

Add Account (POS)

Last Modified on 10/22/2022 9:51 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](#).

☰
20-21 K

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.

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

<input type="button" value="Details"/>	Tester, Core	M	
	PersonID: 57494		
<input type="button" value="Details"/>	Tester, Elizabeth	012000033F	08/16/1983
	PersonID: 24308		
<input type="button" value="Details"/>	Tester, John D	M	06/28/1977
	PersonID: 39664		
<input type="button" value="Details"/>	Tester, Joseph A	090050271M	07/28/2005
	PersonID: 42619		
<input type="button" value="Details"/>	Tester, Nicole R	119490002F	01/01/1972
	PersonID: 14016		
<input type="button" value="Details"/>	Tester, rwa	M	
	PersonID: 58135		

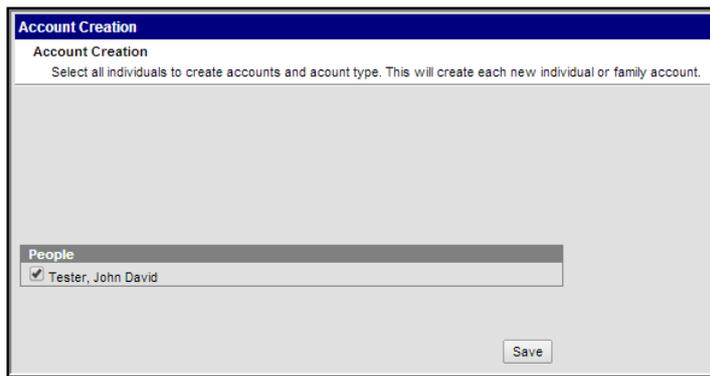
Searching for a Person

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.



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.

☰
Infinite Campus

Account Details ☆

Food Service > Information > Account Details

Save

Account Info

- Account
 - Smith, Shayla Lynae

Point of Sale Identification - Smith, Shayla Lynae

Cashier PIN	Auto Gen	Manager PIN	Auto Gen	Account PIN	Auto Gen
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text" value="431752"/>	<input type="checkbox"/>

Location School:

District Wide:

Patron Preference

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

Comments:

- Modified by: account, admin 08/21/20 11:07

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.

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
SIS Teststudent	9876 Any Street SW #9 Ar
Household1	
SIS Teststudent, Peggy	
SIS Teststudent, Ernie	
SIS Teststudent, Kermit	
SIS Testparent, Mary	
SIS Teststudent	9876 Any Street SW #9 Ar
Household3	
SIS Teststudent, Oscar	
SIS Teststudent, Natalie	
SIS Teststudent, Jesse	

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

SIS Teststudent, Kermit (04/03/1995)

SIS Teststudent, Peggy (09/01/2004)

SIS Teststudent, Ernie (09/21/1998)

SIS Testparent, Mary (01/01/1974)

Tester, Nicole Rufayel (01/01/1972)

Family Individual

Terminal Manager

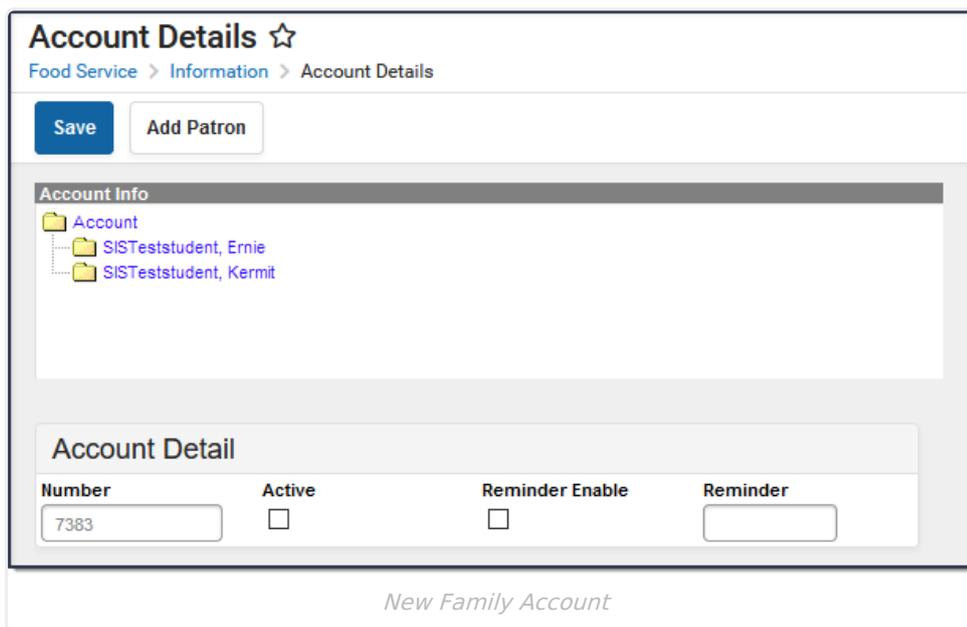
If individual accounts should be created for each selected person:

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.



The screenshot shows the 'Account Details' page for a 'Food Service' account. At the top, there are 'Save' and 'Add Patron' buttons. Below is the 'Account Info' section, which displays a tree view of the account structure: 'Account' (parent) containing 'SISTeststudent, Ernie' and 'SISTeststudent, Kermit' (children). At the bottom, the 'Account Detail' section contains a table with the following data:

Number	Active	Reminder Enable	Reminder
7383	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

Below the table, the text 'New Family Account' is displayed.

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.