

Recording Payments on Engagifii

12 Steps [View most recent version](#) 

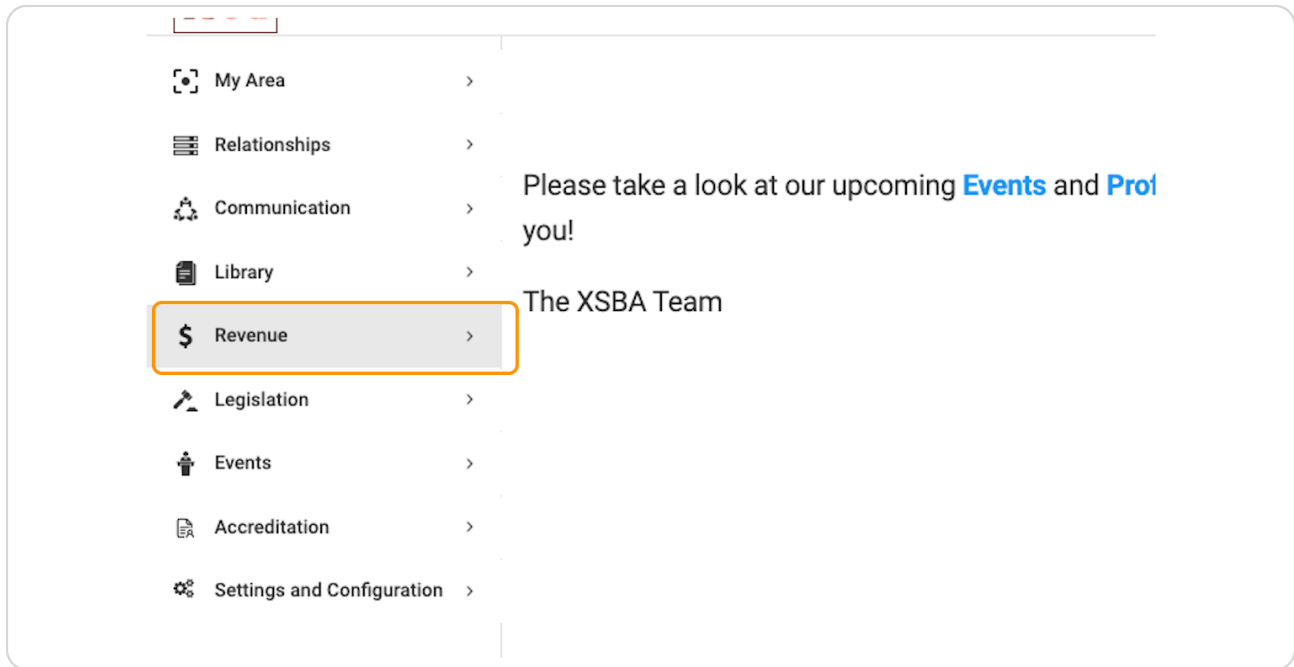
Created by
Engagifii Inc.

Creation Date
November 13, 2023

Last Updated
November 13, 2023

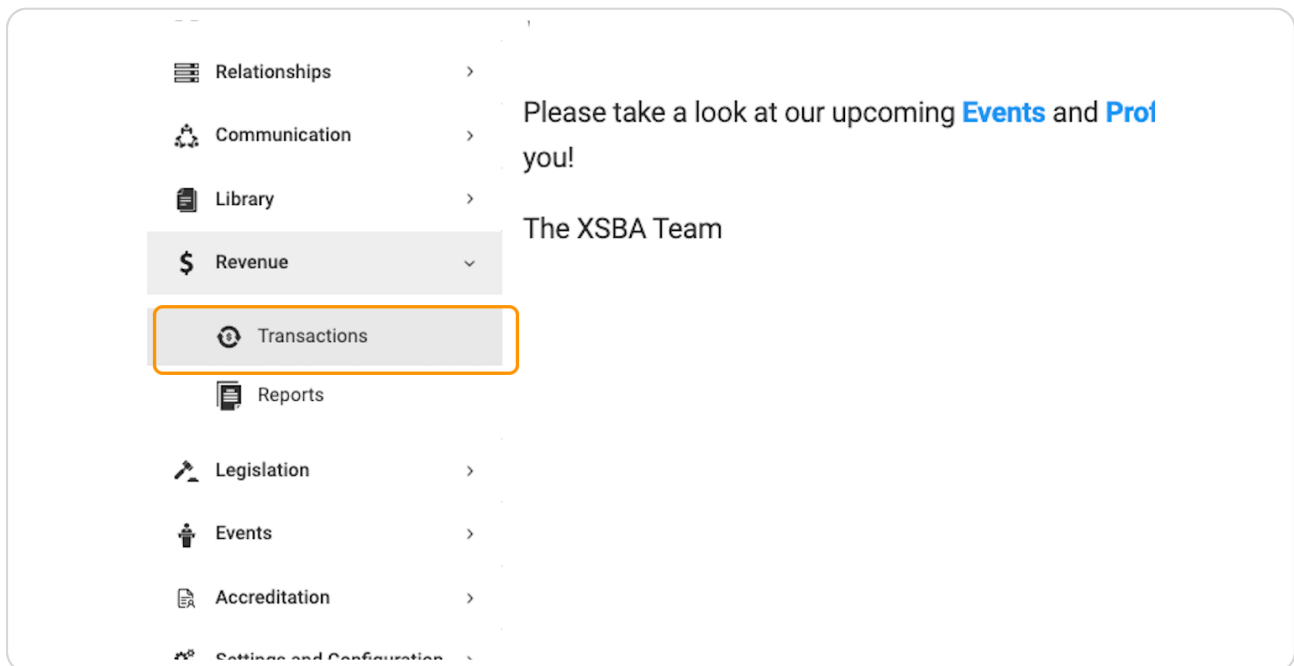
STEP 1

Click on Revenue



STEP 2

Click on Transactions



STEP 3

Search for your unpaid invoice and then click on Record Payment

Page [1/1] 100 of 6 Records

Status	Payment	Invoice: Paid in
Unpaid Due	Record Payment	
Unpaid Due	Record Payment	

STEP 4

Enter a Payment Date and Time

Pmt 10000028

Customer*: XSBA

General Activity Associated Items

Payment Date and Time* Pay

Nov 13, 2023 11:23 AM F

Amount Paid* Pay

\$ 0.00 S

	Invoice Number	Description
+ [1]	Inv 10000088	invoice #Inv 10000088

STEP 5

Enter a Payment Reference Number if applicable

11:23 AM

Payment Reference Number

Payment Reference Number

Payment Method*

Select

on	Due Date	Invoice Amount	Outstanding Amount	Apply Amount*
v 10000088	Dec 07, 2023	\$100.00	\$100.00	\$ 0

STEP 6

Enter the amount of the payment

Pmt 10000028

Customer*: Joe XSBA

General Activity Associated Items

Payment Date and Time* Nov 13, 2023 11:23 AM

Payment Reference Number

Payment Reference Number

Amount Paid* \$ 100

Payment Method* Select

	Invoice Number	Description	Due Date	Invoice Amo
+ [1]	Inv 10000088	invoice #Inv 10000088	Dec 07, 2023	\$100.00

Search Invoice

Memo

Paragraph

STEP 7

Select the Payment Method

Payment Reference Number

11:29 AM

Payment Method*

Select

Select Payment Method

- Check
- Cash
- Credit Card

	Date	↕ Invoice Amount	↕ Outstanding Amount
1000088	7, 2023	\$100.00	\$100.00

Total Amount Applied

STEP 8

Enter amount to apply to this invoice

Amount	↕ Outstanding Amount	↕ Apply Amount*	
	\$100.00	\$ <input type="text" value="100"/>	
		\$ <input type="text" value="0.00"/>	
Total Amount Applied:		\$100.00	

STEP 9

If you set up a credit card processor with Engagifii, click proceed

The screenshot shows the Xiba software interface for entering a transaction. The top navigation bar includes the Xiba logo, a search bar with 'Print 10000028', and a 'Proceed' button. The main content area is divided into sections for 'Credits' and 'Refunds', both showing '\$0.00'. Below this, there are tabs for 'General', 'Activity', and 'Associated Items'. The 'General' tab is active, showing fields for 'Payment Date and Time' (Nov 13, 2023, 11:29 AM), 'Payment Reference Number', and 'Amount Paid' (\$100). A table lists the transaction details, including an invoice number 'Inv 10000088' and an amount of '\$100.00'. A dropdown menu for 'Payment Method' is open, showing options for 'Check', 'Cash', and 'Credit Card', with 'Credit Card' selected. A 'Memo' field is visible at the bottom.

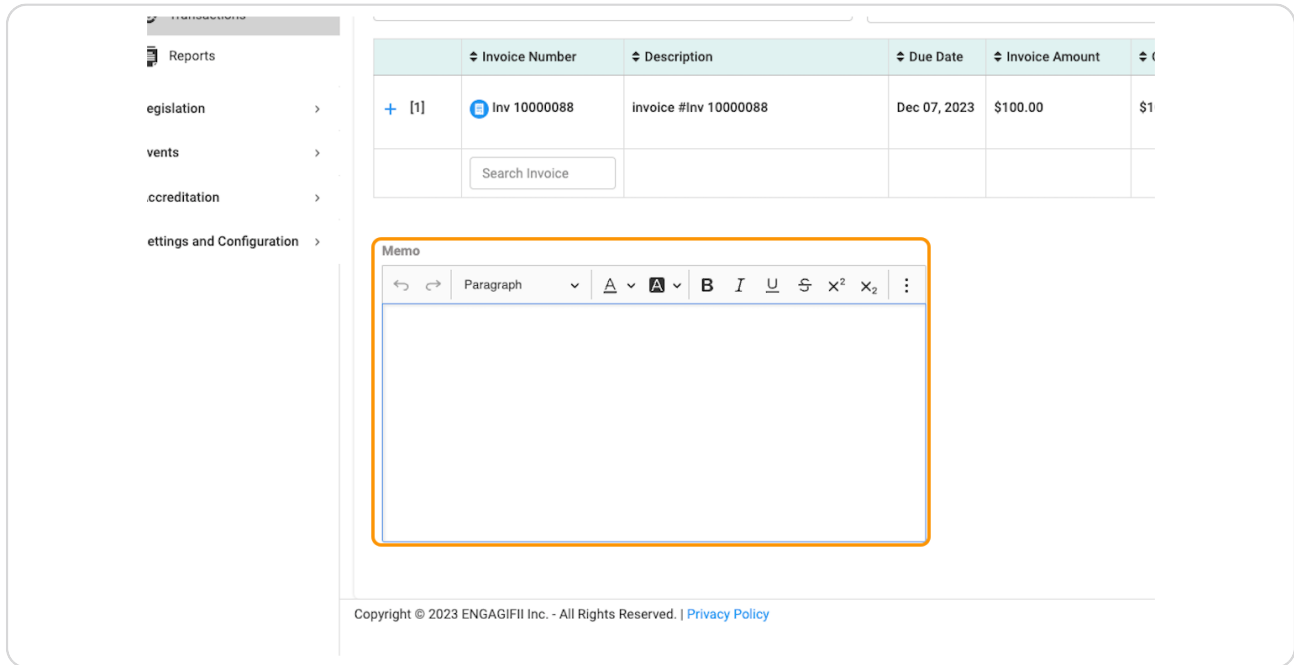
STEP 10

Enter credit card information

The screenshot shows the Xiba software interface with a modal dialog box open. The dialog box is titled 'Add Card Information and Pay' and contains the following text: 'Please add card information below and click the 'Pay' button to make payment. Payment Amount: \$100.00'. Below this, there is a section for 'Credit Card Details' with a 'Card info' field containing 'Card number' and 'MM / YY CVC'. At the bottom of the dialog box, there are 'Cancel' and 'Pay \$100.00' buttons. The background shows the same transaction entry screen as in Step 9, but it is dimmed.

STEP 11

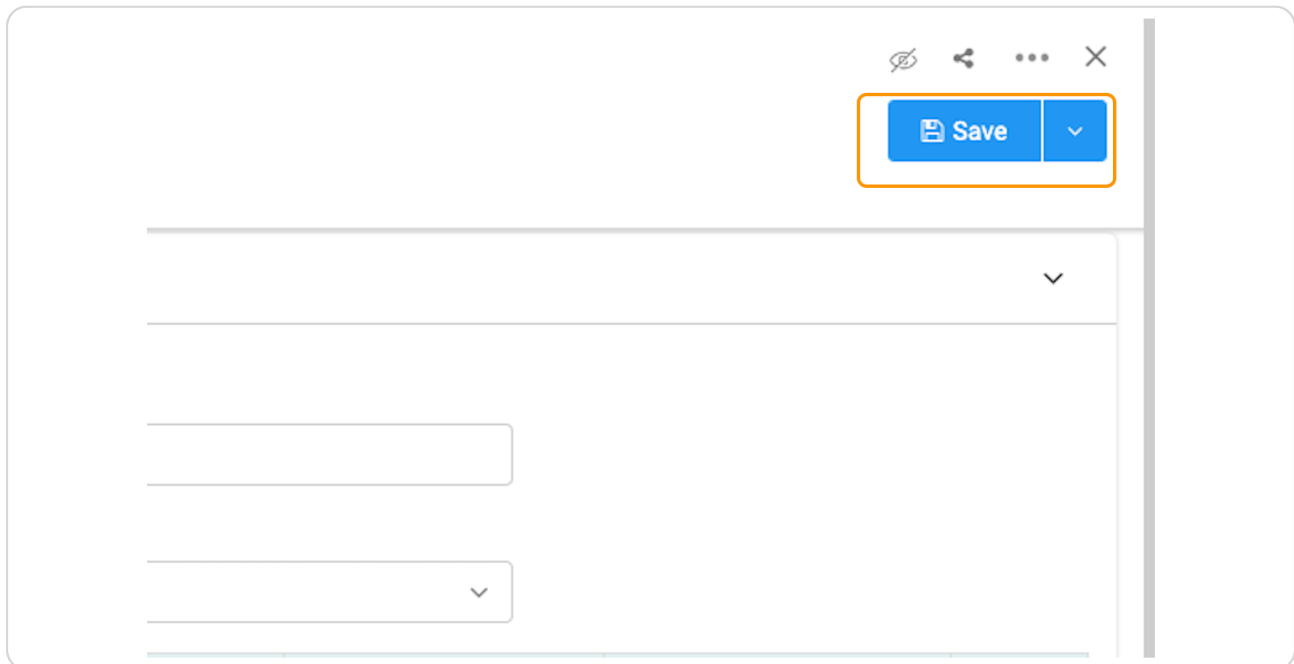
Add any additional notes in the Memo field



The screenshot shows a web application interface. On the left is a sidebar menu with items: Reports, Legislation, Events, Accreditation, and Settings and Configuration. The main area displays an invoice table with columns: Invoice Number, Description, Due Date, Invoice Amount, and a partially visible column. The table contains one row for invoice #10000088 with a due date of Dec 07, 2023 and an amount of \$100.00. Below the table is a search box labeled 'Search Invoice'. A 'Memo' field is highlighted with an orange border, containing a rich text editor toolbar with options for Paragraph, text color, background color, bold, italic, underline, strikethrough, link, unlink, and list. At the bottom, there is a copyright notice: 'Copyright © 2023 ENGAGIFII Inc. - All Rights Reserved. | Privacy Policy'.

STEP 12

Click on Save



The screenshot shows a modal window or form with a blue 'Save' button highlighted by an orange border. The button has a document icon and a dropdown arrow. Below the button are several horizontal lines representing form fields, including a text input and a dropdown menu.

