New Admin Experience System Setup

Quick Guide

April 2026

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Contact Information

For information and support prior to the deployment process, contact your Client Manager.

For post-deployment support, contact Illumia Client Support at 1-888-381-8054 or log in to Illumia Connect.

Table 1 Document Version History

REVISION NUMBER	RELEASE DATE	CHANGES MADE
1.04	February 2026	Updated the browser requirements list. Added CRC enhancements in release 2026.1.
1.05	February 2026	Added Edge 111 to the web browser compatibility list. Added a note regarding other Chromium-based browsers.
1.06	March 2026	Added macOS to the web browser compatibility list.
1.07	April 2026	Updated for release 2026.2.

About This Document

This guide outlines the steps to configure Integrated Payments, enabling access to the Administration portal and any purchased modules. For more advanced configurations, refer to the documentation referenced within this guide.

IMPORTANT: This document is for users of the New Admin Experience, which includes Integrated Payment's updated tools and interface. It provides instructions based on the latest features and workflows. If you are using the Classic Admin application, please refer to the *Classic Admin System Setup User Guide*, as the layout and functionality are different.

Scope

Provide step-by-step instructions to help operators effectively customize and configure the Integrated Payments system to meet specific organizational requirements.

Audience

This document is intended for system administrators who configure Integrated Payments modules.

Glossary

The table below defines terms relevant to this document's content.

Table 2: Document Glossary

TERM	DEFINITION
Operator	Anyone with access to sign in to Integrated Payments.
Cashier	An operator with cashiering privileges.
Customer	A student or non-student payer.
System Administrator	An operator with expanded access to Integrated Payments; responsibilities include system setup and maintenance.

References

This document refers to the following documents and other resources.

Table 3: Referenced documents.

TITLE	URL / FILE LOCATION
ePayment User Guide	Support Library > Modules and Services > ePayment and eMarket
eMarket User Guide	Support Library > Modules and Services > ePayment and eMarket
Cashiering User Guide	Support Library > Modules and Services > Cashiering
eBill User Guide	Support Library > Modules and Services > eBill
eRefund User Guide	Support Library > Modules and Services > eRefund
Payment Plans User Guide	Support Library > Modules and Services > Payment Plans
Classic Admin System Setup User Guide	Support Library > System Administration

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1 Getting Started with Integrated Payments

The Integrated Payments solution offers a comprehensive suite of tools designed to streamline payment processing across higher education institutions. These solutions enhance the experience for students and campus financial teams through secure, flexible, and user-friendly platforms.

Integrated Payments is built with a flexible, modular system that uses tables to control how it works, no custom programming is needed. Everything from formats to rules and procedures is managed through user-configurable settings.

1.1 Browser Requirements

Integrated Payments products support the following web browsers and later versions:

Table 4 Supported Browsers

MICROSOFT OS	
Browser	**Version**
Chrome 111	(Released March 2023) and later
Safari 16.4	(Released March 2023) and later
Firefox 128	(Released July 2024) and later
Edge 111	(Released March 2023) and later
Note: Other Chromium-based browsers may function as expected but have not been individually validated.	
macOS	
Safari 16.4	(Released March 2023) and later
Note: While other browsers are available on macOS, Safari is the only one officially validated.	

Customers, Payers, and Operators must update their web browsers regularly to maintain compatibility with our products.

1.2 Signing In to Integrated Payments

1. All operators must have an operator ID and password to sign into Integrated Payments. After an institution administrator has created an operator ID and password for you, you may sign into Integrated Payments by accessing the following website:

   https://commerce.cashnet.com/_____?spa=true

   (Please consult your institution's administrator for the full URL.)

   Note: If you have forgotten your password, please click the **Forgot Password** link and enter your operator ID. An email containing instructions to reset your password will be sent to you.

2. At the Sign In screen, enter your credentials, and then click **Sign in**.

   Note: If Single Sign-On (SSO) is configured (as shown in the image below), once your credentials are authenticated, you will be automatically redirected to the Integrate Payments landing page. If Two-Factor Authentication (2FA) is enabled, you will be prompted to complete a second step of verification. For information on 2FA, please refer to the *Classic Admin System Setup Guide*.

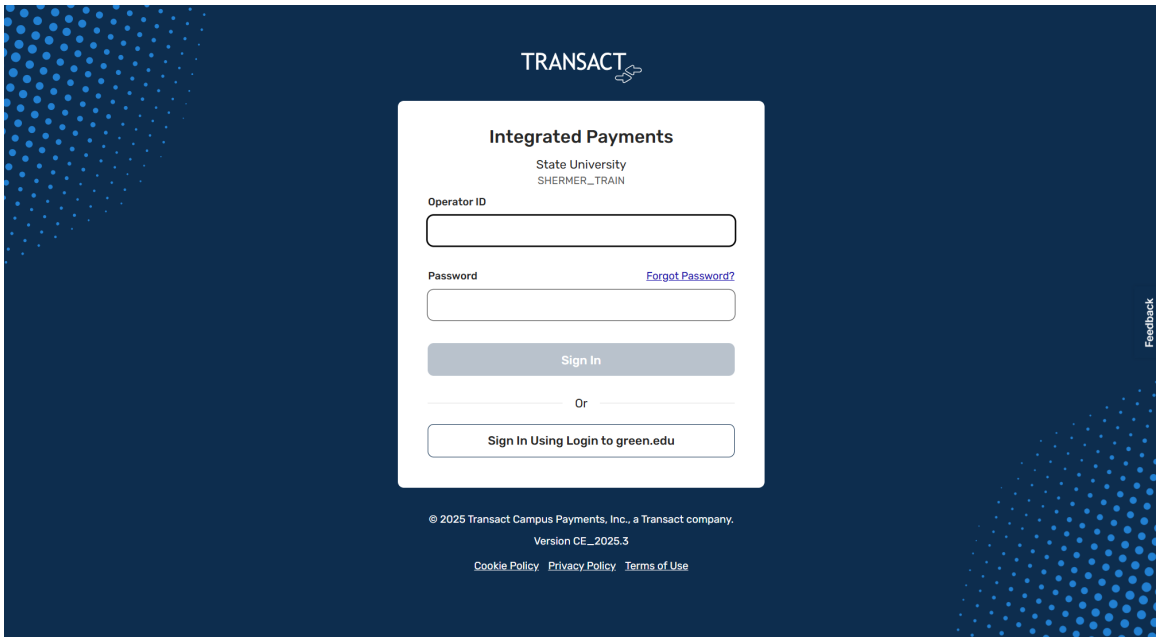

Figure 1 Sign In Screen

1.3 New Admin Experience Home Page

Once signed in, the home page displays. Refer to Table 5 below for a list of available options along with their descriptions.

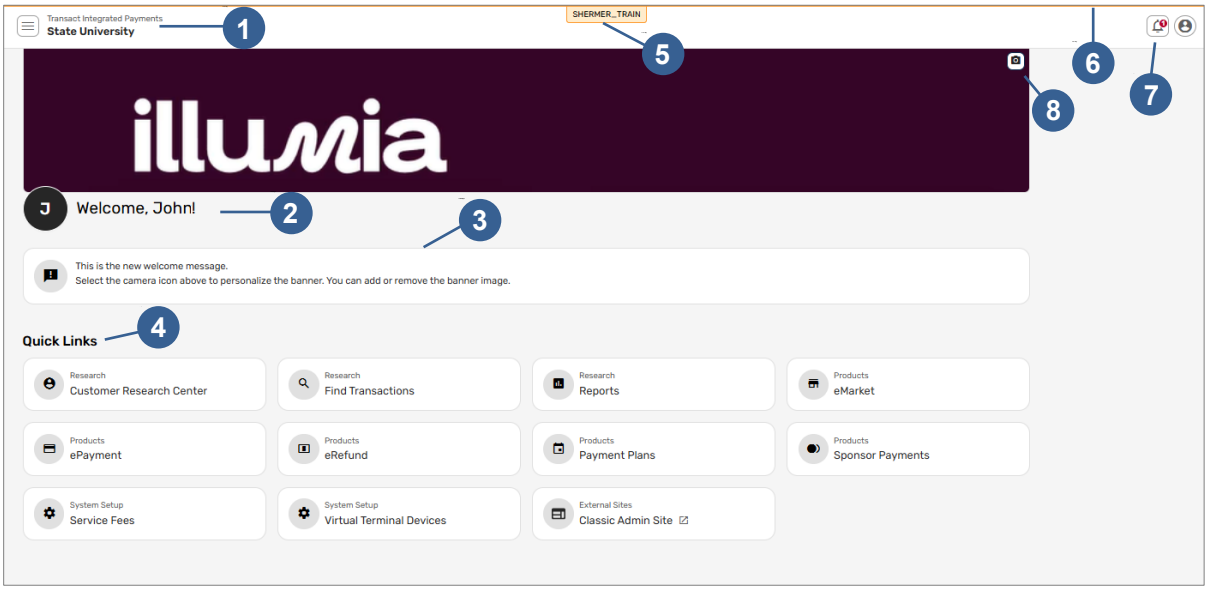

Figure 2 New Admin Experience Home Page

Table 5 Admin Portal Option Descriptions

OPTION #	DESCRIPTION
1	Displays the Integrated Payments and the associated institution. Use the hamburger menu to access research tools, view available products, navigate to external resources, and review the Integrated Payments version and policy information.
2	Displays the name of the operator currently signed in.
3	This section can be used to display important announcements to all operators signing into Integrated Payments such as a welcome message. Basic HTML formatting is supported. You can set this message in Classic Admin by navigating to: System Setup > Miscellaneous > Variable Text > Cashier Home Page.
4	Provides quick links (or tiles) for the modules that you have access to.
5	Displays the client that the operator is currently signed in to.
6	The color of the ribbon indicates the type of environment the operator is signed in to. Blue = Client environment. Yellow = TRAIN environment.

OPTION #	DESCRIPTION
7	 Click to display the operator ID and operator name of the currently signed-in account. The dialog box includes quick links for updating your password, configuring SMS notifications, or signing out of the session.  The notification bell helps operators stay informed about items that need attention, such as password expiration, business date being out of sync, and other important alerts. The notification icon is always visible in the header. When there are active notifications, a red circle appears on the bell displaying the number of unread items. If the count exceeds 99, it will display as 99+. To view your notifications, click the notification bell to open the list. Each notification includes an icon that indicates its level of importance: ○ Blue icons represent informational messages. ○ Orange icons indicate warnings or items that may require action. ○ A red exclamation mark signals an error that needs immediate attention.
8	 Provides a method to change or delete your banner image. Please ensure that you adhere to the image requirements.

2 Customer Research Center

The Customer Research Center (CRC) offers a centralized interface for accessing detailed customer information. It is designed to support users in efficiently managing customer inquiries, reviewing outstanding balances, assisting customers with understanding and managing their payments, and applying corrective actions or making informed decisions when necessary.

Note: This module is not available by default. To enable it, please contact your Account or Client Success Manager.

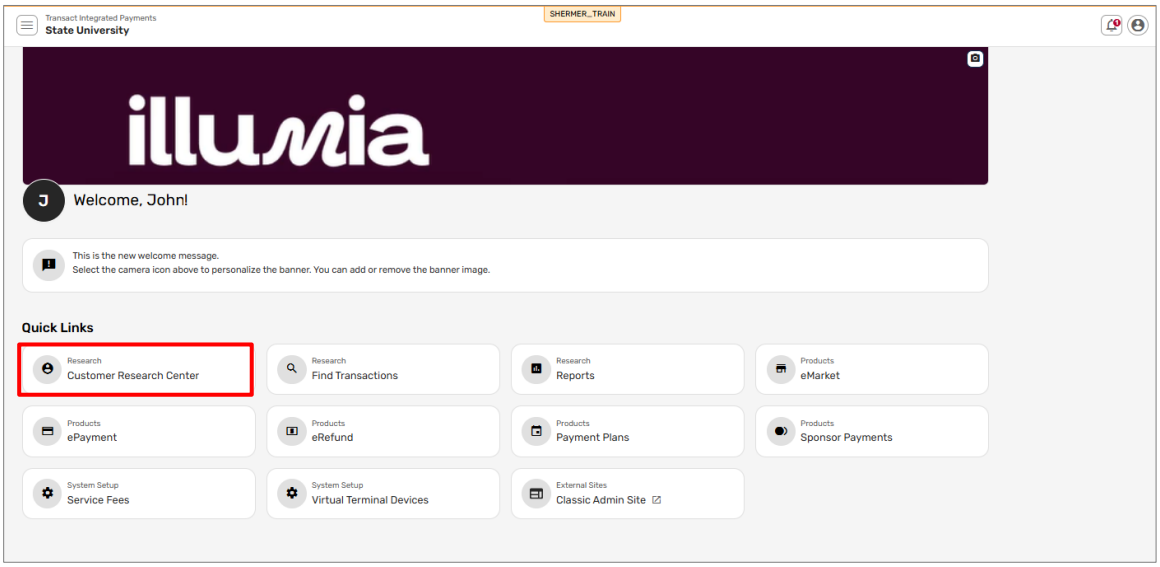

Figure 3 Customer Research Center Tile

When searching for a customer, you can enter an ID along with the ID Type, search by name or email, or select a record from the “Choose a Recent Customer” column.

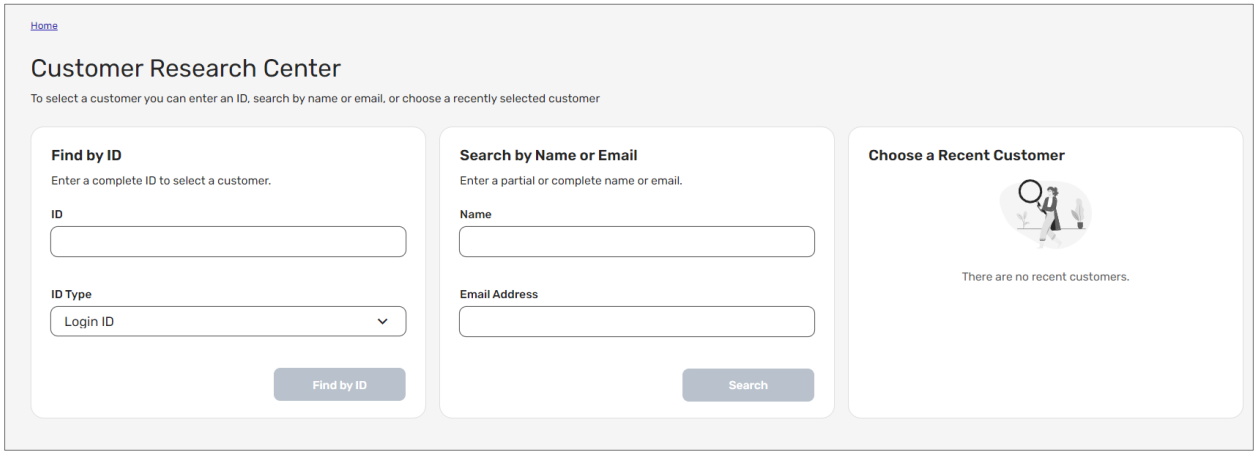

Figure 4 CRC Landing Page

2.1 Find a Customer by ID

Use the “Find by ID” option to search for a customer by their identification number.

To search for a customer by ID:

1. Enter the customer’s ID number.

   Note: You must enter the complete ID number.

2. Click the “ID Type” dropdown list and select the ID type.

   Note: The ID types available may differ by institution, depending on their specific configuration settings.

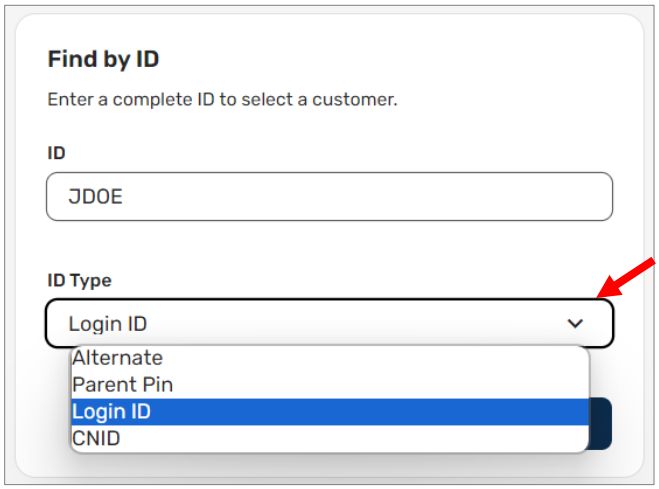

Figure 5 Find ID Search Options

3. Click **Find by ID**.

2.2 Search for a Customer by Name or Email

Use the “Search by Name or Email” option to search for a customer by their name or email address.

To search for a customer by name or email address:

1. Enter a partial or complete name or email address, and then click **Search**.

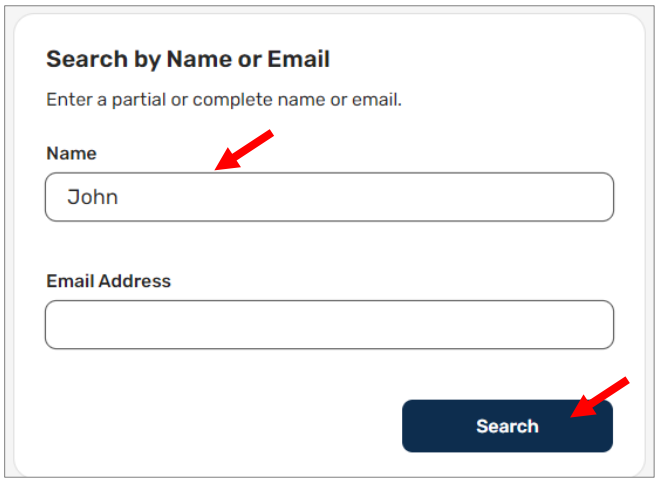

Figure 6 Search by Name Option

CRC displays a list of results that most closely match the entered search criteria. If needed, you can refine the results further by using the search field to narrow your query.

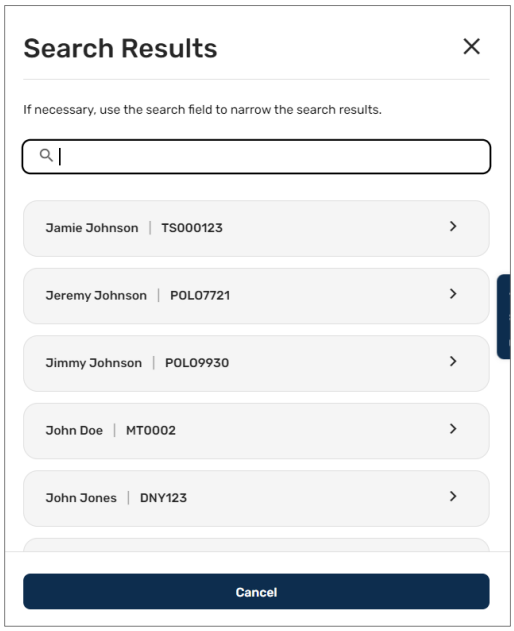

Figure 7 Search Results and Search Field

After selecting, the "Choose a Recent Customer" column will show the customer you recently selected. This list provides rapid access to their information if required again.

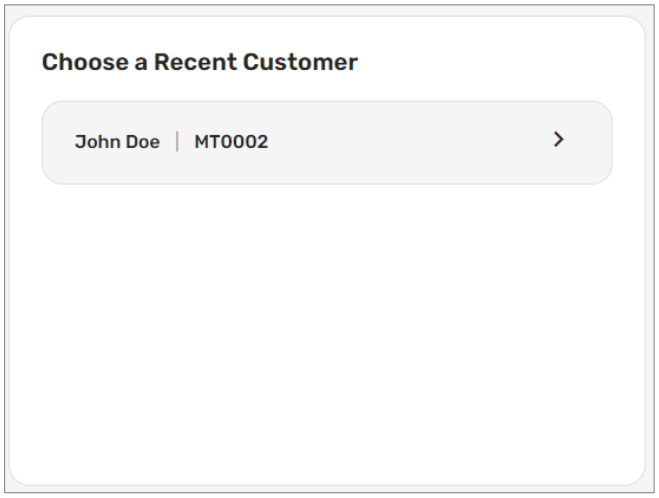

Figure 8 Recently Accessed Customer List

2.3 Customer Profile Page

When you find a customer, the Customer Profile page displays. This page features a left navigation pane that provides access to comprehensive customer details, including account balances, transaction history, statements, and additional information. Refer to Table 6 for the list of navigation links and their descriptions.

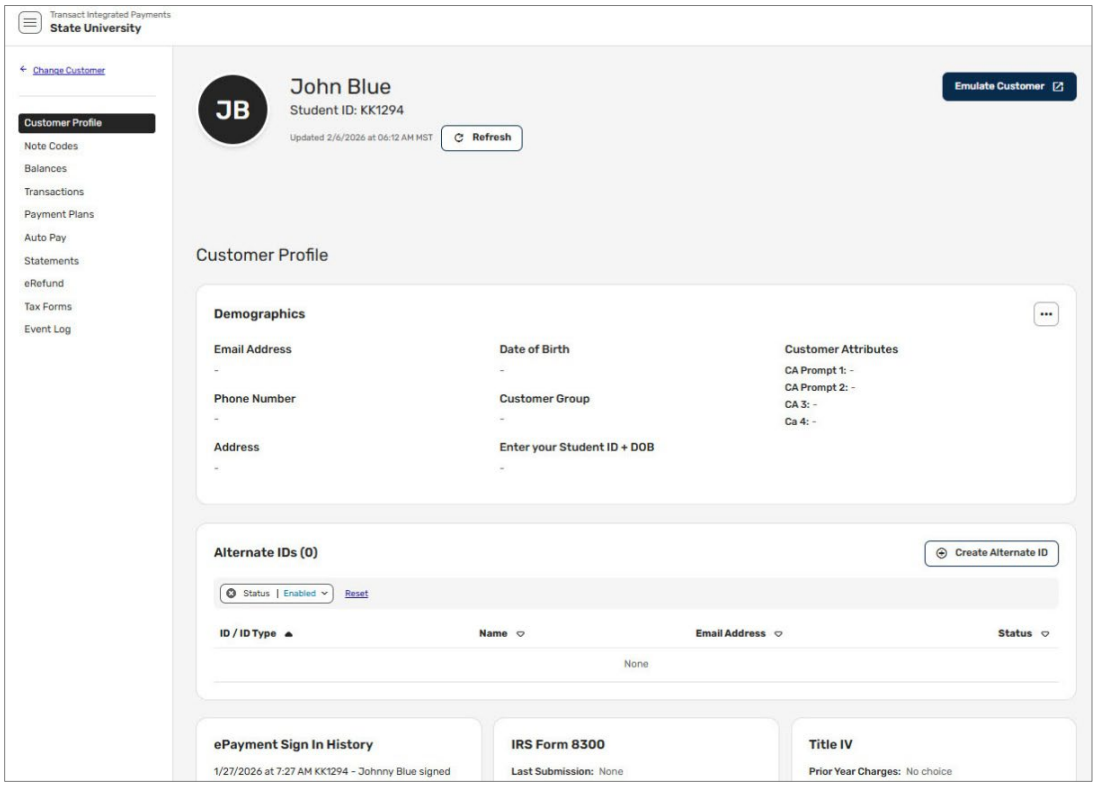

Figure 9 Customer Profile

Table 6 Side Navigation Link Descriptions

OPTION	DESCRIPTION
Customer Profile	The Customer Profile page displays comprehensive customer information organized into several sections. The Demographics section shows contact details including email address, phone number, address, date of birth, customer group, student ID verification, and custom customer attributes. The Alternate IDs section allows you to create and manage multiple IDs associated with the customer account, with options to filter by status and reset the view. Additional sections provide quick access to ePayment sign-in history (showing recent authentication events), IRS Form 8300 submission status, and Title IV information including prior year charges, current year charges, credit balance authorization, and authorization dates.
Emulate Customer	Allows you to replicate the customer's view by displaying the interface exactly as they see it when signed in.
Note Codes	The Note Codes page displays customer account notes organized into two collapsible sections. The Active Note Codes section shows current notes with columns for the note code, restriction type, expiration date, and available actions, with an "Add Note Code" button to create new entries. The Expired Note Codes section contains historical notes that are no longer active. Both sections can be expanded or collapsed to manage screen space and help you track important account flags, restrictions, or administrative notes associated with the customer.
Balances	The Balances page displays the customer's account balances in two sections. The Balances section shows the Total Minimum and Remaining Balance amounts, along with a detailed table listing individual balance descriptions, terms, minimum payment requirements, current balances, and available actions. The Integrated Payments Fees section displays any associated transaction fees with columns for description, term, date entered, and remaining balance. When configured, the system performs a real-time lookup to retrieve current balance information, ensuring you always view the most up-to-date account data. You can remove fees directly from this screen as needed.
Transactions	The Transactions page displays a complete history of customer transactions. You can filter transactions by actual date, business date, or transaction number using the Add Filter button. The transactions table shows the transaction number, date, description, payment method, status, and amount for each entry. To refresh the displayed information, click Refresh at the top of the page.

OPTION	DESCRIPTION
Payment Plans	This page displays all payment plans linked to the selected customer and shows other available payment plans. Use the Actions menu to view payment activity, enroll students, or send invitations to join a plan. Use the Status option to track whether a plan is Active, Withdrawn, Completed, or set with a Promise to Pay. After selecting a payment plan, the Payment Plan Details page displays. Here, you are presented with the plan's description, schedule, any associated Auto Pay Plans, fees, fee rules, plan amount history, and an Action button that allows you to adjust amounts, apply a payment, view the agreement, or withdraw the student from the payment plan.
Auto Pay	Auto Payment Plan allows institutions to require or offer customers the option to set up automatic payments for their Installment Payment Plans. These plans work in conjunction with Integrated Payments modules such as Payment Plans, ePayment, and eMarket. The page displays all Auto Pay plans with their corresponding statuses, including options for Minimum Due, Balance, and New Charge payment types. You can select the checkbox to view deactivated and completed plans in addition to active ones. From this page, you can edit payment schedules and manage Auto Pay configurations for each plan type.
Statements	This page displays a list of published eBills, showing whether they have been viewed and if email or SMS notifications were sent. You can also see viewing activity and use the Actions button ··· to download or print the information.
eRefund	eRefunds are electronic refunds that allow institutions to return funds directly to a student's bank account via ACH (Automated Clearing House) transfer. This option lists all eRefund plans that the selected customer has signed up for.
Tax Forms	The Tax Forms page displays customer tax forms organized by year. The table shows the date, description, viewed status, initial notification status, and reminder notification status for each form. Use the Actions column to perform operations on individual tax forms. Click Refresh at the top of the page to update the displayed information.
Event Log	The Event Log page displays a chronological record of system events with their date/timestamp, event type, and severity level. You can search for specific event types using the search bar, navigate through multiple pages of events using the pagination controls. The severity indicators help you quickly identify alerts (critical issues) versus debug events (routine system activities). To view the event's details, click **View Details**. To copy the information, click **Copy** in the top right corner of the View Details dialog.

3 Find Transactions

The Find Transactions module offers you a method to search for Payment transactions utilizing default filters. Additionally, you can customize your search to align with your preferences by adding or removing filters. You can also utilize additional quick filters accessible by clicking the "Customize" link. Refer to Table 7 for the list of filters and their descriptions.

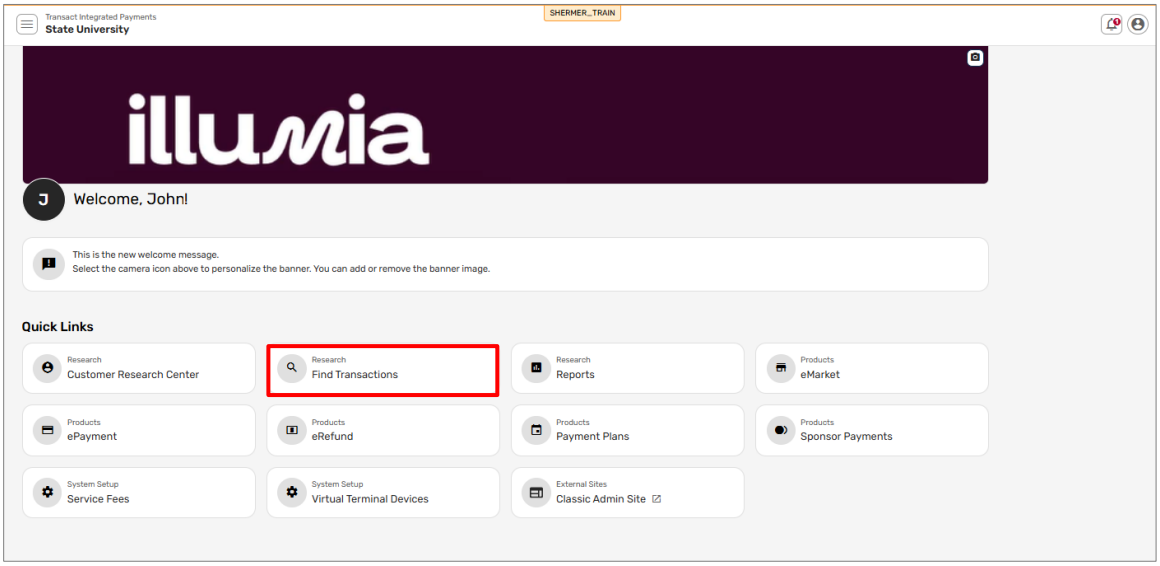

Figure 10 Find Transactions Link

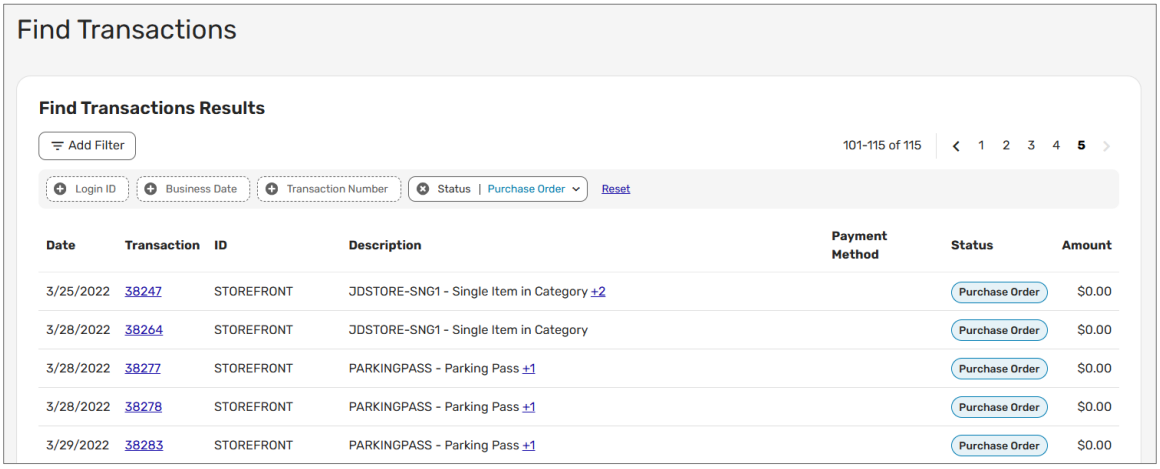

Figure 11 Find Transaction Results Page – Status Filter

3.1 Adding Filters

To add filters to your search:

1. Below the “Find Transactions Results” label, click **Add Filter** or click the **Customize** link.

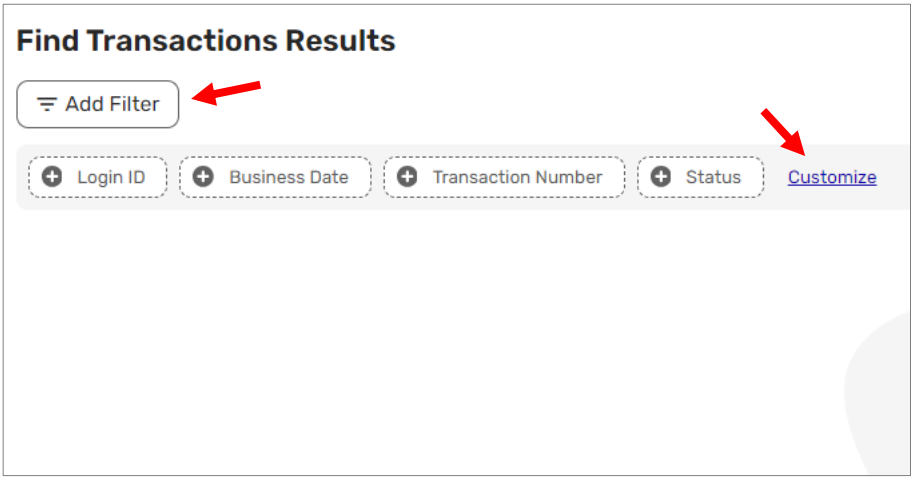

Figure 12 Add Filter and Customize Options

Note: Utilizing the “Add Filter” option offers a way to personalize the search criteria, assisting you in retrieving information more effectively.

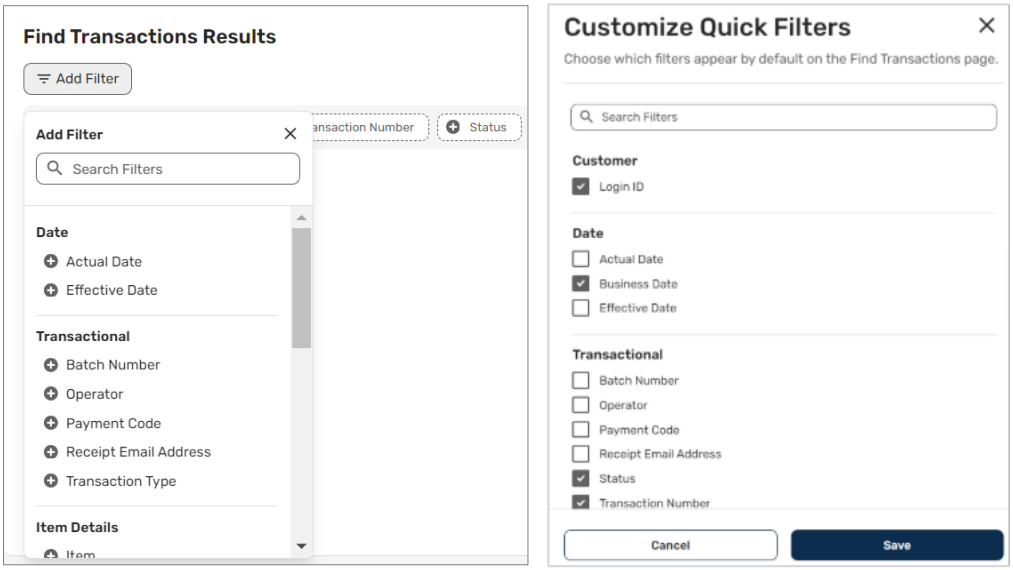

Figure 13 Add Filter and Customize Options

2. Select the “**+**” icon next to the filters you wish to add.
   a) When using quick filters, select the checkbox adjacent to the filter name.

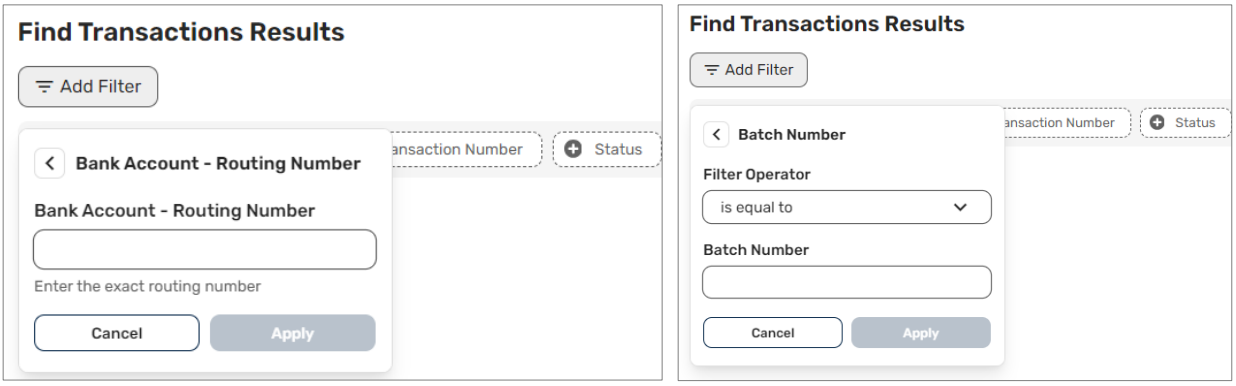

Figure 14 Filter Options

3. Configure the filter per personal preference, and then click **Apply**.

   a) When using quick filters, click **Save**.

   Note: Some filters include an **Advanced Mode** option. Selecting this link displays additional Filter Comparison Operators, which enable more granular control over search results. Select **Switch to Basic Mode** to return to the standard view.

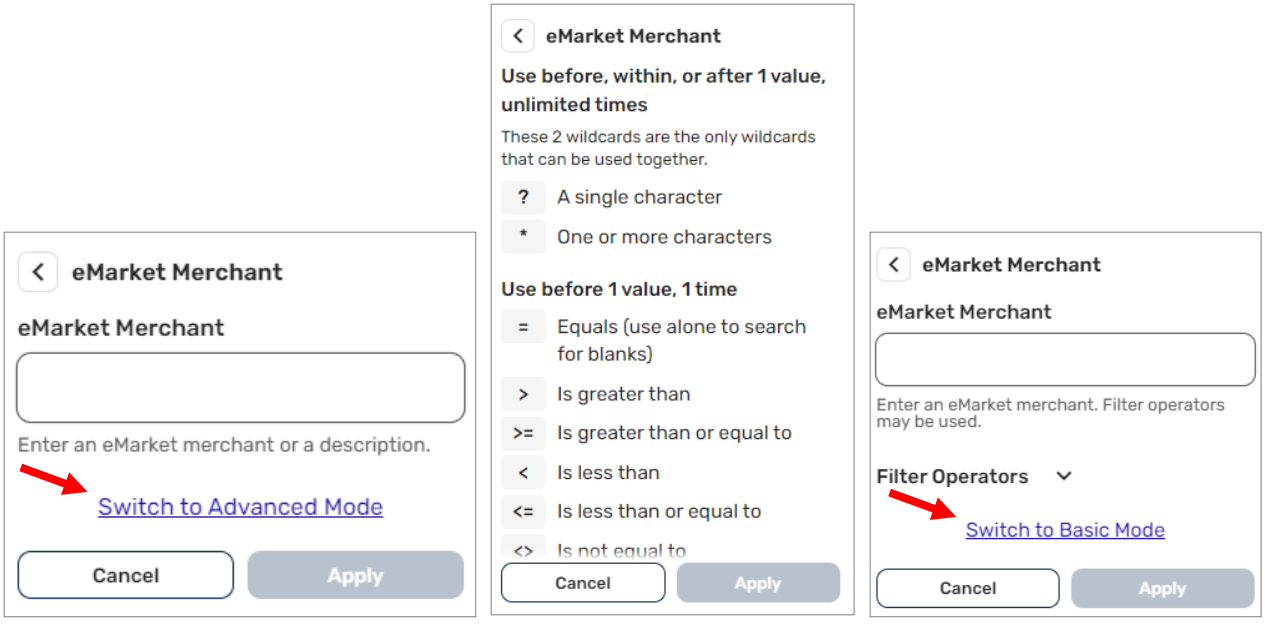

Figure 15 Switching Mode Links and Comparison Operators

When new filters are added, they appear in the ribbon. The selected filters are saved under "Operator Settings," so they will be automatically applied the next time the operator signs in. To remove a filter, click the **X**. To restore default settings, click the **Reset** link.

Note: There are no restrictions on the number of filters you can add; feel free to utilize all the available options.

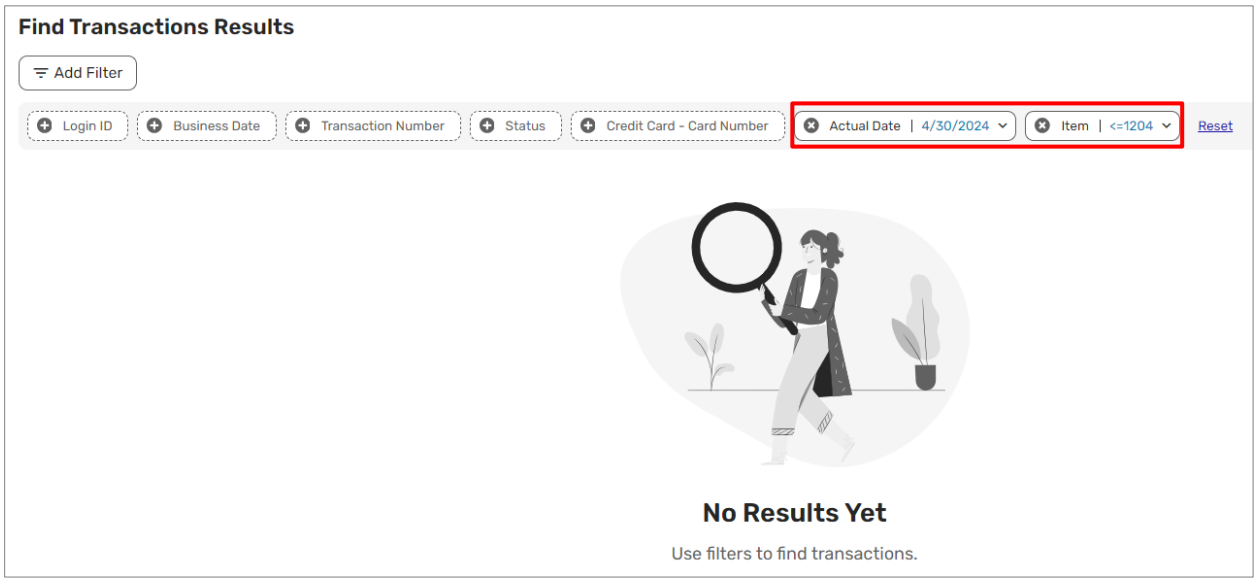

Figure 16 Added Filters

The following table outlines the available filters within the Find Transactions module.

Table 7 Customize Quick Filters

FILTER	DESCRIPTION
Customer	
Login ID	The ID assigned to the student.
Date	
Actual Date	The calendar date when the transaction physically occurred.
Business Date	The date the transaction was processed by the institution, rather than the calendar date or posting date.
Effective Date	The date the transaction was officially recorded or posted in the system.
Transactional	
Batch Number	Identifier for a group of transactions processed together.
Operator	The user or staff member who processed or initiated the transaction.
Payment Code	A system-defined code representing the payment method or category.
Receipt Email Address	The email address to which the transaction receipt was sent.
Status	Helps users narrow down records based on their current state.
Transaction Number	Allows users to search for and isolate specific transactions using their unique identifier.
Transaction Type	Classification of the transaction (e.g., purchase, refund, deposit).

FILTER	DESCRIPTION
Item Details	
Item	The specific product or service associated with the transaction.
Term	The academic/billing term linked to the transaction. i.e., Winter Session.
Product	
Deposit Number	A reference number for the deposit associated with the transaction.
Merchant	The specific merchant or storefront within eMarket where the transaction occurred.
Banking	
Amount	The total monetary value of the transaction.
Bank Account - Account Holder Name	The name of the individual or entity associated with the bank account.
Bank Account – Routing Number	The routing number used for ACH or bank transfer payments.
Bank Account – Account Number	The bank account number used in the transaction.
Bank Account – Check Number	The check number used if payment was made by check.
Credit Card – Credit Card Number	The credit card number used for the transaction (typically masked for security).
Payment Reference	A unique identifier or code provided by the payment processor.
Reference Type	
Reference Value	A customizable field used to store additional identifying information related to the transaction.

4 eRefund

The eRefund module is a solution that enables institutions to issue financial aid and other refunds electronically. eRefund supports two disbursement methods:

- **ACH Direct Deposit** — Funds are deposited directly into the student's bank account via Automated Clearing House (ACH) transfer, in accordance with NACHA specifications.
- **Paper Check** (add-on) — A supplemental module that issues physical checks to students who have not enrolled in direct deposit or do not have a bank account. Paper Check can help institutions meet Title IV disbursement requirements.

With ACH direct deposit, students self-enroll through the ePayment portal and enter their bank account information. The institution then generates a refund file containing student IDs and refund amounts and transmits it to Transact Payments. eRefund merges the file data with enrollment records to create a batch of pending refund transactions. An administrator must approve or void the batch before processing continues.

To learn more, refer to the *New Admin Experience eRefund User Guide*.

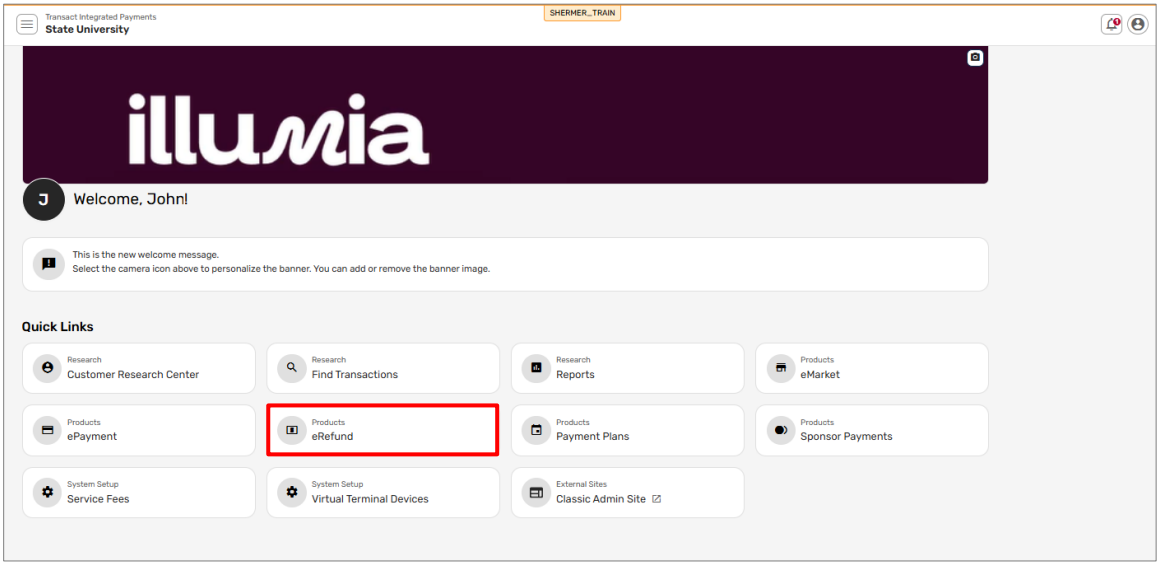

Figure 17 eRefund Tile

The **Suspended Enrollments** page displays a list of students whose eRefund enrollments have been suspended, along with the date, reason, and associated bank account for each record. Administrators can search the list by student name or ID and select individual or multiple records for bulk reactivation or withdrawal using the **Reactivate Selected** and **Withdraw** buttons at the top of the page.

Selecting a suspend reason link opens the **Suspend Reason Details** panel, which provides a full breakdown of the suspension including student information (name, ID, phone number, email address, and IP address), bank account details, and specific reason for suspension — such as a manual administrator action or a flagged account conflict. The panel also identifies the administrator who performed the suspension and includes a checkbox to select the record for a bulk action. Users can navigate between suspension records directly from the panel using the **Previous** and **Next** buttons.

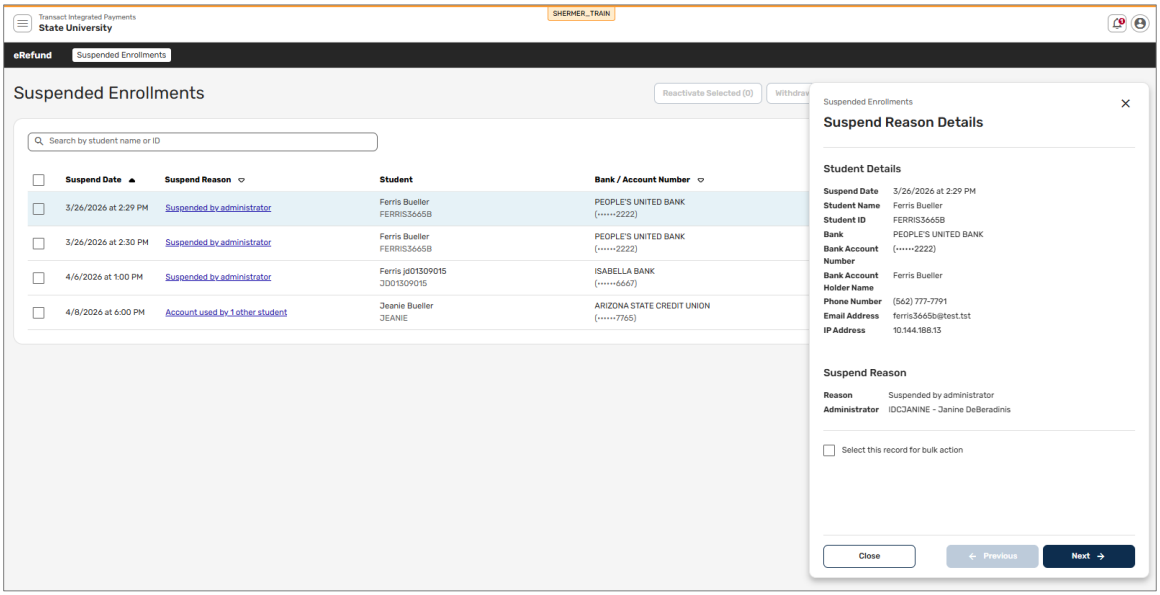

Figure 18 Suspended Enrollments Page

5 Reports

The Reports module provides a range of reports to help you access information and customize them to meet your specific requirements.

Reports included are:

- Auto Pay Reports
- eBill Reports
- Payment Plan Reports
- eRefund Reports
- Sponsor Payments Reports
- Transaction Related Reports

Note: Reports associated with specific modules (e.g., eBill, Payment Plan) will only be visible if the corresponding modules are licensed.

For additional details, refer to the *Payments Reports Quick Guide* available in the Support Library within Classic Admin

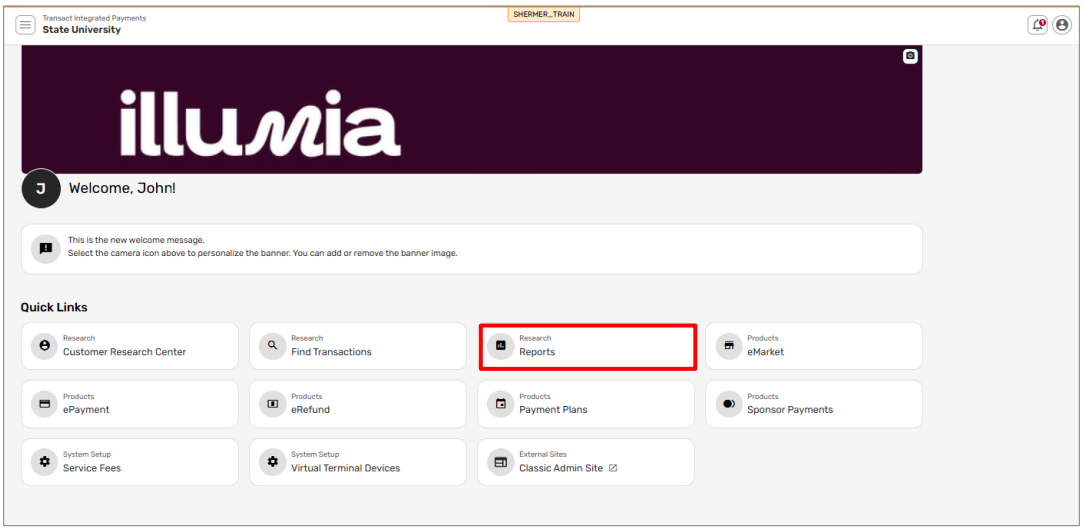

Figure 19 Reports Tile

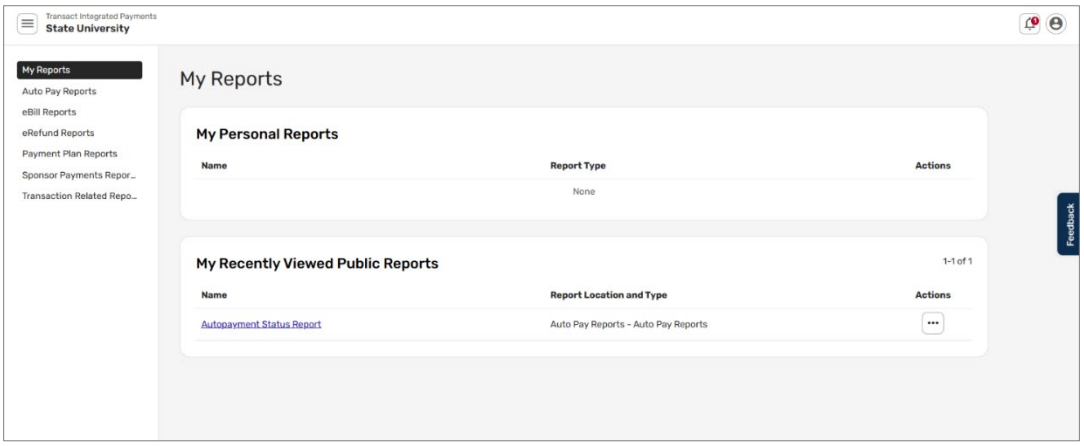

Figure 20 My Reports Page

5.1 My Reports

This page lists your Personal Reports and your recently viewed Public Reports. The system displays the last ten reports that the current operator has viewed.

With the appropriate permissions, you can view, customize, and delete a report.

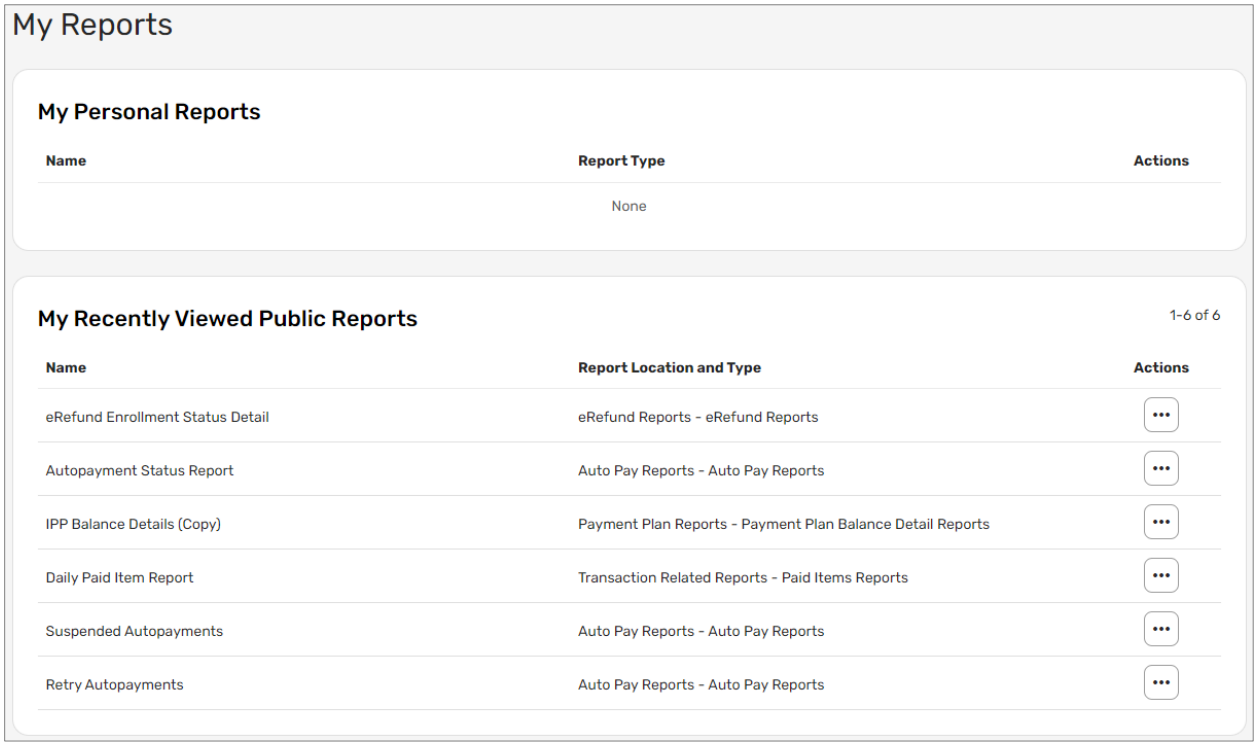

Figure 21 My Reports Page

Click the Actions button ··· to Customize, Delete, or View your report.

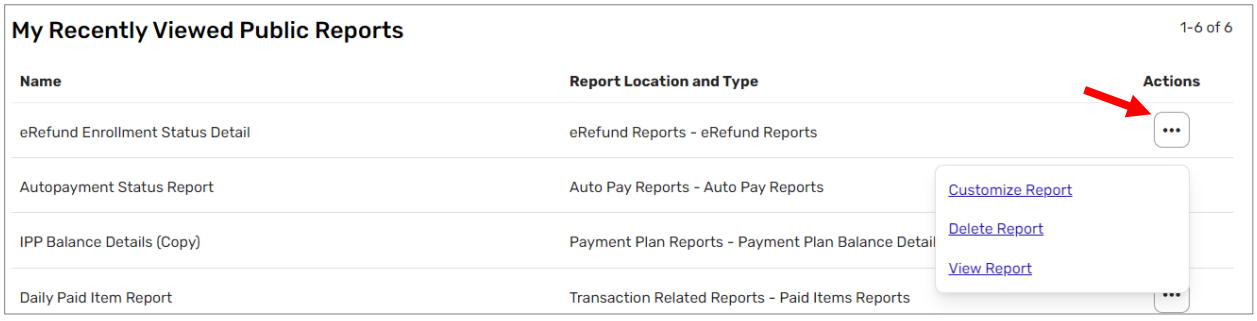

Figure 22 Actions Button and Options

6 eMarket

The eMarket module is a commerce solution designed to support non-tuition revenue through the creation and management of online ecommerce sites. It offers centralized tools for easy setup, user-configurable content and design, and simplified checkout experiences. It also integrates with third-party applications to accommodate specialized campus applications, providing a flexible and secure platform tailored to student and campus needs.

For additional details, refer to the *eMarket User Guide*, available in the Support Library within Classic Admin.

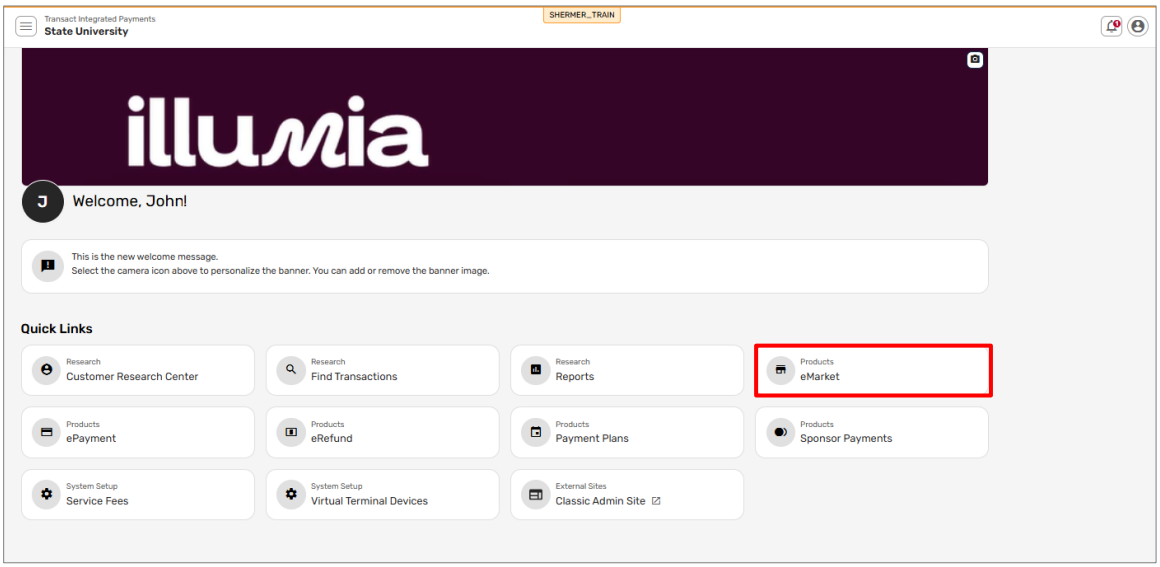

Figure 23 eMarket Tile

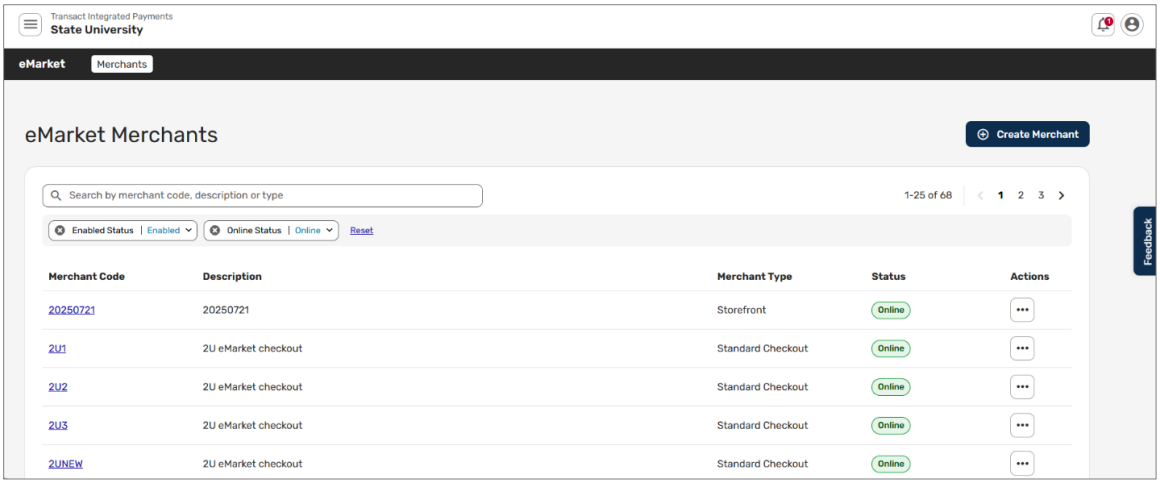

Figure 24 eMarket Merchants Page

7 ePayment

ePayment is an online portal that lets students pay tuition and fees easily and securely. It uses cloud-based tools to automate payments, improve security, and make the process simple and transparent for both students and staff. The ePayment module allows access to the ePayment site and offers the option to take the site offline. It includes a “View Site” button for quick access, which offers an “Emulate Customer” feature, displays a status indicator, and provides a direct URL for easy site navigation.

For additional details, refer to the *ePayment User Guide,* available in the Support Library within Classic Admin.

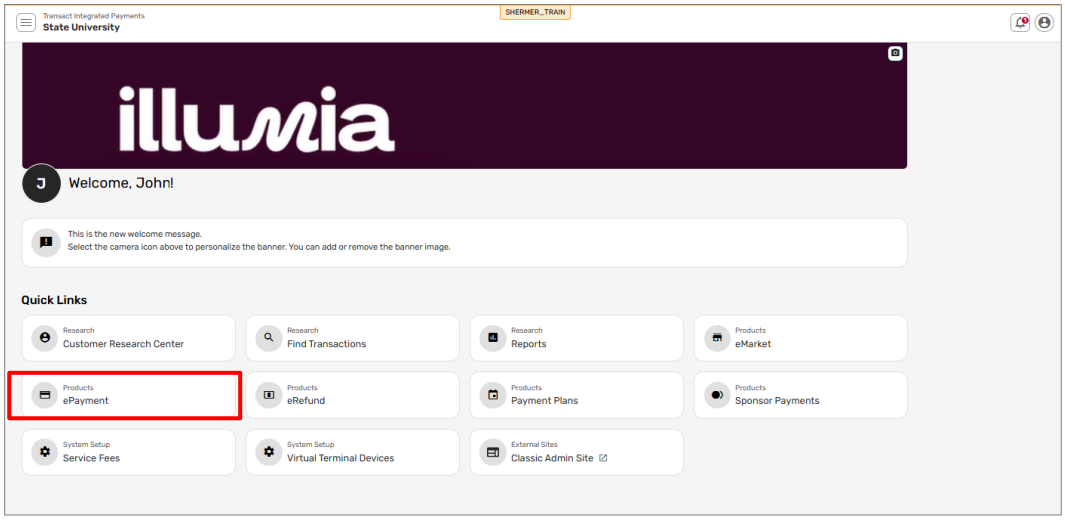

Figure 25 ePayment Tile

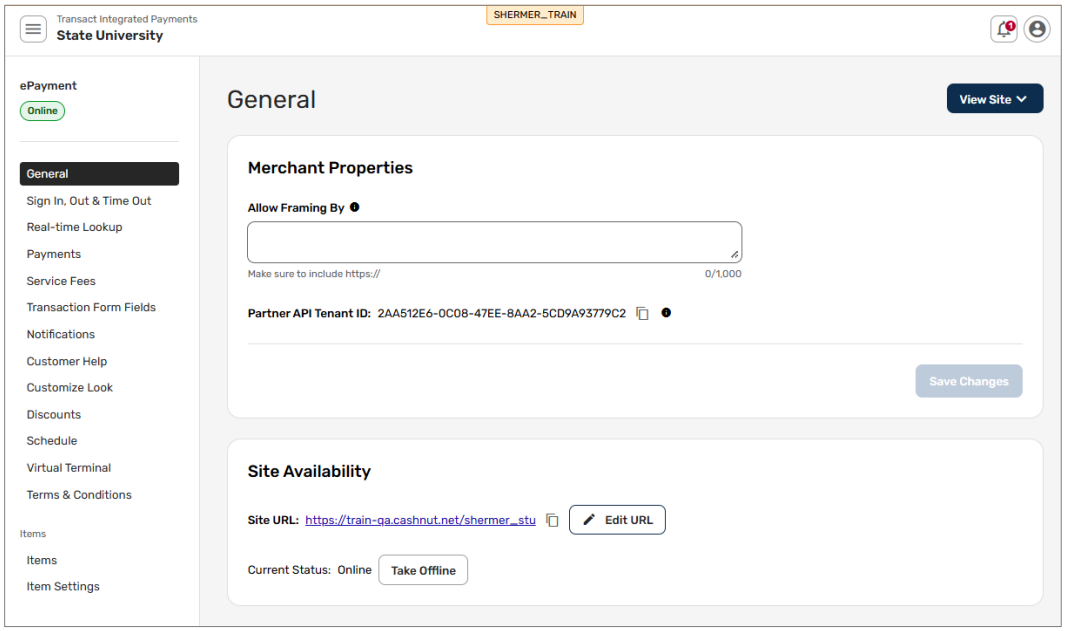

Figure 26 ePayment General Page

8 Payment Plans

The Payment Plans module offers flexible solutions to help students manage and pay their tuition. Institutions can choose between full-service and software-only options to meet administrative needs and student preferences.

The New Admin Experience now offers a more streamlined way to manage student payment. All essential functions previously available in Classic Admin—such as student enrollment, payment adjustments, and payment application have been refined to offer a more intuitive and efficient user experience.

For additional details, refer to the *Payment Plans Quick Guide* available in the Support Library within Classic Admin.

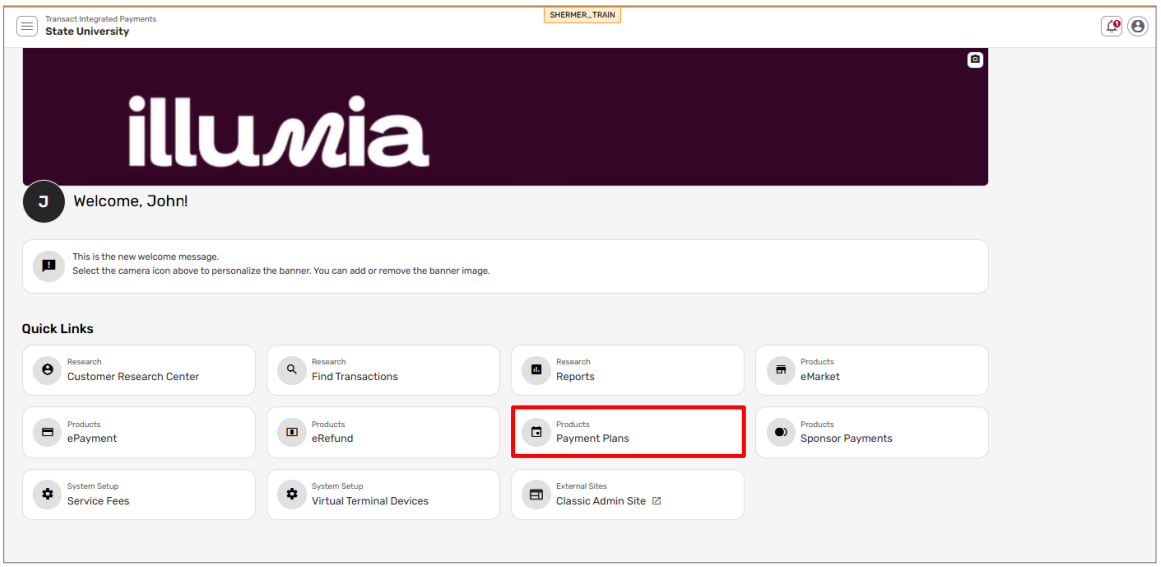

Figure 27 Payment Plans Tile

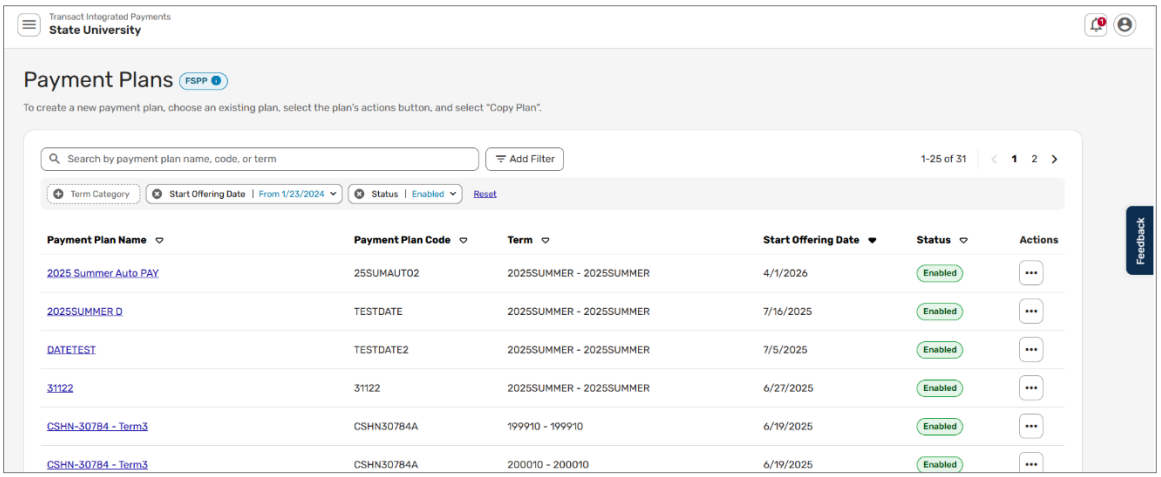

Figure 28 Payment Plans Page

9 Sponsor Payments

The Sponsor Payments module is a dual-access portal designed to streamline payment management for higher education finance offices. It enables staff to easily retrieve third-party balance data from their ERP system and invite sponsors to securely view and pay outstanding student invoices through the Sponsor Portal. When sponsors make electronic payments via ACH (Automated Clearing House) or credit card through the Sponsor Portal, the system automatically posts the transaction to the institution's ERP, complete with all relevant student, invoice, and sponsor details. Additionally, finance teams can manually record and post payments without requiring sponsors to use the secure portal.

For additional details, refer to the *Sponsor Payments User Guide for Campus Users* available in the Support Library within Classic Admin.

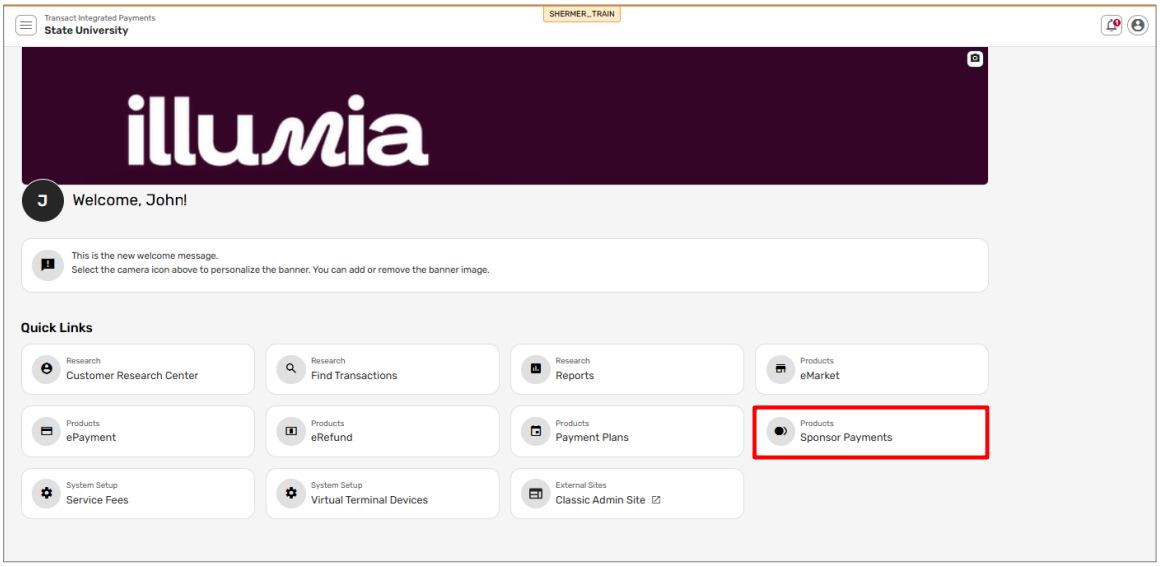

Figure 29 Sponsor Payments Tile

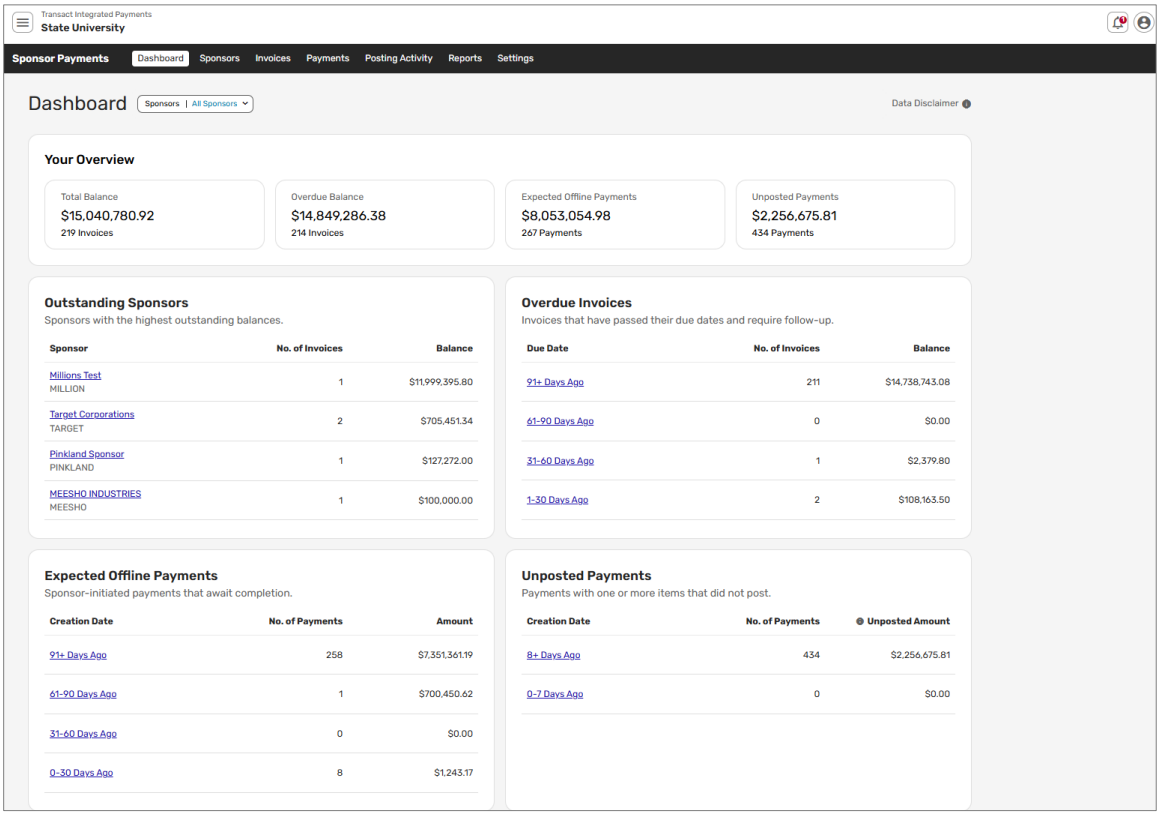

Figure 30 Sponsor Payments Dashboard

10 Virtual Terminal Devices

The Virtual Terminal Devices module provides centralized control for all the associated credit card devices.

- **Unified Device Administration** - Manage your entire fleet of virtual terminal devices from the New Admin Experience, with support for both existing and the latest device models.
- **Simplified Registration** - Register new devices and configure existing ones through a streamlined workflow designed for efficiency.

For additional details, refer to the *Virtual Terminal Devices Quick Guide* available in the Support Library within Classic Admin.

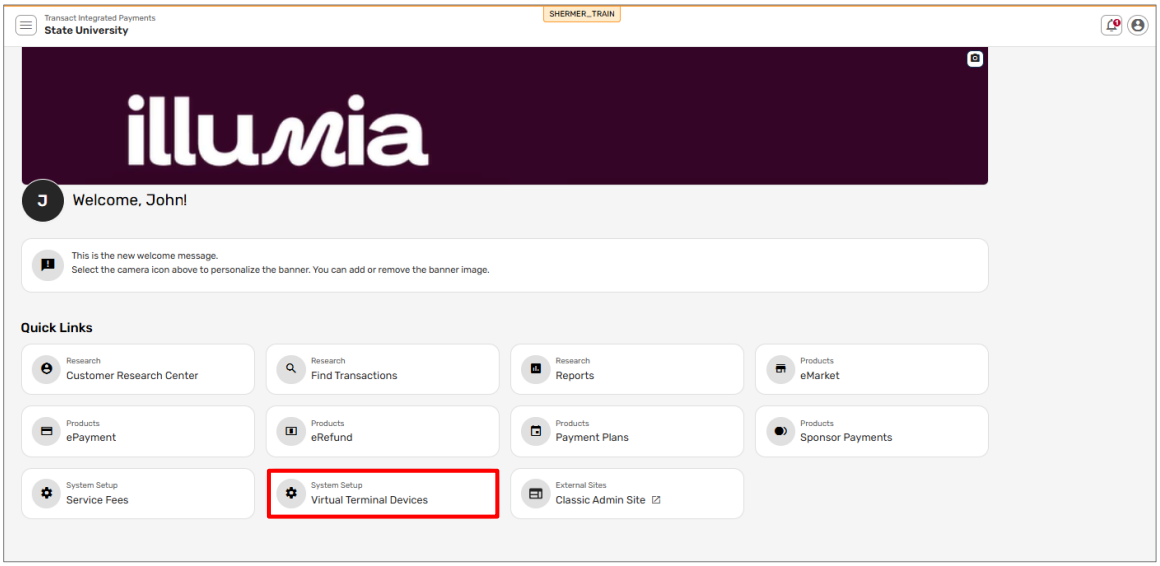

Figure 31 Virtual Terminal Devices Tile

11 Classic Admin Site

Classic Admin, our legacy system, is used to configure your Integrated Payments application. It also serves as the central hub for creating and managing user accounts and assigning permissions.

To access the site, click the **Classic Admin Site** tile. Once in, you will have access to all its features.

For additional details, refer to the *Classic Admin System Setup User Guide* available in the Support Library within Classic Admin.

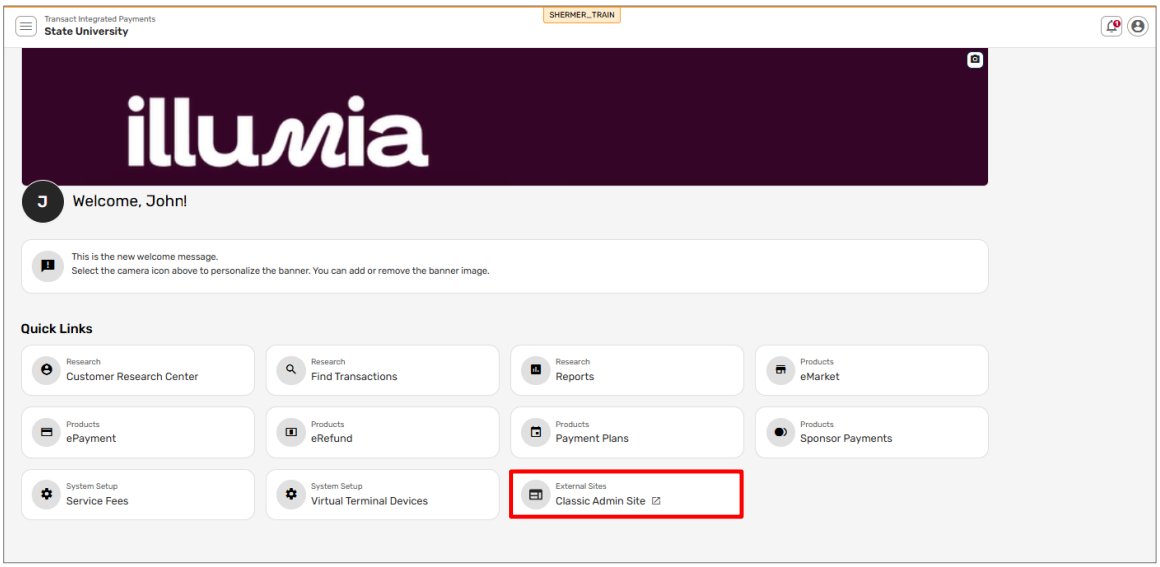

Figure 32 Classic Admin Site Tile

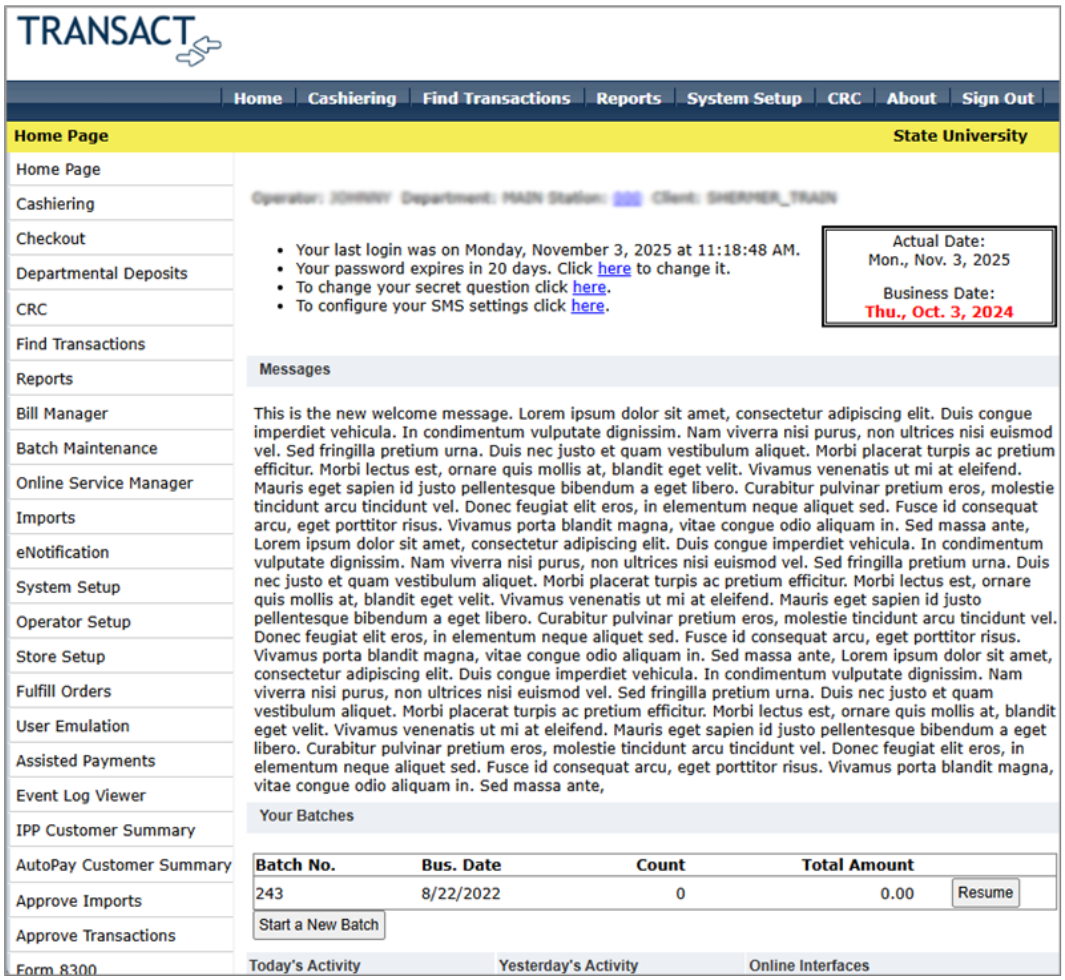

Figure 33 Classic Admin Page