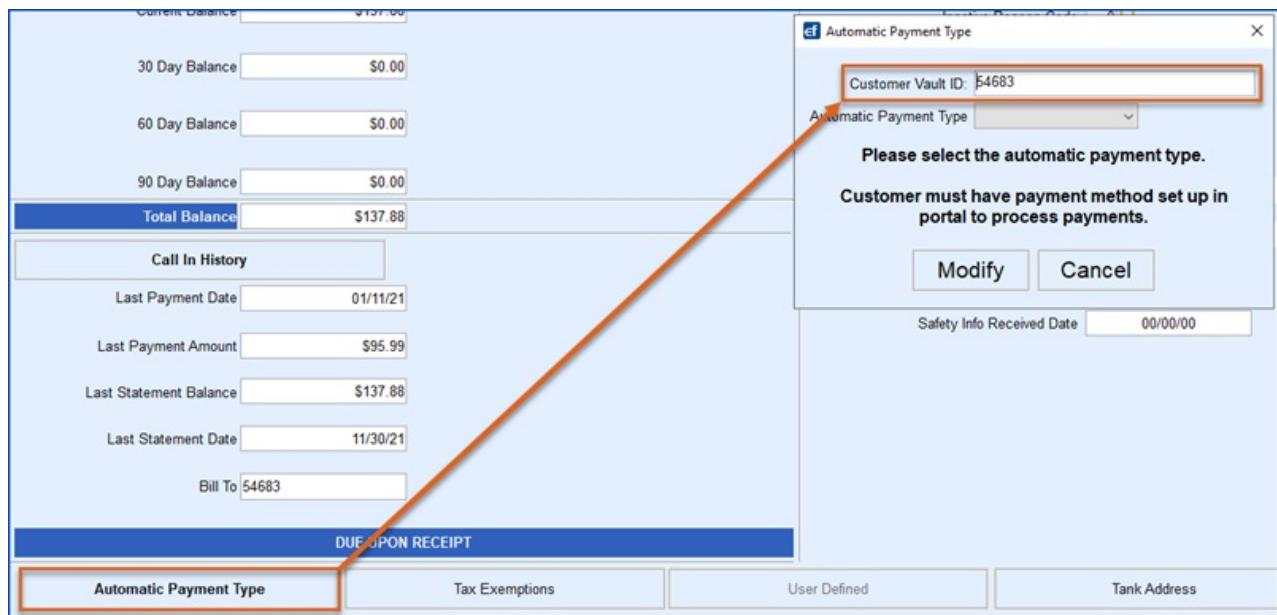


Process a Payment on the Merchant Gateway

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

Update/Verify Energy Force Prior to Processing Payment

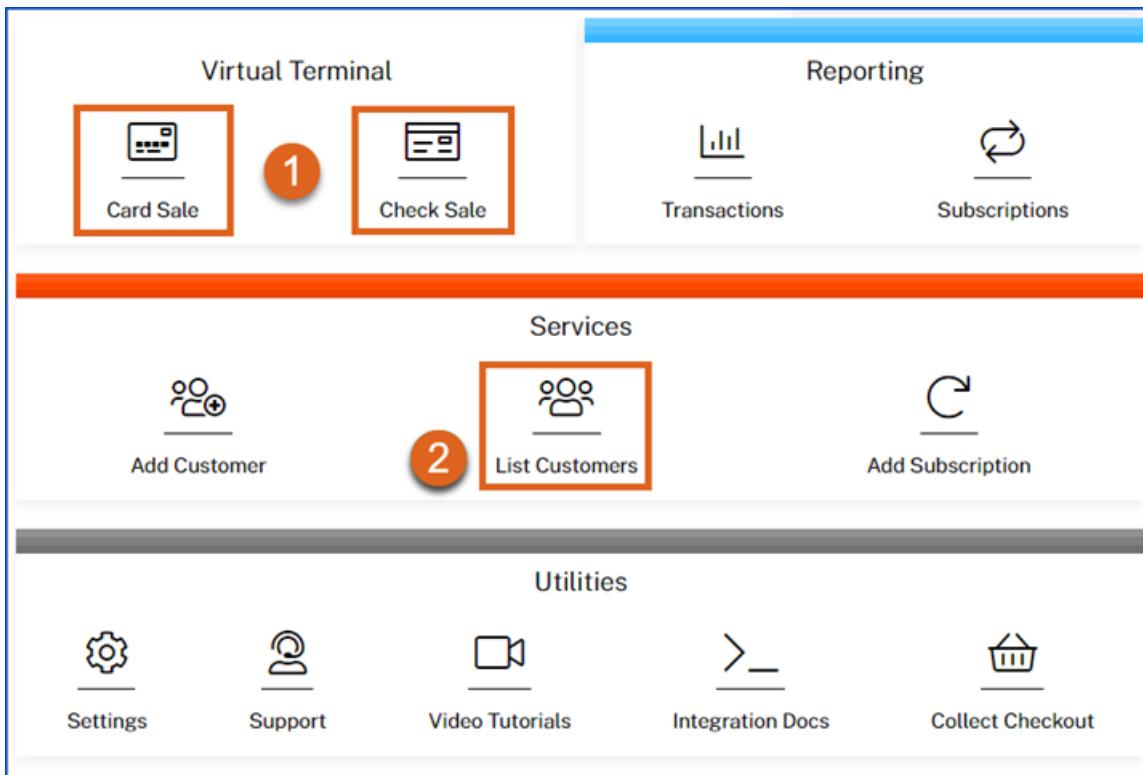
The Customer Vault ID *must* be setup in Energy Force *prior* to processing the sale in the **Automatic Payment Type** menu in Energy Force



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 a screenshot of the "Billing Information" screen for a Virtual Terminal Sale. The screen is divided into several sections:

- Billing Information:** Includes fields for "Credit Card Number" (required), "Expiration Date" (required), "CVV/CID", "Amount" (required), "Currency" (USD), "First Name", "Last Name", "Company", "Country" (dropdown), "Address", "Address (cont.)", "City", "State/Province", "Zip Code", "Phone Number", "Fax Number", "Email Address", and "Website Address".
- Merchant Defined Fields:** Includes fields for "Division", "EnergyForce Customer #", "Payment Apply To" (checkbox checked), and "Balance".
- Customer Vault:** Includes a checkbox for "Add to Customer Vault" (numbered 2).
- Other Options:** Includes checkboxes for "Disable Duplicate Check" and "Send Receipt Email" (numbered 3).
- Action Buttons:** Includes a green "Charge" button (numbered 4) and a "Cancel" 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 01/01/2002 End Date 01/23/2023

Only Show Expiring Credit Cards

Division Number EnergyForce Customer # Payment Apply To

Submit

⚠ 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 List

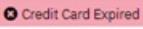
Customer	Customer Vault ID	Actions	Details	Entry Time
Jane Doe support@energyforce.net	517910	  	Check ...3123	12/22/2022 9:26:07 AM

- 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

Billing Method Records

Billing ID	Priority	Actions	Details	Created
19...3123	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
<input type="text"/>	517910	<input type="text" value="Balance"/>

Save

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

Billing Method Records

Billing ID	Priority	Actions	Details	Created
192922797	1			*****3123 12/22/2022 9:26:07 AM
313744578	2			VISA 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

Merchant Defined Fields

Division Number	EnergyForce Customer #	Payment Apply To
	517910	Balance

Billing Information Fields:

- Credit Card Number: 411111*****1111
- Expiration Date: 1025
- CVV/CID: (empty)
- Surcharge Type: No Surcharge
- Amount: \$ 00.00 (highlighted)
- Currency: USD
- First Name: Jane
- Last Name: Doe
- Company: (empty)
- Country: United States
- Address: 123 Main Street
- Address (cont.): (empty)
- City: Avon
- State/Province: Indiana
- Zip Code: 46123
- Phone Number: (empty)
- Email Address: support@energyforce.net
- Send Receipt Email (highlighted)

Merchant Defined Fields Fields:

- Division Number: (empty)
- EnergyForce Customer #: 517910
- Payment Apply To: Balance

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.

Billing Information

Merchant Defined Fields

Configure

Shipping Address

Order Information

Billing Information

Shipping Address

Order Information

- 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.