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Gexa Commercial Portal

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User Guide

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Version 1.8

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## Accessing the Commercial Portal


Login by using the following link: <https://commercial.gexaenergy.com>

Or by visiting the Gexa website and clicking on the My Account link on the Commercial Home page of Gexaenergy.com



## Login Page


## Account Registration

Start by clicking on the  button.

Fill in the form and agree to the terms of service.

**Note:** Usernames, passwords, and emails must be completely unique and not already assigned to another User. If the username or email is not unique, the following error message will appear.

**Error creating User. Username, password, or email may already exist. Please edit and try again.**

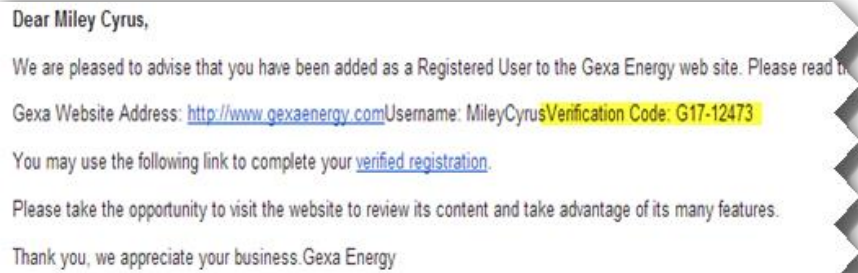
Select  after accepting the terms and completing the form.

## Verifying Your Account

To complete registration, please retrieve the verification code sent to the email specified during the registration. Please remember to check the junk email folder if the email is not found in the Inbox.

The email will contain a code (highlighted below) that must be entered in the portal before one can proceed. Access the verification page three ways

1) By clicking “verified registration” link provided in the email



Dear Miley Cyrus,

We are pleased to advise that you have been added as a Registered User to the Gexa Energy web site. Please read the following information:

Gexa Website Address: <http://www.gexaenergy.com> Username: MileyCyrus Verification Code: G17-12473

You may use the following link to complete your [verified registration](#).

Please take the opportunity to visit the website to review its content and take advantage of its many features.

Thank you, we appreciate your business. Gexa Energy

2) By clicking on “continue” the registration will verify



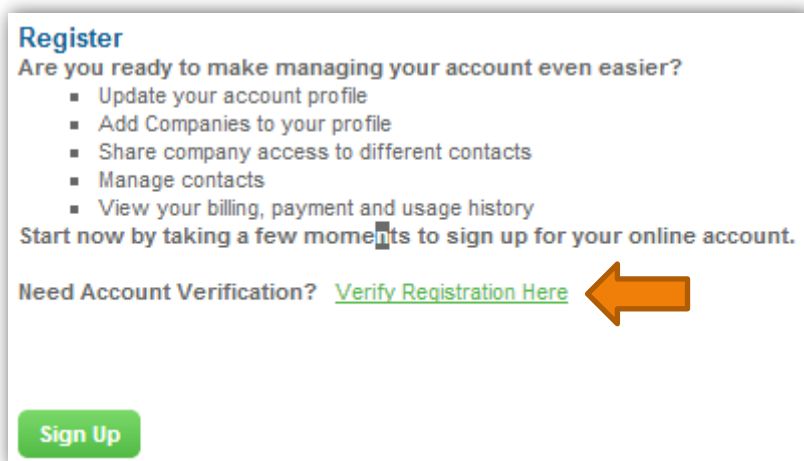
Thanks for signing up for online account management. You are one step away from being able to:

- Update your account profile
- Attach Entities/Companies to your account
- Add Contacts to your Companies and give them access
- View your billing, usage and payment history

Please click on the “Continue” button and verify your account, using the username, password, and the verification code you received in the email confirmation.

[Continue](#)

3) Or by selecting “[Verify Registration Here](#)” on the Login Page



**Register**

Are you ready to make managing your account even easier?

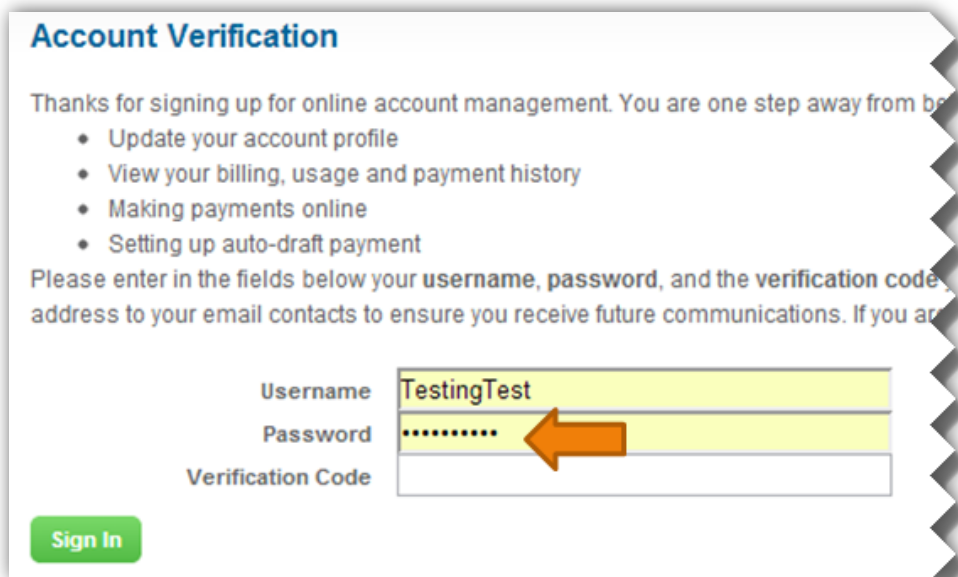
- Update your account profile
- Add Companies to your profile
- Share company access to different contacts
- Manage contacts
- View your billing, payment and usage history

Start now by taking a few moments to sign up for your online account.

Need Account Verification? [Verify Registration Here](#)

[Sign Up](#)

Type in the account verification code received in the registration email:



**Account Verification**

Thanks for signing up for online account management. You are one step away from being able to:

- Update your account profile
- View your billing, usage and payment history
- Making payments online
- Setting up auto-draft payment

Please enter in the fields below your **username**, **password**, and the **verification code** that was sent to your email contacts to ensure you receive future communications. If you are having trouble, click on the links below.

Username:

Password:

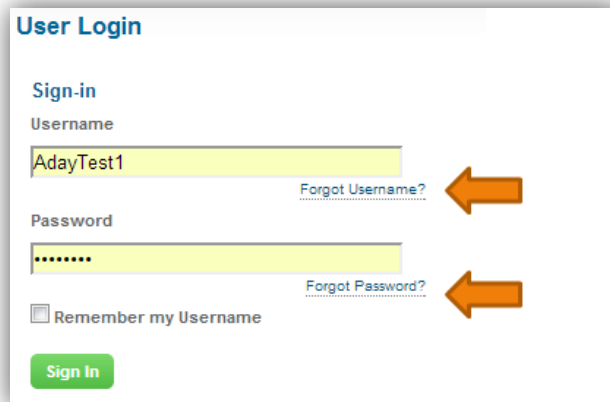
Verification Code:

[Forgot Username?](#)

[Forgot Password?](#)

## Forgot Username and/or Password

- 1) Click on the appropriate link on the user login page if the login is forgotten



**User Login**

Sign-in

Username:

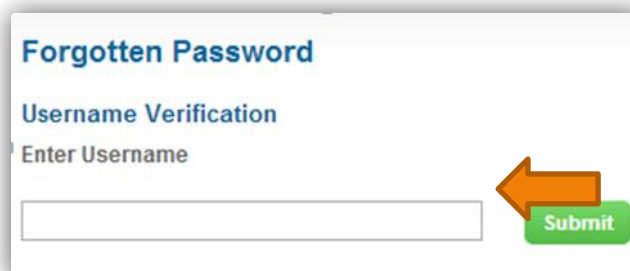
[Forgot Username?](#)

Password:

[Forgot Password?](#)

☐ Remember my Username

- 2) Enter username

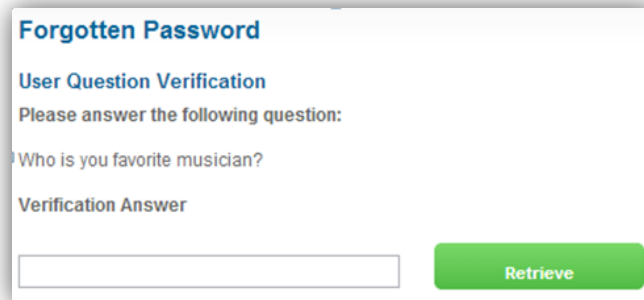


**Forgotten Password**

Username Verification

Enter Username:

3) Enter the answer to the security question chosen during registration



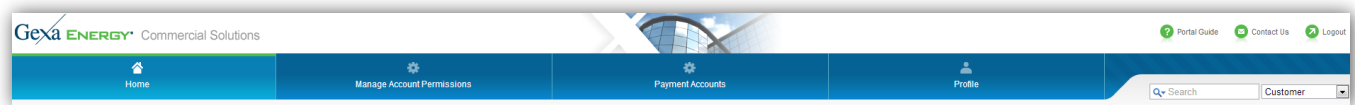
The screenshot shows a web form titled "Forgotten Password" in blue. Below the title is a section labeled "User Question Verification" in blue. It contains the text "Please answer the following question:" followed by a question "Who is your favorite musician?". Below the question is a label "Verification Answer" and a text input field. To the right of the input field is a green button with the text "Retrieve".

After the password has been changed, the page will be redirected to the login page where one must enter the new login info to enter.

A notification will be sent to the email address on file regarding the account changes made.

## Commercial Portal Menu

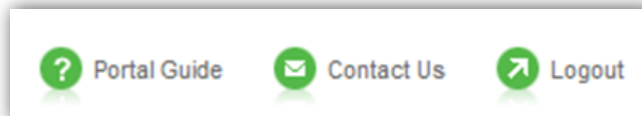
### Portal Menu



The portal menu is represented by blue tab selections across the top of the web page.

Select the tab of choice by clicking on top of the tab; once selected the opened tab will change to a lighter blue color.

Additionally, there are three buttons found in the top right-hand corner of the webpage:



**Portal Guide** opens the Commercial Portal User Guide

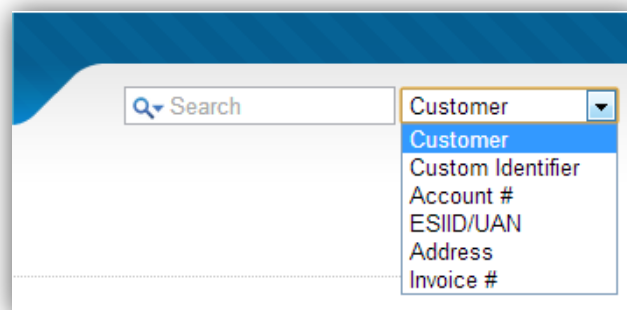
**Contact Us** redirects to the “Contact Us” page found on the GexaEnergy website. This page provides phone numbers and the link to submit questions/comments via email.

**Logout** will log out of the Commercial Portal tool.

### Searching the Portal

The search field in the top right hand corner of the webpage allows one to search for a specific item or account.

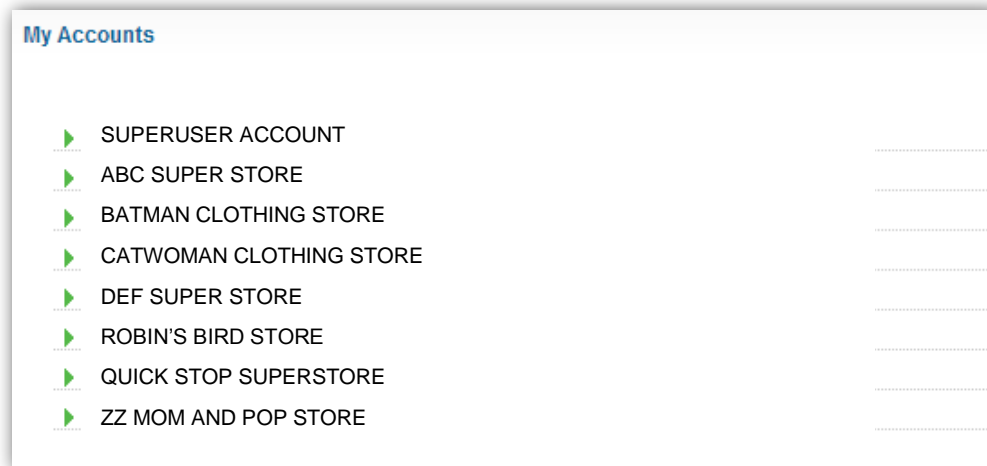
The following list shows the different search types available:



## Tab: Home

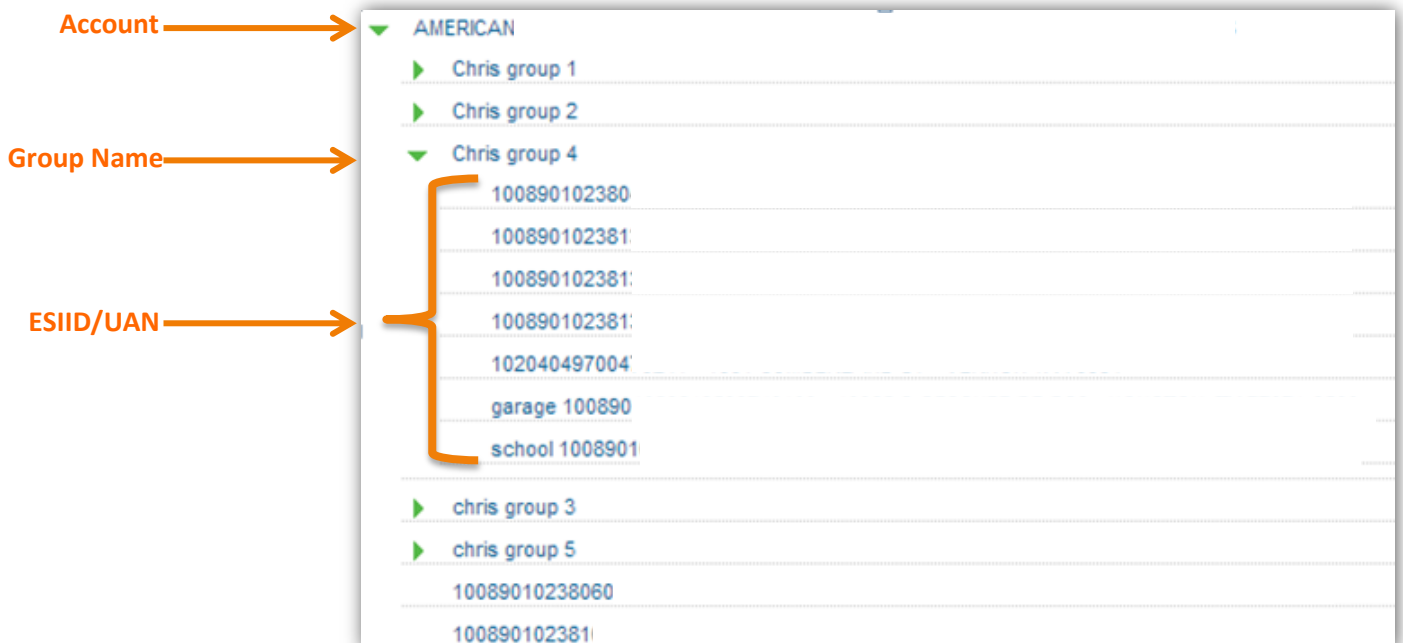


The “Home” tab will display the list accounts one have access to. If it is first time to log in to the portal, one will need to add accounts. See [“Tab: Manage Account Permissions”](#) to learn how to add accounts.



Accounts are listed in a hierarchy and in chronological order by date added. Accounts can be expanded to the next level by clicking on the green arrows.

To view the details of the level desired, click on the appropriate level you wish to view. The below shows an expanded account with groups:





Breadcrumb navigation will appear horizontally across the top of the web page. This function provides links back to each previous page that have been navigated through to get to the current page. Since the system is a hierarchical site, this provides a trail to follow back to the starting.

Typical breadcrumb:



The above example shows a view of account information summed at the Group Level named “chris group 3”.

Clicking any level on the bread crumb levels will allow you to view the details of the account without having to return to the Home Page or clicking the back arrow to do so.

Levels in the Gexa Commercial Portal:

- Account: Highest level of the billed entity. This level can contain multiple different groups billed together or contain multiple individual UAN/ESIID(s) billed together or separately.
- Groups: These are UAN/ESIID(s) grouped and billed together. These ESIIDs bills are not generated until all UAN/ESIID(s) in the group have meter reads and charges summed and billed as one.
- UAN/ESIID: These are UANs/ESSIDs on the account not billed as a group.

## Account Details

Once a level is selected, the page will move to the Account Details page. This page includes 6 sections:

1. Account Balance
2. Groups (if applicable)
3. Unassigned UAN/ESIID(s)
4. Graphs
5. Reports
6. Account Options

1. **Account Balance** will display the 3 balance categories at the level specified: Past Due, Current balance, and Total Balance.
  - a. Access the payment process by selecting either **Make Payment** or **One Time Payment**.
    1. **Make a Payment** will open the available payment options added and saved in the Commercial Portal.
    2. **One Time Payment** option allows payment with a credit card or bank account not saved in the system. This option is used if the payment option is used only once and saving for a future payment is not necessary.

Account Balance - Account Level

Past Due Balance	Current Balance	Total Balance
\$0.00	\$0.00	\$0.00

Make Payment

One Time Payment

See [Payment Accounts](#) section for more information regarding how to make a payment.

2. **Groups** will display all Groups created within an account. Click on the Group name to expand the group the UAN/ESIID(s) are listed.
  - a. Groups are used to consolidate billing among several different addresses or meters. To form a group, contact your sales representative or customer account manager and request this account organization.

Group(s)

Chris group 1

Chris group 2

Chris group 4

chris group 3

chris group 5

3. **Unassigned UAN/ESIID(s)** can be viewed all the UAN/ESIID(s) on the account that are not assigned into a consolidated billing group. The scroll bar on the right allows you to scroll to view all UAN/ESIID(s) that are unassigned.

Unassigned UAN/ESIID(s)					
Account Number	UAN / ESIID	Custom Identifier	Service Address	Status	Action
4742	1008901		HOUSTON, TX 77071	Voided	<div>Edit</div>
1129	1008901		HOUSTON TX 77076	Disconnected	<div>Edit</div>
1129	1008901			Disconnected	<div></div>

### Custom Identifiers

Click 

Edit

 to rename the ESIID/UAN with a custom identifier. This will replace the UAN number with the custom name for easier reference.

Click 

Edit

 to open the custom identifier box.

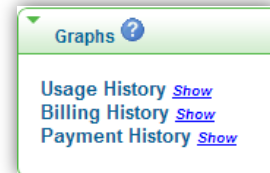
Type a name and click **Save**

Select **Edit** to delete or change your custom identifier

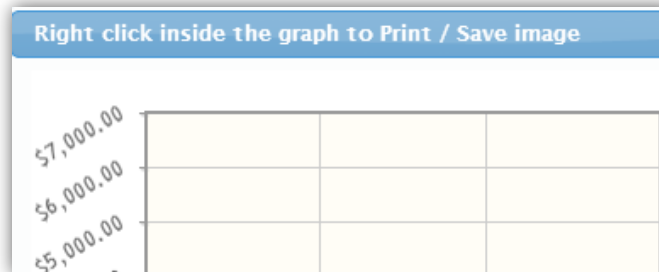
Account Number	UAN / ESIID	Custom Identifier	Service Address	Status	Action
47424-3	1008901	<input type="text"/>	DR TEMPA HOUSTON, TX 77071	Voided	<div>Save</div> <div>Cancel</div>

#### 4. Graphs

- a. The graphs provide a visual view of historical information for the account. Graphs only selectable at the group or UAN/ESIID level.

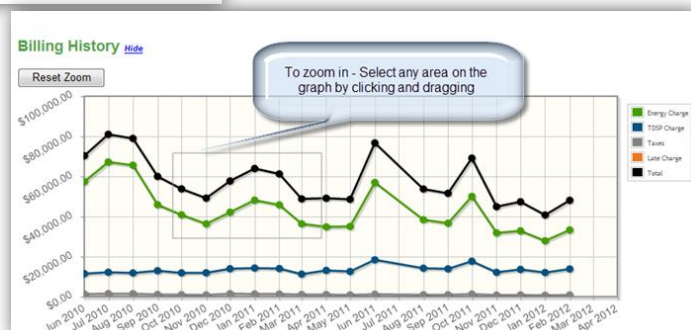
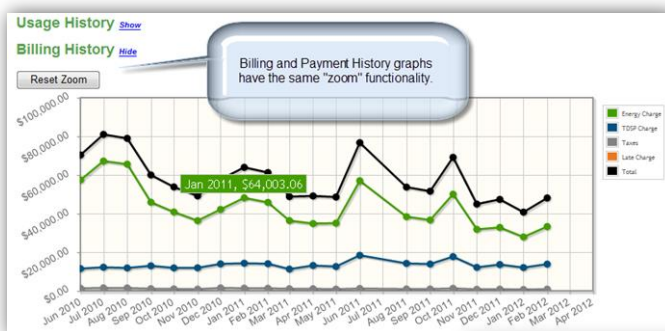


- b. Graphs can be printed and saved outside the portal.



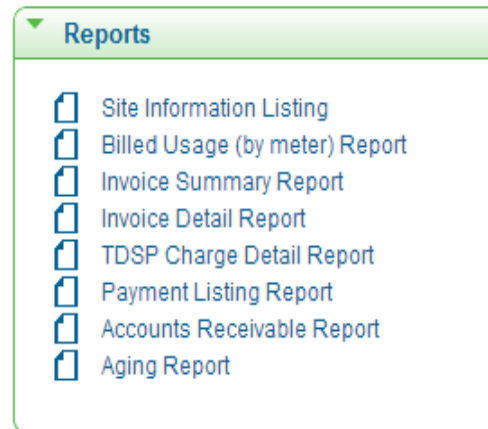
- c. Zooming on Graphs is available for Billing and Payment History Graphs with values/markers that are too close together; zoom allows one to accurately decipher the value associated.

1. Place the mouse close to the marker to zoom in on.
2. Left Click the mouse and hold.
3. Drag across the area to expand.



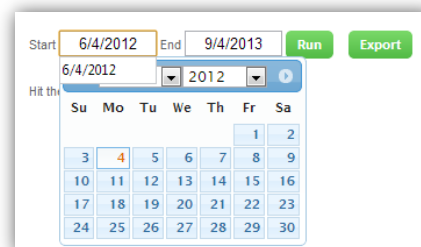
5. **Reports** can be accessed in this section at every level. To access reports, click on the report name. Below is a list and description of all reports.

- a. **Site information listing:** Displays the details of the account level chosen, including current rate.
- b. **Billed Usage Report:** Displays the usage consumption and meter read information by meter found at the selected account level
- c. **Invoice Summary Report:** Displays invoice charges in summed by charge type
- d. **Invoice Detail Report:** Displays the individual charges and taxes on each invoice
- e. **TDSP Charge Detail Report:** Displays the individual TDSP charges per UAN/ESID of the account level selected
- f. **Payment Listing Report:** Displays the payments made to the account at the level selected
- g. **Accounts Receivable Report:** Displays the charges and payments in order of invoiced date for the account level selected
- h. **Aging report:** Displays the age and amount totals of any past due amounts on the account level selected by age group



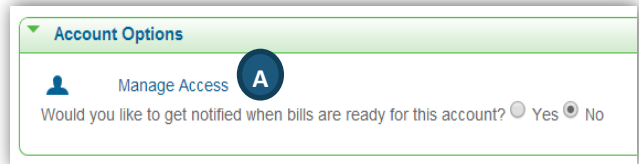
Some reports require a date range for the data requested.

1. Select the date range
2. Select **Run** to view the report on the Portal
3. Or Select **Export** export to view in Excel
4. Data exported can be saved to User's computer.



## 6. Account Options

- a. **Manage Access** gives the ability to grant and manage access to other Portal users.



The 'Account Options' dialog box has a green header. Below the header, there is a 'Manage Access' link with a user icon and a blue circle containing the letter 'A'. At the bottom, there is a question: 'Would you like to get notified when bills are ready for this account?' followed by 'Yes' and 'No' radio buttons. The 'No' button is selected.

Access can be granted at the Account Level, Group Level and ESIIDs/UAN Level.

**Note: Only the Primary User on the account can grant other users access.**

To add a new user see "[Manage Account Permissions](#)"; (username will need to be known)

To manage access for current users with access to the account already select



1. Click on Manage Access
2. All users who have been added to the account will be listed on this page (to add a user to the account refer to the Manage Account Permission tab)
3. Click the box to grant that right to the user. More than one kind of access can be selected.

*The legend describes the actions and permissions.*

My Accounts >> AMERICAN OPPORTUNITY FOR HOUSING-MEADOWCREEK, LLC DBA BRIARCREEK APT >> Manage Access						
	View Account	Add User	Control User Permissions	Make Payments	Rename ESIID/UAN	Add/Drop
Primary	✓	✓	✓	✓	✓	✓
Read Only	✓					
Payments	✓			✓		
Rename ESIID/UAN	✓				✓	
Add/Drop	✓					✓

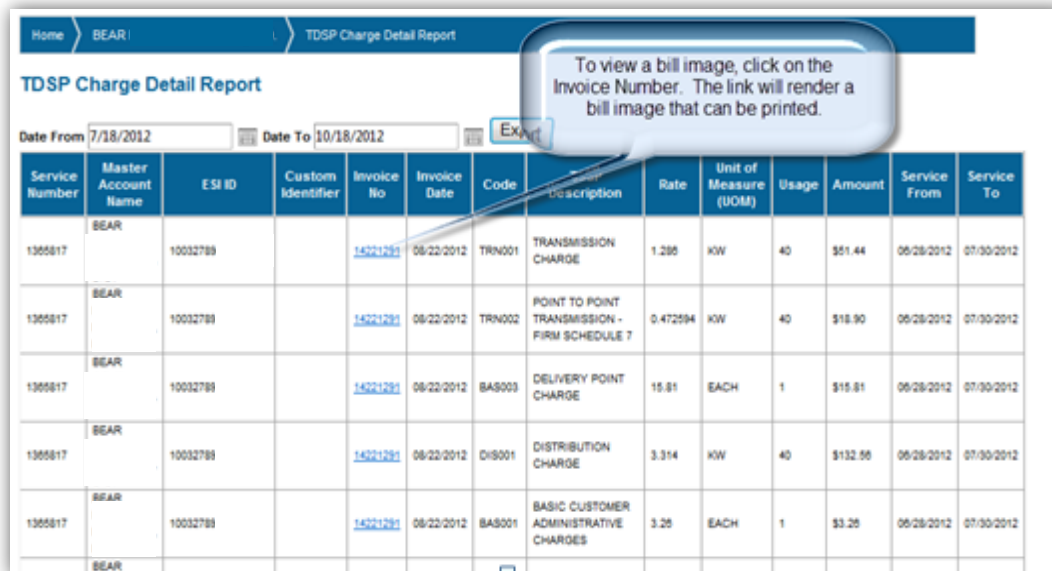
User	Read Only	Primary	Payment	Rename ESIID/UAN	Add/Drop
Derek Miller	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## View Bill Image

View bills from any of the following reports by clicking on the blue Invoice Number:

- **Invoice Summary Report**
- **Invoice Detail Report**
- **TDSP Charge Detail Report**

The hyperlink of the Invoice Number will render a PDF image of the bill.



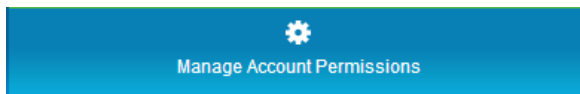
Home BEAR TDSP Charge Detail Report

**TDSP Charge Detail Report**

Date From 7/18/2012 Date To 10/18/2012 Export

Service Number	Master Account Name	ESI ID	Custom Identifier	Invoice No	Invoice Date	Code	Description	Rate	Unit of Measure (UOM)	Usage	Amount	Service From	Service To
1365817	BEAR	10032789		<a href="#">14321291</a>	06/22/2012	TRN001	TRANSMISSION CHARGE	1.286	KW	40	\$51.44	06/26/2012	07/30/2012
1365817	BEAR	10032789		<a href="#">14321291</a>	06/22/2012	TRN002	POINT TO POINT TRANSMISSION - FIRM SCHEDULE 7	0.472594	KW	40	\$18.90	06/26/2012	07/30/2012
1365817	BEAR	10032789		<a href="#">14321291</a>	06/22/2012	BAS003	DELIVERY POINT CHARGE	15.81	EACH	1	\$15.81	06/26/2012	07/30/2012
1365817	BEAR	10032789		<a href="#">14321291</a>	06/22/2012	DIS001	DISTRIBUTION CHARGE	3.314	KW	40	\$132.56	06/26/2012	07/30/2012
1365817	BEAR	10032789		<a href="#">14321291</a>	06/22/2012	BAS001	BASIC CUSTOMER ADMINISTRATIVE CHARGES	3.26	EACH	1	\$3.26	06/26/2012	07/30/2012
BEAR													

## Tab: Manage Account Permissions



The second tab to Manage Account Permissions is where you:


1. Add or Drop an account to the User Profile

### 1. Add an Account:

- a. New customers will receive a Welcome letter via email, with the account pin number.
- b. Click on the link and provide the PIN Number and one UAN/ESIID from the account that needs to be added.
- c. Once the account is added, it is viewable on the Homepage.
- d. If the account has already been added by another commercial portal user, they are automatically granted the Primary user. **Only two Primaries can exist per account.** If one attempts to add an account with a Primary already granted, the request will be answered with an error message. The User will not be able to add the account unless the other primary user grants them access.

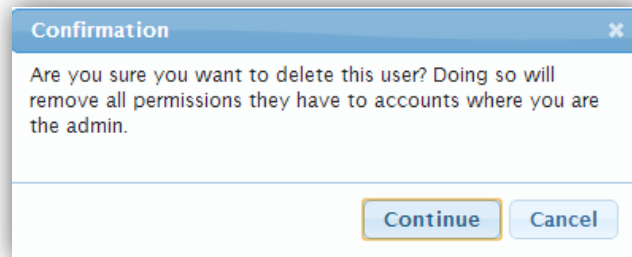
A screenshot of a web form titled "Add Entity/Company to your profile". Below the title is a breadcrumb link "Manage My Accounts >> Add Account". A red error message "There is already an admin on this account" is displayed with an orange arrow pointing to it. Below the error is a green instruction: "Please enter the information below to add a Company to your profile". The form contains two input fields: "Entity ID/PIN" with the value "6610" and "Utility Account#" with the value "100890". A green "Add" button is at the bottom.

### 2. Add/Delete User: Officially, this is the first step to granting other Users access

- a. Click on the [Add/Delete User](#) link
- b. To add a user, enter their **Username** and click the  button

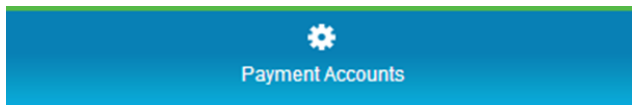
A screenshot of a web form titled "Enter username to add". Below the title is a small asterisked note: "\*Visit the Manage Access page to assign permission levels. The user will not have access until this is completed." There is an input field containing the username "chatcher" and a green "Add User" button. At the bottom, there is a user profile summary for "Christa Hatcher" with a "Delete" link next to it.

- c. To remove a User from the list, choose [Delete](#) next to that person's name.
  - 1. Deleting a User from this list will remove any permission granted at the Account level.



- 2. A warning will appear before deleting
- d. Remove a user's access at the Account level by unclicking the permissions on the [Manage Account Permissions](#) Tab without deleting the User.

## Tab: Payment Accounts



The Payment Accounts tab allows the bank account or credit card information to be saved to make multiple payments without re-entering the same information for each payment made.

Payment accounts can only be accessed by the User that adds them in their payment account tab. Users with access to the same Customer Accounts cannot access or use these payment accounts (unless the second user enters the same payment accounts to their user profile).

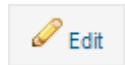
The Payment Accounts tab shows saved payment methods.

My Payment Accounts					
Payment Methods					
<a href="#">Add New Payment Account</a>					
Type	Your Credit Cards and eChecks	Name on Account	Expiration Date		
Credit Card	AmericanExpress ending in 3387	Jenny L Aday	01/2020	Edit	Delete
Credit Card	Visa ending in 6348	Sam Wheat	01/2016	Edit	Delete
eCheck	eCheck ending in 7894	John Smith	NA		Delete

To **delete** a payment account, select [Delete](#) next to the payment account.



To **update information** on the payment account, select



next to the payment account that requires updates.

To **add** a new payment account, click on the link [Add New Payment Account](#)

- Select the payment method from the drop down:

A dropdown menu titled "Select a payment method" with a list of options: eCheck, eCheck, Visa, MasterCard, Discover, and AmericanExpress. The first "eCheck" option is highlighted in blue.

- Based on the option selected, the screen will prompt to provide the relevant payment information
- Select **Add** when complete and the payment account will be added to the payment account list

A form titled "Select a payment method" with a dropdown menu set to "eCheck". Below the dropdown is a section titled "e-Check Information" in green. It contains four text input fields: "Bank Account Number", "Routing Number", "Name on the bank account", and "Zip Code". At the bottom of the form is a green "Add" button.

## Making Payments

To make a payment, select the Account the payment should be applied.

Select the level in the account by clicking the green arrows to drill down.

## Account Balance

Balance due can be seen in the “Account Balance” Section. Choose the amount to pay:

Past Due Balance	Current Balance	Total Balance
\$282.16	\$0.00	\$282.16

[Make Payment](#) [One Time Payment](#) [Auto Bill Pay](#)

- **Past Due Balance:** This reflects a billed amount not paid and the due date has passed.
- **Current Balance:** This reflects a billed amount with the due date still in the future.
- **Total Balance:** This is the total amount that has been billed and is due for payment.

## Payment Options

[Make Payment](#) opens the available payment options saved.

[One Time Payment](#) Allows payment with a credit card or bank account not been saved in the system. This option is used for one time payments and saving for future payments is not required.

[Auto Bill Pay](#) Schedules the amount due to automatically draft from the banking account or credit card specified on the due date until it is canceled. Set up of Auto Bill Pay only has to be done once.

To set up Auto Bill Pay, select from one of the saved accounts (below) and then select [Update ABP](#) . If a different payment account other than those available is used for the Auto Bill Payment, the new credit card or bank account needs to be added under payment options first before setting up Auto Bill Payment.

Select a payment account to sign up for auto bill pay or deselect a payment account to opt out of auto bill pay.

Type	Your Credit Cards and eChecks	Name on Account	Expiration Date	
<input type="radio"/>	eCheck	eCheck ending in 7894	John Smith	NA

[Update ABP](#) [Opt out of ABP](#)

After completion of setting up the Auto Bill Pay option, a confirmation message will appear

The account - 3387 displayed below has been successfully added as your Auto Bill Pay Account. Please note that payments will be auto-drafted each month on the due date.

\*\*\*\* \* 3387  
01/20  
JENNY L ADAY

[OK](#)

## Payment Account Regulations

- Only accounts that are specified as “Small Commercial” will be allowed to use credit cards to make payments.
  - Bank accounts and credit cards can be added to payment accounts but they will not work to make a payment.
  - If credit card payment is attempted on a Large Commercial account, credit card payment accounts will not be visible for selection.
- MasterCard, VISA, and Discover Cards do not have a limit or max that can be charged.
- AMEX has a \$3000.00 limit for a 30 calendar day period.
  - Multiple payments using the same or different American Express cards can be made as long as the sums charged between the accounts do not exceed \$3000.00 per 30 calendar days.
- The Customer will receive the following error message if they attempt to exceed this limit:

You have exceeded the amount that can be paid using American Express for this month

## Processing a Payment

After selecting the amount to pay and payment method, they proceed to [Review Payment](#).

The next page will display how the payment amount will be distributed across the account for multiple UAN/ESIID(s).

*Payments will apply to the oldest billed date first to the youngest billed date, and then apply to smallest amounts to largest amounts.*

The payment allocation page will be shown before processing the payment:

Account #	UAN	Address	Past Due	Current Due	Total Due	Amount Applied	Balance
99282-3	10089010	BS8HOUSTON TX 77042	\$62.76	\$0.00	\$62.76	\$62.76	\$0.00
99278-3	10089010	BS4HOUSTON TX 77042	\$76.73	\$0.00	\$76.73	\$76.73	\$0.00
99273-3	10089010	BS1HOUSTON TX 77042	\$121.55	\$0.00	\$121.55	\$121.55	\$0.00
99276-3	10089010	BS2HOUSTON TX 77042	\$114.67	\$0.00	\$114.67	\$114.67	\$0.00
99277-3	10089010	BS3HOUSTON TX 77042	\$145.03	\$0.00	\$145.03	\$145.03	\$0.00
99281-3	10089010	BS5HOUSTON TX 77042	\$174.45	\$0.00	\$174.45	\$174.45	\$0.00
99283-3	10089010	BS7HOUSTON TX 77042	\$717.35	\$0.00	\$717.35	\$717.35	\$0.00
Total			\$1,412.54	\$0.00	\$1,412.54	\$1,412.54	\$0.00

[Cancel](#) [Make Payment](#)

**Select Payment Amount**

☐ Past Due Amount: \$1,000.00

☐ Total Amount Due: \$1,000.00


☒ Other Amount:

**Select Payment Method**

Type	Your Credit Cards and eChecks	Name on Account	Expiration Date
<input checked="" type="radio"/> eCheck	eCheck ending in 7894	John Smith	NA

[Review Payment](#)

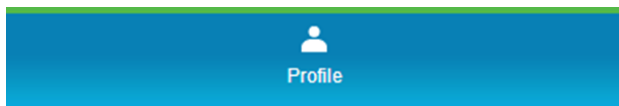
When a payment is successfully received, the following confirmation message will return:

 **Confirmation #: 1317813**

Payment of \$1,412.54 was successfully applied to AMERICAN I

[Back to Account](#)


## Tab: Profile

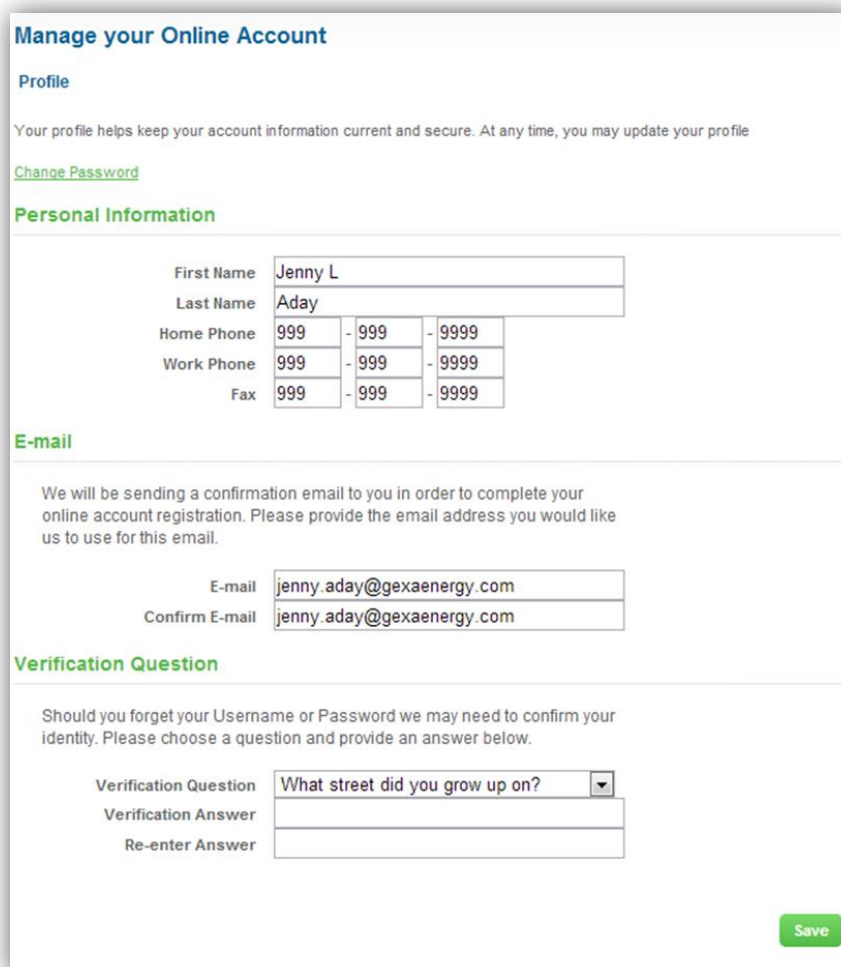


The Profile tab is used to update or change the User Profile information on file.

Can edit/change:

- Password
- Personal Information (name, phone#)
- Email
- Verification Question and answer

After changes are made, select  .



**Manage your Online Account**

**Profile**

Your profile helps keep your account information current and secure. At any time, you may update your profile

[Change Password](#)

**Personal Information**

First Name	Jenny L		
Last Name	Aday		
Home Phone	999	- 999	- 9999
Work Phone	999	- 999	- 9999
Fax	999	- 999	- 9999

**E-mail**

We will be sending a confirmation email to you in order to complete your online account registration. Please provide the email address you would like us to use for this email.

E-mail	jenny.aday@gexaenergy.com
Confirm E-mail	jenny.aday@gexaenergy.com

**Verification Question**

Should you forget your Username or Password we may need to confirm your identity. Please choose a question and provide an answer below.

Verification Question	What street did you grow up on? ▼
Verification Answer	
Re-enter Answer	

