Gexa Commercial Portal

User Guide

Version 1.8

Gexa Energy®

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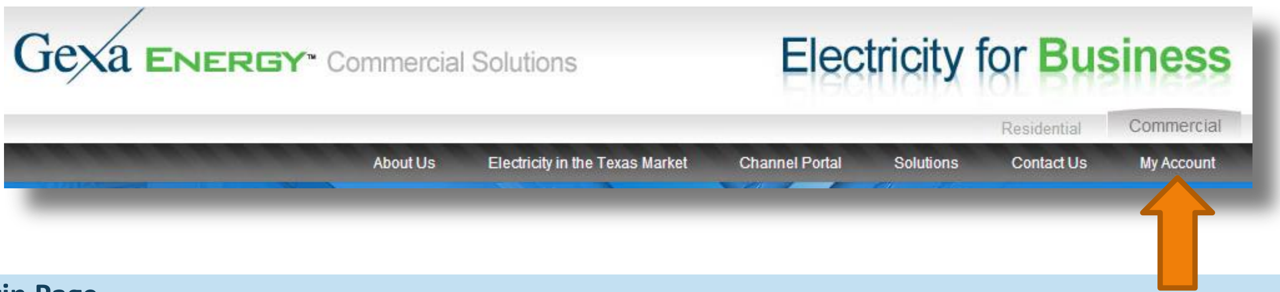
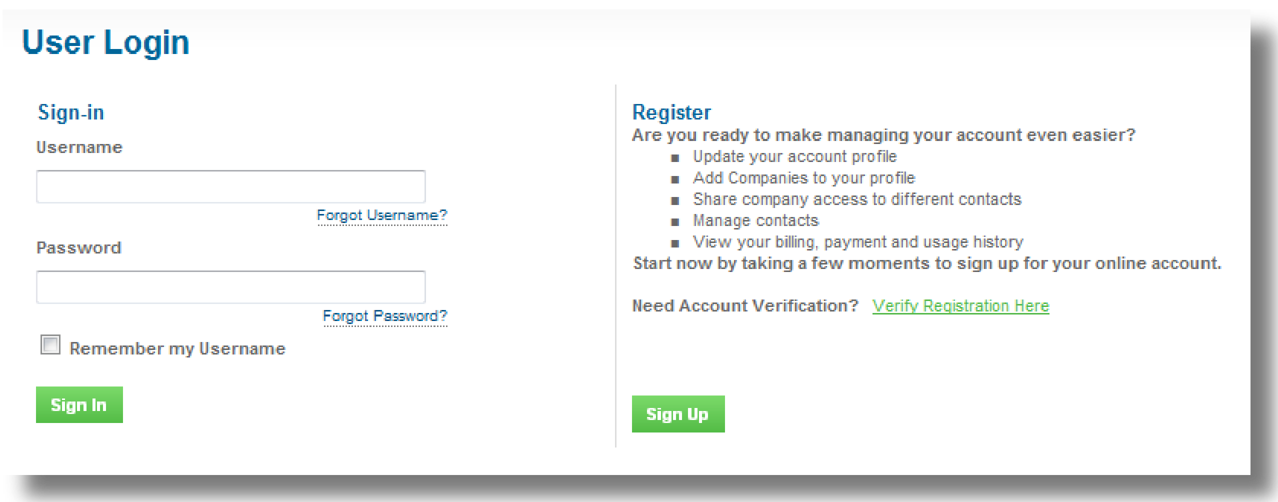
Accessing the Commercial Portal

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 **Sign Up** 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.

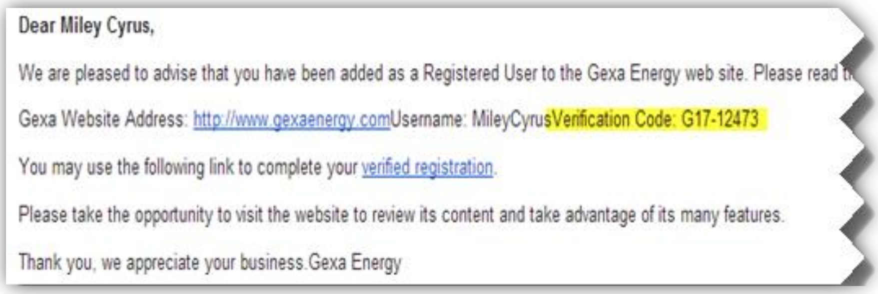
Select **Create** after accepting the terms and completing the form.

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.

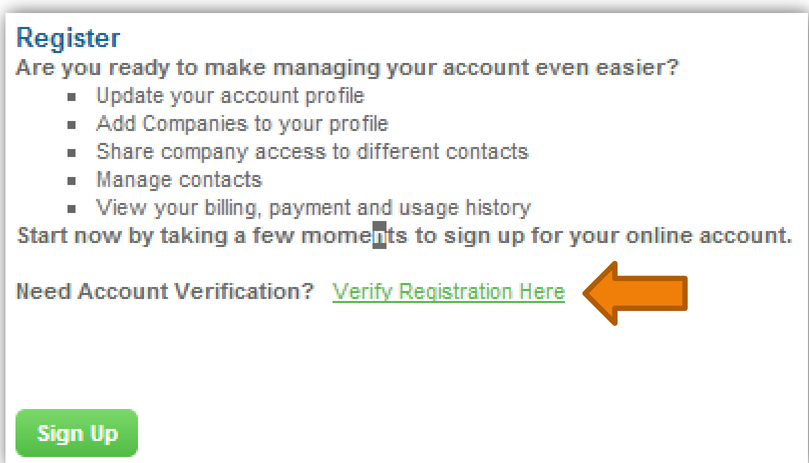
The email will contain a code (highlighted below) that must be entered in the portal before one can proceed. Access the verification page three ways

1) By clicking "verified registration" link provided in the email

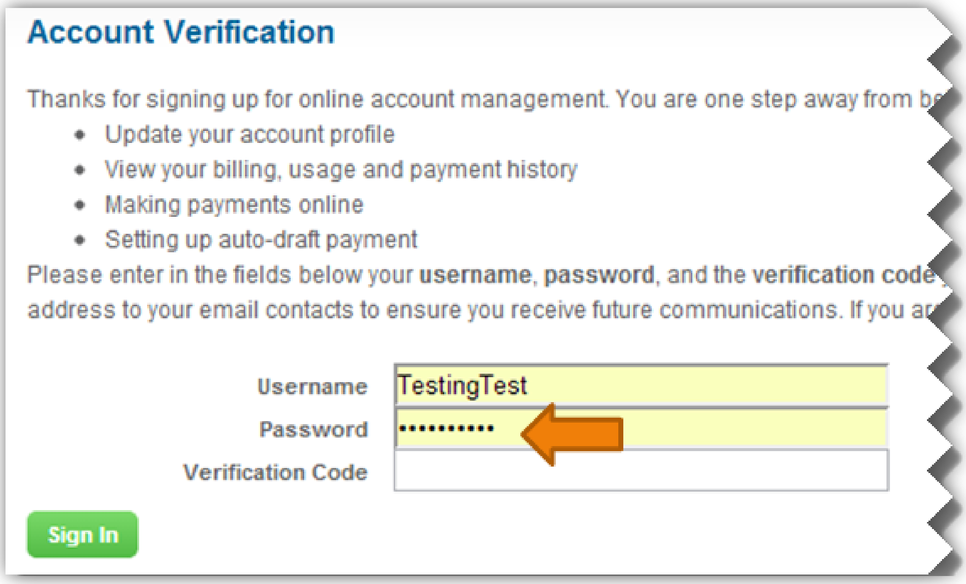


2) By clicking on "continue" the registration will verify

3) Or by selecting "<u>Verify Registration Here</u>" on the Login Page

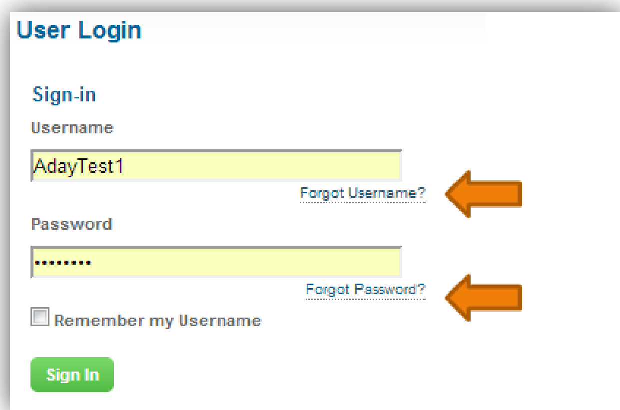


Type in the account verification code received in the registration email:

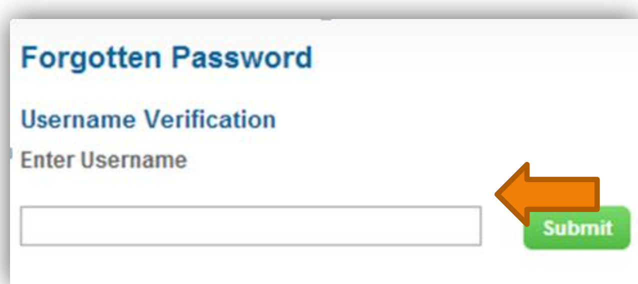


Forgot Username and/or Password

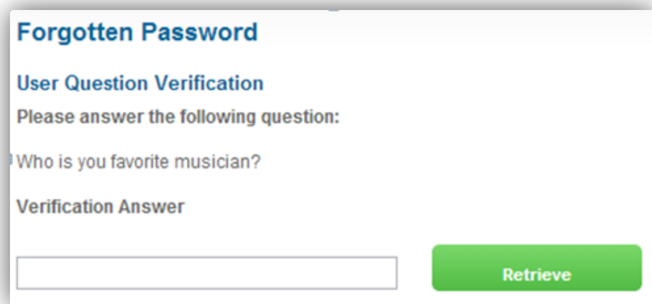
1) Click on the appropriate link on the user login page if the login is forgotten



2) Enter username



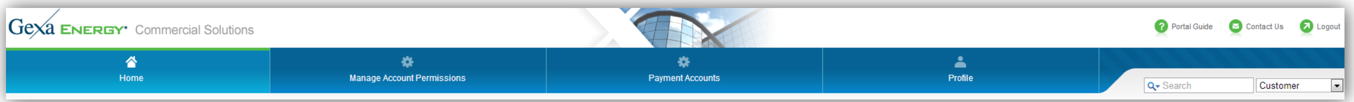
3) Enter the answer to the security question chosen during registration



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

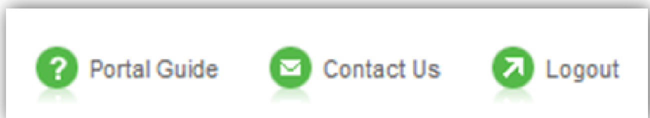
Portal Menu



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

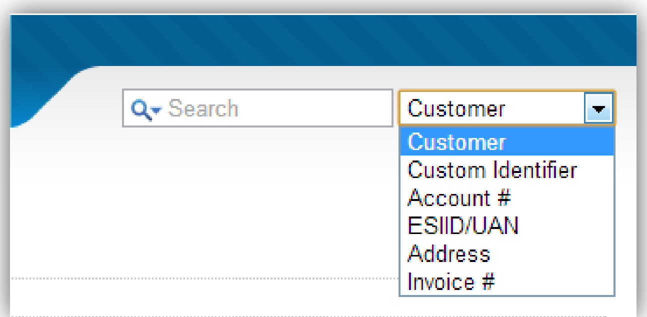
Contact Us redirects to the “Contact Us” page found on the GexaEnergy website. This page provides phone numbers and the link to submit questions/comments via email.

Logout will log out of the Commercial Portal tool.

Searching the Portal

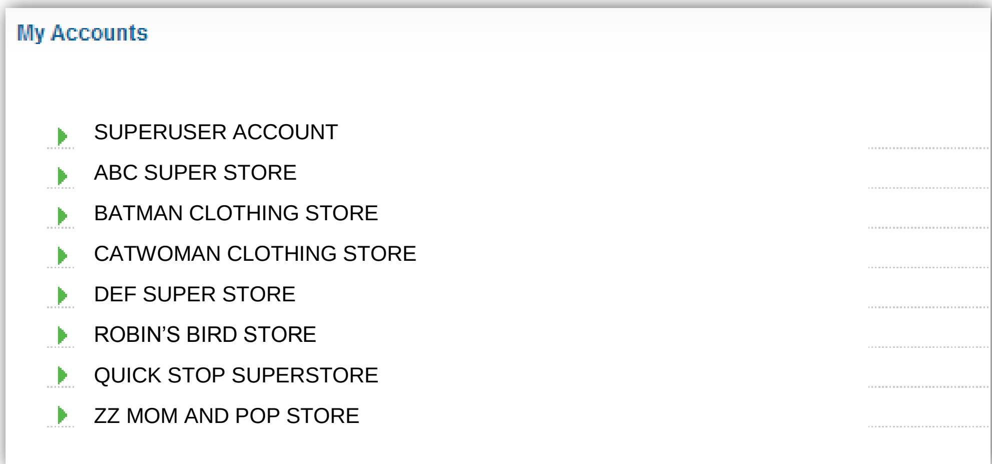
The search field in the top right hand corner of the webpage allows one to search for a specific item or account.

The following list shows the different search types available:



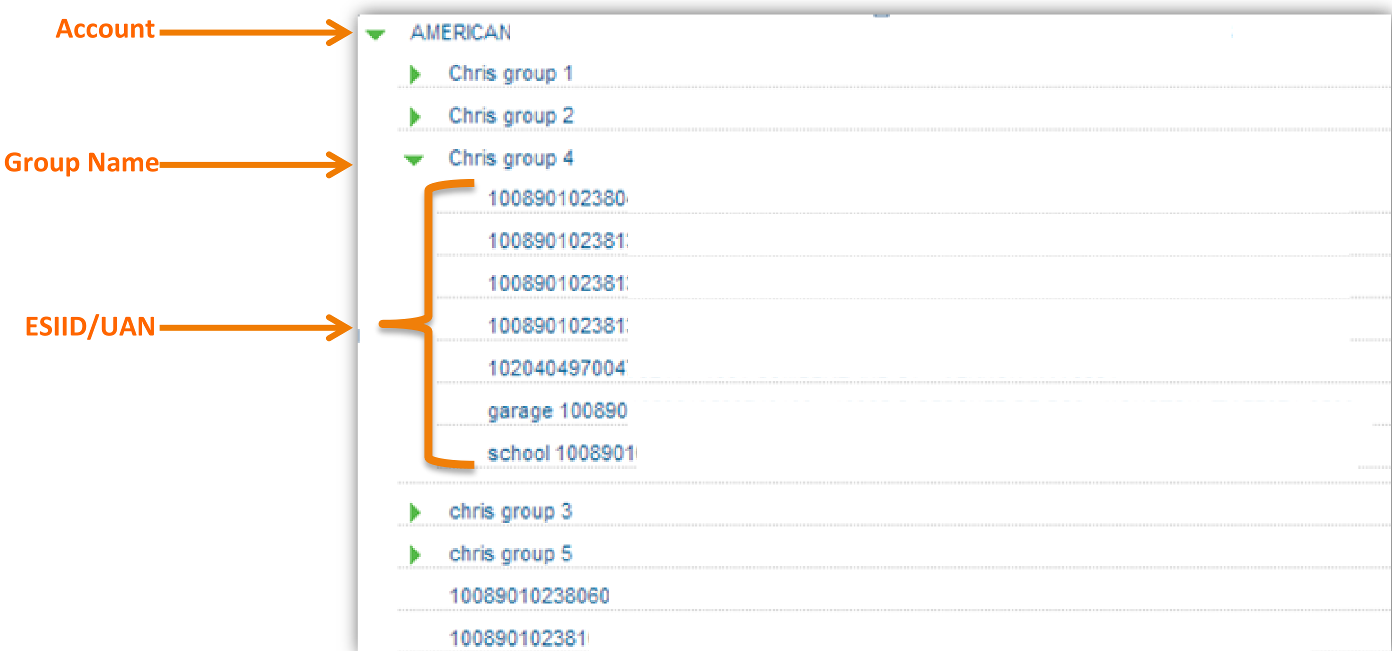
Tab: Home

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:

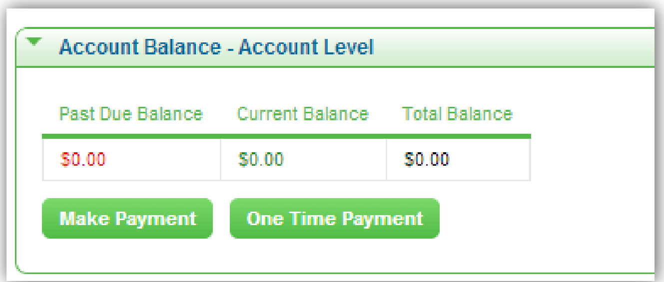
- Account: Highest level of the billed entity. This level can contain multiple different groups billed together or contain multiple individual UAN/ESIID(s) billed together or separately.
- Groups: These are UAN/ESIID(s) grouped and billed together. These ESIIDs bills are not generated until all UAN/ESIID(s) 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:

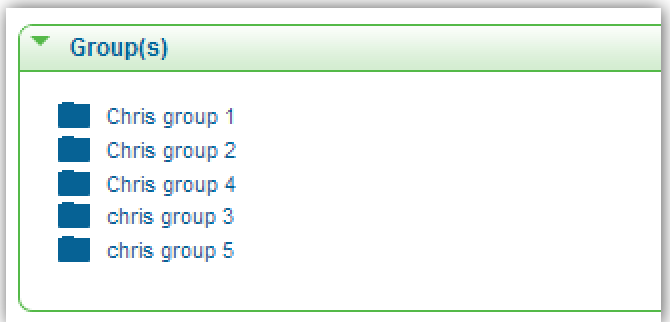
1. Account Balance
2. Groups (if applicable)
3. Unassigned UAN/ESIID(s)
4. Graphs
5. Reports
6. Account Options

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.

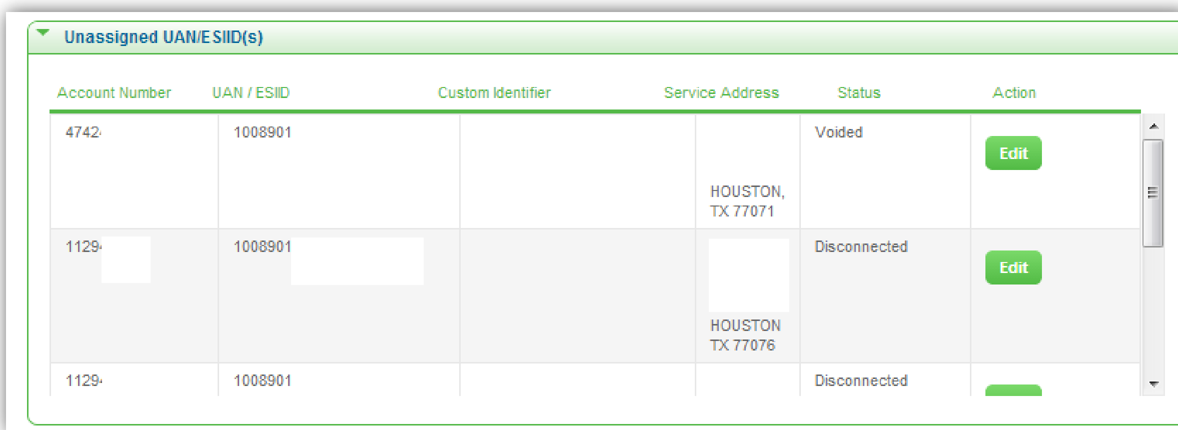


See [Payment Accounts] section for more information regarding how to make a payment.

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.



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.



Custom Identifiers

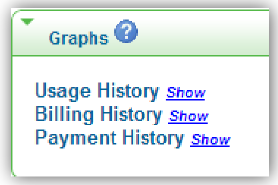
Click Edit to rename the ESIID/UAN with a custom identifier. This will replace the UAN number with the custom name for easier reference.

Click Edit to open the custom identifier box.

Type a name and click Save

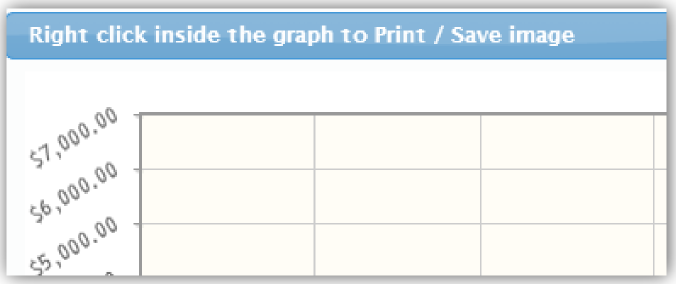
Select Edit to delete or change your custom identifier

4. Graphs



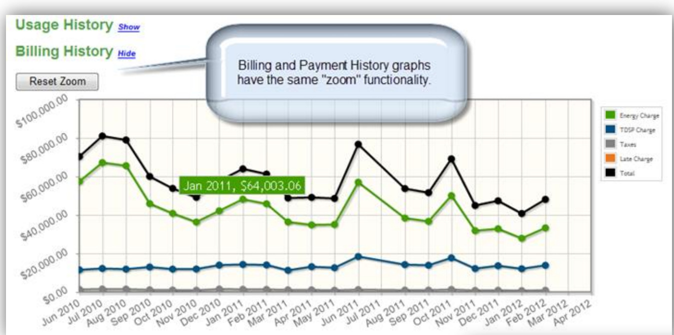
a. The graphs provide a visual view of historical information for the account. Graphs only selectable at the group or UAN/ESIID level.

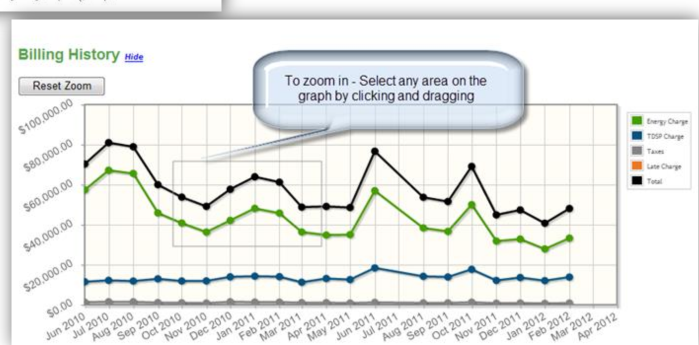
b. Graphs can be printed and saved outside the portal.



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.

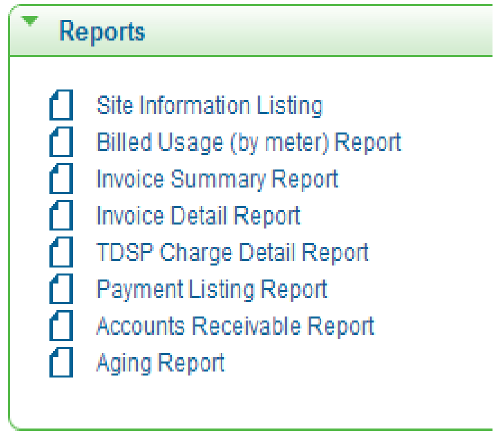
1. Place the mouse close to the marker to zoom in on.
2. Left Click the mouse and hold.
3. Drag across the area to expand.





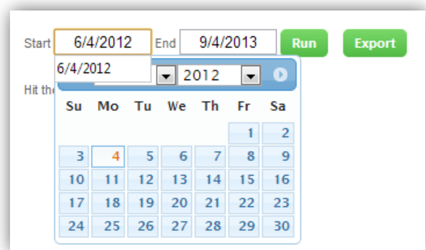
5. **Reports** can be accessed in this section at every level. To access reports, click on the report name. Below is a list and description of all reports.

    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



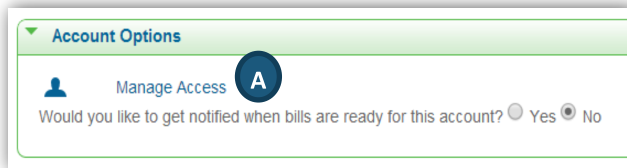
Some reports require a date range for the data requested.

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.



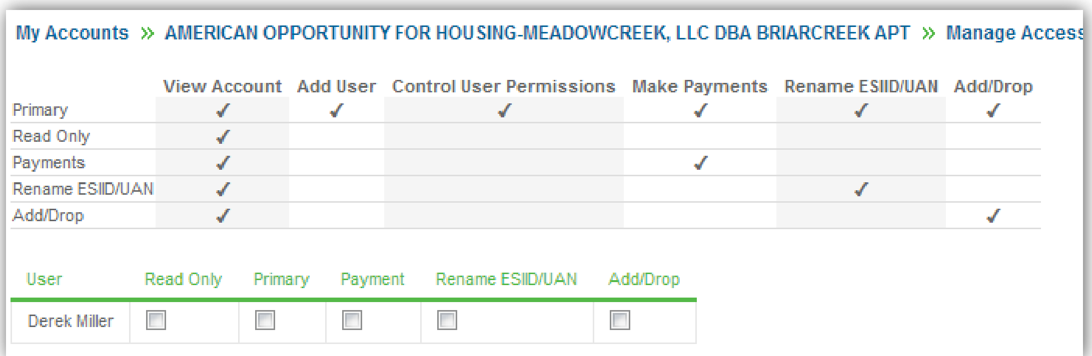
Access can be granted at the Account Level, Group Level and ESIIDs/UAN Level.
Note: Only the Primary User on the account can grant other users access.

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 A

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.



	View Account	Add User	Control User Permissions	Make Payments	Rename ESIID/UAN	Add/Drop
Primary	✓	✓	✓	✓	✓	✓
Read Only	✓					
Payments	✓			✓		
Rename ESIID/UAN	✓				✓	
Add/Drop	✓					✓

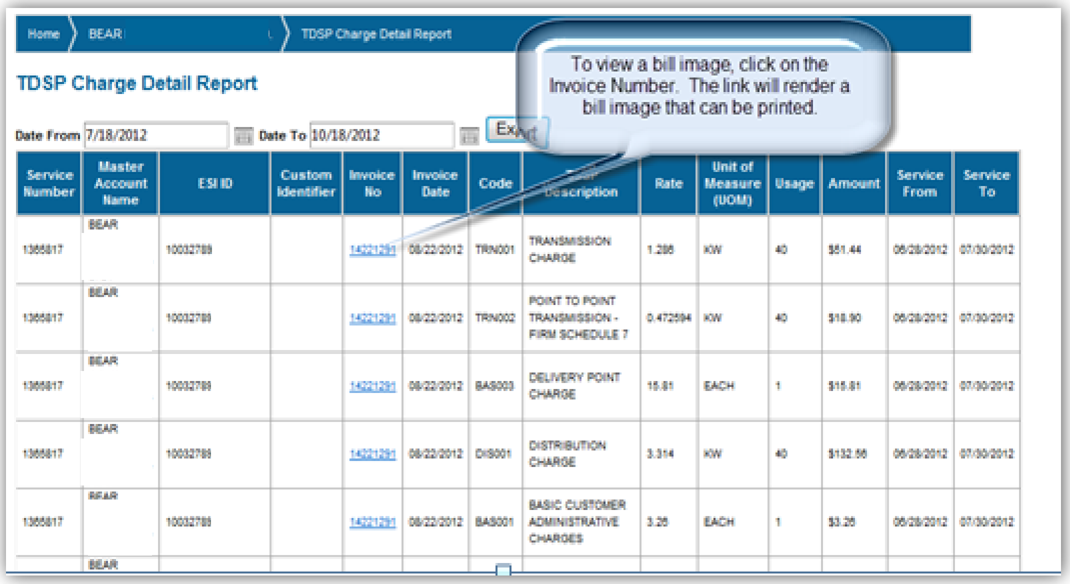
User	Read Only	Primary	Payment	Rename ESIID/UAN	Add/Drop
Derek Miller	☐	☐	☐	☐	☐

View Bill Image

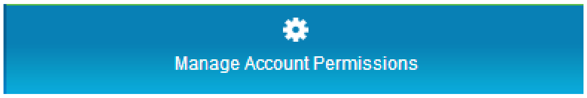
View bills from any of the following reports by clicking on the blue Invoice Number:

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

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



Tab: Manage Account Permissions



The second tab to Manage Account Permissions is where you:

1. Add or Drop an account to the User Profile

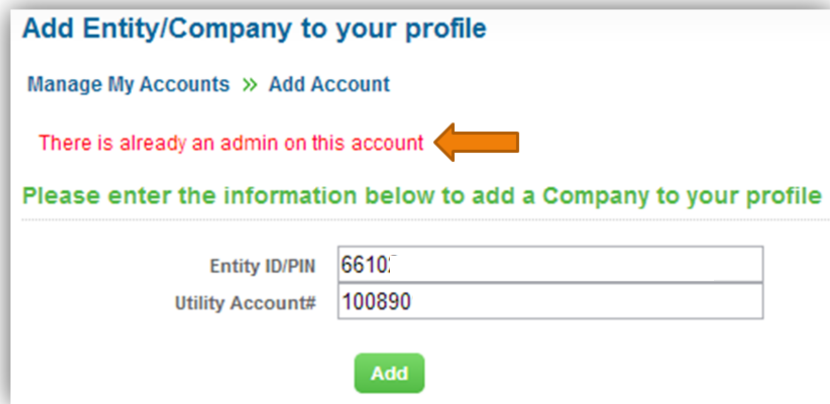
1. Add an Account:

   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.

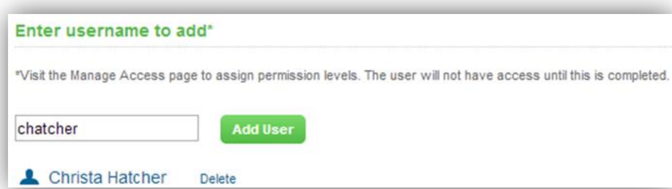
   d. If the account has already been added by another commercial portal user, they are automatically granted the Primary user. **Only <u>two</u> Primaries can exist per account.** If one attempts to add an account with a Primary already granted, the request will be answered with an error message. The User will not be able to add the account unless the other primary user grants them access.



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

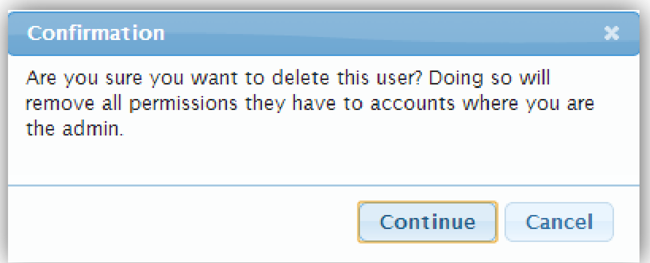
   a. Click on the Add/Delete User link

   b. To add a user, enter their **Username** and click the  button



c. To remove a User from the list, choose **Delete** next to that person's name.

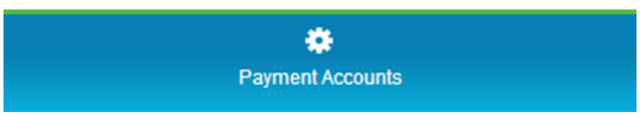
1. Deleting a User from this list will remove any permission granted at the Account level.



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.

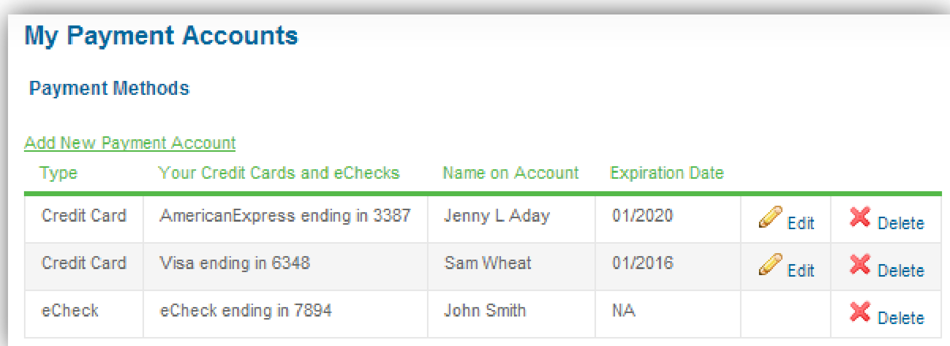
Tab: Payment Accounts



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.

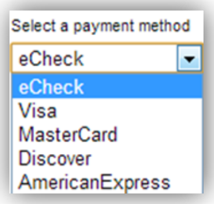


To **delete** a payment account, select Delete next to the payment account.

To **update information** on the payment account, select Edit next to the payment account that requires updates.

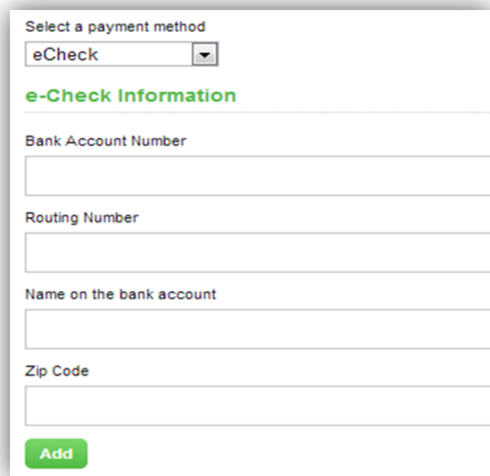
To **add** a new payment account, click on the link Add New Payment Account

- Select the payment method from the drop down:



- 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



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:** 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.

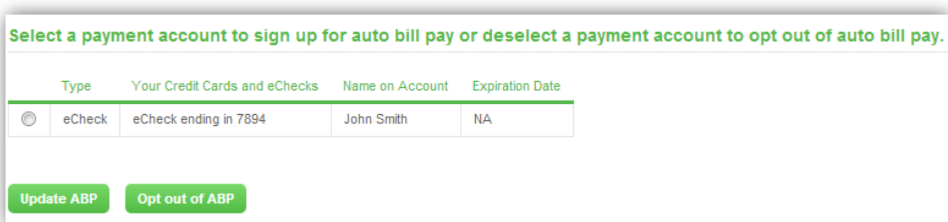
Payment Options

Make Payment opens the available payment options saved.

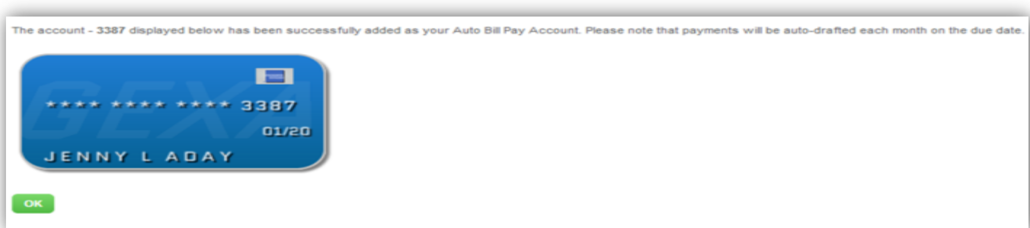
One Time Payment Allows payment with a credit card or bank account not been saved in the system. This option is used for one time payments and saving for future payments is not required.

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.

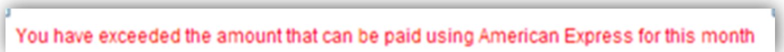


After completion of setting up the Auto Bill Pay option, a confirmation message will appear



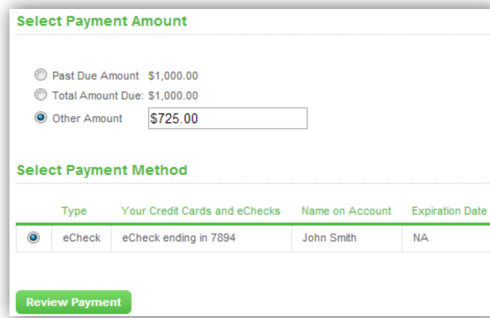
Payment Account Regulations

- 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:



Processing a Payment

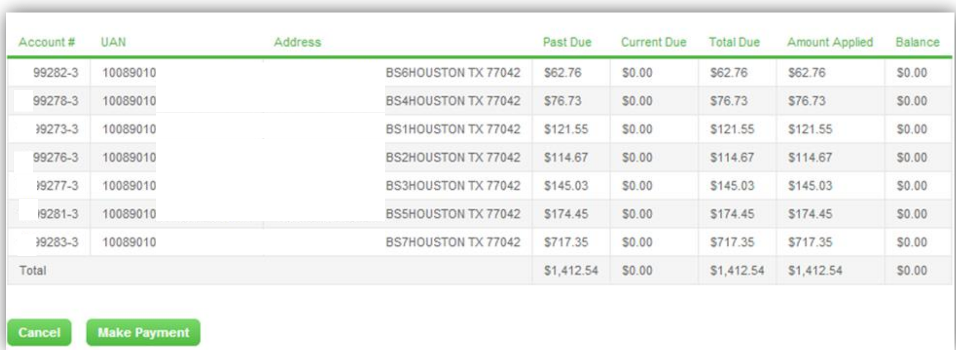
After selecting the amount to pay and payment method, they proceed to Review Payment.



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.

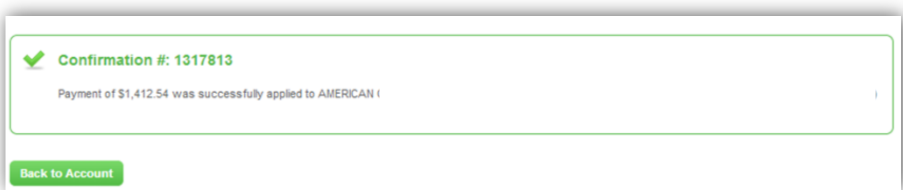
The payment allocation page will be shown before processing the payment:



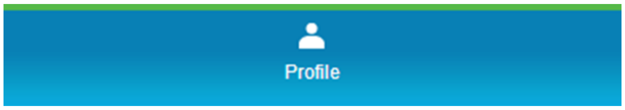
Account #	UAN	Address	Past Due	Current Due	Total Due	Amount Applied	Balance
99282-3	10089010	BS6HOUSTON TX 77042	$62.76	$0.00	$62.76	$62.76	$0.00
99278-3	10089010	BS4HOUSTON TX 77042	$76.73	$0.00	$76.73	$76.73	$0.00
9273-3	10089010	BS1HOUSTON TX 77042	$121.55	$0.00	$121.55	$121.55	$0.00
99276-3	10089010	BS2HOUSTON TX 77042	$114.67	$0.00	$114.67	$114.67	$0.00
9277-3	10089010	BS3HOUSTON TX 77042	$145.03	$0.00	$145.03	$145.03	$0.00
9281-3	10089010	BS5HOUSTON TX 77042	$174.45	$0.00	$174.45	$174.45	$0.00
9283-3	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

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



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 

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