Revenue Integrations

10 Steps <u>View most recent version</u>

Created by Engagifii Inc. Creation Date October 20, 2023 Last Updated October 20, 2023



Click on Settings and Configuration



STEP 2

Click on Revenue





Click on General Revenue Settings



STEP 4

Click on Integration

,	ℰ Home / \$ Revenue / ③ Revenue Settings
>	General Revenue Settings
>	
>	General Integration
>	Integration Payment Terms
>	
>	Transaction Number Configuration



There are two different Integrations available in Engagifii: Payment Gateways and Accounting Systems (such as QuickBooks)

(-	
	# Home / \$ Revenue / ③ Revenue Settings		
	General Revenue Settings		
	•		
	General Integration		
	Payment Gateways*	>	
	Assumption Durature - Laure and		
	Accounting system Learn more	· · · · · · · · · · · · · · · · · · ·	
	Customer Mapping *	>	
	Payment Terms Mapping *	>	
	QuickBooks Integration 2022-2023 Learn more	>	

STEP 6

The first option is Payment Gateways

We have two integrations available for Payment Gateways: Stripe and Authorize.net. We are also working on adding PayPal to the list of available Payment Gateways

		General Integration		
15		Payment Gateways*		
tion	> >	Stripe Default	Stripe Integration The following connection information will apply for one or both forms of payment with Stripe -credit card processing and ACH processing. By default, credit card processing is enabled.	
	, ,	You can integrate Stripe to accept the following modes of payment: • Credit Card Payments Learn More	API Key Settings	
		ACH Payment Learn More Please note that accepting payments through String requires a senarate	Public API Key	
I Configuration	,	agreement between Stripe and you. Please contact Stripe for more details.	Secret API Key	
itation		Authorize.net	Other Settings	
tion	Ì	Set as Default You can integrate Authorize.net to	Max Allowed Attempts ③	
nships	,	payment: • Credit Card Payments Learn More		
ie	Ĭ	Please note that accepting payments through Authorize.net requires a separate acreement between		
ation Manag		Authorize.net and you. Please contact Authorize.net for more details.	Save	
e/Payment Se				
unications		Accounting System Learn more	>	



Next we have Accounting System, where you can set up your QuickBooks (Desktop) link

Within this section, you can choose the Financial Year, which accounting system you'd like to use (we only have QB Desktop at this time), and you're able to add Authorized Users

General Integration				
Payment Gateways*				>
Accounting System Learn more				~
 Choose Financial Year select Choose Accounting System 	× ×			
	Financial Year	Accounting System	\$ Setup By	Authorize
+ [1] Jul 28, 2022, 5:21:06 PM	2021-2022	QB Desktop Integration	Crescerance Admin	-o Authorize Use
Customer Mapping *				>
Payment Terms Mapping *				>

STEP 8

The following two steps are related to the Accounting System integration



Customer Mapping will allow you to clone the mapping within your QB system



STEP 10

The next one is Payment Terms Mapping, this will sync with QB Desktop

Payment Gateways*			>
Accounting System Learn more			>
Customer Mapping *			>
Payment Terms Mapping *			~
🛛 🧰 Payment Terms		Page [1/1] 10 \checkmark of 1 Records	· * * * ·
□	≎ Due After	♦ AcctSys Sync	ent Terms Actions
Net 30	30 Days	Failed Term 30 Solve	/ 0
	K C	3	
QuickBooks Integration 2022-2023	Learn more		>
Copyright © 2023 ENGAGIFII Inc All Rig	hts Reserved. Privacy Policy		
			Carganna Carganna



