



Solution Brief

Utilities Customer Care and Billing Edition



 **Pitney Bowes**
Business Insight

ORACLE
UTILITIES

Pitney Bowes Business Insight Utilities Customer Care and Billing Edition

Oracle Utilities Customer Care and Billing Solution

The requirement for operational excellence in the utility industry continues to grow. Customers demand higher service levels, and stakeholders—whether they are taxpayers or shareholders—expect greater financial performance. Wringing costs from your operation at the same time you're improving service seems contradictory at best. But do you have a choice? The marketplace says you don't.

Fortunately, you can meet these conflicting goals with an end-to-end solution from Oracle® Utilities and Pitney Bowes Business Insight®. By combining the strengths of these two large, multi-national organizations, you benefit from an integrated solution that can lower your operating costs while improving your customer satisfaction. Together, we have extensive experience in the utility industry, serving hundreds of customers during the past 25 years. Because of our background, we can immediately and dramatically improve the effectiveness of your billing, customer care and print/mail operations whether you serve a small rural population or a thriving metropolis.

Oracle Utilities Customer Care and Billing (formerly SPL® Customer Care & Billing) handles every aspect of utility customer information—service connection, meter reads, rating, billing, and more—while also undertaking associated functions like payment processing, collections, field service, and meter data management. Oracle Utilities Customer Care and Billing clients reliably meet market requirements and regulatory deadlines while enjoying a lower total cost of ownership and a high return on investment.

The Utilities Customer Care and Billing Edition from Pitney Bowes Business Insight (PBBI) is the perfect complement to the Oracle Utilities Customer Care and Billing Solution. This Edition is part of Pitney Bowes Business Insight's large selection of solutions to manage Customer Communications. The Pitney Bowes Business Insight Utilities Customer Care and Billing Edition manages all aspects of communication with the Utility customer, including billing document creation, mailing, and storage. It allows you to create sophisticated billing documents, field

orders and customer letters with little design or development effort on your part. Pitney Bowes Business Insight Utilities Customer Care and Billing Edition helps clients improve customer service, increase cash flow, and save operational costs.

The Pitney Bowes Business Insight Utilities Customer Care and Billing Edition is the most comprehensive set of Utility document tools available in the industry today. We have industry leading solutions for mail sorting, address validation, document creation – storage – retrieval, customer service, and tax jurisdiction management. This one stop solution source eliminates the need for you to shop around or manage a variety of vendors. It makes your job easier and your business more effective.

This Solution Brief describes the key components of the Pitney Bowes Business Insight Utilities Customer Care and Billing Edition and how they benefit you. Our pre-sales, sales and service professionals can help you configure the system to meet your specific requirements. Please contact us today so that you can begin enjoying the benefits of this powerful partnership.

Utility Billing Challenges

Here are some of the daily challenges our utility customers have shared with us. We're sure you can relate to many of these challenges faced by your peers.

Improved Service

"Our bills are hard to read. We need a better layout, more information and easier ways for our customers to pay."

"Our customers are asking to have access to their bills from the Internet. They want to review them, reprint them and pay them online. We don't have the resources or technology to provide this service."

"We want to use our bills to communicate with our customers and to include personalized messages on those bills for a single customer or a selected group."

"Our Customer Service Reps need immediate access to our bills and they need to look exactly like the ones our customers receive. These documents need to be accessible as soon as the billing cycle is complete."

Cost Reduction

"We need to find a way to meet the USPS® DPV® (Delivery Point Validation) regulations, effective August 1, 2007."

"Our call volume into Customer Service has increased and the call handle time has stayed the same. We've got to find ways to reduce our calls and improve our CSRs' productivity."

"How can we provide customer-focused documents and improved customer care without incurring a large capital outlay?"

Compliance

"The government requires us to ensure that we have deliverable addresses on our bills. If we can't prove that, we have no recourse if the customer doesn't pay their bill."

"Sarbanes-Oxley requires us to provide proof that bills were mailed and to tie our revenue to the bills we produce. How are we going to do that?"

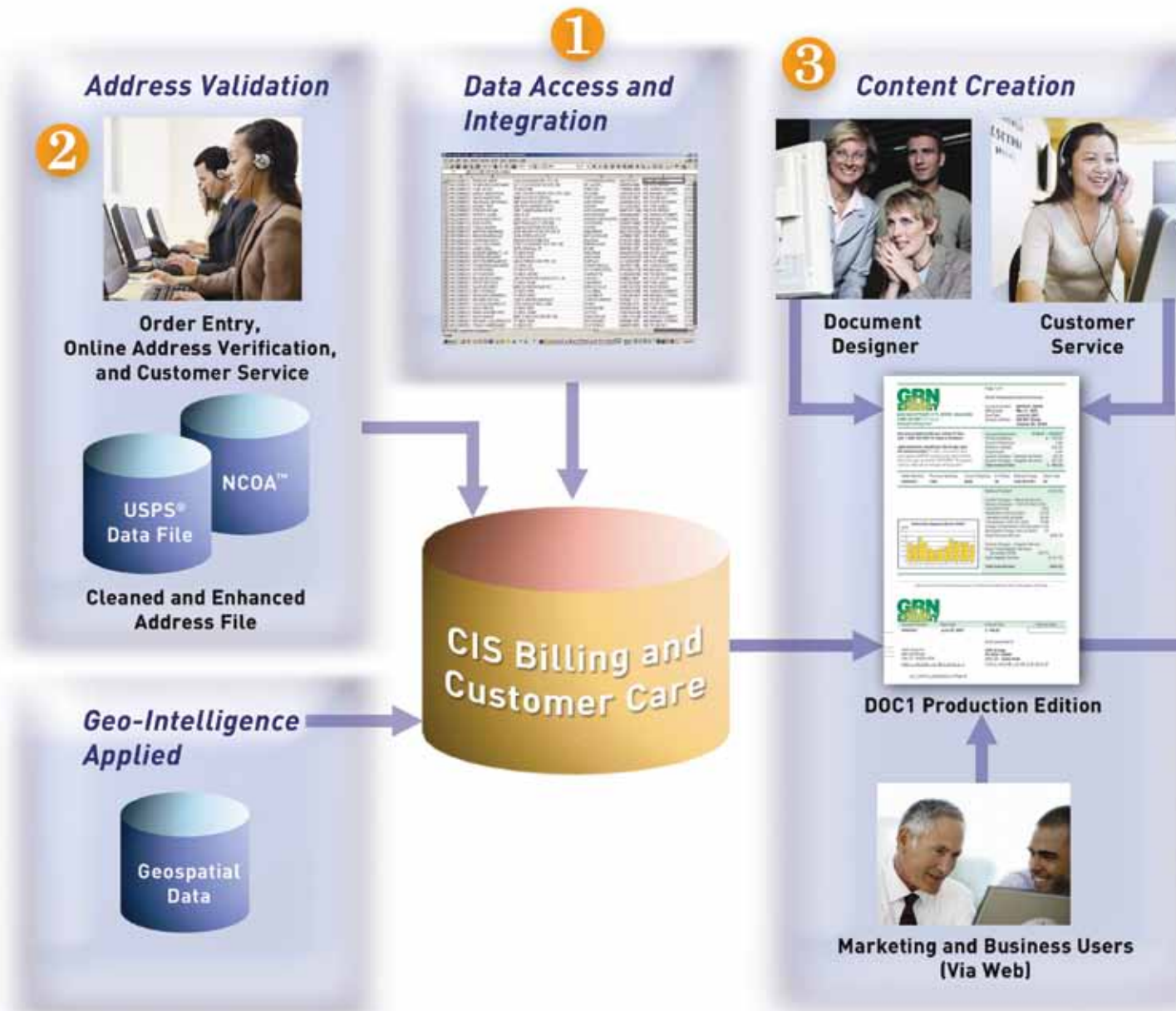
"We need to accurately figure out the sales and other taxes that are due. ZIP Codes® and municipal boundaries are not accurate enough. How can we ensure that the taxes are properly calculated?"

Oracle Utilities and Pitney Bowes Business Insight are poised to help you solve these problems and many more. The rest of this document outlines practical, cost-effective solutions that can save you money, improve your productivity and enhance the service to your customers.

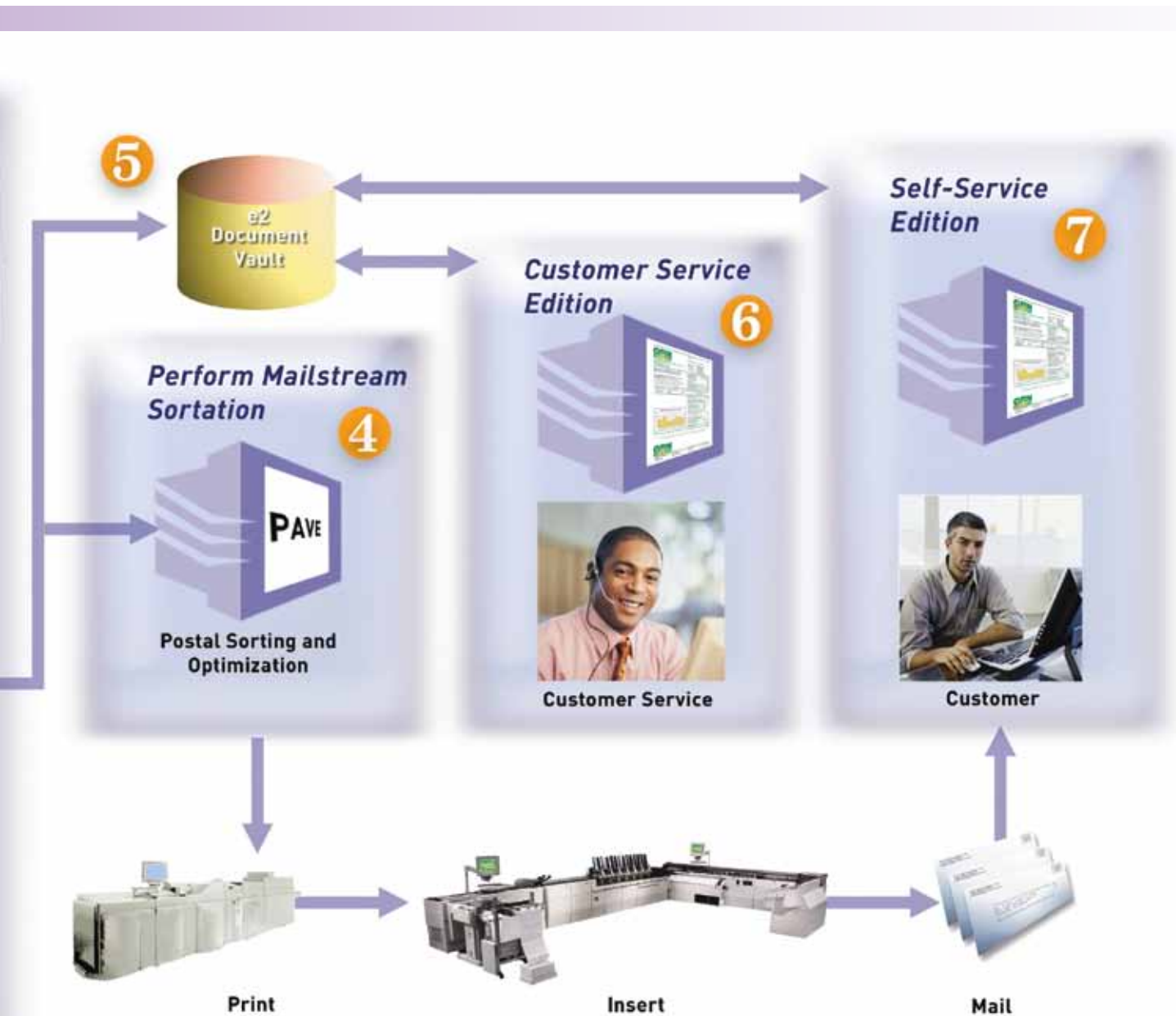


Billing Process Overview

1. The billing process begins by extracting billing and customer records from the Oracle Utilities Customer Care and Billing Solution. This extract process was written to feed Pitney Bowes Business Insight Utilities Customer Care and Billing Edition. After the data is extracted, it flows through a series of steps that correct customer addresses, format (create) the bills and prepare them for mailing and storage.
2. The recipient's address data is validated, corrected and formatted. The system performs Delivery Point Validation, which ensures that the billing address is deliverable, a requirement of the United States Postal Service® as of August 1, 2007. This step also ensures that all of the information necessary to qualify for the maximum postal discounts is available.
3. Address and billing information is fed to Pitney Bowes Business Insight' DOC1 document composition program. DOC1 generates bills using the sophisticated formatting templates of the Edition, which define the business rules and layout for each of your billing customers.



4. Bills are presorted to calculate postage discounts according to the current postal regulations. This step also produces the reports which the Post Office requires for bulk mailing discounts.
5. The e2™ Vault is a highly efficient electronic document repository from PBBI that allows immediate access to exact replica Bills, Field Orders, or Customer Letters.
6. Using the e2™ Customer Service Option, customer service representatives can retrieve and view the documents on-line, generate a PDF version to send out via email, or reprint the document to send in the mail. While viewing the information on-line, representatives can view a single bill or the entire billing history for a given customer.
7. Customers can also access their bills on-line using the e2™ Self-Service Option. Once logged on, they can make secure payments by ACH or credit card if you choose this optional feature.



Special Bills

Not all utility bills are created equal. Some have unique handling requirements. In step 3, on the previous page, special handling bills are split into four different groups:

- *Foreign Addressed Bills* do not qualify for postal discounts and may have special address and postage requirements. Even if you don't have customers in foreign countries, you may have a billing address for residential customers who are temporarily or permanently living in a foreign country, or have commercial customers whose headquarters or billing address is in a foreign country.
- *Bills With Credit Balance* may or may not be sent to the recipient, depending on your policy or on the recipient's instruction. In either case, these bills are separated from the mainstream process for manual handling.
- *Bills for Customer Service Review* have been flagged in the Oracle Utilities and Customer Care Billing System for special handling. These special handling circumstances can vary significantly by customer but can include bills that are complex, final bills, bills where the customer has had a significant number of service changes or bills for customers that have had billing complaints over the past several months.
- *Oversized Bills (more than 6 pages)* are a special class of bills that typically cannot be handled by an automated inserter or don't fit into a #10 envelope and need to be mailed as flats.

Processing for each of the special handling circumstances is based on our experience with other utilities. Each of these exceptions may not apply to your operation, but it's nice to know that these common exceptions are built into the solution and won't cost you any more or delay the launch of your new customer-focused bill.

Additional Utility Documents

The business process required for two other important utility documents, **Field Orders** and **Customer Letters**, follow similar steps. As with bills, records for these documents are extracted from the Oracle Utilities Customer Care and Billing System, sorted and then sent through the DOC1 document formatter to produce the final documents. On a custom basis, Pitney Bowes Business Insight can help you create templates for other documents like quotations, contracts, statements, or service literature used by your sales and support teams.

As you generate Bills, Field Orders, or Customer Letters, the system produces audit logs that track each step in the process for every document that you generate. You can use these logs for troubleshooting or as a permanent record of your document production process—very helpful in meeting compliance requirements. Pitney Bowes Business Insight system also produces comprehensive audit logs and tracking reports that can be used by public companies for Sarbanes-Oxley Compliance.

There are numerous other features embedded throughout this comprehensive process. PBBI's GeoTAX® Reporting allows you to precisely locate your customers so that you can assess the correct sales taxes for a given location. The Multi-Language Capability allows you to produce bills in several languages. CSRs and customers can access bills online and they look just like the bill you sent them.

These features and more make the combination of Oracle Utilities Customer Care and Billing Solution and Pitney Bowes Business Insight Utilities and Customer Care Billing System the industry leader.

Utility Document Templates

Tap into the power of the Oracle Utilities Customer Care and Billing System and the Pitney Bowes Business Insight Utilities Customer Care and Billing Edition

For most customers, their bill is the only thing they see (or pay attention to) from you, their utility provider. It not only tells them how much to pay, it documents their service usage, provides contact information for customer service, and includes a remittance coupon for paying the bill. But your bill can do much, much more. You can re-design the bill to provide more information such as bar graphs of historical usage, include informative messages, make payments easier, or improve your branding. But creating a new bill can be a time-consuming and frustrating process.

Pitney Bowes Business Insight, in conjunction with Oracle Utilities, has created a template-based utility billing solution that can get your organization's new, customer-focused bill up and running quickly. Our experience with dozens of utilities and over 1500 hours of development went into creating easy-to-navigate document layouts, with the flexibility to meet your most demanding requirements. These templates significantly reduce the development and testing typically required to bring a new bill to market. You'll also find that these bill formats can significantly reduce calls to your customer service team. And finally, you can use paper more efficiently by eliminating those costly, pre-printed forms and by printing on both sides of your new blank billing paper.

There are three document templates in the Pitney Bowes Business Insight Utilities Customer Care and Billing Edition: **Bills, Field Order Forms, and Customer Letters**. We'll show you samples of each of these and makes suggestions on how you can use these powerful templates to improve your operational excellence.

DOC1 Data Feed and Billing Preview

Improve Data Flow Throughout the Entire Billing Process

As you implement an Oracle Utilities Customer Care and Billing System, you appreciate anything that reduces the project's complexity. To improve the data flow between the various components of the system, Oracle Utilities created a data extract for the Pitney Bowes Business Insight document production process. This sophisticated interface:

- Provides predictable and consistent data throughout the billing process. This reduces your time to market by eliminating one of the most troublesome aspects of most systems.
- Makes data extracted from the Oracle Utilities Customer Care and Billing System immediately available in your new bill. Even if you haven't completed the design of your new bill (or maybe you haven't even started it), data can be viewed and printed so that you can verify that the calculations and other critical information is being accurately generated in your system. As you fine tune your bill, you can see how your test data is displayed in the new format. This feature can dramatically reduce the time you spend on design and on testing as you move to production.
- Archives each batch of data generated by the Oracle Utilities Customer Care and Billing System and stores it for future use. If you need to, you can easily recompose a bill for a specific customer and generate a PDF to print or email to your customer.

This feature is another example of the tight integration between Oracle Utilities and Pitney Bowes Business Insight, a partnership in the Utility Billing industry second to none.

The Customer Bill

Design and Content Flexibility Across All Bills or on a Customer-by-Customer Basis – or Both

The following sample bill, from the fictional GRN Energy, shows the five key sections for a bill. The billing template gives you significant flexibility in the statement layout including branding (logo, colors, fonts), service details, promotional messages, and numerous other characteristics.

1. Page Header

This section prints at the top of every page. A complete page header containing your organization's logo, the account name, account number, billing date, due date, and current page number is printed on the first page and a condensed page header is printed on subsequent pages. You can change virtually every item in this section to meet your organization's billing requirements including logo, colors, fonts, phone numbers, or field names.

2. Customer Messages

Customer Messages print immediately below the Page Header on the left side of the two-column format. They print only on the first page of the bill. The system allows you to print a generic customer service message on each bill or to customize the message specifically for an individual customer. These messages can be printed in the primary language for the bill or can be printed in the native language of the customer, your choice.

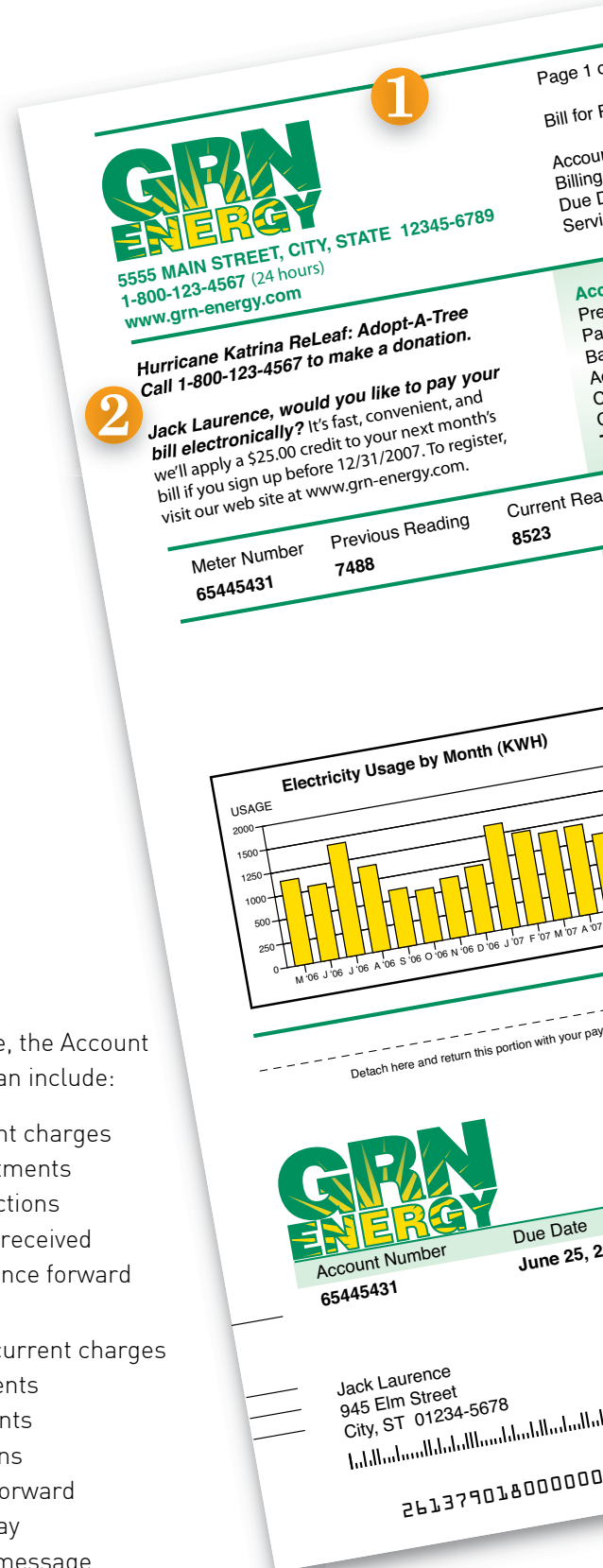
3. Account Summary

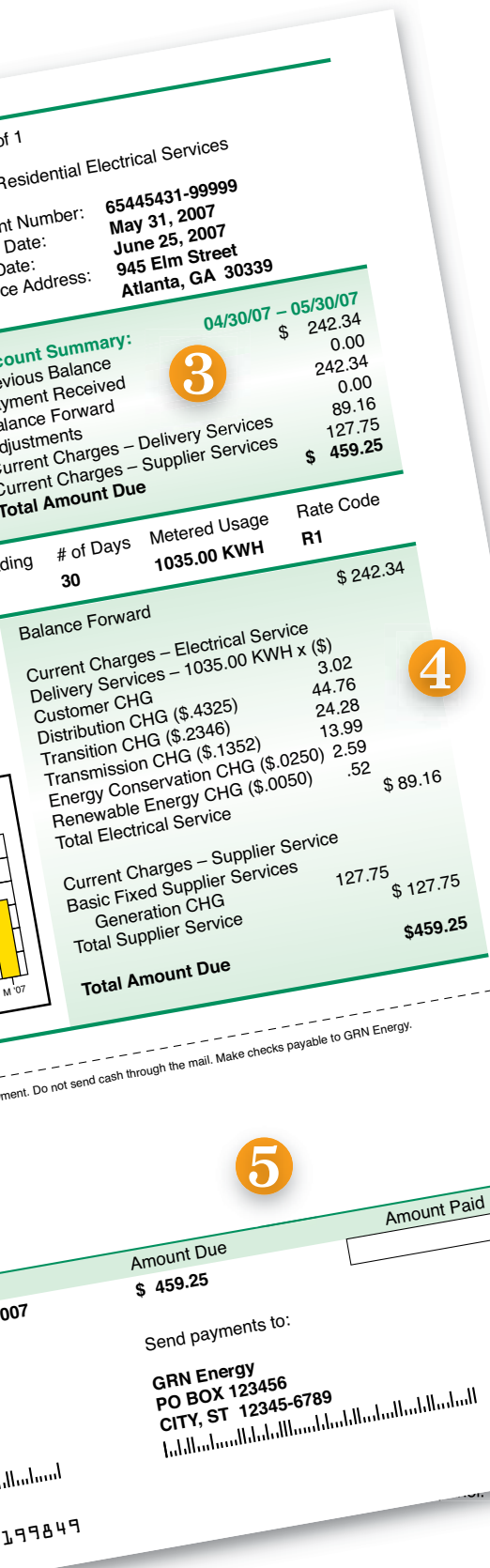
This section prints in the right hand column below the page header and on the first page of the bill. It contains the previous account balance, payments received, unpaid balance carried forward, current charges, adjustments, corrections, current balance, and due date for the current balance. You can create dozens of combinations with the Template by including:

- A single current charge, multiple current charges or no current charge
- Adjustments, corrections, both or neither
- Manual pay, auto pay, or no payment required
- Warning messages (disconnection, for example) or not

For instance, the Account Summary can include:

- No current charges
 - No adjustments
 - No corrections
 - Payment received
 - Zero balance forward
- or...
- Multiple current charges
 - No payments
 - Adjustments
 - Corrections
 - Balance forward
 - Manual pay
 - Warning message





4. Service Details

This critical information prints in the middle of the statement and typically contains details for every service provided to the customer. This section includes the service period, charge components, meter readings, adjustments, and an optional bar chart.

The Service Details section is very flexible. For a residential customer, it's likely that there will be a small number of detail lines that will print on a single page. For a commercial customer, however, there could be hundreds of detail line items from numerous meters or other monitoring devices. You can group these items by service provided, by premise, or by other characteristics. The system easily prints these details across multiple pages.

As with the Account Summary, you have the flexibility to configure the print layout across all customers, for a given customer class (commercial customers, for example) or on a customer-by-customer basis.

5. Remittance Coupon

We designed the payment section to be returned to your organization along with the payment. It prints at the bottom of the first page of the bill. The Remittance Coupon contains a variety of information that assists the customer, your internal mailing operation, and your payment processing operation in efficiently processing bill payments. There are a number of formats available that account for business needs such as cash only, auto pay, and credit balance accounts.

The summarized account information contains the account number, overdue balance, due date for current charges, and total current charges. The system prints the recipient's name, address, and postal Delivery Point Bar Code so that it is visible through a windowed envelope. The customer's return address prints so that it is visible through a windowed return envelope. The system produces a scan line that prints in the OCR-A font to support automation in your remittance processing operation and contain whatever information you need.

You can also customize the back of the Remittance Coupon for your specific needs.

In the event you fail to receive a utility bill, please call (if impaired) 1-555-123-4567.

MasterCard®, Discover®, and American Express®.

Convenience stores equipped with Pay Station, for your convenience, drop boxes are located at [unclear] payments are processed the following business day. [unclear] check or money order.

9 AM – 5:00 PM Monday – Friday

Si no recibe un recibo de GRN Energy y desea hablar con un representante, el número de teléfono es 1-555-123-4567

Field Orders

Improve Your Operational Excellence

The Field Order is a useful tool for dispatching work against installed devices including special meter readings, repair, collections, service outages, new installations, disconnections and other service activities. Your Customer Service Team, Service Managers and other people can generate Field Orders from a number of places within the Oracle Utilities Customer Care and Billing System. After you enter the data, you can produce Field Orders in batch on a daily basis or more frequently if necessary.

The Field Order is composed of some mandatory and some optional sections. Each section contains text (field labels, descriptions, etc.) and unique customer information ranging from account level information to service instructions. The Field Order contains these sections:

1. The **Page Header** is printed at the top of the first page of the Field Order. It contains the scheduled date and time for the work and the dispatch information.
2. The **Basic Information** is the next section on the Field order and contains the Field Order ID, scheduled date and time, account identification, premise warning and instructions, the location and any specific geographic locators as well as any special alerts.
3. The **Service Point** is the location where the actual work will be done. This section of the Field Order includes the service point type, meter location, meter read route and meter read cycle, geographic locators, and service point characteristics. All of the following sections are contained in the Service Point. If there are multiple Service Points, then some combination of the following sections will be present for each Service Point.
 - The **optional Item** or **Badged Item** section consists of the item ID, badge number, installation date, serial number, description, manufacturer, and model number.

GRN ENERGY

1

Field Order

Scheduled Date/Time: 7/8/2007 1:30 PM

Special Customer Alert

Customer is life support equipment dependent – do not disconnect service

2

Account Number: 00283948996

Name: Eastland, Dennis
317 ROLLING OAK DR
Orlando, FL 90001
Mailing Address on Person

Geographic Locators: Subdivision: Turtle Resort Coconut Grove

Premise Warning: DOG Bad Dog

Premise Key: 9283746193

3

Service Point Type: Water Meter

Source Status: Connected

Disconnect: METR, At Meter

Meter Location: CURB, Meter is located at curb

Meter Read Cycle: Monthly

Badge: 0000172839

Meter Type: Water

Manufacturer: WATS Watson

Model: Flow Master Wat-o-Matic

	Read Seq	Read Date	Dia
Most Recent:	1	08/01/2007	5
Previous Readings:	1	07/01/2007	5
	2	06/01/2007	5
	3	05/01/2007	5
Last Year:	1	08/01/2006	

Activity Type: LEAK Water Leak

FA Scheduled Date: 7/8/2007

Step 1. Mandatory — Inspect Meter for Leaks

Step 2. Optional — Replace Faulty Meter

Meter: _____

Person: _____

	UOM	/ TOU	Const	Format	C
1	_____	_____	_____	_____	_____

Reading: 1 _____

Change: _____

Worked by: _____

City Public Utilities Division

Dispatch Group: MYR-SHOP
Field Rep: Bello
Field Order ID: 890283746980

Page 1 of 1

Coordinate any service interruptions with client.
Account Start Date: 7/25/1959

Phone: (904) 891-6503

Street Name: Ponce de Leon Drive

Premise Type: Home

Subtype: Water

Meter Read Route: Southeast

Installed: 7/25/1999

Is	Read Type	Reading	Consumption
0	RG	1021	120 CFW
0	VR	1001	99 CFW
0	VR	992	97 CFW
0	RG	905	85 CFW
0	RG	423	101 CFW

Activity ID: 182533 WROSS
Priority: 5

4

Use	Readout	Protocol	Full Scale	Tolerance

5

Completed: ___/___/___ : ___ AM/PM

- The **optional Meter** section contains badge number, installation date, serial number, description, manufacturer, and model number. You can also include an optional RegisterSubsection.
- Optional **Multi-Items** or **Unbadged Items** are listed by description and item count in a separate section.

4. The **Field Activity** section, which describes each Field Activity type, follows the Service Point section. It contains scheduled date, priority, instructions, comments, and activity steps. Multiple Field Activities may occur for each Service Point. For each step, one or more sections may be printed for the Service Technician to hand-write data captured as a result of performing the step.

The **optional Credit and Collections** section (not shown) contains the financial status of an account including deposit balance, last payment date, last payment amount, last bill amount, last bill date, past due balance, current balance, and a credit rating. It can be used to assist a technician in collecting a balance due for the account

5. The **Worked By** section is completed by the Field Service person and records their signature, the time completed, and any meter data necessary for the Field Order to be closed.

A Field Order is designed to be a turn-around document, which means that comments, instructions and signoffs coming back from the field are entered into the Oracle Utilities Customer Care and Billing System. In most cases, the data that is entered will close out the Field Order which is then stored as a permanent record for that customer's account. In some cases, this data will cause a new Field Order to be produced, which will be printed with the next batch.

Field Orders are a flexible and powerful capability with the Pitney Bowes Business Insight Utilities Customer Care and Billing Edition. We have designed them so that you don't have to worry about the details and so that you can begin to take advantage of them as you implement your new billing system.

Customer Letters

Five Custom Templates Included

Timely customer communication is critical to any well-run utility. Citizens, shareholders, constituents — whatever you call your customers — demand professional and appropriate responses to their questions and issues. You also want to stay on top of customers who are past due, who have moved or who have special circumstances that need individual attention.

The Customer Letter capability of the Pitney Bowes Business Insight Utilities Customer Care and Billing Edition allows you to produce letters in batch for many

customers or one-at-a-time for a single customer. These letters can have a very structured format or they may be more free-form like a letter from your friend. Billing data, such as amounts due or recent payments can be extracted from the Billing System and included in your letter. As with the Bill and Field Order, you can include your organization’s logo, customize the fonts, or use letterhead or blank paper. The basic system includes five custom letters but you can create as many templates as you’d like, one for each special situation, for additional cost.



Multi-Language Bills

Improve Your Ability to Serve all Your Customers

Whether you are in the United States or serving customers throughout the world, we are becoming a multi-lingual society. Being able to communicate in your customers' native language helps them understand the services that you provide and builds customer loyalty. You will decrease customer service calls caused by confused customers, you'll increase customer satisfaction by using words that they understand, and you will increase cash flow because they are more likely to pay a bill that they understand.

With the Pitney Bowes Business Insight Utilities Customer Care and Billing Edition, you can create your entire bill in a single language, you can create it in multiple languages or

you can use selected features like the Conditional Messages in the native language of your customer. The Edition also supports Asian and Middle Eastern character sets as well as languages that read right-to-left, creating a truly international billing system. And, you can do all of this for all of your customers, selected groups of customers or for an individual customer. These multi-language benefits are also available for Field Orders, Customer Letters, and any other documents that are produced by the system.

The Pitney Bowes Business Insight Utilities Customer Care and Billing Edition gives you the flexibility to meet your customers' needs in a way virtually unmatched by others in the industry.

e2 Customer Service Option

Improve Customer Service with High-speed Document Storage and Retrieval

The e2 Vault from Pitney Bowes Business Insight is a sophisticated, highly-efficient electronic document repository for your customer bills, correspondence and other system generated documents. It is fully integrated with PBBI's DOC1 document generation system. No extra steps are necessary for you to take advantage of its powerful, time-saving features.

Customer Service representatives can easily access the latest bill, or any past bill that is stored in the system, from their desktop. Because the bill is stored using the same commands that were used to print the bill, you will get an exact representation of the bill when you access it online. Once the bill is displayed, it can be printed or emailed if the customer, or anyone else, who needs a copy. In addition, these print commands are much more efficient for storing documents, using significantly less storage than required for a PDF image of your bill. These powerful capabilities will reduce call handle time and reduce call backs while improving customer service and CSR morale.



Another advantage of the e2/DOC1 integration is that all of the technology required to file the documents, including the indexes required to access the documents by customer, by date or by number, is built in to the system. Unlike competitive systems which require indexes to be built after the fact, the e2 system allows access to documents within minutes of the production run.

An advantage of the integration between the Oracle Utilities and Pitney Bowes Business Insight systems is that the bills can be accessed from the Oracle Utilities Customer Care and Billing Solution dashboard by pressing the "View Bill" button instead of switching between screens or systems as you would with other solutions.

e2 Self-Service Option

Reduce Customer Service Calls with Online Bill Viewing for Customers

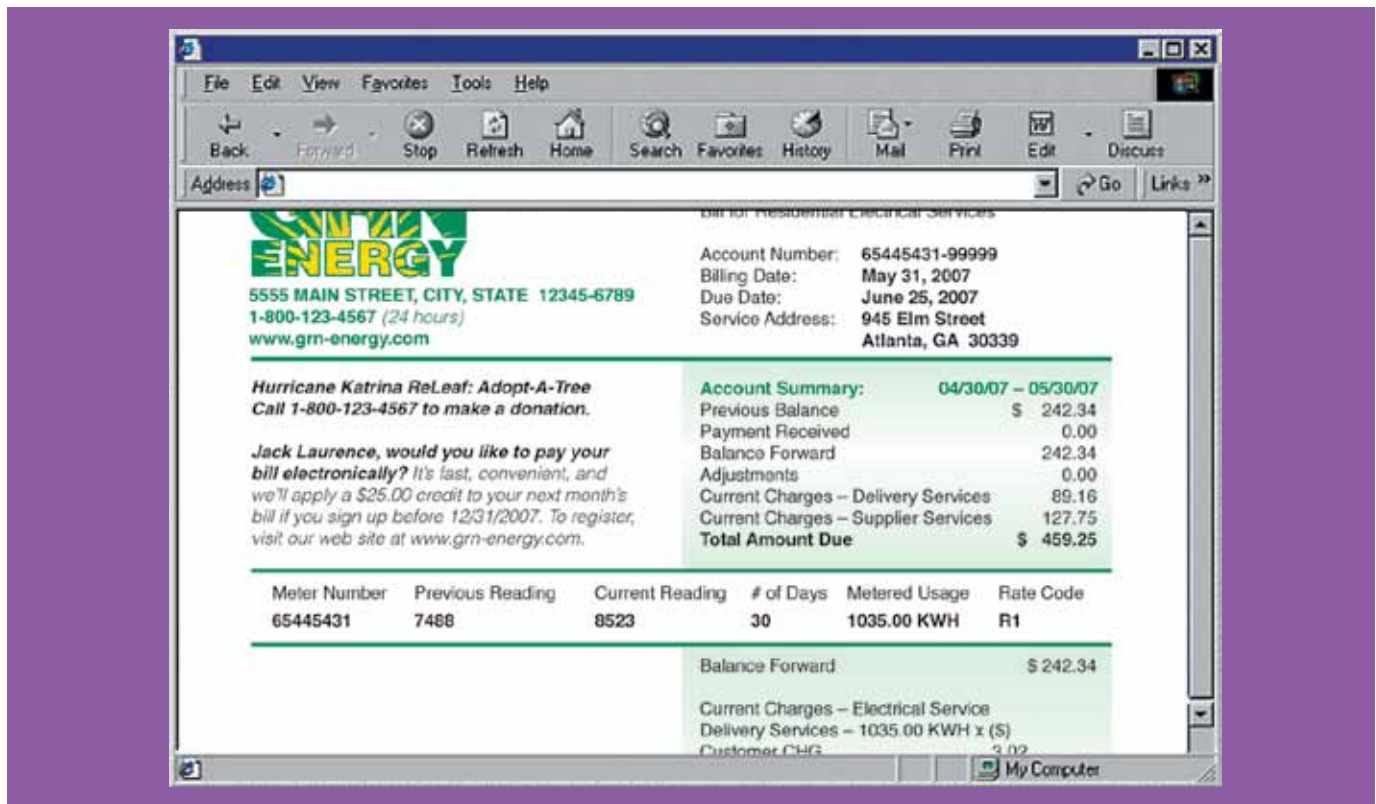
Customers today are Internet-savvy. They expect the companies that they buy from to allow them to view and print their bills through their browser, 24 hours a day, 365 days a year. However, for most utility providers, implementing this solution can be costly and difficult without an integrated approach that leverages your investment in hardware and software.

The e2 Self-Service Option from Pitney Bowes Business Insight allows your customers to have immediate Internet access to their bills. All of the plumbing necessary to connect your Oracle Utilities Customer Care and Billing System to your website is included as well as the security necessary to protect the confidentiality of the information for everyone. All you need to do is develop a simple login page on your website to provide access to this powerful capability.

Once logged on, your customers can retrieve any bill that you have stored for them, in the same exact layout as their printed bill. When they have it on their screen, they can view it, print it or download a copy to their own computer for permanent storage. A downloaded electronic copy eliminates the fear that some customers have of not having a permanent copy for their records. Your customers can access the system at any time of the day or night at their convenience.

With the e2 Self-Service Option, your customer also has numerous online payment options. Whether for a single payment or auto-pay, they can make secure payments via ACH or credit card. Although e-payment is an optional feature, it is often a key part of many online utility billing systems. This feature alone can improve cash flow, customer satisfaction and your image in the marketplace.

Overall, the Pitney Bowes Business Insight e2 Self-Service Option reduces calls to your Customer Service team and positions your organization as a leader in the utility marketplace.



Mailing Efficiency

Maximize Postal Discounts with Delivery Point Validation and Postal Presorts

The cost of mailing bills and other correspondence continues to increase. For many billers, it represents a sizeable share of their operating budget. And the United States Postal Service® promises annual reviews (and likely increases) of postal rates. In addition, the USPS® and other postal organizations now require greater accuracy for postal addresses. Undeliverable mail costs them a lot of money, and they want to make sure that undeliverable addresses are reduced or eliminated by providing financial incentives and penalties for volume mailers.

To ensure deliverability, the recipient's address data is validated, corrected and formatted by Pitney Bowes Business Insight' powerful Code-1 Plus®. Code-1 Plus formats the address according to USPS® standards by appending address directionals (N for North, S for South, etc.) and street suffixes (LN for Lane, DR for Drive, ST for Street, etc.) and assigning a ZIP Code. It compares the address to the National Change of Address (NCOA) registry to determine if the recipient's address has changed. It then performs Delivery Point Validation, a requirement of the United States Postal Service (USPS) as of August 1, 2007, which ensures that the address is deliverable according to the USPS. Finally, it produces the USPS 3553 CASS Report for submission to the USPS.



To qualify for postal discounts, Pitney Bowes Business Insight' Mailstream Plus® presorts the bills and calculates postage discounts according to the current postal regulations. This process produces the USPS 3600 Postage Report, which is required for bulk mailing discounts.

These two industry standard solutions are another way that Pitney Bowes Business Insight helps you save time, reduce your costs and improve your operational effectiveness.

Real-time Address Validation

Ensure the Quality of Your Data as it Enters your CIS

The Pitney Bowes Business Insight Utilities Customer Care and Billing Edition has numerous checkpoints to make sure that the customer address is accurate and deliverable. But doesn't it make sense to make sure the address is right when your Customer Service Representative enters it in to the system the first time? Well, that's what we do.

While the Customer Service Representative is taking information from a first time customer, or from a customer who calls to update their customer record, the system validates and standardizes the address, city, state and ZIP code. This helps to eliminate duplicate entries, reduces keystrokes (and their associated data entry errors) and protects the integrity of your Oracle Utilities Customer Care and Billing System data.

GeoTAX Reporting

Accurately Collect Sales Tax by Precisely Determining Your Customer's Location

The GeoTAX component of the Pitney Bowes Business Insight Utilities Customer Care and Billing Edition helps you determine accurate sales tax for your utility bill. The solution provides your utility with the most current, accurate tax jurisdiction assignments for your customer, which reduces financial risks and regulatory liability and saves you considerable tax research and customer service resources.

By determining the location of the rooftop of your customer (instead of the centroid of a ZIP Code like most systems), the GeoTAX feature assigns the correct state, county, township, municipal and special tax district information to an address. Pitney Bowes Business Insight is the only provider to offer an integrated solution with up-to-date municipal boundary information. Each year thousands of municipalities change boundaries so the GeoTAX solution provides an ongoing research program, with nationwide coverage, to track these changes. It provides you with the ability to monitor and respond automatically to boundary

jurisdiction changes with no effort on your part since it is an on-going service. Pitney Bowes Business Insight also provides comprehensive coverage of special tax districts for schools, E911, fire, transit, hospital, stadium, and others.

The GeoTAX solution is fully integrated into the Oracle Utilities Customer Care and Billing Solution. The calculated tax includes all of the appropriate taxing districts and will provide not only a total tax due but also a breakdown by taxing authority. You can choose to have one tax total on the bill or display a line item for each taxing authority. In addition, you're provided with a complete report by taxing authority for paying your taxes due. The GeoTAX feature is so well regarded that both Florida and Colorado have certified the GeoTAX jurisdictions so that your organization will be "held harmless" for any errors made in the tax calculation – if you're using GeoTAX.

The GeoTAX solution ensures compliance with the increasingly complex sales and use tax laws, eliminates the manual maintenance of sales tax tables, and reduces your customer service calls.



Sarbanes-Oxley Compliance

Improve Regulatory Compliance with Audit Trails Throughout the Billing Process

Investor-owned utilities are subject to the reporting requirements of the Sarbanes-Oxley Act of 2002. This law provides guidelines for the accounting practices of public companies. Although somewhat onerous, this law has helped insure that investors are protected from the accounting abuses prevalent in the early years of the 21st century.

Two sections of the Act are relevant to the Utility Billing process. Section 302 covers the accuracy of financial statements, specifically stated income tied to customer billing. Section 404 of the Act covers internal controls and dictates that generated bills were actually mailed to customers.

To help comply with these guidelines, Oracle Utilities and Pitney Bowes Business Insight have enhanced its Utility Billing process with some key enhancements. First, we extract audit logs from four key steps in the billing production process:

- An Extract Audit as data is pulled from the billing system into the print production process.
- A Composition Audit which tracks each bill as it merges the data with the print layout.
- A Printing Audit that validates that each bill was physically printed.
- An Insertion Audit that verifies that each of the bills was stuffed into an envelope.



These four audit logs are then consolidated using PBBI's powerful Dataflow™ Data Integration tool. Once the merged file is created, a program compares the data from the four audit logs and identifies those bills that did not complete each step. We have produced a comprehensive set of processing and exception reports for compliance management. Finally, we've enhanced the print production process to ensure that it can be physically audited and to support the requirements of the USPS.

Although this solution applies to a small but growing set of utilities, it reinforces the commitment that Oracle and Pitney Bowes Business Insight have made to the utility industry. We want to make sure that you have the right tools and information to guarantee your investors that you meet, or exceed, these compliance requirements.

Outsource Your Business Process

Increase Flexibility and Reduce Costs by Outsourcing Some or All of Your Billing Process

Time to market pressures, capital constraints and resource limitations are common to many projects in the business world. Utilities, both large and small, are no different. That's why it's valuable to have operational choices when implementing new systems or upgrading existing ones.

Pitney Bowes Business Insight allows you to license and implement any of the solutions described in this document at your own facility or outsource some or all of the solution. We can host and manage any of the Pitney Bowes Business Insight Utility Customer Care and Billing System components. Or, we can fill short-term or long-term gaps, when time, money or people are not available to meet your operational requirements. If you want, we can outsource some billing, print and mail or customer service functions now, then license the software and hardware later, and move it in-house.

The advantages to an outsourced solution from Pitney Bowes Business Insight are many:

- You don't have to make up front investments in hardware and software. We build the costs for running your system into a fair, monthly fee that covers all

aspects of the business processes that you entrust us with.

- We have fully redundant systems, including two production versions, an off-site backup system and a test system that can be used for conversions, upgrades and implementing new features. This level of data and operational protection exceeds what most organizations have in-house and gives you the peace of mind that you won't let your customers down.
- We know the Utility Billing business. We understand the business cycles, anticipate industry trends and speak the language. When you have a question during start-up or while we are running your system, we won't waste your time trying to learn your business.
- We treat your business as our own. We don't share data or hardware. We guarantee the privacy and security of your customers. And our service levels meet or exceed industry standards in all aspects of the operation.

With the resources and commitment of two multi-billion dollar organizations, we can provide you with the services that you need to meet the growing needs of your customers with a high-availability, cost effective alternative.



Improve the Effectiveness of Your Billing, Customer Care, and Print and Mail Operations

We Have Solutions

Getting your billing system up and running is a challenging and time-consuming process. Anything you can do to save time and money is important to the success of the project. The Pitney Bowes Business Insight Utilities Customer Care and Billing Edition makes the job a lot easier and reduces risk.

Our team will help you define and refine your organization's requirements, provide the right tools along with the industry's most capable professional services team and a complete support plan that ensures you derive value from your investment for years to come. We can do this whether you are replacing your entire billing system or focusing on incremental improvements that address performance gaps in your operation.

Leverage the experience of dozens of your peers and take advantage of our industry experience. Show our implementation team what you want and it will be done at a cost-effective price with professional results. Contact us today.

Pitney Bowes is a leader in end-to-end integrated mail solutions. Our leading-edge hardware, software and services can help you grow revenue, cut costs and strengthen customer loyalty, to drive your long-term profitability.

Oracle is the world's leading supplier of software for information management and remains the gold standard for database technology and applications in enterprises throughout the world.

Learn more about these comprehensive, integrated solutions from Oracle Utilities and Pitney Bowes Business Insight. For more information please contact:

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