

# Payment Integration Payments in Energy Force

Last Modified on 12/13/2024 9:49 am EST

## Initiating an Integrated Payment

Payments can be made in two locations within Energy Force.

**Note:** Private user permission is required.

## Payment from Posting Menu

Navigate to *Main Menu / Posting Menu / Make Portal Payment*. Select the *Division* and *Customer Number* for the remaining fields to populate.

**Customer**  
Division:  Customer Number:  Customer Name:

**Payment Apply To**  
 Balance  Contract

**Payment Method**  
Method Type:    
Saved Method:    
Device:

**Payment**  
Total Balance: \$0.00  
Posting Division:    
Payment:   
Fee: \$0.00  
Discount: \$0.00  
Total Payment: \$0.00

**Budget**  
No Active Budget

**Contract**

Contract Number	Amount Contracted	Payments Made	Begin Date	End Date
	\$0.00	\$0.00	00/00/00	00/00/00

## Payment from Customer Maintenance Screen

Navigate to *Main Menu / Customer Menu / Customer Maintenance*. Selecting the **Pay** button to the right of the *Last Payment Date* at *Customer Maintenance*, the customers information will populate in the *Payment Transaction* screen.

90 Day Balance	\$19,340.37
<b>Total Balance</b>	<b>\$19,546.29</b>
<b>Call In History</b>	
Last Payment Date	09/05/24 <b>Pay</b>
Last Payment Amount	\$300.00

## Payment Transaction Window

1. On the *Payment Transaction* window select the appropriate *Payment Apply To* option to apply the payment to.

**Note:** Budget and Contract sections are for informational purposes.

The screenshot shows the 'Payment Transaction' window with the following fields and sections:

- Customer:** Division: 1, Customer Number: 100007, Customer Name: ADAMS, ANSEL
- Payment Apply To:** Radio buttons for Balance, Budget (selected), and Contract. Callout 1 points to the Budget button.
- Payment Method:** Method Type: Use Saved Payment Method (callout 2), Saved Method: new visa - Visa - x1111 (callout 3), Device: [empty]
- Payment:** Total Balance: \$19,546.29, Posting Division: 1, ABC PROPANE COMPANY. Fields for Payment (\$120.00, callout 4), Fee (\$0.00, callout 5), Discount (\$0.00, callout 6), and Total Payment (\$120.00, callout 7).
- Budget:** Payment: 120.00, Times Billed: 12, Number of Payments: 12, Beginning Period/Year: 4 2020, Ending Period/Year: 4 2021.
- Contract Table:**

Contract Number	Amount Contracted	Payments Made	Begin Date	End Date
552	\$2,000.00	\$0.00	09/23/24	12/31/24
123	\$247.50	\$550.00	06/06/24	12/30/24
550	\$3,469.00	\$300.00	06/01/24	05/31/25
548	\$1,579.00	\$0.00	11/01/22	12/31/23
543	\$1,750.00	\$0.00	09/01/21	05/31/22
542	\$0.00	\$0.00	09/01/20	09/01/21
- Bottom:** Callout 8 points to 'Confirm Information' checkbox, callout 9 points to 'Submit' button.

- a. **Budget Payment** – If the customer has an active budget then *Budget* will be preselected, and the Budget Payment amount will be in the *Payment* field. The transaction will update the *Number of Payments* for the customer’s budget.

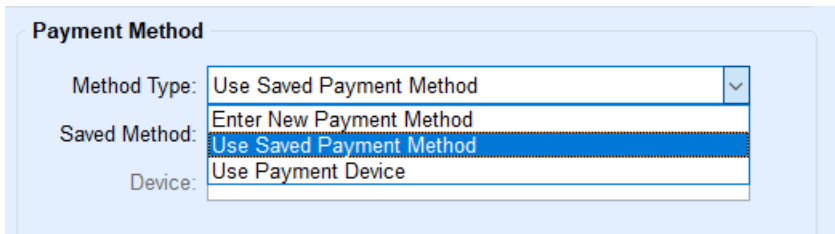
**Payment Apply To**

Balance  Budget  Contract

- b. **Balance Payment** – Total balance on account will populate as the *Payment* amount.
- c. **Contract Payment** – No amount auto populates; transaction will update an existing active contract for *Payments Made*.

2. Choose the *Method Type* in the *Payment Method* area. If the customer has a saved payment method, *Use Saved*

*Payment Method* displays in the *Method Type* field. Additional options include *Enter a New Payment Method* or *Use Payment Device* by selecting the drop-down arrow.



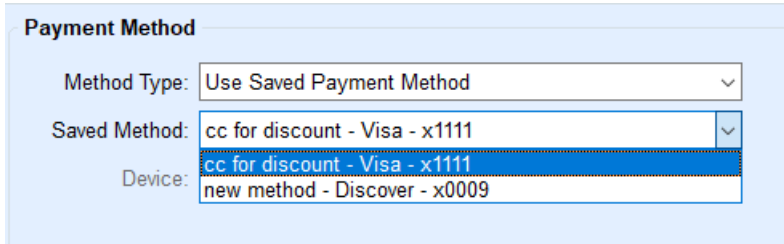
**Payment Method**

Method Type: Use Saved Payment Method

Saved Method: Enter New Payment Method  
Use Saved Payment Method  
Use Payment Device

Device:

3. The *Saved Method* field displays the default saved payment method when using *Use Saved Payment Method*. Other Saved Payment Methods can be selected using the drop-down arrow.



**Payment Method**

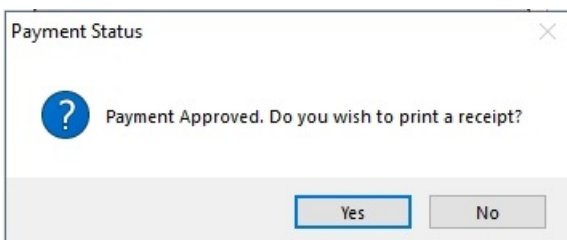
Method Type: Use Saved Payment Method

Saved Method: cc for discount - Visa - x1111  
new method - Discover - x0009

Device:

4. *Payment* section is populated based on *Payment Apply To* selection. For non-budget customers, the balance will populate into the *Payment* field and for budget customers the budget payment amount will populate. The *Payment* field amount can be changed, however, it might affect the *Discount* being applicable.
5. A fee amount, if any, is shown on the *Fee* line. Fees will update based on the EF Portal XRef Setup relationship for Department, Payment Type, Payment Apply To, and Fee Amount/Department.
6. A discount amount, if any, is displayed on the *Discount* line.
7. The *Total Payment* amount = *Payment* + *Fee* – *Discount*. This is the amount that will be processed.
8. Check the *Confirm Information* box.
9. Select **Submit**.

Once customer completes the transaction, Energy Force will display a *Payment Status* message based on the processing results and prompt to print a receipt for the customer.



Payment Status

Payment Approved. Do you wish to print a receipt?

Yes No

Selecting **No** will return to the *Payment Transaction* window. Selecting **Yes** allows for printing the receipt for the customer.

**ABC PROPANE COMPANY**

5250 US HWY 36  
SUITE 100  
AVON, IN 46123  
(317)745-6560

ADAMS,ANSEL  
345 PRODUCTION DRIVE  
BROWNSBURG, IN, 46112

**Receipt# 1221**  
Customer Number 100007  
PaymentType (Visa - 1111)

Description	Amount
Amount Due	120.00
Included Fees	0.00
Payment Received	120.00
Discount Applied	0.00
<b>Total Credit To Account</b>	<b>(120.00)</b>

**Transaction Details**

Date/Time 08/05/2024 2:08:38 PM CST  
Transaction ID 9794473094  
Transaction Type Card  
Response SUCCESS  
Entry Method Keyed  
Authorization Code 123456  
Processor Id CCPROCESSORA  
Application Id  
Application Label  
Verification Type

## Payment Using Saved Card or ACH Method

### Saving a Payment Method

Payment Methods can be saved when processing a payment or set up ahead of time.

Note: The following steps are specific to adding a new payment method without processing a payment.

The **Payment Methods** button is located below the **Meter/RTM** button on the *Customer Maintenance* screen.

Efficiency
Payment Arrangement
Tickler Information
Meter/RTM Information
<b>Payment Methods</b>

To see other saved methods select the drop-down for Saved Methods. Choose **Add** to enter a new payment method.

ef Payment Method Management

Division: 1

Customer Number: 14238

Vault ID: 14238

Saved Methods:

cc for discount - Visa - x1111

**Add** Delete

Cancel

The *Billing Address* populates from the customer's record. Update the address to match the Billing Address of the payment being entered.

ef Enter New Payment Method

Address 1: 101 MAIN ST

Address 2:

City: 1000 PALMS

State: CA Zip: 92276-

1 Payment Type: Credit Card

Save Payment Method

2 Payment Nickname: my new cc

3  Set as default

4  Confirm information and proceed to payment method entry

5 Credit Card

MM / YY Security Code

6 **Submit**

Cancel

1. Select *Payment Type* dropdown to choose the appropriate payment type, *Credit Card* or *ACH*.
2. This payment type can be saved for future use by checking the *Save Payment Method* box and entering a *Payment Nickname* for this method.

3. Optionally check the *Set as default* box.
4. Check the box next to *Confirm information and proceed to payment method entry* to display the fields for *Credit Card* or *ACH*.

**Note:** There is a short delay before the fields appear.

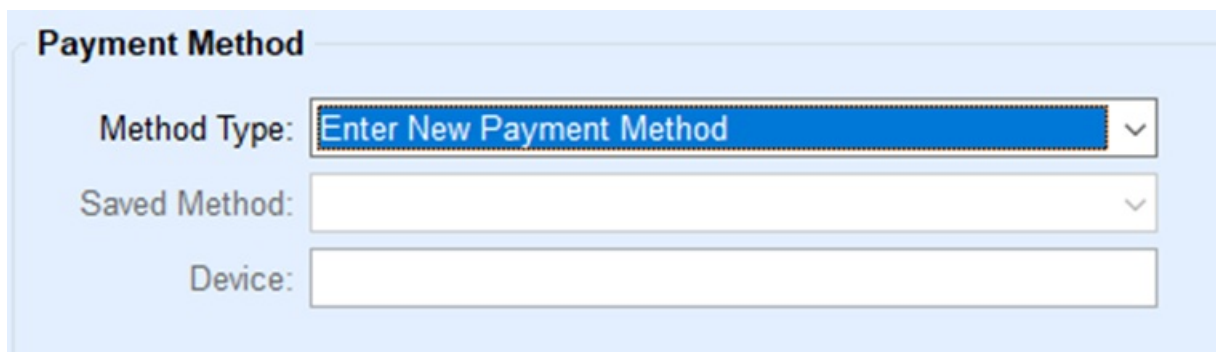
5. Enter the Credit Card or ACH information in the fields.
6. Select **Submit**.

When the submission is complete, a confirmation message displays stating the payment method was added successfully.

Payment Methods can also be removed by selecting the **Delete** button. The Delete functionality is only available when there is more than one saved Payment Method.

## Add a Payment Method and Process a Payment

To add a new Payment Method and process a payment at the same time, select **Pay** on the *Customer Maintenance* screen or **Make Portal Payment** on the *Posting Menu*. Then from the *Payment Transaction* window select *Enter New Payment Method* and the **Next** button.



The screenshot shows a light blue form titled "Payment Method". It contains three input fields:

- Method Type:** A dropdown menu with a blue background and white text, currently displaying "Enter New Payment Method".
- Saved Method:** A dropdown menu with a white background and a downward arrow on the right.
- Device:** A text input field with a white background.

1. Select the *Payment Type* – *Credit Card* or *ACH*.
2. Check the *Save Payment Method* box.
3. Enter a *Payment Nickname*.
  - a. When saving a new payment method from within Energy Force if | (pipe) special character is used it will be replaced it with a - (hyphen) upon saving.  
**Example:** My|New|Card would save to NMI as My-New-Card.
4. Check the *Set as default* box if this method is going to be the customer default payment method.
5. Check the box to *Confirm information and proceed to payment method entry*. Once checked, the fields for *Credit Card* or *ACH* information will display.
6. Enter the *Credit Card* or *ACH* information in the fields.
7. Select **Submit**. The payment method will be saved, and the payment will be processed.

The choice to print a receipt will come up after the payment is approved

**Note:** Creating a saved payment method within Energy Force will auto-create the NMI vault record and account association for accounts that do not already have a vault record. This allows users to save the initial payment method without going to NMI first.

## Device Payments

### Processing a Device Payment

Device payments can be made from the **Pay** button on the Customer's Account or from the **Make Portal Payment**

on the *Posting Menu*.

Contract Number	Amount Contracted	Payments Made	Begin Date	End Date
	\$0.00	\$0.00	00/00/00	00/00/00

1. Select *Balance*, *Budget* or *Contract* in the *Payment Apply To* section. If the customer has a Budget, it will be preselected, and the Budget amount will be populated into the *Payment* field.
2. Select *Use Payment Device* for *Method Type*.
3. Select the *Device*.

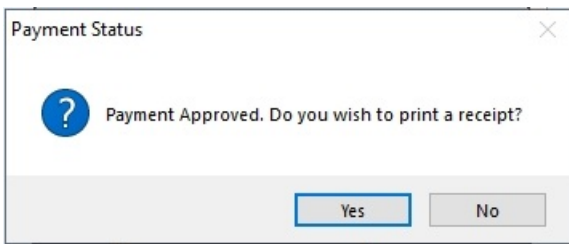
**Note:** If there is a default Device set for the user processing the payment it will display automatically and can be changed if necessary. When there is no default Device set, a Device can be selected from the *Select - Payment Device* window. When selecting the Device from the list optionally check *Set selected as default device* and choose **Select**.

Payment Device
306TESTING
TESTING

4. Check the box to *Confirm Information*.
5. Choose **Submit** to send payment to the device.

Complete the transaction on the device. Once complete, a payment status box will display in Energy Force. If the status is approved there is an option to print a receipt.





Device payments will post to a payment journal with the Division\Location set in *Payment Device Management*.

## Cancel Payment on Device

1. If incorrect payment amount is sent to the device, press the red X (cancel) button on the device. After Energy Force receives the cancellation request, the correct amount can be resent to the device following the directions above.



## Voiding NMI Transactions

**Note:** Only Available in version 17.284 or after.

NMI Credit Card and ACH payments voided in Energy Force now communicates back to NMI.

- If the original payment is still pending (not settled) the transaction will be voided in NMI or if the payment was already settled then a refund will be issued.
- When the payment is voided in Energy Force, the user receives a message stating *Successfully Processed Void in Merchant Portal*. If the void couldn't reach NMI the user will be notified to log into NMI. The void is also reflected on the Gateway Payment Reconciliation report located on the *Posting Menu* by displaying the *Total Paid* as 0 and the *Status* as Voided.

Gateway Payment Reconciliation																			
Start Division: 1																			
End Division: 9999																			
Start Payment Date: 09/01/2024																			
End Payment Date: 10/07/2024																			
Division	Posting Division	Customer Number	Date Of Payment	Payment Amount	Fee 1	Total Paid	Discount Amount	Status	Payment Trancaction ID	Payment Apply To	Payment Type	Channel	Payment Journal	Fee Journal	Payment Ticket Number	Fee Ticket Number	Processed Date	Processed Time	Entered By
1	1	14238	09/24/2024	209.9	4.4	214.3	10	APPROVED	9966277786	Balance	C	Energy Force	102809	102808	417858	417857	09/24/2024	22:39:16	Jennifer
1	1	14239	09/25/2024	125	0	125	0	APPROVED	9967266503	Budget	A	Energy Force	102812		417859		09/25/2024	9:08:20	Jennifer
1	1	14239	09/25/2024	125	2	127	0	APPROVED	9967522768	Budget	C	Device	102812	102813	417861	417860	09/25/2024	10:26:57	Jennifer
1	1	14232	09/25/2024	200	3	203	0	APPROVED	9967570952	Contract	C	Energy Force	102812	102813	417864	417863	09/25/2024	10:41:01	Jennifer
1	1	14235	09/27/2024	5	3	8	0	APPROVED	9974870085	Balance	A	Energy Force	102818	102817	417871	417870	09/27/2024	13:17:12	Jennifer
1	1	14235	09/27/2024	20	3	0	0	VOIDED	9974979174	Balance	A	Energy Force	102818	102817	417873	417872	09/27/2024	13:47:23	Jennifer
1	1	14238	09/27/2024	35	0.7	0	0	VOIDED	9974982866	Balance	C	Device	102818	102817	417875	417874	09/27/2024	13:48:28	Jennifer
1	1	14238	09/30/2024	209.9	4.4	0	10	VOIDED	9982523053	Balance	C	Energy Force	102822	102821	417877	417876	09/30/2024	8:57:47	Jennifer
1	1	14238	09/30/2024	200	2	0	0	VOIDED	9982545269	Budget	C	Energy Force	102822	102821	417879	417878	09/30/2024	9:04:39	Jennifer
1	1	14232	09/30/2024	125	2	127	0	APPROVED	9982582971	Budget	C	Energy Force	102822	102821	417881	417880	09/30/2024	9:15:53	Jennifer
1	0	10111	10/03/2024	200	3.95	203.95	0	APPROVED	9997294295	Balance	C	Consumer Portal	102841	102840	417906	417905	10/04/2024	14:03:19	
1	0	10111	10/03/2024	197.64	3.95	201.59	2.36	APPROVED	9997334223	Balance	C	Consumer Portal	102841	102840	417902	417901	10/04/2024	14:03:18	

- When voiding a Payment Integration payment in Energy Force, all applicable fees and discounts will also be voided. When the Void Line item is selected, a message alerts that the payment, applicable fees, and discounts will all be voided. Choose **Cancel** to return to the list or **OK** to process the void.

**Note:** This new functionality will only work on payments processed after this release.