


CHARMS Parent Instructions

We use Charms Office Assistant to give families up to date access to your child's fundraising and fee ledger. In this ledger you will find a record of fundraising totals (updated as we receive information) and also any payments you make to the Band Boosters. You will also be able to request the use of student ledger funds and see deductions for field trips, private lessons, shirt and shoe purchases, and SOSF fees.

If you are a parent that does not fundraise, CHARMS will also be very useful to you. You will find your child's school owned instruments checked out, concert uniform, fees, shoe, glove and shirt purchases and other things that you may need to pay for. The balance due will be updated frequently so you can go here to get information quickly. You will also find a list of instruments and uniform parts that have been checked out to your student.

- Log on to www.charmsoffice.com, and click the “ LOGIN” link - upper right corner
- Click the “PARENT/STUDENT/MEMBERS” tab.
- Login to your child's ledger account using the following School Code: **SunPrairieASBand**
- Click “ENTER PARENT AREA” Button
- **Enter password:** You will enter your child's Student ID NUMBER as a **Student Area Password, the first time only**. The system will automatically prompt you to change the password for future logins.

You are now in the Desktop/Home page of CHARMS. Here are the main features to explore.



- **Review Ledger Funds.** Click the “Finances” icon on the main desktop, or the “\$” tab at the top. This is where you can view fundraising details, credits, and fees.
- **You can request funds in your student's ledger.**

Once you are looking at your student's statement, you'll need to print the first page summary (CTRL+P).

Note: The “Transfer Funds” tab will not work. All requests go directly to the VP Treasurer via email: ledger@spbb.org or to the Band Director.

Field Trip Fee Requests & Jazz Festivals/Clinic -

Staple the statement to the field trip form and return to the Band Director and write on the form how much of your student's funds you want to use toward field trip fees.

- If you are using a partial fundraising payment, please also attach the remaining balance due to the field trip form.

The band director will send a list to the Band Booster Vice Treasurer.

Sound of Sun Prairie Requests -

Your registration packet will provide directions on how to use funds on registration day.

Music Camps, Honor Ensembles, Lessons -

Camps and Lessons must be approved by Band Director.

Two weeks before payment is due provide the following:

- Proof of registration
- Invoice
- Ledger statement

Send a request to the Vice Treasurer at ledger@spbb.org for payment directly to camp/ensemble/lesson teacher.

When Are Funds Available?:


- Fundraising monies are available in Charms as soon as possible, but we do have to wait until we receive payments from our vendors or parents depending on the fundraiser. Some of our fundraisers involve hundreds of checks, so please allow a few days or sometimes up to a couple of weeks for processing. Please remember that all of our chairpersons and board members are volunteers, most with full-time jobs.
- Please be patient as some of these fundraisers involve several steps with several parent volunteers involved, but if you have any questions about a particular fundraiser, please feel free to contact the Band Booster Treasurer at treasurer@spbb.org. He or she will do his or her best to either answer your questions or put you in contact with someone who can.



- **Update Personal Information**

make changes to your child's student information page.

- phone numbers
- email addresses

- Add an "adult" tab for each parent  . Located bottom left

Please enter carefully

- email addresses for each adult that you would want student ledger information emailed to with you concerning Charms.
- Cell phone for each adult, for text messages.



Click the "home" button to take you back to the main desktop. Top left.



Multiple Students

Clicking on this icon allows you to link the sibling accounts. Note they will still have their own individual account, this just allows you to go back and forth between accounts. You are allowed to put all fundraising into one account and use the funds for all siblings.

Please remember that ALL student ledgers zero out at the end of the year to preserve the booster tax exempt status. All requests for ledger use must be made before August 1.