

TASK ORDER No. SESBWP01

Date: March 1, 2017

Project Description: Customer Web Portal

Participating SCPPA Member: Burbank Water and Power

Contractor: Smart Energy Systems (SES)

SCPPA Contract No.: 20180303SES

Contractor, SCPPA and the participating SCPPA Member ("Participant") identified above agree that Contractor shall provide the Services specified herein pursuant to the terms and conditions of the Master Professional Services Agreement ("Agreement") between SCPPA and Contractor dated March 4, 2015, except as specifically modified herein.

Scope of Services

Introduction/Background

Burbank Water & Power (BWP) seeks to deploy a comprehensive customer engagement portal and mobile solution to provide its customers greater control over their utility account, and continue to offer programs and services that increase customer satisfaction. Also a key objective of the project is to implement a single platform to cover all water, power and billing interactions of the utility and its customers along with enhancing savings using various efficiency programs. In order to meet these objectives, BWP has chosen the Smart Customer Mobile (SCM®) web and mobile solution from Smart Energy Systems (SES). SCM® will provide a seamless web and mobile customer engagement solution so that customers can manage all interactions with BWP into one single view, while reducing cost and complexity of customer service operations for the Utility.

In Scope

This SOW establishes the scope and requirements for the complete implementation of the SCM® software platform version 6.6.2 to provide BWP with a complete customer web and mobile platform.

The complete list of requirements within the scope of this SOW is attached in Appendix B.

1. Product Scope

The product scope of the project includes the implementation of the following components of SCM®:

- 1- *SCM® Customer Portal and Mobile* – Customer-facing web portal and mobile apps for Apple iOS and Google Android
- 2- *SCM® Customer Service Portal & Smart iQ Analytics* – Utility-facing Customer Engagement Analytics, Smart iQ Analytics, and Admin Portal for BWP staff
- 3- *BWP was presented with the following additions to scope during the initial and final SES customer portal presentation.- Outages, compare, electric vehicle, conservation analytics and revenue opportunities.*

SCM® Customer Portal and Mobile

The scope of the project shall include the implementation of the following customer-facing modules and capabilities of the SCM® solution:

1. My Account
2. Usage
3. Billing
4. Notifications
5. Connect Me
6. Service

- 7. Efficiency
- 8. Outage
- 9. Compare

The table below describes the specific features in scope to meet BWP requirements

#	Proposed Modules	In Scope Functions
1.	My Account	<p>The “My Account” module allows the utility customer to manage their profile, communication preferences, and contact information in the web portal and the mobile app. The customers can see all their accounts in a single sign-on view and set preferences for each account. Specifically, the customers can:</p> <ul style="list-style-type: none"> • View and manage their account information including contact details • Set-up notification preferences by selecting the notification type and delivery channels including SMS text, IVR dialer, email, and mobile push alerts with the ability to add, delete, and update the contact information for each notification type and channel. • Opt in/Opt out of notifications events and configure preferred time slot and frequency for these notifications • Manage E- Billing/Paperless Billing preferences • Manage language preferences to view information in English or Spanish
2.	Usage	<p>The Usage module provides the utility customer the visibility to their energy and water usage and spending using chart displays for different periods. Specifically, the BWP customers can:</p> <ul style="list-style-type: none"> • View electric and water meter data – monthly, seasonal, daily, and 15 minute or one hour intervals for up to last 13 months. • Access historical usage and spending for all service accounts associated with the user. • View consolidated as well as separate representation of their consumption across all meters associated with their service accounts. • View energy consumption in kWh and water consumption in HCF, CF, or Gallons. • View projected energy and water usage for next period • View projected next bill amount (for residential customers on standard rates) • View solar generation data as net metered usage and separate generation chart, and forecasted generated for next 10 days • For Large Commercial/ Industrial customers - view Power/Load Factor, Aggregation across multiple meters and accounts, TOU display across appropriate buckets, and side by side comparison (KVA vs. Power Factor) • Display peak usage (kwh, kva; date and time) during a specified time period, totalized meters, detail for each of the sub-meters and virtual meters, appropriate TOU (Time of Use) buckets • Download usage data Excel, CSV, and PDF
3.	Billing	<p>The Billing module allows the utility customer to manage billing and payments functions online. Specifically, the BWP customers can:</p> <ul style="list-style-type: none"> • View current balance and bill details including all services and accounts covered in the customer’s bill consistent with the billing configuration of the BWP CIS system • Make one-time payment or setup scheduled payments using ACH, credit card, and bank debit card. • Store bank details/payment card details in SCM® account for recurring

#	Proposed Modules	In Scope Functions
		<p>(automatic) payments and set preferred date of payment</p> <ul style="list-style-type: none"> View their account history including bills posted, late notices, and payments made on their account for last 5 years Download copy of their historical bills in PDF format for up to 5 years Enroll in “Budget My Bill” feature to setup target bill amount and receive high bill alerts (for residential customers on standard rates)
4.	Notification	<p>The Notifications module provides a central view of all notifications exchanged between the customer and the BWP. Specifically, the BWP customers will be able to:</p> <ul style="list-style-type: none"> View all notifications, alerts received from BWP Select and respond to a notification View responses to the notifications sent by the customer to BWP <p>The notification/alert types will include:</p> <ul style="list-style-type: none"> Updates to contact information Status updates to customers and utility employees Updates to notification preferences – Opt-in and Opt-out Disconnection warnings Urgent payment request notification Alert for payment arrangement missed Bill generation for current cycle Alerts for due date and amount due Acknowledgment for successful payment Late payment notification Water leakage alert based on configurable flow rate Pricing alert (based on peak, mid peak, off peak hours) Usage alerts based on configurable slabs, set budget New Outage Planned Outage Outage ETR Updates (power restoration alerts) New Bill on account New Letter or Notice on Account Ad hoc messages to selected customers
5.	Connect Me	<p>The Connect Me module provides a single click option for the customer to contact BWP customer service via the mobile app, text message, phone, and email. Specifically, the customers will be able to:</p> <ul style="list-style-type: none"> View all BWP customer service contact options based on request type on the Mobile app and within the portal. Send a message to the BWP customer service desk and receive responses. View all of the BWP’s social media accounts (on Twitter, Facebook, Google+, Instagram, and YouTube) for updates in one view within the portal and the mobile app.
6.	Efficiency	<p>The Efficiency module displays the utility energy efficiency and water conservation programs, rebates and savings tips with ability for the customer to easily view and enroll these programs using any device (desktop, tablet, smartphone). Specifically, the BWP customers will be able to:</p> <ul style="list-style-type: none"> View energy efficiency and water conservation programs and rebates available View personalized savings tips based on service (electric / water), and customer class (residential/C&I)

#	Proposed Modules	In Scope Functions
7.	Service	<ul style="list-style-type: none"> • Apply for a rebate by completing and submitting an electronic form • Track application status for submitted applications • View home energy and water report (updated monthly) <p>The Service module enable Utility customers to enter and log customer service requests, including move in, move –out, service transfer etc. Customers can schedule the date and time for the service requests to be executed. Specifically, the BWP customers will be able to:</p> <ul style="list-style-type: none"> • Request Account service order history for the prior 13 months • Request enrollment in a budget plan • Request for payment extension as per eligibility • Request for turn-on & turn-off utility services for desired service address • Request for service transfer from existing premises to new premises • Request for change in bank details/ payment card for automatic payment processing • Request BWP for residency/ service letter for personal purposes • Request a letter for good credit history • Register complaint for street light outage, illegal watering

Customer Service Portal (Utility-facing Portal) and Smart iQ Analytics

The scope of the Project will include the following utility facing modules.

1. Customer Service Portal
 - a. Dashboard
 - b. Customer Engagement Analytics
 - c. Notification
 - d. CSR Workbench
 - e. Administration
2. Smart iQ Analytics
 - a. Program Management
 - b. Violation Management
 - c. Conservation Analytics
 - d. Revenue Opportunities

#	Proposed Modules	In Scope Functions
<i>Customer Service Portal</i>		
1.	Dashboard	<p>This module provides visual dashboards that display the key KPIs across different customer interactions and customer engagement functions. The configurable dashboards can be set up to view the summarized information of the high level processes in scope based on the selected SCM® modules. Specifically, BWP personnel will be able to view the process KPIs and metrics for bills and payments done, usage trends, notifications sent and received, analysis of various rebate program participation, customer behavior and customer enrolment.</p>
2.	Customer Engagement Analytics	<p>This module provides reports and live dashboards for customer interactions. The BWP personnel will be able to view reports for tracking customer activity, notification status by channel, customer browsing activity metrics, and administrative reports for daily, monthly, or date range activity for billing, usage, notification, rebate enrollment and preference management activity. Specifically, the analytics views will include:</p> <ul style="list-style-type: none"> • Customer registration status

#	Proposed Modules	In Scope Functions
		<ul style="list-style-type: none"> • Notification workflow status by channel • Customer service response metrics for Billing, usage, Connect Me, Inbound messages and rebate applications • Customer behavior metrics including login and feature clicks by browser, device, and time • Marketing banner click metrics
3.	Notification	<p>This module provides a central view of all customer notifications for the Utility customer service team. The BWP personnel will be able to:</p> <ul style="list-style-type: none"> • View all incoming notifications and respond to the customer. • Send Ad hoc notifications including push notification, text message, email, and IVR phone call to one customer or a group of customers. • Track status of all incoming and outbound notifications by message type. • Receive and send attachments with communications.
4.	Administration	<p>The module provides the ability to configure the application features, user roles, and user accounts. Specifically, BWP personnel will be able to:</p> <ul style="list-style-type: none"> • Create and manage user roles for the application including granting and revoking access to specific features. • Create and manage utility user accounts including role assignments. • Manage application configurations including <ul style="list-style-type: none"> ○ Enable or disable features in scope of the modules selected. ○ Label, display content, and disclaimers ○ Workflow configurations • Create and manage multi-channel templates for customer journeys in scope.
5.	CSR – Work Bench	<p>This module provides a 360-degree view of the customer profile for the utility Customer Service Reps (CSR). Specifically, BWP CSRs will be able to lookup a customers and view:</p> <ul style="list-style-type: none"> • All service accounts for the customer • Contact information and last login status • Notification opt in status and corresponding contact details • All incoming and outbound notifications for that customer
Smart iQ Analytics		
6.	Program Management	<p>This module streamlines the entire rebate application process including the following:</p> <ul style="list-style-type: none"> • Receipt and approval of customer information for rebate applications. • Statistics of various rebate programs including rebates approved, types and other configurable criteria • Provide reports on savings (energy and water) that have been achieved based on customer rebate participation at both the customer level and customer segmentation (commercial, single-family residential, multi-family residential) level that can be submitted to satisfy regulatory requirements
7.	Violation Management	<p>This module provides the ability to track watering schedule violations for different customer sets based on configurable criteria.</p>

Scope of Integration Services

Project organization

Working with BWP, SES seeks to establish a strong organizational structure with clear roles and open lines of communication. We recommend an organization centered on the following key elements: Executive Sponsor(s), BWP Project Manager and Core Teams, both Functional and Technical.

Roles

The **Executive Sponsor** is an individual responsible for making policy decisions. They meet on a regular basis with Project Management to review the progress of the implementation and to ensure that any policy decisions which affect the progress of the project are resolved in a timely manner.

The **BWP Project Manager** is responsible for overseeing BWP's activities and deliverables as described in this SOW, as well as management of any third-party resources hired by BWP to provide services within this SOW. The BWP Project Manager will maintain communication between the parties, manage BWP team members, and coordinate BWP activities with the SES Project Manager. The BWP Project Manager will ensure that the Project Workshops are properly staffed, with ongoing monitoring of their progress.

The **SES Project Manager** is responsible for the management of SES' Project activities and deliverables as described in this SOW, as well as management of any third-party resources hired by SES to provide services within this SOW. The SES Project Manager will also coordinate with the BWP Project Manager in management of the BWP activities, tasks and responsibilities that are outlined in this SOW.

The **BWP Core Team** is a cross-section of individuals who can represent the core BWP business and technical functions and processes across the enterprise. The BWP Core Team is empowered to identify and implement industry best practices for SCM® subject to organizational constraints. The Core Team's knowledge of the business and technical functions and processes is expected to be augmented by part-time Subject Matter Experts (SMEs). The size of the Core Team and number of SMEs that are needed will be dependent on how well the business and technical processes are understood and can be adequately represented by the team.

The **SES Core Team** is a cross-section of individuals who can have experience of implementing SCM® and can interpret the core BWP business and technical functions and processes into a solution. The SES Core Team is empowered to identify and implement industry best practices for SCM®, subject to BWP constraints. The Core Team's knowledge of SCM® will be augmented by part-time Subject Matter Experts (SMEs) for functional and technical components as required. The size of the Core Team and number of SMEs that are needed will be dependent on how well the business and technical processes are understood and can be adequately translated to a solution component.

Responsibilities

Within the project organization, certain individuals and groups have specific responsibilities, as follows:

BWP Executive Sponsor:

- Supplies the overall project objective.
- Makes policy decisions or recommendations to the project team.
- Establishes priorities for the project.
- Controls project budgets and is responsible for approving change orders.
- Reviews the progress of the project at milestone dates and other reporting intervals.
- Provides sign off at each project's milestone.
- Makes procedural decisions as they relate to the changes that are introduced.
- Accepts the system.

SES Project Manager:

- Responsible for the SCM® implementation including all SES activities.
- Controls and manages issues, ensuring said issues raised by individuals are referred to the appropriate group or party for resolution; facilitates rapid, yet thoughtful decision making.
- Oversees the activities of SES staff to ensure they are meeting deliverables and schedules.
- Responsible for acceptance and sign off on project deliverables with SES designated signatory.

BWP Project Manager:

- Responsible for the overall project leadership and BWP implementation activities with strong support provided by the SES Project Manager.
- Controls and manages issues, ensuring said issues raised by individuals are referred to the appropriate group or party for resolution; facilitates rapid, yet thoughtful decision making.
- Oversees the activities of BWP staff to ensure they are meeting deliverables and schedules.
- Responsible for acceptance and sign off on project deliverables with BWP's designated signatory.

SES and BWP Core Team and SMEs:

- Meet regularly during the Analysis Phase to determine how to best use the systems to meet the requirements.
- Determine which features/functions of the applications will be implemented.
- Identify the procedural and policy changes that are needed.
- Suggest alternative approaches to the issues that arise.
- Document issues as they arise.

SES and BWP Technical Core Team and SMEs:

- Procures and supports hardware and networking infrastructure.
- Conducts hardware and networking platform upgrades, testing and maintenance.
- Coordinates with 3rd party vendors for interface designs, modifications and integration considerations
- Assists at cutover consistent with responsibilities defined in this SOW.

Other Requirements

SES will require source system access to the BWP environment through approved access channels, such as VPN or other authentication tools which are standard for BWP. System downtime/maintenance periods will be predefined as part of the production deployment preparation activities. SES will work with BWP to define the pre-planned periods. At this time, SES anticipates semi-monthly maintenance windows for pre-planned non-emergency fixes. Critical fix scenarios or security patching will be planned with as much advance notice being provided as possible.

BWP responsibilities under this SOW also include the following:

- Participate in fit gap workshops and ensuring BWP's subject matter experts are present to define the configuration.
- Define the BWP data model for data exchanges, utilizing SES supplied information.
- Review and provide timely feedback on Requirements Documents.
- Provide personnel with the appropriate domain expertise so they may supply information requested by SES during the various project phases to support the SCM@ Solution Requirements Documents development. This information would typically include but may not be limited to; description and review of current and future business processes, data flow diagrams, data definitions, regulatory compliance practices and procedures, work flow process diagrams.
- Conduct architectural review of the proposed solution.
- Signoff on Requirements Documentation and Project Schedule.
- Develop and complete all interfaces, for which BWP is responsible, as defined in the documentation.
- Provide specific classifications and directives for proposed outbound customer message content per TCPA requirements.
- Provide TCPA "opt-in" / "opt-out" architecture preferences.
- Provide appropriate access to the non-production environments (remote and in person).
- Meet with SES to understand the SCM@ test objectives and requirements.
- Develop a UAT Test Plan and Strategy using baseline plan provided by SES
- Provide necessary resources to meet testing schedule.
- Support the SES team during the various project phases including Planning, Analysis, Design, Integration, System Testing, Quality Assurance, and Performance testing.
- Review and enhance baseline UAT test cases based on the test cases provided by Smart Energy Systems.
- Document, with weekly reports and daily defect tracking, the UAT progress and completion.

- Provide final testing and acceptance of software, software customizations, configurations, and interfaces delivered.
- Signoff on the acceptance certificate upon successful completion of all phases of the Smart Energy Systems testing.
- Signoff on UAT acceptance certificate upon successful completion of Acceptance Criteria.
- Jointly lead the planning and documenting of the Cut Over and Release to Operations Plan in the Deployment Plan.
- Jointly lead mock Cut Over and Release to Operations conversion runs with direct involvement in the activities.
- Provide the necessary resources to meet the SCM® Solution Cut Over and Release to Operations schedule.
- Jointly Lead execution of the Cut Over and Release to Operations Plan.
- Signoff on acceptance certificate following successful execution of the Cut Over and Release to Operations Plan.

Project Reporting

To maintain project control, SES provides several reporting forms so that all changes, decisions, or issues are properly recorded and tracked.

Communication Documents Standards

Issues, Risks and Action Items are identified throughout the implementation process to track all areas of concern raised by BWP or SES. The SES and BWP Project Managers will review them on a weekly basis. The documented issues, risks and actions, as well as reports at the end of each project phase, will summarize all these items and their resolution or status.

The items are maintained by both companies throughout the project for anything that requires some sort of action or resolution. The format for capturing these items is agreed to by both companies at the start of the project. These items are used throughout the project as the tracking mechanism for all items that require resolution. This includes not only software or enhancement issues but also scheduling issues, policy/procedure items and any other activity or decision that will affect completion of the project. All the issues raised will not be resolved at any given time. However, they provide a mechanism to ensure that any items outstanding at the end of any phase or at the end of the project have been assigned to someone for follow up.

SCM® IMPLEMENTATION

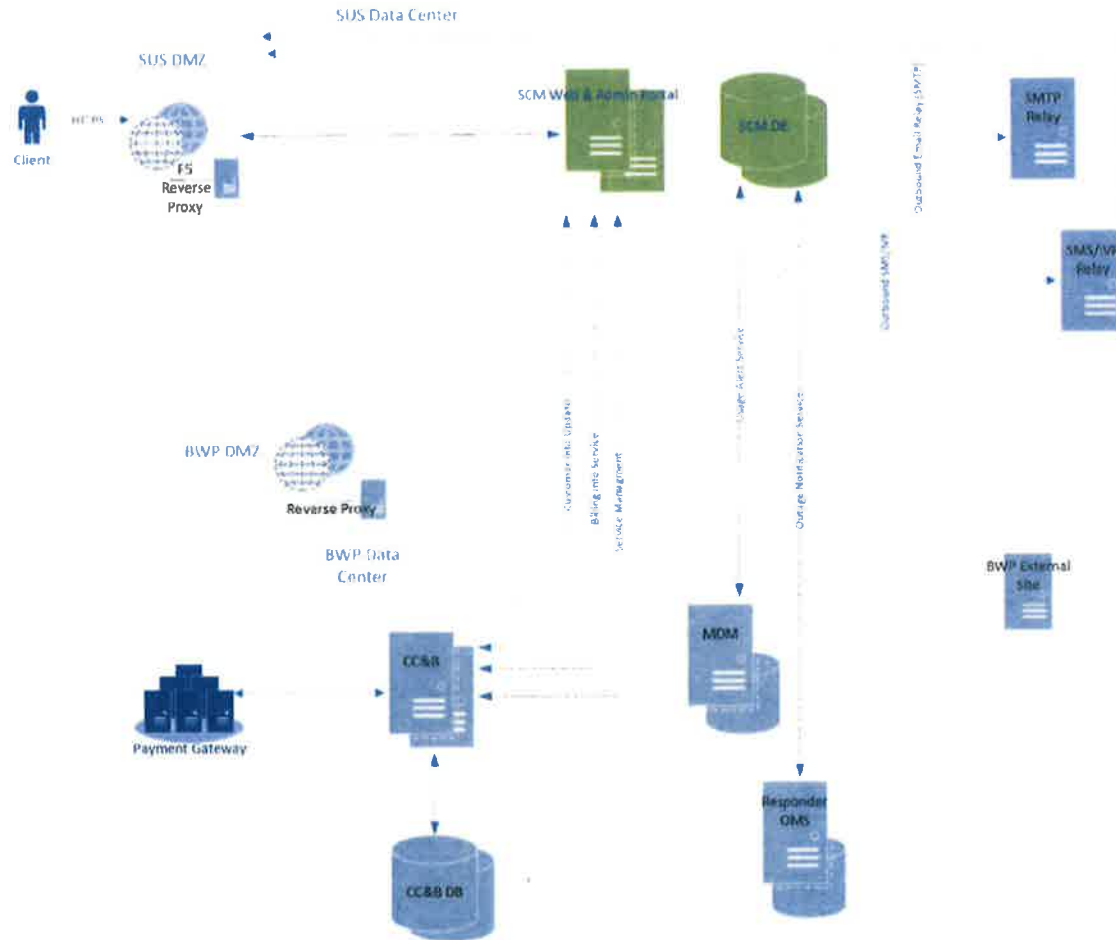
Project Objective

The primary objective of this project is to provide BWP with implementation services to accommodate the timely and cost effective implementation of the SES SCM® suite of products in accordance with the Business Requirements in Appendix B. The project will use SES' SCM® implementation experience as a foundation for establishing best practice business processes and minimizing product extensions. A guiding project principle will be to minimize product extensions, rely upon product configuration and, to the greatest extent possible, modify BWP's business processes to align with best practices inherent in the product workflow. The scope of the implementation services is documented in detail in this section. In summary, the objectives are as follows:

- Meet the requirements documented in the Customer Portal RFP per the responses submitted by SES in their response. The complete list of requirements and responses is in Appendix B.
- Design, configure, test and setup of SCM® 6.6.2 per the requirements document in Appendix B. This was submitted as part of the RFP response from SES.
- Integration with Oracle CCB (2.4.0.2, 2.5 and greater), Telvent Responder OMS (Outage Management System) version 10.0.2 or later, SES SCM 6.6.2 or later, and Itron Savesource headend system consistent with mutually approved design and documented in Appendix B
- Load historical customer bills and usage data for up to 5 years for all BWP customers in SES cloud.
- Deploy BWP branded SCM® web portal functionality in scope integrated within the customer single sign on with SAML 2.0.

- Deploy native mobile apps for Apple iOS and Android devices.
- Satisfy the DOE reporting requirements currently satisfied by oPower. This will enable oPower to be discontinued which is a major benefit of the SES project.

BWP agrees to ensure integration access with the BWP systems identified in this document and the diagram below prior to the completion of the planning phase. The diagram below shows the integration assumptions based on the preliminary discussions between BWP and SES and will be finalized during the Planning /Design phase of the project. Integration to BWP source systems and data is dependent on access to said systems, including any API allowances as applicable.



Detailed “Statement of Work”

The scope of work to be performed by SES and BWP is described in this Statement of Work. In the tables depicting roles and responsibilities, **R** identifies the party responsible for management and implementation of the work; **P** identifies the party participating and providing assistance. Assistance can include mentoring and knowledge transfer of both skills and information.

SES will provide planning, scheduling, organizing, monitoring, cost control, reporting and management of the individual tasks and subtasks required for SES to perform for project completion. BWP specific tasks and subtasks will be overseen by the BWP Project Manager including planning, scheduling, organizing, monitoring, cost control, reporting, and management thereof. SES will begin to perform the Services described in this Statement of Work at a mutually agreed upon date following the execution of this SOW by both parties and shall complete the Services defined in this SOW per the schedule in Appendix B - Project Schedule, subject to the terms of this SOW, any amendments of this SOW and any approved Change Requests. The detailed description of services that follows is broken down by the following implementation phases:

Phase 1: Product Implementation Planning & Design

Phase 2: Product Configuration

Phase 3: Product Testing

Phase 4: Product Deployment

Phase 5: Product Support

Due to their nature, Project Management, Knowledge Transfer, Training and Technology Support functions are performed over the duration of the project and therefore are listed separately.

Project Management

SES will provide project management services to coordinate and manage the SES activities, tasks and responsibilities under the contract. SES will also coordinate and assist the BWP Project Manager in management of BWP activities, tasks, and responsibilities that are outlined in this SOW. Project Management Services include:

- An Executive Sponsor to monitor the performance and progress of the overall Project. The Executive Sponsor shall be reasonably available as needed.
- A Project Manager responsible for the management of the SES Project activities and deliverables as described in this SOW, as well as management of any third-party resources hired by SES to provide services within this SOW. The Project Manager will also coordinate and assist the BWP Project Manager in management of the BWP activities, tasks, and responsibilities outlined in this SOW.
- A part time project analyst, under the direction of the SES Project Manager assists with Project Management Office duties.
- The Project Manager and Executive Sponsor will also provide overall direction and leadership in conducting the project activities contained in this SOW as it follows the SES product implementation methodology.

BWP will provide the following project management services:

- An Executive Sponsor to monitor the performance and progress of the overall Project. The Executive Sponsor shall be reasonably available as needed.
- A Project Manager responsible for the management of BWP's activities and deliverables as described in this SOW, as well as management of any third-party resources hired by BWP to provide services within this SOW. The BWP Project Manager will maintain communication between the parties, manage BWP team members, coordinate BWP activities with the SES Project Manager, and help on activities as needed to keep the Project on schedule.

Project Reporting

SES will provide weekly and monthly project updates throughout the project. The project reports will be submitted to the Steering Committee for review two days before their meeting. The reports will include:

- Progress to Date, outlining the status of the project including an overall description of the degree to which the project schedules, budgets, and quality targets are being met.
- Work Accomplished since last report, outlining a summary of the tasks completed and activities performed during the reporting period.

- Work planned for the next report, outlining the tasks and activities that are planned during the next period.
- Problems, issues and risks that have been encountered, providing an explanation of problems that may affect the ability of BWP to meet the project schedule, budget, or quality targets. This will include a discussion of the efforts which are recommended or which are being taken to correct the identified situations. Risks will include a mitigation plan.

Roles and Responsibilities

Project Management	SES	BWP
<ul style="list-style-type: none"> • SES Project Management – The SES Project Manager is responsible for the management of the SES Project activities and deliverables as described in this SOW, as well as management of any third-party resources hired by SES to provide services within this SOW. The SES Project Manager will also coordinate and assist the BWP Project Manager in management of BWP activities, tasks and responsibilities that are outlined in this SOW. 	R	P
<ul style="list-style-type: none"> • BWP Project Management - The BWP Project Manager is responsible for the management of BWP's activities and deliverables as described in this SOW, as well as management of any third-party resources hired by BWP to provide services within this SOW. The BWP Project Manager will maintain communication between the parties, manage BWP team members, coordinate BWP activities with the SES Project Manager, and provide assistance on activities as needed to keep the Project on schedule. 	P	R
<ul style="list-style-type: none"> • Project Management Plans - The SES and BWP Project Managers are jointly responsible for their respective roles in the management of the following project management plans: <ul style="list-style-type: none"> • Risk Management • Issue Management • Project Change Request Management • Quality Management • Time (Schedule) Management • Resource Management • Cost Management • Communication Management 	R	R
<ul style="list-style-type: none"> • Project Status & Reporting - The SES Project Manager is responsible for the management of the updated Monthly deliverables below: <ul style="list-style-type: none"> • Project Schedule • Risk Register • Issue Register • Project Dashboard 	R	P
<ul style="list-style-type: none"> • Project Financial Management - Both SES and BWP Project Managers are responsible for the management of the items listed below, as they pertain to their organizations and team members. <ul style="list-style-type: none"> • Invoices and Payment processing • Time capture, Earned Value Management (EVM) and Estimated Time to Complete (ETC) values • Vacation planning 	R	R

Project Management Controls and Tools

The following lists the Project Management Controls and respective tools that will be used.

Control	Tool
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Control	Tool
Project Schedule Management	MS Project, Excel. Regular updates and forecasting
Issue Management	Single Issue Register, Weekly reviews
Risk Management	Single Risk Register, Risk Mitigation Plan
Quality Management	Project QA's, Peer review of deliverables
Scope Management	SOW, Contract, Change Request Process
Performance Reporting	Monthly Report to Steering Committee
Resource Management	Weekly status, Staffing Plan
Status Management	Weekly and Monthly Status updates
Documentation Management	SharePoint or Centralized Shared Drive with VPN.

Training and Knowledge Transfer

SES has included training workshops as part of the required by BWP. The training deliverables included in the proposed solution are an embedded Frequently Asked Questions section for the end customer, an embedded Frequently Asked Questions section for the Administrative users, and a job aid for the CSR team. SES will provide a total of 12 hours of training onsite including technical support training and recommended train the trainer format for all functional training.

- **Technical Support Training** – Majority of technical support comes as part of our standard maintenance and product support offering. For system administration, SES will conduct System Admin training in a small classroom setting for those identified as the system administrators.
- **Train the Trainer** – This training is conducted on a module by module walk through basis with scenario based events to enable the trainers to be prepared for any training question which may arise. Course materials, trainer materials, and job aids are all provided by SES.
- **End User Training** – SES recommends providing either job aids, cheat sheets, or online help as an option for end user training rather than field training of your end customers. Customer specific training can be expensive and time consuming, whereas our product is simple to learn and use of this type of training is often not needed. As an advanced training option we offer video user guides which are approximately 30-60 seconds videos on how to perform certain functions in case a user is facing a challenge, such as understanding their bill.

Technical Support

SES will provide full time technical support for the project and is responsible for all SCM® related technical components as the solution is hosted. BWP will manage desktops, network environment and access to the SCM® application. SES Technical Support includes all SCM® IT functions related to the project implementation which includes but is not limited to activities such as setting up and supporting the environments, execution of batch schedules and data load procedures into the SCM application, execution and support of client side conversion activities during dress rehearsals and go-live, housekeeping activities for the file systems used by SCM®, documentation of operations policies and procedures, technical architecture, including interfaces for data extracts and plug-ins. These services to be delivered throughout all the Phases defined in this SOW including the Post-Go-Live Support Phase and includes a structured handover of these procedures/responsibilities to BWP staff. This handover is to be concluded before the end of Post-Go-Live Support.

Support is limited to SCM® technical environments hosting the SCM® application. Any existing BWP environments will continue to be supported by BWP. BWP Technical Staff will provide support to the SES

Technical Staff on BWP technical and operational guidelines and practices. Any technologies that are shared across the BWP IT infrastructure (and therefore other enterprise applications) will be BWP's responsibility to support.

BWP agrees to grant the levels of access and security appropriate to the responsibilities as described above.

Conversion

The SES team will migrate existing Customer data from the source systems, as needed, to the SCM@ platform. The SES team will work with the BWP team to identify and catalog the data for migration and agree upon a migration strategy. Upon completing the strategy for data conversion and migration, SES shall be responsible for taking the data in the source format and translate and convert to the SCM@ platform. SES will be responsible for defining the data needed to be extracted (from now on defined as converted or migrated data) from source systems to SCM@, with BWP providing assistance. The content of the data extract will be finalized during the Execution Phase of the project and documented in the Conversion Plan document and requirements traceability matrix.

SES will work with BWP to design, build, and test the data conversions/extracts from the source systems to SCM. SES and BWP will work together to validate the migrated data; any data cleansing is the responsibility of BWP.

Reconciliation reports will be created to monitor accurate conversion of SCM@ objects. The objects in scope will be documented in the Conversion Plan document. Reports will also need to be created to identify records that must be corrected in the legacy system prior to conversion (Data Cleansing).

Conversion Assumptions:

1	SES is experienced with the SCM@ data structure and will be responsible for: Data Mapping, Transformation, and specification documents. SES and BWP will cooperatively produce draft specifications.
3	SES shall design any transformation routines required to change, aggregate, separate, modify, or convert data to create any required default values. SES will load data into the SCM@ conversion staging schema.
4	In accordance with the Conversion Plan for each Conversion test, BWP will review and verify a statistical sampling of converted data following conversion of a subset and full set of data, as well as balancing reports and totals provided by SES as part of the conversion testing process.
5	BWP is responsible for any manual conversion of data that may be required for unique situations that cannot be converted electronically. SES will provide assistance as requested.
6	Only data for which there are existing data elements in SCM@ can be converted. SES will, wherever feasible, make use of characteristics and other user defined data elements available in SCM@ to hold BWP data that does not convert directly to base data elements.
8	BWP is responsible for manual data cleanup and any data conversion that cannot be automated.
9	The conversion tool, or conversion processes will provide exception reports from data load testing.
10	BWP and SES will work together to define a set of conversion controls during the development of the Conversion Plan. SES is responsible for data reconciliation between SCM@ and the extracted data from the source systems.
11	SES and BWP will conduct at least three (3) Mock Conversions of full production data to test the conversion process itself and clarify the integrity of the data conversion. BWP will review the results of the Mock Conversions and provide feedback and approval.

Assumptions

The following assumptions have been made:

1. BWP will provide timely responses to SES information needs and timely review of project documents provided. It is suggested that 3 business days be set for responses to requests by both SES and BWP. Project document reviews will also be completed in no more than 3 business days.
2. Key personnel at BWP will be made available to SES as required during the project, specifically for participation in fit gap workshops and requirements finalization during Phase 1, and for User Acceptance Testing activities during Phase 3.
3. BWP will provide onsite workspace for SES resources with internet connectivity as necessary.
4. All documents will be jointly reviewed with BWP staff and approved by BPW where necessary.

5. BWP fully acknowledges and understands that any customization to standard features and functionality, not defined in requirements in Appendix B, will be assessed by SES and may impact approved budget and/or schedule. BWP will have discretion to determine whether to proceed with such customizations using the agreed change request process
6. Integration to BWP source systems and data is dependent on access to said systems, including API allowances, as applicable. SES will work on behalf of BWP to obtain such APIs within reason, however BWP is ultimately responsible for ensuring that such access and API allowances are provided. In addition, existing API or SFTP processes for BWP source system data, including customer and usage data, will be made available for use or re-use as part of the project.
7. Standard SES implementation and configuration is conducted primarily from SES offices with any included on-site activities to be determined and documented during Planning Phase. Additional SES resources beyond those so identified will travel to BWP offices on an as-requested basis if and when practicable.
8. SES assumes all payments user interfaces will be maintained within the SES solution with secured web services to transmit payment details either to BWP or to a third party payment processor. BWP is responsible for all integrations between source systems (Oracle CC&B) and any third party payment processor other than SES payment service.
9. Independent validation of energy and water savings will be conducted by a third party auditor approved by BWP.
10. For Customer Data migration, BWP shall be responsible for extraction and cleaning and SES shall be responsible for transforming and loading.

Work Requirements

The section below summarizes the key phases of the project and scope of activities. **R** means the responsible party and **P** means the party that participates.

<i>Phase 1 – Product Implementation Planning & Design</i>	<i>SES</i>	<i>BWP</i>
• Project Kick Off Meeting – Initial kick off meeting to identify key stakeholders, establish program governance, and agree preliminary project schedule and scope. This is owned and delivered by SES with BPW making the necessary resources and facilities available.	R	P
• Project Orientation Training – Initial overview of the SCM® product to support the Fit Gap workshops and requirement gathering. Also, supports configuration and Integration.	R	P
• Product Installation – Installation of SCM® in hosted environment for use by the project.	R	
• Coordinate workshop schedule and agenda with SES – BWP and SES will jointly review and coordinate the Fit Gap workshop and agenda.	R	R
• Fit Gap Workshops - Fit Gap workshops are specifically designed workshops to review all RFP requirements (Appendix B), business processes, BWP specific business rules and validations, as well as the user and customer experience to align the SCM® solution to the final desired solution.	R	P
• Source Data Workshops – Source data workshops are designed to review the source data systems and align them with the SCM needs and requirements. The output from the workshops will be the same as the Fit Gap workshops and include requirements, mapping documents, validations and any data transformation requirements.	R	R
• Requirements Sign Off/Finalization - Requirement sign off and finalization is the requirement review and approval activity which is key to solidifying the scope of work and providing a check point for the project team to validate the scope of work. The deliverable for this is the Document of Understanding and contains a requirements traceability matrix.	R	R
• Project Plan and Schedule Baseline - Project plan and schedule baseline is intended to be a review cycle for the project leadership team members to validate all scope items and schedule considerations are accounted for before commencing the next phase of the project. This includes a detailed resource forecast.	R	R

Phase 2 – Product Configuration		
• Configure / Integration - Product configuration and source system integration per business requirements defined in the Project Planning/Design phase and agreed in the document of understanding.	R	P
• Detailed Design/Development of Source Data Extracts – BWP will design, develop and Unit Test the BWP side of the source data extracts as agreed to in the previous phase.	P	R
• Detailed Design/Development of Source Data Loads – SES will design, develop and Unit Test the SCM load side of the source data extracts as agreed to in the previous phase.	R	P
• Data cleansing – BWP will be responsible for any manual data cleansing in the source systems.	P	R
• Unit Testing - SCM® product unit testing to ensure configuration changes are per the approved business requirements. Unit testing is done by SES.	R	
• Environment Validation - Environment validation of integration points and environment deployment to ensure all integrations and systems are available for testing.	R	R
• Scalability Validation - Scalability and performance focused testing within SES environment to validate the SCM® solution shall meet the projected volume. We need to specify what the scalability and performance metrics are?	R	P
Phase 3 – Product Testing		
• System/Quality Assurance Testing - Quality assurance testing of all defined business requirements and the designed solution to ensure end to end functionality is working as desired.	R	P
• SES Acceptance Testing - SES acceptance testing is focused on end user experience and is owned by SES but jointly executed by BWP and SES.	R	P
• User Acceptance Testing – BWP User Acceptance Testing to test the end to end solution from BWP’s customers and BWP perspective. This is executed by BPW and supported by SES.	P	R
• User Training - User training for BWP Customer Service and internal team members on the Customer Service solution and how to best support BWP Customers with the tool. Some of this will happen before UAT so that the testers are prepared to execute UAT.	R	P
• Deployment Plan – Develop detailed deployment and cutover plan. Owned by SES and reviewed with BWP.	R	P
Phase 4 – Product Deployment		
• Product Deployment - Deployment of SCM® and any necessary source system changes into the production environment.	R	P
• Knowledge Transfer - Knowledge transfer of configurations required in BWP systems and documentation review of changes with BWP support team.	R	P
• SES Production Verification - Production environment validation of all functionality after product deployment to ensure the product was deployed successfully.	R	
• BWP Production Verification – BWP production verification of all functionality after product deployment to ensure the product was deployed successfully.	P	R
• Post Go Live Stabilization – 90 days of production stabilization support prior to the BWP migrating to support plan consistent with the <i>SES Standard Maintenance and Customer Service Agreement</i> .	R	P
Phase 5 – Product Support		
• Ongoing Product Support - Support any production environment tickets raised per agreed to service levels.	R	P
• Patching and OS Support - Support security patches from Operating System providers, browser versions, and new mobile OS version releases.	R	P
• Support New Feature Releases - As new features are managed through the release management process by the SCM® Client success team.	R	P

Project Deliverables

The following deliverables are planned for the project by SES.

#	SES Deliverable Name	Description
Phase 1 – Product Implementation Planning & Design		
1	Project Plan	The project plan including updated schedule in a detailed MS Project file intended to properly manage the schedule per plan including all tasks required to successfully complete the project as well as dependencies and resource accountable.
2	Document of Understanding	The DOU is the equivalent of a business requirements document in combination with SCM® process flows. The DOU will incorporate all BWP specific business requirements, business processes, and customization requirement to meet the current scope of the project and define any change request.
3	Conceptual Solution Architecture	The conceptual solution architecture diagram will provide a visual representation of various systems and integration points required to fulfil the objective of the project.
4	Project Kick Off Materials	This document will contain the foundational elements of the project and the content that was discussed during the kick off meeting.
5	SCM Orientation Training	BWP confirms Orientation Training was completed satisfactorily and approves the deliverable
6	Fit Gap Workshops	BWP confirms Functional Workshops were completed satisfactorily.
Phase 2 & 3 – Product Configuration & Testing		
7	User Acceptance Testing Scripts	Test scripts supporting each specific functionality and business requirement for BWP to utilize during UAT.
8	Source Data Extracts	The source data has been extracted from the source systems and loaded in to SCM®.
9	Configured System	SCM® has been configured, all configurations have been updated in the DOU.
10	End User Training Materials	The end user training materials have been developed and approved by BWP.
11	Knowledge Transfer Plan	The KT plan has been developed and approved by BWP and SES.
12	System/QA Testing	System/QA Testing has been completed and testing artefacts have been approved by SES and BWP.
13	SES Acceptance Testing	SES Acceptance Testing has been completed and testing artefacts have been approved by SES and BWP.
14	UAT Tester Training	UAT Testers are trained on the solution and business processes in preparation for executing UAT.
15	Performance Testing	Performance Testing has been completed and testing artefacts have been approved by SES and BWP.
16	Product Installation	BWP confirms the SCM® product is installed, access is available and approves the deliverable
17	UAT	System/QA Testing has been completed and testing artefacts have been approved by SES and BWP.
18	Deployment Plan	The deployment plan including Cutover and Release to Operations schedule has been reviewed, table top dry runs have been executed and the plan has been approved by BWP and SES.
Phase 4 – Product Deployment		
19	Deployment Plan	Documented deployment preparation activities and plan to deploy the solution into production including all source system components.
20	Training Workshops	User training for BWP Customer Service and internal team members on the

#	SES Deliverable Name	Description
		Customer Service solution and how to best support BWP Customers with the tool. 12 hours of total sessions.
21	Data Conversion	The final data migration/extract from the source systems is loaded into SCM® production
22	Support	Support and helpdesk processes and procedures are ready and all groups are briefed and trained.
23	Knowledge Transfer	Final KT has happened and BWP are ready to support SCM®.
24	Marketing & Communications	Customers are aware of the change, both internal and external communication has been completed
Phase 5 – Product Support		
25	Post Go-Live Support	Post go-live support has been completed as per the project exit criteria.
26	Production Ticketing Access	Ongoing report of all production tickets created and resolution
27	Performance Tuning	Final performance tuning has been completed if required.
28	Closure	BWP approve the end of the project and a formal project closure takes place.

Acceptance Criteria

SES shall prepare and present the project Deliverables to the BWP approver and the approver shall review the Deliverables within one week. All Deliverables shall be deemed accepted upon the expiry of the review period unless BWP timely notifies SES of its refusal to accept any given Deliverable. Any such BWP notification of non-acceptance shall be accompanied by a detailed report listing the specific acceptance criteria that were not met by the Deliverable as provided. Upon receipt of any such notification and report, SES shall use commercially reasonable efforts to correct all identified deficiencies with 10 business days—at which time the resubmitted Deliverable shall once again be subject to the BWP review period. This process shall continue until the Deliverable is in question accepted by BWP, subject to the issue escalation protocol set forth in the section below, and any other relevant terms as agreed between the parties.

Schedule/Milestones

The below list consists of the initial milestones identified for the Project:

Phase	Expected Duration	Total Expected Hours
Phase 1 – Product Implementation Planning & Design	4 weeks	278
Phase 2 – Product Configure / Customization	12 weeks	346
Phase 3 – Product UAT	4 weeks	268
Phase 4 – Product Deployment	4 weeks	168
Phase 5 – Product Support	Ongoing	Ongoing

Issue Escalation

SES will escalate issues in the following order if they remain unresolved at the previous level:

Level	Unresolved for	Email Id
BWP Project Manager (TBD)	1 Day	TBD
BWP Executive Sponsor (TBD)	5 Days	TBD

BWP will escalate issues in the following order if they remain unresolved at the previous level:

Level	Unresolved for	Email Id
TBD, Project Manager	1 Day	TBD
Travis Parker, Director of Delivery	3 Days	Travis.Parker@Smartusys.com
Ken Roberts, VP of Sales	5 Days	Ken.Roberts@Smartusys.com

Scope Changes

Any changes or modifications to the scope of work defined in this Task Order must be approved in accordance with Change Control Procedures outlined in the governing Master Services Agreement.

Compensation and Schedule

Software Subscription, Implementation, Support, and Maintenance Fees

SCM® Customer Service Mobile/Portal SaaS Cloud Platform Subscription Fee (83,000 Users Included)	Pricing
Annual SaaS Subscription Fee	\$168,490 per year*
Smart iQ™ Analytics (Utility-facing Portal – 75 Utility Users)	Included
Customer Service Portal (Utility-facing Portal – 75 Utility Users)	Included
One-time Implementation Fee	\$94,800 one-time
Total Yr-1 Fee	\$263,290

Travel Related Expenses

Included

- Annual fee is fixed for a five year period. SUS recognizes that each annual commitment is contingent upon approval by the City of Burbank City Council.

Upon completion of implementation, all terms governing Participant's subscription to the SCM® software installed hereunder shall be governed by the terms set out in the Software as a Service Subscription Agreement ("SaaS") attached below as Appendix B and hereby incorporated by this reference. Upon completion of the initial 5-year subscription term or any applicable renewal term, the SaaS shall automatically renew as written for the per year fee listed above for an additional one-year term unless notice is given by either party expressing a desire to the contrary not less than sixty (60) days before the expiry of any such term.

Additional utility customers SCM® user subscriptions can be purchased in 5,000 subscription bundles at \$2.05 per user per year, and Utility user subscriptions can be purchased at \$250 per user per year—all prorated as applicable.

Optional fees for independent annual validation and reporting of Energy and Water savings will range from \$22,500 to \$37,000 based on the scope of services as approved by BWP.

Any changes in work plan or effort beyond the implementation effort (hours) stated in Schedule/Milestones section will be approved by BWP and charged rate of \$150 per individual per work hour.

Post go-live onsite support is estimated (hours) as stated in the Schedule/Milestones section. Additional on-site support resources will be provided at \$65 per individual work hour upon request and approval by BWP.

Payment Processing Service Fees

Payment Processing via Web and Mobile	Convenience Fee
---------------------------------------	-----------------

For Visa, MasterCard, and Discover (Debit & Credit), and American Express Transactions <i>(Paid by the Customer)</i>	\$2.99 per transaction
For eCheck, Checks by Web, and ACH Transactions <i>(Paid by the City)</i>	\$0.10 per transaction
Payment Processing via IVR	Convenience Fee
For Visa, MasterCard, and Discover (Debit & Credit), American Express, eCheck, Checks by Web, and ACH Transactions <i>(Paid by the Customer)</i>	\$2.99 per transaction

SMS Test Messaging and IVR Service Fees

SMS Service Fees (On-going)	Pricing
Short Code Fees:	
Option 1: Random Code <i>(Discounted \$1,700 if paid for the year)</i>	\$1,100 per month \$11,500 per year
Option 2: Vanity Code <i>(Discounted \$1,700 if paid for the year)</i>	\$1,600 per month \$17,500 per year
One-time Setup Fee	\$650
<i>Optional Feature - One time MMS (picture messaging) enablement fee</i>	\$500
Short Code Text Messages (in-bound)	\$0.003 per message
Short Code Text Messages (out-bound)	\$0.008 per message
* 8-12 weeks for carrier approval	
** Short code fees start at the beginning of the approval process	

IVR Service Fees (On-going)	Pricing
Toll-Free Phone Numbers	\$2.15 per month
Toll-Free Phone Numbers Connect (in-bound)	\$0.03 per minute
Toll-Free Phone Numbers Connect (out-bound)	\$0.02 per minute
Programmable Call Recording:	
<i>Optional Feature - Recording</i>	\$0.003 per minute
<i>Optional Feature - Storage</i>	\$0.001 per minute per month
<i>Optional Feature - Transcription</i>	\$0.07 per minute

Location: Standard SES implementation and configuration is conducted primarily from SES offices with any included on-site activities to be determined and documented during Milestone One (Phase One above). Additional SES resources beyond those so identified in the project plan will travel to Customer offices at SES's sole discretion pursuant to the travel policy below if and when practicable at a minimum rate of \$150 per individual per work hour.

Payment Schedule: BWP agrees to make all payments to SES within forty-five (45) calendar days after receipt of invoice. First year SaaS Subscription Fees are due at the time of the Master Service Agreement ("MSA") governing this Task Order's signing, and subsequent SaaS Subscription Fees shall be due upon the anniversary of said signing date thereafter. Payment processing and messaging fees shall be invoiced monthly in arrears. Implementation Fees shall be invoiced as follows:

- Twenty-five percent (25%) upon the signing of the MSA or this Task Order, whichever is sooner.
- Twenty-five percent (25%) upon the completion of Phase 1.
- Thirty percent (30%) upon the completion of Phase 2.
- Twenty percent (20%) upon the completion of Phase 4.

Late Invoices: Any outstanding invoice may incur a late payment fee of 1.5% or the maximum allowable under the law, whichever is less. If BWP account is sixty (60) days or more overdue, SES reserves the right with prior written notice to withhold performance of its obligations under this Agreement, without liability, until such payments are paid in full.

Representative(s) of Participating Member(s)

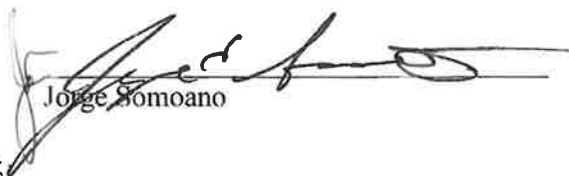
Burbank Water and Power
Teri Kaczmarek
Manager of Customer Service Operations
164 W. Magnolia Blvd
Burbank, CA 91502
(818) 238-3553
TKaczmarek@Burbankca.gov

Amendment(s) to the Agreement

None

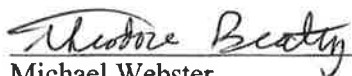
IN WITNESS WHEREOF, the parties have signed this Task Order as of the date first written above.

CITY OF BURBANK WATER AND POWER

By: 
Jorge Somoano


and;

SOUTHERN CALIFORNIA PUBLIC POWER AUTHORITY

By:  Fol
Michael Webster
Executive Director

and;

SMART ENERGY SYSTEMS, LLC

By: 
KEN ROBERTS
Vice President of Sales

Participant's Acknowledgement and Agreement

By signing this Task Order, Participant agrees to reimburse SCPPA for all fees and expenses invoiced by Contractor and will be responsible for all payment obligations incurred by SCPPA in connection with the work performed at the direction of or on behalf of Participant. Participant agrees to hold SCPPA and all other SCPPA members harmless for payment for work performed at the direction of, and for the exclusive benefit of Participant.

BURBANK WATER AND POWER

Check here if Participant has indicated acknowledgement and acceptance by letter addressed to or other legal Agreement with SCPPA.

Appendix A – Software as a Service Subscription Agreement

This Software as a Service Subscription Agreement (this “Agreement”) is entered into as of _____ (the “Effective Date”) by and between Smart Energy Systems, LLC (“Provider”), and Burbank Water and Power (“Customer”).

RECITALS

Provider offers a software application known as SCM® (the “Software”), and the parties have agreed that Provider will make the cloud-hosted Software available for and to Customer and Customer’s customers. Therefore, in consideration of the mutual covenants, terms, and conditions set forth below and in any relevant exhibits or documents, the adequacy of which is hereby acknowledged, the parties agree as follows:

TERMS AND CONDITIONS

1. DEFINITIONS. The following capitalized terms shall have the following meanings whenever used in this Agreement.

- 1.1. “Documentation” means the Software’s standard user manuals and any other accompanying documents related to the Software delivered to Customer during Implementation.
- 1.2. “Implementation” means the process for gathering requirements, configuring, testing, training, and integrating the Software for Customer’s use, as set forth in a Statement of Work.
- 1.3. “Initial Term” means 5 years from the date the Software is made available for use, with such a date otherwise defined and demarked by the completion of Phase 3, Item 3 “User Acceptance Testing” in the above Statement of Work.
- 1.4. “Software” means Provider’s SCM® software, in source code and object code format, and shall include only the modules specified in an applicable Statement of Work or Change Order thereto.
- 1.5. “Specifications” means Provider’s specifications for the Software, as set forth in an applicable Statement of Work.
- 1.6. “Term” means the Initial Term (as defined above) and any applicable renewal term(s).
- 1.7. “Upgrades” is defined in Section 3.1 below.

2. SOFTWARE DELIVERY.

- 2.1. Right to Access and Use Software. Provider hereby grants Customer a nonexclusive right to use and make available the Software to Customer's utility users and/or employees during the Term, subject to Section 2.2 below.
- 2.2. Restrictions on Software Use. This Agreement grants the Customer a limited right to access and use the Software. The Software is not sold, and Customer receives no title to or ownership of any copy or of the Software itself. Furthermore, Customer receives no rights to the Software other than those specifically granted in Section 2.1 above. Without limiting the generality of the foregoing, Customer shall not: (a) modify, create derivative works from, distribute, publicly display, publicly perform, or sub-subscribe the Software; (b) allow third parties to exploit the Software; or (c) reverse engineer, decompile, or attempt to derive any of the Software's source code.

3. UPDATES.

- 3.1. Provision of Updates: Provider shall maintain and update the Software as follows during the Term:
 - (a) Provider will routinely update the Software to address any security updates, bug fixes, or responsiveness matters quarterly or as is required pursuant to Section 3.2 below or otherwise. Provider will update the Software to add any new features or functions, incorporate any improved process changes, and/or implement any performance-enhancing modifications annually, if applicable ("Upgrades").
 - (b) Should an Upgrade be required pursuant to Section 3.2 below, Provider will promptly notify the Customer of any downtime and provide confirmation once functionality is restored pursuant to the terms therein.
 - (c) Each Upgrade will constitute an element of the Software and will be subject to this Agreement's terms regarding Software, including, without limitation, subscription, warranty, and indemnity terms.
- 3.2. Service Levels: Provider shall exercise reasonable efforts to achieve the following service performance targets:
 - (a) Severity Classification
 - (i) Severity 4 – Critical business impact with no alternative
 - (ii) Severity 3 – High business impact with complicated alternative
 - (iii) Severity 2 – Minimal business impact with alternatives

(iv) Severity 1 – Cosmetic Issues or documentation issues

(b) Service performance targets are set against system availability, problem resolution times, and follow up. Performance and reporting against such targets shall be as follows:

(i) <u>System Availability:</u> All hours, not including normal scheduled system maintenance	99.9%
(ii) <u>Problem Resolution Time:</u>	
Severity 4 - within 4 hours	95%
Severity 3 - within 8 normal business hours	90%
Severity 2 - within 40 normal business hours	80%
Severity 1 - within 80 normal business hours	70%
(iii) <u>Follow – Up:</u>	
Severity 4 - hourly update	99%
Severity 3 - daily update	99%
Severity 2 - weekly update	99%
Severity 1 – monthly update	99%

(c) Provider will measure and report on the Service performance targets on a monthly basis. Failure to meet 3.2(b)(i) shall result in a pro-rata credit good towards future amounts due calculated monthly. Failure to meet 3.2(b)(ii – iii) shall result in a 0.1% credit good towards future amounts due for each hour the service levels are not met, calculated monthly.

4. FEES.

4.1. All implementation fees, software subscription fees, and any other applicable fees shall be set out in a relevant Statement of Work.

5. IP & FEEDBACK.

5.1. IP Rights in the Software. Provider retains all right, title, and interest in and to the Documentation and Software, including without limitation Upgrades, except to the extent of the limited subscription rights specifically set forth in Section 2.1 Customer recognizes that the Software and its components are protected by copyright and other laws. Customer shall not (and shall not allow or cause any third party to) reverse engineer, disassemble, alter, or otherwise translate the Software, Documentation, or Upgrades.

5.2. Feedback. Customer hereby grants Provider a perpetual, irrevocable, unrestricted,

worldwide license to use any Feedback (as defined below) Customer communicates to Provider during the Term, without compensation or any obligation to report on such use. Such rights shall include, without limitation, the right to exploit Feedback in any way and the right to grant sublicenses. Notwithstanding the provisions of Article 6 (*Confidential Information*) below, Feedback will not be considered Customer's Confidential Information. ("Feedback" refers to any suggestion or idea for modifying any of Provider's products or services, including all intellectual property rights therein.)

6. CONFIDENTIAL INFORMATION.

- 6.1. Confidential Information Defined. "Confidential Information" refers to the following types of material or content one party to this Agreement ("Discloser") discloses to the other ("Recipient"): (a) any information Discloser marks or designates as "Confidential" at the time of disclosure; and (b) any other nonpublic, sensitive information disclosed by Discloser including, but not limited to code, inventions, know-how, business, technical, and financial information, or other information which should reasonably be known by the Recipient to be confidential at the time it is disclosed, due to the nature of the information and the circumstances surrounding such disclosure. Notwithstanding the foregoing, Confidential Information does not include information that: (i) is in Recipient's possession at the time of disclosure; (ii) is independently developed by Recipient without use of or reference to Confidential Information; (iii) becomes known publicly, before or after disclosure, other than as a result of Recipient's improper action or inaction; or (iv) is rightfully obtained by Recipient from a third party without breach of any confidentiality obligations.
- 6.2. Nondisclosure. Recipient shall not use Confidential Information for any purpose other than to facilitate this Agreement (the "Purpose"). Recipient: (a) shall not disclose Confidential Information to any employee or contractor of Recipient unless such person needs access in order to facilitate the Purpose and executes a nondisclosure agreement with Recipient with terms no less restrictive than those of this Article 6; and (b) shall not disclose Confidential Information to any third party without Discloser's prior written consent. Notwithstanding the foregoing, Recipient shall protect Confidential Information with the same degree of care it uses to protect its own confidential information, but with no less than reasonable care. Recipient shall promptly notify Discloser of any misuse or misappropriation of Confidential Information that comes to Recipient's attention. Notwithstanding the foregoing, Recipient may disclose Confidential Information as required by applicable law or by proper legal or governmental authority. Recipient shall give Discloser prompt notice of any such legal or governmental demand and reasonably cooperate with Discloser in any effort to seek a protective order or otherwise to contest such required disclosure, at Discloser's expense.
- 6.3. Injunction. Recipient agrees that breach of this Article 6 would cause Discloser irreparable injury, for which monetary damages would be inadequate, and in addition to any other remedy, Discloser will be entitled to injunctive relief against such breach or threatened breach, without proving actual damage.

- 6.4. Termination & Return. With respect to each item of Confidential Information, the obligations of Section 6.2 above (*Nondisclosure*) will terminate three (3) years from the expiration of this Agreement. Upon such termination, Recipient shall return all copies (excepting one (1) copy archived for purposes of Recipient's back-up processes) of Confidential Information to Discloser or certify, in writing, the destruction thereof.
- 6.5. Retention of Rights. This Agreement does not transfer ownership of Confidential Information or grant a license or any other right thereto. Discloser will retain all right, title, and interest in and to all Confidential Information.

7. REPRESENTATIONS & WARRANTIES.

7.1. From Provider.

(a) *Re: Function.* Provider represents and warrants that, during the Term, the Software will perform materially in accordance with its Specifications and pursuant to the service level targets in Section 3.2 above.

(b) *Re: IP Rights in the Software.* Subject to the next sentence, Provider represents and warrants that it owns the Software, and has the power and authority to grant the rights in this Agreement without the further consent of any third party. Provider's representations and warranties in the preceding sentence do not apply to the extent that the infringement arises out of any of the conditions listed in Subsections 8.1(a) through 8.1(e) below. In the event of a breach of the warranty in this Subsection 7.1(b), Provider, at its own expense, will promptly take the following actions: (i) secure for Customer the right to continue using the Software; (ii) replace or modify the Software to make it non-infringing, provided such modification or replacement will not materially degrade any functionality listed in the Specifications; or (iii) refund the prorated SaaS subscription Fee paid for the Software for every month remaining in the Term, following the date after which Customer is required to cease use of the Software. In conjunction with Customer's right to terminate for breach where applicable and the provisions of Section 8.1 below (*Indemnified Claims*), the preceding sentence states Provider's sole obligation and liability, and Customer's sole remedy, for breach of the warranty in this Subsection 7.1(b) and for potential or actual infringement by the Software.

7.2. From Both Parties. Each party represents and warrants that it has the full right and authority to enter into, execute, and perform its obligations under this Agreement and that no pending or threatened claim or litigation known to it would have a material adverse impact on its ability to perform as required hereunder.

7.3. Warranty Disclaimers. Except for the express warranties in Sections 7.1 and 7.2 above, PROVIDER MAKES NO WARRANTIES, EITHER EXPRESS OR IMPLIED, INCLUDING WITHOUT

LIMITATION ANY IMPLIED WARRANTY OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE. Provider does not warrant that the Software will perform without error or that it will run without immaterial interruption. Provider provides no warranty regarding, and will have no responsibility for, any claim arising out of: (a) a modification of the Software made by anyone other than Provider, unless Provider approves such modification in writing; or (b) use of the Software in combination with any operating system not authorized or specifically forbidden in the Specifications or Documentation or with hardware or software.

8. INDEMNIFICATION.

- 8.1. Indemnified Claims. Provider shall defend and indemnify Customer and its officers, directors, shareholders, parents, subsidiaries, agents, successors, and assigns against any "Indemnified Claim," meaning any third party claim, suit, or proceeding arising out of, related to, or alleging infringement of any patent, copyright, trade secret, or other intellectual property right by the Software. Provider's obligations set forth in this Section 8.1 do not apply to the extent that an Indemnified Claim arises out of: (a) Customer's breach of this Agreement; (b) revisions to the Software made without Provider's written consent; (c) Customer's failure to incorporate Upgrades that would have avoided the alleged infringement, provided Provider offered such Upgrades without charges not otherwise required pursuant to this Agreement; (d) Provider's modification of Software in compliance with Customer's specifications; (e) unauthorized use of the software by third parties; or (f) use of the Software with hardware or software not provided by or approved of by Provider.
- 8.2. Litigation & Additional Terms. Provider's obligations pursuant to Section 8.1 above will be excused to the extent that Customer's or any of Customer's Associates' failure to provide prompt notice of the Indemnified Claim or reasonably to cooperate materially prejudices the defense. Provider will control the defense of any Indemnified Claim, including appeals, negotiations, and any settlement or compromise thereof; provided Customer will have the right, not to be exercised unreasonably, to reject any settlement or compromise that requires that it admit wrongdoing or liability or subjects it to any ongoing affirmative obligations.

9. LIMITATION OF LIABILITY.

- 9.1. Liability Cap. Provider's liability arising out of or related to this Agreement shall in no event exceed the Subscription Fee paid by Customer within the twelve (12) months preceding the claim.
- 9.2. Exclusion of Consequential Damages. IN NO EVENT WILL PROVIDER BE LIABLE TO CUSTOMER FOR ANY CONSEQUENTIAL, INDIRECT, SPECIAL, INCIDENTAL, OR PUNITIVE DAMAGES ARISING OUT OF OR RELATED TO THIS AGREEMENT.

9.3. Clarifications & Disclaimers. THE LIABILITIES LIMITED BY THIS ARTICLE 9 APPLY REGARDLESS OF THE FORM OF ACTION, WHETHER IN CONTRACT, TORT, STRICT PRODUCT LIABILITY, OR OTHERWISE; EVEN IF PROVIDER IS ADVISED IN ADVANCE OF THE POSSIBILITY OF THE DAMAGES IN QUESTION AND EVEN IF SUCH DAMAGES WERE FORESEEABLE; AND EVEN IF CUSTOMER'S REMEDIES FAIL OF THEIR ESSENTIAL PURPOSE. If applicable law limits the application of the provisions of this Section 9, Provider's liability will be limited to the maximum extent permissible by law. For the avoidance of doubt, Provider's liability limits apply to Provider's affiliates, providers, agents, sponsors, directors, officers, employees, consultants, and other representatives.

9.4. Exceptions to Limitation of Liability. Sections 9.1 (*Liability Cap*) and 9.2 (*Exclusion of Consequential Damages*) above do not apply to: (a) claims pursuant to Article 8 above (*Indemnification*); or (b) claims for attorneys' fees and other litigation costs recoverable by the prevailing party in any action.

10. TERMINATION.

10.1. Termination for Cause. Either party may terminate this Agreement if the other party (a) fails to cure any material breach within thirty (30) days after written notice of such breach; or (b) ceases operation without a successor.

10.2. Effects of Termination. Upon termination of this Agreement, Customer shall cease all use of the Software and delete, destroy, or return all copies of the Documentation in its possession or control. The following provisions will survive termination or expiration of this Agreement: (a) any obligation of Customer to pay fees incurred before termination; (b) Articles and Sections 2.2 (*Restrictions on Software Rights*) 5 (*IP & Feedback*), 6 (*Confidential Information*), 7.3 (*Warranty Disclaimers*), 8 (*Indemnification*), and 9 (*Limitation of Liability*); and (c) any other provision herein that must survive to fulfill its essential purpose.

11. MISCELLANEOUS.

11.1. Independent Contractors. The parties are independent contractors and will so represent themselves in all regards. Neither party is the agent of the other, and neither may make commitments on the other's behalf.

11.2. Taxes. Fees in Section 4.1 above do not include any applicable taxes. Customer shall be solely responsible in the event any authority imposes a duty, tax, levy, or fee (excluding those based on Provider's net income) upon the Software as supplied by Provider under this Agreement.

11.3. Force Majeure. No delay, failure, or default, other than a failure to pay fees, will constitute a breach of this Agreement to the extent caused by acts of war, terrorism, earthquakes, other acts of God or of nature, strikes or labor disputes, embargoes, or other causes beyond the performing party's reasonable control.

- 11.4. Assignment & Successors. Customer may not assign this Agreement or any of its rights or obligations hereunder without Provider's written consent. Except to the extent forbidden in this Section 11.4, this Agreement will be binding upon and inure to the benefit of the parties' respective successors and assigns.
- 11.5. Severability. To the extent permitted by law, the parties waive any provision of law that would render any clause of this Agreement invalid or unenforceable. In the event that a provision herein is held to be invalid or unenforceable, such provision will be interpreted to fulfill its intended purpose to the maximum extent permitted by law, and the remaining provisions of this Agreement will continue in full force and effect.
- 11.6. No Waiver. Neither party will be deemed to have waived any of its rights under this Agreement by lapse of time or by any statement or representation other than by an authorized representative in an explicit written waiver. No waiver of a breach hereof will constitute a waiver of any other breach of this Agreement.
- 11.7. Choice of Law & Jurisdiction: This Agreement will be governed by the laws of the State of California, without reference to any conflicts of law principles. The parties consent to the personal and exclusive jurisdiction of the federal and state courts of Orange County, California.
- 11.8. Conflicts. Should this Agreement conflict with any other agreements, this Agreement will govern.
- 11.9. Construction. The parties agree that the terms of this Agreement result from negotiations between them. This Agreement will not be construed in favor of or against either party by reason of authorship.
- 11.10. Entire Agreement. This Agreement sets forth the entire agreement of the parties and supersedes all prior or contemporaneous writings, negotiations, and discussions with respect to its subject matter. Neither party has relied upon any such prior or contemporaneous communications.
- 11.11. Execution in Counterparts. This Agreement may be executed in one or more counterparts. Each counterpart will be an original, but all such counterparts will constitute a single instrument.
- 11.12. Amendment. This Agreement may only be amended in writing by authorized representatives of each party.

Appendix B – Business Requirements



SUS Appendix 4 -
BWP Customer Portal

Appendix B – Business Requirements



SUS Appendix 4 -
BWP Customer Portal

Appendix B - Business Requirements

Original Ref #	Ref #	Requirement Description	Priority	Vendor Response (A, B, C or D)	Product (Module) & Version	Reference/ Comments
	1.	Customer Web Portal				
	1.1.	Security and Enrollment				
	1.1.1	Does your Web solution provide the ability for secure user access through a combination of account number and personal ID (PIN or Password)?	3	A	SCM® Portal 6.5	SCM® customer portal is a very secure application designed for utilities and customers. During the registration/ signup process, BWP customers will be asked to provide a preferred username and password to log into the SCM® application in their uniquely identifiable accounts. The customer can use e-mail address as their username. Post sign-up, system will validate login details and provide user the ability to login using his e-mail and password. Customer information is fully protected from unauthorized access. SCM® automatically block any unauthorized attempt to gain access to SCM® web or mobile application.
	1.1.2	Does your solution support managing multiple utility accounts with one set of login credentials?	3	A	SCM® Portal 6.5	SCM® enables BWP customers to manage multiple accounts using a single sign-on. A customer will have the ability to view multiple accounts and also have the option to add / edit/ delete those accounts. Our application is designed intelligently to accommodate multiple service contracts at a single screen. If the contract account contains numerous service contracts then SCM® application displays the customer account information in a condensed form, which can be expanded to view detailed information. Based on BWP customer's requirements, SCM® can be customized to accommodate all scenarios. We provide GUI controls to the customers which let them select the appropriate option from the drop down list to view the desired information.
	1.1.3	Does your solution provide support for account verification for enrollment?	3	A	SCM® Portal 6.5	Our solution holds customer privacy and security as a top priority. The customers can register any time anywhere using the easy quick and secure registration process on mobile, web, tablet or iPad. Customers are asked to provide necessary information to register and login into the SCM® application. Customers will be routed to the secure enrollment page where the required enrollment information will be collected. Authentication is performed in real-time by cross-referencing customer information in a relational database hosted by SUS. During this stage, the customer also assigns themselves a User ID and Password which is used to access the secured site in the future. We can tailor our customer registration process as per BWP's business process which we will defined during the proposed workshop sessions in the first week of our engagement.
	1.1.4	Does your solution support the integration of the utilities' social media presence (i.e., Facebook, Twitter, Google+, Instagram, etc.)?	3	A	SCM® Portal 6.5 (Connect Me Module)	'Connect Me' Module provides social network connectivity and the ability to send and receive messages directly to or from the utility using social media platforms. Users can access the utility Twitter, Google+, Instagram and Facebook webpages through the social media tabs in 'Connect Me' module.
		Does your Web solution provide an existing utility customer an immediate enrollment process that requires them, upon initial enrollment for Web access to:				
	1.1.5	> Provide their utility account number and their social security number/tax ID/Driver License to validate user access?	3	A	SCM® Portal 6.5	SCM® is a very secure application designed for utilities and customers. During the registration/ signup, customers will be asked to provide their social security number/tax ID/Driver License to validate user access which will be verified before taking to next step of enrollment or registration.
	1.1.6	> Establish the customer's own user login ID?	3	A	SCM® Portal 6.5	Yes, SCM® solution is compliant with given requirement.
	1.1.7	> Establish the customer's own password or PIN?	3	A	SCM® Portal 6.5	SCM® solution provide self-service password management in a highly secured environment that enables the customer to establish its own password at the time of registration. Also SCM® solution provides 'Change Password' feature wherein a customer can change their password by providing the valid information.

Appendix B - Business Requirements

Original Ref #	Ref #	Requirement Description	Priority	Vendor Response (A, B, C or D)	Product (Module) & Version	Reference/ Comments
		Does your Web solution provide an existing utility customer an enrollment process that forwards to the customer a system generated temporary password via:				
	1.1.8	> Customer's mailing address on record?	3	A	SCM® Portal 6.5	Yes, SCM® solution is compliant with given requirement and the system generated temporary password will be sent to concerned customer's registered mailing address or email address while enrollment of the existing utility customer. This option for email address or mailing address can be customized as per the requirements of the City.
	1.1.9	> Customer's email address on record?	3	A	SCM® Portal 6.5	Yes, SCM® solution is compliant with given requirement and the system generated temporary password will be sent to concerned customer's registered mailing address or email address while enrollment of the existing utility customer. This option for email address or mailing address can be customized as per the requirements of the City.
	1.1.10	Can your Web solution automatically lock out a customer after a user defined number of failed log on attempts?	3	A	SCM® Portal 6.5	User authentication information is fully protected from unauthorized access. SCM® automatically block any unauthorized attempt to gain access to web or mobile applications. SCM® solution tracks all failed authentication attempts and provide configurable option to temporarily disable access if user exceeds multiple login attempts with configurable time for security. IP address, time, username device type (web, smartphone, browser, OS version etc.) are captured. Failed authentication and user behavior logs are stored in database and system/service and database logs are stored in file system for auditing purpose.
		Does your Web solution allow a CSR to reset the user ID and/or password for an enrolled customer and forward a temporary system generated password via:				
	1.1.11	> Customer's mailing address on record?	3	A	SiQ® Portal (Admin Module)	Yes, SCM® solution is compliant with given requirement where CSR's can reset User ID & password for enrolled customers. The system generated temporary password will be sent to concerned customer's registered mailing address.
	1.1.12	> Customer's email address on record?	3	A	SiQ® Portal (Admin Module)	Yes, SCM® solution is compliant with given requirement where CSR's can reset User ID & password for enrolled customers. The system generated temporary password will be sent to concerned customer via e-mail also to the registered email address.
		If a temporary password has been assigned, initially or after a reset, does your Web solution require the customer to:				
	1.1.13	> Log in with the temporary password?	3	A	SCM® Portal 6.5	Yes, SCM® solution is compliant with given requirement.
	1.1.14	> Establish the customer's own user login ID?	3	A	SCM® Portal 6.5	Yes, SCM® solution is compliant with given requirement.
	1.1.15	> Establish the customer's own password or PIN?	3	A	SCM® Portal 6.5	SCM® solution provide self-service password management in a highly secured environment through our 'Change Password' feature wherein a customer can change their password by providing the valid information.
	1.1.16	Can minimum requirements for the user ID be established and enforced via a system rule (e.g., 8 character with at least one number)?	3	A	SCM® Portal 6.5	During SOW finalization stage, SUS will discuss on all user authentication requirements with BWP and accordingly establish system restriction for permissible User ID formats.
	1.1.17	Can minimum requirements for the password or PIN be established and enforced via a system rule?	3	A	SCM® Portal 6.5	Currently below are the restrictions and validations configured in the system. These are basic validations and can be changed and configured as per the criteria's of BWP. The password must meet the following criteria: 1. 8 characters minimum up to max of 24 2. Must contain one capital letter 3. Must contain one numeric 4. Must contain one special character ({} () [] #?! * \$ @ % ^)

Appendix B - Business Requirements

Original Ref #	Ref #	Requirement Description	Priority	Vendor Response (A, B, C or D)	Product (Module) & Version	Reference/ Comments
	1.1.18	Does your product allow a user to "share" account access to another user (spouse, family member, etc)?	3	A	SCM® Portal 6.5 (My Account)	SCM® application provides the capability to a user to 'share' account access to another user like spouse, family member etc. The landing page of SCM® portal allows the shared account user to view their average usage, average bill amount by entering the service address that customer wishes to retrieve information for. Consistent services will be provided for both Web and Mobile 'share' account users. During the scope definition with BWP team, SUS will discuss permissible list of customer services to be provided for 'share account' users through SCM® application. The mentioned requirement is configurable and will be implemented in accordance with BWP specifications.
	1.1.19	Does your product allow the authorized user to set up their own log in credentials?	3	A	SCM® Portal 6.5	Yes, during the registration/ signup, customers will be asked to set up a username and password to log into the SCM® application in their uniquely identifiable accounts.
	1.1.20	Can a user revoke an authorized users account access?	3	A	SCM® Portal 6.5 (Admin module)	Yes the primary account holder can revoke access for other "guest" users.
	1.1.21	Once a customer has enrolled for Web Self-service via one of the procedures described above, does your product provide the customer the ability to view a listing of their account(s) and access information for the individual service addresses?	3	A	SCM® Portal 6.5 (My Account Module)	Yes, SCM® platform allow customers to view listing of their multiple accounts and access related information for the individual service addresses. This is enabled by Single-Sign on functionality in-built in our SCM® platform. BWP customers will have the ability to view multiple accounts and also have the option to add / edit/ delete those accounts. Our application is designed intelligently to accommodate multiple service contracts at a single screen. If the contract account contains numerous service contracts then SCM® application displays the customer account information in a condensed form, which can be expanded to view detailed information. Based on BWP requirements, SCM® can be customized to accommodate all scenarios. We provide GUI controls to the customers which let them select the appropriate option from the drop down list to view the desired information.
	1.1.22	Does your product meet PCI Data Security compliance?	3	A	SCM® Portal 6.5	Yes, our product meets PCI compliance requirements. Our web & mobile self-service applications use multilayer encryption measures meeting PCI-DSS compliance standards.
	1.2.	Customer Interaction				
	1.2.1	Does your product provide a feature for a customer to execute a payment via Web access to their CIS account information?	3	A	SCM® Portal 6.5 (Billing module)	The SUS solution will enable BWP customers to execute payments as per convenience. The electronic payment services are available for 365x24x7 with 100% uptime. The billing module of SCM® portal provides different payment modes like credit card, bank debit card, net banking for one- time or scheduled payments. The Billing module also lets customers download their payment dues/bills in PDF format. All payments made using SCM® portal will be posted to the Billing/CIS system of BWP in real time to update the billing balance on customer account. The BWP staff can view real-time reports on payment transactions along with the customer account information for the payments.
	1.2.2	Does your product allow for "real time" payment posting for both ACH and Credit Card transactions?	3	A	SCM® Portal 6.5 (Billing module)	The SCM® Billing Module enables real time posting for both ACH and Credit Card transactions undertaken by the customers(as available from CIS).We support real-time data exchange from CIS through our extensive Web service/API set. The SCM® solution also provides various modes of payment including credit and debit card, ACH, bank account, etc. as per the requirements of BWP.
	1.2.3	Can your product limit the amount of a payment to the account balance in order to avoid overpayments?	3	A	SCM® Portal 6.5	SUS complies with the given requirement. Our SCM® solution has the ability to limit the amount of a payment to the account balance in order to avoid overpayments.
		Does your product allow customers to set recurring payments?				

Appendix B - Business Requirements

Original Ref #	Ref #	Requirement Description	Priority	Vendor Response (A, B, C or D)	Product (Module) & Version	Reference/ Comments
	1.2.4	>By specified Date?	3	A	SCM® Portal 6.5 (Billing module)	For pre-authorize/automatic bill payments, SCM® allow users to enroll for recurring payments by specified date, bill due date and by other date parameters (weekly, monthly, days from due date etc). Automatic Payments can be made using debit card, credit card, or ACH. The added payment information is first validated and then provided to the user for recurring payments, which they can select while selecting the bill payment mode. BWP customers enrolled in automatic bill payments, will have the access to delete their bill payment modes anytime from any device if a customer wishes to remove the bank account from customers account.
	1.2.5	>By Bill Due Date?	3	A	SCM® Portal 6.5 (Billing module)	SCM® allow users to enroll for recurring payments by bill due date. Please refer to the above requirement.
	1.2.6	>By other date parameters (weekly, monthly, days from due date, etc)?	3	A	SCM® Portal 6.5 (Billing module)	SCM® allow users to enroll for recurring payments by date parameters such as weekly, monthly, days from due date etc. Please refer to 1.2.4 requirement.
		Does your product provide a customer the ability to view the following account information in "real time"?				
	1.2.7	>Real time Current balance?	3	A	SCM® Portal 6.5 (Billing module)	<p>The SCM® platform is based on a Service Oriented Architecture and supports XML, SOAP and RESTful web services for system integration. SUS cloud solution supports real-time data exchange through our extensive Web service/API set. Our pre-built data connectors fetch information via job runs executed for purpose of real-time current balance, real-time past due amount, real-time date of last payment, real-time customer mailing address, telephone numbers, real-time account service order history for prior 13 months, real-time global messages, real-time consumption history for all services, real-time account transaction history for prior month and prior 13 months, customer mailing address, historic and active accounts, employer information, weather and degree day history, images of collection letters such as delinquency letters, real-time customer or customer specific messages, real-time expected cut-off date, real-time enrollment, customer authentication, real-time usage data or any other modification performed by customer or utility staff.</p> <p>All data is stored in different tables in a relational database and mapped using customer and account id information. We have proprietary algorithms which collects and correlates the data from multiple third party resources to ensure the validity and accuracy of these attributes and comparisons.</p>
	1.2.8	> Past due amount?	3	A	SCM® Portal 6.5 (Billing module)	We comply with this requirement, please refer Requirement 1.2.7 above.
	1.2.9	> Expected cut-off date?	3	A	SCM® Portal 6.5 (Billing module)	We comply with this requirement, please refer Requirement 1.2.7 above.
	1.2.10	> Date of last payment?	3	A	SCM® Portal 6.5 (Billing module)	We comply with this requirement, please refer Requirement 1.2.7 above.
	1.2.11	> Customer mailing address?	3	A	SCM® Portal 6.5 (Billing & My Account module)	We comply with this requirement, please refer Requirement 1.2.7 above.

Appendix B - Business Requirements

Original Ref #	Ref #	Requirement Description	Priority	Vendor Response (A, B, C or D)	Product (Module) & Version	Reference/ Comments
	1.2.12	> Consumption history for all services?	3	A	SCM® Portal 6.5 (Usage module)	We comply with this requirement, please refer Requirement 1.2.7 above.
	1.2.13	> Account transaction history for the prior month?	3	A	SCM® Portal 6.5 (Billing module)	We comply with this requirement, please refer Requirement 1.2.7 above.
	1.2.14	> Account transaction history for prior 13 months?	3	A	SCM® Portal 6.5 (Billing module)	We comply with this requirement, please refer Requirement 1.2.7 above.
	1.2.15	> Account service order history for the prior 13 months?	3	A	SCM® Portal 6.5 (Service module)	We comply with this requirement, please refer Requirement 1.2.7 above.
	1.2.16	> Image of most recent 13 bills?	3	A	SCM® Portal 6.5 (Billing module)	We comply with this requirement, please refer Requirement 1.2.7 above.
	1.2.17	> Images of Collection Letters (Delinquency letters)?	3	A	SCM® Portal 6.5	We comply with this requirement, please refer Requirement 1.2.7 above.
	1.2.18	> Telephone numbers?	3	A	SCM® Portal 6.5 (My Account module)	We comply with this requirement, please refer Requirement 1.2.7 above.
	1.2.19	> Historic and active accounts by customer?	3	A	SCM® Portal 6.5 (My Account module)	We comply with this requirement, please refer Requirement 1.2.7 above.
	1.2.20	> Weather and degree day history?	3	A	SCM® Portal 6.5	We comply with this requirement, please refer Requirement 1.2.7 above.
	1.2.21	> Email address?	3	A	SCM® Portal 6.5 (My Account module)	We comply with this requirement, please refer Requirement 1.2.7 above.
	1.2.22	> Employer information?	3	A	SCM® Portal 6.5	As explained in 1.2.7 requirement, we comply with this requirement.
	1.2.23	> Customer or customer group specific messages?	3	A	SCM® Portal 6.5 (Notification & Admin module)	We comply with this requirement, please refer Requirement 1.2.7 above.
	1.2.24	> Global messages?	3	A	SCM® Portal 6.5 (Notification & Admin module)	We comply with this requirement, please refer Requirement 1.2.7 above.
	1.2.25	Does your product warn a user of pending collection activity (Urgent payment requests, Disconnection warnings, Payment arrangement missed, etc)?	3	A	SCM® Portal 6.5 (Notification module)	SCM® solution provides a 'Notification' module that will allow BWP to build and manage customized outgoing alerts and notification along with various pre-built templates using various communication channels such as email, text, push notification, IVR, etc. Notification module helps to notify or warn utility customers about urgent payment requests, disconnection warnings, payment arrangement missed etc. related messages. All the alerts received by the customers will be displayed as a list in 'Notification' module into the Inbox as well as in the categorized folders. These notifications/alerts can be sent manually by the admin or can be set rule based on specific parameters such as date, payment due, etc.

Appendix B - Business Requirements

Original Ref #	Ref #	Requirement Description	Priority	Vendor Response (A, B, C or D)	Product (Module) & Version	Reference/ Comments
		Does your product provide notifications for the following:				
	1.2.26	> Bill is ready to view?	3	A	SCM® Portal 6.5 (Notification Module)	SCM® solution provides a 'Notification' module that will allow BWP to build and manage customized outgoing alerts and notification along with various pre-built templates using various communication channels such as email, text, push notification, IVR, etc. Notification module helps to notify utility customers about billing, usage, outage, goals, rebates, programs, usage warnings, demand response, scheduled work/service requests, restoration of outages, pricing alerts (based on peak, mid peak, off peak hours etc.), monthly bills, bill ready messages, late payment messages, bill due dates, etc. related messages. All the alerts received by the customers will be displayed as a list in 'Notification' module into the inbox as well as in the categorized folders.
	1.2.27	> Amount and due date of Bill?	3	A	SCM® Portal 6.5 (Notification Module)	We comply with this requirement, please refer Requirement 1.2.26 above.
	1.2.28	> Bill is due X amount of days prior to due date?	3	A	SCM® Portal 6.5 (Notification Module)	We comply with this requirement, please refer Requirement 1.2.26 above.
	1.2.29	> Payment has been received?	3	A	SCM® Portal 6.5 (Notification Module)	We comply with this requirement, please refer Requirement 1.2.26 above.
	1.2.30	> Payment is Late?	3	A	SCM® Portal 6.5 (Notification Module)	We comply with this requirement, please refer Requirement 1.2.26 above.
	1.2.31	> Pending Collection activity (Urgent request for payment, Disconnection warning, etc) including amount of payment due and date?	3	A	SCM® Portal 6.5 (Notification Module)	Notification Module helps to notify utility customers about all the pending collection activities such as urgent request for payment, disconnection warning etc. including amount of payment due and date etc. All the alerts will be received by customers via various communication channels such as email, text, push notification, IVR, etc. and will be displayed as a list in 'Notification' module into the inbox as well as in the categorized folders.
	1.2.32	> Possible Leak based on a configurable flow rate based on meter size (X of gallons per hour for a certain amount of hours)?	3	A	SCM® Portal 6.5 (Notification Module)	SCM® solution provides a 'Notification' module that will allow BWP to build and manage customized outgoing alerts and notification based on configurable flow rate base on meter (X of gallons per hour for a certain amount of hours) along with various pre-built templates using various communication channels such as email, text, push notification, IVR, etc. Notification module helps to notify utility customers about possible leaks etc. related messages. All the alerts received by the customers will be displayed as a list in 'Notification' module into the inbox as well as in the categorized folders.
	1.2.33	> Pricing alert (based on on peak, mid peak, off peak hours)?	3	A	SCM® Portal 6.5 (Notification Module)	We comply with this requirement, please refer Requirement 1.2.26 above.
	1.2.34	> Usage warnings based on a user specified value (usage or dollars) between billing cycles?	3	A	SCM® Portal 6.5 (Notification Module)	We comply with this requirement, please refer Requirement 1.2.26 above.

Appendix B - Business Requirements

Original Ref #	Ref #	Requirement Description	Priority	Vendor Response (A, B, C or D)	Product (Module) & Version	Reference/ Comments
	1.2.35	> Outage Notifications?	3	A	SCM® Portal 6.5 (Notification & Outage Module)	As explained in 1.2.26 requirement, we comply with this requirement. This requirement is also fulfilled by the Outage module that depicts information for all current and planned outages along with status and restoration times.
	1.2.36	> Power Restoration?	3	A	SCM® Portal 6.5 (Notification Module)	We comply with this requirement, please refer Requirement 1.2.26 above.
	1.2.37	> Other alerts that can be configured at a later time based on BWP's needs?	3	A	SCM® Portal 6.5 (Notification & My Account Module)	This requirement is fulfilled by 'Notification' Module of SCM® Admin Module which has customized templates to notify utility customers for any subject matter facilitating real time two-way communication between BWP and its customers.
	1.2.38	>Does your product offer notifications (1.2.28 - 1.2.38) via SMS?	3	A	SCM® Portal 6.5 (My Account Module)	Yes, SCM® solution offer notifications (1.2.28 - 1.2.38) via SMS. It allows the utility & its customers to communicate using 2-way SMS messaging, If a user opts text/sms as one of the preferred mode, customers will receive SMS related to billing, outage, usage, pricing and payment alerts, possible leaks, demand response related and other user-specific messages. 'My Account' module of SCM® provides the customers the freedom to set the type of notification/alerts (e-mail, text, push notification and IVR) for various reasons such as bill due dates, arrange for notifications if their previously set goal is met or exceeds the set limit, if their daily usage is nearing a certain threshold, or if their usage spikes increases by certain threshold level, etc. Customers also have the option to set the frequency and the time period during which they would prefer receiving notifications.
	1.2.39	>Does your product offer notifications (1.2.28 - 1.2.38) via Email?	3	A	SCM® Portal 6.5 (My Account Module)	SCM® solution is compliant with given requirement and offer SCM® portal users with e-mail exchange option to compose, receive, forward, save, reply all, BCC, save as favourite for immediate access via "Notification" module. 'My Account' module of SCM® provides the customers the freedom to set the type of notification/alerts (e-mail, text, push notification and IVR) for various reasons such as bill due dates, arrange for notifications if their previously set goal is met or exceeds the set limit, if their daily usage is nearing a certain threshold, or if their usage spikes increases by certain threshold level, etc. Customers also have the option to set the frequency and the time period during which they would prefer receiving notifications.
	1.2.40	>Does your product for custom email content including marketing messages and external links?	3	A	SCM® Portal 6.5 (Admin Module)	SCM® Admin Module enable utility staff to create and manage e-mail templates. BWP staff will have flexibility to use pre-defined e-mail templates available in application or create fresh template for e-mail communication via SCM® admin module. These templates can be configured and branded based on BWP specifications.
	1.2.41	Does the solution aggregate the changes into a single communication?	3	A	SCM® Portal 6.5	Our application is designed intelligently to consolidate related changes into single communication for easy tracking. The user-friendly SCM® interface has been designed with minimal step navigation requirement and intelligent routing mechanism. This task will be executed under pre-defined validations, business logics as per BWP requirement.
	1.2.42	Does the solution support the above independent of the source of the change (e.g., CSR vs. Web)?	3	A	SCM® Portal 6.5	Yes, SCM® solution support above requirement irrespective of the source of the change i.e. CSR or Web. All impacted data points/attributes are synchronized in real-time with Utility backend systems for uniformity and integrity of data.

Appendix B - Business Requirements

Original Ref #	Ref #	Requirement Description	Priority	Vendor Response (A, B, C or D)	Product (Module) & Version	Reference/ Comments
	1.2.43	Does your product allow customers to link multiple email addresses to a single username/account?	3	A	SCM® Portal 6.5 (My Account Module)	This requirement is fulfilled by the My Account module of SCM® platform that enables the customer to link multiple email addresses or mail address to his/her single username or account.
	1.2.44	>if multiple email addresses are allowed, can a user set email notification preferences?	3	A	SCM® Portal 6.5 (My Account Module)	The proposed solution complies with this requirement. The customer can edit the method of notification preferences (e.g., mail, email, text) using the 'My Account' module of web portal along with selecting the options such as the preferred email address for a specific type of notification. The customer can also select the events for which he/she wants notifications along with the time and frequency.
	1.2.45	Does your product allow customers to link multiple accounts to a single username/email address?	3	A	SCM® Portal 6.5 (My Account Module)	SCM® platform allow customers to manage their multiple accounts and access related information under single username/email address. This is in-built functionality in our SCM® platform. During the registration/sign-up process, customer can link multiple accounts to a single username/email address to their profile. BWP customers will have the ability to view multiple accounts and also have the option to add / edit/ delete those accounts from profile. The concerned stakeholders will be automatically notified for any change in user profile.
		Does your product provide a customer the ability to update the following via the web with proper security access:				
	1.2.46	> User ID?	3	A	SCM® Portal 6.5 (My Account Module)	Yes, SCM® web portal enables the customers to edit and manage their profiles anywhere anytime with proper security. The customer can easily change the user ID, Password, PIN, Mailing address, effective dates, address, telephone number, email addresses, method of notification, payment and employer information, marketing preferences, layout, etc using the 'My Account' module of SCM® solution enabling customer to personalize the portal as per their requirements and edit their personal information on their without utility help. Though these changes are tracked by the utility for their validations and analysis.
	1.2.47	> Password or PIN?	3	A	SCM® Portal 6.5 (My Account Module)	Please refer requirement 1.2.46, the customer can edit the password or pin using the web portal with proper security.
	1.2.48	> Mailing address?	3	A	SCM® Portal 6.5 (My Account Module)	Please refer requirement 1.2.46, the customer can edit the Mailing addresses using the 'My Account' module of web portal with proper security.
	1.2.49	> Telephone numbers?	3	A	SCM® Portal 6.5 (My Account Module)	Please refer requirement 1.2.46, the customer can edit the Telephone numbers using 'My Account' module of the web portal with proper security.
	1.2.50	> Email address?	3	A	SCM® Portal 6.5 (My Account Module)	Please refer requirement 1.2.46, the customer can edit the Email addresses using the 'My Account' module of web portal with proper security.
	1.2.51	> Method of notification preferences (e.g., mail, email, text)?	3	A	SCM® Portal 6.5 (My Account Module)	Please refer requirement 1.2.46, the customer can edit the method of notification preferences (e.g., mail, email, text) using the 'My Account' module of web portal with proper security. The customer can also select the events for which he/she wants notifications along with the time and frequency.

Appendix B - Business Requirements

Original Ref #	Ref #	Requirement Description	Priority	Vendor Response (A, B, C or D)	Product (Module) & Version	Reference/ Comments
	1.2.52	> Employer information?	3	A	SCM® Portal 6.5 (My Account Module)	Please refer requirement 1.2.46, the customer can edit the employer information(name, address, email address, telephone number etc.) using the 'My Account' module of web portal with proper security. The customer can also select the events for which he/she wants notifications along with the time and frequency.
	1.2.53	> Responses to specific messages (e.g., access information)?	3	A	SCM® Portal 6.5 (Notification Module)	Our SCM® solution gives the customer and BWP a platform to interact with each other. The proposed solution has the ability to respond to specific messages (e.g. access information) via 'Notification Module' via the 'Compose Message' option. The message will be displayed in the sub category folders such as outage, billing etc.
	1.2.54	> For the above requests, does your product provide an email notification that the request was submitted?	3	A	SCM® Portal 6.5 (Notification Module)	The SCM® solution enables the customers to change their personal information and preferences on their own without request, but informations that need approval from the admin would require a request sent to the admin for doin so, In such cases an email notification is received by the customer that the request is submitted to the admin. Also a notification would be received if the request is accepted or not.
	1.2.55	Does your product validate the above Information prior to acceptance (describe level of validation)?	3	A	SCM® Portal 6.5	The SCM® solution enables various business rules and validations in order to validate the above information prior to acceptance from the utility. The SCM® solution checks these validations and enables the customers to actually add and update information such as telephone numbers, email address, password or pin, employer information etc. through the Web provided the account meets certain user defined criteria. The customers are prompted to attach appropriate documentation, as applicable based on the type of the request which are also validated. If the changes are not accepted the user gets a notification regarding the same. Also the admin can track the changes and updates made the user in the profile.
		Does your product provide a audit trail of all customer entered changes that includes:				
	1.2.56	> Customer's user ID?	3	A	SCM® Portal 6.5 (Admin Module)	SCM® Admin Portal has this capability to provide an audit trail of all customer entered changes. Any changes made by the customer in their profile can be easily tracked by BWP Admin. BWP can download these changes in multiple file formats, store them in their system and analyze the frequency with which the customers edit their profile details. Also BWP admin would receive notifications whenever any customer makes changes to its profile including Customer User ID, Account Number, Data elements, data of the change, time of change, values before changed, values after changed, etc.
	1.2.57	> Account number?	3	A	SCM® Portal 6.5 (Admin Module)	We comply with this requirement. Please refer to 1.2.56 for reference.

Appendix B - Business Requirements

Original Ref #	Ref #	Requirement Description	Priority	Vendor Response (A, B, C or D)	Product (Module) & Version	Reference/ Comments
	1.2.58	> Data element(s) changed?	3	A	SCM® Portal 6.5 (Admin Module)	We comply with this requirement. Please refer to 1.2.56 for reference.
	1.2.59	> Date of the change?	3	A	SCM® Portal 6.5 (Admin Module)	We comply with this requirement. Please refer to 1.2.56 for reference.
	1.2.60	> Time of the change?	3	A	SCM® Portal 6.5 (Admin Module)	We comply with this requirement. Please refer to 1.2.56 for reference.
	1.2.61	> Value(s) before the change?	3	A	SCM® Portal 6.5 (Admin Module)	We comply with this requirement. Please refer to 1.2.56 for reference.
	1.2.62	> Value(s) after the change?	3	A	SCM® Portal 6.5 (Admin Module)	We comply with this requirement. Please refer to 1.2.56 for reference.
	1.2.63	Does your product provide the ability for customers to access and complete forms/applications via the Web for later processing?	3	A	SCM® Portal 6.5 (My Account & Efficiency Module)	Yes, the SCM® portal allows the customers to access web-pages/forms/online templates that can be filled and submitted for later processing. All Web pages and desired web-form templates will be designed in collaboration with BWP and deployed post sign-off from BWP project team. We will replicate the exact user experience (UX) and content from the customer's point-of-view as per branding specifications of BWP.
	1.2.64	Does your product produce an email from the customer that includes the account information from their log-in? Does your product monitor/report on:	3		SCM® Portal 6.5	Yes, our product is able to produce account information based on the user's login.
	1.2.65	> Customer Contact received via web or IVR?	3	A	SCM® Portal 6.5 (Admin module)	The solution complies with the given requirement.
	1.2.66	>Delinquency Notices	3	A	SCM® Portal 6.5 (Admin module)	The solution complies with the given requirement.
	1.2.67	> Customer Contact completed (response sent)?	3	A	SCM® Portal 6.5 (Admin module)	The solution complies with the given requirement.
	1.2.68	>Module specific views?	3	A	SIQ® Portal (Admin module)	Admin Module has existing functionality to track user activity in real-time In terms of screen navigated, modules accessed, payment activity, customer traffic, modification done or any additional task performed by the customer during active web session. The Customer Service Representatives (CSR) of BWP will be provided access rights to access and see exactly what a customer is viewing in a Web session. In addition, SUS systems provide statistics reports on customer behavior, IP address used etc. To facilitate the same, SUS system generates a session code for CSR to login to desired customer account. This way CSR can execute task without the customer having to turn over their desktop control to the Utility. The access rights & role mapping control to be configured as per BWP specification.

Appendix B - Business Requirements

Original Ref #	Ref #	Requirement Description	Priority	Vendor Response (A, B, C or D)	Product (Module) & Version	Reference/ Comments
	1.2.69	>Customer traffic?	3	A	SIQ® Portal (Admin module)	The solution complies with the given requirement. Please refer to 1.2.68 requirement.
	1.2.70	>Payment activity?	3	A	SIQ® Portal (Admin module)	The solution complies with the given requirement. Please refer to 1.2.68 requirement.
	1.2.71	Does your product allow a customer to request enrollment in a budget plan through the Web given the account meets certain qualifications setup in CIS?	3	A	SCM® Portal 6.5 (Effeciency & Service module)	SCM® enables BWP Customers to enroll In various budget plan through the Web given the account meets certain qualifications setup in CIS (e.g., 12 months of history and good credit). These requests are sent to admin for approval. The validation are set as per the CIS or can be configured by the admin as well.
	1.2.72	Does your product allow a customer to enroll in a budget plan through the Web given the account meets certain qualifications setup in CIS (e.g., 12 months of history and good credit)?	3	A	SCM® Portal 6.5 (Effeciency & Service module)	SCM® enables BWP Customers to enroll in various budget plan through the Web given the account meets certain qualifications setup in CIS (e.g., 12 months of history and good credit). These requests are sent to admin for approval. The validation are set as per the CIS or can be configured by the admin as well.
	1.2.73	Does your product display the calculated budget to the customer prior to actual enrollment?	3		SCM® Portal 6.5	The solution complies with the given requirement and displays the calculate budget prior to the actual enrollment picking it form the CIS, this enables the customers to take the appropriate decision.
	1.2.74	Does your product allow "real time" enrollment by updating the CIS?	3	A	SCM® Portal 6.5	Yes The SCM® platform allows real time enrollment In various plans or pgrams by updating in the CIS as it is based on a Service Oriented Architecture and supports XML, SOAP and RESTful web services for system integration. SUS cloud solution supports real-time data exchange through our extensive Web service/API set. Our pre-built data connectors fetch information via job runs executed for purpose of real-time enrollment, customer authentication, real-time usage data, real-time account balance/ payment update or any other modification performed by customer or utility staff. If the user updates any information in SCM® application, it sends update information back to source system such as CIS to keep it consistent. All data is stored in different tables in a relational database and mapped using customer and account id information. We have proprietary algorithms which collects and correlates the data from multiple third party resources to ensure the validity and accuracy of these attributes and comparisons.
	1.2.75	Does your product allow a customer to request a payment extension through the Web given the account meets certain qualifications setup in CIS (e.g., once a year with a certain credit rating, no pending cut-off, etc.)?	3	A	SCM® Portal 6.5 (Service Module)	SCM® solution enables the customers to request for payment arrangements via 'Service' module which may include payment due date extension, partial payment scheduling, etc. helping customers to make payments along with managing their household expenses. The customer can submit such requests via the web portal or the mobile app which are routed to the appropriate customer service team for approval and create a to do action for a utility employee. The customers are prompted to attach appropriate documentation, as applicable based on the type of the request. Also various validations (e.g., once a year with a certain credit rating, no pending cut-off, etc.) that are maintained in CIS are also checked for this.
	1.2.76	>If Yes, does your product automatically create a Payment Arrangement in CCB?	3	A	SCM® Portal 6.5	This requirement can be configured as per the choice of the BWP, SCM® solution provide two option to the utility, one is of automatic enrollment and approval based on fulfillment of various qualification criterias taken form the CIS or the second one is that a request is sent to the admin for the same and the admin takes the call by approving or rejecting the same.

Appendix B - Business Requirements

Original Ref #	Ref #	Requirement Description	Priority	Vendor Response (A, B, C or D)	Product (Module) & Version	Reference/ Comments
	1.2.77	Does your product allow a customer to establish a payment extension through the Web given the account meets certain qualifications setup in CIS (e.g., once a year with a certain credit rating)?	3	A	SCM® Portal 6.5 (Service Module)	SCM® solution enables the customers to request for payment arrangements which may include payment due date extension, partial payment scheduling, etc. helping customers to make payments along with managing their household expenses. The customer can submit such requests via the web portal or the mobile app which are routed to the appropriate customer service team for approval and create a to do action for a utility employee. The customers are prompted to attach appropriate documentation, as applicable based on the type of the request.
	1.2.78	Does your product allow a customer to enroll in e-billing through the Web?	3	A	SCM® Portal 6.5 (My Account Module)	SCM® helps customers to contribute to the environment by having bills delivered via email. Customers can enroll as well as de-enroll from E-Billing/Paperless Billing through the 'Settings' section of 'My Account' module. For customers who turn off the paper bill delivery, SCM® sends notifications each month when the E-Billing/Paperless bill becomes available on SCM® portal.
	1.2.79	Does your product present to a customer (via drop down list, etc.) any rate-based programs that they are eligible for (e.g., green energy, time-of-use, interruptible, etc.)?	3	A	SCM® Portal 6.5 (Efficiency Module)	This requirement is catered by the 'Efficiency' module of the SCM® solution that presents the customer various rebates, efficiency programs, tips and rate based choice program such as green energy, time-of-use, interruptible etc. in order to save more energy. The details and description of these are also maintained in this module. It also provides personalized recommendations for rate-based programs and rebates that could lead to more energy saving by the customer. The customer can also make changes in their enrollments within a defined frame of time.
	1.2.80	Does your product allow a customer to enroll in any of their eligible rate-based programs?	3	A	SCM® Portal 6.5 (Efficiency Module)	This requirement is catered by the 'Efficiency' module of the SCM® solution that allows the customer to enroll in any of their eligible rate-based programs that could lead to more energy savings. The customer can also make changes in their enrollments within a defined frame of time.
	1.2.81	Does your product allow a customer to simulate any of their eligible rate-based programs using their historic data?	3	A	SCM® Portal 6.5 (Usage & Efficiency Module)	Yes, the SCM portal allows customer to simulate their eligible rate-based programs using historic data.
	1.2.82	Does your product allow a customer to enroll in various charity programs through the Web (e.g., round-up, project share, etc.)?	3	A	SCM® Portal 6.5 (Efficiency Module)	SCM® can be configured to meet this requirement leveraging the 'Efficiency Module' where the utility can present charity programs. A customer can opt in to enroll in these programs and also get all the related information.
	1.2.83	Does your Web solution provide a new customer service request process whereby the customer's identity is verified through an interface to an outside agency (e.g., credit bureau)?	3	A	SCM® Portal 6.5 (Service Module)	Yes, the SCM Service workflow can be configured to interface with any third party agency to complete verification including credit check.
	1.2.84	Once the new customer's identity has been verified as described above, does your product allow that customer to request a turn-on service order for utility service(s) at their requested service address?	3	A	SCM® Portal 6.5 (Service Module)	Once the new customer's identity has been verified, the 'Service Module' of SCM® solution fulfills this requirement that enables the customer to request any service such as turn on service, turn off service, transfer of service, service start/move in, stop/move out, repair, outage, etc. at their requested service address providing a real time communication platform to interact with the utility for any service.
	1.2.85	Also, once the new customer's identity has been verified as described above, does your product (via duplicate social security #/Tax ID or driver's license number) alert the CSR of any outstanding account balances or bad debt prior to the scheduling of a "turn-on" service?	3	A	SiQ® Portal (Admin Module)	SCM® Solution complies to this requirement and provides alert to the CSR of any outstanding account balances or bad debt prior to the scheduling of a "turn-on" service (after the identity verification).
	1.2.86	Does your product calculate and add any deposit requirements via the same rules as the CIS?	3	A		SCM® Solution complies to this requirement and enables to calculate and add any deposit requirements via the same rules as the CIS
		Once a customer has logged into the Web Self-service application does your product provide the customer the ability to:				

Appendix B - Business Requirements

Original Ref #	Ref #	Requirement Description	Priority	Vendor Response (A, B, C or D)	Product (Module) & Version	Reference/ Comments
	1.2.87	> Request a "turn-off" service order for their utility service?	3	A	SCM® Portal 6.5 (Service Module)	The Service Module of SCM® solution fulfills this requirement that enables the customer to request for any service such as service start/move in, stop/move out, turn on service, turn off service, transfer of service, repair, outage, etc. providing a real time communication platform to interact with the utility for any service.
	1.2.88	> Request a transfer service from their existing premises to a new premises?	3	A	SCM® Portal 6.5 (Service Module)	The Service Module of SCM® solution fulfills this requirement that enables the customer to request for transfer service from their existing premises to a new premises providing a real time communication platform to interact with the utility for any service.
	1.2.89	> Request enrollment or a change in their automatic payment processing information (e.g., bank account, maximum amount, etc.)?	3	A	SCM® Portal 6.5 (Service Module)	This requirement is fulfilled by the Billing module of SCM solution that enables the customers to Request enrollment or a change in their automatic payment processing information (e.g., bank account, maximum amount, etc.)
	1.2.90	> Request/schedule a check read?	3	A	SCM® Portal 6.5 (Service Module)	SCM® service module will provide the capability to request/schedule a check read.
	1.2.91	> Request a service/residency letter?	3	A	SCM® Portal 6.5 (Service Module)	SCM® service module will provide the capability to request a service / residency letter.
	1.2.92	> Request a letter for good credit history?	3	A	SCM® Portal 6.5 (Service Module)	The solution will comply with the given requirement. A customer can request BWP for a letter for good internal credit history using the Service module. BWP would analyze the customers previous payment credit history and provide the same accordingly.
	1.2.93	> Complete an on-line form that generates an email (email address user defined) for reporting various activities (e.g., street light outage, illegal watering, etc.)?	3	A	SCM® Portal 6.5 (Service Module)	SCM Connect Me module will provide the capability for customers to report various activities such as reporting a street light outage or illegal watering, etc. The module provides a drop down field which is configurable with pre-defined templates or forms for completion by the customers.
	1.2.94	> For the above requests, does your product provide an email notification that the request was submitted?	3	A	SCM® Portal 6.5 (Notification Module)	SCM® application has in-built alert mechanism that enables Utility staff and customers to be notified for any manual or system-generated notifications. The "Notification module" of SCM® portal features utility defined categories like requests submission, service appointment calls, credit collection request, outage, billing, service, connect me, troubleshooting alerts etc. that automatically segregates these notifications in admin interface based on the event triggered. BWP users will have flexibility to set convenient time slot in 'My Account' module to receive communication from BWP.
	1.2.95	Does your product allow a CSR to "impersonate" a customer allowing them to see what a customer sees?	3	A	SIQ® Portal (Admin Module)	Admin Module has existing functionality to track user activity in real-time in terms of screen navigated, modules accessed, modification done or any additional task performed by the customer during active web session. The Customer Service Representatives (CSR) of BWP will be provided access rights to access and see exactly what a customer is viewing in a Web session. In addition, SUS systems provide statistics reports on customer behavior, IP address used etc. To facilitate the same, SUS system generates a session code for CSR to login to desired customer account. This way CSR can execute task without the customer having to turn over their desktop control to the Utility. The access rights & role mapping control to be configured as per BWP specification.
	1.2.96	> For the above requests, does your product allow CSR's to make changes to a customers preferences?	3	A	SIQ® Portal (Admin Module)	SUS complies with the given requirement.

Appendix B - Business Requirements

Original Ref #	Ref #	Requirement Description	Priority	Vendor Response (A, B, C or D)	Product (Module) & Version	Reference/ Comments
	1.2.97	> For the above requests, does your product allow CSR's to make changes to a customers profile (add or delete accounts)?	3	A	SiQ® Portal (Admin Module)	In addition to customer facing SCM® portal, SUS will provide SiQ® Portal admin module for BWP staff including Customer Service Representatives (CSR) to support all customer service related task like account management, addition and deletion of accounts etc. These permissions can be managed using the admin portal.
		Does your product provide for an automated customer satisfaction survey at the completion of a Web session that includes:				
	1.2.98	> Random selection of customers to query?	3	A	SiQ® Portal (Admin Module)	Yes, our proposed SCM® solution has in-built workflow for conducting event-triggered Customer satisfaction surveys for randomly selected target audience(as per various algorithms and logics specific to BWP) where BWP staff will have flexibility to use pre-defined survey templates available in application or create fresh survey form for target customers via SCM® admin console. These templates can be configured and branded based on BWP specifications. As a standard practice, the survey form is included in the Welcome Letter once customer registers at SCM® self service portal. Based on pre-defined logics, BWP staff can segregate customer groups to automated surveys via web portal or through e-mail. The SCM® admin console will provide configuration options for BWP to setup online customer survey forms using specific questions to measure the customer feedback, customer's awareness about utility initiatives, customer usage patterns, habits, etc. These online surveys help utilities in customer communication with personalized recommendations based on their survey responses. The Utility staff can generate survey reports anytime via admin portal.
	1.2.99	> Scripted questions?	3	A	SiQ® Portal (Admin Module)	Yes, SCM® portal offers scripted questions for each survey category. These scripted questions will be agreed with BWP during the requirement gathering phase and validated at time of acceptance testing. BWP staff can modify questions at any point of time as per business requirement.
	1.2.100	> Capture of numerical ratings for the scripted questions?	3	A	SCM® Portal 6.5	Yes, SCM® interface supports customer response in numerical ratings. This data gets consolidated and available for BWP staff via survey reports.
	1.2.101	> Capture of free form comments?	3	A	SCM® Portal 6.5	Yes, SCM® interface allow users to provide descriptive comments on their digital experience during the SCM® application use. Based on type of survey questions, BWP can configure mix of standard reponses and open ended responses.
	1.2.102	> Capture of follow-up action requests?	3	A	SiQ® Portal (Admin Module)	Through customer survey forms, user can request for follow-up actions and later provide feedback on customer service delivered by BWP team. The BWP staff can view these comments/request via survey reports in admin console.
	1.2.103	> Statistical analysis of responses?	3	A	SiQ® Portal (Admin Module)	Our SCM Admin Portal provides utility the overall summary of customer responses to survey questions. The BWP will have the capability to view statistical analysis at user level, group-level or district level that will help utilities for process improvements, monitor dynamic customer trends, usage behaviour, user-specific issues. Our analytical tool can provide canned reports and executive dashboards for all levels of management to gain access and review the most current survey data. The components of this report can be customized to accommodate all scenarios. The reports can be exported and downloaded in excel or PDF format.
1.3.		Usage Presentation				

Appendix B - Business Requirements

Original Ref #	Ref #	Requirement Description	Priority	Vendor Response (A, B, C or D)	Product (Module) & Version	Reference/ Comments
	1.3.1	Does your product have the ability to present interval metered data for customer requested date ranges and time increments (e.g., last 13 months by day, last month by hour, etc.)?	3	A	SCM® Portal 6.5 (Usage Module)	SCM® platform has existing functionality to support interval usage data. Our solution offer flexibility for utility customers to view hourly intervals or less for both residential and commercial customers. The "Usage" module of SCM portal provide customers a 360 degree view of their energy usage and its patterns enabling customer to analyze their interval usage consumption, hourly, daily, monthly & yearly consumption, historical comparisons, and current rates. Customers can view their historical usage and cost by selecting different registered property addresses, multiple accounts or meters. It provides the flexibility to support 15 minute, hourly, daily, weekly monthly/bi-monthly, yearly or seasonal billing reads in US dollars and energy units. Our solution is fully configurable and can be configured based upon BWP current and future needs. The module also display current usage as well as the projected/estimated consumption units (Kwh), gallon and bill reading (\$) in order to provide complete information to the customers. The weather overlay information is integrated to monitor correlation between the energy usage with the weather conditions to analyze the reasons for high or low usage The desired usage report can be easily downloadable in various readable formats such as PDF, Excel, Word, CSV or HTML.
	1.3.2	Does your product display consumption data by interval, daily total, monthly total, specified date range total?	3	A	SCM® Portal 6.5 (Usage Module)	As explained in the above requirement, SCM® portal is a comprehensive solution that enable customers to view onsumption data by interval, daily total, monthly total, specified date range total. Customers can view their historical usage and cost by selecting different registered property addresses, multiple accounts or meters.
	1.3.3	>If yes, does your product support both Water and Electricity consumption?	3	A	SCM® Portal 6.5 (Usage Module)	The configurable modules of SCM® portal cover all aspects of Water, Electric, Gas utility sector. This type of standardization help utilities in reducing complexity and cost for all future upgrades. Furthermore, Utilities can continue to evolve platform and take advantage of innovative hosted solution by incorporating new and advanced features at a low cost while avoiding customization in back end systems thereby reducing total cost of ownership. The solution will allow BWP to transition without compromising database integrity. The usgae module depicts consumption of both water and power to the customers in the form of interactive graphs for various data intervals.
	1.3.4	>If yes, does your product display consumption in various UOMs (Units of Measure) such as kWh, kva, HCF, CF, gallons, Power Factor, etc.?	3	A	SCM® Portal 6.5 (Usage Module)	This requirement is completely addressed by the 'Usage' module of SCM® solution that displays current and prior 13 months usage data which in various UOMs like kWh, kva, HCF,CF,gallons, Power factor and cost (in dollars) can be configured for presentment as per BWP requirement. SCM® platform is fully configurable and can display numerous years of consumption history in the "Usage" module. Customers can view seasonal, monthly, daily as well as hourly historical consumption data in interactive graphs and tabular representation. Customers can also view their historical usage and cost by selecting different registered property addresses, multiple accounts or meters.
	1.3.5	>If yes, does your product display consumption since the last bill in dollars?	3	A	SCM® Portal 6.5 (Usage Module)	As explained above, SUS solution comply with given requirement. The usage module of SCM® portal displays consumption in cost (dollars) since the last bill.
		Does your product have the ability to present the data as:				
	1.3.6	> Numeric values?	3	A	SCM® Portal 6.5 (Usage Module)	As explained above, SUS solution provide user-friendly tabular and graphical representation for all Utility data like actual usage data, estimated billing, usage trend, previous year comparison etc.

Appendix B - Business Requirements

Original Ref #	Ref #	Requirement Description	Priority	Vendor Response (A, B, C or D)	Product (Module) & Version	Reference/ Comments
	1.3.7	> Line graphs?	3	A	SCM® Portal 6.5 (Usage Module)	SUS solution comply with given requirement.
	1.3.8	> Bar charts?	3	A	SCM® Portal 6.5 (Usage Module)	SUS solution comply with given requirement.
	1.3.9	> Daily Total?	3	A	SCM® Portal 6.5 (Usage Module)	SUS solution comply with given requirement.
	1.3.10	> Time of Use?	3	A	SCM® Portal 6.5 (Usage Module)	Yes, the given requirement is in-built within SCM® application. Our invoice/bill presentation format is flexible and based on extensible data format which allows us to dynamically configure the line items to match the Utility or regulatory requirements for bill display. This may include standard fixed rate calculation, tiered structure pricing, and Time of Use (ToU) rates. For the hourly ToU rate structure, we can display the breakdown of charges based on the ToU time tiers and also provide usage display for the customer to see hourly interval data.
	1.3.11	>Solar Delivered?	3	A	SCM® Portal 6.5 (Usage Module)	Yes the SCM solution fulfills this requirement and also shows the usage/consumption of Solar energy used and produced. This is calculated using the net usage option. The graphs shown in the Solar tab of usga emodule depicts the net solar usage calculated using solar delivered and recieved.
	1.3.12	>Solar Received?	3	A	SCM® Portal 6.5 (Usage Module)	Yes the SCM solution fulfills this requirement and also shows the usage/consumption of Solar energy used and produced. This is calculated using the net usage option. The graphs shown in the Solar tab of usga emodule depicts the net solar usage calculated using solar delivered and recieved.
	1.3.13	>Performance Meters?	3	A	SCM® Portal 6.5 (Usage Module)	Yes. Our product can present any meter data attributes captured through the AMI meters (e.g. performance, power quality, etc).
	1.3.14	>Overlay Solar Net Meter vs. Performance on a single page?	3	A	SCM® Portal 6.5 (Usage Module)	Yes the SCM solution can display both solar net meter and performance on a single page.
	1.3.15	> Aggregation across multiple meters?	3	A	SCM® Portal 6.5 (Usage Module)	SUS solution comply with given requirement and depicts consumption aggregated across multiple meters.
	1.3.16	> Aggregation across multiple accounts?	3	A	SCM® Portal 6.5 (Usage Module)	SUS solution comply with given requirement and depicts consumption aggregated across multiple accounts.
	1.3.17	> Bar charts?	3	A	SCM® Portal 6.5 (Usage Module)	SUS solution provide user-friendly tabular and graphical representation for all Utility data in form of bar charts, pie-charts, trendlines etc.
		Does your product have the ability to support Large Commercial/ Industrial customers?				
	1.3.18	> Calculate and display Power Factor?	3	A	SCM® Portal 6.5 (Usage Module)	SUS solution comply with the given requirement and provide Power factor information to users.
	1.3.19	> Aggregation across multiple meters?	3	A	SCM® Portal 6.5 (Usage Module)	SCM solution allows the BWP commercial/industrial customers to view the data of both aggregated across mutiple meters or for specific meters by selecting the meter in the drop down menu.
	1.3.20	> Aggregation across multiple accounts?	3	A	SCM® Portal 6.5 (Usage Module)	SCM® application is designed intelligently to accommodate charges of multiple accounts at a single screen . User can view an aggregated summary of usage at the User ID level using the 'Usage' module.

Appendix B - Business Requirements

Original Ref #	Ref #	Requirement Description	Priority	Vendor Response (A, B, C or D)	Product (Module) & Version	Reference/ Comments
	1.3.21	> TOU, display across appropriate buckets?	3	A	SCM® Portal 6.5 (Usage Module)	This is addressed in 'Usage' module whereby BWP customers on TOU rate schedules can have a differentiated view of their energy consumption based on TOU Rates. Usage information will be segregated based on Time-of-Use periods – off-peak, mid-peak and on-peak. The customer will get a clear insight of "off peak" hours (when rates are discounted from standard) and "peak" hours (when rates are above standard) which shall enable them to shift their electricity or water usage.
	1.3.22	> Side by side comparison (KVA vs. Power Factor)?	3	A	SCM® Portal 6.5 (Usage Module)	Our product has the ability to perform a side by side comparison of KVA vs. power factor so long as the data is capture and made available by the utility.
	1.3.23	>Reporting capabilities; pre-configured reports that customers can run as needed.?	3	A	SCM® Portal 6.5 (Usage Module)	SCM solution already has some pre-configured report such as "My Home Report", and "Usage Report" that are built into the platform which customers can run to help them understand their usage patterns.
	1.3.24	>Are there limitations on how much interval data is displayed (30 days, 60 days, etc.)?	3	A	SCM® Portal 6.5 (Usage Module)	Our out of the box solution currently display AMI data for up to 1 year in the form of 15 mins interval, hourly, daily, monthly, and seasonal. However, this is configurable and SCM has the capability to show 1 year, 2 years or as defined by the Utility as long as the data is made available.
	1.3.25	>Option to view 5 minute or 15 minute intervals regardless of what Meter Data Management System records ?	3	A	SCM® Portal 6.5 (Usage Module)	Our solution can display any data in any interval so long as the data is made available to us regardless of the MDM system.
	1.3.26	>Display peak usage (kwh, kva; date and time) during a specified time period selected by the customer?	3	A	SCM® Portal 6.5 (Usage Module)	Yes, the SCM portal can be configured to display the peak usage (energy, demand, etc.) for the period specified by the customer.
	1.3.27	>Clock 15 and rolling 15 presentment and display peak usage (date and time)?	3	A	SCM® Portal 6.5 (Usage Module)	Yes the SCM solution can be configured for clock 15 and rolling 15 presentment and display peak usage (date and time).
	1.3.28	Does your product support an export of the data to Excel?	3	A	SCM® Portal 6.5	Our solution provide multiple options for users to download desired information to various user friendly and editable formats such as (Excel, CSV, PDF, etc.)which can be printed at ease. The users can download these reports to their desktop for manipulation and further analysis.
	1.3.29	Does your product have the ability to identify unaudited or unvalidated data from presentation?	3	A	SCM® Portal 6.5	Yes the SCM platform can filter/identify unaudited/unvalidated data from presentation.
	1.3.30	Does your product display Totalized meters?	3	A	SCM® Portal 6.5 (Usage Module)	Yes, the Usage view allows the user to see totalized view of usage as well as that at individual sub meters.
	1.3.31	>if yes, does your product display the detail for each of the sub-meters?	3	A	SCM® Portal 6.5 (Usage Module)	Yes, the Usage view allows the user to see totalized view of usage as well as that at individual sub meters.
	1.3.32	>If yes, does your product display the detail for the virtual meter?	3	A	SCM® Portal 6.5 (Usage Module)	Yes, the Usage view allows the user to see usage view for virtual meter.
	1.3.33	>if yes, does your product display the detail in the appropriate TOU (Time of Use) buckets?	3	A	SCM® Portal 6.5 (Usage & Billing Module)	Yes, the Usage view allows the user to see usage in TOU buckets.
	1.4.	Technical Features		A		

Appendix B - Business Requirements

Original Ref #	Ref #	Requirement Description	Priority	Vendor Response (A, B, C or D)	Product (Module) & Version	Reference/ Comments
	1.4.1	Does your product integrate with Siemens/Emeter Energy IP 6.4 or greater?	3	A	SCM® Portal 6.5	<p>The SCM® platform is based on a Service Oriented Architecture and supports XML, SOAP and RESTful web services for system integration. Our proposed solution is pre-integrated with Siemens/Emeter Energy IP 6.4 or greater. SUS cloud solution supports real-time data exchange through our extensive Web service/API set. Our pre-built data connectors fetch information via job runs executed for purpose of real-time enrollment, customer authentication, real-time usage data, real-time account balance/ payment update or any other modification performed by customer or utility staff. SUS proposed platform SCM® can integrate with your existing and planned systems and provide real-time data exchange/synchronization while maintaining user privacy and data security. The proposed platforms are scalable to accommodate future integration requirements as required by BWP business without significant additional work. Our proposed solution has built-in integration connectors to facilitate automatic data exchanges with your technology environment. Our integration methods are scalable and the solution can be scaled to accommodate more systems integrations</p> <p>SUS solution support XML/Restful web services and flat file batch interface to load/update data from different systems such as usage data, customer information, premise data, allocation etc. using push or pull mechanism. Based on our understanding of RFP scope, we do not foresee any integration challenges with current systems used by the BWP and preferred systems planned.</p> <p>During the kick-off meeting with BWP, SUS team will work with your project team to identify complete list of data sets for real-time synchronization to provide all stakeholders with accurate information. Our systems have inbuilt validations and rules configured that puts a check on invalid entry when performing daily tasks and moving between various discolours. Also utility staff has the rights to monitor and manage all data</p>
	1.4.2	>If yes, is your product able to utilize this product specific API's (Application Program Interface) and Web services?	3	A	SCM® Portal 6.5	<p>As explained above, our solution is capable to interface with all in-house and external third party applications of BWP, provided API links are available for integration. SUS do not foresee any challenge at this stage in integration with Siemens/Emeter Energy IP 6.4 or greater. Our solution will provide real-time data exchange/synchronization with all your current and planned applications while maintaining user privacy and data security. The proposed platforms are scalable to accommodate future integration requirements as required by BWP business.</p>
	1.4.3	Can the integration with the your Web application and Oracle CCB (2.4.0.2 and greater) Solution be accomplished without third party software?	3	A	SCM® Portal 6.5	<p>Yes, our solution is pre-integrated with Oracle CCB 2.4 and doesn't require third party software to accomplish integration.</p>
	1.4.4	>If yes, is your product able to utilize this product specific API's (Application Program Interface) and Web services?	3	A	SCM® Portal 6.5	<p>SUS has developed CC&B adaptor to integrate with CC&B using web service interface.</p>
	1.4.5	Can the integration with the your Web application and Oracle CCB (2.5 and greater) Solution be accomplished without third party software?	3	A	SCM® Portal 6.5	<p>Yes, our solution is pre-integrated with Oracle CC&B 2.5 and does not require third party component/software.</p>
	1.4.6	>If yes, is your product able to utilize this product specific API's (Application Program Interface) and Web services?	3	A	SCM® Portal 6.5	<p>SUS has developed CC&B adaptor to integrate with CC&B using web service interface.</p>
	1.4.7	Does your product integrate with Telvent IVR (Interactive Voice Response) system?	3	A	SCM® Portal 6.5	<p>Yes, our solution is pre-integrated with Telvent IVR (Interactive Voice Response) system and does not require third party component/software.</p>
	1.4.8	>If yes, is your product able to utilize this product specific API's (Application Program Interface) and Web services?	3	A	SCM® Portal 6.5	<p>Yes SCM is able to utilize this product specific API's (Application Program Interface) and Web services</p>
	1.4.9	Does your product integrate with Telvent Responder OMS (Outage Management System) version 10.0.2 or later?	3	A	SCM® Portal 6.5	<p>Yes, our solution is pre-integrated with Telvent Responder OMS (Outage Management System) version 10.0.2 or later and does not require third party component/software.</p>

Appendix B - Business Requirements

Original Ref #	Ref #	Requirement Description	Priority	Vendor Response (A, B, C or D)	Product (Module) & Version	Reference/ Comments
	1.4.10	>If yes, is your product able to utilize this product specific API's (Application Program Interface) and Web services?	3	A	SCM® Portal 6.5	Yes SCM is able to utilize this product specific API's (Application Program Interface) and Web services
	1.4.11	Does your product integrate with Trilliant Headend system (version 9.9.5 and greater)?	3	A	SCM® Portal 6.5	Yes, our solution is pre-integrated with Trilliant Headend system (version 9.9.5 and greater) and does not require third party component/software.
	1.4.12	>If yes, is your product able to utilize this product specific API's (Application Program Interface) and Web services?	3	A	SCM® Portal 6.5	Yes SCM is able to utilize this product specific API's (Application Program Interface) and Web services
	1.4.13	Does your product integrate with Itron Savesource headend system?	3	A	SCM® Portal 6.5	Yes, our solution is pre-integrated with Itron Savesource headend system and does not require third party component/software.
	1.4.14	>If yes, is your product able to utilize this product specific API's (Application Program Interface) and Web services?	3	A	SCM® Portal 6.5	Yes SCM is able to utilize this product specific API's (Application Program Interface) and Web services
	1.4.15	Does your product interface with bill print vendors such as Kubra or others?	3	A	SCM® Portal 6.5	SUS solution is pre-integrated with Bill print vendor technologies and offers innovative electronic Bill Presentment ways for utility customers enabling them to access the bills on web, mobile and printed copies. The "Billing" module of SCM® portal allows online/electronic viewing and payment of customer bills for single and multiple accounts. If required by BWP, SUS will collaborate with Kubra and other top printing vendors to design and publish monthly bill reports based on the same file which will be displayed on the web portal and can be embedded in email format. SUS will print, collate, and mail the paper bills based on agreed upon scope. The bill layout/design for electronic as well as printed copy can be modified as per BWP requirement. SUS Bill Presentment methodology will increase the level of customer engagement and will help BWP to witness increase in customer participation in Innovative energy rates.
	1.4.16	>If yes, is your product able to utilize this product specific API's (Application Program Interface) and Web services?	3	A	SCM® Portal 6.5	SUS solution comply with the given requirement.
	1.4.17	>If yes, can your product integrate with a bill print vendors "bill pop" functionality?	3	A	SCM® Portal 6.5	Yes the SCM platform includes pre-built integration services for bill print vendors for this functionality.
	1.4.18	Does your product provide Single Sign On capabilities?	3	A	SCM® Portal 6.5	Our proposed SCM® platform provide single sign-on capability for authentication and authorization that enable users to successfully log into the application with common login credentials. The solution supports SAML 2.0, ping Identity, Oracle Enterprise single sign-on, Microsoft Enterprise single sign-on, and SAP Netweaver. Most importantly, we can leverage your current existing single sign-on protocol.
	1.4.19	> If yes, using SAML 2.0?	3	A	SCM® Portal 6.5	As explained above, SUS solution comply with the given requirement and supports SAML 2.0 for SSO functionality.
	1.4.20	> If yes, can your product provide single sign on capabilities with other third party applications (Opower, Watersmart, etc)?	3	A	SCM® Portal 6.5	Yes, SUS solution is highly configurable and can provide SSO integration with Opower, Watersmart and other desired applications of BWP.
		Is your product desktop support compliant with the following browsers (describe any known version or other limitations):				
	1.4.21	> Microsoft Internet Explorer (IE 9/Edge or greater)?	3	A	SCM® Portal 6.5	SCM® solution utilizes responsive web design and supports most modern web browsers in the market like Microsoft IE, Mozilla, Safari, Firefox, Opera, Google Chrome and Microsoft Edge etc. with high precision screen resolution compatibility. Under Continuous Improvement Framework, our Research & Development team dedicatedly works on system compatibility for latest browser versions and new file formats etc. SCM® portal is compatible with all latest versions of Microsoft Internet Explorer and is periodically updated to accommodate new browser releases.
	1.4.22	> Firefox (Latest version)?	3	A	SCM® Portal 6.5	SCM® portal is compatible with all latest versions of FireFox browser and is periodically updated to accommodate new browser releases.

Appendix B - Business Requirements

Original Ref #	Ref #	Requirement Description	Priority	Vendor Response (A, B, C or D)	Product (Module) & Version	Reference/ Comments
	1.4.23	> Google Chrome (Latest version)?	3	A	SCM® Portal 6.5	SCM® portal is compatible with all latest versions of Google Chrome browser and is periodically updated to accommodate new browser releases.
	1.4.24	> Safari (version 8 or greater)?	1	A	SCM® Portal 6.5	SCM® portal is compatible with all latest versions of Safari browser and is periodically updated to accommodate new browser releases.
	1.4.25	> Others (define)?	3	A	SCM® Portal 6.5	In addition, SUS solution is compatible with Mozilla, Opera browser to support customer devices. With our mission and philosophy to provide comprehensive customer engagement solution to energy consumers, SUS strive to address all dynamic needs of industry including latest technology, web browser compatibility, feature enhancements, Change request etc.
	1.4.26	If your product supports Web access, does your product support a Secure Socket Layer with 128-bit encryption?	3	A	SCM® Portal 6.5	<p>Yes, SUS solution provide secure socket layer with 128-bit encryption. Data transfer and management protocols of SUS ensure security and confidentiality through following security layers:</p> <ul style="list-style-type: none"> • All data is either exchanged over SSL or using Secure FTP. • SCM® Application uses AES 128/256 bit encryption to store sensitive data in database. • Data exchange between Server and mobile/web clients are encrypted using 128/256 bit AES encryption and SSL is used for additional security layer. • SUS does not share any customer data and strictly uses for proposed application. • Old achieved data is shared with utility and deleted beyond archival policy. • Token based authentication is used for web services. • All application and database servers are behind firewall in DMZ and are accessible via proxy and load balancer. • Our solution is frequently tested and meets OWASP top 10 requirements. • Intrusion Detection: Process monitors for security events involving the underlying infrastructure servers, storage, networks, and information systems. The goal of this process is to identify security incidents and respond to it proactively.
	1.4.27	Does your product support a front-end web server residing in a Demilitarized Zone (a Demilitarized Zone Network is an isolated network that is separated by firewalls from the Internet and from the City's internal network)?	3	A	SCM® Portal 6.5	<p>SUS solution comply with given requirement. SUS consider data security as a top priority for its Utility customers and support a front-end web server residing in a Demilitarized Zone. All SUS application and database servers are behind firewall in DMZ and are accessible via proxy and load balancer.</p> <p>SUS has strict security policies in place for Physical hardware security, Software application security, Secure end-user authentication and access, Data transfer and management protocols to ensure security and confidentiality. To meet these standards, SUS has incorporated below principles of defense-in-depth:</p> <ul style="list-style-type: none"> • Authentication and password security • Demilitarized zones (DMZ) • Data-centric security • Encryption • Firewalls (hardware or software) • Hashing passwords • Intrusion detection systems (IDS) • Logging and auditing • Multi-factor authentication • Vulnerability scanners • Virtual private network (VPN) • Sandboxing <p>SUS will meet all your security guidelines.</p>

Appendix B - Business Requirements

Original Ref #	Ref #	Requirement Description	Priority	Vendor Response (A, B, Cor D)	Product (Module) & Version	Reference/ Comments
	1.4.28	There is a need to exchange electronic transactions between the utility and the bank currently used for banking services. Does your product ensure that financial transactions on the web server are secured?	3	A	SCM® Portal 6.5 (Billing module)	Our portal as well as mobile applications use multilayer encryption measures and ensure customer privacy meeting PCI-DSS compliance standards. The SUS solution is compliant with standard regulatory security controls and policies for third party integrations and the payment processing. SCM® platform on Integration with the third party is operational with high speed performance 24 hours a day, 7 days a week, 365 days a year, inclusive of holidays. We maintain a minimum of 99.9% uptime with 100% uptime over the past three years. With SCM® portal, BWP customers will have complete visibility to their monthly utility bills, billing / payment history and can make one-time or scheduled payments in three simple & easy steps. The application provides different payment modes like credit card, bank debit card, net banking and allow customers for complete or partial payments as per the choice of the customer. This feature is available in the "Billing module" which also let customers to download their bill and payment acknowledgments in PDF format. The SCM® platform is pre-integrated with leading payment vendors and Includes interface to integrate with any payment vendor to submit real-time payment information and post real-time payments to customer accounts. All payment transactions are posted real-time to the CIS system to update the balance on account using web service based integration.
	1.4.29	Does your product ensure that credit card numbers and bank account numbers are not stored on the web server?	3	A	SCM® Portal 6.5 (Billing module)	SCM® solution meets the requirements of PCI DSS, HIPAA and CJIS standards. SCM® application does not store any payment details with in its database, it simply pass-through to specific payment provider.
	1.4.30	Does your Web solution provide the ability to include hyperlinks on a page to direct customers to other related sites?	3	A	SCM® Portal 6.5	SCM® modules incorporate hyperlinks on webpages to direct users to other related sites e.g. utility corporate website, payment interface, cross-promotional websites, print options etc. Also SCM® portal PDF hyperlin for users to download bill/invoice in PDF format. The BWP customers can download financial history and consumption data into PDF, CSV, XML, or Excel.
	1.4.31	Does your product offer the ability to clone the software stack with one click?	3	A		Yes, this capability is included in the proposed software.
	1.4.32	Does your product have provide sufficient level of concurrency for 15,000 sessions at a time?	3	A	SCM® Portal 6.5	SUS implementation team performs thorough Network & Integration testing, load testing at all critical stage of development to ensure sufficient level of concurrency for defined mlnimum and maximum concurrent sessions. SUS solution will comply with agreed SLA's for this engagement.
	1.4.33	Does your product offer the ability to archive software and data without writing code, using configuration?	3	A		Yes, this capability is included in the proposed software.
	1.5.	Marketing/Energy Efficiency				

Appendix B - Business Requirements

Original Ref #	Ref #	Requirement Description	Priority	Vendor Response (A, B, C or D)	Product (Module) & Version	Reference/ Comments
	1.5.1	Does your product provide internal reports that can identify irrigation violators based on configurable criteria (ex. X gallons per hour on Tuesday and Saturdays between 9am - 6pm)?	3	A	SiQ® Portal (Admin module)	<p>SiQ Portal provides real-time analytics for water use, conservation metrics, leakage analytics, and water schedule monitoring and violations to Utility staff. The admin interface will deliver a web-based dashboard to monitor water customers' usage, historical water consumption data, track violations, water allocation calculations and usage tracking by customer segment, reporting of account level usage metric by segment type, identify water anomalies, automation of water waste reporting, mobile field investigations, track water use efficiency metrics, flow analysis etc.</p> <p>The Violation module provide functionality to track water restriction violation complaints based on configured criterias. It allows the utility to take action against the violator and send the complaint for investigation, send warning notice or impose penalty. It also provide the ability to track violation history, view complaints in geospatial view and functionality to export data to Excel, PDF. The BWP staff will be able to view tracking and historical reporting of metrics on complaints , action taken, and warnings administered and provide a list of potential violators using various parameters.</p>
	1.5.2	Does your product provide internal analytics reporting?	3	A	SiQ® Portal (Admin module)	<p>SUS provides an in-built analytics engine with extensive reporting & analytics dashboard capability for its Customer Engagement solution that can query system tables to create printed and graphical electronic reports where users can select multiple parameters and sort customer analytics data as per need. SCM® in-built analytics tools provide insights for customers, utility employees, field workers and admin level users related to energy usage, service request, billing information, customer account details, conservation programs, outages, etc. which can be configured as per Utility current and future reporting requirements. The BWP staff can run multiple reports on pre- build business rules and can configure via admin portal for ad-hoc reporting.</p> <p>SCM® platform provide pre-packaged Customer Service BI/Analytical reports based on Utility's customer services workflow and operational KPI's. These analytical reports will address key business process and operational matrix related top customer behaviors, usage analysis, billing and payment reports, Energy Efficiency analysis, customer analysis/ activity, Notifications/Alerts received etc.</p> <p>Our solution also analyze usage trends corresponding to various energy efficiency programs run by the utility enabling Utility to view insights about customer usage along with program or saving tips recommendation leading to increased savings. We have listed some of these pre-build customer service reports for reference and we ensure to accommodate any client customization during our workshops. These reports can be available online as well as in printed form.</p> <ul style="list-style-type: none"> • Billing Analysis • Usage Analysis • Outage Report

Appendix B - Business Requirements

Original Ref #	Ref #	Requirement Description	Priority	Vendor Response (A, B, C or D)	Product (Module) & Version	Reference/ Comments
	1.5.3	>Portal statistics (number of log ons, most visited pages, etc.)	3	A	SiQ® Portal (Admin module)	Our solution track complete behavior of the user such as number of users logged in, average time spent, number of clicks on each page, most visited page and many more. The report helps to discover how customers interact with the utilities' application. The performance can be evaluated with the number of clicks made by the customers on iOS, Android and Web etc. The components of this report can be customized to accommodate all scenarios in Utility's customer services workflow and operational KPI's. These reports can be exported and downloaded in excel or PDF format.
	1.5.4	>Customer usage (highest water users, highest electric users)?	3	A	SiQ® Portal (Admin module)	The admin module enable utility staff to generate Usage analysis reports to keep track of customers' total consumption, analyze highest and lowest usage customers in a particular zip area. The Usage Analysis Reports designed to help utility companies to gain deep understanding of the customer's usage behavior. Detailed information and trend analysis of the present and historical consumption pattern of customers can be analyzed to derive valuable insights to target customers.
	1.5.5	>Financial reports such as sales based on a discreet date range?	3	A	SiQ® Portal (Admin module)	Yes the financial reports can be setup based on user defined date ranges.
	1.5.6	>Energy savings based on configurable criteria?	3	A	SiQ portal	The SiQ portal provides utility the analysis on customer energy (Water & Power) savings based on various criteria. It also evaluates program performance and effectiveness in order to save energy or water. The module allows energy managers identify customer behavior based on their energy usage and configurable attributes such as household type, demography etc. Utility staff will have the option to notify targeted customers for efficiency programs leading them to better savings while improving the efficiency of program managers.
	1.5.7	>Water savings based on configurable criteria?	3	A	SiQ portal	The SiQ portal provides utility the analysis on customer energy (Water & Power) savings based on various criteria. It also evaluates program performance and effectiveness in order to save energy or water. The module allows energy managers identify customer behavior based on their energy usage and configurable attributes such as household type, demography etc. Utility staff will have the option to notify targeted customers for efficiency programs leading them to better savings while improving the efficiency of program managers.

Appendix B - Business Requirements

Original Ref #	Ref #	Requirement Description	Priority	Vendor Response (A, B, C or D)	Product (Module) & Version	Reference/ Comments
	1.5.8	Does your product provide users with comparison reports, where a user is compared to a configurable customer base (ex. Household size, zip code, property attributes) for both water and electric services?	3	A	SIQ portal and SCM® Portal 6.5	<p>Our Admin interface fulfills this requirement and enables Utility to compare the usage of target and control group providing insights about the savings of the target group that indicates the performance of home water and electric reports received. The admin module of SCM® portal provides utility staff the ability to compare the amount of gallons/KWH units saved by the target customers versus control group (configurable customer base). This comparison is done taking into consideration various factors and parameters which can be customized as per the requirements of BWP.</p> <p>We utilize a combination of property attributes and other socio-economic factors to aggregate customers into control groups and target groups. To select participants, we can filter customers by census tract within BWP footprint to normalize across different property segments that have a matching record with details about the home, such as household size and value. Once participants are selected, we typically use the randomization process using "batch" assignment where customers are randomly assigned to the control groups in batches of census blocks. The customers are then divided into control groups. We use this assignment methodology to increase the likelihood that neighbors would receive reports and have the opportunity to discuss the reports with each other, thereby increasing the motivation for taking actions to reduce water and electric usage. All members of the control group receive water and electric reports on a periodic basis.</p>
	1.5.9	Does your product offer Marketing/Rebate offers based on specific customer segmentation (commercial, residential, TOU, etc)?	3	A	SCM® Portal 6.5 (Efficiency module)	<p>SUS understands the importance of Marketing/rebate offers in all customer interactions i.e. effective utilization of moment of truth for higher customer outreach, adoption, retention, achieve greater customer awareness thereby providing revenue generation opportunities for utility. SUS has delivered award winning Customer Engagement programs at Electric and Water utilities. Our analytics platform, provides utility program managers the visibility into their customers and targeted and personalized outreach marketing campaigns.</p> <p>The Efficiency module of SCM® portal provides interface that connects utilities and consumers by offering energy-saving household products and services with instant rebates. Its goal is to empower customers to reduce energy consumption and make informed purchasing decisions by delivering individualized energy-saving tips and recommendations. Our solution is highly intuitively and customizable providing details about various energy efficiency products using integration with various major retailers making it a one stop shop for the customers and enabling them to select the optimum product based on their usage and TOU rates and as recommended by the utility.</p> <p>Utility rebates are constantly reviewed and displayed on Efficiency module, in order to engage the customers. It provides an easy to navigate user interface to analyze, select and buy the energy saving products. Following are the value added benefits for our Marketing/Rebate services:</p> <ul style="list-style-type: none"> • A large number of energy saving products from numerous vendors are available on a single portal for the customers. • SCM® analyze the usage and billing patterns and recommends the best fit product for the customer.

Appendix B - Business Requirements

Original Ref #	Ref #	Requirement Description	Priority	Vendor Response (A, B, C or D)	Product (Module) & Version	Reference/ Comments
	1.5.10	Does your product support a "tip library" that provides users configurable conservation tips based on customer segmentation?	3	A	SCM® Portal 6.5 (Efficiency module)	This requirement is addressed by Efficiency module of SCM portal that provides a tab for educational tips to save more energy and water. these tips are accompanied with savings expected by following the specific tip. The Efficiency module of the SCM® portal support establishment of savings goals for customers based on prior usage. The utility customer can view and register for various rebates, conservation programs, educational tips, savings tips etc. in order to save more energy. Based on opted programs, system sets saving goal for the customer and provide real time performance of customer on his saving energy as compared to benchmark groups. It provide personalized recommendations for rebates, programs that could lead to more energy savings by the customer.
	1.5.11	Can your product provide reporting based on water consumption behavior in comparison to a given baseline year (California Governor mandate)?	3	A	SiQ® Portal	SiQ® Portal fulfills this requirement and provides reporting based on water consumption behavior in comparison to a given baseline year (California Governor mandate)
	1.5.12	Can your product demonstrate Energy savings that are acceptable to meet regulatory requirements to the California Energy Commission (or other regulatory bodies)?	3	A	SCM® Portal 6.5 (Efficiency module)	SUS solution comply with the given requirement. Our proposed SCM® portal has in-built functionalities to demonstrate Energy savings that are acceptable to meet regulatory requirements to the California Energy Commission (or other regulatory bodies).
	1.5.13	Can your product process rebates?	3	A	SCM® Portal 6.5 (Efficiency module)	SUS solution comply with given requirement. As explained in section 1.5.9, our solution process personalized rebates to customers based on defined customer segmentation attributes including Customer Class, Property type, Services etc.
	1.5.14	>If yes, can your product suggest specific rebates based upon configurable segmentation variables (Customer Class, Property Type, Services)?	3	A	SCM® Portal 6.5 (Efficiency module)	SUS solution comply with given requirement. As explained in section 1.5.9, our solution offer personalized rebates to customers based on defined customer segmentation attributes including Customer Class, Property type, Services etc.
	1.5.15	>If yes, can your product restrict offers based on previous rebates received?	3	A	SCM® Portal 6.5 (Efficiency module)	Our solution is highly configurable. SCM® portal will be configured to restrict offers based on previous rebates received. Our systems have inbuilt validations and business rules configured that puts a check on invalid entry or defined content availability when performing daily tasks and moving between various displays. Also utility staff has the rights to monitor and manage all data changes executed at various user-levels.
	1.5.16	>If yes, can your product process the rebate application (customer Information, receipts)?	3	A	SCM® Portal 6.5 (Efficiency) and SiQ portal (Program Management)	The efficiency module of SCM portal allow utility customers to enroll/register for intended rebate programs offered by utility. On submission of request, this application is received by utility staff via admin module for further processing. Through the efficiency module, concerned customer can track rebate application status in real-time. System-generated alerts is received by customer on approval of application.
	1.5.17	>If yes, can your product require application approval?	3	A	SiQ portal (Program Management)	Yes, our solution has in-built approval workflow for all rebate applications for end-to-end monitoring. We can configure the workflow that best suits BWP requirements.
	1.5.18	>If yes, can your product require application approval?	3	A	SiQ portal (Program Management)	Yes, our solution has in-built approval workflow for all rebate applications for end-to-end monitoring. We can configure the workflow that best suits BWP requirements.
	1.5.19	>If yes, can your product provide updates on status to both customers and internal employees?	3	A	SCM® Portal 6.5 (Notification module)	SCM® platform support alerts and notifications across a variety of communication channels, including e-mail, IVR, text message alerts and push notifications. The concerned BWP customers & internal staff will receive status update notification for any changes in the application status. Users have the option to set the frequency and the time period during which they would prefer receiving alerts. The BWP residential and commercial customers would receive the notifications or alerts in the notification module under the specific category.

Appendix B - Business Requirements

Original Ref #	Ref #	Requirement Description	Priority	Vendor Response (A, B, C or D)	Product (Module) & Version	Reference/ Comments
	1.5.20	>If yes, can your product generate a flat file that can be interfaced with Oracle Financials E-Business Suite?	3	A	SCM® Portal 6.5	SUS solution will comply with given requirement.
	1.5.21	>If yes, can your product provide statistics on rebate programs such as rebates approved, types, and other configurable criteria?	3	A	SiQ portal (Program Management)	SUS solution will comply with given requirement and provide detailed report on rebate programs in the SCM admin portal.
	1.5.22	>If yes, can your product provide reports on savings (energy and water) that have been achieved based on customer rebate participation at both the customer level and customer segmentation (commercial, single-family residential, multi-family residential) level that can be submitted to satisfy regulatory requirements?	3	A	SiQ portal (Program Management)	The Utility facing SiQ portal provides utility staff the ability to access the summary of reports on savings (energy and water) that have been achieved based on customer rebate participation at both the customer level and customer segmentation (commercial, single-family residential, multi-family residential) level that includes program statistics including number of customers enrolled, period of participation, analyze the target customer consumption, savings data, etc. For each customer, BWP staff can view the corresponding consumption, percentage savings, duration of each program, customer details, and gallons or kwh saved. This data can be filtered for different customer segments like i.e., residential, commercial, and industrial, etc among others. A detailed report in tabular and graphical format can be viewed in the same screen with top customer savings per billing period. These analytical reports will provide an enhanced view of program statistics to BWP taking into account certain factors like rainfall and temperature thereby representing customers overall usage for that duration.
	1.6.	User Experience		A		
	1.6.1	Does your product offer the user a contemporary look and feel?	3	A	SCM® Portal 6.5	SCM®, the industry leading #1 customer Engagement Web and Mobile Platform is designed keeping in mind the end customer requirements. The solution has easy to use interface which require minimal steps for customers to navigate within the modules and provides the most intuitive user experience. The utility and its customers have the easy access to the platform which can be accessed anywhere, anytime and on any device. The user interface of SCM® is interactive and dynamically adjusts based on user input and increases the user adoption rate with its active responsive design. SUS also understands the importance of Utility branding across all customer interactions and will implement the SCM® application, training and marketing material using BWP logo and color scheme to maintain the consistency with BWP company website so that it is seamless for your customers. SUS is confident to meet all your branding needs. The SCM application is highly configurable and can easily incorporate working links to BWP main website. The agreed BWP styling will be replicated across all platforms such as IOS, Android and Web browser so that we maintain the consistent look and feel on all devices.

Appendix B - Business Requirements

Original Ref #	Ref #	Requirement Description	Priority	Vendor Response (A, B, C or D)	Product (Module) & Version	Reference/ Comments
	1.6.2	Does your product offer the user fluid navigation that allows for easy usability?	3	A	SCM® Portal 6.5	<p>SCM®, web and mobile platform is designed keeping in mind varied educational & professional background of end customers and internal Utility staff. The solution has easy to use interface, with self-explanatory field labels, terminologies used, which require minimal steps for customers to navigate within the modules and provides the most intuitive user experience. SCM® customer portal has been proactively designed to make it most user-friendly and responsive UI with easy to understand labels and content. The content and the design used is highly simple and would be finalized with the approval of BWP.</p> <p>SUS proactive and continual improvement approach enabled our platforms to be ADA compliant. Various design features, GUI controls, audio/video support are available for people with specific vision, hearing needs.</p> <ol style="list-style-type: none"> 1. Display the whole user interface in a large font without truncating display text or other values. 2. Use a screen magnifier (to magnify a selected part of the screen). 3. Use a screen reader (to read aloud information displayed). 4. Discern all text and other information displayed for a color blind person as easily as person without color blindness. 5. Avoid visual constructs that are apt to cause eye strain after hours of continuous use. Such constructs include flashing visual objects, low contrast between adjacent objects (such as text and its background), and bright colors.
	1.6.3	Does your product address consumer insights as to display preferences?	3	A	SCM® Portal 6.5 (Admin module)	<p>Our solution is packaged with SCM® Admin Portal that provides executive dashboards and real time information on user behavior, customer preferences and other key process indicators that enable our utility clients to manage their business more efficiently. SCM® solution tracks all user activity and provide configurable option to monitor user behavior. The admin portal will enable BWP staff to view related transactional data. Based on BWP requirement, we can provide canned reports and executive dashboards for all levels of management to gain access and review the most current data. This report will list the complete behavior of the user such as preferred mode of communication, marketing preferences, number of users logged in, average time spent, number of clicks on each page, most visited page and many more. The components of this report can be customized to accommodate all scenarios. The reports can be exported and downloaded in excel or PDF format as desired by Utility staff.</p>
	1.6.4	Does your product support mobile access (e.g., Blackberry, iPhone, etc.)?	3	A	SCM® Portal 6.5	<p>Our SCM® solution provides native mobile apps for Blackberry, iPhone, iPad, Android Phone and Android tablets. The mobile as well as the desktop app is fully functional and configurable for utility and its customers. For enhanced usability and customer experience we have specifically designed for the standards and dimensions of mobile browsers.</p>

Appendix B - Business Requirements

Original Ref #	Ref #	Requirement Description	Priority	Vendor Response (A, R, C or D)	Product (Module) & Version	Reference/ Comments
	1.6.5	Does your product have a "help" option that gives users tips on using the portal?	3	A	SCM® Portal 6.5	<p>We will provide detailed online user guide / help manuals in SCM® portal to BWP users which acts as a self-help forum that will include the complete workflow of the system. The step by step flow will be defined in the document starting from the login page covering all the modules. The simple navigation and the summary of each module which help BWP and its customers the ease to access the portal. We can also provide single page job aids or cheat sheets for BWP employees and administrative staff. Moreover, we also provide a FAQ section in SCM® Customer Portal Application which lets users to get answers to all the common queries faced by them while using the application. All the listed questions and answers that are supposed to be commonly used in some context and pertaining to a particular topic are included in this section.</p> <p>Also we provide small training videos via SCM® portal that cover various business processes and enable the users to navigate application without dependency on Utility staff. In addition, our SCM® solution provides 24/7 online help for end users:</p> <p>Live Help: We offer live help feature in SCM® for enabling efficient help from our application to BWP customers. This will let the BWP staff to chat with remote customers throughout the support session. Customers also have the ability to download the session recording and chat transcripts for their records.</p> <p>24/7 Online Support: SUS provide live 24/7 online support to utility customers. Customers can anytime connect with utility via 'Support' feature. As customer requests for support, a session code will be generated for customers which will allow customers to connect with their utility. Along with this, SCM® also provides user the ability to live chat with utility Customer Service Representative (CSR). Customer can initiate a live chat session and communicate with utility CSR with and without logging into the application.</p>
	1.7.	Mobile Apps		A		
	1.7.1	Does your product provide a mobile "App" that is available on the IOS or Android (Google Play) store?	3	A	SCM® Portal 6.5	<p>SUS solution provide native mobile application for iPhone, iPad, Windows, Android Phone and Android tablets to access SCM® portal. In addition, we provide utility customers with a single responsive website that works on all modern mobile browsers. Consistency is maintained across Web, Mobile and Tablet version in terms of features, functionality, field labels, color schema, self-explanatory terminologies, access rights etc. SCM® mobile application exhibit:</p> <ul style="list-style-type: none"> • Availability & Consistency: This application will be downloadable from various popular mobile stores including Android Google Play store and IOS app store. Additionally, application features does not vary between Web & Mobile customers. • User Interface: For enhanced usability and customer experience we have specifically designed UI compatible with the standards and dimensions of mobile browsers. • Fully-Secured Solution: HTTP protocol is used to support mobile application. All communication between SCM® Mobile application and backend system goes through proxy services to avoid opening firewall and secured using encryption, token and TLS. <p>BWP staff and your customers will have easy access to the mobile interface which can be accessed anywhere, anytime and on any mobile device.</p>

Appendix B - Business Requirements

Original Ref #	Ref.#	Requirement Description	Priority	Vendor Response (A, B, C or D)	Product (Module) & Version	Reference/ Comments
	1.7.2	Does the mobile app support all the features the Web app supports?	3	A	SCM® Portal 6.5	Yes the mobile app supports all features that the web pages support including the branding and look and feel in order to maintain consistency across all platforms. Consistency is maintained across Web, Mobile and Tablet version in terms of features, functionality, field labels, color schema, self-explanatory terminologies, access rights etc. The application features does not vary between Web & Mobile customers.
	1.7.3	Does your solution provide TLS 1.2 support?	3	A	SCM® Portal 6.5	<p>Yes, SUS solution provide TLS 1.2 security layer support for privacy and data integrity during data exchange. Our industry leading security team provides comprehensive security testing at device, application, and network and infrastructure level. In addition to TLS 1.2, SCM® application provides following security layers:</p> <ul style="list-style-type: none"> • SCM® Application uses AES 128/256 bit encryption to store sensitive data in database. • Data exchange between Server and mobile/web clients are encrypted using 128/256 bit AES encryption and SSL is used for additional security layer. • Token based authentication is used for web services. • All application and database servers are behind firewall in DMZ and are accessible via proxy and load balancer. • Our solution is frequently tested and meets OWASP top 10 requirements. • Intrusion Detection: Process monitors for security events involving the underlying infrastructure servers, storage, networks, and information systems. The goal of this process is to identify security incidents and respond to it proactively.
	1.7.4	Is your solution HTML5 compliant?	3	A	SCM® Portal 6.5	SCM® web application is HTML5 compliant and built using the following languages and frameworks: Microsoft .Net Framework 4.0, C#, XCode 6, Android Studio/SDK 5.0, HTML4/5.
	1.7.5	Does your solution provide native mobile app support (i.e.. iOS, Android, Windows Phone, etc.)?	3	A	SCM® Portal 6.5	SUS solution provide native mobile application support for iPhone, iPad, Windows, Android Phone and Android tablets to access our proposed SCM® portal. Please refer our response to section 1.7.1
		Is the solution compliant with the following smart phones (describe any known version or other limitations):				
	1.7.6	> iPhone iOS?	3	A	SCM® Portal 6.5	The IOS firmware versions supported by SCM® portal – iOS 7 and above.
	1.7.7	> Android?	3	A	SCM® Portal 6.5	The Android firmware versions supported by SCM® portal – Android 4.0 and above
	1.7.8	> Windows/Google?	3	A	SCM® Portal 6.5	The Windows firmware versions supported by SCM® portal– Windows 7/8/8.1/10.