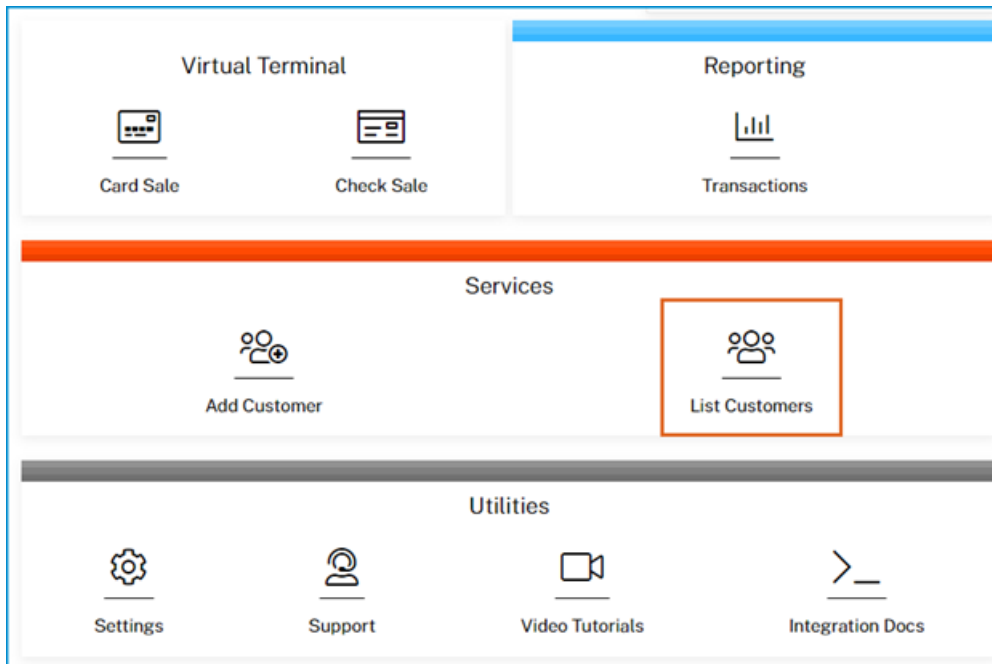


Add Another Billing Method To Customer Vault

Last Modified on 10/31/2023 5:14 pm EDT

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 End Date




Only Show Expiring Credit Cards

Location Division EnergyForce Customer #

Payment Apply To

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 bwilliams+72@energyforce.net	1634499	  	Credit Card 4...1111	3/31/2023 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	EnergyForce Customer #
<input type="text"/>	1	1634499
Payment Apply To		
Balance		

Save

5. Select Add Billing Method.

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 EnergyForce Customer #

1 1634499

Payment Apply To

Balance

Save

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

Home / Customer Vault - Add

Please click on the type of Customer Vault Record.

7. Enter the required information and click Submit.

Customer Vault Record

Customer Vault ID ✓

Billing Information

Billing ID ⓘ ✓

Name on Account ✓ **Routing / ABA Number** ⓘ ✓

Account Number ⓘ ✓ **Acct Holder Type** ✓ **Account Type** ✓

Entry Method (SEC code) **First Name**

Last Name **Company**

Country ✓ **Address**

Address (cont.) **City** **State/Province** **Zip Code**

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.

Billing Method Records



Billing ID	Priority	Actions	Details	Created
BrandyTesting	1	   	 411111*****1111	3/31/2023 9:59:14 AM
Brandy's Test Checking	2	  	 *****3123	4/3/2023 12:24:04 PM

Add Billing Method