

# Process a Payment on the Merchant Gateway

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## Update/Verify Energy Force Prior to Processing Payment

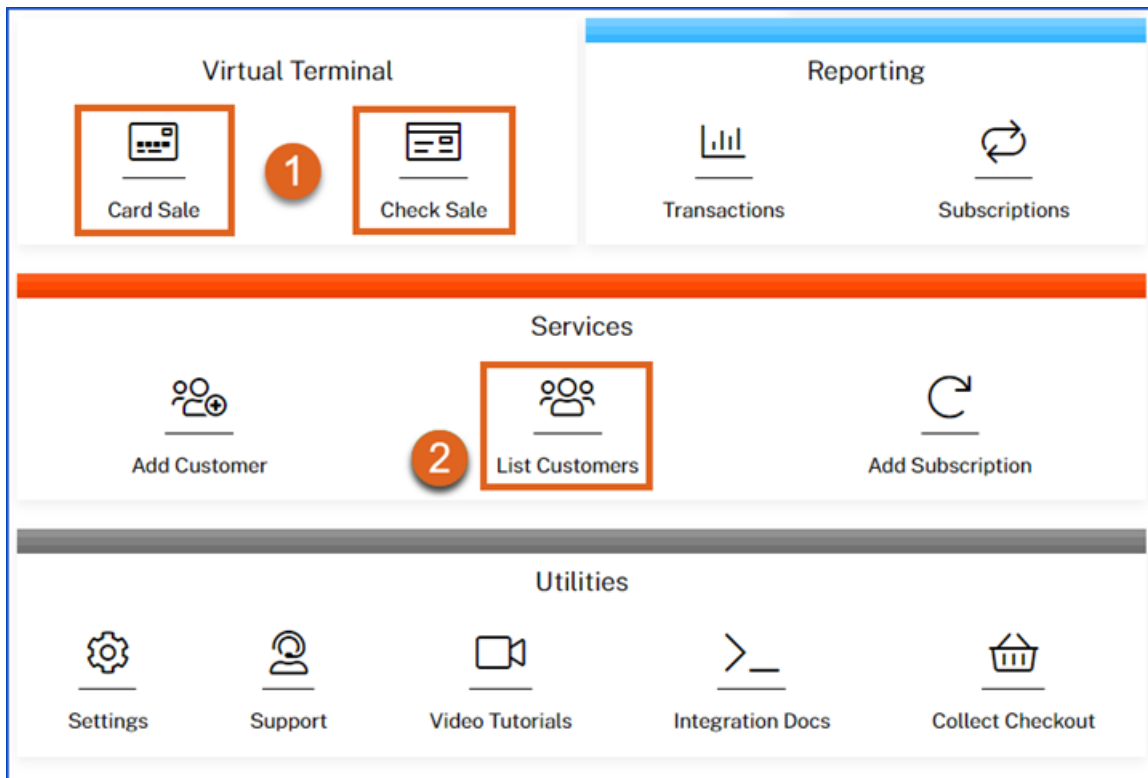
The Customer Vault ID *must* be setup in Energy Force *prior* to processing the sale in the **Automatic Payment Type** menu in Energy Force

The screenshot displays the Energy Force Merchant Gateway interface. On the left, there is a section for 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 a '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). At the bottom of the main window, there are four buttons: 'Automatic Payment Type', 'Tax Exemptions', 'User Defined', and 'Tank Address'. An orange box highlights the 'Automatic Payment Type' button. A dialog box titled 'Automatic Payment Type' is open on the right. It contains a 'Customer Vault ID' field with the value '54683', an 'Automatic Payment Type' dropdown menu, 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 box, there 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 window to the 'Customer Vault ID' field in the dialog box.

**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 screenshot shows the 'Billing Information' form with the following fields and callouts:

- 1 Merchant Defined Fields:** A section containing 'Division', 'EnergyForce Customer #', and 'Payment Apply To' (set to 'Balance').
- 2 Add to Customer Vault:** A checkbox option.
- 3 Send Receipt Email:** A checkbox option.
- 4 Charge:** A green button at the bottom of the form.

Other visible fields include: Credit Card Number \*, Expiration Date \*, CVV/CID, Amount \*, Currency (USD), First Name, Last Name, Company, Country, Address, Address (cont.), City, State/Province, Zip Code, Phone Number, Fax Number, Email Address, and Website Address.

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

Include Partial ID Matches

Last Name  Billing ID  Shipping ID

Account Number  Company

Start Date   End Date




Only Show Expiring Credit Cards

Division Number   Payment Apply To

⚠ Credit Card Expires Within 30 Days ⛔ Credit Card Expired

**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	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**

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
192922797	1		*****3123	12/22/2022 9:26:07 AM
313744578	2	 <span style="border: 1px solid gray; padding: 1px;">Sale</span>	<b>VISA</b> 411111*****1111	1/23/2023 2:04:54 PM

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 ✔  Expiration Date ✔  CVV/CID !

Surcharge Type ✔ Amount \*

Currency ✔

First Name ✔  Last Name ✔  Company

Country ✔

Address ✔  Address (cont.)  City ✔

State/Province  Zip Code ✔  Phone Number

Email Address ✔   
 Send Receipt Email

#### Merchant Defined Fields

Division Number  EnergyForce Customer # ✔  Payment Apply To

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.