# Add Another Billing Method To Customer Vault

1. When logged into the Merchant Gateway, click **List Customers.**
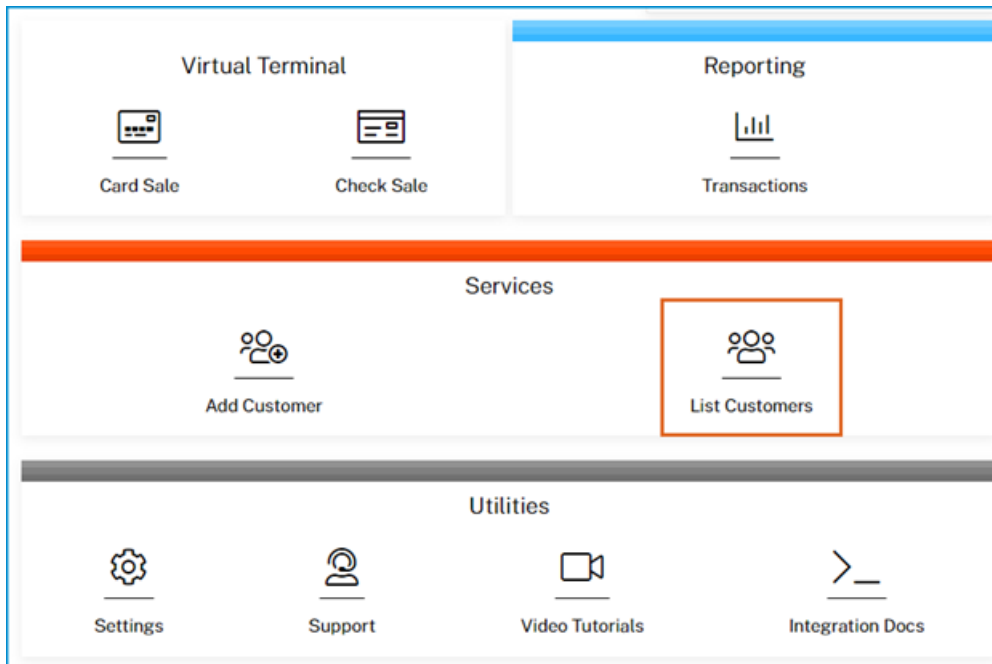


2. Search for the customer vault record to whom a billing method should be added.

   **Note**: Using the Energy Force Customer # is recommended.

## 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**

04/03/2023 📅    📅 ▼

☐ Only Show Expiring Credit Cards

| Location | Division | **EnergyForce Customer #** |
|---|---|---|
| | | 1634499 |

**Payment Apply To**

Submit

⚠ Credit Card Expires Within 30 Days    ⊗ Credit Card Expired

3. If a record exists in the Customer Vault, it will populate in the Customer List, click on the *Customer's Name* to access the vault record.

## Customer List

| Customer | Customer Vault ID | Actions | Details | Entry Time |
|---|---|---|---|---|
| Brandy Williams<br>bwilliams+72@energyforce.net | 1634499 | 💳 💳 ↻ 📄 | Credit Card<br>4...1111 | 3/31/2023<br>9:59:14 AM |

4. Once in the vault record, make sure that the required fields *Energy Force Customer #* and *Payment Apply To* are populated with information.

## Billing Method Records

| Billing ID | Priority | Actions | Details | Created |
|---|---|---|---|---|
| BrandyTesting | 1 | | VISA 411111******1111 | 3/31/2023 9:59:14 AM |

**Add Billing Method**

## Shipping Address Records

| Shipping ID | Priority | Actions | Details | Created |
|---|---|---|---|---|
| 1453652934 | 1 | | | 3/31/2023 9:59:14 AM |

**Add Shipping Address**

## Merchant Defined Fields

**Location**

**Division** ✓
1

**EnergyForce Customer #** ✓
1634499

**Payment Apply To**
Balance

**Save**

5. Select **Add Billing Method.**

6. If Merchant has both **Credit Card** and **Electronic Check** processing, select the method that will be added.



7. Enter the required information and click **Submit.**

## Customer Vault Record

**Customer Vault ID** ✅

> 1634499

## Billing Information

**Billing ID** ℹ️ ✅

> Brandy's Test Checking

| **Name on Account** ✅ | **Routing / ABA Number** ℹ️ ✅ |
|---|---|
| Brandy L Williams | 123123123 |

| **Account Number** ℹ️ ✅ | **Acct Holder Type** ✅ | **Account Type** ✅ |
|---|---|---|
| 123123123 | Personal ▾ | Checking ▾ |

| **Entry Method (SEC code)** | **First Name** |
|---|---|
| Telephone Initiated Entry (TEL) ▾ | |

| **Last Name** | **Company** |
|---|---|
| | |

| **Country** ✅ | **Address** |
|---|---|
| United States ▾ | |

| **Address (cont.)** | **City** | **State/Province** | **Zip Code** |
|---|---|---|---|
| | | - Select State - ▾ | |

| **Phone Number** | **Fax Number** | **Email Address** |
|---|---|---|
| | | |

**Priority** ✅

> ▾

**Submit**

8. Optionally **Go back to Customer Vault Record** for that updated customer or **Go back to Customer Vault List.**

Home / Customer Vault - Add / Check / Success

**Billing Record has been added to the Customer Vault.**

Go back to Customer Vault Record
Go back to Customer Vault list

**Note**: The lowest *Priority* number is the method that will be charged when posting an automatic payment from Energy Force.