

CHARMS INSTRUCTIONS

Alpharetta High School Band uses Charms Office Assistant to manage student data, keep track of student finances, collect online payments, and communicate with students and parents. It is important that your/your child's contact information is up-to-date in Charms to ensure that you/they receive important information from Mr. Jenkins, Mr. Kaufman and the Booster Club about the band program.

Please contact the Treasurers at abbatreasurers@gmail.com if you have any questions or need help with Charms.

How to Log In to Charms

1. Go to <https://www.charmsoffice.com/> and click on "Log In" in the upper right corner.
2. Enter the school code: **ALPHARETTAHSBAND** in the "Parents/Students/Members" section (not the "Teacher/Helper" section).

Or use the following link to bypass steps 1 and 2

<https://www.charmsoffice.com/charms/parents.asp?username=AlpharettaHSBand>

3. Enter your password in the "Student Area Password" field.

First Time Users: The initial password will be your child's school ID unless we did not know it at the time the account was created, in which case it will be a randomly generated ID. Please contact one of the Treasurers to give you that ID if your child does not know it

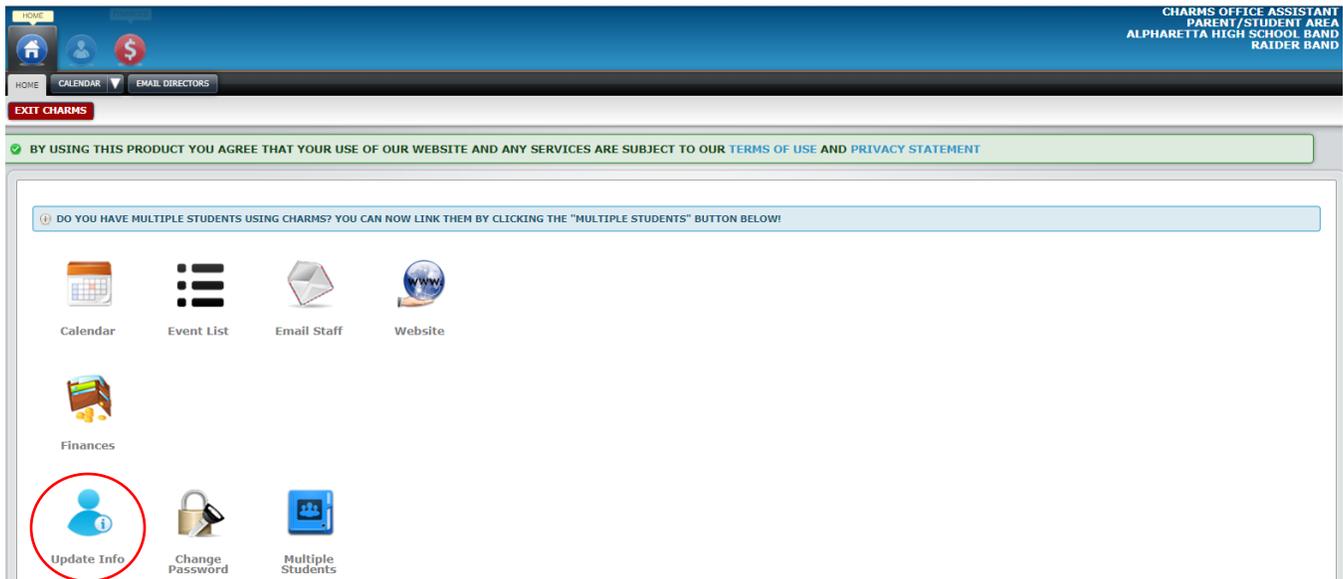
After logging in, you will be prompted to change your password to a new password to be used for future logins. Please note that there is only one password for each account so make sure adults/student agree on a password and let the others know if you change it!

Returning Users: Use the new password that you created the first time you logged in (not the School ID again). Please contact one of the Treasurers if you can't remember the password or are having any trouble logging in.

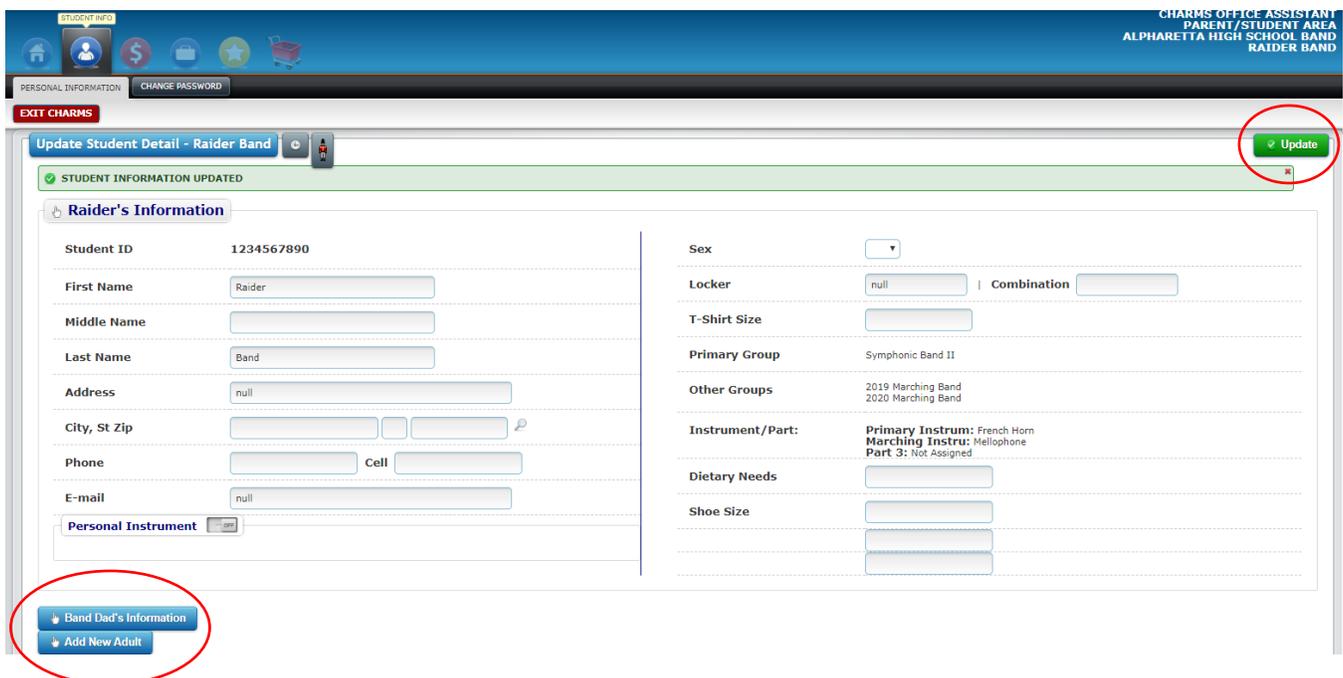
Note: If you accidentally type in the wrong password, Charms will take you to a screen to reset your password. Do not complete this if you want to try and enter your password again. Instead, go to the home page (the house icon in the top left corner) to get back to the password screen.

How to Update Student and Adult Information

1. Go to the home page and click on the "Update Info" icon to update student information.



2. Update/edit student data and then click the green "Update" button in the top right corner. Please fill out all applicable fields on this screen.



3. Click the adult information buttons at the bottom left corner to add/update adult information. Please include all adults who should receive band communications.

Note: If you have multiple students in the band program, you can link their accounts by going to the "Multiple Students" icon on the home page.

How to Make a Payment in Charms

1. Go to the home page and click on the “Wallet” or “\$” icon to get to the Student Financial Statement.
2. Pay a **fixed payment** by clicking on the PayPal tab(s) next to the item(s) you want to pay. (You can pay more than one item at a time). Then click on the “Pay Fixed Payments” button. This will take you to the PayPal website to complete the transaction. If you do not have a PayPal account, you can click on the “Pay with Debit or Credit Card” button on the PayPal website and check out as a guest. Once your transaction is processed, you will return to your Charms account.

Note that Charms does not allow you to make a partial payment for a fixed payment item. If you want to make a partial payment, then do that as a Miscellaneous Payment. Once you have accumulated enough funds in the Miscellaneous Ledger to pay a fixed payment, money will be transferred across by the Treasurers.

3. Make a general or **miscellaneous payment** by clicking on the “Make Miscellaneous Payment” button and then follow the instructions. Please make sure you enter what you are paying for in the “Description” box in PayPal.

Examples of miscellaneous payments are partial fixed payments, lump sum payments, lessons, or really anything that you don’t see a fixed payment for.

The screenshot displays the Charms account interface. At the top, there are navigation icons for Home, Profile, Finance (with a dollar sign icon), Mail, Star, and Shopping Cart. Below these are buttons for 'FINANCIAL STATEMENT' and 'TRANSFER REQUEST'. A red 'EXIT CHARMS' button is also visible.

The main section is titled 'Student Financial Statement'. It contains a table with the following data:

Trip Ledger Balance Credit	0.00	
Fixed Payments Due	32.00	
Fundraising Balance Credit	0.00	
Miscellaneous Balance Due	-50.00	negative amount indicates a balance due.
Store Balance	\$ 0.00	
TOTAL BALANCE DUE	\$ 82.00	

Below this table, it states: "There are no scheduled trips for this student".

The next section is 'Student Fixed Payment Detail' with a 'Pay Fixed Payments' button. It contains a table with the following data:

Paid Date	Item	Amt.	Paid By	Dep. Num
not paid	FCME Box Dinner	7.00	PayPal	
not paid	District and All State Audition 2019 (1)	25.00	PayPal	
Total Fixed Payments Due		\$32.00		
Total Fixed Payments Paid		\$0.00		
Total Unpaid Fixed Payments		\$32.00		

Below this table, it states: "There is no Fundraising Activity".

The final section is 'Student Miscellaneous Ledger Detail' with a 'Make Miscellaneous Payment' button. It contains a table with the following data:

Date	Notes	Amt	Running Balance	Paid By	Dep. Num
5/19/2020	CG Equipment Bag	-50.00	-50.00		
Total		-50.00			

4. Check that the payment that you made shows up in your Charms statement. If not, contact the Treasurers.
5. Funds can be transferred between sibling accounts. Please contact the Treasurers if you would like to do this.