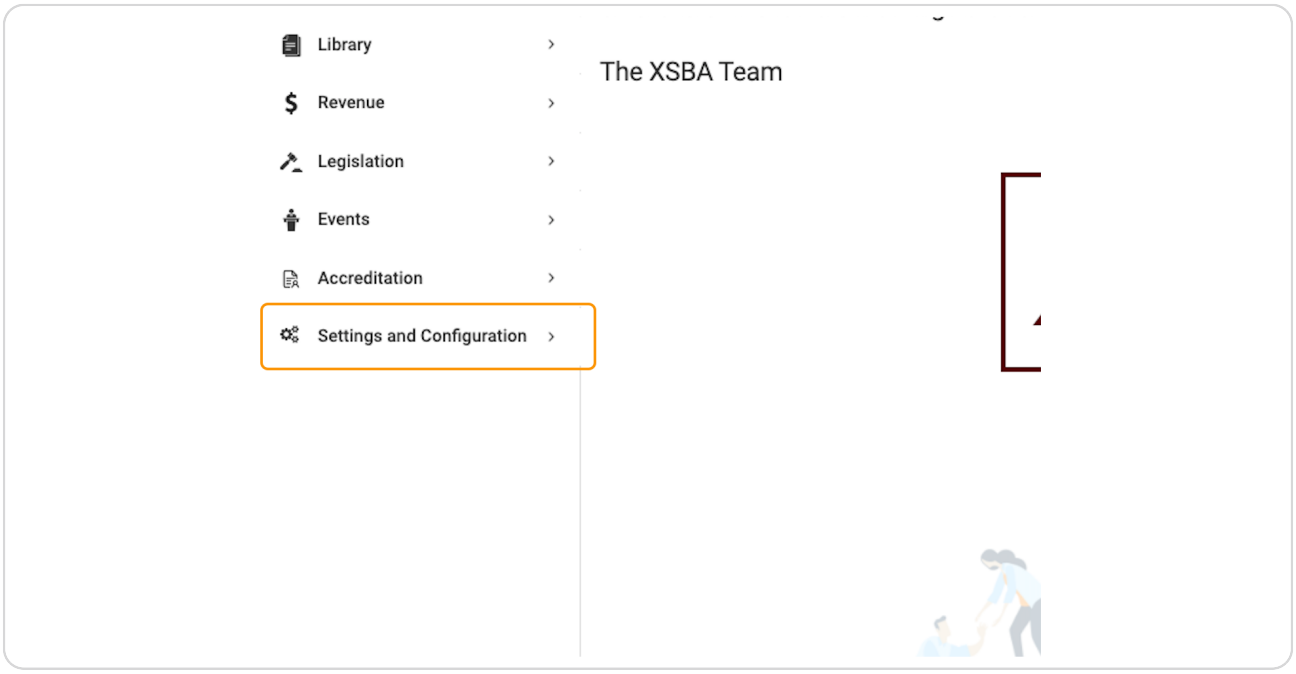
Revenue Integrations

10 Steps View most recent version

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

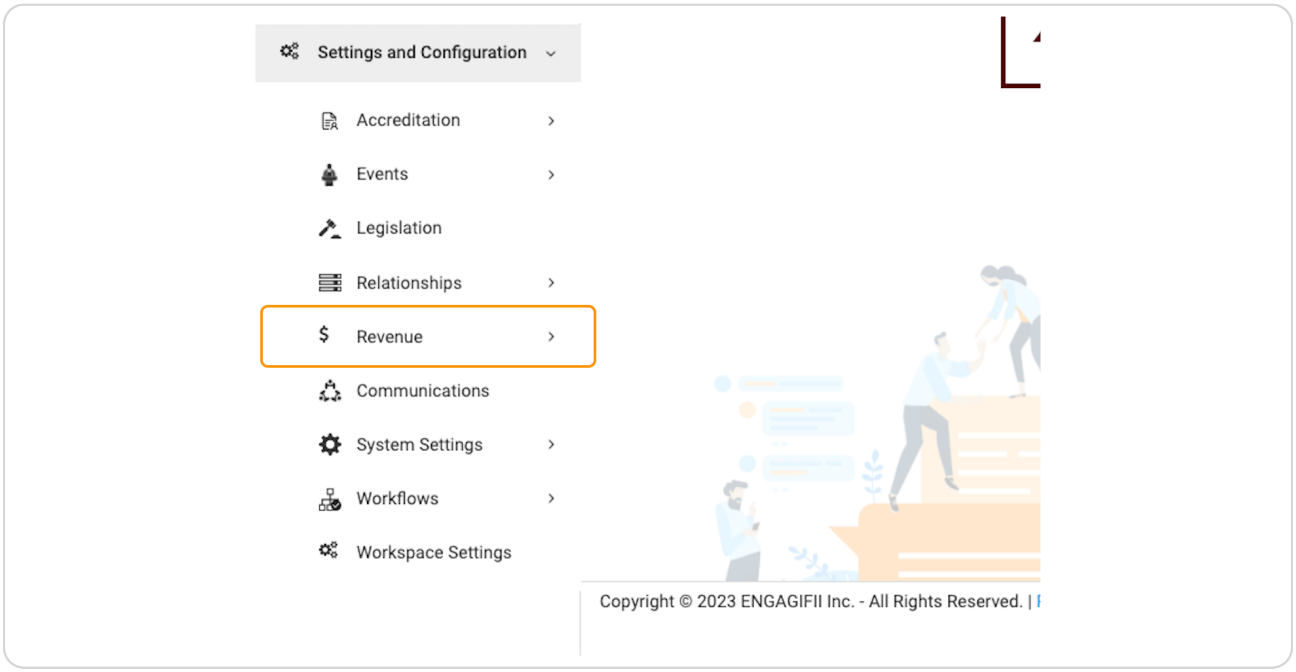
STEP 1

Click on Settings and Configuration



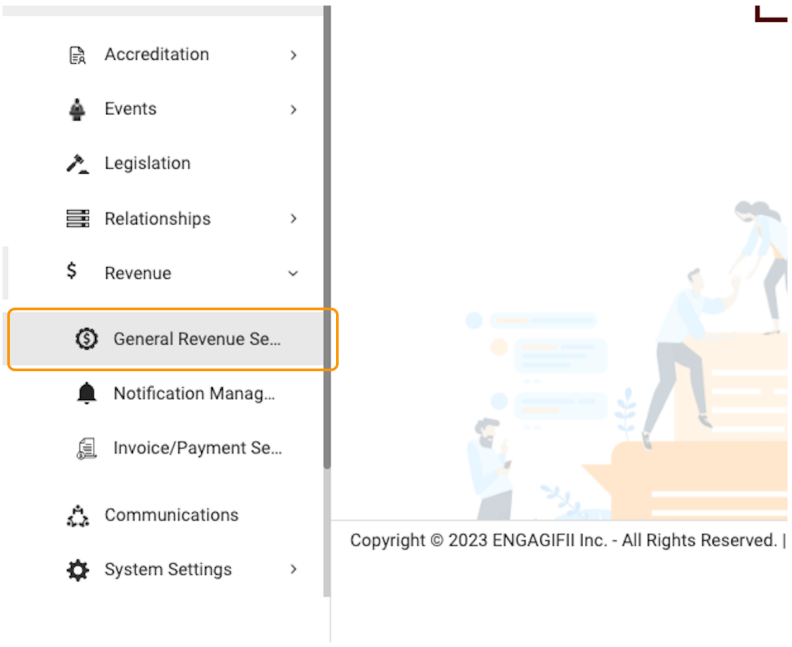
STEP 2

Click on Revenue



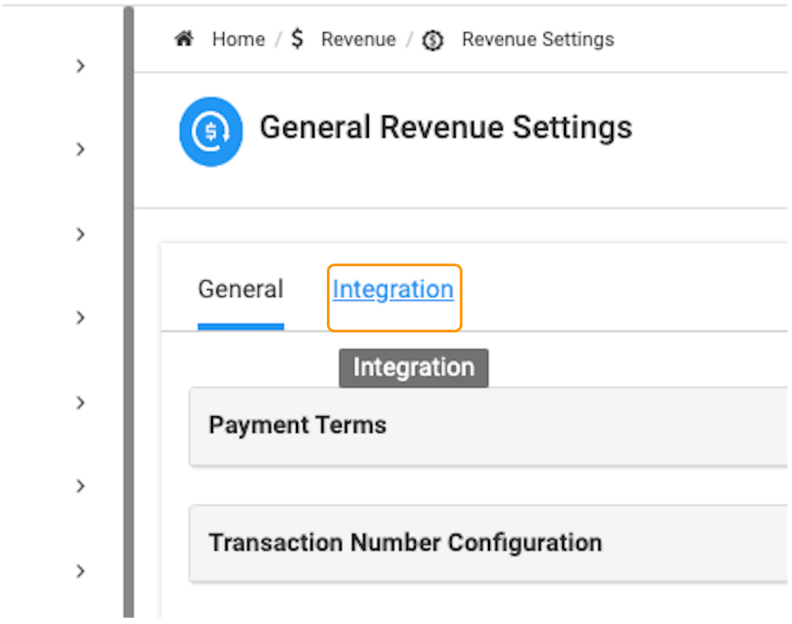
STEP 3

Click on General Revenue Settings



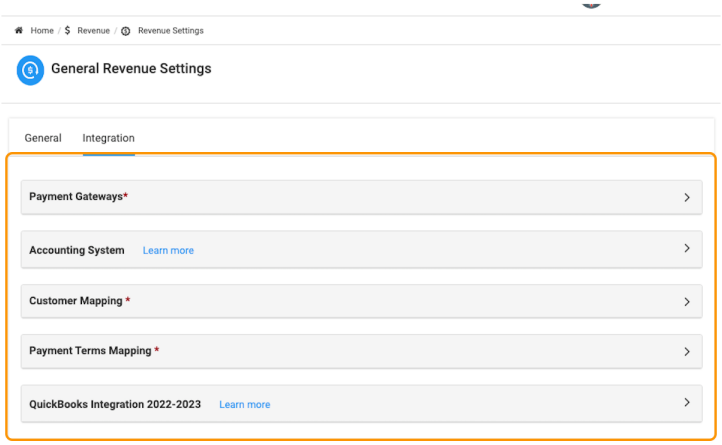
STEP 4

Click on Integration



STEP 5

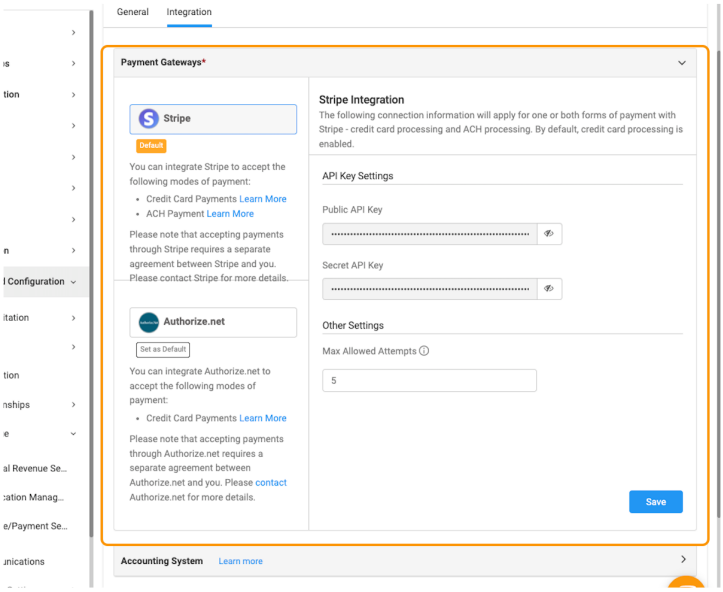
There are two different Integrations available in Engagifii: Payment Gateways and Accounting Systems (such as QuickBooks)



STEP 6

The first option is Payment Gateways

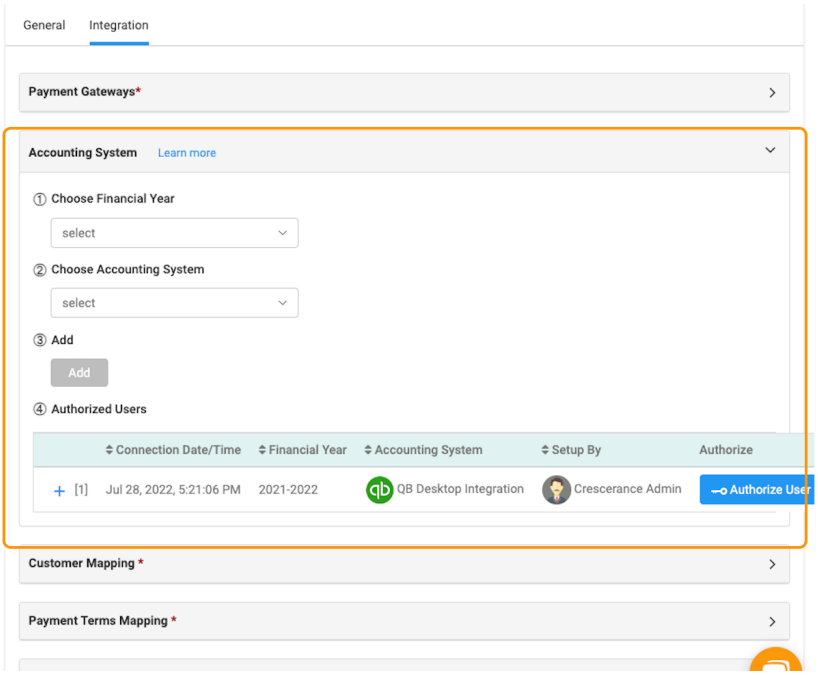
We have two integrations available for Payment Gateways: Stripe and Authorize.net. We are also working on adding PayPal to the list of available Payment Gateways



STEP 7

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



STEP 8

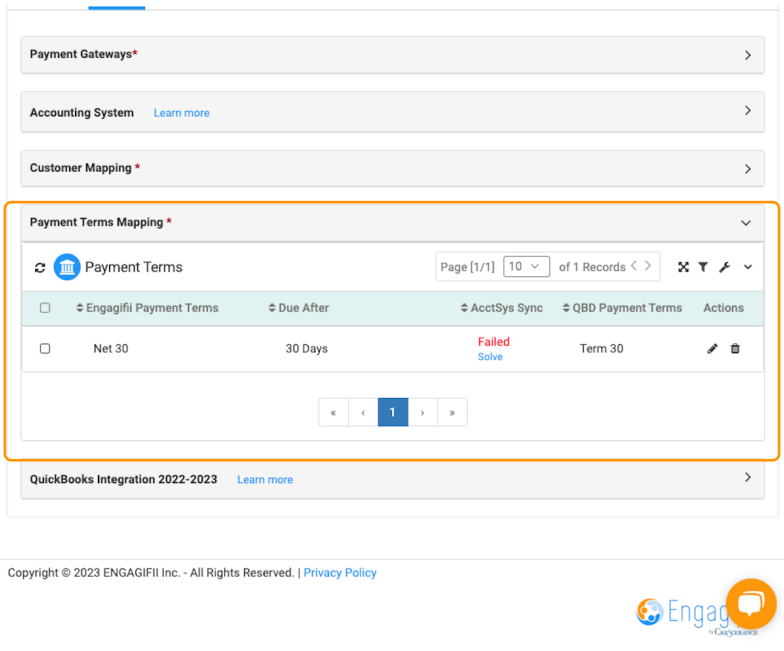
The following two steps are related to the Accounting System integration

STEP 9

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



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