Process a Payment on the Merchant Gateway

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

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
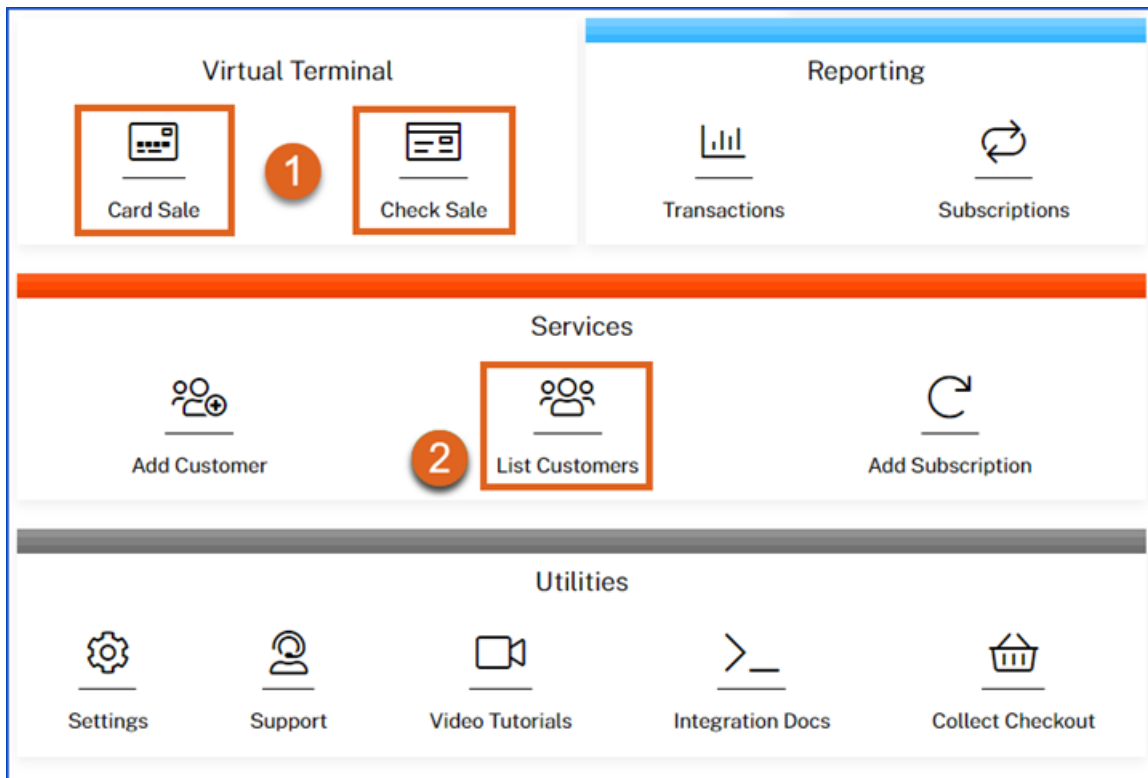
Virtual Terminal Sale

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 **(*)**

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**.

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.

- 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.

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

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

- 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.