intuit proconnect™

How to Set Up QuickBooks Payments to Work with eSignature Plus Payments in Lacerte

Using your QuickBooks Payments account with Lacerte offers an integrated way to collect payments. If you have an existing QuickBooks Payments account, you can link it with eSignature Plus Payments in Lacerte. If you don't already have a QuickBooks Payments account, you can create a new account within Lacerte. Follow these steps.

If you **have** an existing QuickBooks Payments account
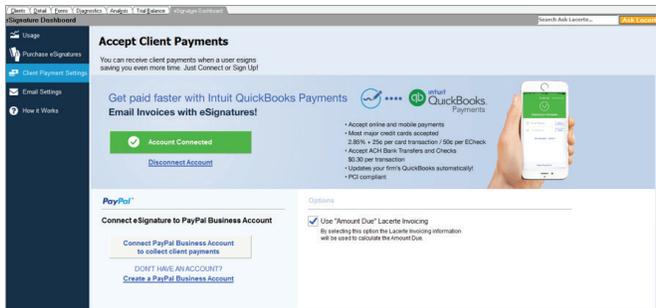
1. Click on the eSignature Dashboard tab in Lacerte, and then select **Client Payment Settings** from the left navigation bar.

2. Click **Connect Intuit QuickBooks Payment,** and Lacerte will guide you through the process.

3. Lacerte connects and turns on the Payments feature in Lacerte. You're now ready to use the eSignature Plus Payments option.

If you **don't have** an existing QuickBooks Payments account
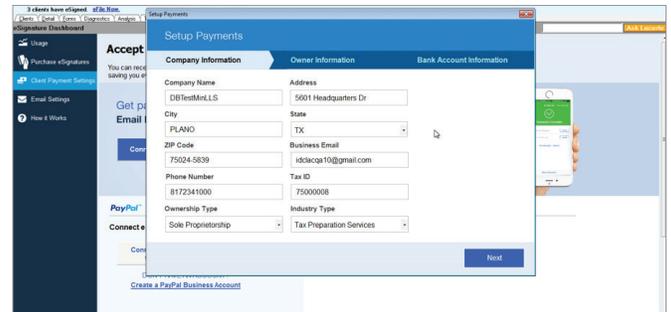
1. In the eSignature Dashboard, select **Client Payment Settings** from the left navigation bar, and click **Or Create an Account.**

2. In the Setup Payments screen, some of your information will automatically populate. Fill in the remaining information on this screen, and click **Next**.

3. Fill in the Owner Information screen, and click **Next**.

4. Fill in the Bank Information screen, and click **Next**.

5. Lacerte will guide you through the application process. After about two or three minutes, your application will be approved or you will receive an email requesting additional information.

6. After approval, Lacerte connects and turns on the Payments feature in Lacerte. You're now ready to use the eSignature Plus Payments option.

For More Information

For more information on eSignature, please visit: **proconnect.intuit.com/esignature-lacerte**
If you have questions, please contact: **esignature@intuit.com**