

# Process a Payment on the Merchant Gateway

Last Modified on 01/09/2026 5:50 pm EST

## Update/Verify Energy Force Prior to Processing Payment

The Customer Vault ID *must* be setup in Energy Force *prior* to processing the sale in the **Automatic Payment Type** menu in Energy Force

The screenshot displays the Energy Force Merchant Gateway interface. On the left, a form shows account balances: Current Balance (\$137.88), 30 Day Balance (\$0.00), 60 Day Balance (\$0.00), 90 Day Balance (\$0.00), and Total Balance (\$137.88). Below this is the 'Call In History' section with fields for Last Payment Date (01/11/21), Last Payment Amount (\$95.99), Last Statement Balance (\$137.88), Last Statement Date (11/30/21), and Bill To (54683). A blue bar at the bottom of the main form reads 'DUE UPON RECEIPT'. On the right, a modal dialog titled 'Automatic Payment Type' is open. It contains a text field for 'Customer Vault ID' with the value '54683', a dropdown for 'Automatic Payment Type', and a message: 'Please select the automatic payment type. Customer must have payment method set up in portal to process payments.' Below the message are 'Modify' and 'Cancel' buttons. At the bottom of the dialog is a 'Safety Info Received Date' field with the value '00/00/00'. An orange arrow points from the 'Automatic Payment Type' button in the main form to the 'Automatic Payment Type' dialog box.

Current Balance	\$137.88
30 Day Balance	\$0.00
60 Day Balance	\$0.00
90 Day Balance	\$0.00
<b>Total Balance</b>	<b>\$137.88</b>

**Call In History**

Last Payment Date	01/11/21
Last Payment Amount	\$95.99
Last Statement Balance	\$137.88
Last Statement Date	11/30/21
Bill To	54683

**Automatic Payment Type**

Customer Vault ID: 54683

Automatic Payment Type

Please select the automatic payment type.  
Customer must have payment method set up in portal to process payments.

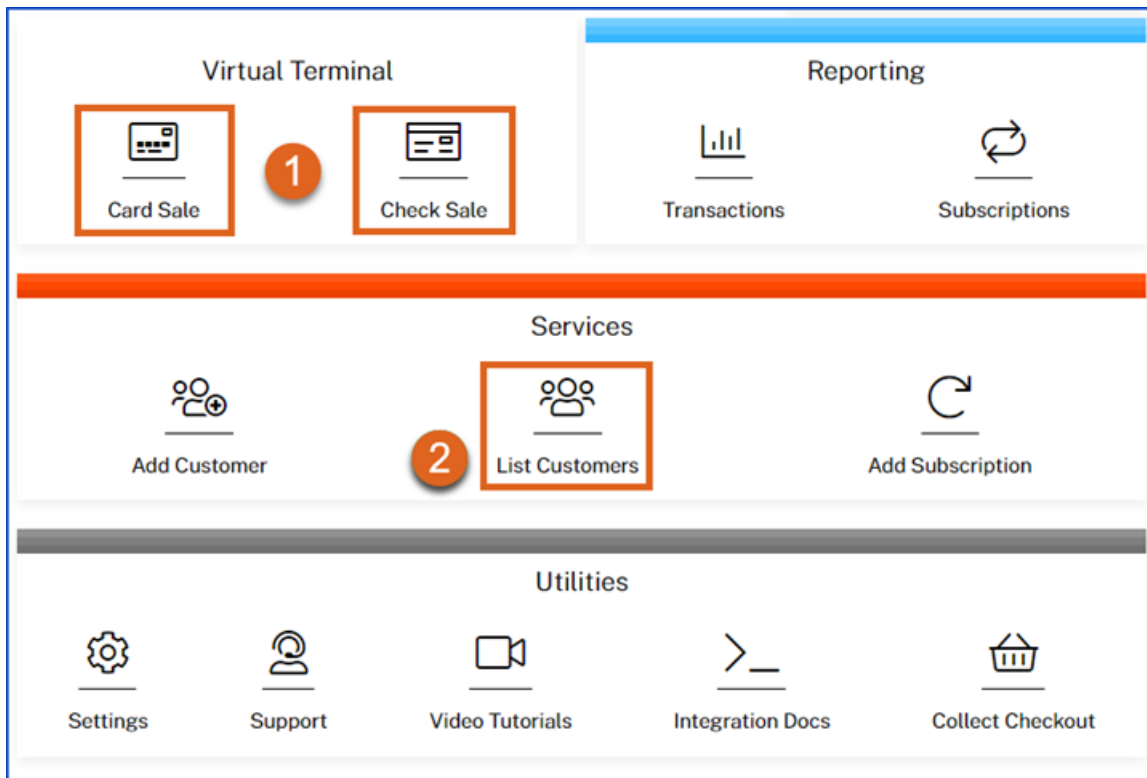
Modify Cancel

Safety Info Received Date 00/00/00

**Note:** It is recommended to match the Customer Vault ID to the Energy Force Customer #.

## There are two options to post a payment on the Merchant Gateway

1. Virtual Terminal Sale
2. Customer Vault



## Virtual Terminal Sale

In the Virtual Terminal Section of the Main Menu, click **Card Sale** or **Check Sale** and complete the required information. Additional information can be entered to make searching the vault easier in the future. Required fields are denoted with an asterisk (\*)

The image shows the 'Billing Information' form. It has several sections and fields. A red box and a red circle with the number 1 highlight the 'Merchant Defined Fields' section, which includes 'Division', 'EnergyForce Customer #', and 'Payment Apply To'. A red box and a red circle with the number 2 highlight the 'Add to Customer Vault' checkbox. A red box and a red circle with the number 3 highlight the 'Send Receipt Email' checkbox. A red box and a red circle with the number 4 highlight the 'Charge' button.

1. **Merchant Defined Fields** – Enter the Division, Energy Force Customer #, and select how to apply the

payment

2. Select the checkbox to **Add to Customer Vault** if the customer would like the payment stored on file for future payments
  - It is recommended that the Customer Vault ID = Energy Force Customer #.
3. Option to *Send Receipt Email* if an email address was entered in the Billing Information.
4. Click **Charge** to submit the payment to the processor.

**Note:** Users have the option to hide fields that display when posting a payment by clicking the Configure button to the top right of the screen. Please see the [Configure Fields for Custom User Experience](#) section.

## Customer Vault Sale

To post a payment from an *existing* payment method on file, click **List Customers** in the Services section.

- Search Customer Vault Records using Customer Vault ID or Energy Force Customer #.
- Click **Submit**.

Home / Customer Vault - List Customers

### Search Customer Vault Records

**Customer Vault ID**  ☐ Include Partial ID Matches

**Last Name**  **Billing ID**  **Shipping ID**

**Account Number**  **Company**

**Start Date**  **End Date**




☐ Only Show Expiring Credit Cards

**Division Number**  **EnergyForce Customer #**  **Payment Apply To**

**NOTE:** Clicking **Submit** with no criteria entered will populate all Customer Vault Records and these can be exported to Excel and sensitive information is protected.

- If searching by Energy Force Customer #, the search will populate any matches in the *Customer List* section; the Customer name can be selected to view the detail in the record.

## Customer List



Customer	Customer Vault ID	Actions	Details	Entry Time
Jane Doe support@energyforce.net	517910	  	Check ...3123	12/22/2022 9:26:07 AM

- If searching by Customer Vault ID, the search will display the saved payment record(s) associated with that vault ID.
- Hovering over the *Billing ID* will show the customer's name and address if it is populated on the payment record.





Home / Customer Vault - List Customers / View Customer

Customer Vault ID : 517910

Delete Customer Vault entry [Show Search Filter](#)




 Credit Card Expires Within 30 Days  Credit Card Expired

**Billing Methods**

Billing ID	Priority	Actions	Details	Created
19	1	  	 *****3123	12/22/2022 9:26:07 AM


[Add Billing Method](#)

**Shipping Address Records**

Shipping ID	Priority	Actions	Details	Created
2076496654	1	  		12/22/2022 9:26:07 AM

[Add Shipping Address](#)

**Merchant Defined Fields**

Division Number  EnergyForce Customer #   Payment Apply To

[Save](#)

- A payment can be made from the Customer Vault record by clicking the **Check** or **Credit Card** icons









Home / Customer Vault - List Customers / View Customer

Customer Vault ID : 517910

[Delete Customer Vault entry](#) [Show Search Filter](#)

**⚠ Credit Card Expires Within 30 Days** **⚠ Credit Card Expired**

### Billing Method Records

Billing ID	Priority	Actions	Details	Created
<a href="#">192922797</a>	1	  	 *****3123	12/22/2022 9:26:07 AM
<a href="#">313744578</a>	2	  	 VISA 411111*****1111	1/23/2023 2:04:54 PM


[Sale](#)


[Add Billing Method](#)


- Enter the amount of the payment, complete the Merchant Defined Fields, and click **Charge**.


### Billing Information


Level III Templates


Credit Card Number  411111\*\*\*\*\*1111


Expiration Date  1025

CVV/CID 


Surcharge Type  No Surcharge


Currency  USD

First Name  Jane


Last Name  Doe


Company


Country  United States

Address  123 Main Street


Address (cont.)

City  Avon

State/Province  Indiana

Zip Code  46123


Phone Number


Email Address  support@energyforce.ne


☐ Send Receipt Email

### Merchant Defined Fields

Division Number

EnergyForce Customer #  517910

Payment Apply To  Balance

Amount  \$ 00.00

[Charge](#)

**Note:** There is an option to *Send Receipt Email* that will email the customer the payment receipt to the email address that is on the customer vault record.

## Configure Fields for Custom User Experience

The gateway offers a customer user experience so hide and/or show fields that display when posting a payment or putting a payment method in the Customer Vault.

- Click the **Configure** button to the top right of the screen when posting a payment in the Virtual Terminal.
- Click the red X by the fields that to be removed from visibility when entering in payment information.
  - This will need done for Credit Card and Electronic Check entries if both services are used.

This screenshot shows the 'Billing Information' section of the Virtual Terminal interface. It includes fields for Credit Card Number, Expiration Date, CVV/CID, Amount, Currency, First Name, Last Name, and Company. To the right, there is a 'Merchant Defined Fields' section with 'EnergyForce Customer #' and 'Payment Apply To'. In the top right corner, there are three buttons: 'Clear', 'Show All', and 'Configure'. An orange arrow points to the 'Configure' button.

This screenshot shows the full Virtual Terminal form, including 'Billing Information', 'Shipping Address', and 'Order Information' sections. Red 'X' icons are placed next to the labels for 'Credit Card Number', 'Expiration Date', 'CVV/CID', 'First Name', 'Last Name', 'Company', 'Country', 'Address', 'Address (cont.)', 'City', 'State/Province', 'Zip Code', 'Email Address', 'Fax Number', and 'Website Address'. Orange arrows point from the 'Configure' button in the top right to the 'Same as Billing' checkbox and the 'First Name' and 'Last Name' fields. The 'Configure' button is also highlighted with an orange border.

- These fields can also be updated in the Customer Vault by clicking **Add Customer** and **Configure**.
  - This will need done for Credit Card and Electronic Check entries if both services are used.