

Add Account (POS)

Last Modified on 03/11/2024 8:45 am CDT

[Add Account](#) [Create POS Accounts for a Person](#) | [Create POS Accounts for a Household](#)

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

Classic View: Point of Sale > Account Maintenance > Add Account

Search Terms: Add Account

The Add Account wizard allows districts to add POS accounts for new students and families moving to the district. Accounts can be added by household or by person. The household or person must already exist in Campus before a POS account can be added for them.

What can I do?

- [Create POS Accounts for a Person](#)
- [Create POS Accounts for a Household](#)

Users wanting to create person and family POS accounts en masse should use the [Mass Account Creation Wizard](#).

Add Account ☆
[Food Service](#) > [Wizards](#) > Add Account

Person/Household Search

Person/Household Search
 Search for a person or household already tracked in Campus. After searching, select a person or household from the list or click on Create New Account.

Search

By Household Person

*Last Name

First Name

Middle Name

Birth Date

Gender

Add Account

Create POS Accounts for a Person

Before an account can be created for a person, a search must be done to assist in locating the correct person as well as ensuring the person exists within Campus.

Add Account ☆
Food Service > Wizards > Add Account

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Search for a person or household already tracked in Campus. After searching, select a person or household from the list or click on Create New Account.

Search By

Household Person

*Last Name

First Name

Middle Name

Birth Date

Gender

Details		Alborough, Callum PersonID: 3826	M		
Details		Alborough, Ciro PersonID: 3824	103824	M	03/08/2003
Details		Alborough, Dallas PersonID: 49505	109301	M	01/01/2005
Details		Alborough, Greg PersonID: 3823	103823	M	03/09/2000
Details		Alborough, Harley PersonID: 3825	103825	M	09/12/2002
Details		Alborough, Pauline PersonID: 3822		F	12/31/1973

Searching for a Person

To search and begin creating an account for a person:

1. Select the **Person** radio button.
2. Enter at least the **Last Name** of the person. Additional search criteria may be entered within the available search fields.
3. Select the **Search** button. People matching search criteria will appear in a window on the right.
4. Select the person being assigned a new account.

Result

The Account Creation screen displays.

Add Account ☆
Food Service > Wizards > Add Account

Account Creation

Account Creation
Select all individuals to create accounts and account type. This will create each new individual or family account.

People
<input checked="" type="checkbox"/> Alborough, Callum

5. Mark the checkbox next to person's name and select the **Save** button.

Result

If an account already exists for the person, the following error displays: *Unable to create accounts, because one or more of the selected individual already has a valid account.*

Otherwise, if an account did not already exist, the Account Info tab displays. A new account has been created for the person and additional account information can be entered by

selecting the Account and name of the user within the Account info window. See the [Account Info](#) article for more information about using the Account Info tab.

An Account PIN must be established before a patron can use a Point of Sale terminal.

Account Details ☆
Food Service > Information > Account Details

Account 5753

Save

Account Info

- Account
 - Abegg, Colton

Point of Sale Identification - Abegg, Colton

Cashier PIN	<input type="checkbox"/>	Auto Gen	<input type="checkbox"/>	Manager PIN	<input type="checkbox"/>	Auto Gen	<input type="checkbox"/>	Account PIN	<input type="checkbox"/>
<input type="text"/>		<input type="text"/>		<input type="text"/>		<input type="text" value="3972"/>		<input type="text" value="3972"/>	

Location School:

District Wide:

Patron Preference

Block Check Deposit	<input type="checkbox"/>	Block Ala Carte	<input type="checkbox"/>	Block Concessions	<input type="checkbox"/>	Single Purchasable Restriction	<input type="checkbox"/>	Daily Limit	<input type="text" value="0.00"/>
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Notes

POS Display Comments

- Modified by: Administrator, ASystem 12/10/19 15:49

Create POS Accounts for a Household

If your district uses Household Food Service accounts and Online Payments, only set up one [Food Service Fund account](#). This allows Campus to identify the correct Fund Account when there are multiple enrollments associated with an account.

Before family or individual accounts can be created for a household, a search must be done to locate the household and ensure the household exists within Campus.

Add Account ☆

[Food Service](#) > [Wizards](#) > [Add Account](#)

Person/Household Search

Person/Household Search
Search for a person or household already tracked in Campus. After searching, select a person or household from the list or click on Create New Account.

Search

By Household Person

Last Name

First Name

Student #

Birth Date

Number

Street

Apt #

Household Name

Phone

Household	Household Address
Household	4425 Washington St NE Blaine
Jones, Andrew J	782 66th Avenue N Blaine
Household	1674 68th Ave NE Blaine
Jones, Steven A	
Jones, ZaKhia A	
Fletcher, De'Ja S	
Whittler, Kariona S	
Household	549 Ely St NE Blaine
Jones, Terry L	
Jones, DeAndre R	
...	5688 Arthur St NE Blaine

Searching for a Household

1. Select the **Household** radio button.
2. Enter search criteria in at least one available search field.
3. Select the **Search** button. Search results will appear in a window on the right.
4. Select the household to create a household account. You will be directed to a new editor.

Account Creation

Account Creation
Select all individuals to create accounts and account type. This will create each new individual or family account.

People

Whittler, Kariona S

Fletcher, De'Ja Sharion

Jones, ZaKhia Akasha (09/01/2007)

Family Individual

Terminal Manager

If individual accounts should be created for each selected person:

1. Check the checkbox next to each person that should have an account created.
2. Select the **Individual** radio button.

3. Select the **Save** icon.

If a Family account should be created for the household:

1. Check the checkbox next to each person who should be tied to the household account.
2. Select the **Family** radio button.
3. Select the **Save** icon.

You will be directed to the Account Info tab.

Account Details ☆
Food Service > Information > Account Details

Account 5967

Save
Add Patron

Account Info

- Account
 - Fletcher, De'Ja Sharion
 - Jones, ZaKhia Akasha
 - Whittler, Kariona S

Account Detail

Number	Active	Reminder Enable	Reminder
5967	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0.00

New Family Account

In the example above, a family account was created which only includes Ernie and Kermit for the Teststudent household.

A new account has been created for each person (or a Family Account has been created) and additional account information can be entered by selecting the Account and name of the user within the Account info window. See the [Account Info](#) article for more information about using the Account Info tab.