

Payment Integration Payments in Energy Force

Last Modified on 02/25/2025 1:55 pm 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
Total Balance	\$19,546.29
Call In History	
Last Payment Date	09/05/24 Pay
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.

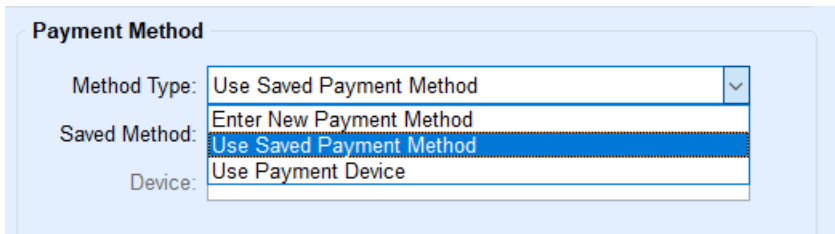
Payment Apply To

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.

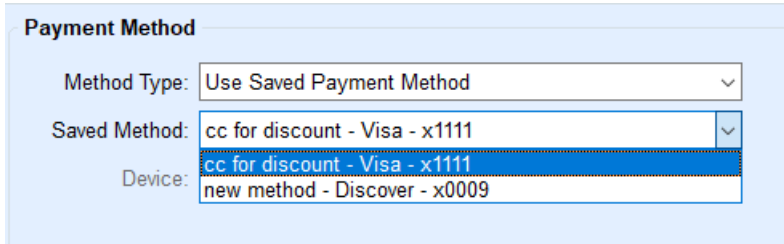
2. Choose the *Method Type* in the *Payment Method* area. If the customer has a saved payment method, *Use Saved*

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.



The screenshot shows a form titled "Payment Method" with three fields: "Method Type", "Saved Method", and "Device". Each field has a dropdown arrow on the right. The "Method Type" dropdown is set to "Use Saved Payment Method". The "Saved Method" dropdown is set to "Enter New Payment Method". The "Device" dropdown is set to "Use Payment Device".

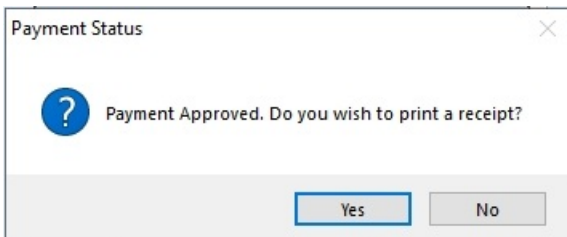
3. The *Saved Method* field displays the default saved payment method when using *Use Saved Payment Method*. Other Saved Payment Methods can be selected using the drop-down arrow.



The screenshot shows the same "Payment Method" form. The "Method Type" dropdown is still "Use Saved Payment Method". The "Saved Method" dropdown is now set to "cc for discount - Visa - x1111". The "Device" dropdown is also set to "cc for discount - Visa - x1111".

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.



The screenshot shows a dialog box titled "Payment Status" with a close button (X) in the top right corner. On the left is a blue circle with a white question mark. To the right of the question mark is the text "Payment Approved. Do you wish to print a receipt?". At the bottom of the dialog box are two buttons: "Yes" and "No".

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

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
Total Credit To Account	(120.00)

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
Payment Methods

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.

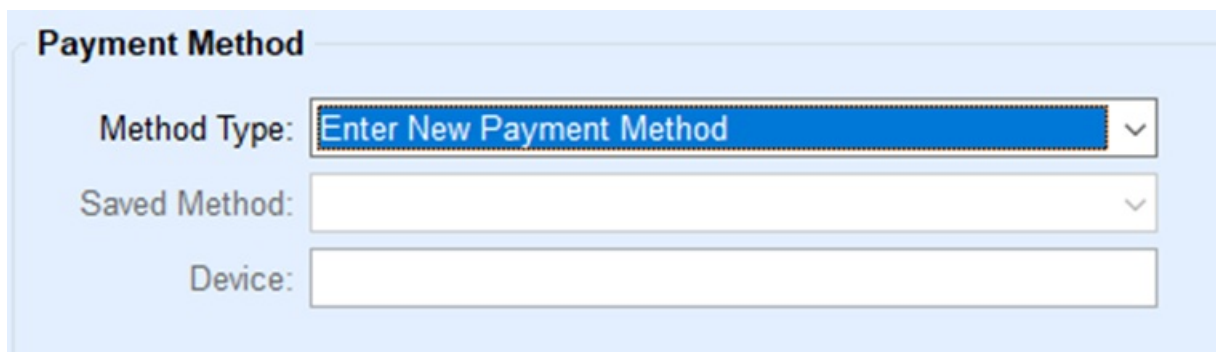
5. Enter the Credit Card or ACH information in the fields.
6. Select **Submit**.

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 and a thin border.

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*.

Customer
Division: 1 Customer Number: 14239 Customer Name: TEST,TESS

Payment Apply To
1 Balance Budget Contract

Payment Method
2 Method Type: Use Payment Device
Saved Method:
3 Device: TESTING
 Save Method Nickname: Default

Payment
Total Balance: (125.00)
Posting Division: 1 TEST DIVISION
Payment: \$125.00
Fee: \$2.00
Discount: \$0.00
Total Payment: \$127.00

Budget
Payment: 125.00
Times Billed: 0
Number of Payments: 1
Beginning Period/Year: 9 2024
Ending Period/Year: 7 2025

Contract

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

4 Confirm Information 5 **Submit**

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**.

Select - Payment Device

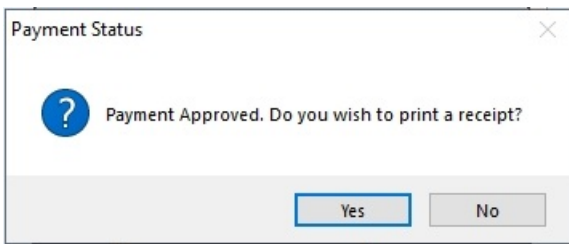
Payment Device
306TESTING
TESTING

Set selected as default device

Select Cancel

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.