

<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, School (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 will update this login 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)

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

Please be sure to browse the finance page and any other pages (icons) and review your information. Initially, this may be a little difficult to understand. This is our start-up year for using this program, so we are all working together to make it the easiest and most efficient for everyone. We are still learning how best to use the program to its maximum, so please be patient. We are hoping this program will help us year-after-year to have information on-hand to reduce the need to resubmit some items each year if not required, and to allow families more readily-available access to information. Please let me know if you have any questions or concerns or feel there are any discrepancies. Also, please note that jazz students and drumline / color guard student accounts may continue to change in regard to expenses, as those are still being updated as those seasons progress.

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 yet using the trip or fundraising ledgers. Payments or credits for these areas will be included in the misc. ledger detail.)

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 financials, students have fixed payments due on items: Fairshare, shoes, jazz ties, Under Armour shirts.... As payments in full are made on these items, they are processed in the fixed payments area. Smaller payments, credits, etc. are all processed in the misc. ledger section. This section contains more details on all the transactions overall. Once there is enough misc. funds to cover a fixed expense, the money is transferred to cover such expense. (We are not currently utilizing fundraising and travel in Charm while we navigate the system. These expenses and such are processed in the misc. or fixed payment sections at this time.)

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 account.

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

Kristan Beckman,

EDHS Band Financial Secretary