CustomerVault
Secure Repeat Billing and Payment Data Storage

Quick Start Guide

CustomerVault Overview

WHAT IS CUSTOMER VAULT?

CustomerVault is a easy, affordable, and secure way to auto-bill your customers monthly. CustomerVault allows you to enter your customer's information, or for your customer to signup online.

It's as easy as 1-2-3!

1.

Create Subscription Packages

What your customer's pay for monthly is known as a "Subscription Package".

2.

Manually Setup Customers –OR– Online Signup Pages

Your customers can signup online with "Signup Pages", or you can manually enter their payment information yourself.
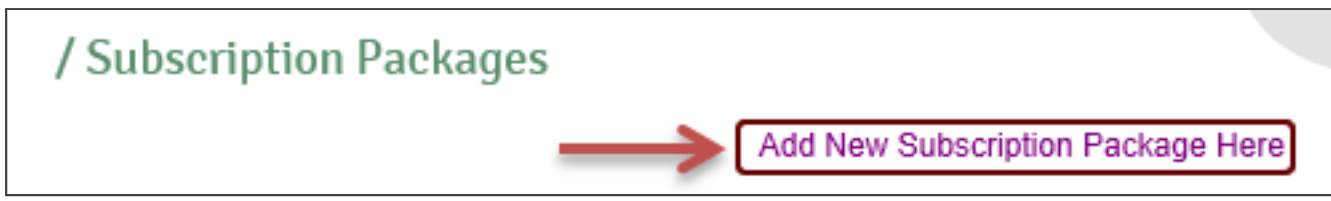
3.

Additional Customization

Upload your logo, change the colors, use forms to gather customer information, and more!

Subscription Packages

What you charge a customer for monthly is known as a "Subscription Package". The first step is creating your Subscription Packages.

1. Login to CustomerVault.com
2. Click **SUBSCRIPTION PACKAGES** from the left menu
3. Click **ADD NEW SUBSCRIPTION PACKAGE HERE**

4. **Set Details Of Subscription Package**

TIP: You can provide a free month trial by setting the initial charge at $0.00

Manually Add Repeat Customers

The quickest way to setup a customer for repeat billing is to manually enter their information.

1. Login to CustomerVault.com
2. Click **ADD SUBSCRIPTION** from the left menu
3. Fill in the customer's personal info, package, amount, and day of month to be auto-billed.

/ Create New Subscription

Customer Info	Subscription Info
Name:	Package:
/	No Package Selected ▼
Email:	Subscription Note: ?
Phone #:	Amount: $
	Day of Month to Bill: 1 ▼ ?

Next Step > Credit Card

4. Click the **NEXT STEP > CREDIT CARD** button

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Manually Add Repeat Customers

Each customer requires a credit card or bank account* attached that will be auto-billed.

1. To add a credit card, click **CLICK HERE TO ATTACH CREDIT CARD.**

** Accounts with the eCheck/ACH option may add an eCheck for the payment method instead for direct withdrawal from the customer's bank account. Contact us to start using eCheck.

TIP: A new window opens to securely enter customer's payment info. You may close it once finished.

Forms

WHAT ARE FORMS?

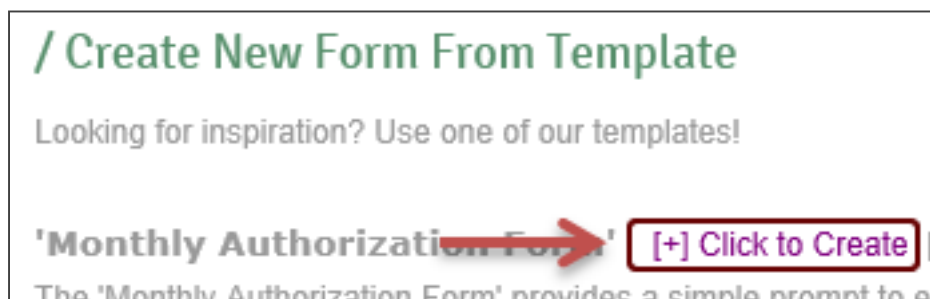Forms are optional, and only applicable if you allow customers to signup online for a Subscription Package.

Forms allow you to gather information about your customer that goes above and beyond basic personal and billing information.

Forms can be used as online contracts to ensure the customer agrees to various terms and conditions.

CREATING A FORM USING A TEMPLATE

CustomerVault provides several templates you can use as a starting point for your personalized form.

1. Login to CustomerVault.com

2. Click **FORMS** from the left menu

3. Locate the template section and click **[+] CLICK TO CREATE** next to the 'Monthly Authorization Form'

Forms

FORM LAYOUT

Forms follow a standard layout to organize information.   Fields are placed inside "Field Blocks". Separate your "Field Blocks" with "Line Breaks" for the best user experience.

Field Block

Text Boxes:

X Checkboxes

TIP: Forms can have a bit of a learning curve. Spend a few minutes experimenting with the Form Builder.

Freeform text that requires no input from the customer.

{ Line Break After Field Blocks }

Field Block

Dropdown Boxes:

Selection #1
Selection #2
Selection #3

Signup Pages

WHAT ARE SIGNUP PAGES?

Signup Pages provide a way for your customer to sign up for a "Subscription Package" and fill out a form you have created.

GET SIGNUP PAGE LINK

1. Login to CustomerVault.com

2. Click **SIGNUP PAGES** from the left menu

Signup Pages

SIGNUP PAGE LINK

You can place the signup link anywhere – such as on your website or in an email newsletter.

Manage Your Customers

DOWNLOADING REPORTS

CustomerVault has several reports available to assist in managing your customer's each month.

• **All Subscriptions**
• **'Non-Current' Subscriptions**
• **Monthly Transactions**

UPDATING CUSTOMERS

Customers can be in one of three states. "Current", "Declined", and with "No Recurring Package".

Use the Customer Manager to view and edit your customers.

1. Login to CustomerVault.com

2. Click **CUSTOMERS** from the left menu

/ 'Current' Customers		
		Displaying 1 - 2 of 2
Customer	**Subscription**	
John Doe	Monthly Widget Delivery	view
john@doe.com	Amount: $0.50	remove
Ph: 2065555478	Day to Bill: 6	
	Last Attempt: [not yet auto-billed]	
Jay Doe	Repeat Payment	view
jay@doe.com	Amount: $0.50	remove
Ph: 2068415795	Day to Bill: 19	
	Last Attempt: [not yet auto-billed]	

Customizing Your Preferences
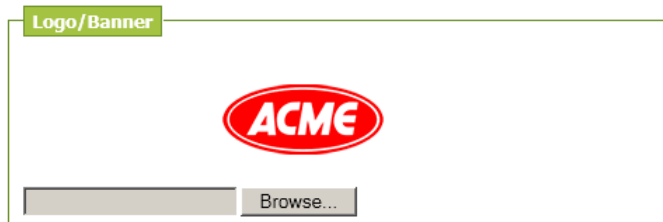
CustomerVault Customization Options

Access your CustomerVault Preferences by logging into CustomerVault.com and clicking on "Preferences" from the menu.

Set Color Scheme

The **PREFERENCES** menu option allows you to select from one of our preset color scheme templates, or advanced users can update their stylesheet manually.

Upload Logo

Use the "Logo/Banner" area of the **PREFERENCES** menu to upload your logo.

Developer Tools

CustomerVault Developer Tools

The CustomerVault Developer Tools allow you to integrate CustomerVault into an existing 3rd party system.   Developer Tools is a combination of a simple API and the "Secure Payment Form" which helps you remove the risk of storing, transmitting, or charging credit cards yourself.

Developer Tool Features

Using the Developer Toolset, you can accomplish the following tasks:

a. Create, edit, remove subscriptions
b. Securely store and process payment methods
c. Trigger notifications to 3rd party scripts upon customer signups and charges.

Requesting Access To Developer Tools

Email questions@customervault.com to request access to the Developer Tools suite.

Need More Help?

Contact Us!

questions@customervault.com