Save and Search in Customer Vault
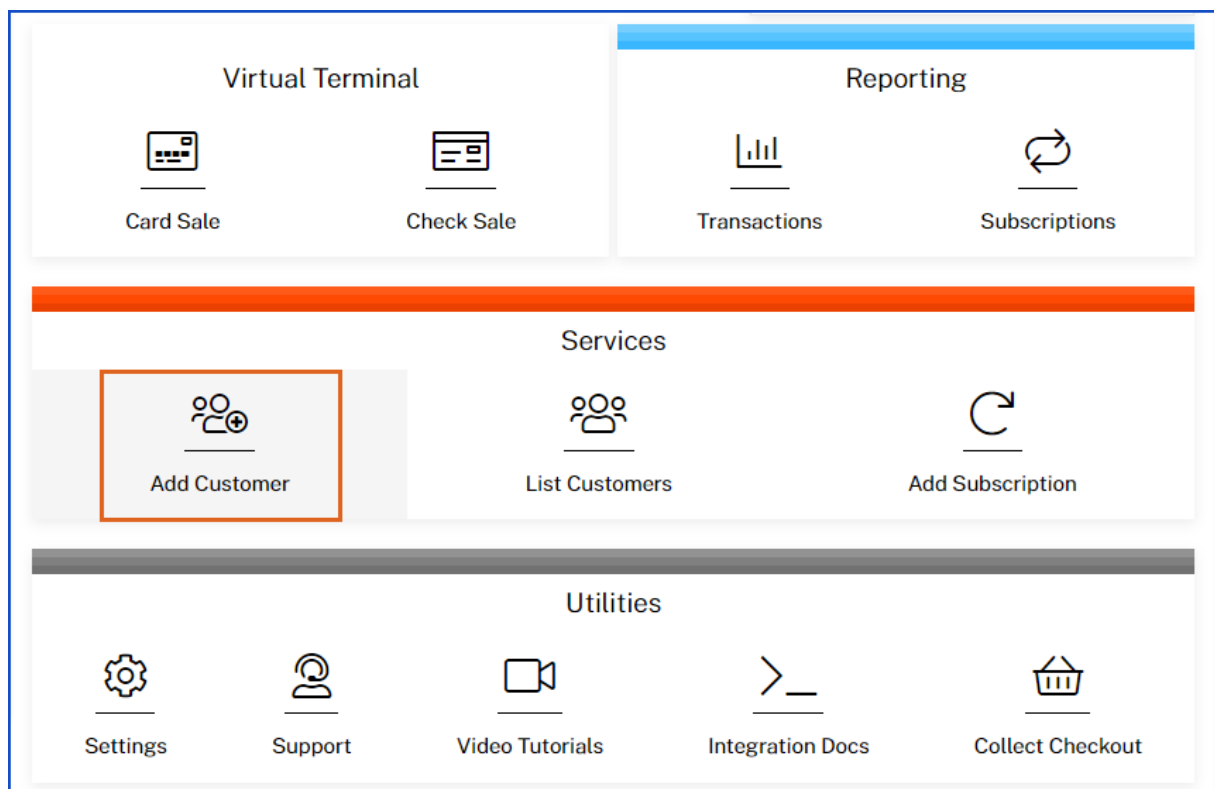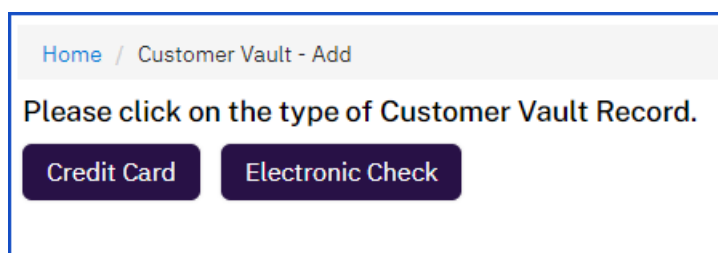
Save a Payment Method in Customer Vault

Payment methods can be stored in a secured Customer Vault in the Merchant Gateway to allow for future card processing and automatic payments from Energy Force.

Add Customer Payment Method to the Customer Vault

1. Click **Add Customer** in the Services section of the Main Menu

2. Select Credit Card or Electronic Check (this only applies if both services are used)

3. Complete the information required to store the payment method on file
    - Credit Card

1. Customer Vault ID = Energy Force Customer #
2. Complete Merchant Defined Fields (most payments will be set with Payment Apply To as Balance)
3. Credit Card Number, Expiration Date, and Energy Force Customer # are required fields
4. Phone Number and Email address are optional, but more information is encouraged
5. Click Submit to store the payment method on file for the customer

- Electronic Check

1. Customer Vault ID = Energy Force Customer #
2. Complete Merchant Defined Fields (most payments will be set with Payment Apply To as Balance)
3. Name on Account, Routing Number, Bank Account Number, and Energy Force Customer # are required fields
4. Phone Number and Email address are optional, but encouraged
5. Click Submit to store the payment method on file for the customer

Note: NMI Gateway fields for Division, Energy Force Customer #, and Payment Apply To are updated when a Customer Vault record is created from the Consumer Portal.

Searching the Customer Vault for Records

1. Click on **List Customers** in the Services section of the Main Menu
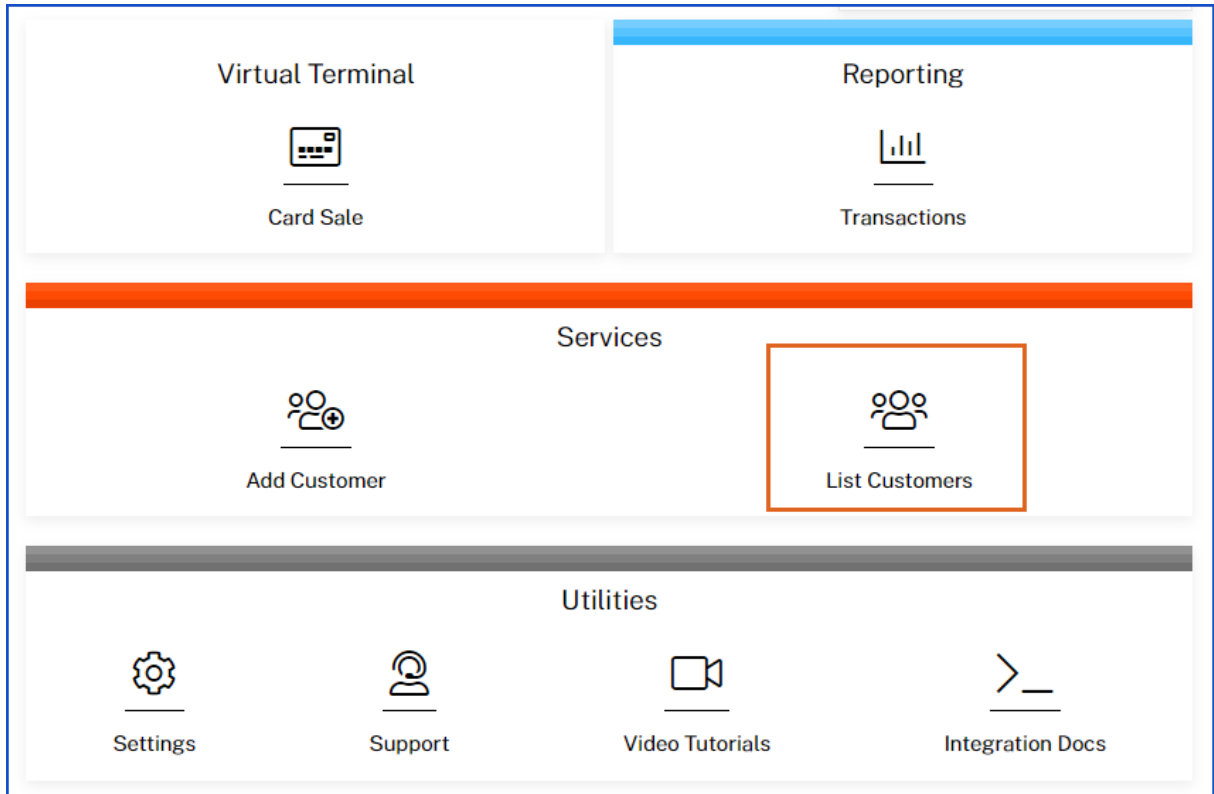
2. There are multiple ways to search for a stored payment method in the Customer Vault

- Enter desired search criteria:
    1. Customer Vault ID (in most cases this will = the Energy Force customer #)
    2. Last Name
    3. Last 4 of account or credit card #
    4. Company Name (if the record was created and saved with that information)
    5. Division Number
    6. Energy Force Customer #
    7. Payment Apply To: Balance, Budget, or Contract
- Click Submit and results will display in **Customer List**