

Mass Account Creation (POS)

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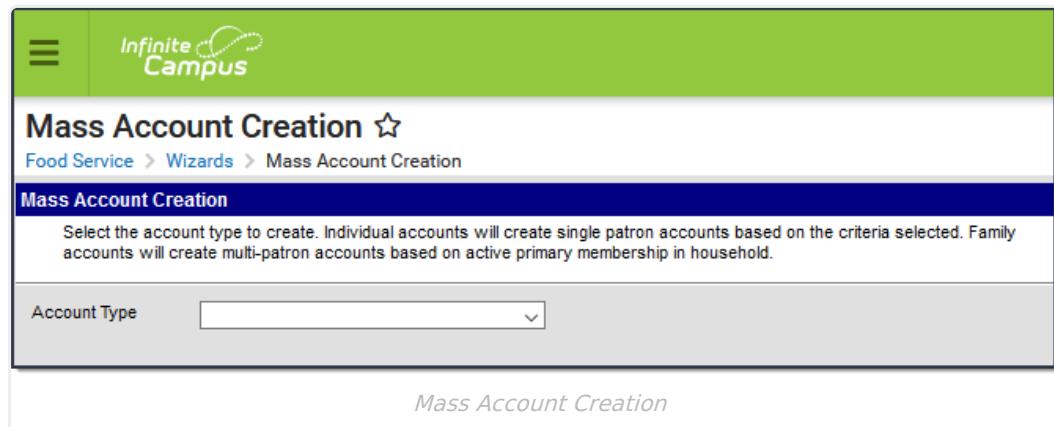
[Important Information about this Tool](#) | [Create Individual Accounts](#) | [Create Family Accounts](#)

This functionality is only available to customers who have purchased Campus Point of Sale as add-on functionality.

Tool Search: Mass Account

The Mass Account Creation Wizard will create POS accounts for individuals en masse. Once an account is created, students/staff members can purchase food items during food service times. Existing accounts will not be overwritten when using this tool. Only students/staff members who do not currently have a POS account will have POS accounts created.

What can I do?	What do I need to know?
<ul style="list-style-type: none">• Create Individual Accounts• Create Family Accounts	Important information about this Tool



Important Information about this Tool

When using this tool, the following **MUST** be considered:

- Large districts (10,000+ accounts) may experience time out and/or account processing issues if running the tool under less than optimal conditions.
- For new districts running this tool for the first time where 8,000 or more new accounts will be created, users are encouraged to select the CSV Report Format option to ensure the report will generate without producing a time out error.
- During generation of the Mass Account Creation Report, users will receive a separate window stating "The system is generating the Mass Account Creation Detail Report for you. Please wait..." Do not click Back or Refresh during this message. The CSV format will generate the

same screen but download locally as a CSV file. This screen may be closed once the CSV file is generated.

- The number of PINs this tool is able to create (if the Generate PIN checkbox is marked) is limited to the number of PIN digits allowed to be entered via the [PIN Auto Gen Preferences](#) tool. Users will encounter an error if attempting to create more accounts than what is possible with the number of PIN digits allowed.
- If your district used the [Set Student Number as PIN Wizard](#) or has the *Auto creation of PIN - Use Student Number as PIN POS Preference* turned on, you must clear the **Generate PIN** checkbox because PINs already exist.

Family Accounts

The following logic is used when determining creation of family accounts:

- Student/staff with an end dated household membership will have an individual account assigned.
- If a household has an existing family account, a newly enrolled student or new staff member in the same household with an active primary membership will be included in the existing family account if the **Add new patrons to existing accounts?** box is marked prior to creating accounts.
- If a student or staff is a primary member of one household and a secondary member of another household, the student/staff will be assigned to the family account where the primary membership exists.
- If a student or staff is a primary member of two households, the student/staff will be added to the family account with the highest memberID (the household where they were most recently assigned as a member).
- Students or staff who are not a member of any household (have an end dated membership in the household or are not in any household) or are only secondary members of any household at the time the tool is run will be assigned an individual account. This includes future dated Household Member Start Dates and future dated Household Member End Dates.

Create Individual Accounts

[Accounts](#) can be created for individual students and staff members en masse.

This tool is most effective for creating new accounts for the next school year for new incoming students and staff. If this tool is used for a past school year, accounts could be created for students who are no longer enrolled in the district (if the district has failed to include an End Date on their enrollment record(s)).

The user responsible for creating accounts for patrons in the district should have at least [RWA tool rights](#) for the Mass Account Creation tool.

1. Select an **Account Type** of Individual Account.
2. Select the **Patron Type**.
3. Mark the **Include District Only Staff** checkbox to create accounts for staff members with [District Employment](#) records where no End Date is present.
4. Select an **Ad Hoc Filter** to create accounts for a specific list of people (if desired). [Ad Hoc filters](#) should be reviewed for accuracy prior to use.
5. Select the **School** for which to create accounts. Only people in the school with an active enrollment or [District Assignment](#) record are included. This field defaults to the school selected in the Campus toolbar.
6. Select the **School Year** for which to create accounts. Only people with an enrollment record in this year (or a subsequent year with no End Date entered) are included. This field defaults to the year selected in the Campus toolbar.
7. Select the **Grade** level of the student for which to create accounts.
8. Mark the **Generate PIN** checkbox to have PINs created and assigned to created accounts. This option is limited based on preferences set in the [PIN Auto Gen Preferences](#) tool.

If your district used the [Set Student Number as PIN Wizard](#) or has the *Auto creation of PIN - Use Student Number as PIN POS Preference* turned on, you must clear the **Generate PIN** checkbox because PINs already exist.

When the Generate PIN checkbox is not marked, the PIN column on the report will be blank

even if these students have their Student number as PIN already set from running the Student ID as PIN wizard.

9. Select the **Report Format**.
10. Select the **Test** button. The Mass Account Creation Detail Report will appear in a separate window in the designated format. This report will describe all changes that will be made to the database if/when accounts are created.
11. Once the Mass Account Creation Detail Report has been reviewed and verified, select the **Create** button to initiate creation of accounts. The Mass Account Detail Report will appear again, describing all changes made within Campus.

Mass Account Creation Fields - Individual Accounts

The following table defines each available field.

Field	Description
Account Type	The type of POS account created. To create individual accounts, select the Individual option.
Patron Type	<ul style="list-style-type: none"> • Student - This option will create accounts for students with an enrollment in the School Year where no enrollment End Date exists and for any students with future dated enrollments. • Staff - This option will create accounts for staff members who have District Assignment employment records for the school(s) selected where no End Date is present. • Students and Staff - This option will create accounts for students with an enrollment in the School Year where no enrollment End Date exists and for any students with future dated enrollments. This option will also create accounts for staff members who have District Assignment employment records for the school(s) selected where no End Date is present.
Include District Only Staff	This option will create accounts for staff members with District Employment records where no End Date is present. This option is only available if a Patron Type of Staff or Students and Staff is selected.
Ad Hoc Filter	<p>Selection of an Ad hoc filter limits the eligible patrons to those listed in the filter results based on current enrollment or current active employment records (where no End Date is entered). This option overrides the Patron Type selected.</p> <p>If the Include District Only Staff is marked and an Ad Hoc Filter is selected, staff members within the Ad hoc filter with a District Assignment record will report.</p>
School	Only people in the School with an active enrollment or District Assignment record are included. This field defaults to the school selected in the Campus toolbar.

Field	Description
School Year	Only people with an enrollment record in this year (or a subsequent year with no End Date entered) are included. This field defaults to the year selected in the Campus toolbar.
Grade	The grade level of the students for which to create accounts.
Generate PIN	If marked, PINs are created and assigned to created accounts. This option is limited based on preferences set in the PIN Auto Gen Preferences tool.
Report Format	Designates the format for the Mass Account Creation Detail Report. Users are encouraged to use the CSV format when creating a large amount of accounts.
Test	Initiates a test view of the Mass Account Creation Detail Report, allowing users to view all database changes that will occur. The test version of the Mass Account Creation Detail Report must be run prior to creating accounts.
Create	Initiates creation of POS accounts and generates the Mass Account Creation Detail Report, detailing all changes made to the Campus database.

Mass Account Creation Detail Report - Individual Accounts Example

The Mass Account Creation Detail Report for individual accounts lists all POS accounts created (or will be created) via criteria entered in the Mass Account Creation tool.

24-25
Harrison High
5856 Peachtree Parkway, Metro City MN 55436
Generated on 10/09/2024 02:29:05 PM Page 1 of 18

Mass Account Creation Detail Report

Account Type: Individual Patron Type: student
School: Harrison High Year: 2025
Grade: All Grades Generate PIN: YES

THIS IS A TEST. NO DATA IS WRITTEN TO THE DB.

Summary

New Accounts	
1031	

New accounts

Account#	Student/Staff Number	Patron Name	PIN	Patron Type
7223	031110005	Bauer, Michael	Test	student
6802	045460128	Berger, Zoey Petal	Test	student
6430	668538	Blaha, Ashley Christine	Test	student
6750	035460049	Blaha, Danah	Test	student
7003	665048	Carpenter, Seth	Test	student
6929	045460057	Cooper, Dorborwulu	Test	student
6356	923	Earl, Katinet	Test	student

Mass Account Creation Detail Report - Test Report

Report Section	Description
Summary	Describes how many new POS accounts were created.

Report Section	Description
New Accounts	Lists all new POS accounts created and corresponding patron information.

Create Family Accounts

Family accounts can be created for students and staff members en masse. This tool will also add patrons to existing family accounts. Family accounts are created and assigned based on [active primary Household membership](#) for students with an active enrollment record and active staff members.

This tool is most effective for creating new accounts for the next school year for new incoming students and staff. If this tool is used for a past school year, accounts could be created for students who are no longer enrolled in the district (if the district has failed to include an End Date on their enrollment record(s)).

The user responsible for creating accounts for patrons in the district should have at least [RWA tool rights](#) for the Mass Account Creation tool.

Mass Account Creation

Family accounts are created based on patrons active primary household membership. Student patrons must have a current active enrollment or future dated enrollment. Staff patrons must have an active District Employment and/or District Assignment Record. Select Test to preview accounts before selecting Create.

Account Type	Family Account
Patron Type	<input checked="" type="radio"/> Students <input type="radio"/> Staff <input type="radio"/> Students and Staff
Add new patrons to existing accounts? <input checked="" type="checkbox"/>	
Ad Hoc Filter	<input type="button"/>
School	All Schools
School Year	18-19
Grade	All
Generate PIN	<input checked="" type="checkbox"/>
When creating student accounts, uncheck Generate PIN if using Student # as PIN feature.	
Report Format	<input checked="" type="radio"/> PDF <input type="radio"/> CSV
<input type="button"/> Test <input type="button"/> Create	

Mass Account Creation - Family Account

1. Select an **Account Type** of Family Account.
2. Select the **Patron Type**.
3. Mark the **Include District Only Staff** checkbox to create accounts for staff members with [District Employment](#) records where no End Date is present.
4. Mark the **Add new patrons to existing accounts** checkbox to have patrons added to their household's family account (if the person is within a household which has a family account).
5. Select an **Ad Hoc Filter** to create accounts for a specific demographic of people (if desired). [Ad Hoc filters](#) should be reviewed for accuracy prior to use.
6. Select the **School** for which to create accounts. Only people in the school with an active

enrollment or [District Assignment](#) record are included. This field defaults to the school selected in the Campus toolbar.

7. Select the **School Year** for which to create accounts. Only people with an enrollment record in this year (or a subsequent year with no End Date entered) are included. This field defaults to the year selected in the Campus toolbar.
8. Select the **Grade** level of the student for which to create accounts.
9. Mark the **Generate PIN** checkbox to have PINs created and assigned to created accounts.

If your district used the [Set Student Number as PIN Wizard](#) or has the *Auto creation of PIN - Use Student Number as PIN POS Preference* turned on, you must clear the **Generate PIN** checkbox because PINs already exist.

10. Select the **Report Format**.
11. Select the **Test** button. The Mass Account Creation Detail Report will appear in a separate window in the designated format. This report will describe all changes that will be made to the database if/when accounts are created.
12. Once the Mass Account Creation Detail Report has been reviewed and verified, select the **Create** button to initiate creation of accounts. The Mass Account Detail Report will appear again, describing all changes made within Campus.

Mass Account Creation Fields - Family Account

The following table defines each available field.

Field	Description
Account Type	The type of POS account created. To create family accounts, select the Family Account option.
Patron Type	<ul style="list-style-type: none">• Student - This option will create accounts for students with an enrollment in the School Year where no enrollment End Date exists and for any students with future dated enrollments.• Staff - This option will create accounts for staff members who have District Assignment employment records for the school(s) selected where no End Date is present.• Students and Staff - This option will create accounts for students with an enrollment in the School Year where no enrollment End Date exists and for any students with future dated enrollments. This option will also create accounts for staff members who have District Assignment employment records for the school(s) selected where no End Date is present.

Field	Description
Include District Only Staff	This option will create accounts for staff members with District Employment records where no End Date is present. This option is only available if a Patron Type of Staff or Students and Staff is selected.
Add new patrons to existing accounts	<p>If marked, the tool will look at the patron's primary household membership and any existing accounts where other primary members of the same household have an existing account and add the patron into that account. If a scenario exists where more than one family account is tied to a household, the tool will look for the latest (most recent) account created and assign the patron to that account (based on accountID).</p> <p>If unmarked, the tool will look at all patrons' primary household memberships and create new family accounts for any new patrons. This may result in multiple family accounts associated with a household.</p>
Ad Hoc Filter	<p>Selection of an Ad hoc filter limits the eligible patrons to those listed in the filter results based on current enrollment or current active employment records (where no End Date is entered). This option overrides the Patron Type selected.</p> <p>If the Include District Only Staff is marked and an Ad Hoc Filter is selected, staff members within the Ad hoc filter with a District Assignment record will report.</p>
School	Only people in the School with an active enrollment or District Assignment record are included. This field defaults to the school selected in the Campus toolbar.
School Year	Only people with an enrollment or District Assignment record in this year (or a subsequent year with no End Date entered) are included. This field defaults to the year selected in the Campus toolbar.
Grade	The grade level of the students for which to create accounts.
Generate PIN	If marked, PINs are created and assigned to created accounts. This option is limited based on preferences set in the PIN Auto Gen Preferences tool.
Report Format	Designates the format for the Mass Account Creation Detail Report. Users are encouraged to use the CSV format when creating a large amount of accounts.
Test	Initiates a test view of the Mass Account Creation Detail Report, allowing users to view all database changes that will occur. The test version of the Mass Account Creation Detail Report must be run prior to creating accounts.
Create	Initiates creation of POS accounts and generates the Mass Account Creation Detail Report, detailing all changes made to the Campus database.

Mass Account Creation Detail Report - Family Account Example

The Mass Account Creation Detail Report for family accounts lists all new family accounts created,

all patrons added to existing family accounts and any patrons who have issues with their household membership and/or POS account.

24-25 Harrison High 5856 Peachtree Parkway, Metro City MN 55436 Generated on 10/09/2024 02:30:11 PM Page 1 of 18	Mass Account Creation Detail Report Account Type: Family Patron Type: student School: Harrison High Year: 2025 Grade: All Grades Generate PIN: YES
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THIS IS A TEST. NO DATA IS WRITTEN TO THE DB.

Summary

New Family Accounts	Patrons Added to New Accounts	Patrons Added to Existing Accounts	Patrons with Primary Member/Account Issues
643	776	255	0

New accounts

Account#	Student/Staff Number	Household Name	Patron Name	PIN	Patron Type
6272	045460032		Odeh, Yasmin Ibrahim	Test	student
6273	030230132		Totimeh, Williams S	Test	student
6275	035460010		Grundtner, Gavin H	Test	student
6276	666060		Haggar, Alexandra	Test	student
	035460038		Haggar, Nicholas	Test	student
6278	045460057		Cooper, Dorborwulu	Test	student
6279	045460060		Jaywheh, Barwulu	Test	student

Mass Account Creation Detail Report Example

Report Section	Description
Summary	Describes how many new family accounts were created, how many patrons were added to new accounts, how many patrons were added to existing accounts and how many patrons have issues with their household memberships and/or POS account.

Report Section	Description
New Accounts	<p>Lists all patrons assigned new POS accounts.</p> <ul style="list-style-type: none"> • Account#: Reports the account number for the new account created for the patron. A new individual account is created for patrons who are not a member of any household and/or patrons who are only marked as Secondary members of a household(s). • Student/Staff Number: Reports the Local Student Number or Local Staff Number of the patron. • Household Name: Reports the name of the patron's household. If the patron is not assigned to any household or is only a Secondary member of one or more households, this column will say "No Primary Household". <div style="border: 1px solid #f0e68c; padding: 10px; margin-top: 10px;"> <p>If the Household Name is not populated for the household on the Household Info tool, the report will show the Household Name as blank.</p> </div> <ul style="list-style-type: none"> • Patron Name: The name of patron added to the account. • PIN: The PIN tied to the patron's account. If the Generate PIN checkbox is marked on the editor and the Test version of the report is generated, this column will populate with "Test". If the Generate PIN checkbox is unmarked on the editor, this column will report None for both the Test and Create versions of the report. • Patron Type: The type of patron assigned to the account.

Report Section	Description
Patrons Added to Existing Accounts	<p>Lists all patrons added to existing family accounts.</p> <ul style="list-style-type: none"> • Account#: Reports the account number of the existing account to which the patron was added. A new individual account is created for patrons who are not a member of any household and/or patrons who are only marked as Secondary members of a household(s). • Student/Staff Number: Reports the Local Student Number or Local Staff Number of the patron. • Household Name: Reports the household account the patron was added to. <div style="background-color: #ffffcc; padding: 10px; margin-top: 10px;"> <p>If the Household Name is not populated for the household on the Household Info tool, the report will show the Household Name as blank.</p> </div> <ul style="list-style-type: none"> • Patron Name: The name of patron added to the account. • PIN: The PIN tied to the patron's account. If the Generate PIN checkbox is marked on the editor and the Test version of the report is generated, this column will populate with "Test". If the Generate PIN checkbox is unmarked on the editor, this column will report None for both the Test and Create versions of the report. • Patron Type: The type of patron assigned to the account.

Report Section	Description
Patrons with Household Primary Member/Account Issues	<p>Lists all patrons who have issues with their household membership and/or POS account.</p> <p>This section of the report should be reviewed thoroughly when the Test report is generated. This information should be used to make corrections to Households before creating accounts.</p> <ul style="list-style-type: none"> Account#: Reports either the new account created for the patron or the existing account to which the patron was added. A new individual account is created for patrons who are not a member of any household and/or patrons who are only marked as Secondary members of a household(s). Student/Staff Number: Reports the Local Student Number or Local Staff Number of the patron. Household Name: Reports the household account the patron was added to. <p>If the Household Name is not populated for the household on the Household Info tool, the report will show the Household Name as blank.</p> <ul style="list-style-type: none"> Patron Name: The name of patron added to the account. PIN: The PIN tied to the patron's account. If the Generate PIN checkbox is marked on the editor and the Test version of the report is generated, this column will populate with "Test". If the Generate PIN checkbox is unmarked on the editor, this column will report None for both the Test and Create versions of the report. Patron Type: The type of patron assigned to the account.