New Admin Experience eMarket

User Guide

October 2026

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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.

About This Document

This guide walks you through setting up, managing, and using eMarket sites in the Integrated Payments – New Admin Experience. If you are on the Legacy interface, see the *eMarket User Guide* in the Support Library instead.

Scope

This document assumes you have already implemented Integrated Payments' eMarket module by configuring the required system setup tables, as described in the *System Setup User Manual*. Additional System Setup which may be required is detailed in this manual.

Note: Certain configuration sections are for reference only and must be performed by your Implementation Team.

Audience

This document is designed for campus staff who will set up, maintain, and utilize eMarket sites.

Glossary

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

Table 1: Document Glossary

TERM	DEFINITION
Cashier	An operator with cashiering privileges.
Customer	A student, non-student payer, or authorized user/parent.
Operator	Anyone with access to log in to Integrated Payments.
System Administrator	An operator with extended access to Integrated Payments, responsible for system setup and maintenance.

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1 eMarket Overview

Integrated Payments' eMarket module enables your institution to create any number of e-commerce sites to sell miscellaneous items, take donations, or accept payments for various services to unauthenticated (and potentially authenticated) customers. eMarkets are often integrated with a third-party vendor but can also be configured as store websites that allow customers to view, add items to their cart, and pay for goods and services.

1.1 eMarket Types

When creating an eMarket that will integrate with a vendor:

Depending on the eMarket vendor and their unique integration with Integrated Payments, one of three integration methods will apply: eMarket Rapid Checkout, eMarket Standard Checkout, and with a small number of vendors, an eMarket Gateway.

When creating an eMarket without a vendor integration:

Integrated Payments provides two eMarket integration methods: **Storefront** and **Checkout**. Each method offers distinct features and levels of complexity. Choosing the right approach depends on your institution's specific needs, the resources available, and the desired level of control over the payment process.

Table 2: eMarket Types Overview

	STOREFRONT	CHECKOUT
PCI Compliant Effort	Least	Moderate
Technical skills required to implement	Low	Moderate
Website the customer is on during the item selection process	Cashnet.com	Institution or vendor website
Website the customer is on during the payment data entry process	Cashnet.com	Cashnet.com
Level of control over website look and feel	Moderate. Can change colors, fonts, logos, and custom messages. Cannot change flow of the transaction.	Complete until the customer is transferred to the Integrated Payments website. Control over the Integrated Payments website is moderate. Can change colors, fonts, logos, and custom messages. Cannot change flow of the transaction. The customer never leaves the institution's website.
SmartPay/CampusPay Credit Card compatibility	Fully compatible	Fully compatible
SmartPay/CampusPay ACH compatibility	Not compatible	Compatible when an authenticated student is the payer.

1.2 eMarket Storefront

Overview

The Storefront method provides your institution with an effortless way to create web storefronts where customers can select and pay for items entirely on an Integrated Payments website, customized by your institution.

Using Storefronts gives individual departments the flexibility to manage their own operations. At the same time, the centralized system allows the institution to apply campus commerce policies quickly and consistently across all Storefronts.

All transaction data from Storefronts is securely stored in the central Payments database, ensuring a permanent audit trail for reconciliation, audits, and inquiries.

Key Benefits:

- Each department or entity can manage its own storefront independently.
- The institution retains centralized control, allowing for uniform policy updates across all storefronts.
- All transaction data is stored in the central Payments database, ensuring a permanent audit trail for reconciliation, internal audits, and reporting.

Customization:

Storefronts are customizable to reflect your institution's branding and preferences, making them both functional and visually aligned with your organization.

1.3 eMarket Checkout

Overview

With the Checkout method, customers browse your site or a vendor site, and once their purchase is determined, they are redirected to a Payments-hosted page to complete the payment.

The Checkout feature streamlines online transactions within the eMarket module. Students, staff, and authorized payers use it to securely complete purchases for campus-related goods and services. It supports PCI-compliant payment processing and integrates with digital wallets like Apple Pay™ and Google Pay™ for a mobile-friendly experience. Institutions can customize the checkout flow, and real-time confirmation enhances user confidence while reducing administrative overhead.

How It Works:

1. Your website sends customer and purchase details to Integrated Payments according to the integration requirements.
2. The customer lands on a secure Checkout page showing available payment options.
3. Integrated Payments guides the customer through:
    - Entering payment details
    - Confirming the transaction
    - Authorizing the payment

4. If successful:
    - The customer receives an on-screen and email receipt.
    - The customer is shown the reason for failure and can try a different payment method.
5. All transactions are logged in the Payments database for reporting and inquiry.

Post-Transaction Options:

Once the transaction is complete, your institution can receive confirmation through several methods:

- **Email Notification**: Payments sends a formatted email with transaction details to a designated address, which can be parsed by automated systems.
- **URL Callback**: Payments uses a specified URL to pass transaction details back to your website for further processing.
- **Reports**: Authorized staff can run reports in Word, Excel, or PDF formats.
- **Data Extracts**: Payments offers extract capabilities to post transaction data to other systems (note: this may incur additional costs).

Customization:

The Checkout page offers moderate customization, including custom messages, color, and font selection,

1.4 eMarket Licenses

All stores require the use of an eMarket license. Licenses come in two varieties, **single** and **unlimited**.

Your institution can start with a single license for individual eMarket stores. Each individual license includes a batch extract.

Once you reach six eMarket stores, you will want to consider an Unlimited eMarket license for cost savings. With an unlimited license, you have the freedom to create as many eMarket stores as desired, and you receive one batch extract for each store. Contact your Client Manager or Sales Account Executive for more information on purchasing eMarket licenses.

1.5 Setup Overview

Creating an eMarket store consists of two main steps—configuring the back-end framework and configuring the front-end of the store. In certain cases, you may wish to have your Payments System Administrator perform the System Setup steps and a dedicated eMarket Administrator complete the front-end.

1.6 Merchant

A merchant is the institution or entity that receives payments for services such as tuition, fees, housing, or other campus-related charges. Merchants are configured within the system to securely process transactions, manage payment settings, and access reporting tools. Each merchant setup defines accepted payment methods, fee structures, and financial system integrations to ensure accurate and efficient handling of payments.

Merchants are set up on the back end of the eMarket and should not be confused with a credit card merchant.

The purpose of Merchant setup is to:

- Create a unique identifier for your eMarket.
- Define the type of eMarket (Storefront, Standard Checkout, or Rapid Checkout).
- Assign banking to an eMarket (i.e., credit card terminal)
- Set the URL to access the eMarket.
- Define an email sender for payment confirmation emails

The Merchant must be created and configured before an eMarket can be set up.

1.7 Default Merchant

Administrators can configure default merchant settings to standardize new eMarket stores across your institution. Default merchant settings allow you to:

- Apply a shared payment code to new stores instead of generating a unique one, keeping reporting and extract logic consistent across stores.
- Lock store appearance settings, such as colors, to prevent store owners from overriding them and maintain a uniform look across your institution.
- Prefix new item codes with the merchant code to match institutional naming conventions, eliminating the need for manual entry.

Please refer to: Configuring Default Merchant Settings (p. 15).

2 Creating a Merchant

Follow the steps in this section when creating or making changes to an existing merchant.

To create a merchant:

1. Log in to the New Admin Experience and select the **eMarket** tile.

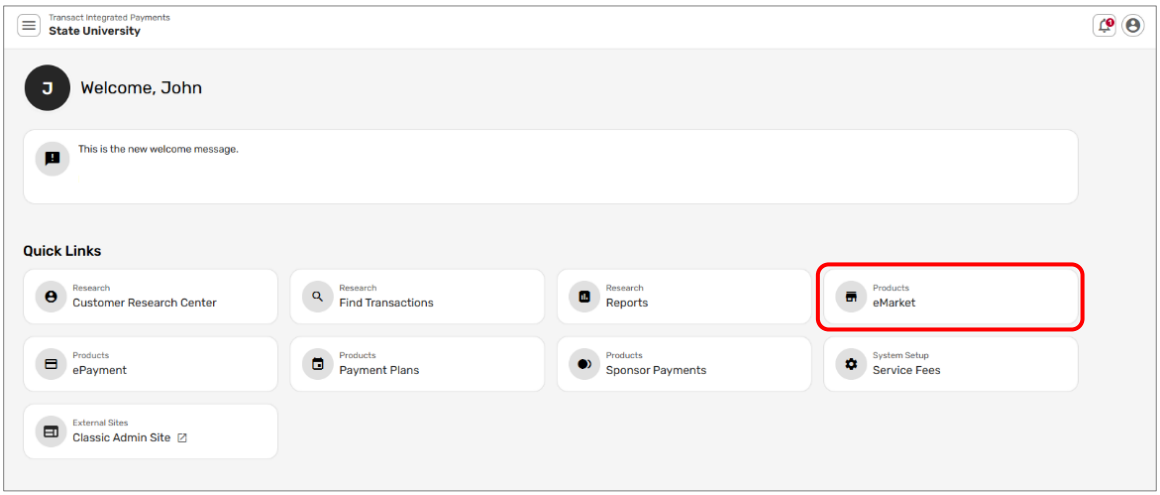


Figure 1 New Admin Experience Landing Page

2. In the eMarket Merchants page, click **Create Merchant**.

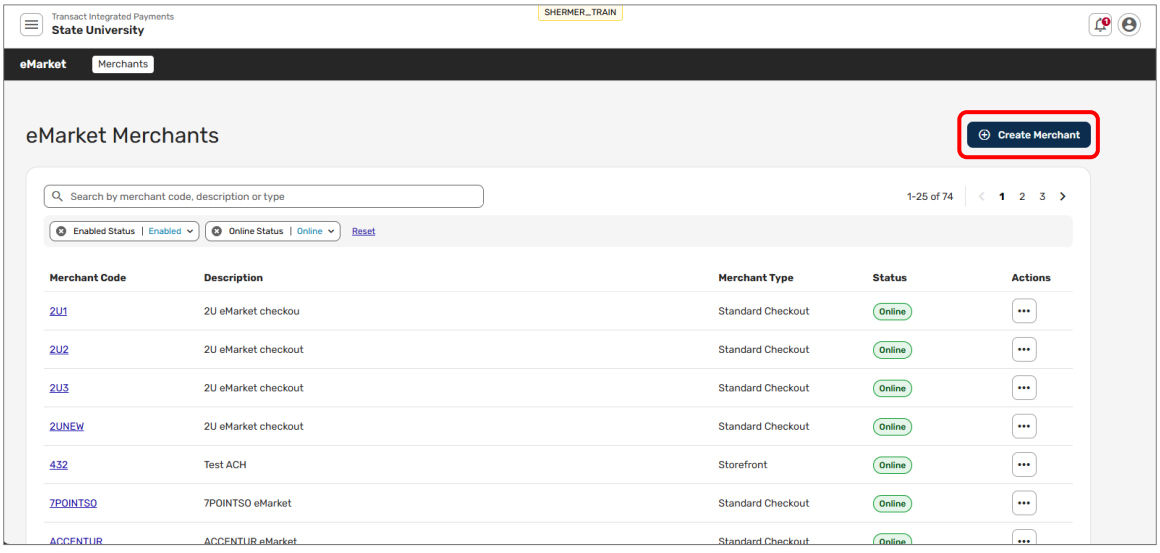


Figure 2 Create Merchant Button

3. Choose whether you are integrating with a supported third-party vendor.

2.1.1 Integrating with a Supported Third-Party Vendor

1. When integrating with a supported third-party vendor, select **Yes**.

   Note: This means that your institution is connecting the Integrated Payments system with an external service provider that has been officially approved or certified to work with the Payments platform.

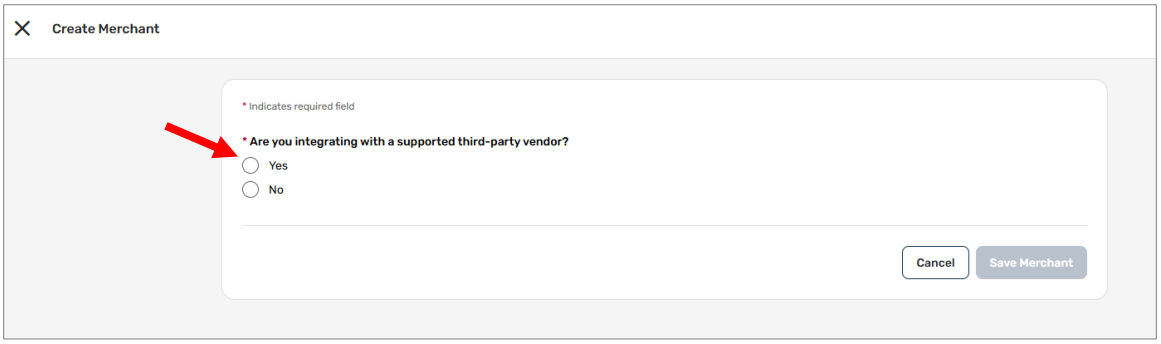


Figure 3 Integration Options

   a) If you select **Yes**, continue to step 2.

   b) If you selected **No**, skip to Not integrating with a supported third-party vendor (p. 12).

2. Once you have selected **Yes**, click inside the "eMarket Vendor" field to select the vendor with whom you are working.

   Note: If your vendor is not on the list, we have not added them yet. You can still create a merchant without a vendor.

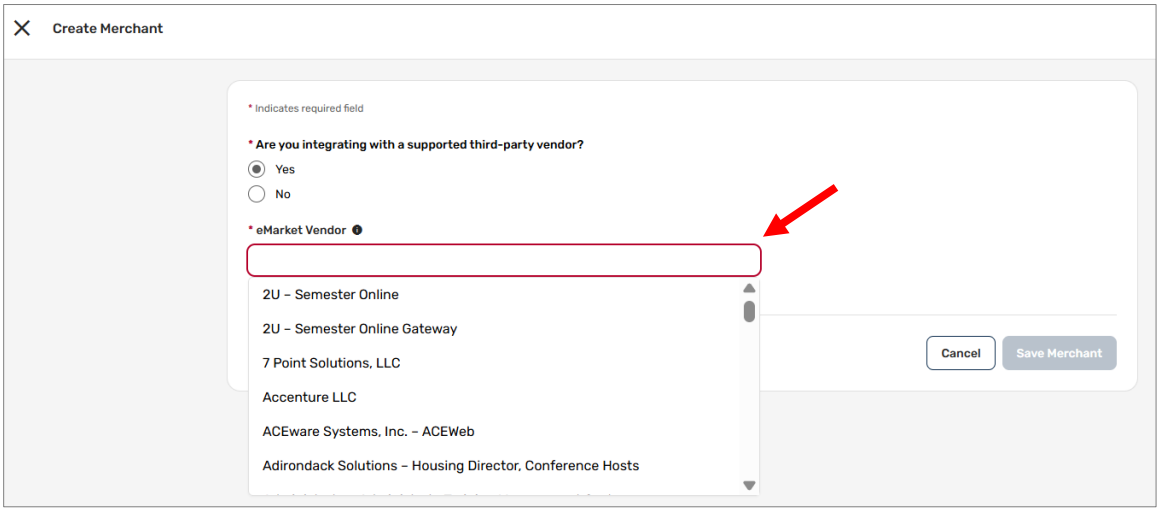


Figure 4 List of Available Vendors

- If using an eMarket Checkout vendor, select the type of checkout. This determines the payment experience and integration capabilities. If not using an eMarket Checkout vendor, skip to step 7.
- Next you will select from the **Rapid** or **Standard** Checkout Options. For information on how the applicable vendor integrates with Integrated Payments, please see the *eMarket Integration Vendor List* in the Support Library.

- **Rapid Checkout** – Newer and simpler customer payment acceptance. Websites may either redirect from/to a hosted checkout, embed the checkout, or use Rapid Checkout APIs as a gateway. Payment devices that support P2PE (Point to Point Encryption) may also use Rapid Checkout as a gateway.
- **Standard Checkout** – Hosted multiple step customer payment acceptance that allows for redirection from and to your web site.

  Note: A blue license availability badge is displayed next to each checkout type, indicating the number of licenses currently available. If more licenses are needed, please contact your Client Manager.

3. Refer to the following table to complete your setup.

Table 3 Merchant Setup Fields

FIELD	DATA ENTRY INSTRUCTIONS
Merchant Description	Enter a descriptive name of the merchant. This is only visible to operators when accessing Virtual Terminal to view a merchant with no Merchant Name configured within Store Setup. (Maximum 50 characters)
Merchant Code	Enter a unique merchant code for this eMarket. The Merchant Code is used as a prefix for any items created from within the store. (Maximum 10 characters, no spaces allowed)
eCommerce Credit Card Terminal	Select the credit card terminal to be used with this store.
Email Sender Address	Enter the email address that should be used to send email notifications for this merchant.
Set up item default values for extracts, attributes, or G/L code	Setting default values can be used to facilitate creation of new items in this merchant. Any fields defined here will appear when creating a new item.
Extracts	
Choose Where to Extract Items	Check the checkbox next to the appropriate extract(s) to indicate that this item code should be included in the extract. If applicable, also select whether to extract this item in summary or detail. If a transaction includes an item that does not have an extract selected, it will not extract. Selecting an option will not retroactively update prior transactions.
Attributes	
Attribute 1 – 4	You have the ability to define custom attribute values that may contain additional information based on your institution's needs. These fields are most commonly used for storing information that would otherwise need to be entered each time the item is used or need to be referenced when extracting the item. (Maximum 50 characters per entry)
General Ledger	
G/L Code	A G/L Code (General Ledger Code) is A unique identifier used to categorize and track financial transactions within an accounting system.

FIELD	DATA ENTRY INSTRUCTIONS
(Omit G/L)	This feature allows users to exclude specific General Ledger codes from being applied to a transaction. This is useful for preventing automatic ledger entries, simplifying reconciliation, and ensuring that only relevant financial data is recorded. (Must contain at least 6 characters | Maximum 6 characters allowed)
Allow changes to G/L code.	This field only applies when using the Integrated Payments Cashiering module. Check this checkbox if the cashier may change the general ledger code for this item code during a transaction. If this item code is meant to be a miscellaneous item code that encompasses a variety of activities, this option is suggested so that operators are allowed to enter the proper account number.

4. Click **Save Merchant**.

2.1.2 Not integrating with a supported third-party vendor

1. If you are not integrating with a supported third-party vendor, select **No** and choose one of the following:
   - **Storefront** – Hosted store web site allows customers to view, add items to cart, and pay for goods or services. This may be operated as a standalone web site with items that can be visually organized into categories.
   - **Checkout** – Handles payment acceptance for completing a pre-existing store or purchase experience. Web sites may either redirect from/to a hosted checkout, embed Rapid Checkout, or use Rapid Checkout APIs as a gateway. Payment devices with P2PE may also use Rapid Checkout as a gateway.

     Note: A blue license availability badge is displayed next to each checkout type, indicating the number of licenses currently available. If more licenses are needed, please contact your Client Manager.

2.1.2.1 Storefront Setup

1. Select **Storefront**.
2. Refer to the following table to complete your setup.

Table 4 Storefront Setup Fields

FIELD	DATA ENTRY INSTRUCTIONS
Merchant Description	Enter a descriptive name of the merchant. This is only visible to operators when accessing Virtual Terminal to view a merchant with no Merchant Name configured within Store Setup. (Maximum 50 characters)
Merchant Code	Enter a unique merchant code for this eMarket. The Merchant Code is used as a prefix for any items created from within the store. (Maximum 10 characters, no spaces allowed)
eCommerce Credit Card Terminal	Select the credit card terminal to be used with this store.
Email Sender Address	Enter the email address that should be used to send email notifications for this merchant.

FIELD	DATA ENTRY INSTRUCTIONS
Extracts	
Choose Where to Extract Items	Check the checkbox next to the appropriate extract(s) to indicate that this item code should be included in the extract. If applicable, also select whether to extract this item in summary or detail. If a transaction includes an item that does not have an extract selected, it will not extract. Selecting an option will not retroactively update prior transactions.
Attributes	
Attribute 1 – 4	You have the ability to define custom attribute values that may contain additional information based on your institution's needs. These fields are most commonly used for storing information that would otherwise need to be entered each time the item is used or need to be referenced when extracting the item. (Maximum 50 characters per entry)
General Ledger	
G/L Code	A G/L Code (General Ledger Code) is A unique identifier used to categorize and track financial transactions within an accounting system.
(Omit G/L)	This feature allows users to exclude specific General Ledger codes from being applied to a transaction. This is useful for preventing automatic ledger entries, simplifying reconciliation, and ensuring that only relevant financial data is recorded. (Must contain at least 6 characters | Maximum 6 characters allowed)
Allow changes to G/L code.	This field only applies when using the Integrated Payments Cashiering module. Check this checkbox if the cashier may change the general ledger code for this item code during a transaction. If this item code is meant to be a miscellaneous item code that encompasses a variety of activities, this option is suggested so that operators are allowed to enter the proper account number.

3. Click **Save Merchant**.

2.1.2.2 Checkout Setup

1. Select **Checkout**.
2. Select the type of checkout. This determines the payment experience and integration capabilities.
   - **Rapid Checkout** – Newer and simpler customer payment acceptance. Web sites may either redirect from/to a hosted checkout, embed the checkout, or use Rapid Checkout APIs as a gateway. Payment devices that support P2PE (Point to Point Encryption) may also use Rapid Checkout as a gateway.
   - **Standard Checkout** – Hosted multiple step customer payment acceptance that allows for redirection from and to your web site.

     Note: A blue license availability badge is displayed next to each checkout type, indicating the number of licenses currently available. If more licenses are needed, please contact your Client Manager.
3. Refer to the following table to complete your setup.

Table 5 Merchant Setup Fields

FIELD	DATA ENTRY INSTRUCTIONS
Merchant Description	Enter a descriptive name of the merchant. This is only visible to operators when accessing Virtual Terminal to view a merchant with no Merchant Name configured within Store Setup. (Maximum 50 characters)
Merchant Code	Enter a unique merchant code for this eMarket. The Merchant Code is used as a prefix for any items created from within the store. (Maximum 10 characters, no spaces allowed)
eCommerce Credit Card Terminal	Select the credit card terminal to be used with this store.
Email Sender Address	Enter the email address that should be used to send email notifications for this merchant.
Set up item default values for extracts, attributes, or G/L code	Setting default values can be used to facilitate creation of new items in this merchant. Any fields defined here will appear when creating a new item.
Extracts	
Choose Where to Extract Items	Check the checkbox next to the appropriate extract(s) to indicate that this item code should be included in the extract. If applicable, also select whether to extract this item in summary or detail. If a transaction includes an item that does not have an extract selected, it will not extract. Selecting an option will not retroactively update prior transactions.
Attributes	
Attribute 1 – 4	You have the ability to define custom attribute values that may contain additional information based on your institution's needs. These fields are most commonly used for storing information that would otherwise need to be entered each time the item is used or need to be referenced when extracting the item. (Maximum 50 characters per entry)
General Ledger	
G/L Code	A G/L Code (General Ledger Code) is A unique identifier used to categorize and track financial transactions within an accounting system.
(Omit G/L)	This feature allows users to exclude specific General Ledger codes from being applied to a transaction. This is useful for preventing automatic ledger entries, simplifying reconciliation, and ensuring that only relevant financial data is recorded. (Must contain at least 6 characters | Maximum 6 characters allowed)
Allow changes to G/L code.	This field only applies when using the Integrated Payments Cashiering module. Check this checkbox if the cashier may change the general ledger code for this item code during a transaction. If this item code is meant to be a miscellaneous item code that encompasses a variety of activities, this option is suggested so that operators are allowed to enter the proper account number.

4. Click **Save Merchant**.

3 Configuring Default Merchant Settings

Administrators can configure default merchant settings to standardize new eMarket stores across your institution. These settings allow you to apply a shared payment code to new stores for consistent reporting and extract logic, lock store appearance settings such as colors to maintain a uniform look, and prefix new item codes with the merchant code to match institutional naming conventions.

To configure default merchant settings:

1. In eMarket, click **View Default Merchant**.

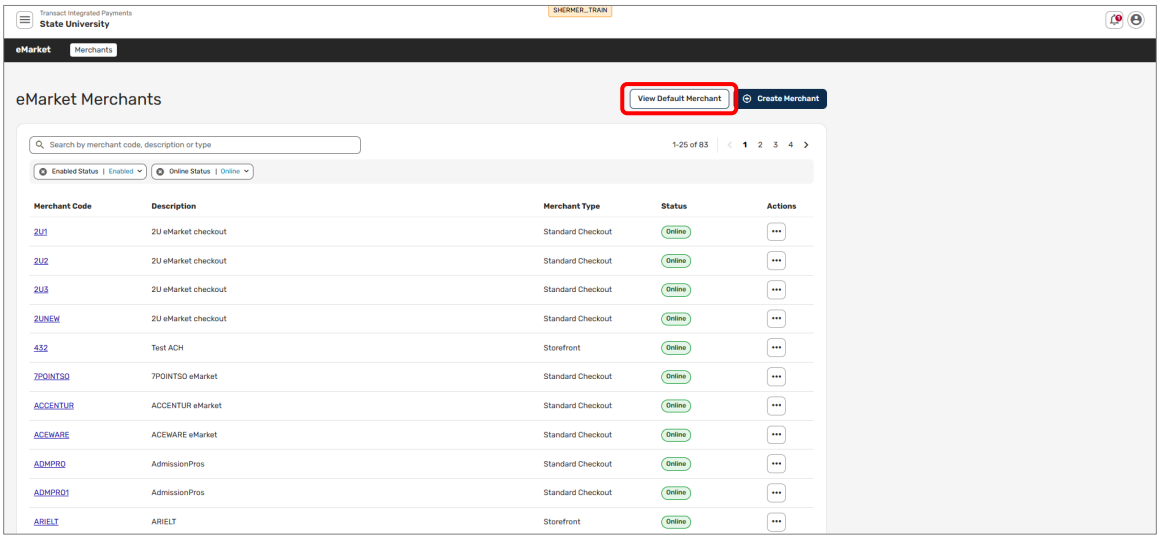


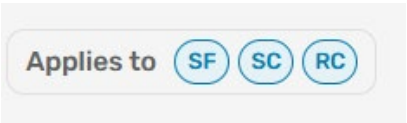
Figure 1 View Default Merchant Button

3.1 Default eMarket Merchant General Settings

What you can do on this page:

- **Select** the default customer that will be used for transactions through newly created merchants.
- **Create** new customers.

The “Applies to” indicator shows which modules the settings on the page or section apply to.
For example, SF = **Store Front**, SC = **Standard Checkout**, RC = **Rapid Checkout**.



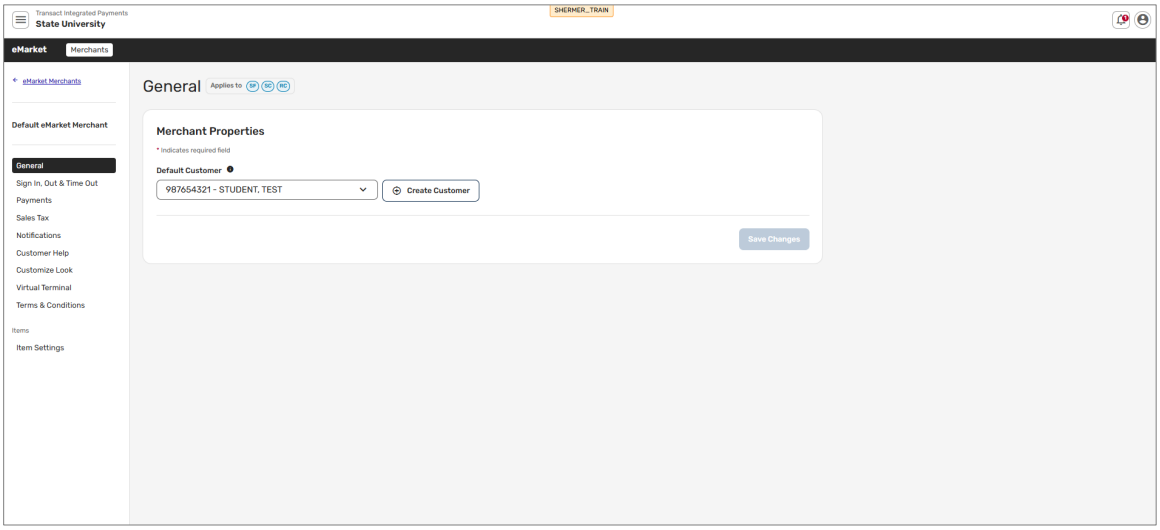


Figure 2 Default Merchant General Settings

3.1.1.1 Selecting a Default Customer

In this section you will select the default custom that will be used for transactions through newly created merchants.

To select a default customer:

1. Select the down arrow in the **Default Customer** list.
2. Select a customer from the list or type the customer's name. Results appear as you type.

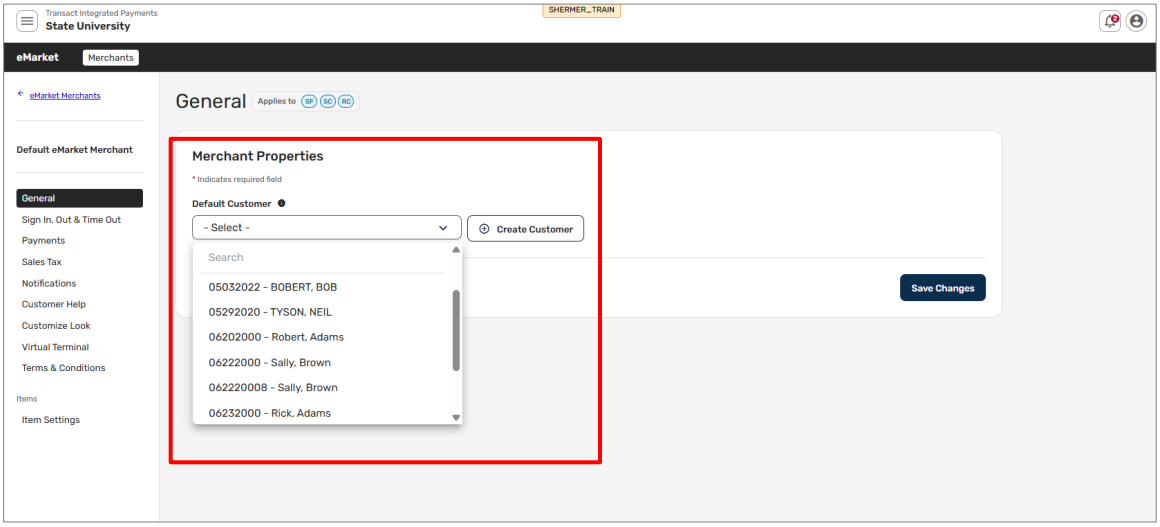


Figure 3 Default Customer List

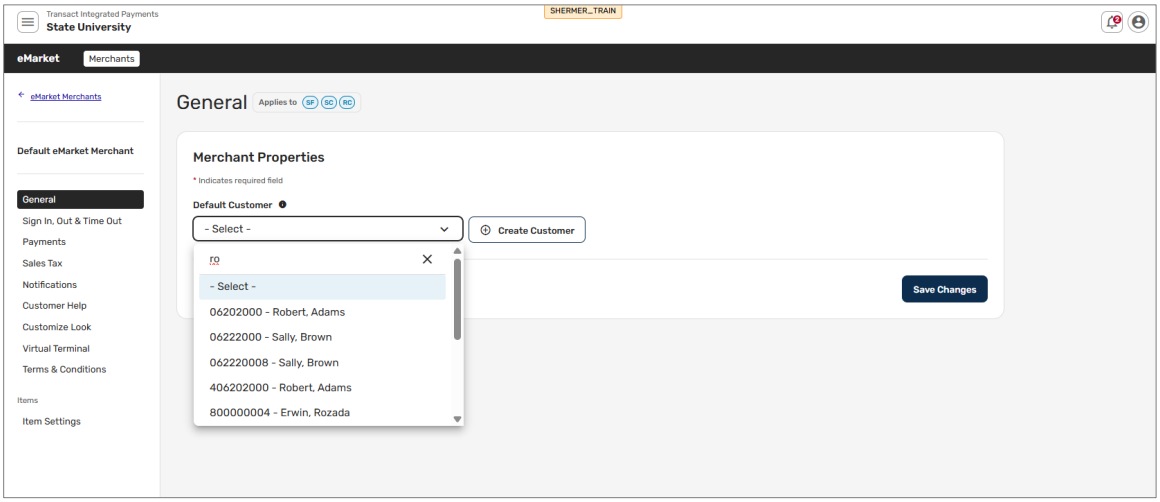


Figure 4 Default Customer Search Results

3. Click **Save Changes**.

3.1.1.2 Creating a Customer (Default Merchant)

Administrators can create customers directly from the eMarket module. If you wish to create a new customer, follow the steps below.

To create a new customer:

1. In the “Merchant Properties” section, click **Create Customer**.

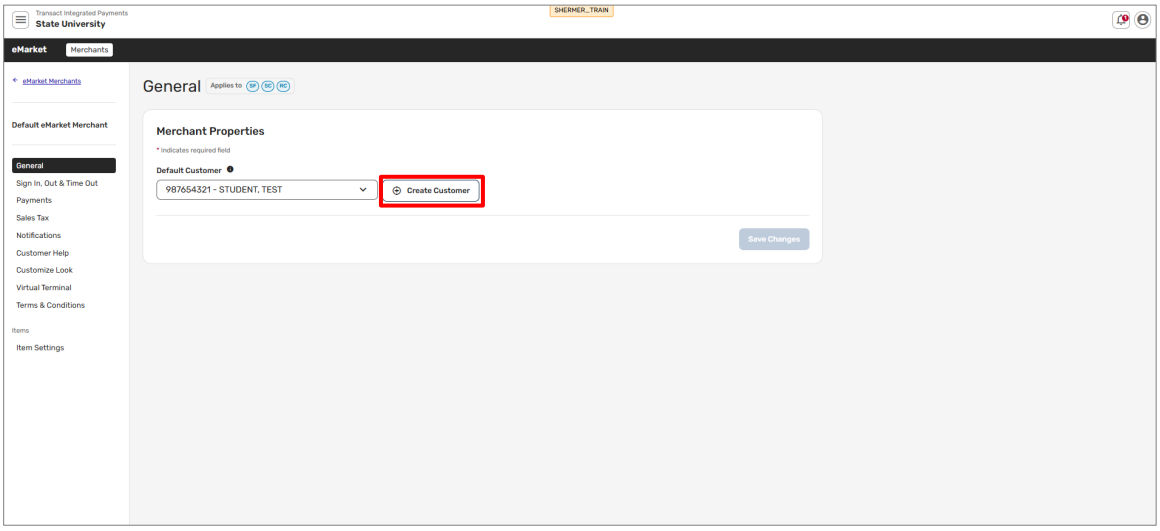


Figure 5 Create Customer Option

2. Refer to the following table to complete the **General Information** section.

Table 3 Customer General Information

FIELD	DATA ENTRY INSTRUCTIONS
General Information	
Student ID	Enter an ID for this customer. eMarket uses this ID to uniquely identify the customer in the system, ensuring accurate tracking of transactions, account balances, and order history. (Maximum 150 characters)
First Name	Enter the customer's first name. (Maximum 20 characters)
Last Name	Enter the customer's last name. (Maximum 30 characters)
Email Address	Enter the email address for this customer. (Maximum 70 characters)
Phone Number	Enter a phone number for this customer.
Date of Birth	Select the customer's date of birth using the calendar icon or enter it manually. (Format MM/DD/YYYY)
Customer Group Code	Select the group code to assign to this customer. Customer group codes are used to categorize customers and control access to pricing, products, and other settings within eMarket.
Shared Secret Prompt	Enter a shared secret associated with the customer. The shared secret is used to verify the identity of the user during the authentication process. (Maximum 50 characters)
Customer Attributes	
CA Prompt 1 - 4	These prompts define how the attribute fields are labeled when presented to the customer. (Maximum 50 characters)
Address	
Address Line 1 – 3	Enter the customer's street address, such as the street number and street name. If applicable, use Address Line 2 and Address Line 3 to enter additional address information, such as an apartment, suite, or unit number. (Maximum 50 characters per field)
City	Enter the city name. (Maximum 30 characters)
State Abbreviation	Enter the state abbreviation. i.e., AZ, CA. (Maximum 2 characters)
Zip/Postal Code	Enter the zip code or postal code. (Maximum 10 characters)
Country	Enter the country name. (Maximum 30 characters)

3. Click **Save Customer**.

For information about configuring the remaining default merchant settings, refer to the following chapter, starting with the Sign In, Out & Time Out (p.22)

4 Configuring Your eMarket Settings

This chapter walks you through configuring the settings for your eMarket Storefront or Checkout merchant. Beginning from the eMarket Merchants landing page, you access a merchant's details page and use the left navigation pane to move through each configuration area including general properties, payment options, notifications, discounts, scheduling, and items. Instructions are organized in the order the navigation links appear. Where settings differ between Storefront and Checkout, fields are labeled accordingly throughout the tables.

To configure your eMarket settings:

1. On the eMarket Merchants landing page, either click the Merchant Code link or select the Actions button ••• for the merchant you want to configure, and then select **View Details**.

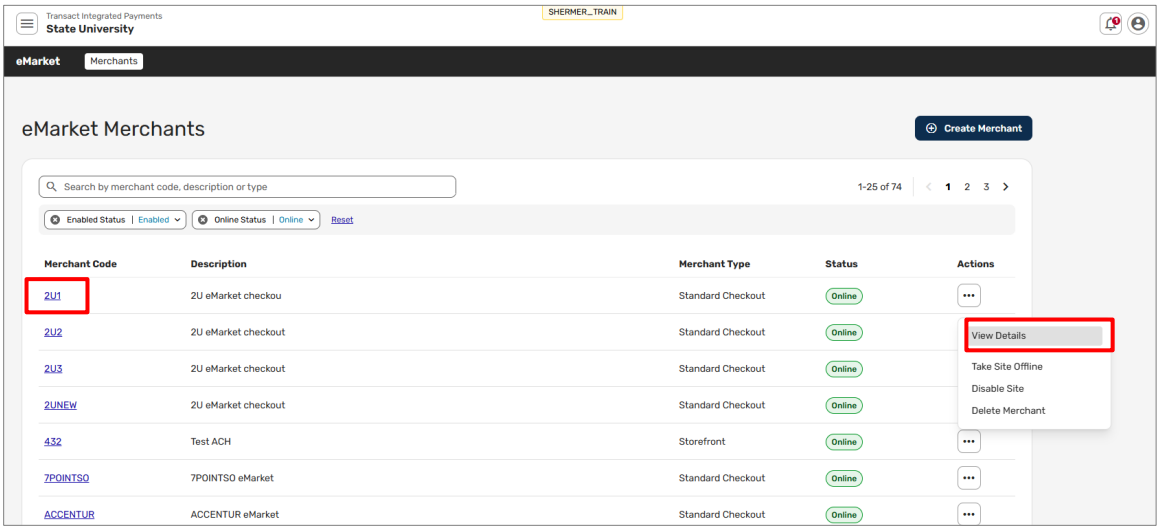


Figure 5 eMarket Merchants List

2. The merchant's details page opens with the **General** page displayed by default.

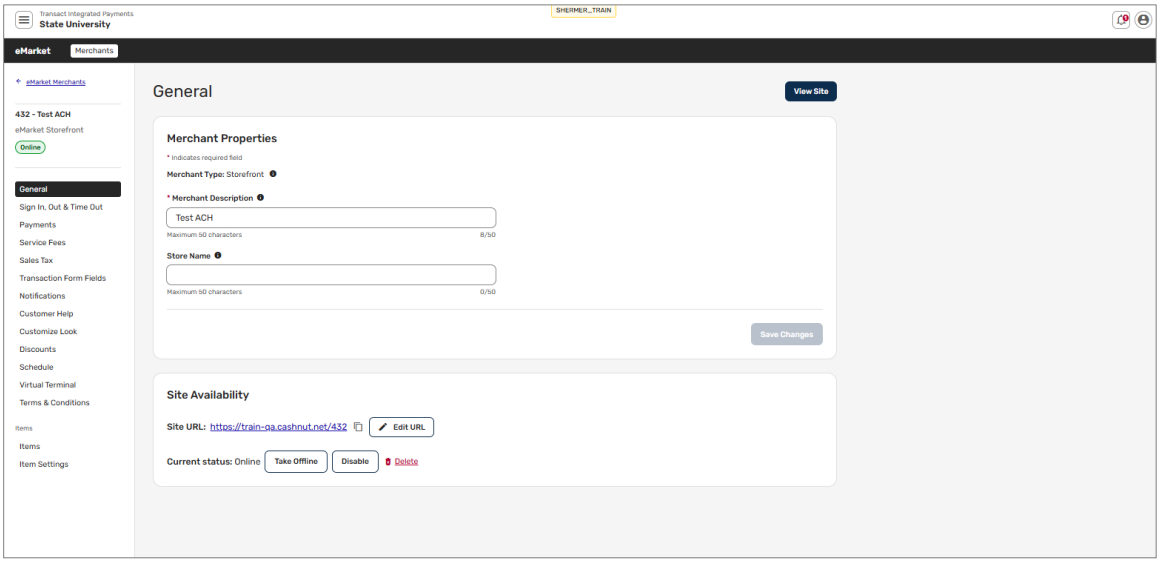


Figure 6 General Page

3. Select a link from the left navigation pane to configure its settings. The following instructions are organized in order that the navigation links appear in the left navigation pane.

   Note: Please note that where settings differ between Storefront and Checkout, fields are labeled accordingly throughout the tables.

4.1 General

What you can do on this page:

- **Configure** the Merchant Description and Store Name.
- **Edit and share** the site's URL.
- **Control** the site's availability.

4.1.1 Merchant Properties

This section determines the features available to the merchant and its customers.

Table 6 Merchant Properties Fields

FIELD	DATA ENTRY INSTRUCTIONS
Merchant Description	Descriptive name of the merchant. This is only visible to operators when accessing Virtual Terminal to view a merchant with no Merchant Name configured within Store Setup. (Maximum 50 characters)
Store Name	This equals the Store Setup 'Merchant Name' field. If populated, this appears on the landing 'Shop' page below the store banner. It doesn't appear anywhere in an eMarket Checkout or ePayment. (Maximum 50 characters)

4.1.2 Site Availability

This section provides the link to your site and includes options to enable or disable its visibility, and a button to delete the site if needed.



Figure 7 Site Availability Section

Table 4 Site Availability Field Descriptions

FIELD	DESCRIPTION
Take Offline	This button is a control used to temporarily disable public access to a website. When clicked, it makes the site inaccessible to visitors. However, administrators or editors may still be able to access the backend for updates or troubleshooting.
Disable	This button deactivates the site entirely, preventing both public users from accessing it. Unlike "Take Offline," which may allow backend access for editing or maintenance, "Disable" is a more permanent or restrictive action.
Delete	This button permanently removes the site and all associated data. **Note:** This action cannot be undone. Use with caution.

To copy and share the URL, click the copy icon next to the site URL. When successfully copied, the message **Site URL copied to the clipboard** displays.



Figure 8 Copy URL Function

Click **Edit URL** to make any changes when needed.

4.2 Sign In, Out & Time Out

What you can do on this page:

- **Configure** how customers are redirected after completing a payment.
- **Specify custom Sign Out and Time Out URLs** (before and after payment), choose whether to skip the success page, and control when and how customer data is appended to the redirect URL—either using HTTP GET or POST methods.

Refer to the following table for data entry instructions.

Table 5 Sign Out & Time Out Page Fields

FIELD	DATA ENTRY INSTRUCTIONS
Sign In	
Customer Sign In Options **(Storefront Only)**	Select if customers should be required or have the option to sign in/create an account before completing payment. Here is what each option means: • **Sign In Not Available:** Customers cannot sign in. • **Sign In Optional**: Customers can choose to sign in or proceed as guests. • **Sign In Required**: Customers must sign in to complete a purchase. This ensures all transactions are tied to a user account.
Sign Out & Time Out	
Sign Out & Time Out URL before Successfully Completing a Payment	If the user has not successfully completed a payment and the user either signs out or their user session expires, then the user will be redirected to this URL. If the URL needs any data from Integrated Payments. then set '"Append Data to the Sign Out URL"' to an HTTP method supported by the URL. Make sure to include **http://** or **https://**
Sign Out & Time Out URL after Successfully Completing a Payment	If the user has successfully completed a payment and the user either signs out or their user session expires. then the user will be redirected to this URL. If the URL needs any data from Integrated Payments. then set “Append Data to the Sign Out URL” to an HTTP method supported by the URL. Make sure to include **http://** or **https://**
Skip success page	When selected, customers who complete payments will not be shown a page that the transaction was successful.
Redirect customer only after transaction posts	When selected and a URL exists after successfully completing a payment. then customer will not be redirected to the URL until after the payment is sent successfully to the student system.

FIELD	DATA ENTRY INSTRUCTIONS
Append Data to the Sign Out URL	Allows Integrated Payments to provide data to the Sign Out URL(s) specified. 'get' method is typically used to request data about a specified resource. and data is added to the end of the URL in the format of **"?name1:value1&name2:value2'"**. 'post' method is typically used to send data that creates a resource, and data is sent in the HTTP request itself in the format of "name1=value1&name2=value2" instead of at the end of the URL

4.3 Payments

What you can do on this page:

- **Configure accepted payment types** for your site, including credit cards, electronic checks (ACH), and international payments.
- **Enable or disable** each method, apply security checks like AVS (address verification system) and CID (card identification) for credit cards, and define behavior for multiple payment attempts within 24 hours.
- **View** which sections are currently available or unavailable.

Refer to the following table for data entry instructions.

Table 8 Payments Page Fields

FIELD	DATA ENTRY INSTRUCTIONS
Credit Card	
Allow credit card payments	Enable this if the store should accept credit card payments.
Perform address verification system (AVS) checking	Select this to enforce address verification on credit card payments. This setting is recommended.
Perform card identification number (CID) checking	Select this to enforce card identification checking on credit card payments. This setting is recommended.
eCommerce Credit Card Payment Code	Select the payment code that should be associated with credit card transactions in this store.
eCommerce Credit Card Terminal	Select the credit card terminal to be used with this store.
Electronic Check (ACH)	
Allow consumer electronic check payments	Enable this if the store should accept consumer electronic check payment.
Consumer Electronic Check Payment Code	Select the payment code that should be associated with consumer electronic check payments in this store.
Allow corporate electronic check payments	Enable this if newly created merchants should accept corporate electronic check payments. (Default Merchant)

FIELD	DATA ENTRY INSTRUCTIONS
Corporate Electronic Check Payment Code	Select the payment code that should be associated with corporate electronic check payments in newly created merchants. (Default Merchant)
Electronic Check Merchant Account	Select the electronic check merchant account to be used with this store.
International Payment	
Allow international payments	Enable this if the store should accept international payments.
Transact International Payment Terminal	If international transactions should be accepted through Transact IFT for this store, select the terminal to use. If Transact International Payments credit card payments should be allowed, make sure to enable “Allow credit card payments.”
Convera International Payment Terminal	If international transactions should be accepted through Convera for this store, select the terminal to use.
Flywire International Payment Terminal	If international transactions should be accepted through Flywire for this store, select the terminal to use.
Purchase Order (Storefront Only)	
Allow purchase order payments	Enable this if the store should accept purchase order payments.
Recent Payment Warning This section allows you to define how the system should respond when multiple payment attempts are made on the same account within a 24-hour period. You can choose from the following behaviors.	
Don't show a warning and allow unlimited payments	No alerts are shown to the customer, and they can submit as many payments as they want, regardless of amount or frequency.
Show a warning to the customer that other payments were made	The system notifies the customer that previous payments have been made within the last 24 hours, but it still allows them to proceed.
Show a warning to the customer that other payments were made and prevent same dollar amount transactions	The system alerts the customer and blocks any new payment attempts that match the exact dollar amount of a previous transaction within the 24-hour window.
Payment History (Storefront Only)	
Show transactions from other merchants in payment history	Select this to show transactions made by other merchants on pages showing payment history. For Storefront merchants. the customer must be signed in to see payment history.

4.4 Service Fees

The Service Fees page allows you to assign service fee plans to storefront items by payment method. Fees are organized across three tabs — Credit Card, Consumer Electronic Check, and International Funds Transfer — each listing the available fee plans configured for that payment type. To assign items to a fee plan, drag and drop them into the corresponding plan's drop zone. Select **View Fee Plan** to review the details of any fee plan or View Site to preview the storefront.

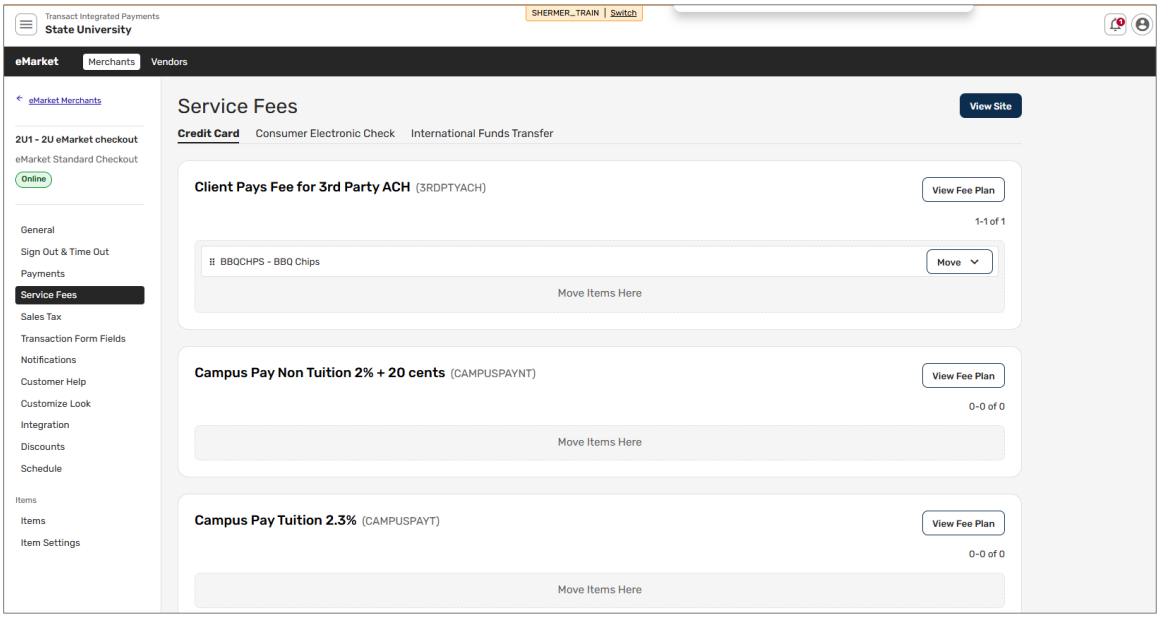


Figure 10 Service Fees Page

Select the **Move** button to move an item to a different service fee section or drag and drop it to the section of your choice.

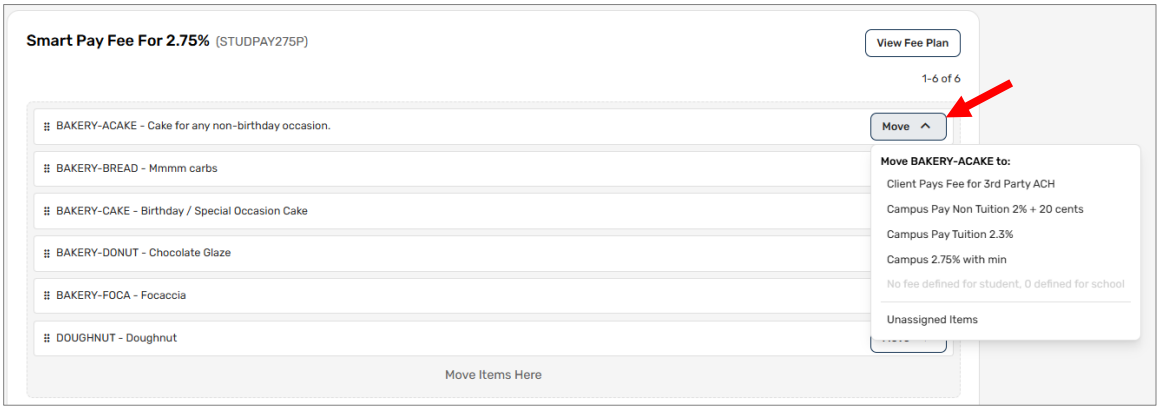


Figure 6 Service Fees Move Button

4.5 Sales Tax

What you can do on this page:

- **Set the Merchant Zip Code**: A valid 5-digit zip code is required to determine tax applicability based on your business location.
- **View and Manage Applicable Sales Tax States**:
  - Set which states have sales tax applied (e.g., Arizona).
  - Use the **Edit States** button (Storefront) or the **Add States** button (Checkout) to add or modify the list of applicable states.
  - Use the **Remove** link to delete a state from the list.
- **Save Changes**: After making updates, click **Save Changes** to apply them.
- **Preview** how these settings affect your storefront. (View Site)

This page ensures your institution collects the correct sales tax based on location and applicable state regulations. For a comprehensive overview and step-by-step instructions, please refer to the classic admin version of the eMarket User Guide.

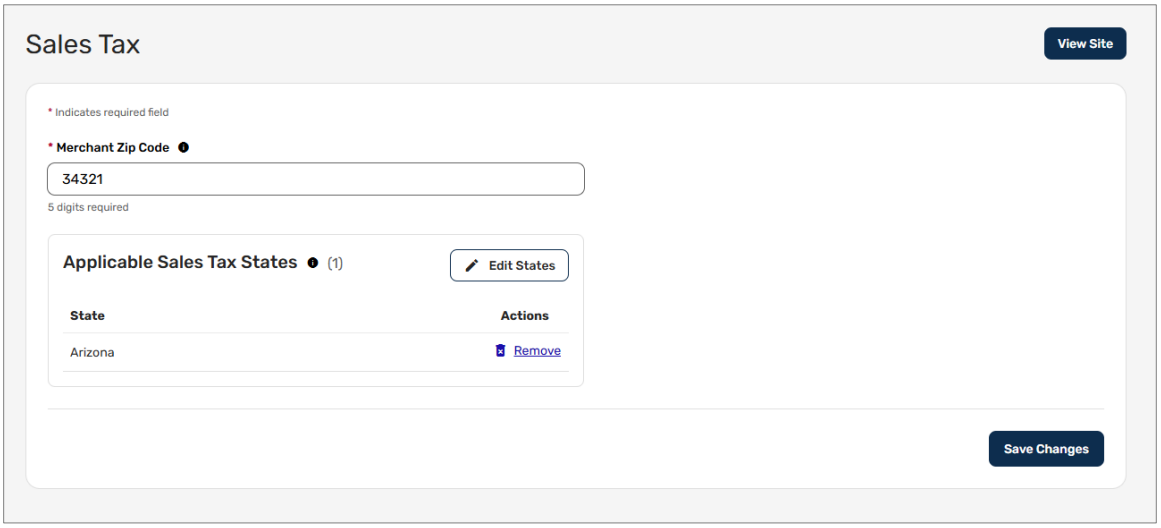


Figure 11 Sales Tax Options

4.6 Transaction Form Fields

Transaction form fields can be added to capture or display information within a transaction. These fields may include input types such as text boxes, radio buttons, and dropdown menus for data collection, as well as static text elements for presenting information.

What you can do on this page:

- **Add or Edit Form Fields**: Use the "Edit Fields" button to create or modify fields such as text boxes, radio buttons, or drop-down menus.
- **Preview Selected Fields**: The "Selected Fields Preview" section shows how the fields will appear to customers on the "Additional Information" page—this page comes before the "Payment Method" step during checkout.
- **Customize Customer Input**: These fields can be used to gather extra details from customers, such as preferences, special instructions, or required information for processing the transaction.

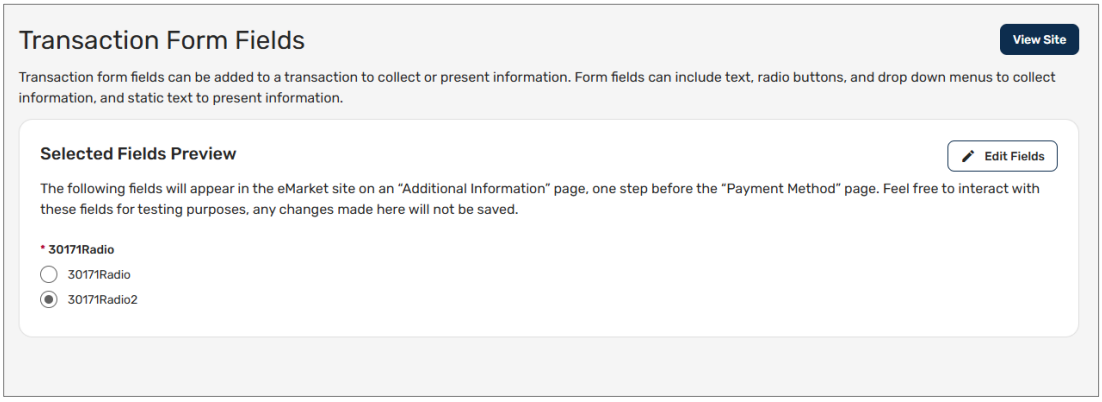


Figure 12 Transaction Form Fields Page

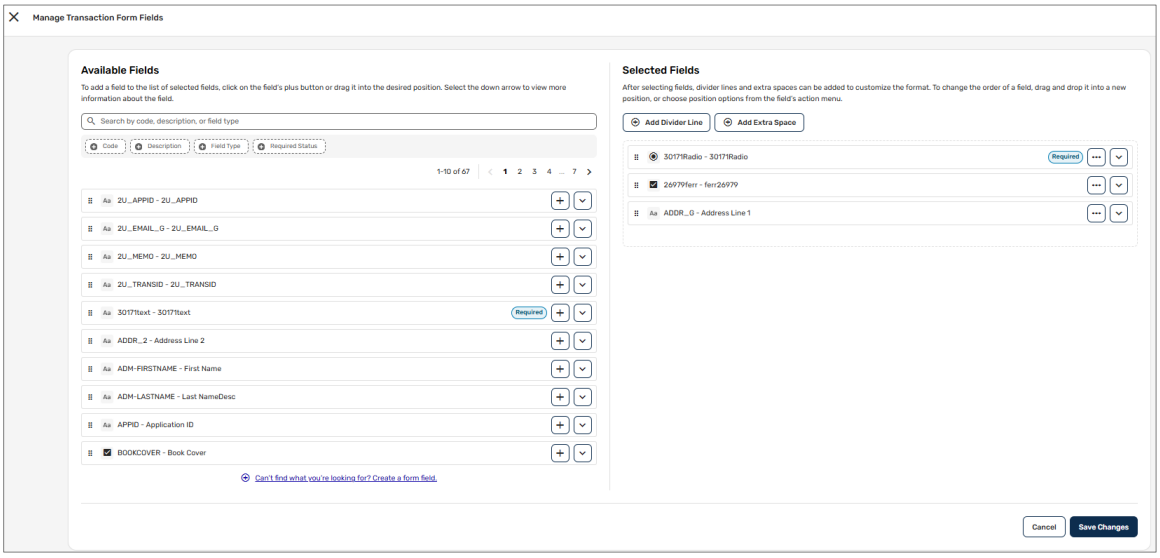


Figure 13 Manage Transaction Form Fields Page

4.7 Notifications

What you can do on this page:

- **Configure** how your eMarket handles email and HTTP notifications for transaction-related events.
- **Email Notifications:**
  - Set the sender email address (required).
  - Choose to send receipts and fulfillment emails to customers.
  - Add up to 10 administrator email addresses to receive alerts.
  - Enable notifications for successful and/or failed transactions.
- **HTTP Notifications:**
  - Enable HTTP callbacks to notify your systems of successful or failed transactions in real time.
  - eMarket HTTPS notifications now support basic HTTP authentication, allowing you to require a username and password to secure the connection between eMarket and your receiving server.

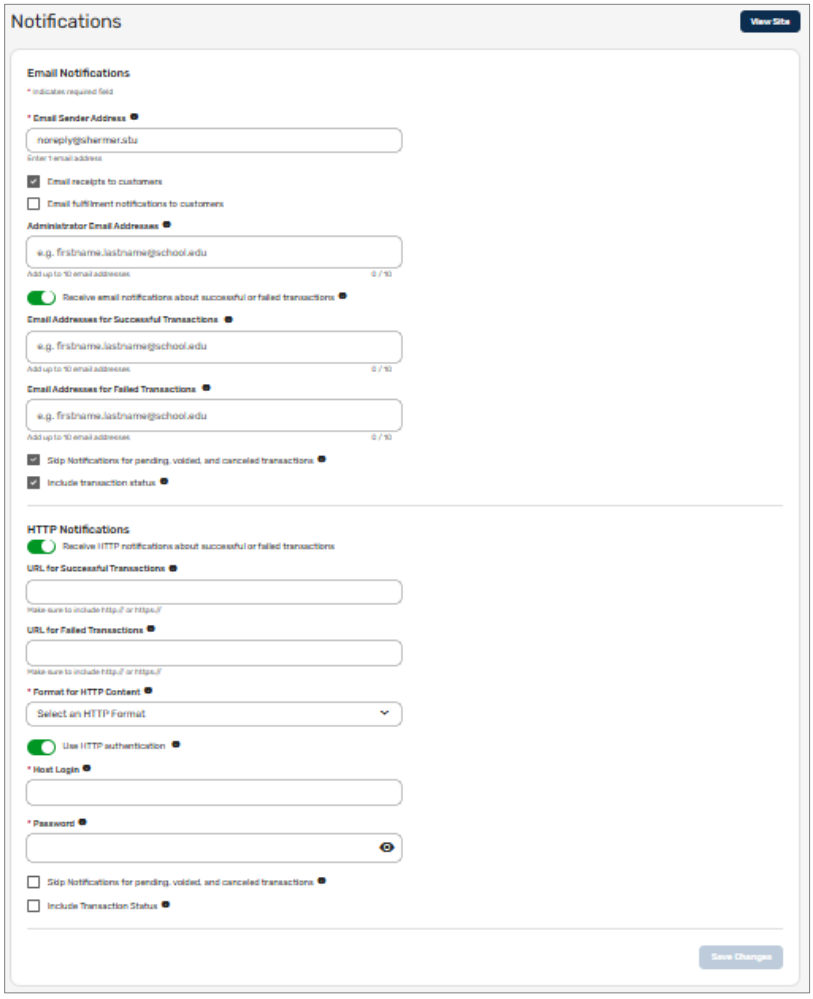


Figure 14 Notifications Page

This page ensures your institution stays informed about transaction activity and can automate follow-up actions as needed. Refer to the following table for data entry instructions.

Table 9 Notifications Page Fields

FIELD NAME	DATA ENTRY INSTRUCTIONS
Email Notifications	
Email Sender Address	Email address that all merchant-related email notifications will appear to be from. Enter 1 email address.
Email receipts to customers	When enabled, customers will automatically receive an email receipt confirming their payment details after a successful transaction.
Email fulfillment notifications to customers	When enabled, customers will receive an email when their order has been fulfilled or processed, keeping them informed of the status of their purchase.
Administrator Email Addresses	Email addresses receive email notifications for: Batch rollover failures, HTTP notification failures, auto payment failures, auto payment plan deactivations, auto payment processing summaries. Add up to 10 email addresses.
Receive email notifications about successful or failed transactions	Allows specific email addresses to receive notification emails for successful and/or failed transactions.
Email Addresses for Successful Transactions	Email addresses that will be notified of every successful transaction completed at this merchant. Add up to 10 email addresses.
Email Addresses for Failed Transactions	Email addresses that will be notified of every transaction attempted that was not successful at this merchant. Add up to 10 email addresses.
Skip Notifications for Pending, Voided, and Canceled Transactions	Email notifications will not be sent regarding pending, voided, or cancelled transactions.
Include Transaction Status	Provides current transaction status within the notification.

FIELD NAME	DATA ENTRY INSTRUCTIONS
HTTP Notifications New outbound connections from CASHNet.com will not work until they are allowed through the Transact Payments firewall. Please contact Illumia Client Support if you need to enable a new connection.	
Receive HTTP notifications about successful or failed transactions	Integrated Payments will automatically send real-time updates to a specified URL on your system whenever a transaction is completed—whether it succeeds or fails. This allows your institution to: • Automatically update internal systems (e.g., databases, order fulfillment tools). • Trigger custom workflows based on transaction outcomes. • Improve integration between your eMarket and other platforms or services. It is especially useful for institutions that need immediate, automated responses to payment activity.
URL for Successful Transactions	The web address that the system will notify for every successful transaction completed at this merchant. Make sure to include **http://** or **https://**
URL for Failed Transactions	The web address that the system will notify for every transaction attempted that was not successful at this merchant. Make sure to include **http://** or **https://**
Format for HTTP Content	GET method is typically used to request data from a server and supports Name Value or XML formats. POST is typically used when sending data to a server that needs to create a resource based on that data and supports only Name Value format.
Use HTTP authentication	Enable authentication when the URLs for Successful and Failed transactions require a usemame or password in order for this merchant ID to notify the URL host of the transaction.
Host Login	Enter the username for basic HTTP authentication.
Password	Enter the password for basic HTTP authentication.
Skip Notifications for Pending, Voided, and Canceled Transactions	Select if HTTP notifications should not be sent regarding pending, voided, or canceled transactions.
Include Transaction Status	Select if the HTTP notification should send a parameter for the transaction status. This is most often used for international transactions or transactions requiring fulfillment where the transaction may not be completed right away.

Click **Save Changes**.

4.8 Customer Help

What you can do on this page:

- **Set up contact information** that will be displayed to customers who need assistance while using your eMarket site.
- **Enter a Help Email Address** (up to 320 characters) for customer support inquiries.
- **Enter a Help Phone Number** (up to 20 characters) for direct assistance.
- **Preview** how this information appears to customers. (View Site)

This ensures customers have clear and accessible support options during their shopping experience.

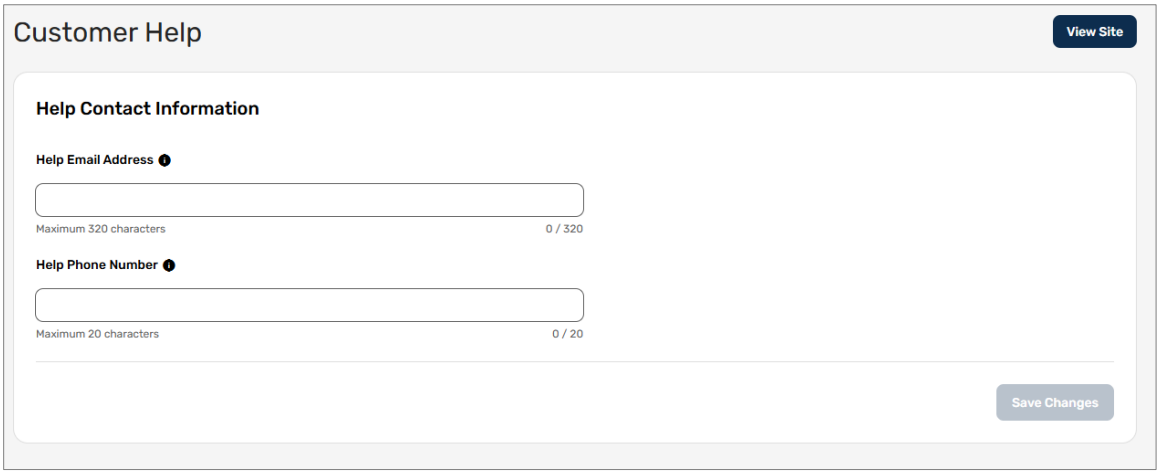


Figure 15 Customer Help Page

Table 10 Customer Help Fields

FIELD NAME	DATA ENTRY INSTRUCTIONS
Help Email Address	If populated, this email address will display in the help section of the eMarket site. (Maximum 320 characters)
Help Phone Number	If populated, this phone number will display in the help section of the eMarket site. (Maximum 20 characters)

4.9 Customize Look

What you can do on this page:

- **Personalize the visual branding** of your eMarket interface.
- **Upload a custom logo**, add banner images, and define specific color themes to match your organization's style.

1. When uploading an image, ensure that it meets the image requirements.

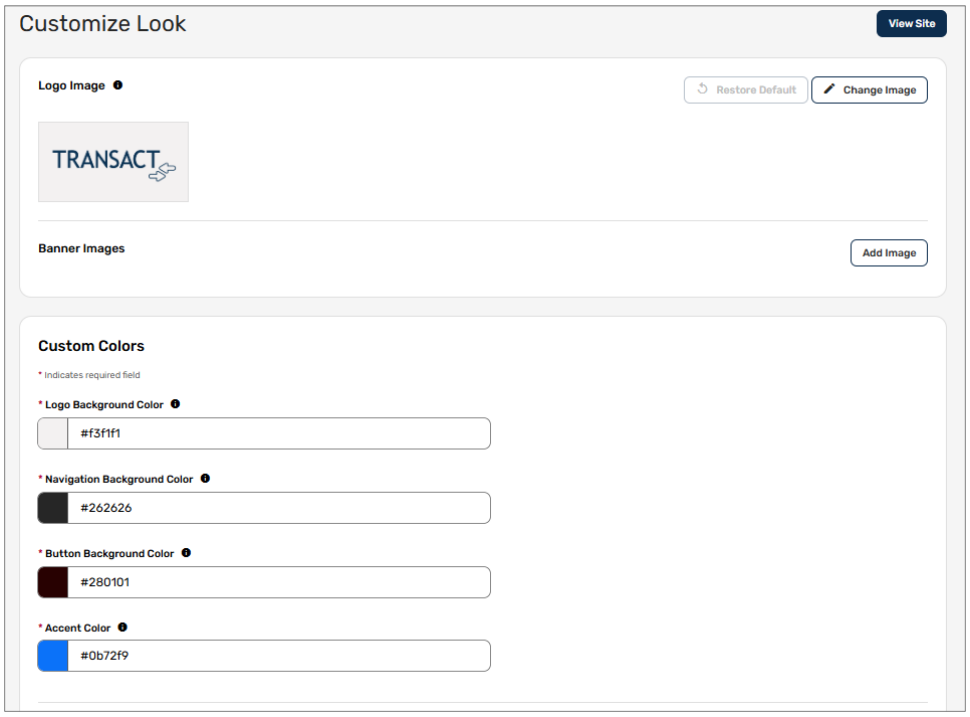


Figure 16 Customize Look Page

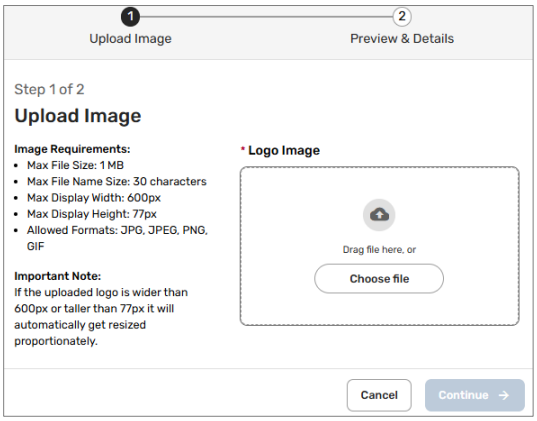


Figure 7 Image Upload Window and Requirements

2. To lock these colors across all merchants, clear the **Allow colors to be customized in all eMarket merchants** checkbox. This setting can only be changed from the default merchant.

4.10 Discounts

What you can do on this page:

- **Manage discounts** for your eMarket.
- **Use the available tools** to view, expire, delete, and create new discounts.
- **View** your site.

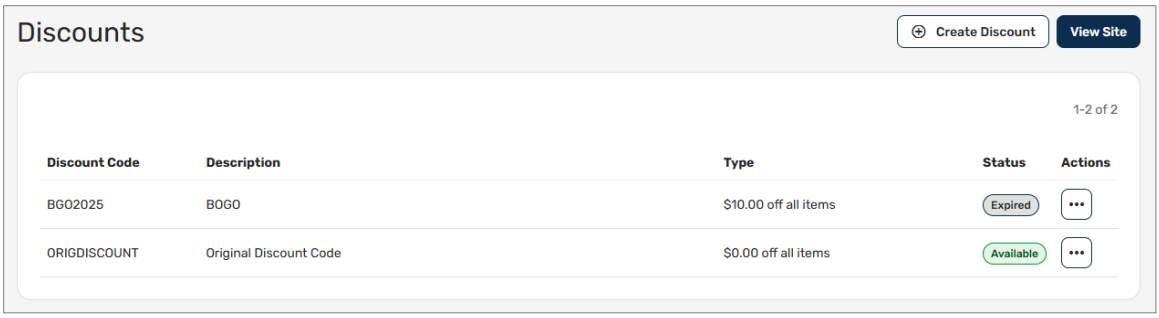


Figure 17 Discounts Page

Refer to the following table for data entry instructions.

Table 11 Discounts Page Columns and Descriptions

COLUMN	DESCRIPTION
Discount Code	Displays the unique code associated with each discount offer in the system. These codes are alphanumeric and are used by customers during checkout to apply a specific discount to their purchase. A maximum of 12 characters allowed.
Description	Provides a brief summary or label for each discount listed. It helps users quickly identify the purpose or context of the discount without needing to open its full details.
Type	Indicates the method or structure of the discount being applied. It helps users quickly identify how the discount works and what kind of value it offers. Examples of discount types: • **Percentage** – e.g., 15% off • **Fixed Amount** – e.g., $5 off • **BOGO** – e.g., Buy one, get one free
Status	Displays the current state of each discount. It helps users quickly identify whether a discount is still active or no longer valid. Values: • **Available** – The discount is currently active and can be applied to transactions. • **Expired** – The discount has passed its end date or has been manually expired and is no longer usable.
Actions	Use this menu to view discount details, expire the discount, or delete it altogether.

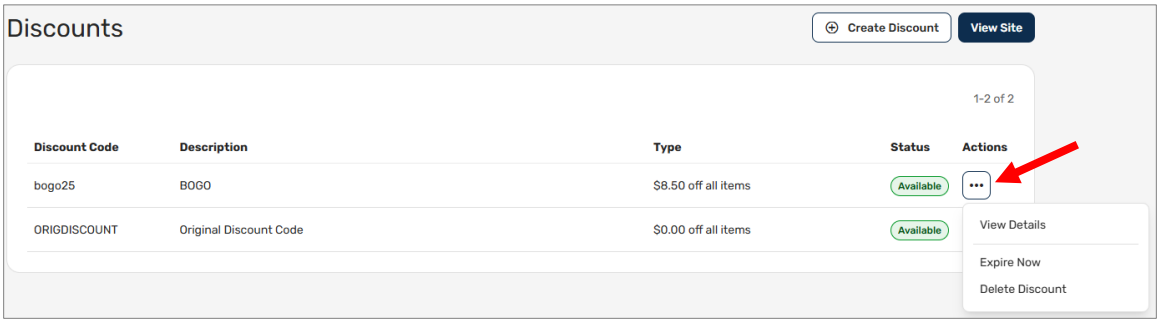


Figure 18 Discount Actions Menu

To create a new discount:

1. First, select a Merchant to apply the discount to.
   a) Either select the Merchant Code link or click **Actions** > **View Details**.

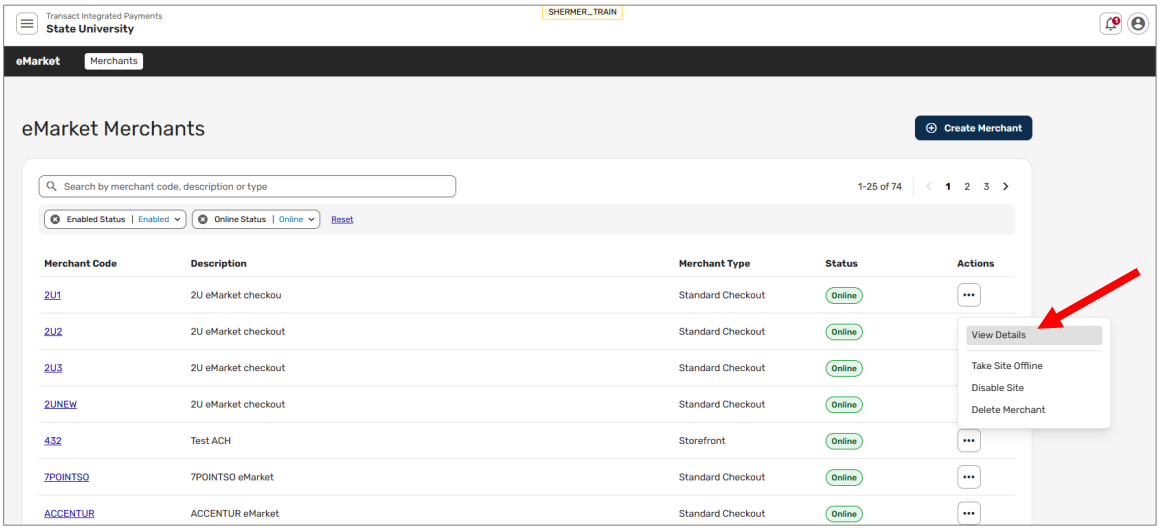


Figure 19 Selecting a Merchant

2. Select the **Discounts** navigation link from the left navigation pane.

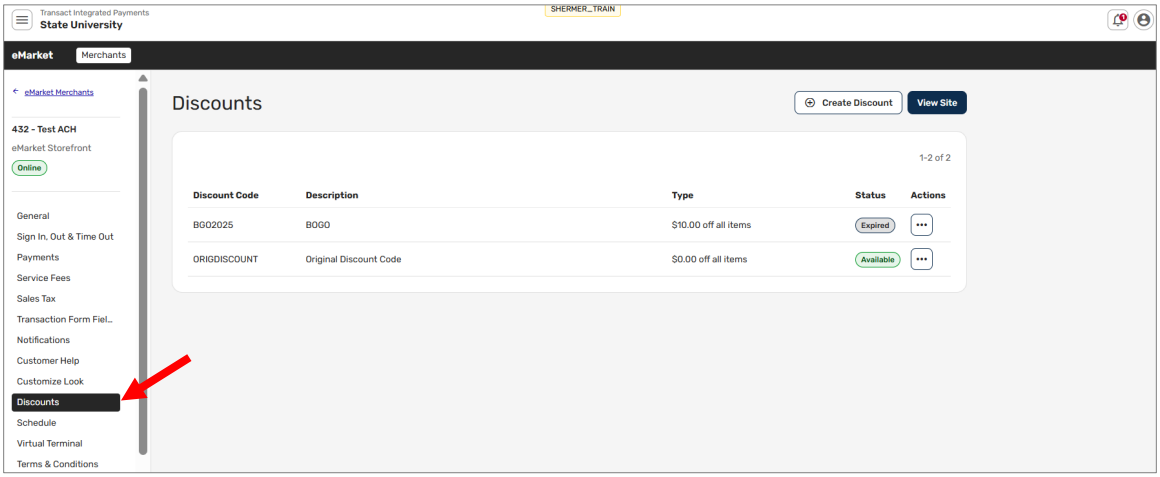


Figure 20 Discounts Navigation Link

3. In the upper-right corner, click **Create Discount**.

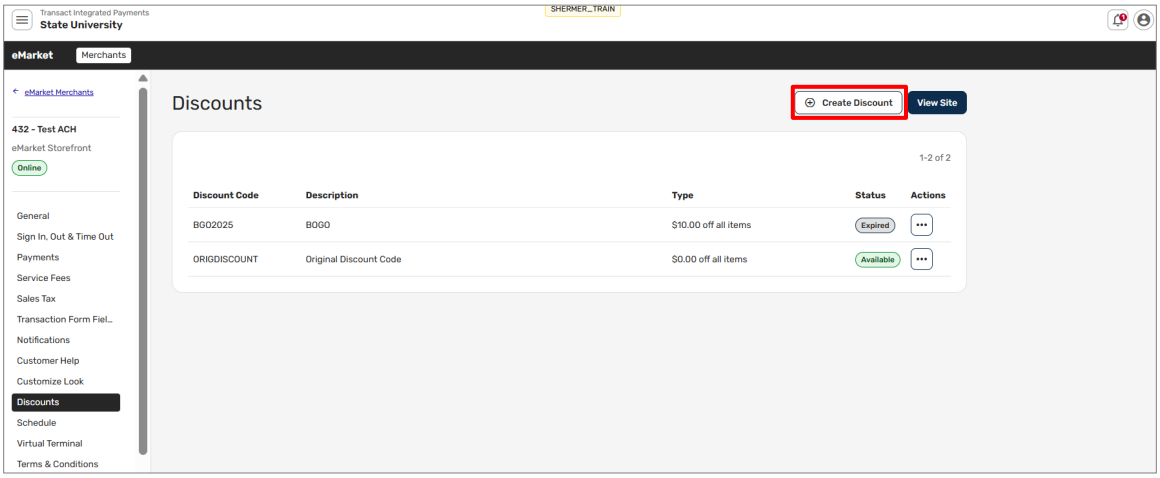


Figure 21 Create Discount Button

4. Refer to the following table when configuring the discount.

Table 6 Discount Fields

FIELD	DATA ENTRY INSTRUCTIONS
Description	Enter a description. (Maximum 50 characters) The description provides a brief summary or label for the discount. It helps users quickly identify the purpose or context of the discount without needing to open its full details. An example would be **Student Discount**.
Discount Code	Enter a discount code. (Maximum 12 characters) This should be a unique code associated with the discount offer. These codes are alphanumeric and are used by customers during checkout to apply a specific discount to their purchase. An example would be **STUDISC10** (Student Discount 10%).

FIELD	DATA ENTRY INSTRUCTIONS
Discount Type	Choose whether the discount will be applied as a fixed dollar amount (Amount off) or as a percentage of the purchase total (Percent off). • If the discount is a fixed amount, enter the amount. (Minimum $0.01, Maximum $1,000,000.00) • If the discount is a percentage, enter the percentage. (Minimum 0.01%, Maximum 100%)

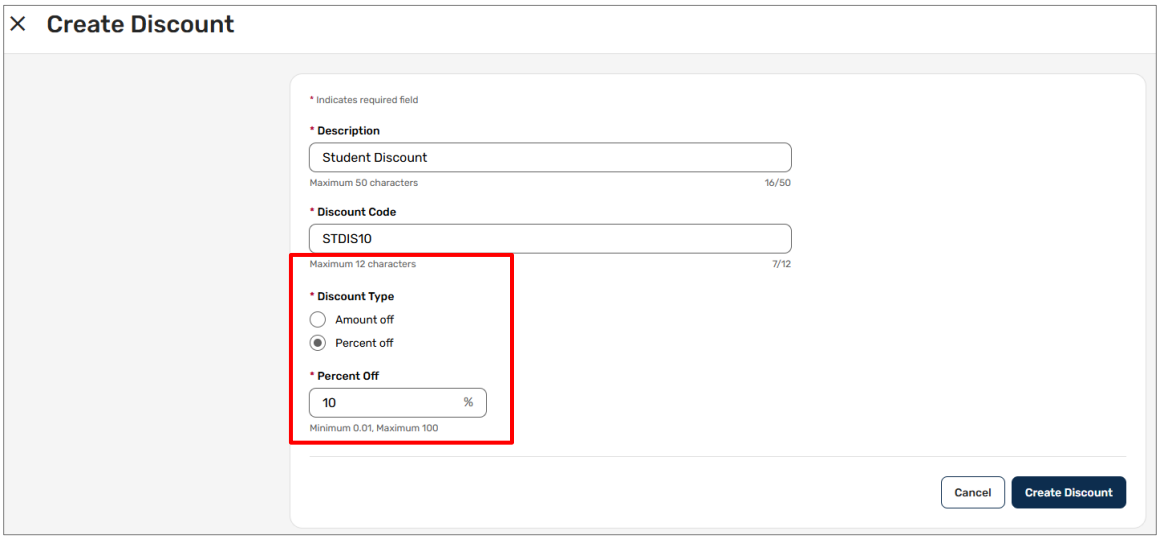


Figure 22 Create Discount Page

5. Click **Create Discount**.

4.11 Schedule

You can take a store offline, bring it online, or implement it at any time using the **Schedule** page. This tool allows you to set specific start and end dates for store availability. However, please note that only one schedule can be active at a time.

If you need to repeat a schedule (e.g., bringing the store online again next year), you will need to manually re-enter the dates after the current schedule has ended. For example, if you set the store to go online at midnight on December 1 and offline on December 31, you must reset the dates after December 31 to repeat the same schedule for the following year.

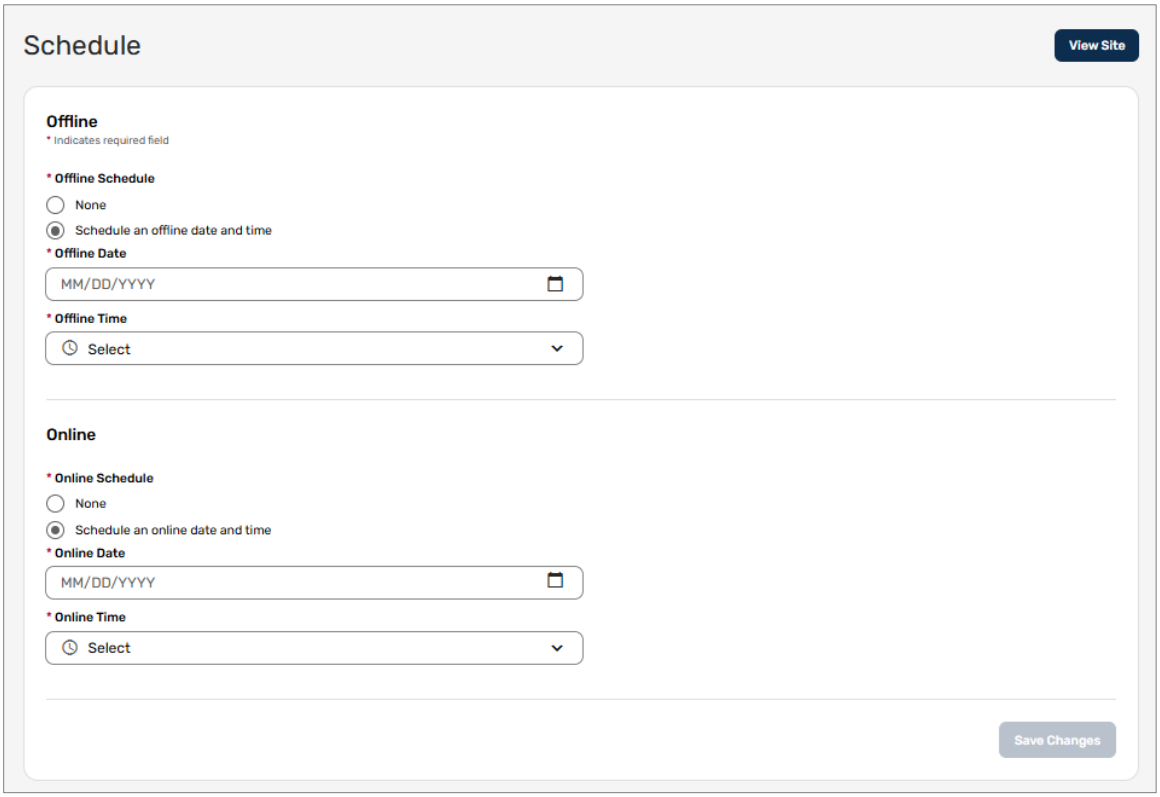


Figure 23 Schedule Page

Refer to the following table for data entry instructions.

FIELD	DATA ENTRY INSTRUCTIONS
	Offline
Offline Schedule	Select **None** for no offline schedule or Schedule an offline date and time. Select the offline date when the schedule starts, and then the time it starts.
Online Schedule	Select **None** for no Online schedule or Schedule an online date and time. Select the online date when the schedule starts, and then the time it starts.

4.12 Virtual Terminal (Storefront Only)

Use the Virtual Terminal page to manage your credit card terminal settings and control access to your virtual terminal.

On this page, you can:

- **Select terminal types** for both Retail and Mail Order/Telephone Order (MOTO) transactions using dropdown menus.
- **Access the Virtual Terminal** via a provided URL link.
- **Choose allowed devices** by selecting either "All devices" or "Only selected devices" for virtual terminal access.
- **Manage your merchant image** by uploading a new image or deleting the current one.

This page ensures you have full control over how your virtual terminal operates and who can access it.

Refer to the following table for data entry instructions.

Table 12 Virtual Terminal Fields

FIELD NAME	DATA ENTRY INSTRUCTIONS
Credit Card Terminals	
Retail Credit Card Terminal	Select the retail credit card terminal that should be used when card present transactions are processed via Virtual Terminal. Card Present Example: A customer is physically present, hands their credit card to a school operator, and the school operator inserts or swipes the credit card on a device.
Mail Order/Telephone Order (MOTO) Credit Card Terminal	Select the MOTO credit card terminal that should be used when card-not-present transactions are processed via Virtual Terminal. If the volume of card-not-present transactions is low, you can use the Retail Credit card Terminal to process the occasional card-not-present payments. Please ensure the MOTO checkbox is selected on the Retail Credit Card Terminal to allow this terminal to be used for MOTO processing. Card Not Present Example: A customer is on the phone, they verbally give their credit card information to a school operator, and the operator uses a credit card device to enter the credit card information.
Virtual Terminal Access	
URL for all Virtual Terminals	To change the URL for all Virtual Terminals, edit the Control Parameters “Site Name” field. If the “Site Name” field is blank. “Not Defined Vet” will appear here instead of a URL.
Allowed Devices	
Allowed Virtual Terminal Devices	Choose whether all Virtual Terminal devices will appear in this merchant's list of available devices. or if only selected devices will appear.

FIELD NAME	DATA ENTRY INSTRUCTIONS
Available Devices	
This section displays the devices available for use with Virtual Terminal and the devices currently selected for this merchant. What you can do in this section: • Search for a specific device using the **Search by description** field • Add a device by selecting the arrow button next to the device, or by dragging it into the **Selected Devices** box. • Remove a device from the selected list by selecting the arrow button next to the device, or by dragging it back into the **Available Devices** box. • Move all devices in either direction by selecting the **Move All** button.	
Merchant Image	
Choose an image to represent this merchant when a list of available merchants is displayed within Virtual Terminal. To view or change the Logo Image that is shown to customers, select **Customize Look** from the left menu.	

4.13 Terms & Conditions (Storefront Only)

What you can do on this page:

- **Define and manage the terms and conditions** for Auto Pay enrollment.

Note: You must complete the two required fields.

This section ensures users are informed and have explicitly agreed to the Auto Pay terms before activation.

Refer to the following table for data entry instructions.

Table 13 Auto Pay Terms and Conditions Fields

FIELD NAME	DATA ENTRY INSTRUCTIONS
Auto Pay Terms and Conditions	Terms of the Auto Payment that the customer will need to agree to before enrollment. If customer enrolls in Auto Payment at the same time as enrolling in an installment payment plan, then these Auto Payment terms will not display during installment plan enrollment. (Maximum 10,000 characters)
Auto Pay Terms and Conditions Agreement Prompt	Text that shows next to the agreement checkbox. (Maximum 500 characters)

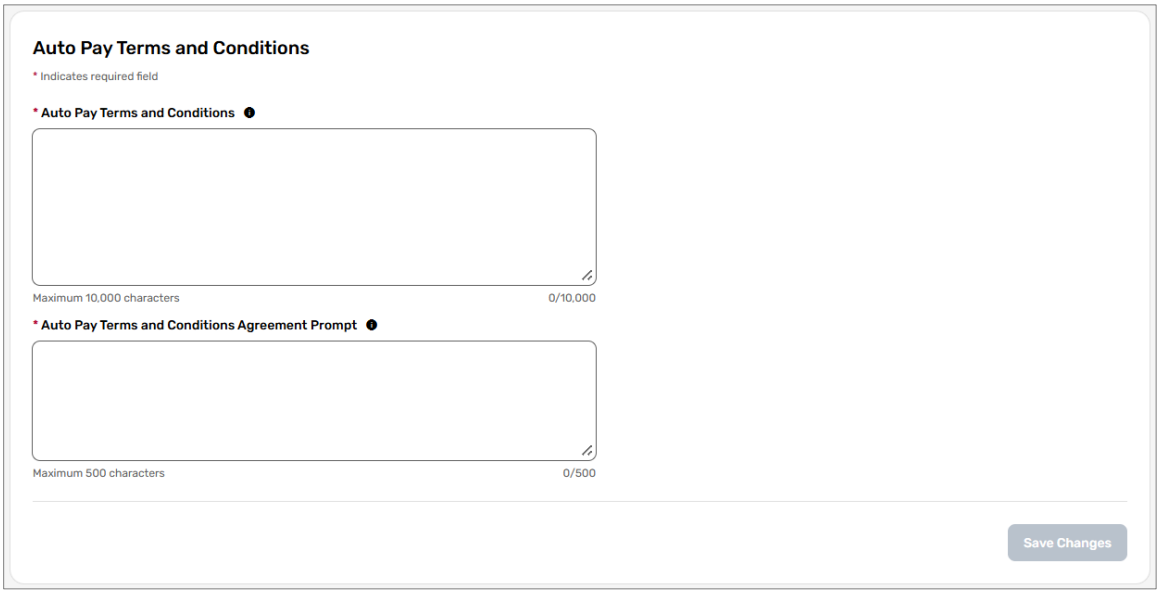


Figure 24 Auto Pay Terms and Conditions Page

6. Click **Save Changes**.

4.14 Items

What you can do on this page:

- **Manage** your inventory efficiently.
- **Create** new items.
- **Search** for existing items.
- **Filter items** by status.
- **View item details** such as code, name, price, and status on the item table.
- **Access item actions** by clicking the three-dot menu next to each item.
- **Set default values** for newly created.

This page helps you keep your inventory organized and ensures each item is properly configured for your eMarket site.

To create an item:

1. Click **Create Item**.

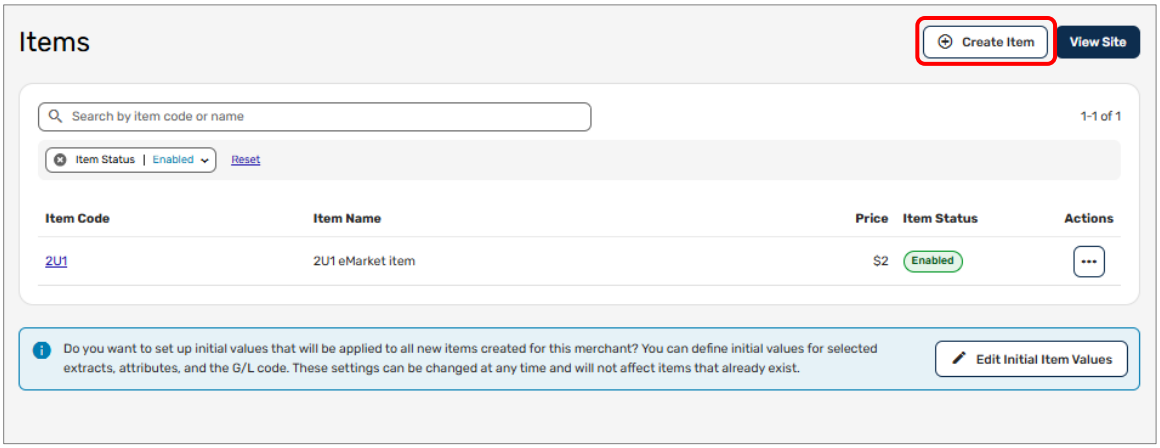


Figure 25 Items Page Create Items Button

2. Refer to the table below to complete your setup.

Table 14 Item Fields

FIELD	DATA ENTRY INSTRUCTIONS
Item Name & Description This is the information that displays in the Items page.	
Item Code	How the item is uniquely identified within the Integrated Payments system. When a default item is set, an identifier displays to indicate which item is the default.
Item Name	Descriptive name of the item visible to customers and operators. (Maximum 105 characters)
Price	The set price for the item.
Item Status	The status of the item. Enabled or Disabled.
The following are the navigation links that display in the left navigation pane when creating an item.	
General (Item Details)	
Item Name	Descriptive name of the item visible to customers and operators. Optionally change the item name. You can change the item name if needed. (Maximum 200 characters)
Item Description	Longer description about the item. You can change the item description if needed. (Maximum 500 characters)
Receipt Text	Additional information about this item that will only be shown in an email to the customer and on the merchant's receipt page. Simple HTML formatting is allowed for this field.
Item Group	Allows similar item codes to be grouped for reporting purposes such as creating Paid Items and Extract Reports that sort in a logical manner.

FIELD	DATA ENTRY INSTRUCTIONS
Item Availability	The system displays the item's current status. You can choose to Disable or Delete the item if needed. • **Disabling** an Item: When you disable an item, it remains in the system but is no longer visible or available for purchase on the storefront. You can re-enable it at any time if needed. This is useful for temporarily removing items without losing their data or configuration. • **Deleting** an Item: Deleting an item permanently removes it from the system. You cannot recover the item, or its settings once deleted. Use this option only when you are sure the item is no longer needed.
Organization & Item Image (Storefront Only)	
Place in the featured items section	In ePayment. this item will be included on the Overview page's available items section. In eMarket, this item will be shown in the featured items section above all other categories and items on the page. When viewing a category page within ePayment or eMarket, this item will be shown within the category's featured items section above all other items.
Highlight as a new item	A visual label of “New” will appear to customers next to this item’s name within any item list.
Item Category	Select the category, this item should appear under or create a new category.
Item Order	Enter a number to determine the order this item will display in the eMarket. If no value is specified, items will display alphabetically by item code. (Minimum 1 | Maximum 9,999)
Item Image	Change or delete the item’s image.
Create/Edit Category (Storefront Only)	
Category Name	Short descriptive name of the item category. i.e., Healthy Snacks (Maximum 50 characters)
Category Description	Description of the item category. i.e., Snacks made with organic ingredients. (Maximum 500 characters)
Category Code	How the item category is uniquely identified within the Integrated Payments system. (Maximum 12 characters)
Parent Category	When selected, the current category will be placed within the parent category. With no selection, then the current category will be available from the merchant's initial list of items and categories.
Category Image	Add an image for this category. Optionally delete it.
Pricing & Quantity	
Allow customer to enter a payment amount	When enabled, the customer can enter a payment amount which can be restricted by defining a maximum payment amount.
Default Payment Amount	Amount that initially appears for item’s price, which the customer can change.

FIELD	DATA ENTRY INSTRUCTIONS
Maximum Payment Amount	Highest amount that a customer can enter for the item's price.
Allow customer to choose a quantity	When enabled, customers can select the quantity number of this item to purchase, which can be restricted by defining a minimum and/or maximum allowable quantities. Cost is calculated as the item price multiplied by the quantity selected.
Item Price	The cost of purchasing this item.
Minimum Allowable Quantity	The smallest number of units that a customer can purchase.
Maximum Allowable Quantity	The largest number of units that a customer can purchase. (Maximum 9,999)
Auto Pay (Storefront Only)	
Allow Auto Pay	Enables customers to enroll in one time or monthly automatic payments for this item. Terms and Conditions must be set up for this merchant before allowing auto pay for any item. When a customer is currently enrolled in auto pay with a status of active, auto pay cannot be disabled, any changes made to auto pay settings will not affect existing enrollments, and changes will only affect what is presented to customers during enrollment.
Frequency	Choose how often that auto payments will be processed for this item. "User Can Select" allows the customer to select from the other Frequency options.
Process first payment immediately	Customer will be charged for this item when auto payment enrollment is completed. This counts as one payment toward the count of number of payments associated with the enrolled auto pay plan.
Allow the Customer to Choose the Auto Pay Date	Determines if the customer can select the auto payment to start occurring on a specific day of the month, the exact starting date, or if the customer must use the auto pay plan's defined day of month.
Auto Pay Day of Month	The day of the month that auto payment will occur on. (Maximum 31)
Allow the Customer to Choose the Number of Payments	When enabled, customer will have the option to specify the number of auto pay payments that will be processed until all payments are completed or until the customer chooses to deactivate the plan, whichever happens first.
Number of Payments	The number of payments that the customer will be charged over time. (Maximum 99)
Add-On Items (Storefront Only) Add-on items are items that appear as suggested items when viewing the details of an item. If you would like an item to only be available as an add-on item, check the "Only available as an add-on item" checkbox located on the item's "Purchase Restrictions & Inventory" tab.	

FIELD	DATA ENTRY INSTRUCTIONS
Available Items	This section displays all available items that you can assign as sub items. Use the search box to find a specific item by name or code. To browse through the list, click the navigation arrows. To move an item from one side to the other, click on the item's arrow button or drag it into the other side's box. You may also click on the "Move All" buttons.
Selected Add-on Items	To move an item from one side to the other, click on the item's arrow button or drag it into the other side's box. You may also click on the "Move All" buttons.
Sub Items When customers purchase this item, if you would like to automatically replace it with different items (sub items), choose those items here. The total price will then come from the combination of sub items selected - the price of this item will not be included.	
Available Items	This section displays all available items that you can assign as sub items. Use the search box to find a specific item by name or code. To browse through the list, click the navigation arrows. To move an item from one side to the other, click on the item's arrow button or drag it into the other side's box. You may also click on the "Move All" buttons.
Selected Sub Items	To move an item from one side to the other, click on the item's arrow button or drag it into the other side's box. You may also click on the "Move All" buttons.
Tax	
Charge Sales Tax	In order to charge sales tax, this merchant's sales tax setup needs to be completed. After saving your changes, close this page, select "Sales Tax" from the merchant's main menu, make sure the "Merchant Zip Code" field is populated, and make sure at least 1 applicable sales tax state is selected.
Choose other taxes to be charged	Enable if there are additional taxes aside from state sales tax that should be charged when purchasing this item.
Available Other Taxes, Selected Other Taxes	To move a tax from one side to the other, click on the tax's arrow button or drag it into the other side's box. You may also click on the "Move All" buttons.
Create a Tax **Can't find what you're looking for, click the link below to create a new tax.**	
Tax Description	A short description of the tax being charged. (Maximum 50 characters)
Tax Percentage	The percentage of the item price that will be charged as a tax and added to the total cost of the item. Example: A 5% tax applied to a $10 item will result in the item purchase costing a total of $10.50.
View posting details (extracts, terms, and general ledger)	When this tax is charged, select the detailed information to post along with this transaction and where the data is extracted to.
Extracts	

FIELD	DATA ENTRY INSTRUCTIONS
Choose Where to Extract Items	Check the checkbox next to the appropriate extract(s) to indicate that this item code should be included in the extract. If applicable, also select whether to extract this item in summary or detail. If a transaction includes an item that does not have an extract selected, it will not extract. Selecting an option will not retroactively update prior transactions.
Term	
Assign a Term	Associates the tax with the term associated with an item, or a specific term.
Attributes	
Attributes 1 - 4	You have the ability to define custom attribute values that may contain additional information based on your institution's needs. These fields are most commonly used for storing information that would otherwise need to be entered each time the item is used or need to be referenced when extracting the item. (Maximum 50 characters)
General Ledger	
G/L Code	A G/L Code (General Ledger Code) is A unique identifier used to categorize and track financial transactions within an accounting system.
(Omit G/L)	This feature allows users to exclude specific General Ledger codes from being applied to a transaction. This is useful for preventing automatic ledger entries, simplifying reconciliation, and ensuring that only relevant financial data is recorded. (Must contain at least 6 characters | Maximum 6 characters allowed)
Purchase Restrictions & Inventory	
Unique Selection Group	When specified and multiple items exist in the same Unique Selection Group. then customers are prevented from purchasing more than one item within a group for each individual transaction. Assign a Unique Selection Group identifier to each item you want grouped together. (maximum 1 character)
Only available as an add-on item (eMarket storefronts only)	Select this checkbox if the item will only be available for purchase after selecting another item.
Inventory	
Keep track of inventory for this item	When enabled. the number of items available for purchase needs to be defined along with the minimum amount of inventory that determines when the item is out of stock.
Available Inventory	Number of items available for purchase. (Maximum 4 digits)
Minimum Inventory Level Group	When the available inventory number for this item reaches the minimum inventory number defined, then the item will show as out of stock and cannot be purchased until the inventory number becomes greater than minimum inventory. One group can be used for any number of items to enforce the same minimum inventory for each individual item.

FIELD	DATA ENTRY INSTRUCTIONS
Item Form Fields Item form fields can be added to items to collect or present information. Form fields can include text, radio buttons, and drop down menus to collect information, and static text to present information.	
Available Fields	To add a field to the list of selected fields, click on the fields plus button or drag it into the desired position. Select the down arrow to view more information about the field.
Selected Fields	After selecting fields, divider lines and extra spaces can be added to customize the format. To change the order of a field, drag and drop it into a new position, or choose position options from the field's action menu.
Posting	
Extracts	Check the checkbox next to the appropriate extract(s) to indicate that this item code should be included in the extract. If applicable, also select whether to extract this item in summary or detail. If a transaction includes an item that does not have an extract selected, it will not extract. Selecting an option will not retroactively update prior transactions.
Term	Associates the posting with the term associated with an item, or a specific term.
Attributes 1 - 4	You have the ability to define custom attribute values that may contain additional information based on your institution's needs. These fields are most commonly used for storing information that would otherwise need to be entered each time the item is used or need to be referenced when extracting the item. (Maximum 50 characters per entry)
G/L Code	A G/L Code (General Ledger Code) is A unique identifier used to categorize and track financial transactions within an accounting system.
(Omit G/L)	This feature allows users to exclude specific General Ledger codes from being applied to a transaction. This is useful for preventing automatic ledger entries, simplifying reconciliation, and ensuring that only relevant financial data is recorded. (Must contain at least 6 characters | Maximum 6 characters allowed)
Shipping & Fulfillment	
Collect shipping address from customer	Customer will be required to provide a shipping address to purchase the item.
Charge for shipping	Transaction will include a charge for shipping rate based on any selected shipping rates for this item that apply to the customer's shipping address.
Change Shipping Price Based on the Quantity of Items	Determines how much is charged for shipping based on the number of items purchased.
Shipping Percentage Increase for Each Allowed Quantity	Enter the percentage increase in shipping cost that should be associated with specific quantity purchases. Example: When a percentage increase of 30% is defined as a quantity of 2 and the shipping rate's base price is $10. then a customer purchasing a quantity of 2 will be charged $13 for shipping the item.

FIELD	DATA ENTRY INSTRUCTIONS
Available Shipping Rates, Selected Shipping Rates	To move an item from one side to the other, click on the item's arrow button or drag it to the other side. You may also click on the "Move All" buttons.
Fulfillment	Item is a physical good that requires packing.
Require merchants to fulfill this item	Item is a physical good that requires packing.
Create a shipping rate Can't find what you're looking for, click the link below to create a shipping rate.	
Shipping Rate Description	Brief description of the shipping rate.
Estimated Delivery Time	Summary of the estimated delivery time given by the shipping carrier and applicable countries & states.
Shipping Price	Base cost of the shipping charge for a single item. Actual shipping charge will be calculated based on quantity and quantity related pricing method selected within the Item's Shipping & Fulfillment tab.
Applicable Shipping Countries	Add or remove countries for which the shipping rate is applicable.
Limit which states are applicable within the United States	Enable if the shipping rate will apply to only specific states within the United States. Disable this setting to enable the shipping rates for all states. When enabled, add the applicable states.

3. Click **Save Changes**.

4.15 Item Settings

What you can do on this page:

- Toggle the item search field on the storefront shop page.
- Set catalog item and category description display options (e.g., show full description).
- Allow or block customers from adding the same item to the basket more than once.
- Require new item codes to be prefixed with the merchant code.
- Select posting/extract sources for items.
- Define up to four custom item attributes (50 characters each).

Refer to the following table for data entry instructions.

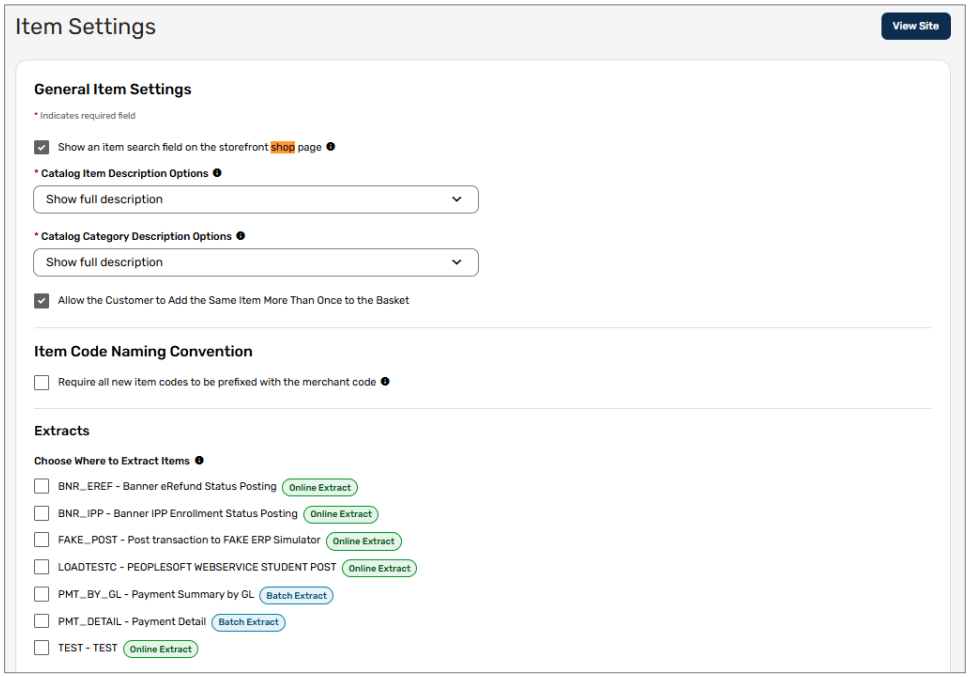


Figure 8 Item Settings Page

FIELD NAME	DATA ENTRY INSTRUCTIONS
General Item Settings (Storefront Only)	
Show an item search field on the storefront shop page	Storefront customers will be able to find items using the item search field displayed below the page header.
Catalog Item Description Options	Select what level of the item's description that should appear on the catalog page. The **Show Partial 0-escription** option will show an option to expand or collapse the description after a certain length.
Catalog Category Description Options	Select the level of the category's description that should appear on the catalog page. The **Show Partial Description** option will show an option to expand or collapse the description after a certain length.
Allow the Customer to Add the Same Item More Than Once to the Basket	When selected, customers can add the same item to the basket more than once.
Item Code Naming Convention	
Require all new item codes to be prefixed with the merchant code	Select this if new items created in the merchant should begin with the merchant code.

FIELD NAME	DATA ENTRY INSTRUCTIONS
Extracts	
Choose Where to Extract Items	Check the checkbox next to the appropriate extract(s) to indicate that this item code should be included in the extract. If applicable. also select whether to extract this item in summary or detail. If a transaction includes an item that does not have an extract selected, it will not extract. Selecting an option will not retroactively update prior transactions.
Attributes	
Attribute 1 – 4	You have the ability to define custom attribute values that may contain additional information based on your institution's needs. These fields are most commonly used for storing information that would otherwise need to be entered each time the item is used or need to be referenced when extracting the item. Maximum 50 characters.
General Ledger (GL)	
G/L Code	A G/L Code (General Ledger Code) is A unique identifier used to categorize and track financial transactions within an accounting system.
(Omit G/L)	This feature allows users to exclude specific General Ledger codes from being applied to a transaction. This is useful for preventing automatic ledger entries, simplifying reconciliation, and ensuring that only relevant financial data is recorded. Must contain at least 6 characters | Maximum 6 characters allowed.
Allow changes to G/L code	This field only applies when using the Integrated Payments Cashiering module. Check this checkbox if the cashier may change the general ledger code for this item code during a transaction. If this item code is meant to be a miscellaneous item code that encompasses a variety of activities, this option is suggested so that operators are allowed to enter the proper account number.