

# Create an Item

Bursari<sup>®</sup> 

# 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

**Dashboard Manage Items**

Items Categories Groups **ADD ITEM**

These items are visible to payers on their item display list page.

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

**Zee Elementary** Welcome, Bob

**Dashboard Manage Items**

Items Categories Groups

**Add Item**

Primary Settings Advanced Settings Eligibility Settings

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  
I

Student Name  
Grade 4 Field Trip

**\$50.00**  
Due Date: 12/31/2017 (31 Days Left)

Quantity  
1

**BACK** **NEXT**

## 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 'Manage Items' interface for 'Zee Elementary'. The user is logged in as 'Bob'. The interface is divided into three settings sections: Primary Settings, Advanced Settings, and Eligibility Settings. The 'Eligibility Settings' section is active, showing a preview of the item: 'Grade 4 field trip' with a price of '\$50.00' and a due date of '12/31/2017 (31 Days Left)'. The quantity is set to 1. The 'Primary Settings' section includes a 'Select Grouping' dropdown, a 'Create New Group' button, and a 'Select Grade' dropdown. The 'Advanced Settings' section includes checkboxes for 'Male' and 'Female', and a numeric input field with the value '40'.

**Zee Elementary** Welcome, Bob

**Dashboard** **Manage Items**

Items Categories Groups

**Add Item**

Primary Settings Advanced Settings Eligibility Settings

Select Grouping

Create New Group

OR

Select Grade

Male  Female

40

Student Name  
**Grade 4 field trip**

**\$50.00**  
Due Date: 12/31/2017 (31 Days Left)

Quantity:  
1

BACK SUBMIT

## 3

# Complete Advanced Settings for Item

## Advanced Settings

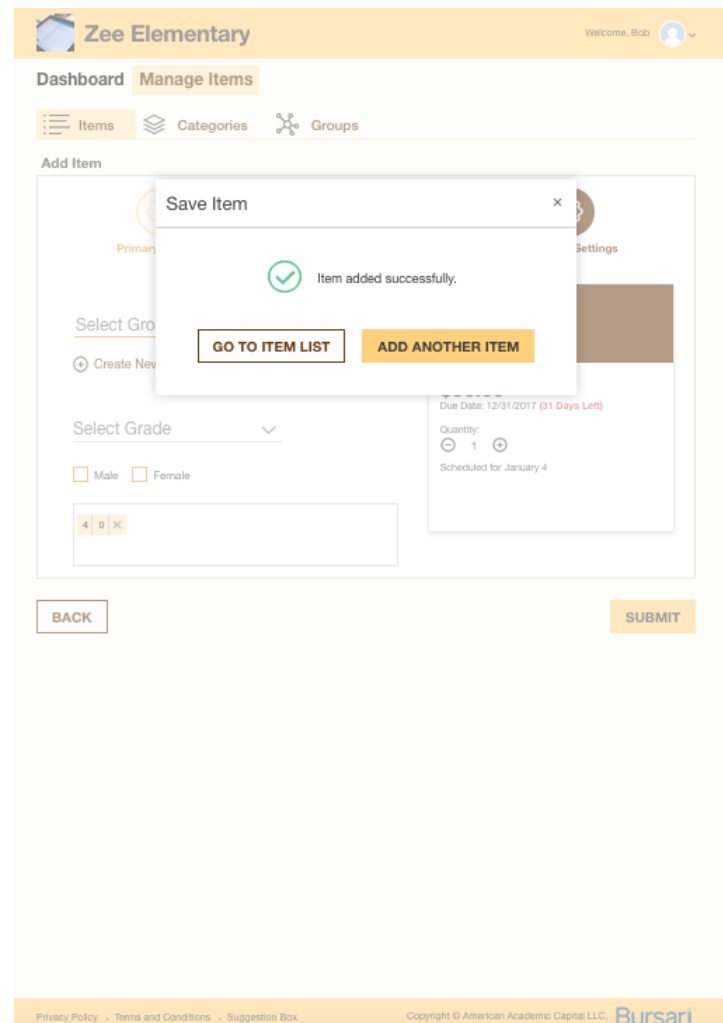
- Mandatory
- Visible under Guest Payer
- Quantity Disabled
- Remove Item Once Paid

The screenshot shows the 'Add Item' page in the Bursari system, specifically the 'Advanced Settings' tab. The page is titled 'Zee Elementary' and 'Welcome, Bob'. The navigation bar includes 'Dashboard' and 'Manage Items', with 'Items', 'Categories', and 'Groups' as sub-options. The 'Add Item' section is divided into three tabs: 'Primary Settings', 'Advanced Settings' (selected), and 'Eligibility Settings'. The 'Advanced Settings' tab contains several checkboxes: 'Allow Payer Entry Of Amount' (unchecked), 'Remove Item Once Paid' (checked), 'Allow Amount Update' (checked), 'Mandatory' (unchecked), 'Disable Quantity' (unchecked), and 'Make Visible to Guest User' (unchecked). A summary box on the right shows the item name 'Grade 4 field trip', a price of '\$50.00', a due date of '12/31/2017 (31 Days Left)', and a quantity of '1'. A 'BACK' button is located at the bottom left, and a 'NEXT' button is at the bottom right. The footer includes links for 'Privacy Policy', 'Terms and Conditions', and 'Suggestion Box', along with the copyright notice 'Copyright © American Academic Capital LLC. Bursari'.

# 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 'SUBMIT' button. A 'Save Item' modal window 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'. A secondary modal window is also visible, showing 'Due Date: 12/31/2017 (31 Days Left)', 'Quantity: 1', and 'Scheduled for January 4'. The footer contains links for 'Privacy Policy', 'Terms and Conditions', 'Suggestion Box', and the Bursari logo.