

FIRSTFUEL
FIRSTENGAGE Web Portal

Product Specification

Revision 1.0 – June 2017

FIRSTENGAGE Web Portal

FirstEngage includes the following features and capabilities across its two main components: (1) Customer-Facing Web Portal, (2) Utility Administration Tools.

(1) Customer-Facing Web Portal

Portfolio Dashboard

| Feature | Definition |
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| Site Billing History | Billing history chart views for single and multi-site customers. User options to toggle timeframe views (monthly) and fuel types (electricity and gas). |
| Site KPIs | Site-level KPIs to illustrate cost and usage drivers. These include number of service points, recent charges and last-month comparisons, planned savings potential, self-audit percentage completion, and more. |
| Portfolio Actions | Configurable utility-defined actions available on the Portfolio page. Actions are personalized advertisements that provide links to desired customer journeys. For example: 1) Self Audit, 2) Understand My Usage, 3) View Ways to Save. |

Site Dashboard: Data Presentment and Analytics

| Feature | Definition |
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| Compare Charges | Compares a customer’s bill to their previous bill, or to the corresponding bill from the same time period of the previous year (if enough data is available). Displays personalized ‘Charge Insights’ that attribute bill variance to various categories, including weather, operations and other factors, and days in billing period. Enhancements for this feature are available via the Enhanced Billing Add-On. |
| Electricity and Gas Cost | Displays electricity and gas cost over historical periods. Users can see monthly trends with temperature overlaid to correlate changes in cost with changes in weather. |

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| | <p>Cost can be plotted for a site, or can be plotted for a specific service point for more granular analysis. Data may be downloaded as a .csv for offline analysis.</p> |
| Energy and Gas Usage | <p>Displays electricity and gas consumption over historical periods with configurable timeframe views (monthly, weekly, daily, hourly intervals). Users can toggle fuel types. Temperature overlay helps user correlate changes in temperature with usage increases/decreases.</p> <p>Usage can be plotted for a site, or can be plotted for a specific service point for more granular analysis. Data may be downloaded as a .csv for offline analysis.</p> <p>Events such as Daylight Savings Time and completed Actions are shown, and users can add custom notes to track abnormalities or changes.</p> <p>➤ Note: Weekly, daily, and hourly views require Interval Data.</p> |
| Demand (kW) | <p>Displays demand profiles over configurable timeframe views (e.g. monthly, weekly, daily, hourly, and interval).</p> <p>Demand can be presented for each 15-minute interval or as a peak value for the day or bill period.</p> <p>➤ Note: Requires Interval Data.</p> |
| Weather Impact | <p>Plots site usage and disaggregates into base load and weather-impacted load, separating weather-related from non-weather-related energy consumption.</p> |
| Schedule Impact | <p>Overlays a site's operating schedule on a heat map of energy consumption over an average week. This analysis identifies abnormal usage patterns compared to baseline conditions.</p> <p>Operating schedules can be automatically detected using pattern matching or manually entered by the customer.</p> <p>➤ Note: Requires Interval Data.</p> |
| End Use Estimates | <p>Displays Site/Building and load-specific end-use estimates based on a unique model of each site. This provides a disaggregated view of energy usage to help users understand what factors are impacting their energy usage. The analysis incorporates weather and usage data to show heating, cooling, lighting, and other categories. The disaggregation can also be compared to other similar sites, to find the biggest opportunities for energy savings.</p> <p>➤ Note: For sites with only monthly meter data, End Use Analysis shows an annual breakdown.</p> |

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| Peer Comparison | Displays graphic comparisons of a site’s energy usage to similar business and building types, based on FirstFuel’s proprietary peer grouping methodology. |
| Data Export/Download | Provides formatting and download of all data, charts, and graphs from the Portal. Supported export formats include: CSV, PDF, Image (charts only) |

Site Dashboard: Recommendations and Action Planning

| Feature | Definition |
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| Energy Savings Recommendations | <p>Advanced analytics-based models of 125+ primary activity types generate personalized energy savings measures for every site.</p> <p>Recommendations are automatically filtered for each site based on that Site’s energy usage and Site Profile information.</p> <p>Recommendations are selected from FirstFuel’s proprietary, custom-built catalog, and include educational messaging, estimated energy savings, payback, and carbon reduction information.</p> <p>Includes ranking of tips for each customer by relevance (e.g., expressed interest) or savings potential.</p> <p>A default System Action displays when Recommendations are not available for a business.</p> |
| Utility Actions | Utility actions containing links to applicable utility programs/rebates or third party websites may be associated with all relevant Recommendations. |
| Savings Plan Creation | <p>Tracks user interest and progress in implementing Energy Savings Recommendations, including capabilities to:</p> <ul style="list-style-type: none"> • Review and adjust plan over time • Indicate intention to implement Recommendations • Mark Recommendations as complete |

Site Dashboard: Profile/Self-Audit

| Feature | Definition |
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| Profile Questions (Basic and Advanced) | <p>Basic Site Profile questions capture key information about the Site, the Primary Activity at the Site, physical details of the building, occupancy, etc. This data is also used by the Customer-facing Web Portal to drive the personalized experience, insights, and analytics.</p> <p>Utilities can specify additional Advanced Site Profile questions for data gathering purposes. Configurable messaging indicates the benefits of providing site profile information.</p> |
| Self-Audit Report | <p>Self-Audit questionnaire provides a customized energy analysis for highly engaged customers. Self-Audit Reports are available for download as PDFs.</p> |
| Onboarding Survey | <p>Presents the Basic Site Profile questions the first time a customer accesses their Site Dashboard to encourage participation in completing the Site Profile. Each window of the survey displays a different category of questions and each question has a standard set of response options.</p> |

(2) Utility Admin Tools

| Feature | Definition |
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| CSR Search and Read/Write Co-Browsing | <p>Customer Service Representatives (CSRs) are provided with tools and insights that enable them to better address inbound inquiries and provide superior customer service. This includes:</p> <ul style="list-style-type: none"> • Access to all customer information on the Customer-Facing Web Portal • Customer search by name, account number, or e-mail address • Co-browsing with single-site and multi-site customers, including read/write access • List view of all historical email communications sent to an individual user via the Portal |
| Customer Web Activity Intelligence | <p>CSRs and marketing managers are provided with intelligence to better understand customers and design targeted engagements (e.g., marketing campaigns). This includes tools to:</p> <ul style="list-style-type: none"> • View population-level statistics about user behavior, including metrics such as Portal log-ins, unique visitors, new visitors, average duration of each visit, email open and click through rates, etc. • View population-level engagement statistics for Energy Saving Recommendations (ECMs). |

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| | <ul style="list-style-type: none"> Segmentation tools by Utility-defined customer segment and business type to create more specific reports and analyses. |
| Email Export Tool | Enables in-app email communication by CSRs. CSRs can email a chart as a .pdf to the customer following a conversation allowing more targeted follow-ups from user and CSR interactions. |
| User Engagement Data | <p>Periodic data exports are provided to collect customer engagement data. Export files are picked up or transferred via SFTP. Data extracts include:</p> <ul style="list-style-type: none"> User Action Extract - provides details on user interactions with the portal, including Recommendations and Actions taken, profile updates, and Self-Audit Report downloads. This file is produced on a weekly basis and will contain a record for users who logged in and changed or updated their profile since the last extract was generated (i.e., the delta). Site Audit Extract - includes details on business and site details provided by users. This file is produced on a weekly basis and will contain a record for those users who logged in and changed or updated their profile since the last extract was generated (i.e., the delta). |

Platform Functionality

| Feature | Definition |
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| Technology Integration | <p>FirstFuel supports Security Assertion Markup Language (SAML) 2.0 to implement Single Sign On (SSO) for end-users and utility personnel (e.g., CSRs).</p> <p>➤ Note: CSR SSO is not included with FirstFuel's standard Implementation Service.</p> <p>Customer-facing Web Portal is white labeled and branded with Utility branding. It may be integrated so that users can navigate between utility-hosted and FirstFuel-hosted content.</p> <p>Utility website's header and footer can be replicated on the Portal. Certain limitations apply.</p> |
| Configurable CMS | Customer-facing Web Portal is equipped with a configurable Content Management System (CMS). Content within the Portal, including images, text, and links displayed in banner ads, may be configured prior to implementation by FirstFuel. |

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| Responsive Design/Browsers | Customer-facing Web Portal adheres to responsive design principles and supports the current major release, plus the previous major release, for Internet Explorer, Firefox, Chrome, and Safari browsers. |
| Analytics Integration | Web Portal supports integration with Google Tag Manager and Tealium. |

Definitions

Customer Account: Small Medium Business or Large Commercial or Industrial customer of the utility. This cannot be a residential customer. A Customer is identified by the customer_id field in the *Non Res Billing Interval Specification*. Customer_id may map to the utility billing account. Emails defined in this document are sent per Customer Account.

Demand: Energy consumed at a period in time, typically measured in kW, therms/day.

Primary Activity: A classification of building occupancy, referring to the type of Site/building and activity occurring within the Site.

Recommendations: An energy conservation measure that is particularly suitable for a Site, based on that Site's energy usage history and Site Profile information.

Service Account: A contract between a customer and a utility to receive a particular service at a specific Service Delivery Point.

Service Delivery Point (SDP): A fixed point at a Site or building where a meter is installed and energy is delivered. SDP Identifier is a key attribute and should never change regardless of if the meter or customer changes. An SDP can be de-energized, but is never removed unless the site/building is destroyed. One or more SDPs may belong to a single site/building.

Site Profile: A collection of information about each Site, which characterizes the Site's Primary Activity, size, operating hours, and other useful information about the Site's construction or operations.

Site: A physical building, facility, or premises at a location. Details about the Site (size, occupancy etc.) are captured in a Site Profile. Site may also be referred to as a building, location, or premise. Site is defined by a collection of Service Accounts located at the same physical address.

Usage: Energy consumed over time, typically measured in kWh, therms, CCF, etc.

Utility Program: A product or service that the Utility provides to their Customer; e.g. an Energy Efficiency Rebate Program.

Utility: An organization that purchases FirstEngage from FirstFuel.

Web User: An individual with an online utility account. The web user may have one or more customer billing accounts ("Customer Accounts") linked to their utility online account. With respect to the features specified in this document, a Web User may have many customer accounts, and hence may receive multiple emails.