

How to manage payment types for roles on Engagifii

9 Steps

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Created by

Engagifii Inc.

Creation Date

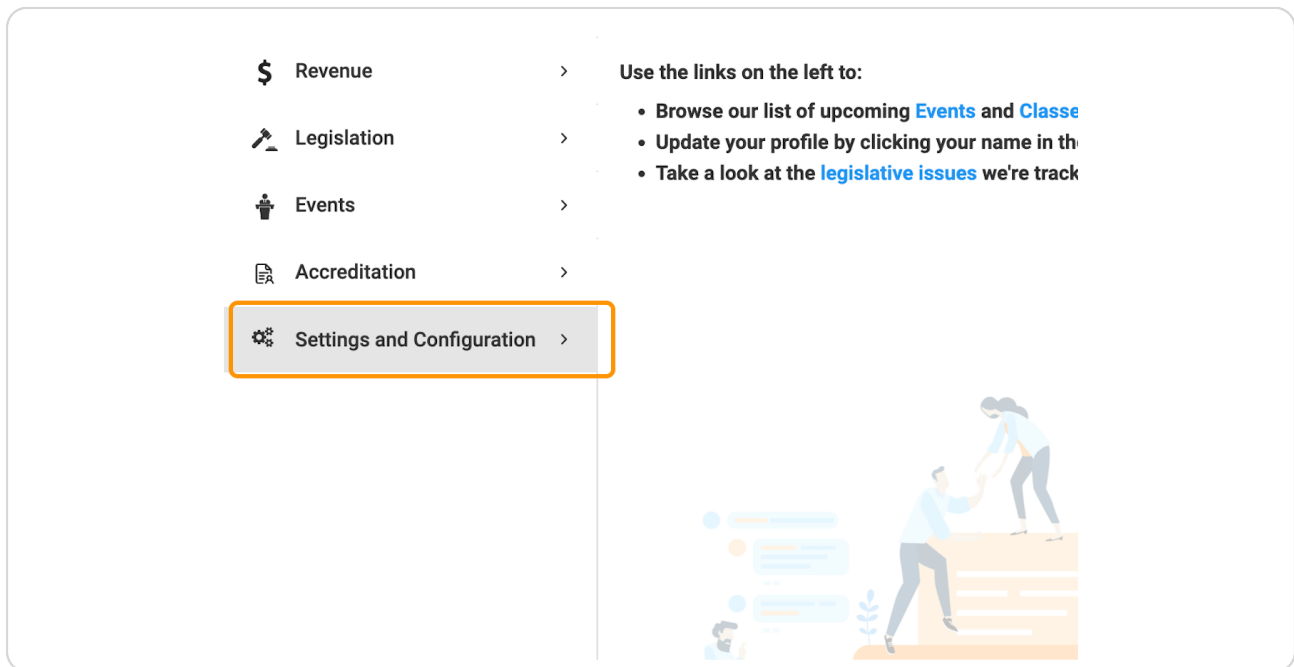
December 19, 2023

Last Updated

December 19, 2023

STEP 1

Click on Settings and Configuration



A screenshot of a navigation menu with the following items:

- Revenue >
- Legislation >
- Events >
- Accreditation >
- Settings and Configuration >** (highlighted with an orange border)

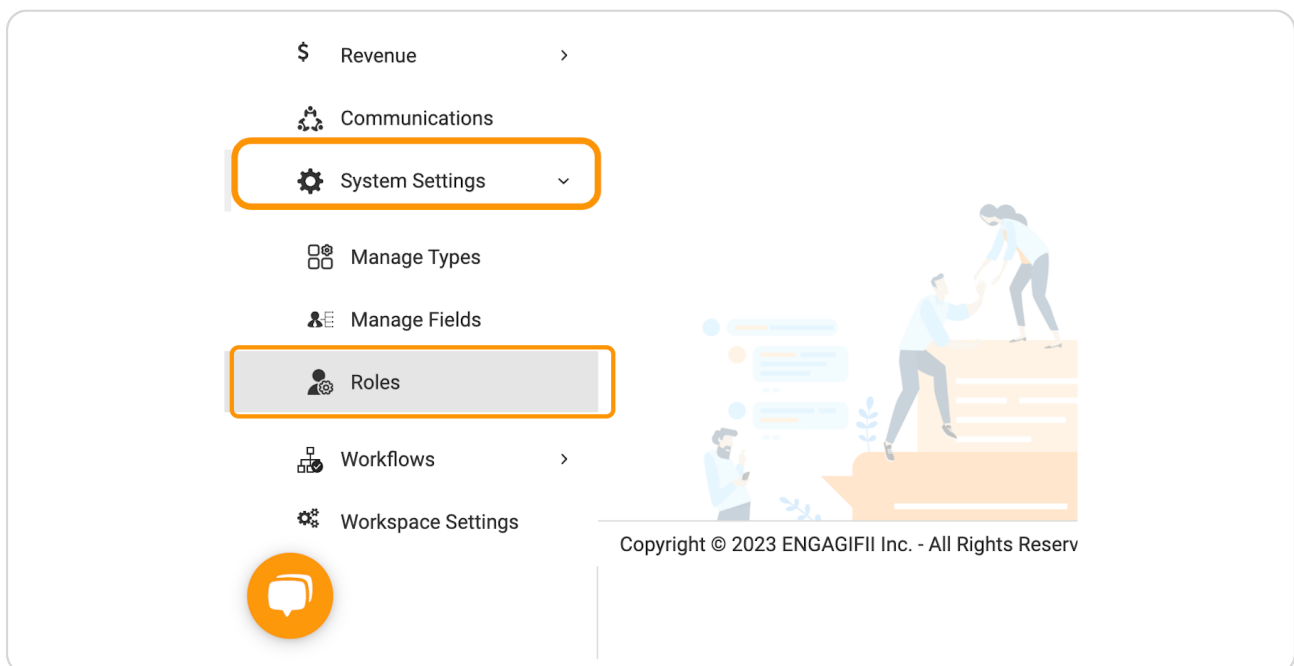
Use the links on the left to:

- Browse our list of upcoming [Events](#) and [Classes](#)
- Update your profile by clicking your name in the top right corner
- Take a look at the [legislative issues](#) we're track

An illustration on the right shows two people climbing a staircase, symbolizing progress or achievement.

STEP 2

Click on System Settings and then Roles



A screenshot of a navigation menu with the following items:

- Revenue >
- Communications
- System Settings** (highlighted with an orange border) >
- Manage Types
- Manage Fields
- Roles** (highlighted with an orange border)
- Workflows >
- Workspace Settings

At the bottom left, there is a circular orange icon with a white speech bubble.

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An illustration on the right shows two people climbing a staircase, symbolizing progress or achievement.

STEP 3

Click on the role you wish to manage

The screenshot shows a sidebar menu on the left with items like 'Configuration', 'Administration', 'Reporting', 'Relationships', 'Emails', 'Notifications', and 'Settings'. The main content area is titled 'Roles' and features a blue 'Add a Role' button. Below this is a table with two columns: 'Role Name' and 'Scope'. The table lists several roles, with 'Board Sec' highlighted by an orange border.

Role Name	Scope
Member	All Module
Board Sec	All Module
Staff User	All Module
View Only	All Module
Global Administrator	All Module

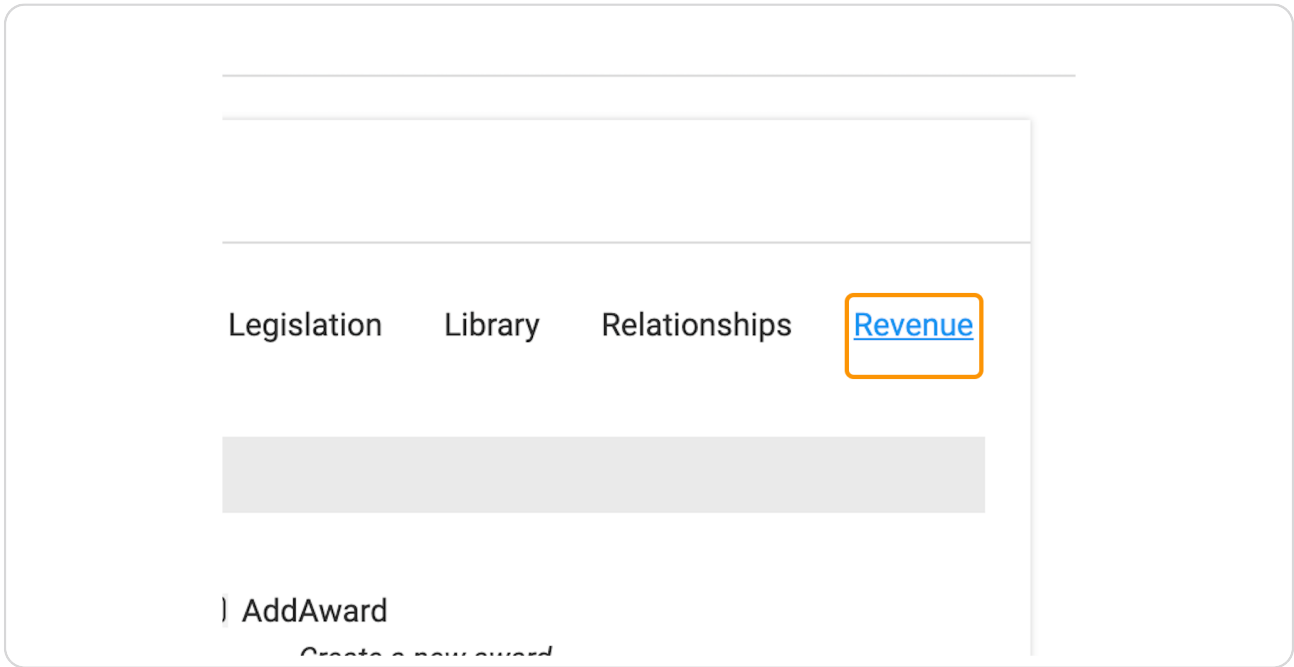
STEP 4

Click on Permissions

The screenshot shows the configuration page for the 'Board Sec' role. At the top, there is a 'Board Sec' header with a user icon, a radio button for 'All Module', and a 'System created role' label. Below this is a tabbed interface with three tabs: 'General', 'Permissions', and 'Users'. The 'Permissions' tab is highlighted with an orange border. Below the tabs, there is a 'Permissions' section with a 'Description:' label.

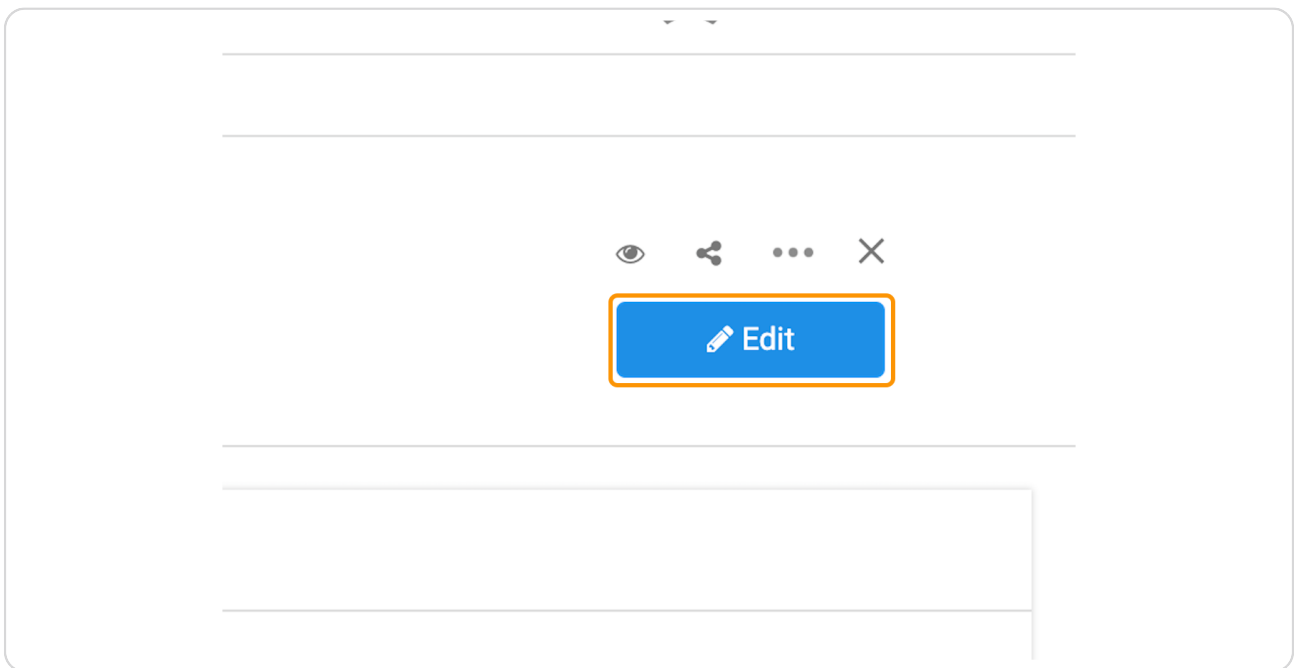
STEP 5

Scroll to the right and click on Revenue



STEP 6

Click on Edit



STEP 7

Click on Pay Later to deselect this option if you want this role to only have the option for credit card payments.

to select Bill Me on the payment page. This means that the logged in user will be invoiced for the registration transaction. This will mostly be relevant for members registering for events, Pre-Conference Workshops, and awards.

to select the "Pay Now" option on the payment page. This means that the logged in user will have to pay for the registration using their credit card. Checking this option and not checking the "Pay Later" option will remove the "Pay Later" option from the payment page. Checking both the "Pay Now" and the "Pay Later" options will enable both the "Pay Now" and the "Pay Later" options on the payment page.

Pay Later
This allows users to select the "Pay Later" option on the payment page. This means that the logged in user can choose to not pay for the registration at the time of registration. An invoice for the registration will be generated and emailed to billing contact to be paid later. Checking this option and not checking the "Pay Now" option will remove the "Pay Now" option from the payment page. Checking both the options will enable both the "Pay Now" and the "Pay Later" options on the payment page.

View Refund Activity
Shows the Activity for a Refund

STEP 8

Make sure Pay Now is selected to ensure users will only have the ability to pay with credit card.

Configuration

Refund a Credit Note

Bill Me
This allows users to select Bill Me on the payment page. This means that the logged in user will be invoiced for the registration transaction. This will mostly be relevant for members registering for events, Pre-Conference Workshops, and awards.

Pay Now
This allows users to select the "Pay Now" option on the payment page. This means that the logged in user will have to pay for the registration using their credit card. Checking this option and not checking the "Pay Later" option will remove the "Pay Later" option from the payment page. Checking both the options will enable both the "Pay Now" and the "Pay Later" options on the payment page.

Refund a Payment

Bill my Organization
This allows users to select Bill My Organization on the payment page. This means that the organization of the logged in user will be invoiced for the registration transaction. This will mostly be relevant for clerks/MoLs registering others for events, Pre-Conference Workshops, and awards.

Pay Later
This allows users to select the "Pay Later" option on the payment page. This means that the logged in user can choose to not pay for the registration at the time of registration. An invoice for the registration will be generated and emailed to billing contact to be paid later. Checking this option and not checking the "Pay Now" option will remove the "Pay Now" option from the payment page. Checking both the options will enable both the "Pay Now" and the "Pay Later" options on the payment page.

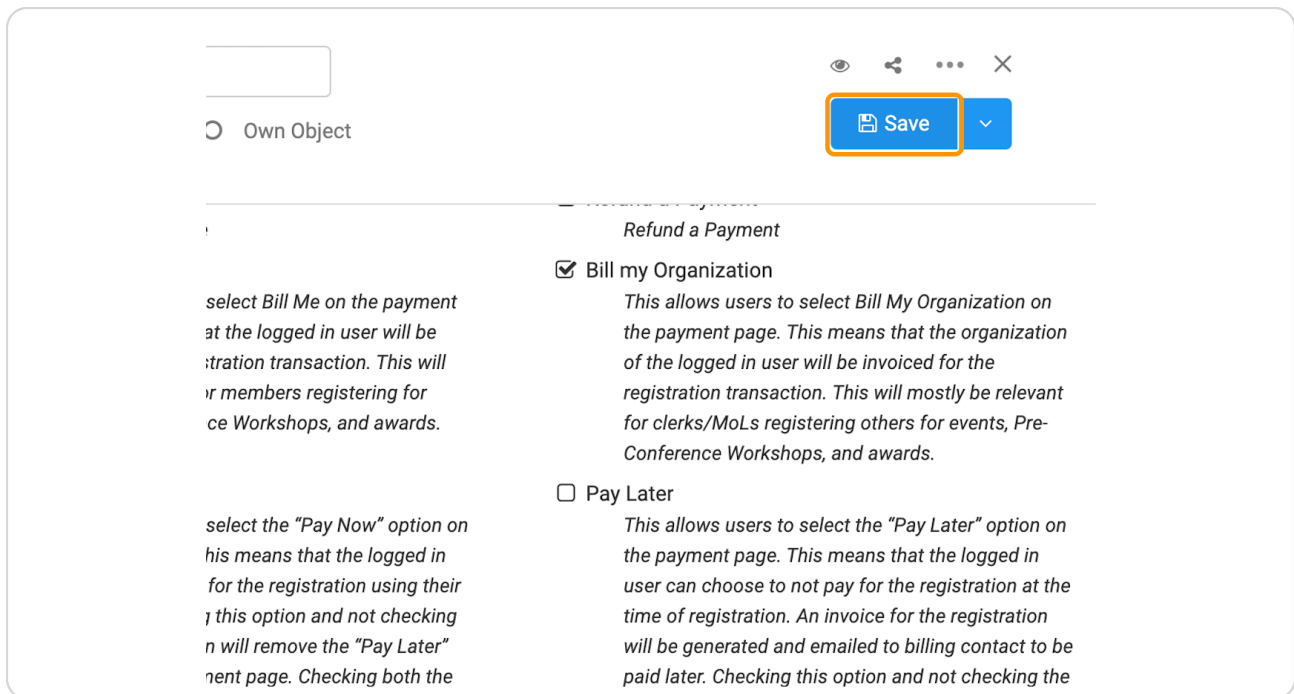
Activities

View Credit Memo Activity
Shows the Activity for a Credit Memo

View Refund Activity
Shows the Activity for a Refund

STEP 9

Click on Save



The screenshot shows a software interface with a search bar at the top left and a 'Own Object' radio button below it. In the top right corner, there are icons for eye, share, and close, and a blue 'Save' button with a dropdown arrow, which is highlighted with an orange box. Below the search bar, there is a section titled 'Refund a Payment' with the following options:

- Bill my Organization**
This allows users to select Bill My Organization on the payment page. This means that the organization of the logged in user will be invoiced for the registration transaction. This will mostly be relevant for clerks/MoLs registering others for events, Pre-Conference Workshops, and awards.
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There is also some partially visible text on the left side of the interface:

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