

SpryPoint
SMART SOLUTIONS FOR SMART UTILITIES



SpryEngage Discovery

Presented to:

**CITY OF
CARTERSVILLE**

45 Queen Street
Charlottetown, PE
C1A 4A4, Canada

sprypoint.com

Executive Summary

SpryPoint conducted SpryEngage discovery analysis and platform review sessions with the staff of Cartersville during November 20, 2023. The session was focused on understanding the City of Cartersville's current internal processes. This session also explored how the SpryEngage Customer Portal Platform will replace the current customer portal that the City of Cartersville uses for customer facing processes. The primary objective of this session was to document Cartersville's current processes and to identify any functional areas that would require modification or enhancement. The discussions were focused on several key business processes. These discussions included:

- Customer Portal
- Alerts and Notifications
- Forms
- Administration
- Campaigns

This document will outline, at a high-level, how SpryEngage will meet Cartersville's business needs. In addition, this document will provide recommendations on changes to processes that will take advantage of features that SpryEngage provides.

Overall, our findings were that SpryEngage covers the current Cartersville processes effectively. A list of system gaps identified during the discovery session can be found in **Appendix A**.

We thank the City of Cartersville staff for the time and input they allocated for the discovery sessions and welcome any edits in our understanding as documented.

Statement of Confidentiality

The contents of this proposal are confidential and are supplied on the understanding that they will be held confidentially and not disclosed to third parties without the prior written consent of SpryPoint.

Authors

Name	Role
BK Kwee	Project Manager
Wylie Tanton	SpryEngage Implementation Consultant

Document History

Date	Version
November 20th, 2023	Draft 1.0

Attendees

Name	Role
Freddy Morgan	Executive Sponsor/Project Manager
Tara Mathis	Project Manager
Jackie Medina	Lead CSR
Brent Beck	Water
Demi Castillo	Utility Billing
John Dooloey	Electric
Lynn Gayton	Stormwater/PW
Anna Grier	Electric
Ryan Malone	Gas
Jack Thomson	IT

Table of Contents

Executive Summary	1
Authors	2
Document History	2
Attendees	2
Table of Contents	3
Background	5
Definitions	5
1.0 Self-Serve Portal	5
1.1 Sign Up	6
City of Cartersville Customer Portal - Sign Up	6
Customer Managed Sign Up	6
Utility Managed Sign Up	7
Conclusion/Gaps - Customer Sign Up	8
1.2 Sign In - SpryEngage	9
Home Page	9
Current Balance	9
Calls to Action	9
Usage Summary	10
Consumption Profile	10
Conclusion/Gaps - Customer Sign In	10
1.3 Payment	11
Cartersville - Payment	11
SpryEngage - Payment	11
Conclusion/Gaps - Payment	12
1.4 Payment History	12
City of Cartersville System - Payment History	12
SpryEngage - Payment History	13
Conclusion/Gaps - Payment History	13
1.5 Billing	13
City of Cartersville System - Billing	13
SpryEngage - Billing	14
Conclusion/Gaps - Billing	14
1.6 Forms	14
City of Cartersville - Forms	14
SpryEngage - Forms	15
Conclusion/Gaps - Forms	16

1.7 Profile Management	16
City of Cartersville - Profile Management	16
SpryEngage - Profile Management	16
Conclusion/Gaps - Profile Management	17
1.8 Help and FAQ	18
City of Cartersville - Help and FAQ	18
SpryEngage - Help and FAQ	18
FAQ	18
Tour	18
Conclusion/Gaps - Help and FAQ	19
2.0 Campaigns	19
2.1 In-App Campaigns	19
2.2 Email Campaigns	20
2.3 SMS Campaigns	21
2.4 Outbound Voice Campaigns	21
2.5 Contact Segmentation	22
2.5 Email/Text Templates	23
SpryEngage - Email/Text Template	23
Conclusion/Gaps - Campaigns	23
Appendix A - Gaps Summary Grid	24
Appendix B – SpryEngage Discovery Approval	25

Background

The City of Cartersville provides its customers with water, sewer, electric, gas, and fiber service. Cartersville Electric System has been providing service to Cartersville and a section of Bartow county since 1904. Cartersville Gas System has been providing service to customers since 1954 which consists of more than 315 miles of distribution mains. It is currently serving over 10,000 customers with natural gas. Cartersville Water Department has been serving customers since 1893. The City of Cartersville has chosen SpryEngage to replace their current utility billing customer portal.

Definitions

Term	Meaning
CIS	Customer Information System
AMI	Advanced Metering Infrastructure
AMR	Advanced Meter Reading
CSR	Customer Service Representative

1.0 Self-Serve Portal

The City of Cartersville currently offers all its customers the ability to view and pay bills through the Customer Web portal which utilizes Invoice Cloud as the backend payment processor. The landing page provides the customer an option to sign up or sign in with their current credentials. Once registered, functionality includes viewing historic billing information, sign up for paperless billing and auto pay.

SpryEngage's primary role will be to replace the Customer Web portal as a place for customers to pay their bill online but keep InvoiceCloud as the payment processor. SpryEngage will also bring an enhanced customer-facing experience for accessing account data. As detailed below, SpryEngage allows the customer to manage payments, statements, forms and consumption.

1.1 Sign Up

City of Cartersville Customer Web Portal - Sign Up

City of Cartersville's portal supports a self-service sign-up process. Customers can sign up and create a profile through InvoiceCloud and then link their existing account. To do so, the customer must provide a City of Cartersville account number and email address. Once the profile is created, the account can be linked and this will allow the customer to begin using the portal.

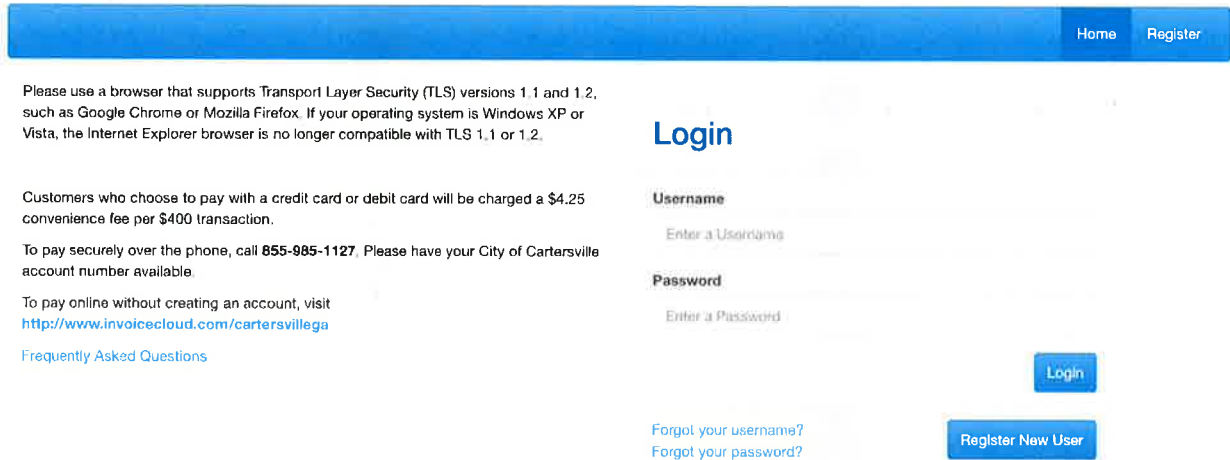


Figure 1: Register for a new Profile

Sign Up – SpryEngage

Customer Managed Sign Up

Once an account is created in Cogsdale, this data is then synced into SpryEngage. When using Invoice Cloud as the integrated payment processor, customers may register once the Cogsdale account information is sent into Invoice Cloud. This typically happens when either the new account charges are sent to Invoice Cloud or the customer is billed and the new account is sent within the BIF (Biller Invoice File). Only when both Cogsdale and Invoice Cloud are aware of the account can the customer then proceed with registration in SpryEngage. The sign-up validation process will require the customer to enter their account number and their last bill amount. In practice, the sync between SpryEngage and Cartersville's Cogsdale CSM will validate the account number against the two most recent bills.

Along with the validation, the customer will have to enter their email address, phone number, opt-in for various notifications, and accept the terms and conditions. The

validation is done dynamically via web service and a user interface element will let the customer know if the account passes validation.

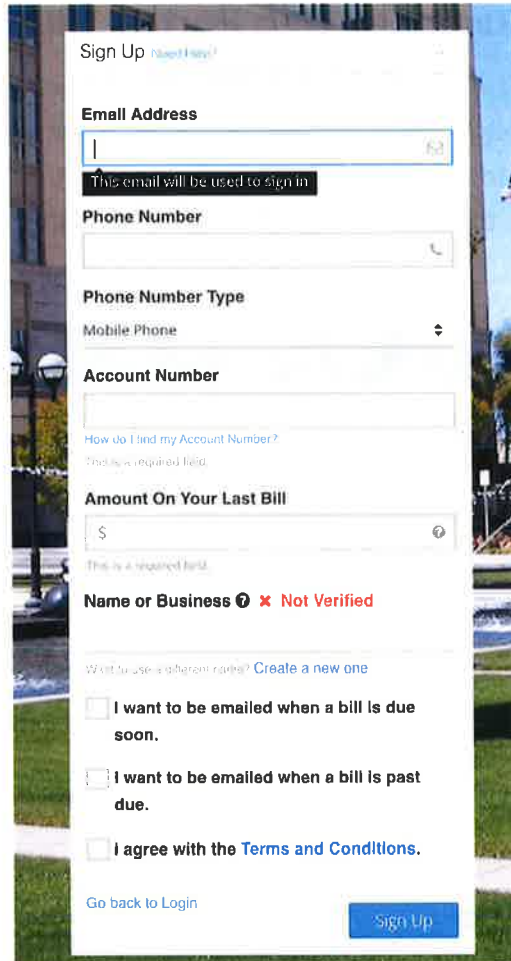


Figure 2: Sign Up Portal

Once all the information is entered and validated, the customer will be sent a validation email that will also prompt them to create a password to complete the sign up process. The customer may now login and access the SpryEngage platform.

Utility Managed Sign Up

If a customer is unable to complete the sign up or otherwise request the sign up from the utility, the Cartersville staff with SpryEngage Customer Service Representative permissions may initiate this process on behalf of the customer. To support this request, the Cartersville customer service representative will initiate the invitation process via the contact record in SpryEngage. This process will send the customer a validation email that prompts them to confirm their email address and create a password. In the scenario that the customer has multiple location records linked to their customer record, subscribing to one account will also include a subscription for all accounts. The customer will be able to navigate through all their active or inactive accounts to access previous account history.

SpryEngage Registration Process

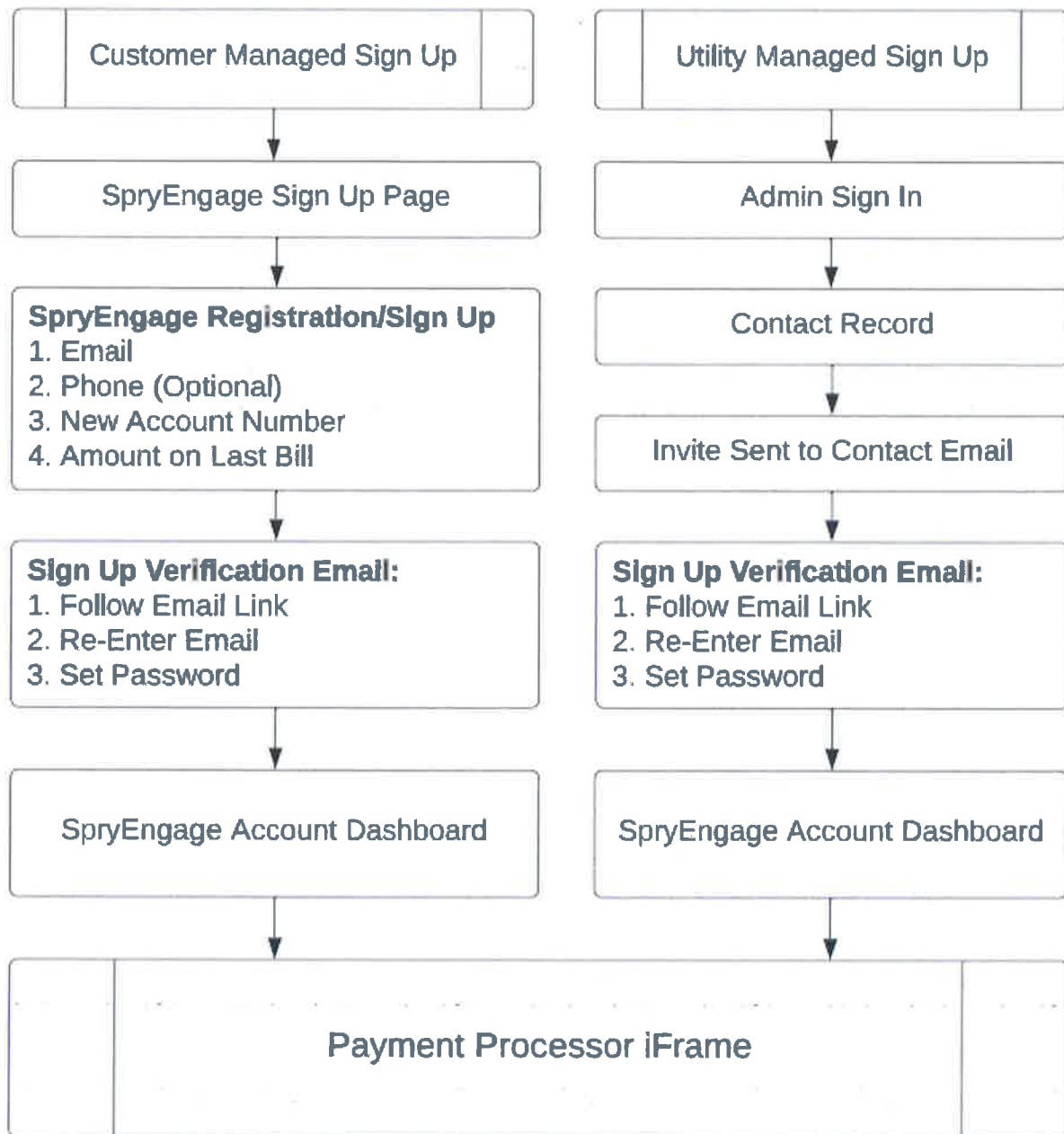


Figure 3: SpryEngage Signup Workflow

Conclusion/Gaps - Customer Sign Up

SpryPoint **meets** the business requirements of the customer sign up process. Please note that leveraging of current portal user credentials will depend on the current Customer Web integration with Invoice Cloud and what is available to SpryEngage at go-live. Further investigation will take place once access to the production Invoice Cloud

environment is granted. If available, SpryEngage will utilize the customer's email address passed to Invoice Cloud for login rather than the username used in Customer Web.

1.2 Sign In - SpryEngage

Home Page

When logged into the portal, the customer is brought to the home page. This page contains various elements such as call to action buttons, graphical and numerical consumption details and balance details. If desired, the customer can set guest access to their account for read-only or the customer can add additional full users to the account. This may be useful for providing access to a spouse or roommate which will allow them permission to take action on the account. This functionality is tied to the enablement of Invoice Cloud's multi-customer and co-owner feature. This must be enabled to support these features in SpryEngage.

Current Balance

The Current Balance tile (*Figure 4*) presents the customer's account information, account balance and account balance due date. From this tile a customer can navigate to "Make a Payment" or "View Current Bill".

Calls to Action

The Call to Action tiles support up to 5 tiles in the middle of the page upon loading into the home screen. The displayable tiles are, but not limited to Paperless Billing, AutoPay, Pay-By-Text and My Wallet. The City of Cartersville's payment processor, will manage these actions through the integration into SpryEngage. Upon the successful sign-up of a call to action tile, it will display a "Signed Up" indicator (*Figure 4*). After signing up, the tile will display an option to "Manage" the desired call to action tile.

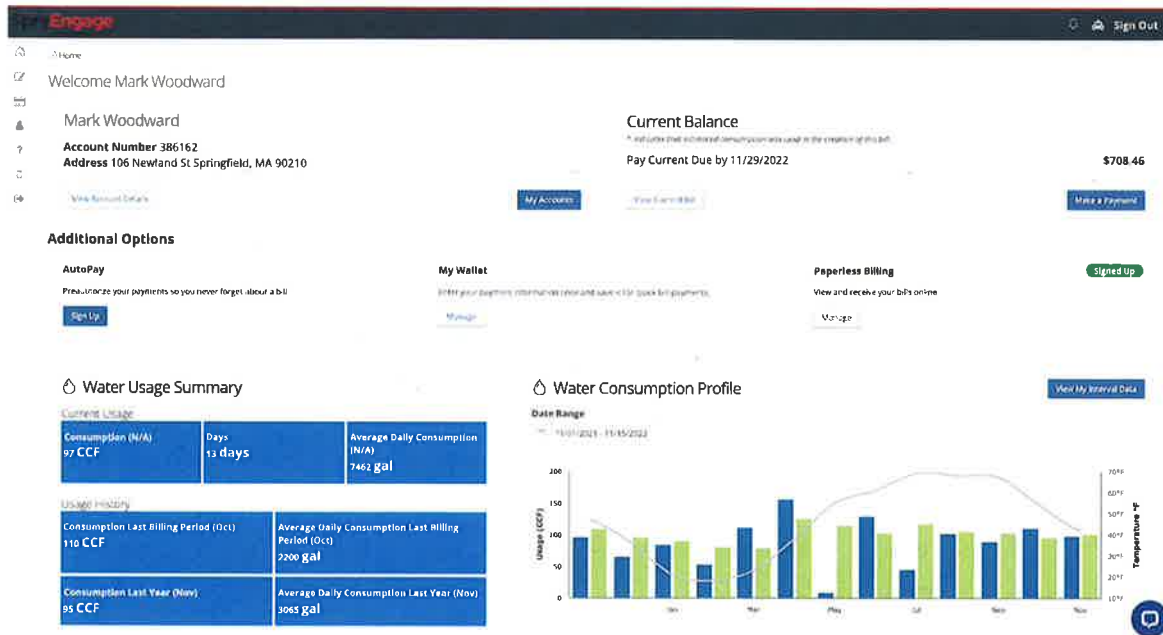


Figure 4: SpryEngage Home Page (Dashboard)

Usage Summary

The Usage Summary tile details the current period and historic usage details on the account. These tiles will exist for each service bill on the account. For a City of Cartersville customer who receives water, electric and gas a usage summary detail will appear for each. This provides the customer with a quick visual of the current month's usage against the previous period, last year's same period and period averages. This provides the customer a quick numeric recap of their usage.

Consumption Profile

The Consumption Profile chart displays the customer's billed usage in a bar chart format segmented by month along the x-axis. Displayed along the y-axis is the customer's usage along with an overlay of the average temperature mapped to the utility's location. Above the bar chart is the data range which can be set to include additional months on the bar chart for increased visibility. This chart will exist for water, electric (KW and KWh), and gas service. Along the bottom of the bar chart is an option to download the consumption profile data into a CSV file format.

Conclusion/Gaps - Customer Sign In

SpryPoint **meets** Cartersville's business requirements for the customer sign in functionality. As part of this implementation we will be supporting consumption information for water, gas and electricity.

1.3 Payment

Cartersville - Payment

The City of Cartersville is currently utilizing the Customer Web portal as the customer facing platform with Invoice Cloud as the payment processor for bill payments. This system allows customers to make registered one time payments. InvoiceCloud also currently manages the customer's AutoPay and e-bill subscriptions. As part of this project, Cartersville will be transitioning to SpryEngage with Invoice Cloud being maintained as the integrated payment processor. The following SpryEngage payment processor integration example is to demonstrate how payment processors are integrated with SpryEngage.

SpryEngage - Payment

In SpryEngage, payment options are dependent on the underlying payment processor chosen by the utility (InvoiceCloud). InvoiceCloud will also determine the accepted payment methods and channels (PayPal, Pay-by-Text, Amazon, Venmo etc.). This section explains the interaction of SpryEngage to the payment processor and the available payment options.

Members have two options through the SpryEngage portal to make payments on their account. This will be done as either a registered user or using the one-time payment feature. Within the registered SpryEngage experience, members may have the option to make a payment across multiple accounts at one time, save a payment method to a wallet and sign up for AutoPay. These options will be dependent on the client's contract with the payment processor chosen by the utility. Any additional convenience fees for using the online portal are left up to the utility.

By leveraging the one-time payment functionality, customers may pay without registering a profile. By navigating to the SpryEngage home screen, a one time payment option will be available. The criteria the customer must provide will be dependent on the payment processor. Often the customer simply has to provide the account number and/or zip code to be authenticated. They will then be provided the option to add a method of payment and select the amount they would like to pay against their account's balance.

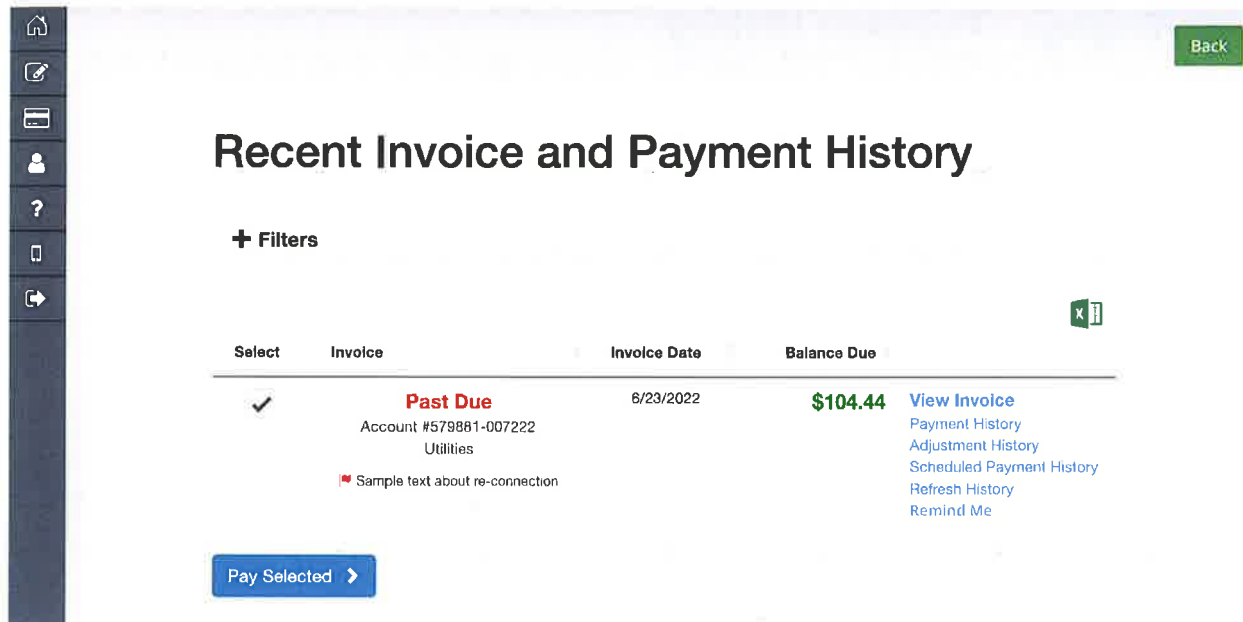


Figure 5: InvoiceCloud Payment Page within SpryEngage

From the portal login, the customer can navigate to the payment section, select the payment method from the wallet or add one and proceed to the payment. All payments are posted on the portal without delay with a pending status. Once the payment is processed, the customer will receive a confirmation email of the payment.

AutoPay

Manage

[+ New AutoPay Setup](#)

Save trees, checks, stamps, and time. Sign up for AutoPay and pay invoices automatically on their AutoPay collection date. AutoPay will automatically pay invoices on their due date using your default payment method. AutoPay will send you an email confirmation of your transaction as each invoice is paid, automatically.

i
You are not set up on AutoPay.

You may set up AutoPay by clicking [here](#).

Figure 6: InvoiceCloud AutoPay Page within SpryEngage

Conclusion/Gaps - Payment

SpryPoint **meets** the business requirements for the payment section.

1.4 Payment History

City of Cartersville System - Payment History

Payment history is currently displayed by linking to Invoice Cloud inside Cartersville’s Customer Web portal. There appears to be no restriction on the historical payment history available for the customer to review.

SpryEngage - Payment History

To view the payment history, the customer uses the “Billing” tab, located on the side navigation bar. The page simply shows the payment history, including the dates and amounts, along with the statement history and the current balance.

The history can be downloaded in CSV format or copied to the clipboard.

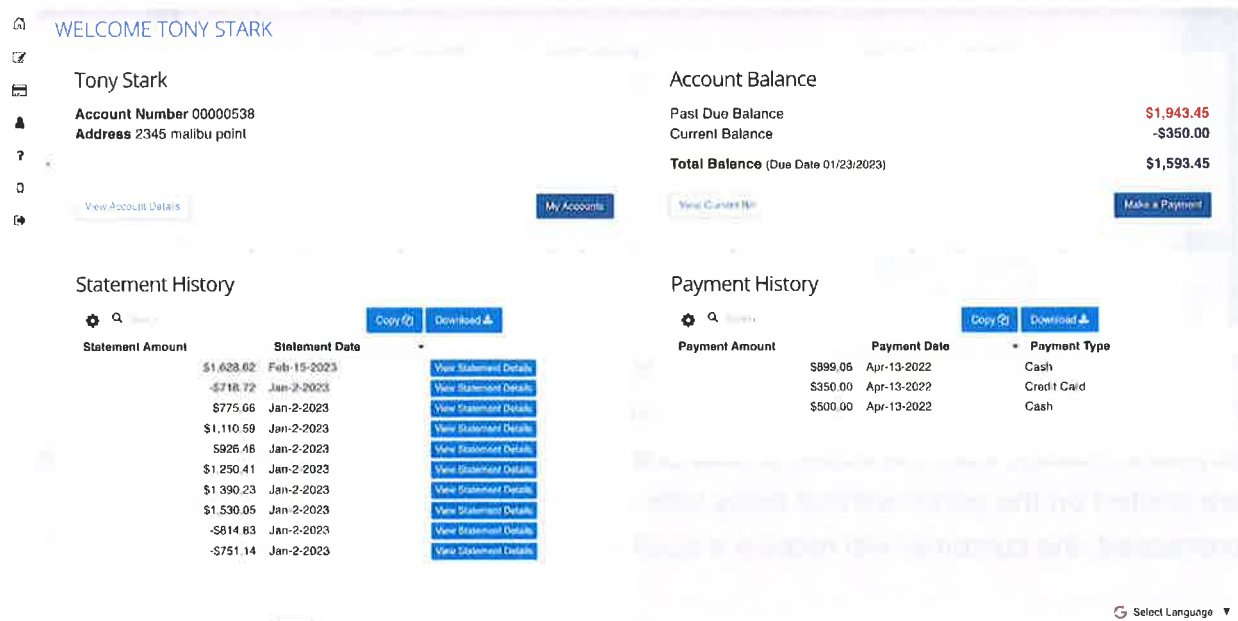


Figure 7: Billing Page - Payment History

Conclusion/Gaps - Payment History

SpryPoint **meets** the business requirements for Payment History.

1.5 Billing

City of Cartersville System - Billing

The City of Cartersville utilizes two separate streams of bill rendering based on the account’s e-bill preference. For accounts receiving a paper bill copy, Cogsdale generates a file for their bill print vendor Arista who renders and prints the bill. For customers on electronic billing, Invoice Cloud leverages PDFs rendered on CSM web service using a Crystal Reports template. Customers may then access the PDF rendering from within the Customer Web portal and Invoice Cloud.

SpryEngage - Billing

To view the statement history, the customer uses the “Billing” tab located on the side navigation bar. The page simply shows the statement history, including dates and amounts, along with the payment history and the current balance.

The history can be downloaded in CSV format or copied to the clipboard. There is also an option to download the PDF format of a given bill.

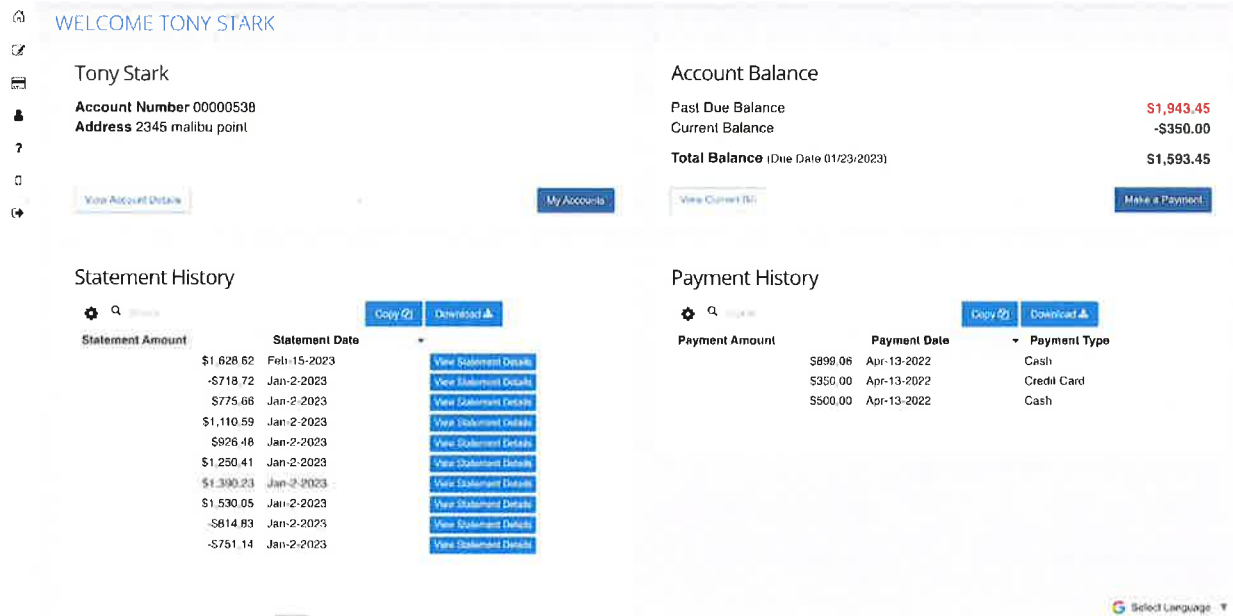


Figure 8: Billing Page - Statement History

Conclusion/Gaps - Billing

Bill statements need to be provided to SpryEngage in a PDF format. This is currently not possible for customers with e-bill statements. Further investigation is required to understand how SpryEngage may retrieve rendered PDF bills. This enhancement is subject to the Change Order process.

1.6 Forms

City of Cartersville - Forms

The City of Cartersville is currently utilizing a combination of Esri ArcGIS Survey123 and published PDFs for the management of electronic forms. The City of Cartersville has expressed interest in amalgamating electronic form management for utility related functions from Esri into the SpryEngage application.

SpryEngage - Forms

In SpryEngage, forms can be found on the navigation sidebar for a customer who is logged into SpryEngage or published as a public form on the utility website not requiring authentication (e.g. Start service). The screen in SpryEngage displays all the possible forms that have been authored by the utility.

Forms can be embedded in the portal or directly on the utility website. Forms may be available publicly, portal only or both. During the configuration phase, SpryPoint will build some existing forms alongside the City of Cartersville team as a training tool should they wish to build any additional forms in the future.

Utility Service Application

Contact Information

First Name Last Name or Company Name Email Account Number

Government Issued Identification

Please input Your Driver ID Government Issued Identification

Choose Files

A NON-REFUNDABLE setup fee of \$75 is required for water service

Service Address (Address Number) Street Name Unit/Apt # Service Start Date

Applicant's Name (Individual Full Name - Last, First MI or Business Name)

Email Address Last Four Digits of SSN # or Tax ID # for Business

Government Issued Identification

Choose Files

Work/Daytime Number

Billing Address

Please Check if the same as the Service Address

Billing Address (Address Number, Street Name, Unit/Apt #, City, State, Zip Code)

Account Classification Dwelling Type

Number of Units Property Owner Status (Check One box)

Own Lease

New Owners must provide final closing escrow documentation or deed. Tenants must provide a signed and dated rental/lease agreement.

Choose Files

Property Owner/Manager Name Property Owner/Manager Phone Number

Property Owner/Manager Address

Co Applicant's Name Co Applicant's Phone Number

Figure 9: Portal Form Example

SpryEngage allows utilities to build new, modify existing, clone existing forms, by themselves to embed in the portal or website. Forms have the ability to be customized and reused, a workflow can be established for automated emails, approvals, and tracking of the form's status for both the customer and the utility users.



Figure 10: Form Builder/Editor

Conclusion/Gaps - Forms

SpryEngage **meets** the business requirements of this section.

1.7 Profile Management

City of Cartersville - Profile Management

In the Customer Web portal, there are not many profile configuration options. Customers can manage their contact preferences, auto pay and view their bills.

SpryEngage - Profile Management

In SpryEngage, all changes to the profile can be made using the “Profile” navigation sidebar option. The Profile page allows the customer to modify their mailing address, display name, phone number, email address and alerts. With the exception of phone numbers, contact information will reside exclusively within the SpryEngage platform. Customers can also view form submissions as well as add multi-factor authentication, manage wallets and add additional utility accounts on their own.

For the integration of Cogsdale CSM to SpryEngage, SpryEngage will only send phone number updates back to CSM. However, reports may be generated to retrieve customer updates to email addresses, and/or mailing addresses.

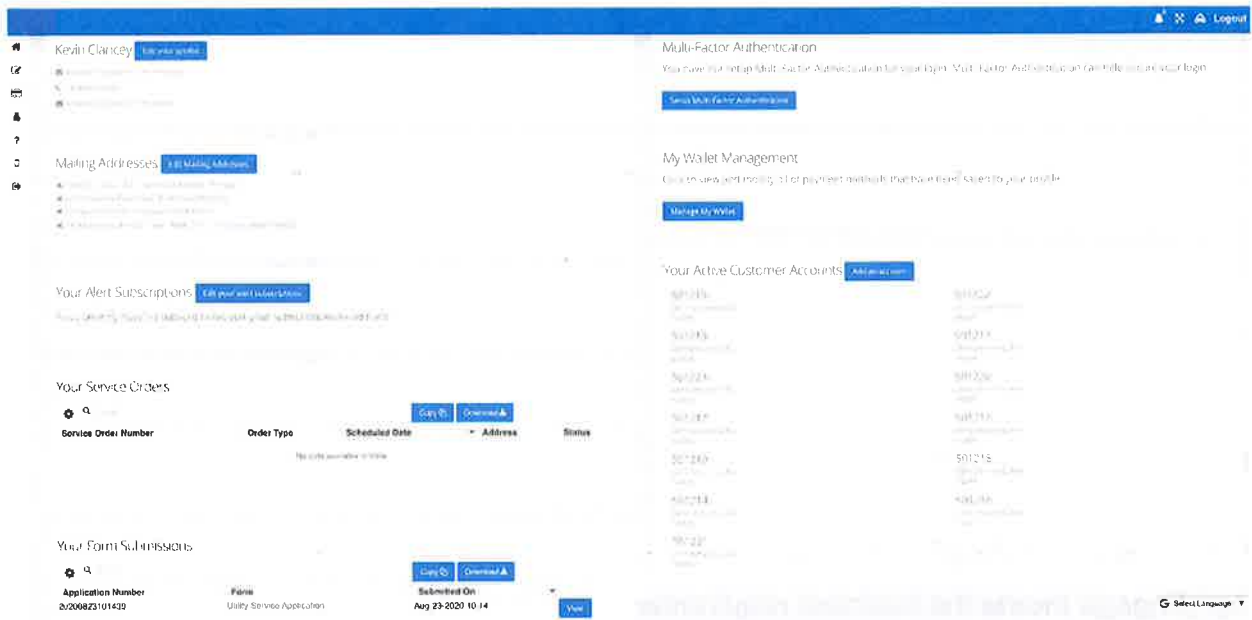


Figure 11: Profile Management Page

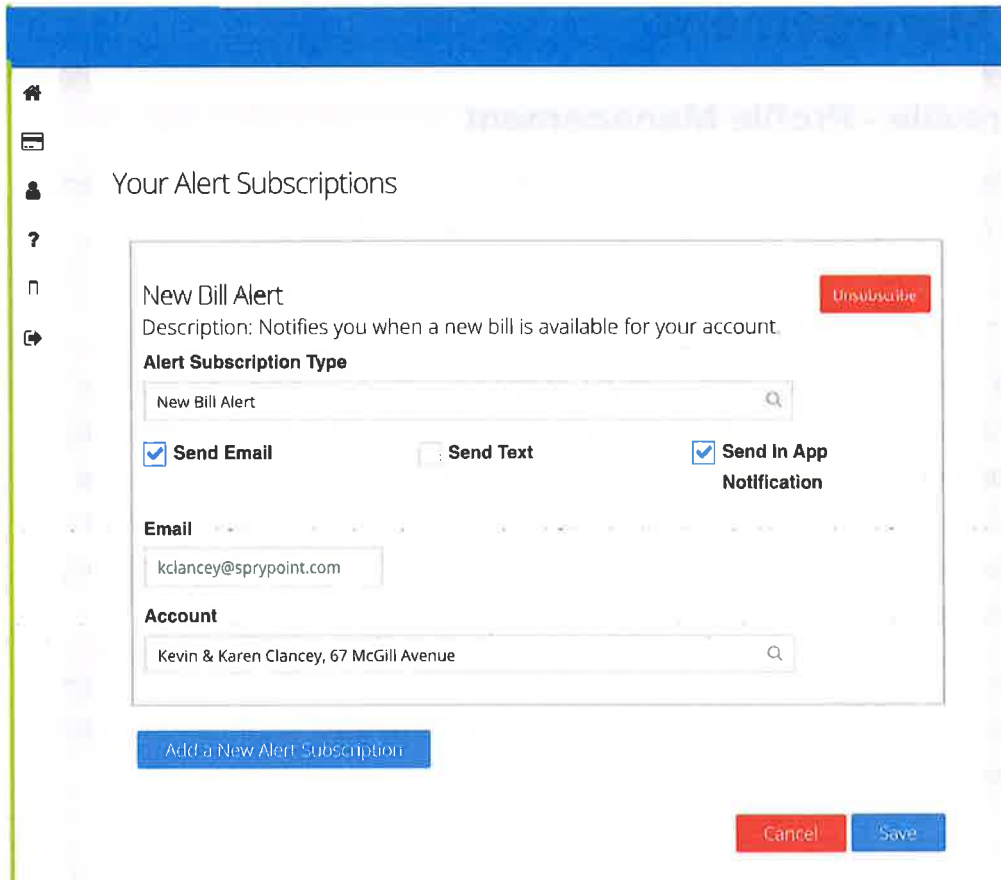


Figure 12: Alert Subscription Manager Tool

Conclusion/Gaps - Profile Management

SpryEngage **meets** the business requirements for the Profile Management section.

1.8 Help and FAQ

City of Cartersville - Help and FAQ

City of Cartersville offers an FAQ page on their public website here:

<https://www.cityofcartersville.org/customer-service/page/faq>

These may be replicated within SpryEngage for registered customers.

SpryEngage - Help and FAQ

FAQ

SpryEngage offers an online FAQ available through the “Help and FAQ” tab on the navigation sidebar. The content is replicated from the utilities FAQ and adapted to fit the SpryEngage navigation. The FAQ is not downloadable.

Tour

A tour of the platform is offered on the first login. The tour highlights all the functionalities of the platform and offers useful insights on its use. Tours are also available on-demand for customers to re-initiate in the future as needed.

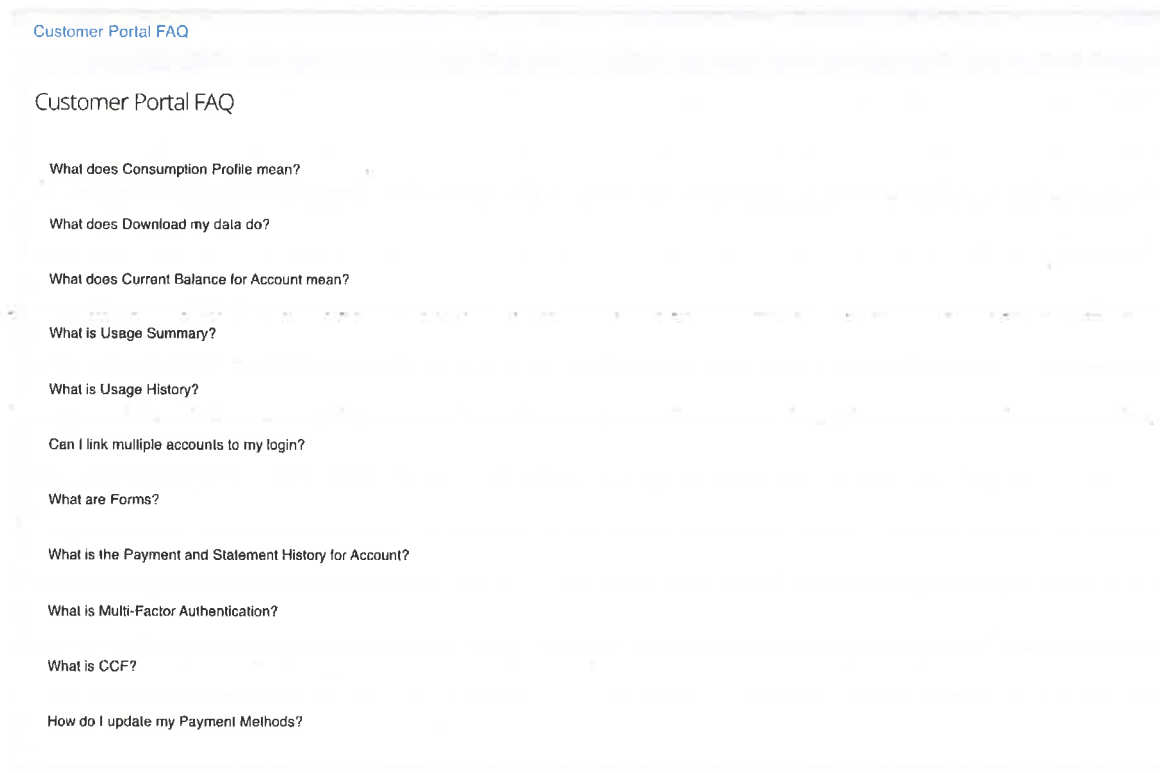


Figure 13: FAQ Page

Conclusion/Gaps - Help and FAQ

SpryEngage **meets** the business requirements for Help and FAQs.

2.0 Campaigns

The City of Cartersville is currently not utilizing any mass communication tools. It was noted that the City of Cartersville is interested in the ability to target customers for programs utilizing campaigns from within SpryEngage.

2.1 In-App Campaigns

Campaigns within SpryEngage are used to provide a means of grouping contacts for the purposes of outbound communications. Campaigns may be used for a variety of purposes including but not limited to:

- Service interruptions
- Safety and water advisory notifications
- Conservation and efficiency programs
- Educational opportunities

Campaigns are created within the SpryEngage platform. Various elements can be set such as the start and end date, campaign name, body and means of communication (Email, SMS and Outbound Voice). The system will take into account the customer's explicit opt-in to communications before sending any messages to the customer, however, if based on the utility's judgment a message does not require explicit opt-in, this may be overridden.



Figure 14: Campaign Notification Editor

2.2 Email Campaigns

SpryEngage offers built-in email campaign management. This tool allows the utility to customize email templates for a campaign, collect and analyze campaign data and automate the campaigning process. Within the template builder, variable fields can be set such as full name, first name, last name, title, phone number and email address.

SpryEngage also takes into consideration the customer's opt-in status for communication.

New Email Template

Template Name

Template Name

Required

Template Variables

You can insert variables into your email subject and body. These will be replaced with information related to the contact you are mailing. You can insert a variable anywhere in your email subject or body by, for example, typing `${contactName}`. Or you can use the "Variables" dropdown in the editor.

Available variables:

- `${contactName}`: the full name of the contact.
- `${contactFirstName}`: the first name of the contact.
- `${contactLastName}`: the last name of the contact.
- `${contactPhoneNumber}`: the primary phone number of the contact.
- `${contactEmail}`: the email address of the contact.
- `${contactTitle}`: the title for the contact such as Mr., Mrs, Dr. etc.

Email Subject

Email Subject

Required

Email Body

Rich text editor toolbar with icons for undo, redo, variables dropdown, bold, italic, underline, strikethrough, link, unlink, list, list, list, text color, background color, and source code. Below the toolbar is a large text area for editing the email body content.

Save Cancel

Figure 15: Campaign Template Editor

2.3 SMS Campaigns

SpryEngage offers the same experience for SMS (text message) campaigns as those referenced in Email Campaigns. The SpryEngage platform allows the utility to customize SMS templates for a campaign, collect and analyze campaign data and automate the campaigning process. Within the SMS template builder, the SMS body can be tailored by the utility. Each template can be saved and reused in future campaigns if desired.

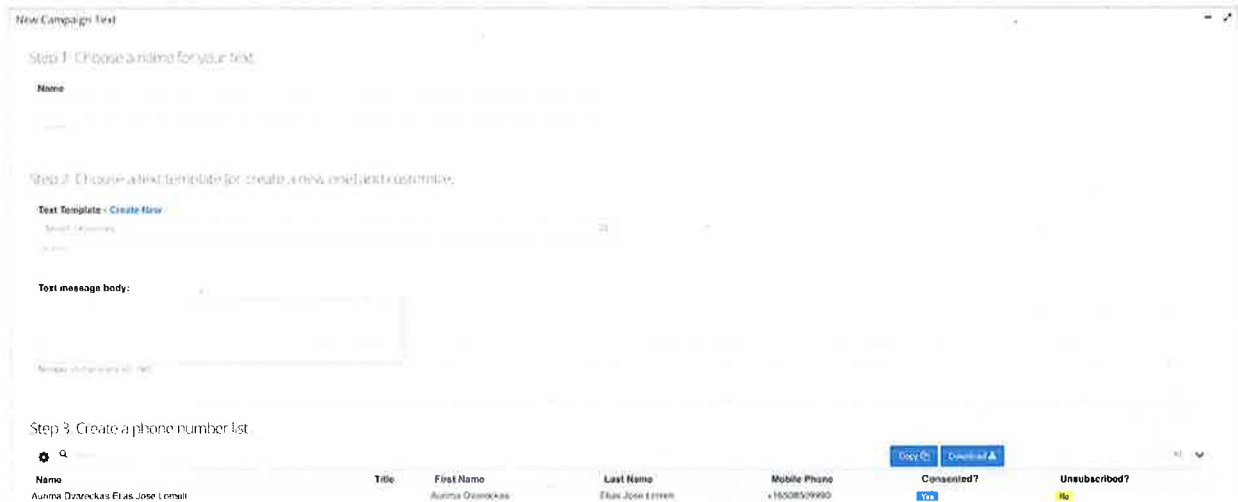


Figure 16: New Campaign Text

2.4 Outbound Voice Campaigns

SpryEngage also offers an option to send an outbound voice campaign. The outbound voice message sent to customers can be configured through text-to-speech or by uploading a pre-recorded message. Once the voice campaign has been sent, SpryEngage will collect data on messages that were received, failed, unanswered, busy and/or sent to voicemail.

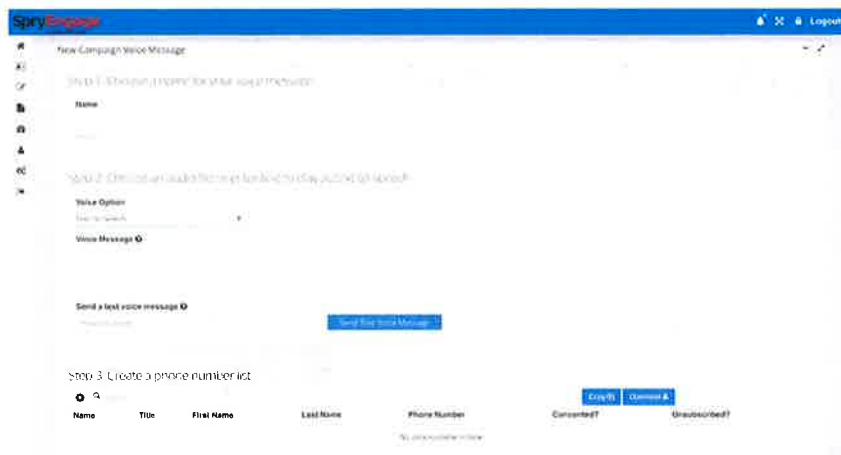


Figure 17: New Campaign Voice

2.5 Contact Segmentation

For campaigning, SpryEngage offers a large variety of segmentation options in order to have a granular selection of customers. Segmentation of contacts is commonly defined by those enrolled in a particular alert type, those assigned a particular tag or those selected based on geography via the Operations Dashboard Map feature (currently there is a limit to selecting a maximum of 5000 contacts at a time).

Add Campaign Contacts

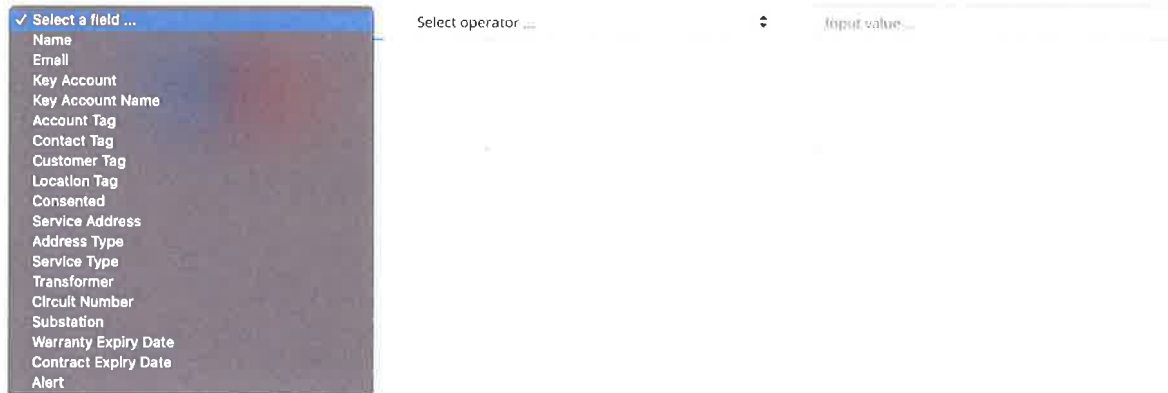


Figure 18: Campaign Contact Selector Page (Segmentation)

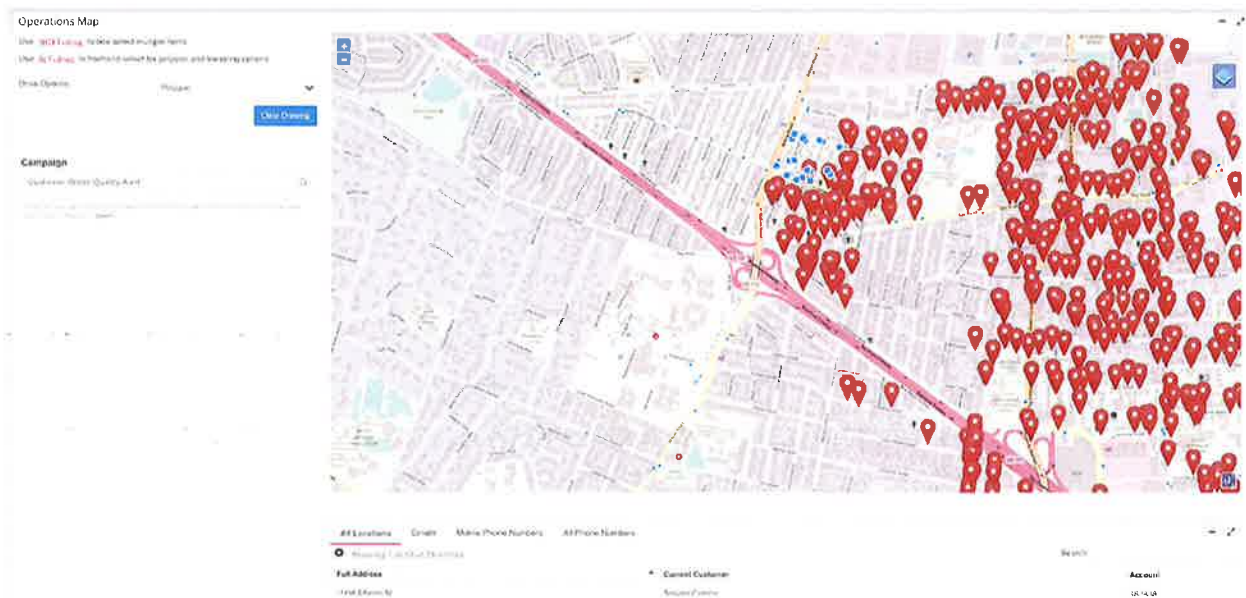


Figure 19: Operation Map Dashboard

2.5 Email/Text Templates

SpryEngage - Email/Text Template

SpryEngage allows the utility to create and customize an email and SMS template for each campaign. In the email templates, variable fields can be set such as full name, first name, last name, title, phone number and email address. For SMS, the SMS body can be tailored by the utility. Each template can be saved and reused in future campaigns if desired.

Conclusion/Gaps - Campaigns

SpryEngage **meets** the business requirements for Campaigns.

Appendix A - Gaps Summary Grid

Category	Description	City of Cartersville Confirmed Requirement	Comments
Invoice Cloud Leveraged Login	Keep customer's profiles from Invoice Cloud to be moved over to SpryEngage.		To be investigated. Will be dependent on data available from Invoice Cloud.
Bill Presentment	Retrieve a full list of rendered PDF statements.	Required for go-live	Further investigation required. Unable to retrieve all rendered PDFs from their bill print vendor.

Appendix B – SpryEngage Discovery Approval

City of Cartersville has had the opportunity to review this report and at this time finds no issue with the content. City of Cartersville Approved by:

Signature of Authorized Representative of the City of Cartersville

Name (print): _____

Date: _____

SpryPoint Accepted by:

Judy Wells, Executive Sponsor

Date: _____