

Portal Account Creation: Letters

Writing a Letter:

User Management>User Account Administration>User Account Letter Designer

1. Using the User Account Letter Designer, build a letter for how parents/guardians can activate their account. See letter example below.
2. Please edit anything in **YELLOW** to your specific district information
3. Please insert a Campus Field to match anything in **GREEN** found in the editor.
4. Can't find your Infinite Campus Portal URL? [Go here.](#)

Sending a Letter:

Reporting>Filter Designer

Before sending a letter, you must first build an Ad-Hoc in the Filter Designer to find the parent/guardians of students who have do not have a portal account, but have "portal" checked on their relationship preferences.

1. Select the appropriate calendar or all schools in the context at the top.
2. Go to Ad Hoc Reporting>Filter Designer
3. Select Filter Type to Pass-Through SQL Query and Data Type to Student (see image)
4. [Navigate to this link](#) for the exact filter to use. Copy Box A and B fields directly into the Query.
5. Hit Test and then Save.

Printing a Letter:

User Management>User Account Administration>User Account Letter Builder

1. To print the letter, use the User Account Letter Builder to select the letter you built along with the audience to send to.
 - a. Select saved account activation letter, filter type (set to Guardians of Students...), and set URL Expiration Date (see image)
 - b. On the left hand side, choose the SQL Query you built (in step above) to find parents.
 - c. Select Build Letters

Portal Account Creation: Messages

IMPORTANT: A reminder that for an email to be sent, a parent/guardian must have “Guardian, Portal and Messenger” checked in the Relationship Preferences next to a student. (Census>Relationships)

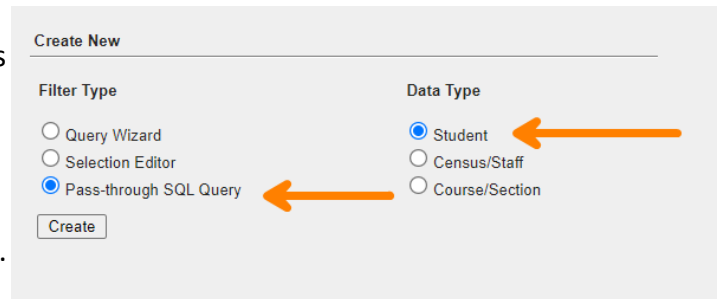
They must also have an email address along with Messenger Contact Preferences in their Demographics page (Census>Demographics)

Sending a Message:

Reporting>Filter Designer

Before sending a message, you must first build an Ad-Hoc in the Filter Designer to find the parent/guardians of students who have do not have a portal account, but have “portal” checked on their relationship preferences.

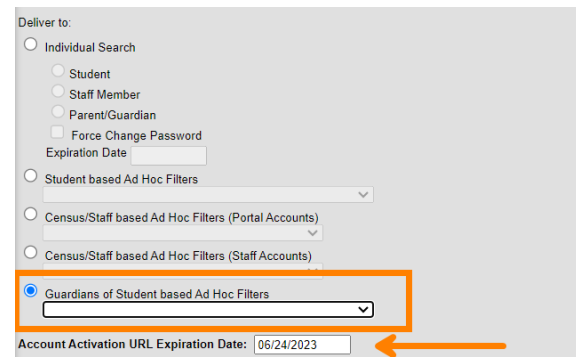
1. Select the appropriate calendar, or all schools in the context.
2. Go to Ad Hoc Reporting>Filter Designer
3. Select Filter Type to Pass-Through SQL Query and Data Type to Student (see image)
4. [Navigate to this link](#) for the exact filter to use. Copy Box A and B fields directly into the Query.
5. Hit Test and then Save.



Creating the Message:

User Management>User Account Administration>User Account Messenger

1. Select the appropriate calendar, or all schools in the context for who this message will be sent to.
2. Using the User Account Mesenger, select who you want the message delivered to...
 - a. Choose “Guardians of Student Based Ad Hoc Filters” at the bottom.
 - b. Select the SQL Query you built (in step above) from the dropdown.
 - c. Set the URL Expiration Date (specific to the unique URL)



Writing the Message:

1. Using the WYSIWYG editor, build an email for how parents/guardians can activate their account. See message example below.
2. Please edit anything in **YELLOW** to your specific district information
3. Please insert Campus Fields to match anything in **GREEN** found in the editor.
4. Can't find your Infinite Campus Portal URL? [Go here.](#)

Saving the Message:

1. Once you have completed creating your message, hit **SAVE** at the top of the page to save the template. You can now use this across calendars.
2. From there, either Preview/Send or navigate to the [User Account Messenger Scheduler](#)

Scheduling the Message:

User Management>User Account Administration>User Account Messenger Scheduler

1. Using the User Account Messenger Scheduler, you can schedule the message for parents to create portal accounts.
2. Select the message you built and saved (in step above)
3. Fill in required fields such as schedule name, calendar, date and time.
4. On the right hand side, set the reoccurring frequency to be how often you'd like parent/guardians to receive the message. This will **ONLY** send again to those who have not yet activated their account.
5. Disable the message scheduled when no longer needed.

SAMPLE Portal Letter/Email format to make into your own.

Dear {recipient.firstName} {recipient.lastName},

In an effort to have effective and efficient communication with our parents, DISTRICT NAME will be utilizing Infinite Campus, our NEW student information system platform we'll be using. We encourage you to use the instructions below to create your parent portal account to begin the process. If you do not have access to a device to electronically verify your child's forms, devices and assistance will be made available at school sites.

Please click on this unique URL to complete the setup of your account. This works best from a computer. Once you click on the URL, you must IMMEDIATELY complete the process.

{accountManagement.uniqueLinkActivationURL}

The URL will expire on {accountManagement.uniqueLinkExpirationDate}

IF the above link does NOT work, PLEASE use the following steps to complete the setup of your account:

1. Click on this link [Parent Portal Link \(Add your district's Parent Portal URL\)](#)
2. Click on the New User? at the bottom of the login in area
3. Enter this Activation Key {accountMangement.personGUID}
4. Create your username and password

It will ask you to create a username and password (please remember these credentials). The next screen will ask you to enter your email address 2 times and the password that you selected. You will have to check your email to verify the email address.

Please create your account and update your information as soon as possible, as critical information about the start of the school year will be communicated through your Portal Account.

Please make sure to bookmark the Campus Portal Address, insert your district PORTAL URL, so that you can return to it later or you can download the Campus Parent App in the Apple App Store or Google Play Store.

If you have any questions, please contact your school office for assistance.