

<https://www.charmsoffice.com/>

In the upper right corner, choose "login"

In the new page, go to the second / lower box where it says: Parents/Students/Members and enter the school code: eldoradoband

If you forget the school code, there is an access link you can click on and follow the questions: State, City, Schoo (California, Placentia, El Dorado Band Boosters) and it will give you the code above.

After inputting the code, click in the green box that says: "Enter Student / Parent Area"

You should now see a box that says "student area password". For the initial entry, this code is the same as the student's ID. (PYLUSD ID #) (After logging in for the first time, you may update your password information.)

Input the student ID and enter.

You will now see a screen that says: Please change your charms password.... Please complete the requested information in each box (ID number, new password, confirmed new password, password hint) and click "change password".

You should now be at a page with multiple icons where you can check out the calendar, event list, email staff, see handouts and files, check finances and update info. For those with multiple students, you can link their pages.

Please go into the "update info." icon in the lower left corner and update your contact information:

Update the Student address, phone and email. Add an a new adult or two (each parent) Please be sure not to change the student name when inputting adult info. Please make sure to be on the correct screen.

After updating the info., please click the green "update" box in the upper right corner.

You may browse the finance page and any other pages (icons) and review your information. Initially, this may be a little difficult to understand. This is not always the easiest program to understand, so please let us know if you have any questions – or if you feel something is incorrect. Also, please note that sometimes expenses may change, as we are informed that students are purchasing certain items not presently noted. Also, jazz students, winter drumline and winter guard student accounts may continue to change since their student information is not often known until further into the season.

As you view your student's financial page, you will note 3 main sections: The main overview totals, the fixed payment detail section and the misc. ledger detail section. (We are not currently using the trip (non-Hawaii years) or fundraising ledgers. Payments or credits for these areas will be included in the misc. ledger detail, if an applicable travel year.

The overview is just that – an overview of the main categories. You will see figures for Fixed Payments and Miscellaneous.

In the second area, you will see the fixed payment detail. Here, you should see the item expenses currently associated with your student. Those paid in full have a "paid date" noted. Those not yet paid in full are noted in red as "not paid".

The next section, you will see the miscellaneous ledger detail. This notes all the payments and transfers (from miscellaneous payments eventually transferred to cover fixed expenses) made on the account. This is where any credits (scrip, extra fundraising...) will be noted as well.

To help clarify a bit on the tracking of financials in CHARMS: students have fixed payments due on items: Fair-share, shoes, show shirts, Under Armour shirts, transportation.... As expenses are covered in full on these items, they are processed in the fixed payments area. Smaller donations, credits, etc. are all processed in the misc. ledger section. This section contains more details on all the transactions overall. Once there are enough funds to cover a particular fixed expense (if not covered in full initially), the money is "transferred" to cover such expense. (Please note that no money is actually transferring at that time, as this program is for tracking purposes only. All funds have previously been allocated and remain in the general bank account for the organization.)

When you close the charms tab, it will automatically log you out. You will need to log in each time you open the tab.

Initially, this may be a little difficult to understand. Please browse through the program and check it out. If you have any questions or concerns, please email me at finance@eldoradoband.com and I will walk you through the program or double-check any potential issues or concerns with our other spreadsheets/data.

Our goal with Charms is to have more access, more communication routes and overall, more information, readily available to each family in regard to their student's expenses associated with and contributions toward the program.

Thank you for your help and cooperation in using this program.

EDHS Band Financial Secretary

(August 2019)

