

# Create an Item

Bursari ™

# 4 Easy Steps for Creating an Item

1

Enter Item Details

2

Select Eligible Students for Item

3

Complete Advanced Settings for Item

4

Confirm Item Creation

## 1

# Enter Item Details

From “Manage Items” tab  
Click **ADD ITEM** and then  
Enter Item details

Including:

- Item Name
- Price
- Bank Account
- Posting Date
- Due Date
- Category
- School Tag (Journal Code)
- Description

The screenshot displays the 'Manage Items' interface. On the left, a list of items is shown:

Item Name	Price	Due Date	Category
Lunch Order - Curre... Miscellaneous	N/A	12/31/2019	Miscellaneous
Lunch Order - Online... Miscellaneous	N/A	05/18/2019	Miscellaneous
Pay Now - link test Miscellaneous	\$550	10/31/2017	Miscellaneous
Technology Fee Stationery	\$200	04/28/2018	Stationery

On the right, the 'Add Item' form is shown with the following details:

- Name:** Grade 4 Field Trip
- Price:** 50.00
- Account:** Checking
- Due Date:** 12/31/2017
- Posting Date:** 11/30/2017
- School Tag:** 4001
- Category:** Field Trip
- Description:** (Empty text area)

A summary box on the right shows: Student Name: Grade 4 Field Trip, Price: \$50.00, Due Date: 12/31/2017 (31 Days Left), and Quantity: 1.

## 2

# Select Eligible Students for Item

Determine which Students are Eligible for this Item

- ALL
- By Grade
- By Group
- By Class
- By Gender
- And more...

The screenshot shows the 'Add Item' form in the Zee Elementary system. The form is titled 'Add Item' and has three tabs: 'Primary Settings', 'Advanced Settings', and 'Eligibility Settings'. The 'Eligibility Settings' tab is active. The form includes the following fields and options:

- Select Grouping**: A dropdown menu.
- Create New Group**: A button with a plus icon.
- OR**: Text separator.
- Select Grade**: A dropdown menu.
- Male** and **Female**: Radio button options.
- Student Name**: A text field containing 'Grade 4 field trip'.
- \$50.00**: Price field.
- Due Date: 12/31/2017 (31 Days Left)**: Due date field.
- Quantity**: A numeric field with a value of 1 and minus/plus icons.

At the bottom of the form, there are 'BACK' and 'SUBMIT' buttons.

## 3

# Complete Advanced Settings for Item

## Advanced Settings

- Mandatory
- Visible under Guest Payer
- Quantity Disabled
- Remove Item Once Paid

The screenshot displays the 'Zee Elementary' Bursari interface. The user is logged in as 'Bob'. The main navigation includes 'Dashboard' and 'Manage Items'. Under 'Manage Items', there are options for 'Items', 'Categories', and 'Groups'. The 'Add Item' section is active, showing a progress bar with three stages: 'Primary Settings', 'Advanced Settings' (current), and 'Eligibility Settings'.

**Advanced Settings**

- Allow Payer Entry Of Amount
- Remove Item Once Paid
- Allow Amount Update
- Mandatory
- Disable Quantity
- Make Visible to Guest User

**Item Details:**

- Student Name: **Grade 4 field trip**
- \$50.00**
- Due Date: 12/31/2017 (31 Days Left)
- Quantity: 1

**Help Text:**

- The options in the checkboxes can be selected according to how you want the item behaviour and appearance in the shopping bag.
- The "Allow Amount Update" option enables the item creator to update the item price on a later stage if he feels the need to do so.
- The "Allow Payer Entry of Amount" option should be cases where you want the amount to be keyed at payer's own discretion. (i.e in case of donations, charity events where the payer can choose how much he wants to donate)
- A mandatory tag will appear on this item, effectively communicating to the user that this item "must" be purchased.

Navigation: **BACK** (left), **NEXT** (right)

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# 4

## Confirm Item Creation

SUCCESS!

The screenshot displays the 'Zee Elementary' dashboard with the 'Manage Items' section active. The 'Add Item' form is visible, featuring fields for 'Select Grade' (set to 4), 'Male' and 'Female' checkboxes, and a 'Quantity' field set to 1. A 'Save Item' modal is open, showing a green checkmark and the message 'Item added successfully.' Below the message are two buttons: 'GO TO ITEM LIST' and 'ADD ANOTHER ITEM'. The background form also shows a 'Due Date' of 12/31/2017 (31 Days Left) and a 'Scheduled for January 4' date. At the bottom of the form are 'BACK' and 'SUBMIT' buttons. The footer includes 'Privacy Policy', 'Terms and Conditions', 'Suggestion Box', 'Copyright © American Academic Capital LLC', and the 'Bursari' logo.