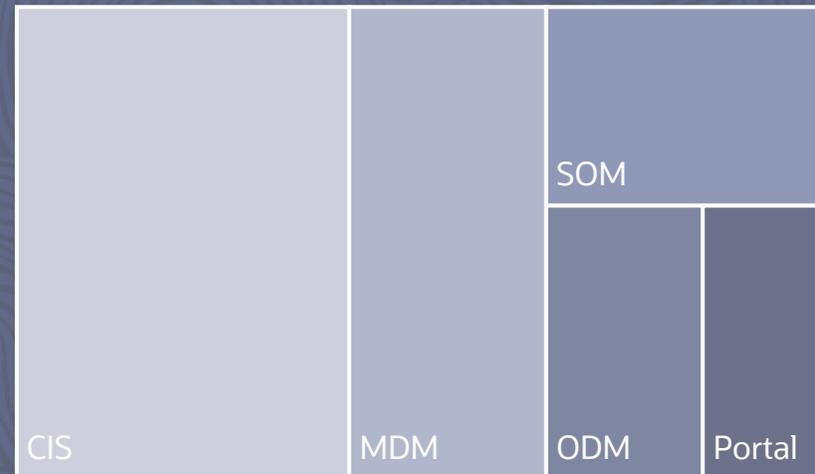
customers

Customer Feedback

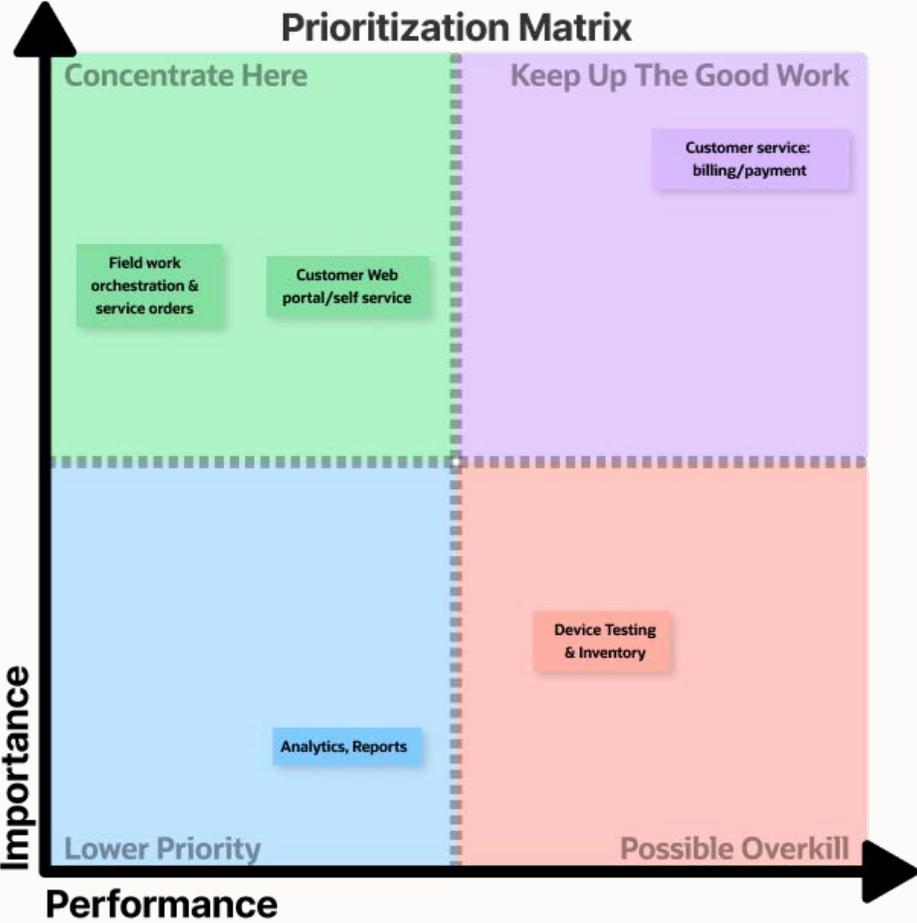


Customer Survey Goals

1. Determine areas that are most important to our customers and their users
2. Determine the areas which best/least serve our customers and their users
3. Identify top areas of investment that our important to our customers and their users.



Customer Survey Importance vs Performance



Respondents overwhelmingly agree that the most important part of our product suite is “Customer service, billing & payments “ (CC&B).



“The life blood of C2M is being able to bill and provide service, that’s the #1 use case for selecting Oracle.”

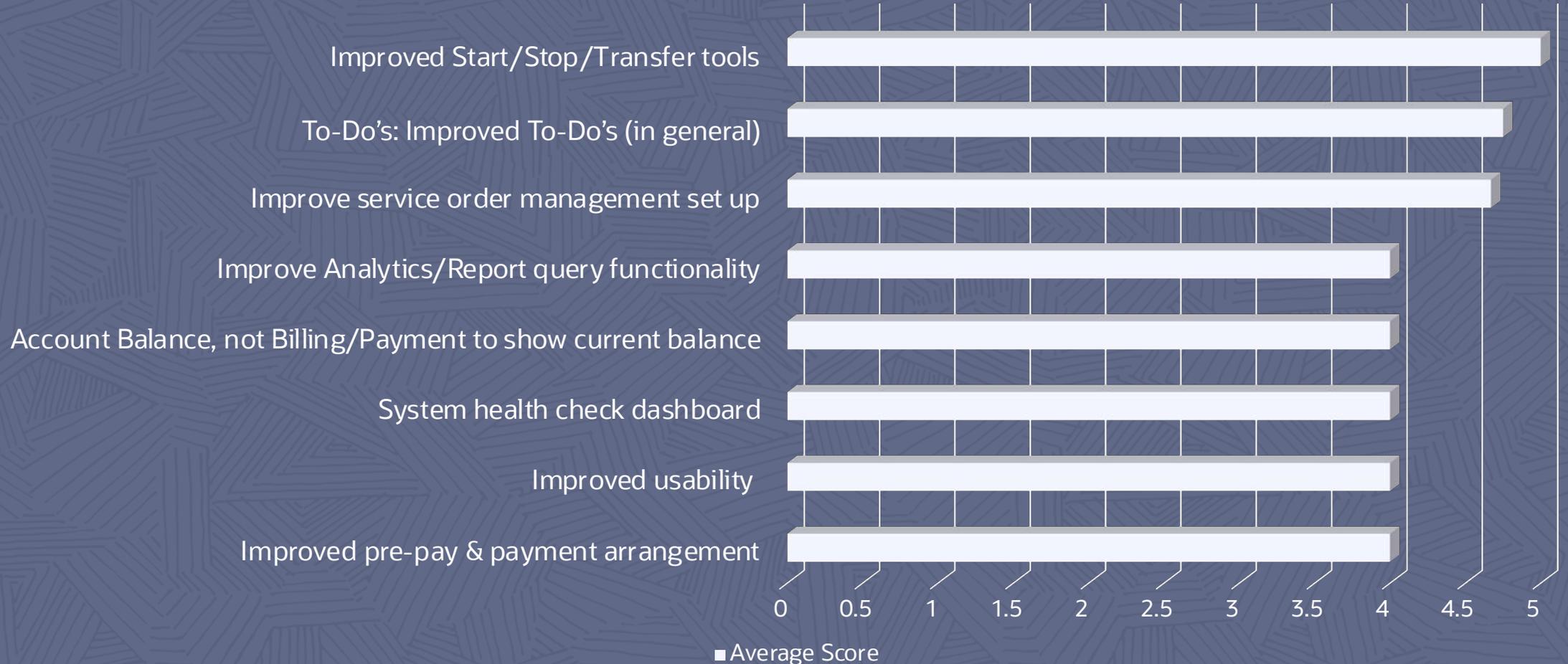
“The training that we need to do with our call center folks has become more complex ... if there was a way that we could make control central easier for them”

“Continue to improve on consistency between the modules ... CC&B and other Oracle working together as one platform”

“An easy path to move to SaaS is big for us. It’s not sustainable for us to maintain such a big on-prem environment, especially as cybersecurity regulations come down, and we have to patch and maintain.”

Most Desired Improvements

In the survey, we asked what improvement they would like to see. Which of these would be most desirable or most important to your organization? (Average scores shown)



Oracle Energy & Water Customer Investments



Customer Solution Roadmap Investment Focus Areas



Meter to Cash Efficiency

Automate critical back-office processes. Streamline billing and metering operations



Enterprise SaaS

Lowering cost of moving CC&B to C2M, Simplify self-service configuration



Integrated Utility Platform

Lower TCO with productized integrations across products



Customer Experience

Improving the Agent and Account Manager experience, Frictionless self-service



We're reimaging the utility customer platform

Connected Experiences & Experience Orchestration

Product Launch

Campaigns

Commerce

Account Management

Self Service

Agent Service

Field Service

Operational Configuration

Marketing

Sales

Service

Engagement

Meter to Cash

Billing

Credit & Collections

Rating

Metering

Payments

Service Orders

Data 360

Data Intelligence & Analytics
Product Data – Customer Data – Utilities Data Model

CX Industry Framework

Adaptive Data Mastering – API Orchestration

Oracle Cloud Infrastructure



Customer Cloud Service

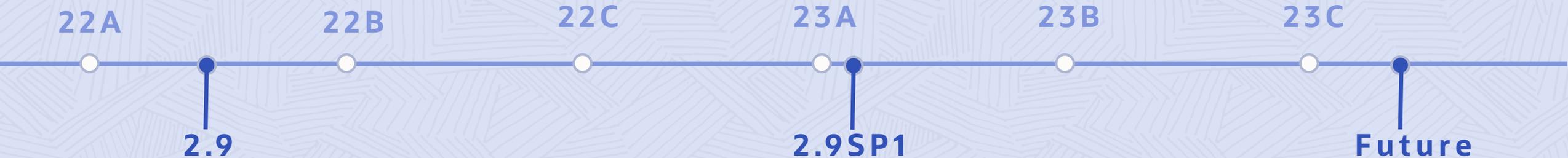


Key Roadmap Focus Areas at a Glance



Release Strategy

SaaS



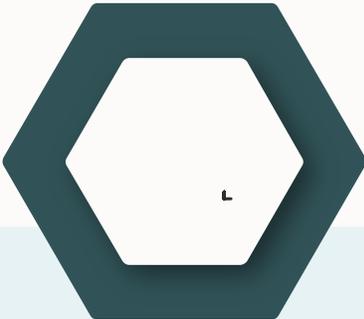
On Premise



What are your upgrade plans?

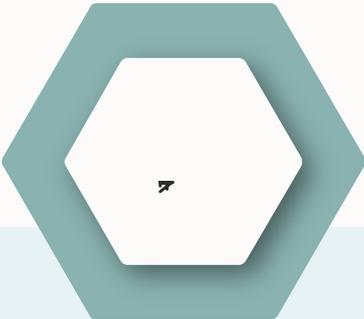
- 1. Recently completed an upgrade**
- 2. Upgrade in process**
- 3. Moving to CCS**
- 4. No plans to upgrade**

Customer Cloud Service Roadmap – Focus Areas



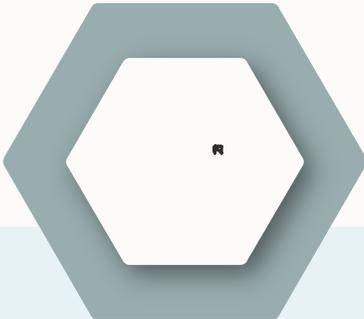
Enhanced Customer Care & Billing Productivity

- Start/Stop Improvements
- To Do prioritization and assignment
- Customer 360 Usability Improvements



Streamline Metering & Service Management

- Filter service agreements to process for starting and stopping service
- Enhanced metering capabilities
- Streamlined access to additional service order management records



Enterprise SaaS

- Service Reliability Increase
- Status Page
- Auto-Scaling
- Support for Customizations in SaaS
- Tools to improve upgrade testing

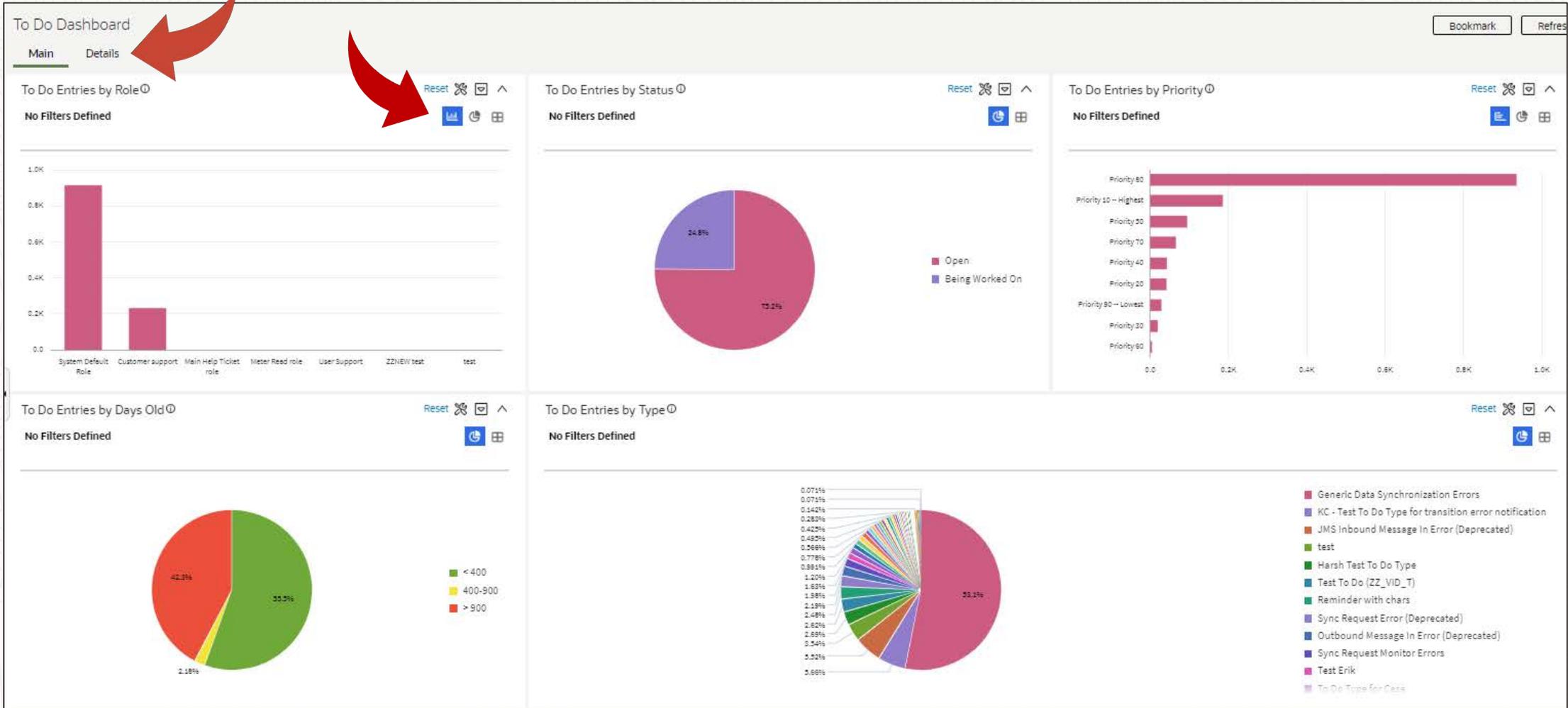


Integrated Utility Platform

- REST APIS
- Work and Asset Management Service Calls
- Digital Asset Cloud Service



Customer Cloud Service - To Do Dashboard



Customer Cloud Service - To Do Dashboard

To Do Dashboard

Bookmark Refresh

Main **Details**

To Do Details



Filters: To Do Type Business Flag Sync Errors (F1-BSFLS) , Priority Priority 10 -- Highest (010)

Update Assign Unassign Complete

<input type="checkbox"/>	Action	Priority	Days Old	To Do Type	Status	Assign to User	Message
<input type="checkbox"/>	Work	Priority 10 -- Highest	309	Business Flag Sync Errors	Open		Deleted To Do Types and Excluded To Do Types are mutually exclusive. Please prov
<input type="checkbox"/>	Work	Priority 10 -- Highest	520	Business Flag Sync Errors	Open		Deleted To Do Types and Excluded To Do Types are mutually exclusive. Please prov
<input type="checkbox"/>	Work	Priority 10 -- Highest	520	Business Flag Sync Errors	Open		Deleted To Do Types and Excluded To Do Types are mutually exclusive. Please prov
<input type="checkbox"/>	Work	Priority 10 -- Highest	2350	Business Flag Sync Errors	Open		Business Flag Type not found for Standard Name.



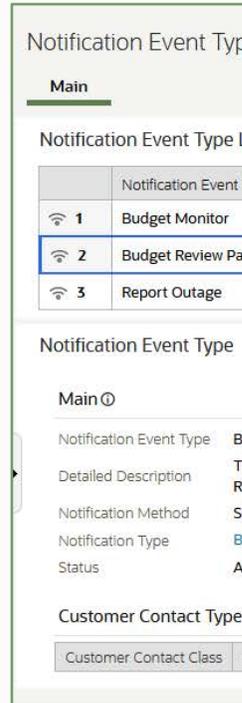
Omni-channel Notifications

Notification Event Type

- Defines omni-channel notifications to be sent when a specific event type occurs

Notification Details

- Additional details available for digital channels



Notification Event Type

Main

Notification Event Type	Notification Event Type Label
1	Budget Monitor
2	Budget Review Pa
3	Report Outage

Notification Event Type

Main

Notification Event Type: B
Detailed Description: R
Notification Method: S
Notification Type: B
Status: A

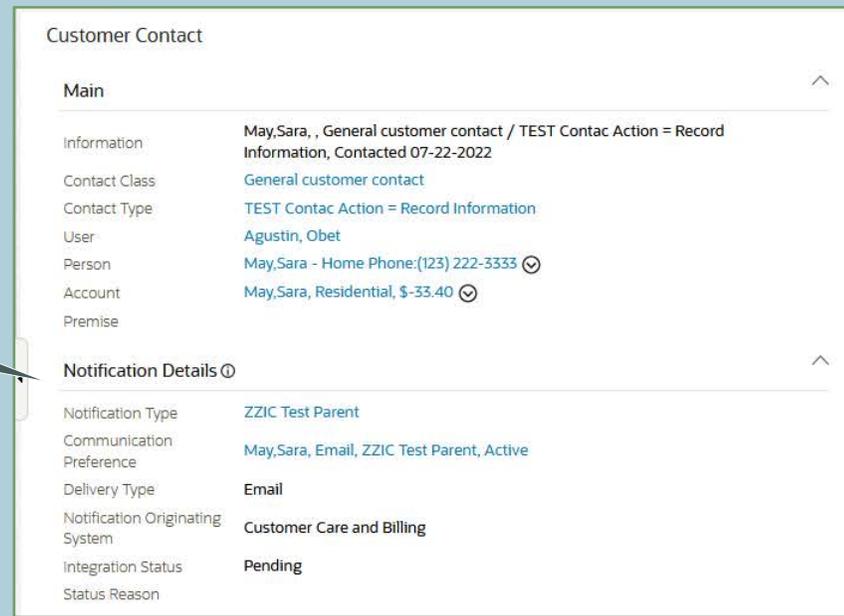
Customer Contact Type

Customer Contact Class: C

Notification Method defines how the notification is to be sent:

- Letter, Digital, Digital Preferred, Both Digital and Letter

Additional details about digital notifications including delivery status*



Customer Contact

Main

Information: May,Sara, , General customer contact / TEST Contac Action = Record Information, Contacted 07-22-2022

Contact Class: General customer contact

Contact Type: TEST Contac Action = Record Information

User: Agustin, Obet

Person: May,Sara - Home Phone:(123) 222-3333

Account: May,Sara, Residential, \$-33.40

Premise:

Notification Details

Notification Type: ZZIC Test Parent

Communication Preference: May,Sara, Email, ZZIC Test Parent, Active

Delivery Type: Email

Notification Originating System: Customer Care and Billing

Integration Status: Pending

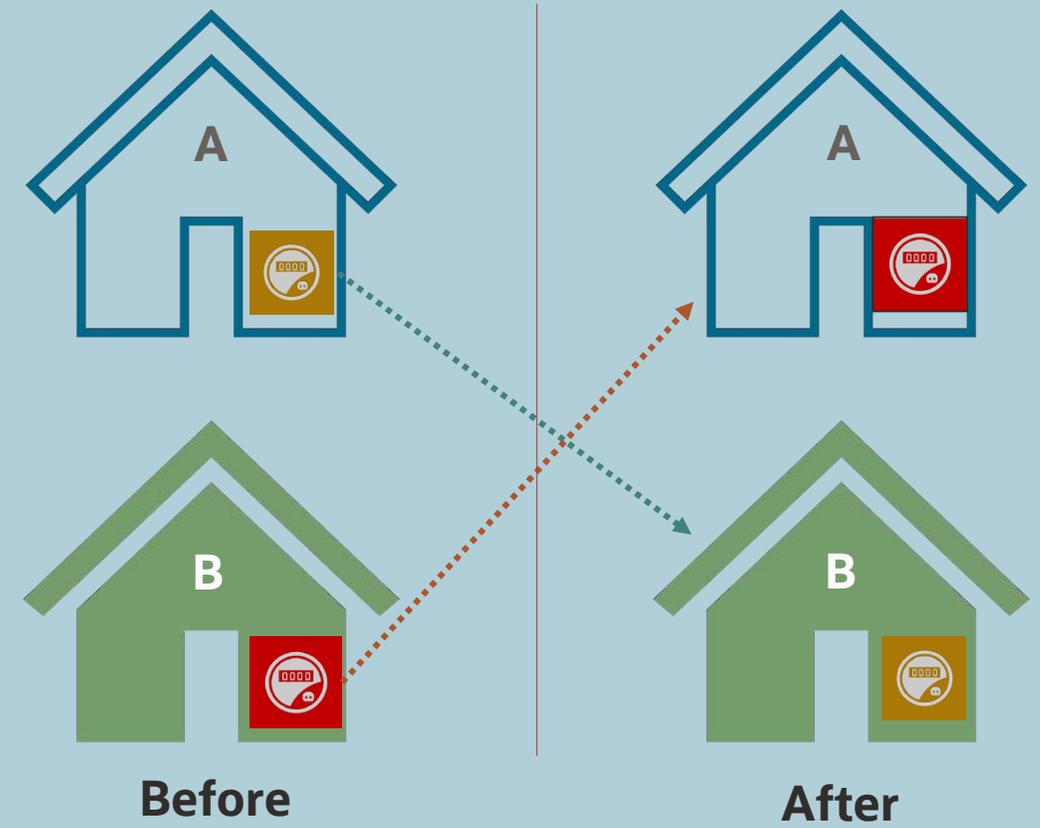
Status Reason:

*notification system must provide status updates



Streamlined Process for Correcting Cross Installed Meters

- Guided process flow minimizes errors
- Automation reduces manual work
- Flexible bill correction/adjustment options for improved customer satisfaction



Streamlined Process for Correcting Cross Installed Meters

Process Flow: Cross Installed Meter Bookmark Refresh

Main Log

Process Flow

Cross Installed Meters

Meter 1	Meter 2	Insights
<p>🏠 100 Market Street, Apt 12, San Francisco, CA, 94111 / Electric Residential / Electric / ER-1000031 / Read Cycle 02, Route 200 / Active</p> <p>📄 ER-1000031 / Electric Manual Read Meter - Digital / Install Date/Time: 02-15-2017 0:00:00 PST / On / Active</p> <p>🕒 Electric Manual Read Meter - Digital / Effective Date/Time:02-01-2017 0:00:00 PST / Electric Manual Read - kWh - Scalar / 1 Measuring Component(s) / Active</p>	<p>🏠 100 Market Street, Apt 11, San Francisco, CA, 94114 / Electric Residential / Electric / ER-1000032 / Read Cycle 02, Route 200 / Active</p> <p>📄 ER-1000032 / Electric Manual Read Meter - Digital / Install Date/Time: 01-22-2017 0:00:00 PST / Off / Active</p> <p>🕒 Electric Manual Read Meter - Digital / Effective Date/Time:01-01-2017 0:00:00 PST / Electric Manual Read - kWh - Scalar / 1 Measuring Component(s) / Active</p>	<ul style="list-style-type: none">📘 Service Points share the same Installation Constant (1.000000).⚠️ Meters were installed -24 days apart from each other.📘 Meters share the same device category (Manual).📘 Service Points share the same measurement cycle (CYCLE02).

Optionally initiate field work requests Investigate Investigate

Swap Meters Initiate logical exchange of meters at service points

Cross Installed Meter Identification

Meter Source Meter 1 Meter 2

Address

City

Postal

Badge Number

Search

Next Save Cancel Process

Streamlined Process for Correcting Cross Installed Meters

Process Flow: Cross Installed Meter
Bookmark Refresh

Main Log
Process Flow ☑ ^

Process Flow: Cross Installed Meter
Bookmark Refresh

Main Log
Process Flow ☑ ^

```

graph LR
    1((1)) --> 2((2))
    2 --> 3((3))
    style 3 stroke:#f90,stroke-width:2px
            
```

Summary

Corrected Meter Installation

Meter 1 Installation	Meter 2 Installation
🏠 100 Market Street, Apt 12, San Francisco, CA, 94111 / Electric Residential / Electric / ER-1000031 / Read Cycle 02, Route 200 / Active 📄 ER-1000032 / Electric Manual Read Meter - Digital / Install Date/Time: 01-22-2017 0:00:00 PST / Off / Active ⚙️ Electric Manual Read Meter - Digital / Effective Date/Time:01-01-2017 0:00:00 PST / Electric Manual Read - kWh - Scalar / 1 Measuring Component(s) / Active	🏠 100 Market Street, Apt 11, San Francisco, CA, 94114 / Electric Residential / Electric / ER-1000032 / I 📄 ER-1000031 / Electric Manual Read Meter - Digital / Install Date/Time: 02-15-2017 0:00:00 PST , ⚙️ Electric Manual Read Meter - Digital / Effective Date/Time:02-01-2017 0:00:00 PST / Electric M

Corrected Bill Segment Information

Meter 1 Bill Segments	Meter 2 Bill Segments
Watson,Peter / Electric Residential / 1 Bill Segments / Canceled / 07-31-2022 19:36:57	Walker,Peter / Electric Residential / 5 Bill Segments / Canceled / 07-31-2022 19:37:01

Customer Contacts

Meter 1 Customer Contacts	Meter 2 Customer Contacts

Previous **Next**
Previous **Finish** Save Cancel Process

Correct Bill Segments

Watson,Peter / Electric Residential

Walker,Peter / Electric Residential

Bill Segment Id

California / Electric Residential, F

Previous Next

Customer Cloud Service - Start/Stop Appointment Scheduling

- Efficiently Schedule Field Work Appointments
- Select timeslot and automatically schedule in Field Service system
- Available appointment slots as returned by the field work system

Process Flow: Start Service Request Process +

Main Log

Process Flow

☑ You are viewing a closed process.

1 Move-to Premise Address 2 Customer Identification 3 Services to Start 4 Person and Account Details 5 Review and Submit

Move-to Premise Address
200 Johnson Springview, Rocklin, CA, 95765

Service Status
⚠ Electric Residential, Service Off, No Device

Person
Showman, Richard

Account
Residential, 2318622812

Warning
1 Field activity requires appointment.

Schedule

New Insight.

Starting Service.

Start Date

Service: Elect

Person and Account Details

Main Customer

Detailed View

Navigates user to new Account Appointment portal.

Account Appointment

Main

Account Activities ☯

Filters: Account ID 2318622812

	Action	Activity Type	Activity	Appointment Start Date/Time	Appointment End Date/Time	Passthrough	Appointment Option	Service Point
1	Request Slot	Field Activity	Field Activity / Install Meter / Customer to Meter / 1506579787 / Waiting for Appointment / Create Date Time: 11-14-2022 17:14:47			No	Not Applicable	200 Johnson Springview, Rocklin, CA, 95765, USA
2		Enable Service	Enable Service Type / 200 Johnson Springview, Rocklin, CA, 95765, USA / 11-14-2022 17:14:46 / 11-14-2022 0:00:00 PST // Activity in Progress					200 Johnson Springview, Rocklin, CA, 95765, USA

Account Activities zone displays activities related to an account.

Displays available appointment slots.

Show Inactive Activities
Show Activity
Update/Cancel History

Search

Unified Search

Improving the Usability of Search

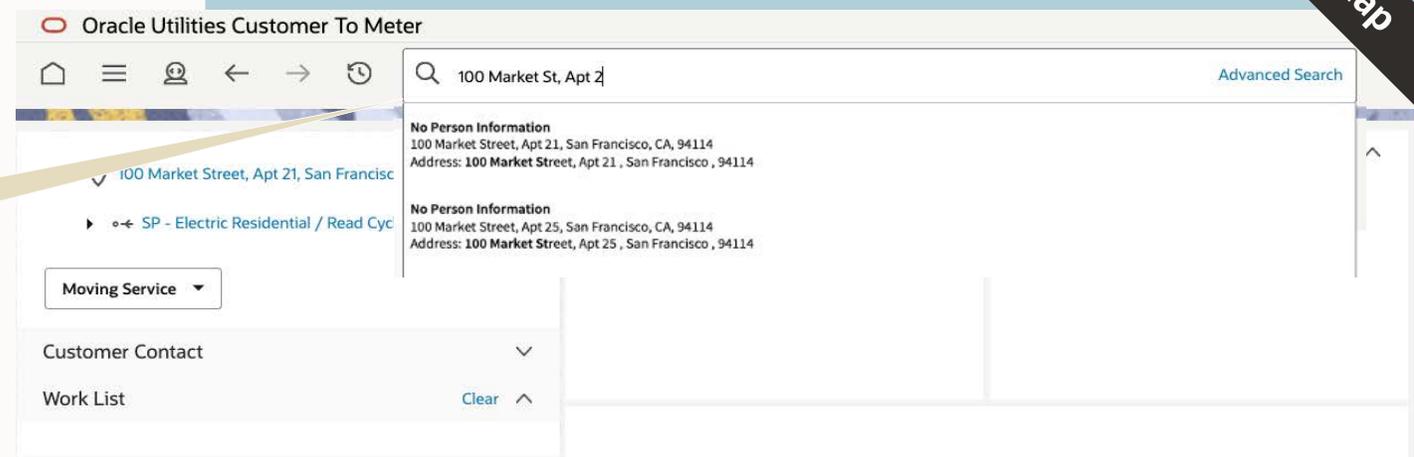
The screenshot shows the Oracle Utilities Customer To Meter search interface. The search bar contains the text "Search Assistant" and "Advanced Search". Below the search bar, there are four callout boxes pointing to specific features:

- Active search details:** Points to the "Customer Meter Search" section, which includes instructions: "Search for customer or meter by name, account ID, ID number, contact information (phone or email), address, badge number or serial number. Click the Advanced Search to navigate to the Customer 360 Search portal."
- Other searches available:** Points to the "Other Searches" section, which contains four buttons: "Meter Search", "Asset Search", "Customer Search", and "Asset Location Search".
- Recent session searches:** Points to the "Recent Searches" section, which shows a list of recent searches, including "n:Brazil".
- Active search hints:** Points to the "Hints" section, which lists various search criteria: "/ Search Menu", "bn: Badge Number", "sn: Serial Number", "n: Name", "ad: Address", "ac: Account ID", "id: ID Number", and "c: Contact Info".



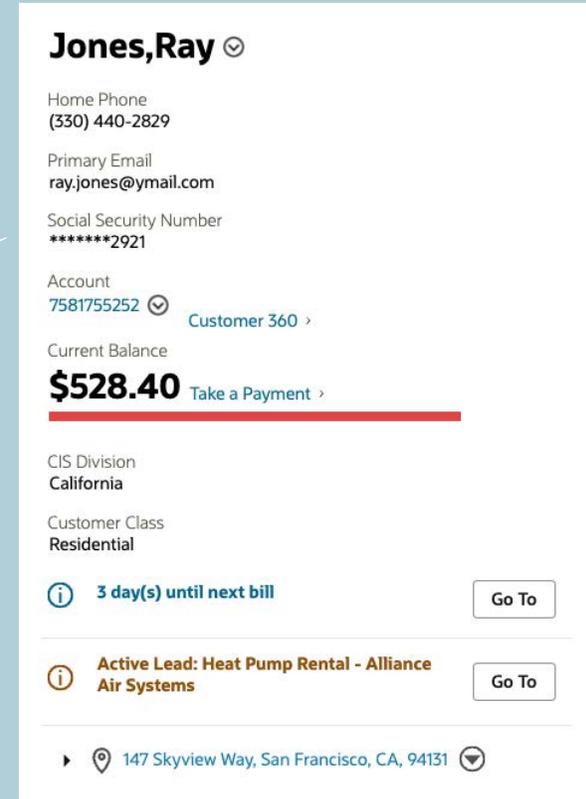
Customer Cloud Service - Search and User Experience

Improved search for multi-family properties



- Search improvements for multi-family properties across additional address line
- Configurable displays of person contact and person identifiers
- Prominent display of mailing address and address overrides

Dynamic display of other person identifiers



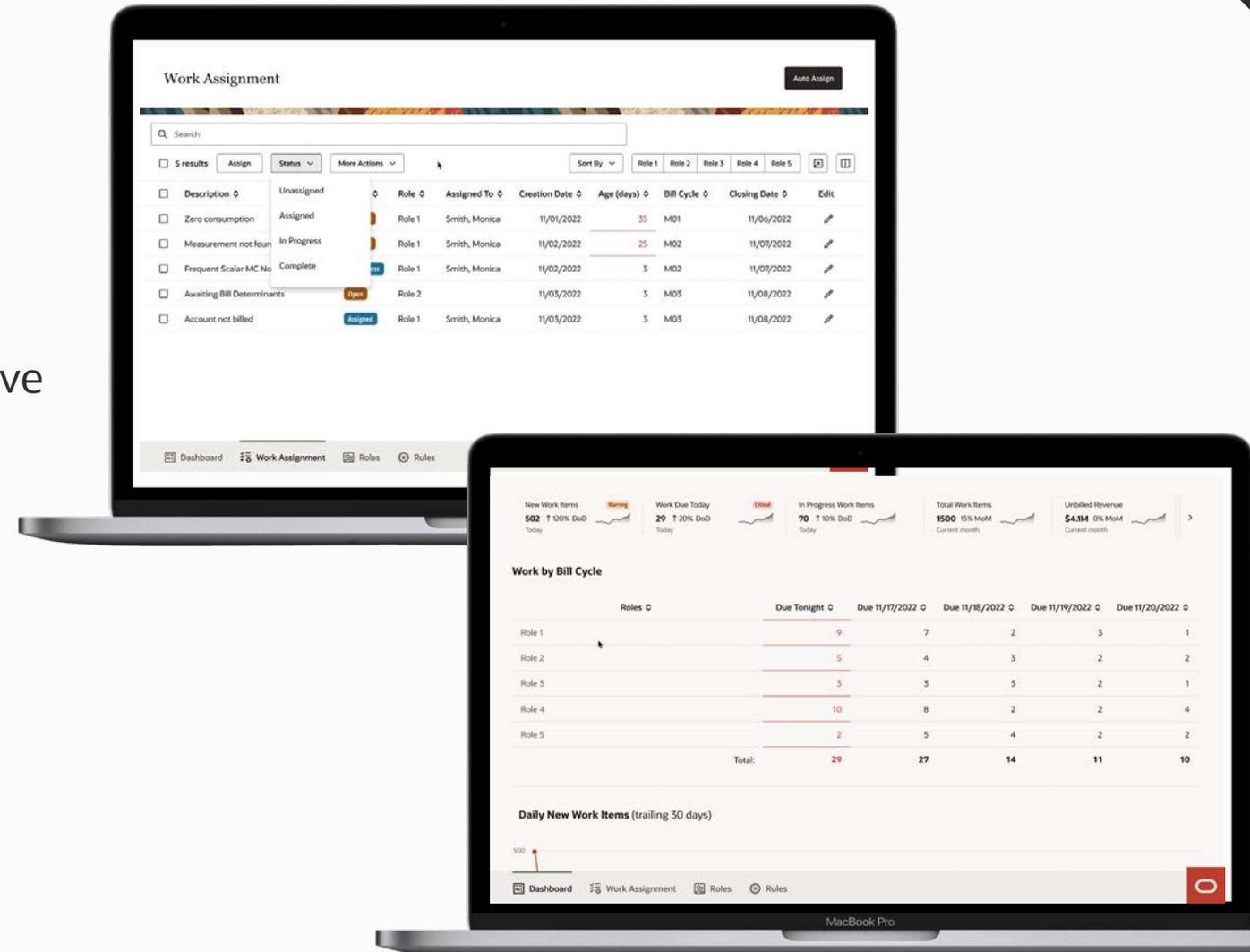
Customer Cloud Service – NextGen Work Management

Assignment Prioritization

- Save time with auto assignment
- Prioritizes the work the Billing Supervisor should take action on
- Allows a user to set work availability to drive auto assignment

Improve UX

- Improved Search and Filtering
- Simplified layout designed for the Billing Supervisor



We Are Listening to You—One Time Payments Now Simplified



Fred

Meet Fred—he is an engineer with a large IT company

He likes simple quick user experiences

He is enrolled in autopay but with a maximum withdrawal amount on his account for budgetary purposes

He reviews all of his bills monthly and likes to ensure that all balances are paid if possible



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Oracle Utilities Customer To Meter

Advanced Search

Current Context

- Egle, Fred - Home Phone:(415) 739-0128
- 6958394581 6 Egle, Fred, Residential, \$80.95
- 100 Switch Back Road, Apt. 106, Fremont, CA, 94516

Egle, Fred

Home Phone (415) 739-0128

Primary Email egle.fred@gmail.com

Social Security Number *****0183

Account 6958394581 Customer 360

Current Balance **\$80.95** Take a Payment

CIS Division California

Customer Class Residential

Switch Language

Switch To [Dropdown]

Refresh

Alerts

Last Contact: 2,203 days ago - Murray, Lynette

Auto-Pay Active

Landlord Exists

Bookmarks

Program Enrollment

- Customer is on auto pay Auto pay active on 01-01-2017 Go To
- Customer is not on e-bill Enroll
- Customer does not have a web account Instruct customer to enroll at utilityco.com

Customer Insights

- Landlord Exists Go To

Usage and Billing Financial History Payment Agreement Credit & Collection

Cost / Usage Time Scale Start Date End Date

Year View

03-01-2016 04-01-2017

Month	Electric (USD)	Ending Balance (USD)
Mar 1 2016		
Apr 1		
May 1		
Jun 1		
Jul 1		
Aug 1		
Sep 1		
Oct 1		
Nov 1		
Dec 1		
Jan 1 2017		
Feb 1	~\$78	\$0
Mar 1	~\$76	\$78
Apr 1	~\$78	\$0

Customer Activity History

Filter By

April 2017

- April 12 Payment received for \$78.58 Paid by Checking - Auto Pay Frozen
- April 1 Bill for \$78.58 Due 04-17-2017 31 days in bill period

March 2017

- March 13 Payment received for \$76.31 Paid by Checking - Auto Pay Frozen
- March 1 Bill for \$76.31 Due 03-16-2017 28 days in bill period

February 2017

- February 13 Payment received for \$78.68 Paid by Checking - Auto Pay Frozen
- February 1 Bill for \$78.68 Due 02-16-2017 31 days in bill period

January 2017

- January 1 Enable Service Type

Previous Next





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Oracle Utilities Customer To Meter Demo 2.9.0.1.0 / 22C

Advanced Search

Current Context

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- 6958394581 6 Egle, Fred, Residential, \$80.95
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Social Security Number *****0183

Account 6958394581 Customer 360

Current Balance **\$80.95** Take a Payment

CIS Division California

Customer Class Residential

Switch Language

Switch To Refresh

Alerts

- Last Contact: 2,203 days ago - Murray, Lynette
- Auto-Pay Active
- Landlord Exists

Bookmarks

Program Enrollment

- Customer is on auto pay** Auto pay active on 01-01-2017 Go To
- Customer is not on e-bill Enroll
- Customer does not have a web account Instruct customer to enroll at utilityco.com

Customer Insights

- Landlord Exists Go To

Usage and Billing Financial History Payment Agreement Credit & Collection

Cost / Usage Cost Time Scale Year View Start Date 03-01-2016 End Date 04-01-2017

USD \$

Month	Electric	Ending Balance
Feb 1	~\$78	~\$78
Mar 1	~\$76	~\$76
Apr 1	~\$78	~\$78

Customer Activity History

Filter By

- April 2017
- April 12 Payment received for \$78.58 Paid by Checking - Auto Pay Frozen
- April 1 Bill for \$78.58 Due 04-17-2017 31 days in bill period
- March 2017
- March 13 Payment received for \$76.51 Paid by Checking - Auto Pay Frozen
- March 1 Bill for \$76.31 Due 03-16-2017 28 days in bill period
- February 2017
- February 13 Payment received for \$78.68 Paid by Checking - Auto Pay Frozen
- February 1 Bill for \$78.68 Due 02-16-2017 31 days in bill period
- January 2017
- January 1 Enable Service Type

Previous Next





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Oracle Utilities Customer To Meter Demo 29.0.1.0 / 22c

Advanced Search

Current Context

- Egle, Fred - Home Phone: (415) 739-0128
- 6958394581 6 Egle, Fred, Residential, \$80.95
- 100 Switch Back Road, Apt. 106, Fremont, CA, 94516

Egle, Fred

Home Phone (415) 739-0128

Primary Email egle.fred@gmail.com

Social Security Number *****0183

Account 6958394581 Customer 360

Current Balance **\$80.95** Take a Payment

CIS Division: California

Customer Class: Residential

Switch Language

Switch To [Dropdown] Refresh

Alerts

- Last Contact: 2,203 days ago - Murray, Lynette
- Auto-Pay Active
- Landlord Exists

Bookmarks

Account: Egle, Fred, Residential, \$80.95 Account ID: 6958394581

Main Auto Pay Persons Financial Balances Bill Messages C & C Budget Deposits Characteristics Alerts Account Portal

Account Auto Pay: 1 of 1

Start Date: 01-01-2017 End Date: Auto Pay ID: 6950785107

Auto Pay Source: 102000076-C Wells Fargo - Checking 102000076

External Account ID: *****6798

Expires On: Name: Egle, Fred

Maximum Withdrawal Amount: \$0.00

Comments





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Oracle Utilities Customer To Meter

Advanced Search

Current Context

- Egle,Fred - Home Phone:(415) 739-0128
- 6958394581 6 Egle,Fred, Residential, \$79.95
- 100 Switch Back Road, Apt. 106, Fremont, CA, 94516

Egle,Fred

Home Phone (415) 739-0128

Primary Email egle.fred@gmail.com

Social Security Number *****0183

Account 6958394581 Customer 360

Current Balance **\$79.95** Take a Payment

CIS Division California

Customer Class Residential

Switch Language

Switch To Refresh

Alerts

Last Contact: 2,220 days ago - Murray,Lynette

Auto-Pay Active

Landlord Exists

Bookmarks

Account

Main **Auto Pay** Persons Financial Balances Bill Messages C & C Budget Deposits Characteristics Alerts Account Portal

Account Egle,Fred, Residential, \$79.95

Account Auto Pay 1 of 1

Start Date 01-01-2017 End Date Auto Pay ID 6950785107

Auto Pay Source 102000076-C Wells Fargo - Checking 102000076

External Account ID *****6798

Expires On

Maximum Withdrawal Amount **\$100.00**

Comments





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Oracle Utilities Customer To Meter Demo 2.9.01.0 / 22C

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Home Phone (415) 739-0128

Primary Email egle.fred@gmail.com

Social Security Number *****0183

Account 6958394581 Customer 360

Current Balance **\$80.95** [Take a Payment](#)

CIS Division California

Customer Class Residential

Switch Language

Switch To

[Refresh](#)

Alerts

- Last Contact: 2,203 days ago - Murray,Lynette
- Auto-Pay Active
- Landlord Exists

Bookmarks

Person

Main Correspondence Info Characteristics Persons Person Portal

General Information

Person ID 3655691353

Person Info Egle, Fred - Home Phone:(415) 739-0128

Customer Notification Preferences

Type	Customer Information	Contact Method	Contact Information
Bill Routing	Egle, Fred, Residential, \$80.95	Postal	100 Switch Back Road, Apt. 106, Fremont, CA, 94516

Self-Service Notification Preferences

Self-Service Payment Options

Payment Option Information	Payment Option Nickname	Recently Used	Edit	Delete
Bank of America - Checking - *****765, Fred Egle	BoA 8765	No	Edit	Delete

Person Attachments

Person Attachments

[Add Payment Option](#)



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Oracle Utilities Customer To Meter

Advanced Search

Current Cont

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6958394581
\$80.95

100 Switch
CA, 94516

Home Phone
(415) 739-0128

Primary Email
egle.fred@yma

Social Security
*****0183

Account
6958394581

Current Balance
\$80.95

CIS Division
California

Customer Class
Residential

Switch Language

Switch To

Refresh

Alerts

Last Contact: 2/2

Auto-Pay Active

Landlord Exists

Bookmarks

Oracle Utilities Customer To Meter

Advanced Search

Add One-Time Payment

Payment Date: 01-13-2023

Payor Account ID: 6958394581 Egle, Fred, Residential, \$80.95

Payment Amount: \$80.95

Tenders - Existing Payment Options

	Payment Option	Tender Type	Tender Amount
+ -		Bank of America - Checking 789456124 - *****765, Fred Egle	
+ -		Wells Fargo - Checking 102000076 - *****6798, Fred Egle	

Tenders - New Auto Pay Options and Other Tender Types

	Tender Type	Tender Amount	Check Number
+ -	Check	\$80.95	

Distribute Action: Distribute and Freeze if OK

Save Cancel



Fred

Meet Fred—he is an engineer with a large IT company

He is enrolled in autopay but with a maximum withdrawal amount on his account for budgetary purposes

He reviews all of his bills monthly and likes to ensure that all balances are paid if possible

He likes simple quick user experiences

Oracle Utilities Customer To Meter

Advanced Search

Current Context

- Egle, Fred - Home Phone: (415) 739-0128
- 6958394581 6 Egle, Fred, Residential, \$0.00
- 100 Switch Back Road, Apt. 106, Fremont, CA, 94516

Egle, Fred

Home Phone: (415) 739-0128
Primary Email: egle.fred@gmail.com
Social Security Number: *****0183
Account: 6958394581 Customer 360

Current Balance: **\$0.00** Take a Payment

CIS Division: California
Customer Class: Residential

Switch Language: Switch To: Refresh

Alerts: Last Contact: 2,228 days ago - Murray, Lynette
Auto-Pay Active
Landlord Exists

Bookmarks

Program Enrollment

- Customer is on auto pay (Go To)
- Customer is not on e-bill (Enroll)
- Customer does not have a web account (Instruct customer to enroll at utilityco.com)

Customer Insights

- Landlord Exists (Go To)

Usage and Billing

Financial History | Payment Agreement | Credit & Collection

Cost / Usage | Time Scale: Year View | Start Date: 03-01-2016 | End Date: 04-01-2017

Month	Electric	Ending Balance
Mar 1 2016		
Apr 1		
May 1		
Jun 1		
Jul 1		
Aug 1		
Sep 1		
Oct 1		
Nov 1		
Dec 1		
Jan 1 2017		
Feb 1	\$78.58	\$78.58
Mar 1	\$76.31	\$76.31
Apr 1	\$79.95	\$79.95

Customer Activity History

Filter By

- Today, February 7
 - Payment received for \$79.95 (Paid by Checking - Auto Pay Frozen)
- January 1-29
 - January 13: Payment received for \$1.00 (Paid by Checking - Auto Pay Frozen)
- April 2017
 - April 12: Payment received for \$78.58 (Paid by Checking - Auto Pay Frozen)
 - April 1: Bill for \$78.58 (Due 04-17-2017, 31 days in bill period)
- March 2017
 - March 13: Payment received for \$76.31 (Paid by Checking - Auto Pay Frozen)
 - March 1: Bill for \$76.31 (Due 03-16-2017, 28 days in bill period)
- February 2017
 - February 13

Previous Next



What does Fred think about his experience?



Fred

“ I love that my energy company allows me to manage my account as I want to--with a simple quick user interface.”

We are always looking for ways to reduce manual work for your teams. We now support automated budget approvals



Sofia

Sofia and her team prefer to automate some processes so that they can focus on value-added work

Sofia reviews the budget auto approval process to ensure it meets their needs

Her utility offers budget billing and would like to have some changes to budgets automatically approved

Sofia and her team are thrilled that they can now focus on value-added work such as finding new ways of increasing rates of customer loyalty!



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Account

Main Auto Pay Persons Financial Balances Bill Messages C & C **Budget** Deposits Characteristics Alerts Account Portal

Account Banks, Beatrice, Residential, \$254.48

[Recommend Budget](#) [Cancel Budget](#)

Budget Plan Residential Budget Plan

New Budget Date 01-17-2023

Current Account Budget \$75.30

Recommended Account Budget \$76.00

Service Agreement	Last Changed Date	Current Budget	Recommended Budget
California / Electric Residential - TOU Rat, ER-TOUMI, Active, 08-01-2018, 9880646289	01-01-2021	\$75.30	<input type="text" value="\$76.00"/>





Sofia

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Her utility offers budget billing and would like to have some changes to budgets automatically approved

Sofia reviews the budget auto approval process to ensure it meets their needs

Sofia and her team are thrilled that they can now focus on value-added work such as finding new ways of increasing rates of customer loyalty!

Algorithm

Bookmark

Duplicate

Main

Algorithm Code * CMBUDMNAU

Description * Budget Monitor with Automated Update Option - HN

Algorithm Type C1BUDMNAU Budget Monitor with Automated Update Option

Alg. Type Descr

This algorithm compares the current budget and the recommended budget and determines if the customer's budget should be updated automatically or if an entry should be created in the Budget Review for manual review if the difference between the recommended and current budget exceeds defined tolerances.
The low tolerances are used when the recommended budget is below the account's current budget and the high tolerances are used when the

Parameter 1 of 1

Effective Date 01-01-1950

Parameter	Sequence	Value
Low Limit First Tolerance Percentage (0-999%)	1	1
Low Limit Second Tolerance Percentage (0-999%)	2	10
High Limit First Tolerance Percentage (0-999%)	3	1
High Limit Second Tolerance Percentage (0-999%)	4	10
Action When Between First and Second Tolerances	5	C1UB
Action When Exceeds Second Tolerance	6	C1RB
Minimum Budget Difference	7	



Sofia

Sofia and her team prefer to automate some processes so that they can focus on value-added work

Her utility offers budget billing and would like to have some changes to budgets automatically approved.

Sofia purchases an electric heat pump and a warranty plan.

Sofia and her team are thrilled that they can now focus on value-added work such as finding new ways of increasing rates of customer loyalty!



What does Sofia think about her experience?



Sofia

“ I am very happy that we can now automate our budget approval process to eliminate unnecessary manual work, so that we can focus on more important work—namely finding new ways of increasing rates of customer loyalty!

Enterprise SaaS



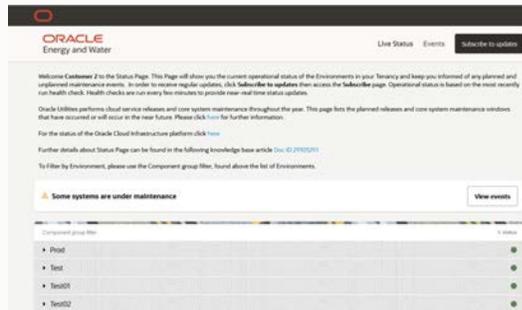
Key Roadmap Focus Areas at a Glance

Customer Cloud Service – Enterprise SaaS

› Service Improvements

- ✓ Service Availability increased to 99.9%
- ✓ Data Center Expansion; Phoenix, Toronto, Montreal

› Status Page

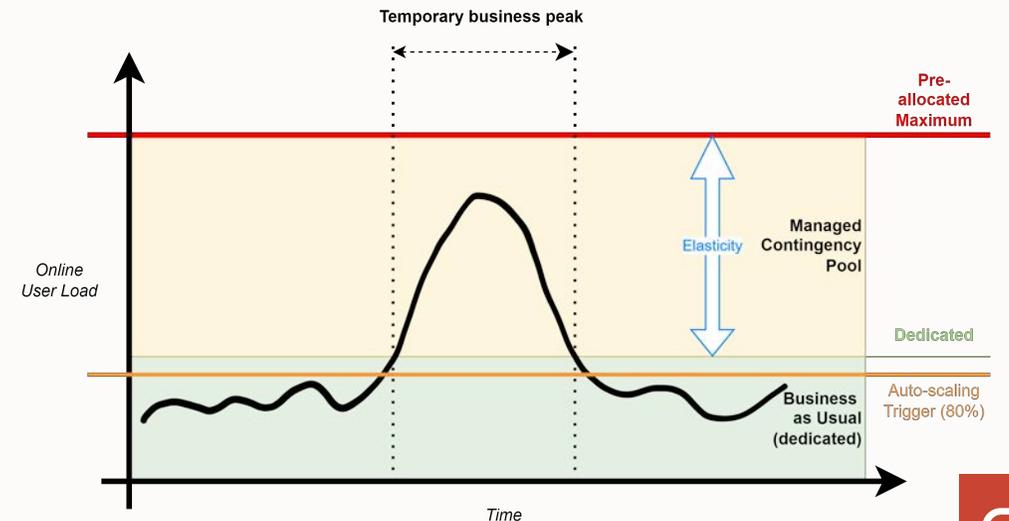


- ✓ Easy access to system health
- ✓ Allows subscription to availability/status/maintenance updates

› Break Glass Workflow



› Improved Online Auto-Scaling





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All systems are operational

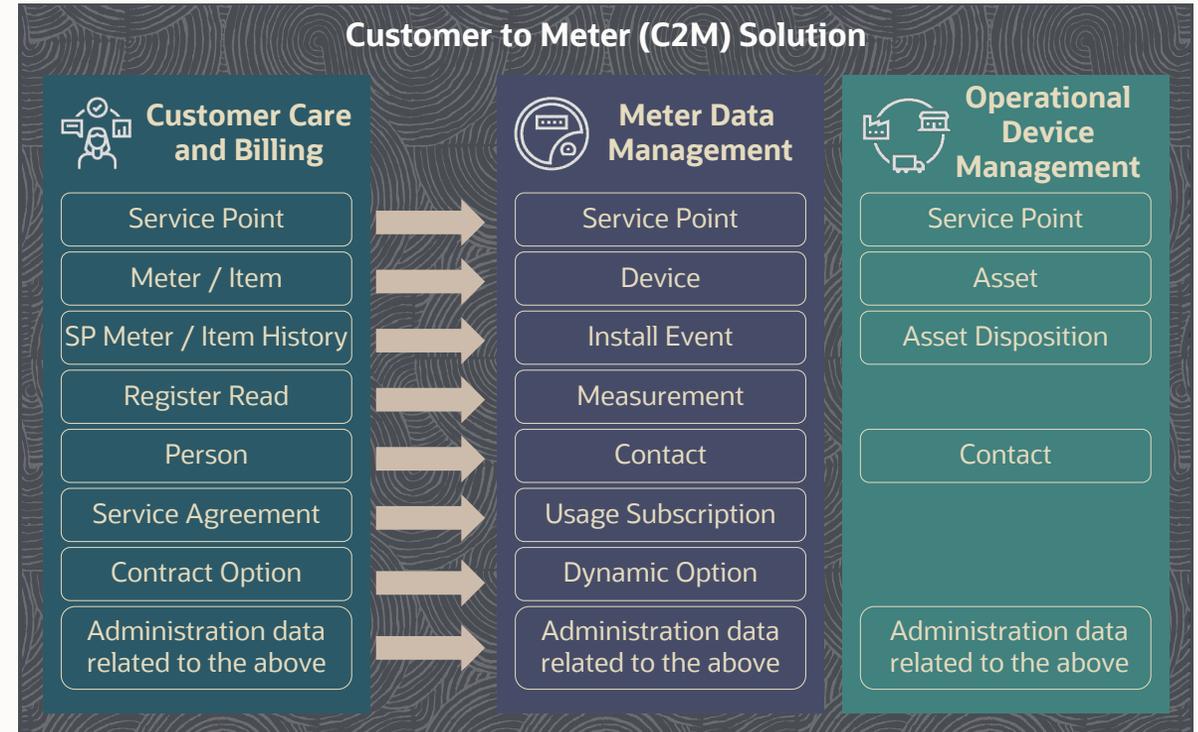
Component group filter	status
▼ US West	●
Phoenix	Service Available
▼ US East	●
Ashburn	Service Available
▼ UK South	●
London	Service Available
▶ Germany Central	●
▼ Australia East	●
Sydney	Service Available

Customer Cloud Service - Simplify Data Migration to CCS/C2M

Making the Transition to Customer Cloud Service Easier



- Uses existing *Customer Care and Billing* data to create *Meter Data Management* and *Operational Device Management* data
 - *Master data, scalar meter reads, and associated administration data*



Customer Cloud Service - On-Premise to SaaS Data Upgrade

Import External DB

- Automated process to import C2M data to CCS
- Customer control over initial database upgrade
- Oracle supports last mile data load to SaaS



Benefits:

- ✓ Faster migration from on-prem to SaaS
- ✓ Customers perform pre-migration conversion work on-premise using their own tools/processes



Customer Cloud Service - Improved tools update testing

- Simplify update testing
- Reduce update cost
- Reduce update risk
- Improve quality

Extensions Dashboard Bookmark Refresh

Main

Extensions Summary ⊗ ⊞ ^

	Maintenance Object	Count
📶	Algorithm Type	2
📶	Application Service	55
📶	Batch Control	1
📶	Business Object	3
📶	Inbound Web Service	1
📶	Inbound Web Service Operation	8
📶	Maintenance Object	2
📶	Migration Plan	1
📶	Migration Request	3
📶	Outbound Message Type	72
📶	Portal	1
📶	Script	9
📶	To Do Type	3
📶	XAI Inbound Service	1

Extension Entities ⊗ ⊞ ^

Filters: Maintenance Object Maintenance Object (MAIN OBJ)

	Entity 📋	Primary Keys	Extended
📶	Activity (W1)	W1-ACT	Yes
📶	Environment Reference	ENV REF	

Extension Details ⊗ ⊞ ^

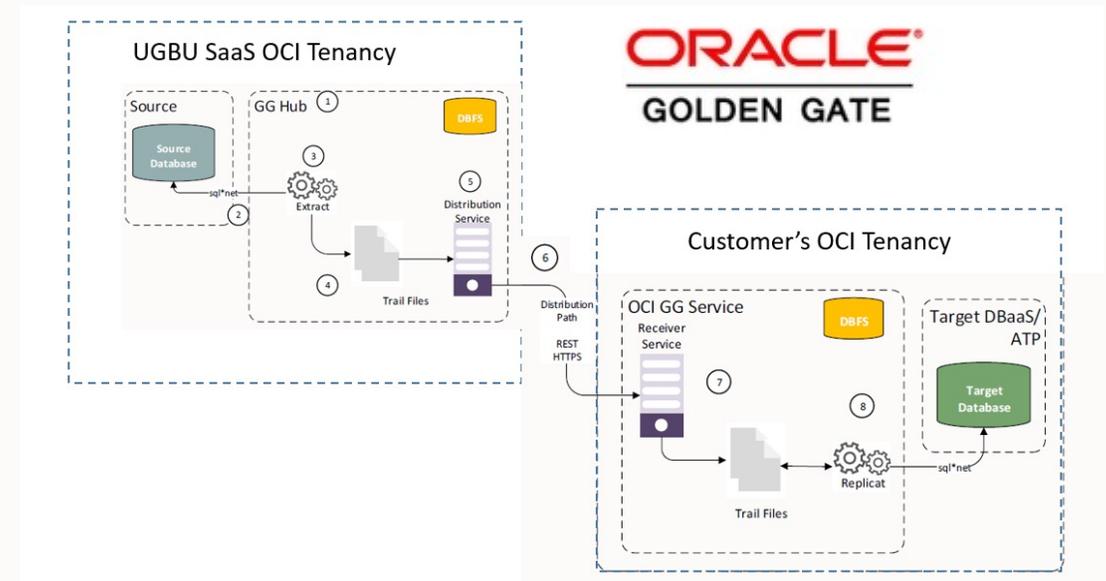
Filters: Maintenance Object Maintenance Object (MAIN OBJ) , Primary Key 1 W1-ACT

Table	Key 1	Key 2	Key 3	Key 4	Key 5
Maintenance Object Option	W1-ACT	F1BP	71	F1SY	

Customer Cloud Service - SaaS to Public Cloud / On-Premise Analytics

SaaS to Customer Data Replication (Golden Gate)

- Replicate data from source (SaaS) environment to on-prem / Public Cloud
- Initial and ongoing sync
- Production and Non-Production environments



Benefits:

- ✓ Maintain local copies of SaaS data
- ✓ 100% in customer control – do what you like
- ✓ Enhanced reporting & data validation
- ✓ Enables high volume, data driven downstream processes

Integrated Utility Platform

Key Roadmap Focus Areas at a Glance

Please join the Oracle
Utilities Application
Framework (OUAF) and
Cloud

Updates & Roadmap,
including Integrations
session

Tomorrow morning-
14 March 10:45-12:00
Room-Seaport GH

Customer Cloud Service - Streamline Work & Asset Integration

- Streamlined call center experience for requests related to infrastructure issues and requests
- Process flow for work and asset related service calls
- Real-time connection with Work & Assessment management
- Support new requests, request updates, and cancellations

Process Flow: Service Call Process

Main Log

Process Flow

1 Service Call Search 2 Location 3 Contact 4 Details 5 Review and

Search

	Create Date/Time	Service Call	Address	Contact
<input type="checkbox"/>	07-29-2022 05:35AM	29_CCS_WACS	street2907, Ohio, 44702	29Test User
<input type="checkbox"/>	07-29-2022 12:56AM	CCS_WACS29, Required By: 07-30-2022	address_29, California, 44702	test User_29
<input type="checkbox"/>	07-27-2022 01:20PM	20220000000122, CCS_WACS_27, Required By: 07-28-2022	Add2007A1, 44720	testscall 04
<input type="checkbox"/>	07-26-2022 02:54PM	20220000000121, CCS_WACS26, Required By: 07-27-2022	Add2007A1, 44720	Test User_26
<input type="checkbox"/>	07-24-2022 09:23AM	20220000000118, CCS_WACS024, Required By: 07-25-2022, Call Back Required	Add2007A1, 44720	Test user_24
<input type="checkbox"/>	07-24-2022 08:31AM	20220000000117, CCS_WACS24, Required By: 07-25-2022	Add2007A1, 44720	
<input type="checkbox"/>	07-20-2022 02:30PM	20220000000114, CCS_WACSSP20, Required By: 07-22-2022	Add2007A1, 44720	testscall 04
<input type="checkbox"/>	07-18-2022 01:06PM	20220000000113, CCS_WACS1807, Required By: 07-19-2022	Address 18, 44702	Test User
<input type="checkbox"/>	07-18-2022 09:09AM	20220000000112, CCS_WACS service call 18, Required By: 07-19-2022	Building 18, 44702	test service 18
<input type="checkbox"/>	07-07-2022 07:10PM	20220000000107, CCS_WACS8_9, Required By: 07-09-2022	Premise 01, 44702	
<input type="checkbox"/>	07-07-2022 06:48PM	20220000000103, CCS_WACS077, Required By: 07-08-2022	Street 0707, 44702	first last
<input type="checkbox"/>	07-07-2022 09:20AM	20220000000102, gsgsdfsf, Required By: 07-08-2022	test, 76543	test ques
<input type="checkbox"/>	07-06-2022 04:57PM	ZZISSUE 0747AM_001	ZZISSUE. 99999	ZZISSUE 0747AM 001

Cancel Process Save Next

Customer Cloud Service – Simplify Omni-Channel Integration with REST APIs

- New REST APIs for to enable
 - Account's current and payoff balances has changed over time
 - Search for Accounts with Filters
 - Viewing Bills and Payments
 - Creating and Update Cases
 - Viewing and managing Landlord Agreements
 - Viewing and managing Budget information for an account
 - Viewing and managing Pay Plans

Industries / Energy and Water / Oracle Utilities Application Framework / 4.5.0.0.0

Oracle Utilities REST API for Metering and Customer Information

Introduction + -

- About the REST APIs
- All REST Endpoints
- Get Started
 - Quick Start
 - Establishing a Connection
 - Testing the REST APIs
 - Reference
- Tasks
 - Credit & Collections
 - Devices
 - Financial Transactions
 - Interactions
 - Service
 - Usage
 - V-Model
 - Account
 - Business Person Queries
 - Communications Preferences
 - Get Communications Preferences
 - Get Mailing Addresses
 - Patch Communications Preferences
 - Update Mailing Address

Communications Preferences REST Endpoints

Sort by Task Path Method

V-Model/Communications Preferences

Centralized maintenance of a person's communication preferences by notification types allowed for an account.

Get Communications Preferences

Method: GET

Path: `https://server:port/spl/rest/apis/customer/v-model/communicationsPreferences/{accountId}/{personId}`

Get Mailing Addresses

Method: GET

Path: `https://server:port/spl/rest/apis/customer/v-model/communicationsPreferences/{accountId}/{personId}/addresses`

Patch Communications Preferences

Method: PATCH

Path: `https://server:port/spl/rest/apis/customer/v-model/communicationsPreferences/{accountId}/{personId}`

Customer Experience

Key Roadmap Focus Areas at a Glance

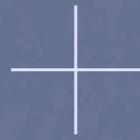
For more information on CX, please join these sessions—both will be in this room

Future of Utility Customer Experiences @ 1:00 today

Empower your key account managers to scale your C&I Business @ 10:0 tomorrow morning

A new way to serve your customers

A Purpose-Built
User Experience



Automated
Core Process Support

Modern Customer Experience

Omnichannel communication incl. chat, co-browse, mobile & messaging

Low effort customer and agent experiences

Guided interactions and process flows

Contextual knowledge

C&I Account Management

Seamless front to back-office integration

Data consistency

Reliability

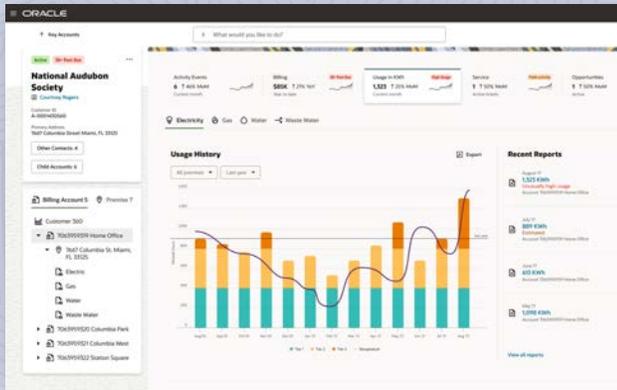
Lower costs

Powered by Oracle CIS
(CCB, C2M, CCS)



Purpose-built CX solutions for Utilities

Sales & Account Management

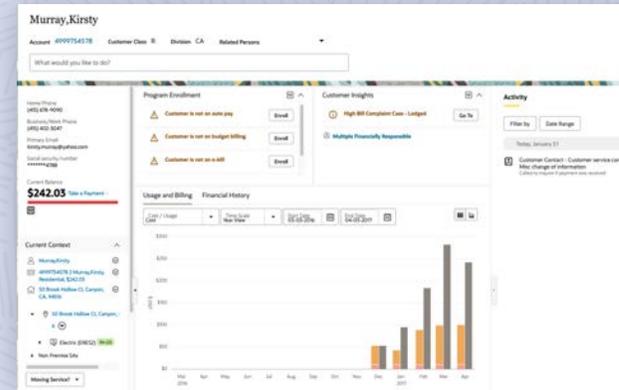


Increase C&I Account Management productivity

Complex Account Management

Drive Program Interest and revenue

Service



Omni-channel Digital Service

Digital Assistant for Conversation Experiences

Contextual Knowledge

Intelligent Case Routing and Response

Efficient Field Service





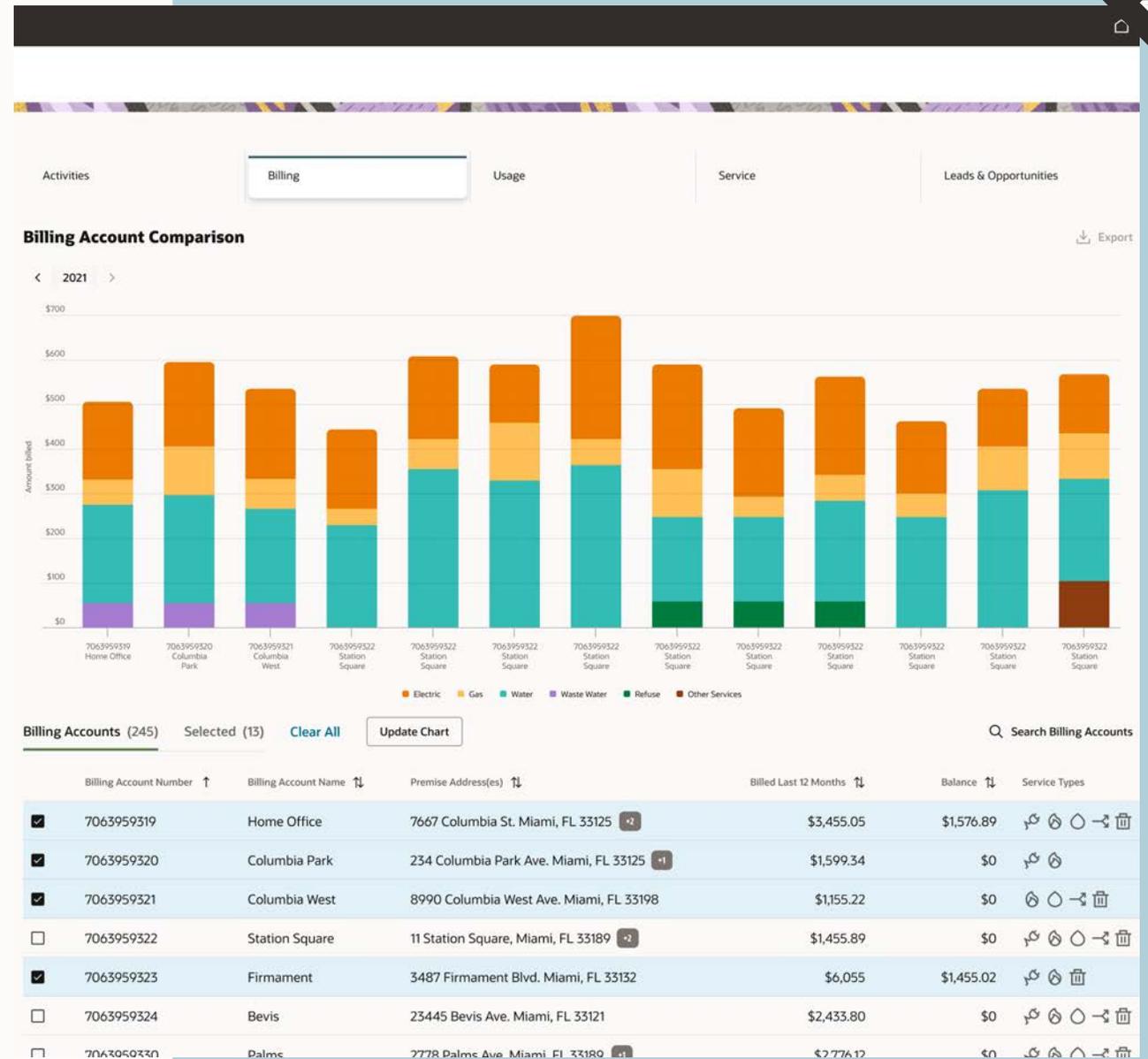
“The biggest gap is that our CRM isn’t integrated; data is pulled from different places and then we run analysis in excel.”

—
Key Account Manager
Large Utility

Sales & Account Management

- Billing 360

- Search across many billing account and premises
- Compare bills across locations
- Drilling into billing account info



Sales & Account Management

- Premise 360

- Visual hierarchy for Premise, Service Point, and Meter
- Seamless navigation to Oracle CIS
- View premise relationships to other bill accounts

Customer 360 > 7063959319 Home Office > Premise and Service Details

7063959319 Home Office Premise and Service Details

4 of 4 premises. [Search all in CIS](#)

- ▼ Premise - 7667 Columbia St. Miami, FL 33125 ...
 - ▼ Service Contract - ID 7581755252, Electric Commercial, TOU Rate, ER-TOUMI, 10/8/2019 Connected Badge ...
 - ▼ Service Point - Electric Commercial / Read Cycle 1, Route 100 ...
 - ▼ Meter - ER-SM-S1500, Electric Smart Meter ...
 - Component - 2 / Electric Scalar kWh - Auto Read ...
 - Component - 1 / Electric Scalar kWh - 60 min ...
 - ▼ Service Contract - ID 7581755253, Gas Commercial, GASDFLT, 10/8/2019 Connected Badge ...
 - ▼ Service Point - Gas Commercial / Read Cycle 1, Route 100 ...
 - ▼ Meter - GR-SM-S1500, Gas Smart Meter ...
 - Component - 2 / Gas Scalar CCF - Auto Read ...
 - Component - 1 / Gas Scalar CCF - 60 min ...
 - ▼ Service Contract - ID 7581755254, Water Commercial (Monthly), W-DFLT-M, 10/8/2019 Connected Badge ...
 - ▼ Service Point - Water Commercial / Read Cycle 1, Route 100 ...
 - ▼ Meter - WR-B1500, Water Manual Read Meter - Analog ...
 - Component - Water Scalar CCF - Manual Read ...
 - ▶ Service Contract - ID 756499345, Waste Water Commercial (Monthly), WWDFLT-M, 1/4/2021 Connected Badge ...
 - ▶ Service Contract - ID 567892789, Refuse Commercial (Monthly), LOREM, 1/4/2021 Active ...
 - ▶ Premise - 1370 Columbia St. Miami, FL 33125 ...
 - ▶ Premise - 23 Cobalt Dr. Miami, FL 33125 ...



Sales & Account Management

- Customer Hierarchy 360

- Hierarchy Viewer
- Aggregated child data across organizations and bill accounts
- Manage hierarchy
- Drill into Bill Account & Premise details

↑ Customer 360

Account Hierarchy: National Audubon Society East

Include Child Data [v] Export [v] Manage Hierarchy

Exclude Child Data

Try searching by account name, address or contact

2 additional levels

National Audubon Society of America
45 Santa Clara Rd. Calumet City, IL 60409
22 Children, 238 Billing Accounts
Billed Last 12 Months \$23,000,000
Open Opportunities \$23,000,000

National Audubon Society East
7667 Columbia Street Miami, FL 33125
Courtney Rogers
(206) 695-9000
courtney.rogers@nationalaudubon.com
Open Service Requests 19
Open Activities 190
Won Opportunities \$19,000,000
Billed Last 12 Months \$19,000,000
Open Opportunities \$19,000,000

Children 18 Billing Accounts 46 Sat 08:49 (UTC+05:30)

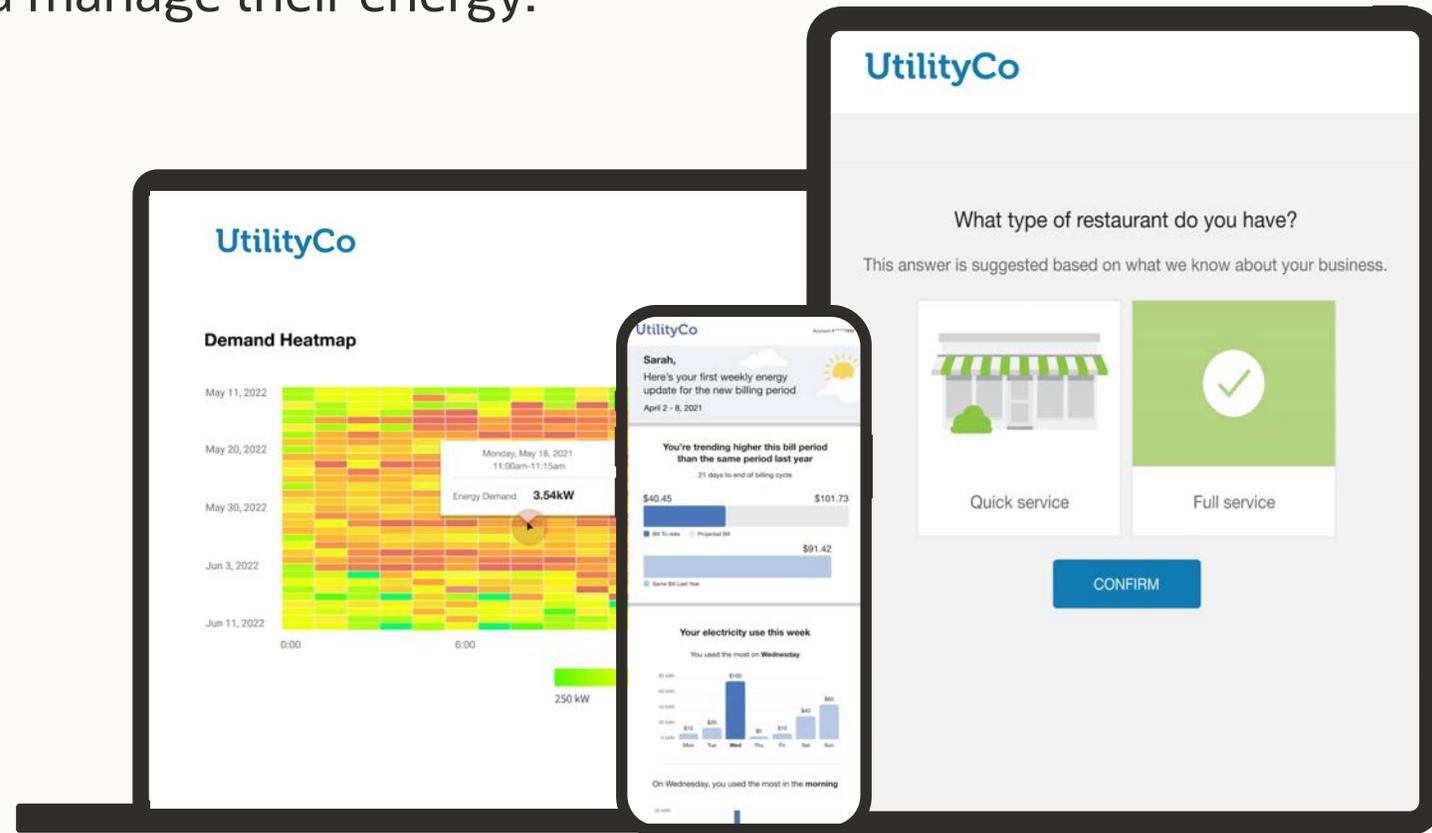
<p>National Audubon Society of Ohio 59 South St. Aliquippa, OH 15001 2 Children, 5 Billing Accounts Billed Last 12 Months \$3,000,000 Open Opportunities \$3,000,000</p>	<p>National Audubon Society of New York 349 West Angel St. Brookhaven, NY 30319 2 Children, 5 Billing Accounts Billed Last 12 Months \$3,000,000 Open Opportunities \$3,000,000</p>	<p>National Audubon Society of North Carolina 754 Ryan Street Mocksville, NC 27028 2 Children, 5 Billing Accounts Billed Last 12 Months \$3,000,000 Open Opportunities \$3,000,000</p>	<p>National Audubon Society of South Carolina 991 Center St. Florence, SC 29501 2 Children, 5 Billing Accounts Billed Last 12 Months \$3,000,000 Open Opportunities \$3,000,000</p>
<p>National Audubon Society of Tennessee 789 North St. Murfreesboro, TN 37127 2 Children, 5 Billing Accounts Billed Last 12 Months \$3,000,000 Open Opportunities \$3,000,000</p>	<p>National Audubon Society of West Virg... 8875 South East St. Clarksburg, WV 26301 2 Children, 5 Billing Accounts Billed Last 12 Months \$3,000,000 Open Opportunities \$3,000,000</p>	<p>National Audubon Society of North Carolina 754 Ryan Street Mocksville, NC 27028 2 Children, 5 Billing Accounts Billed Last 12 Months \$3,000,000 Open Opportunities \$3,000,000</p>	<p>National Audubon Society of South Carolina 991 Center St. Florence, SC 29501 2 Children, 5 Billing Accounts Billed Last 12 Months \$3,000,000 Open Opportunities \$3,000,000</p>



Opower Business Customer Engagement

A complete, reimagined suite of solutions to empower business customers to understand and manage their energy:

- Engaging **Web**
- Rich **Outbound**
- Seamless **Analytics**
- Effective **Customer Service and Key Account Manager Support**



Transforming Service

64%

...find it challenging to strike a balance between profitability and transforming the customer experience.

- Accenture New Energy Consumer Study



Service

Empowering customers and employees with low effort experiences



Digital first
service
experience



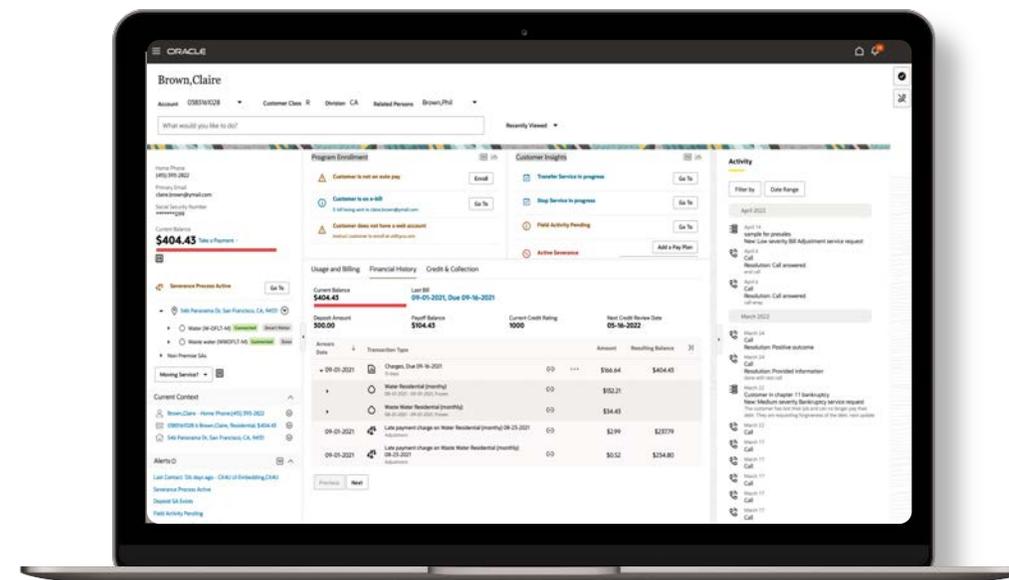
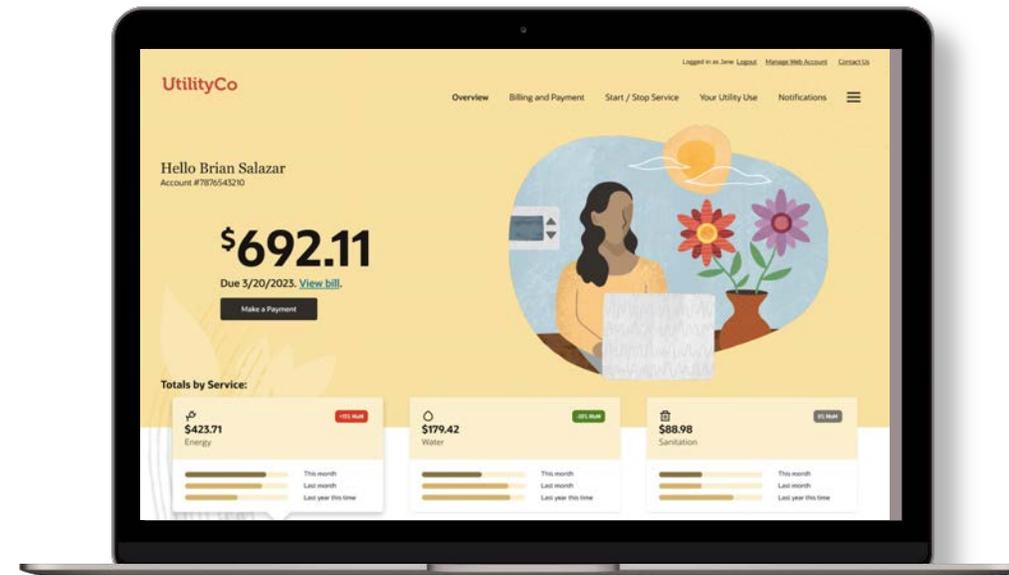
Customer 360



Intelligent
Service
experience



Integrated
CX & CIS



Agent Service

Improve the agent experience and lower integration costs



Digital first service experience



Customer 360



True omni-channel engagement



Intelligent & context aware

The screenshot displays the Oracle Applications interface for a utility customer named Gina Elliot. The interface is organized into several sections:

- Account Information:** Account number 9940491655, Customer Class R, Division CA, and Related Persons Elliot, Brett. A search bar asks "What would you like to do?".
- Contact Information:** Cell Phone (807) 908-0098, Primary Email ginaelliot@gmail.com, Secondary Email gina.elliot@work_email.com, and Social Security Number *****7798.
- Current Balance:** \$69.27 with a "Take a Payment" button.
- Program Enrollment:** Three alerts: "Customer is not on auto pay", "Customer is not on a bill", and "Customer does not have a web account". Each has an "Enroll" button.
- Customer Insights:** "Past due: \$69.27" with "Add a Pay Plan" and "Add a Payment Arrangement" buttons. A note states "Customer is trending towards using 4% less electricity compared to the last bill period" with a "View" button.
- Usage and Billing:** A bar chart showing usage over time. The Y-axis is labeled "\$ (K)" and ranges from 0 to 160. The X-axis shows months from February 2021 to February 2022. The chart shows usage fluctuating between approximately \$60 and \$140.
- Activity:** A section for "February 2025" with a "Filter by" and "Date Range" dropdown. It lists activities such as "Call Resolution: Provided information" and "Front yard damaged!".

Customer List

Residential and Business Billing Accounts and Contacts

Actions

Search: Name gina

- Name
- Billing Account ID
- Phone Number
- Email
- Address
- Primary Identifier
- Geo Type

Billing Account ID	Type	Billing Account ID	Address	Primary Identifier	Primary Phone	Primary Email	CIS Division	Actions
	Contact				+1 (546) 786-1064	gina.dsouza_eqjr-dev2@oraclepdemos.com		...
	Customer	9940491655	1900 Great Dane Dr, San Francisco, CA, 94103	SSN *****7788	+1 (807) 908-0098	ginaelliot@gmail.com	CA	...

Agent Service – Special Correspondence Email

- Send and respond to emails within the Customer 360
- Leverage SmartText templates to reduce AHT
- Find and view historical emails

The screenshot shows the Oracle Agent Service interface for composing an email. At the top, the recipient is identified as 'Villa, Maria'. Below this, there are fields for 'Account' (9495717263), 'Customer Class' (R), 'Division' (CA), and 'Related Persons' (Dubois, Gabrie). A text input field contains the placeholder 'What would you like to do?'. The 'Channel Type' is set to 'E-Mail', and the 'Channel' is also 'E-Mail'. The 'To' field contains 'Maria Villa' and the 'Cc' field contains 'Gabriel Collins'. The email body text reads: 'Sending you your latest bill', 'Dear Ms. Villa,', 'Please find attached your latest bill as discussed on the call.', and 'Thanks, Service Agent'. The interface includes a rich text editor with a toolbar and a 'Send' button.



Agent Service – Low Code Intelligent Automation

23A

- Configure not code new form based wizards
- Personalized assistance for agents and customers
- Consistent policy and business rules across channels
- Use natural language to determine business rules
- Connect to any app

The screenshot displays a multi-step wizard interface. The current step is 'Eligibility And Pay Plan Selection', with 'Back' and 'Next' buttons. A progress bar shows three steps: 1. Eligibility And Pay Plan Selection (active), 2. Pay Plan Details, and 3. Plan Confirmation. The account information is as follows:

Field	Value
What is account Number?	6461833682
Arrears Age	50
Last payment age (days)	58
Credit Score	385
Delinquent Debt	\$69.10
New Charges	\$69.10
Current Balance	\$138.20

Based on the account information below, **Penelope King** is eligible for a payment plan.

- Delinquent Debt: \$138.20 - Eligible
- Credit Rating: 385 - Eligible
- Days Past Due: 50 - Eligible
- Last Payment Date: 58 days - Eligible

List Payment Options:

Option	Description	Recommended Plan
Option 3	3 equal payments of \$46.07 with the payments due in 7, 14 and 21 days	Select this plan <input type="checkbox"/>
Option 4	4 equal payments of \$34.55 with the payments due in 7, 14, 21 and 28 days	Select this plan <input type="checkbox"/>



Agent Service – Contextual Knowledge

- Improved knowledge search
- Landing page with critical article
- Operating company specific articles
- Interactive Call Guides

The screenshot displays the Oracle Agent Service interface for a customer named Gina Elliot. The main dashboard includes a search bar with the text "What would you like to do?", contact information, a current balance of \$127.41, and service status for Electric (ER-TOUMI). A "Usage and Billing" section features a bar chart showing ending balance, other services, and electric usage from February to February. A sidebar on the right titled "Article reference" shows a search bar and a selected article titled "Credit and Collections Process" with a question and answer section.

Oracle Agent Service Interface Details:

- Customer Profile:** Elliot, Gina; Account: 7451071348; Customer Class: Residential; Division: California.
- Program Enrollment:** Customer does not have a web account. Instruct customer to enroll at utilityco.com.
- Customer Insights:** Pending Start, Premise Has Multiple Accounts.
- Usage and Billing:** Cost/Usage Cost, Time Scale Year View, Start Date 02-01-2020, End Date 03-01-2021. Chart shows Ending Balance, Other Services, and Electric usage.
- Article Reference:** Search all articles; Credit and Collections Process; 6/4/18 By kmtest1 svc; SOL3; 0 ratings.



King, Penelope

Account **6993182049** Customer Class **Residential** Division **California** Related Persons **King, Penelope (Main customer)**

What would you like to do?



Cell Phone
(803) 456-2233
Primary Email
penelopeking@gmail.com

Current Balance
\$271.01 [Take a Payment](#)

1300 Richmond Blvd, San Francisco 94103
Water (W-DFLT-M) On Manual Meter

Moving Service Service Issue

Financial Information Alerts Override System Date
Process Date: 2022-12-06
Override Date:
User System

Program Enrollment

- Customer is not on auto pay [Enroll](#)
- Customer is not on budget billing [Enroll](#)
- Customer is not on e-bill [Enroll](#)

Customer Insights

- 1 accounts had service at this premise in the last 12 months. [Go To](#)
- Active Severance - Water [Add a Pay Plan](#) [Add a Payment Arrangement](#)

Usage and Billing **Financial History** **Payment Agreement** **Credit & Collection**

- Collection Process - Residential Standard Utility Debt, Normal utility debt, Created: 11-22 5:40:30 **Inactive, Completed**
 - Event 10 - Regulated debt reminder letter, Trigger Date: 11-17-2022 **Completed, 11-17-2022**
 - Customer Contact - Credit and collection contacts / Regular debt reminder letter
 - Event 20 - Automated collections call, Trigger Date: 11-28-2022 **Completed, 11-28-2022**
 - Customer Contact - Credit and collection contacts / Collection auto-dialer call
 - Event 30 - Start Sev for all SAs in Coll, Trigger Date: 12-02-2022 **Completed, 12-02-2022**
 - Event 40 - Affect credit rating by 25 points, Trigger Date: 12-02-2022 **Completed, 12-02-2022**
 - SA - Water Residential (monthly), Active, 01-04-2022
 - Severance Process - Standard utility severance, Created: 12-02-2022 **Active, Events Pending**
 - Event 10 - Disconnect warning, Trigger Date: 12-09-2022 **Pending**
 - Event 20 - Disconnect service for non-payment, Trigger Date: **Pending** **Dependent on Events: 10**

Activity

Filter by Date Range

- Credit Rating - Collection Process Expires 12-02-2023 Affects Credit Rating by: -25
- November 2022
 - November 28 Customer Contact - Credit and collection contacts Collection auto-dialer call
 - November 17 Customer Contact - Credit and collection contacts Regular debt reminder letter
 - November 17 Collection Process - Residential Standard Utility Debt - Normal utility debt Inactive (Completed)
 - November 1 Bill for \$139.59 Due 11-16-2022 31 days in bill period
- October 2022
 - October 16 Payment received for \$200.00 Paid by Cash Frozen
 - October 1 Bill for \$331.42 Due 10-17-2022 30 days in bill period
- September 2022
 - September 13 Payment received for \$128.52



Intelligent Advisor

Intelligent Advisor Hub

Intelligent Advisor Hub is where projects are managed, shared and deployed. It is also used to configure user permissions and connections.



What's new in 23A



Get started



Further assistance

To model rules and interviews, download Oracle Policy Modeling (requires Microsoft Windows) or create a decision service or flow project in the Hub.

[Download Policy Modeling](#)

Projects

Last accessed

	createPayPlan UGBU Workspace	7 minutes ago
	UGBU Payment Plan2 UGBU Workspace	1 day ago

[View all projects](#)

Deployments

Last updated

	createPayPlan UGBU Workspace	1 day ago
---	---------------------------------	-----------

[View all deployments](#)

Connections

[View all connections](#)



City of Los Angeles relies on Oracle CX to assist at-need residents during COVID-19 crisis

Rapidly implemented a solution to manage the urgent distribution of millions in donations to qualified residents below the poverty line

Automated assistance with eligibility verification and appointment booking, making it easier for thousands to quickly receive funds

Enabled better case reporting and social distancing across 21 distribution centers through controlled appointment flow

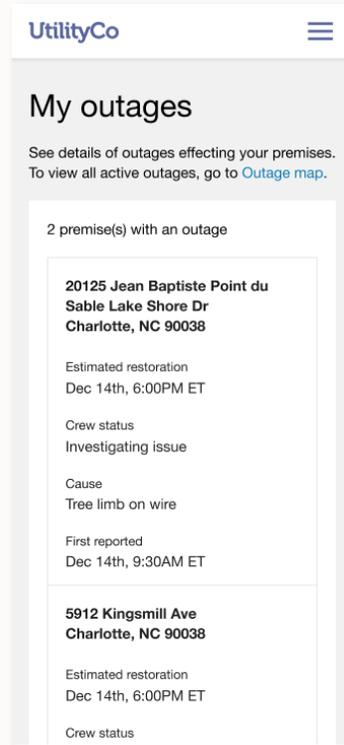
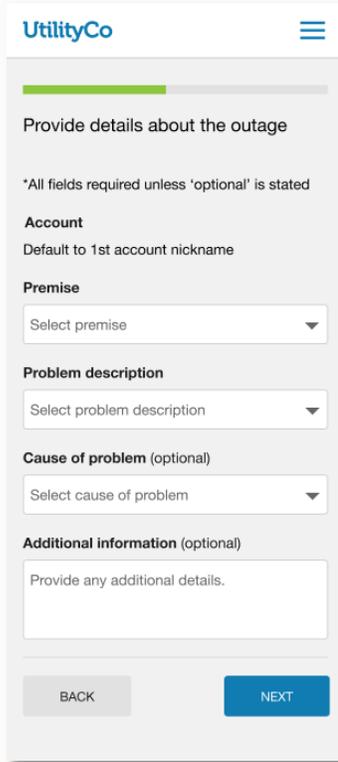
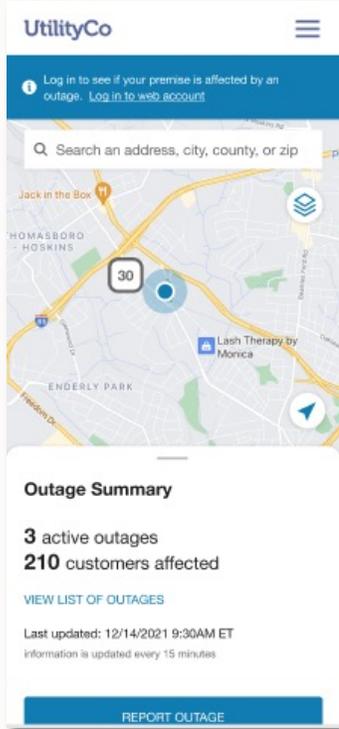


50,000 Appointments booked, resulting in the distribution of almost \$37M to over 100,000 vulnerable residents

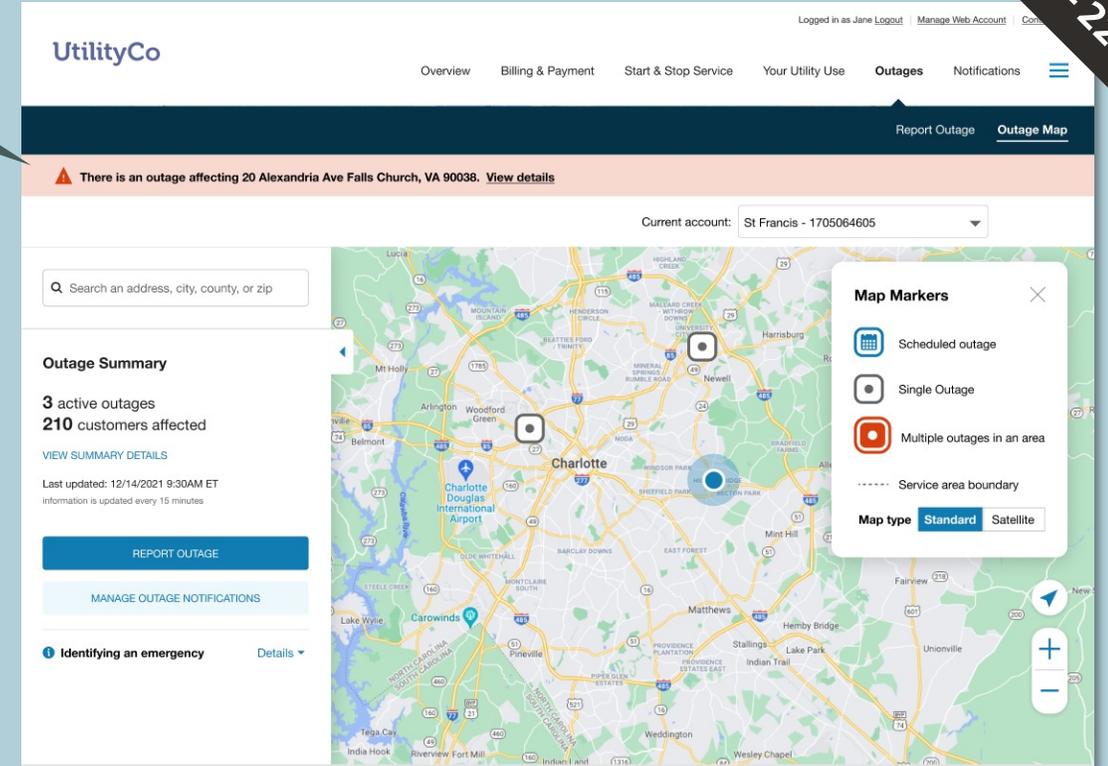


Digital Service - Outage Experience

Supports both authenticated and unauthenticated experiences



View, Report, and Track Outages

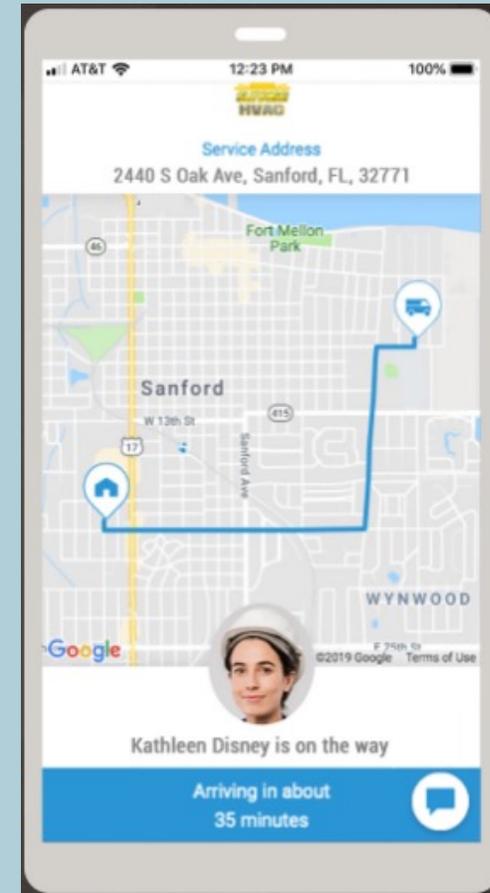
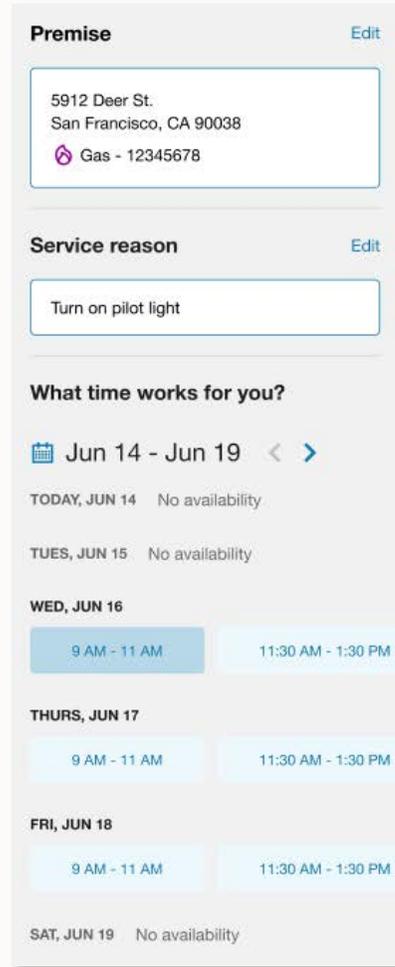
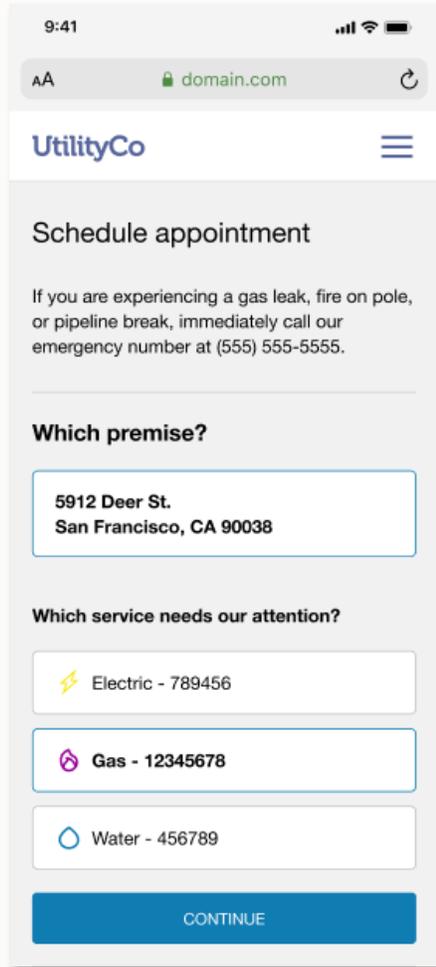


- A new outage map provides a visual indication of outages throughout the utility's service territory
- Personalized experiences immediately tell a user whether their own premises are impacted
- Productized integration between DSS, CCS, and NMS allows for simple setup and long term durability through upgrades

DSS-22C



Digital Service - Appointment Scheduling



- Easily view and schedule appointments for various types of field work with real-time integration to appointment slots in OFSC
- Customers can track their field technician to see exactly when they'll be arriving



Digital Service - Start, Stop, Transfer

- Re-architected SST experience which utilizes the customer service request object in C2M rather than orders and packages
- Adds additional capabilities related to:
 - Identity Check
 - Deposits
 - Select services to start
 - Mailing address validation
 - Duplicate identity check
 - Co-applicants with identity check
 - Conditional questions
 - Access & safety

Address Verify Identity Co-applicant (optional) Serv...

Select service to start

🏠 11 Page St., San Francisco, CA 94043

Electric (5 meters)

Electric residential (Meter ID: 124879124)

Electric residential (Meter ID: 980097461)

Electric residential (Meter ID: 980097461)

Electric residential (Meter ID: 144008273)

Electric residential (Meter ID 5: 144008273)

Gas (2 meters)

Service Details Contact Info

Enter your contact information

Phone number
(847) 555-0004 (Home Phone) [Edit](#)

Mailing address

2349 Boston ST SE Apt# 2

Albany OR 97321

The address you entered seems to have an error. Please review our suggestion below.

<input checked="" type="radio"/> Entered address:	<input type="radio"/> Suggested address:
Kelly Hoffman 2349 Boston ST SE Apt 2 Albany, OR 97321 United States	Kelly Hoffman 2349 Boston ST SE Apt 2 ALBANY, OR 97322-5879 United States

[Edit entered address](#)

UtilityCo

Ser... Ver... Con... **Deposit** Rev...

Deposit

Installment details

3 installments \$25.00 per bill

Total deposit amount

\$75.00

The installment amount will appear on your initial bill and succeeding bills, depending on the number of installments shown. Each installment amount must be paid by each bill's due date. You can pay online, by phone, at an authorized payment agency, or by mail.

[Interest and release](#)

[BACK](#) [NEXT](#)

Who is required to pay a deposit?
As a new customer, you may be required to pay a deposit if you do not meet the requirements of UtilityCo's credit-score assessment.

How do you calculate my deposit?
Your deposit is calculated based on your credit history, as well as the historic average monthly consumption at the premise.

UtilityCo

Service... **Verify...** Contact... Review...

Verify your identity

First Name (required)
Johnny

Last Name (required)
Doe

Social security number (required)
xxx -xx-1234

Drivers license
B123456

I consent to have my identity and/or credit checked through a third-party company. See our [Privacy Policy](#).

[BACK](#) [NEXT](#)

Please add one or more forms of ID
Providing multiple forms of ID can speed up the verification process and may also help you to avoid a deposit.

DSS - 23A



Enhanced Digital Service Experiences with Oracle CX

Modern Extensible Portal and Widgets

- Pixel-perfect Customer Portal for self-service.
- Embedded, persistent inlays across the website.
- AI driven conversational Experiences for chat, text, and voice interfaces to drive call deflection

Knowledge and Intelligent Advisor

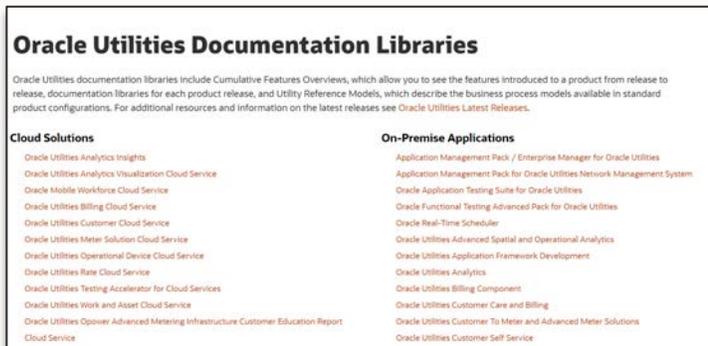
- Provide consistent answers with a self-learning knowledge base and widgets.
- Deliver Personalized Advice tailored to each unique customer's context with Intelligent Advisor.

The screenshot displays the UtilityCo website interface. At the top, the UtilityCo logo is on the left, and navigation links for 'Overview', 'Billing and Payment', 'Start / Stop Service', 'Your Utility Use', and 'Notifications' are on the right. A user is logged in as 'Jane'. The main content area features an article titled '5 Ways to Save Money on Your Water Heating Bill' with a decorative image of a person in a winter coat. Below the article, there is a text block explaining energy use and a list of strategies, with the first one being '1. Switch to a Tankless Water Heater' accompanied by a leaf icon. On the right side, there is a dark widget asking 'Interested in upgrading equipment or appliances?' with a 'Get Started' button. Below that, a chat widget titled 'Ask me' is open, showing a conversation about equipment upgrades and a question about the user's home age.

Where Can I Learn More About...

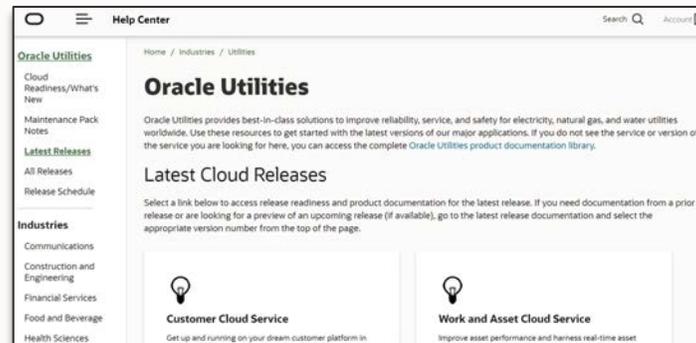
Product Documentation

Find information on the latest Oracle Utilities releases [here](#)



Cloud Release Info

Find information on the latest Oracle Utilities Cloud releases [here](#)



Future Roadmap

Refer to this PowerPoint



Existing Releases

Future Releases



We Want To Hear From You

We plan to survey all of our customers in 2023.



Forums...an online community platform

Forums Search... Sign In

Developer Community New Post

This is a BETA environment ^

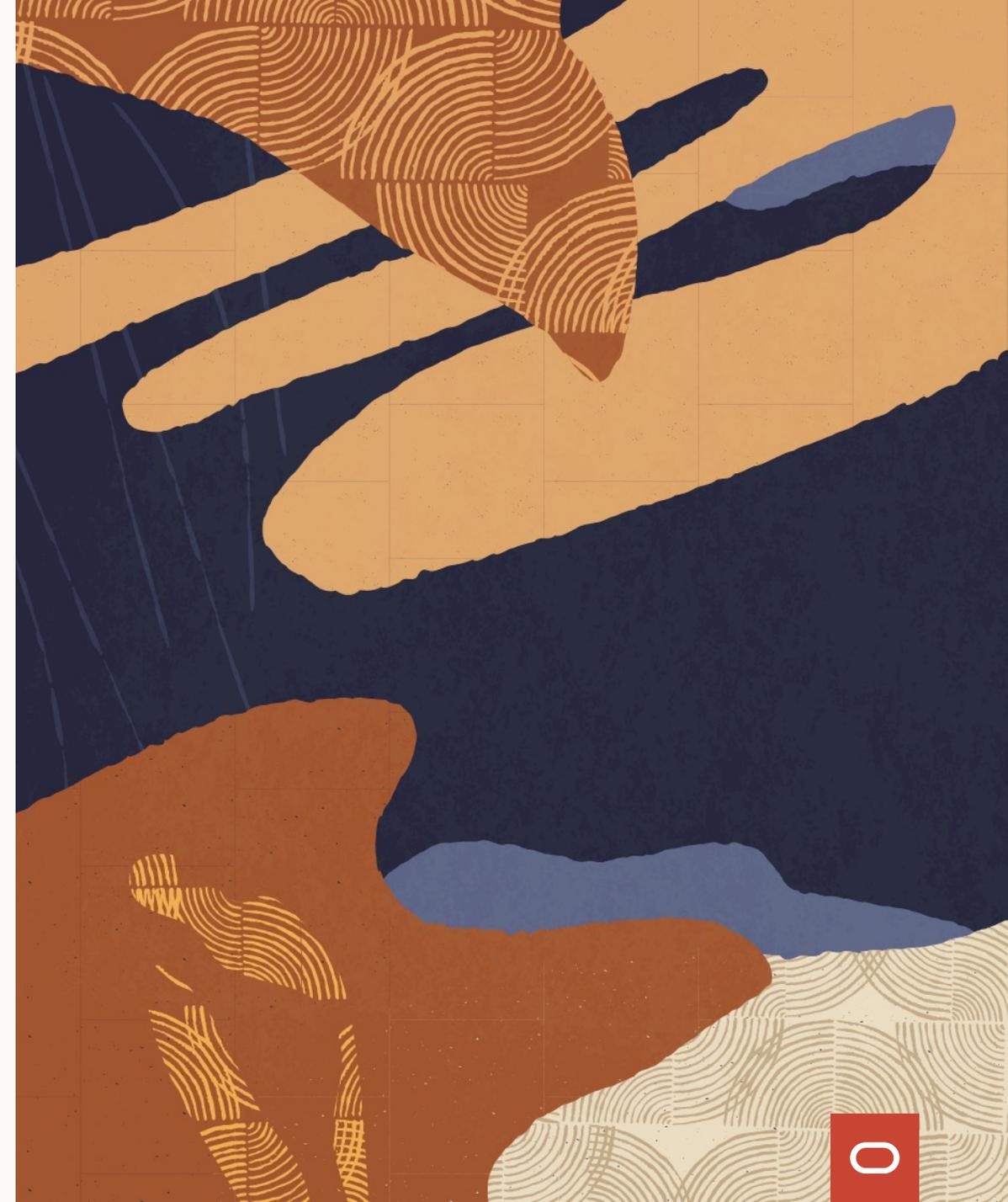
This environment is only for testing and may be reset multiple times during the testing period. We will be frequently upgrading this BETA environment, so check back often for changes. Please assist us by providing feedback via the bug icon to the left of your profile avatar. For the current active community, visit <https://community.oracle.com/tech/developers/>.

Energy and Water

Analytics - Analytics Warehouse, Analytics Insights, Lake House	222.1k Posts 1.1m Comments
Asset Solutions Work and Asset, Operational Device, Digital Asset	3.8k Posts 5.7k Comments
Customer Solutions - Customer, Customer Care and Billing, Billing, Rates, Customer to Meter	563 Posts 1.1k Comments
Enterprise Technology – Framework, testing accelerator, SDK	478 Posts 1.4k Comments
Grid Solutions – Live Energy Connect, Network Management System	3.1k Posts 9.8k Comments



Thank you



Let's Eat!

Lunch
Harbor Ballroom, Level 2
12:00-1:00

What's Next in Here?

Future of Utility Customer Experiences

Join this session to see the full breadth of Oracle Energy & Water customer solutions in action. We'll see how a fully integrated front to back-office customer platform delivers seamless connected experiences.

Play Edge Quiz Game to help us donate more trees!

Customer Transformation



Enterprise Optimization & Execution



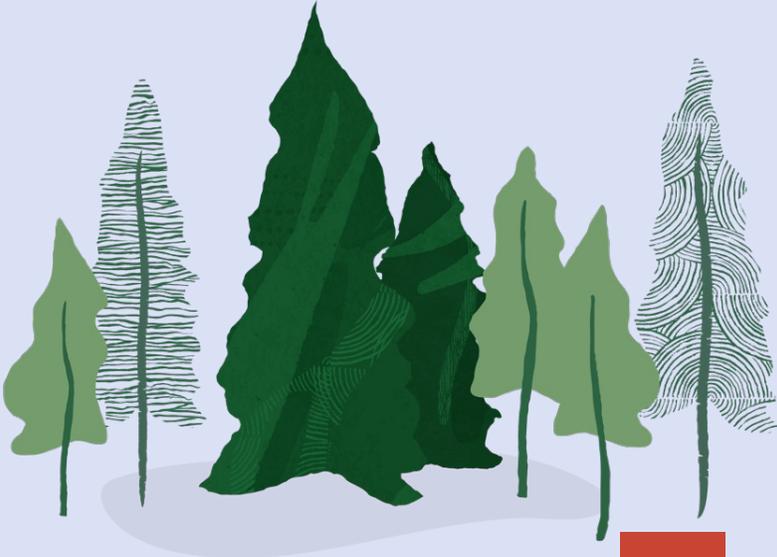
Grid Modernization



Opower Customer Engagement and Decarb



Technology & Cloud Transformation



Our mission is to help people see
data in new ways, discover insights,
unlock endless possibilities.



ORACLE