

Startup Guide For An Existing Charms Account

Congratulations on your new position, and on taking over an existing Charms account! Charms is a 24/7 cloud-based website tool, to help you manage almost every aspect of your school program . The account may have been provided to you by your District – in that case, your Administrator should have created a login and password for you – if you don't know it, contact them!

For a quick video overview of the features available to you and your parents/students, go to:

<https://www.youtube.com/watch?v=PAvoR8CgCwg> and

<https://www.youtube.com/watch?v=wFV8cGDsApw>.

The best way to get started using your Charms account is to simply go to www.charmsoffice.com and hit the “ENTER” link, then log in with your username and password in the “Teacher/Helper” login area. You're in!

This Welcome screen has links at the right you can explore later. If there is a blue “Quick Start” button, hit it and do the “Quick Start” procedure to help set up your grade range, profile info, initial student groups, parts list, etc. (Skip step 5 if you are not familiar with data entry on our Excel import templates.) Once the Quick Start is completed, you're ready to work in the various areas. You can also hit “Enter Charms.”

Your post-Welcome screen is always the HUB Icon screen area. Once you're into the main HUB screen, you will see that Charms is arranged in a series of “Area Icons” across the top of the screen, with each area having an array of ‘tabs’ specific to that Area. When you mouse over an Area Icon, the name of that area will pop up.

“Help” files exist for EVERY SCREEN in Charms, through the “?” icon in the upper right. There may also be training videos in the same location. Chat help is also available during regular business hours.

TRAINING MANUALS are in this HUB area – click on the USER MANUALS tab, and the manuals will show as .pdf files in this resources area. You may save them to your computer, or print them out for reference.

Since you're taking over an existing account, there may already be students, parents, instruments, uniforms, financials, and other prior data there – the account may also be in the prior school year. **NOTE: If your account is NOT in the right school year, or you need data removed, (like old students, incorrect inventory, etc.) please contact our Tech Support staff – we can help. 972-485-1912**

To get going with your Charms account, work in the following areas (again, don't forget the help screens, accessed through the red “?” link on any screen):

1) **DELEGATE!** Click the “SETUP” (crossed tools) icon, then go to the HELPERS tab to set up helper logins for your Assistant Directors (give them “ASSISTANT” status), parent boosters, etc. Give them a unique username, and the password of **teacher** and customize their login

for whatever areas of access you wish them to have (either specific areas, ASSISTANT (Director), or ALL ACCESS). Once you have created the helper account, email them their login information; If you don't have "helpers" yet, RECRUIT THEM! Charms is all about spreading out the workload...

2) In the "HUB," click on the blue "Hub Preferences" box to customize your Hub screen, as to what areas are shown in what order on this screen. You start out with all 9 "box" areas activated, but you have the option to turn any of them off, and for those that are to remain turned "on", you select what options show up within them. The "Bookmarks" box can be especially handy, for quick access to frequently visited areas.

3) If you haven't already done this in the QuickStart, work with the **SETUP>Groups** screen to create group names to group/identify your students with, and the **Setup>Parts** area to create instruments, voicings, positions, etc., moving things from the left hand column into the right, and up/down in order. If a part isn't in the left column, create it, then put it into the right column and save your changes – these are the parts/positions for your students/members; Scroll all the way, down though – most parts are in there, some multiple times!

4) Gather your student/member identification data, and have a helper (or you) work with the Student Import Wizard excel template to upload your students – or at least enter one "test" student with the "New Student" function. Find the Import Template by going to the STUDENTS icon, then the black "IMPORT/EXPORT" tab dropdown for "IMPORT TEMPLATE". Download this template (excel file) to your computer. Either enter names and IDs gradually into the template, saving as you go, or enter a few, upload them, then clear out the template and start again with the next group and repeat. Remember to read the specific instructions on working with the import templates, and you can also watch the TRAINING VIDEO by clicking on the blue videocam icon at the upper right of the screen.

Here's a trick to making/entering student info really quickly – Enter just the student's name and ID number, and then leave it to THEM to enter the personal contact information!!! You can assign grade levels and parts with the "global" screens later. Parents can also enter both the student's clothing/uniform sizes and the student's class schedule themselves. This is a great assignment for week 1 of school!

5) Go to the SETUP>Profile>Parents&Student Prefs area. Here you will find your Parent Schoolcode, which they use to access their side of your account. If you want to change this code, you may – **but it must be completely unique in the entire Charms system**. Then download the Parent/Student Information Handout from that same Prefs screen with the **English** or **Spanish** link (also available on your login welcome screen), saving it as a Word document on your computer. Enter your parent Schoolcode into the letter, and print it out to send home for your parents to start using Charms. Lower down on the Charms screen, you can select (turn on or off) the areas you want your parents to be able to work within their student-specific login area. HINT: LOG IN AS A PARENT AND WITH A STUDENT ID, TO SEE WHAT BUTTONS THEY SEE!!!! Some users add their school mascot as a student with an easy-to-remember ID so they can always see what the parents are seeing.

ALSO – Parents/Students/Members have mobile access to their Charms account for iDevices and Android, including use of the recording studio, through the iTunes or Google Play app stores as a FREE download – just search for CHARMS BLUE!

6) Download the Charms Barcode Font to your computer, from the Hub screen “RESOURCES” tab area – move this font file to your WINDOWS /FONTS folder (or SYSTEM/LIBRARY/FONTS on a Mac) on your computer.

7) Work in the calendar area to enter upcoming events and volunteer opportunities – simply click on a date, and the event creation box will pop up. See the Help file on tips for how to post calendar events to public or private calendar access – and remember, you can create automated reminders to go out to your calendar event volunteers!!!;

8) If you’re ready to work with instrument inventory and/or uniforms or library, go back and use the same method as before, using the import wizard templates – AND SPREAD OUT THE WORK TO YOUR HELPERS; **There is a training video on working with the Import Template in every IMPORT/EXPORT tab area – watch it!**

9) Ask your TREASURER to work in the Finances area to set up your bank account(s) and budget categories, and enter any student "beginning balances" that may be applicable into their Miscellaneous Ledgers. There is an Import Wizard for opening balances as well!

10) Set up fixed payments (fees) in the finances area that apply to your students and the various groups.

11) If you're doing fundraisers or trips, start setting them up in the Finances area. See the Help library, or click on the videocam icon for training videos on setting up various types of (merchandise vs. non-merchandise) fundraisers. Fundraising can be tricky – SETUP IS KEY.

12) If you want to set up credit card purchasing for your parents, go to the HUB screen, click the RESOURCES tab, then click the “Accept Credit Cards” white tab, for full instructions.

If you need some help in any particular area, research the Help Library, look for a training video, hit us up on Mr. Blinky if the Live Support button is blinking, or email us, at charmssupport@charmsmusic.com!!!

Thanks, and welcome to the Charms family!

The Charms Team

P.S. – There are webinars to help you learn Charms. Please go to www.charmsoffice.com and click on “attend a webinar”. Please feel free to sign up for as many free webinars as you choose. At each district-wide training we create a “XYZ District Training” account for you to practice on for one full year. Feel free to use that, or our existing “Demo” account if you would like to experiment in one area of Charms without affecting your own account. **Just don’t send emails or make phone/text messages once you get in there, because all the info is pretend...**

P. P. S. – The Charms app is available for both Admins and Parents/Students in the iTunes Store and the Google Play Store. Check it out, on your smartphone / mobile device, by searching for “Charms Mobile” and “Charms Blue” – and they’re FREE!

HOW TO IMPORT STUDENT RECORDS

➤ Using the Import Wizards

- The Import Wizards in Charms allow you to easily transfer any existing data that you may already have stored in another database (Ex: Excel, Access, Filemaker Pro) into your account without having to manually re-enter that information.
- Most areas of Charms have Import Wizards and they are very similar in function, but each one has different required fields. The following areas have Import Wizards:
 - Students
 - Library
 - Inventory
 - Uniforms
 - Uniform Sizes
 - Student Misc. Ledger
 - Opening Balances
- When using all of the Import Wizards it is extremely important that you transfer your information to our template. You cannot delete or rename any of the columns. Do not change the name on the tab at the bottom of the spreadsheet. You may leave any of the non-required columns blank. All required fields are in **RED**.

➤ Student Data Import Wizard

- Before starting the Import, make sure you have completed all of the Set Up items.
- Select SET UP ICON > Profile
 - Set your grade range and click on your update profile button
- Select SET UP ICON > Groups
 - Enter the name for each Group/Class
- Select SET UP ICON > Parts
- Transfer the parts you will be using from the selection list on the left hand side to the right hand side. See Part List setup for additional directions. (Tip: keep ‘Not Assigned’ at the top of your list)
- **WATCH THE TRAINING VIDEO!!!!!!!**

- Now you are ready to download the template
- Go to the Students Icon > Import/Export > Import Wizard
 - Select the Download Template Button
 - Select the SAVE Button
- Select where you want the file saved. (The desktop is usually the best place) Do not change the file name and make sure that it is saved as a Microsoft Excel Workbook. You are now ready to open the template and begin entering your data.
- Each of the columns are already labeled. Columns in RED are **REQUIRED** information.
- Student ID is a required field. The ID number must be at least 5 characters long. Try not to use sequential ID numbers such as 10001, 10002, etc. It is best to use the official district ID number.
- The number in parenthesis in the column headings refers to the maximum length of the field. (Ex: First Name (50) means that you can enter a first name up to 50 characters.)
- If a column heading contains “#”, then that field must contain only numbers.
- Only complete birthdates will be uploaded – Two-Digit Month, Two-Digit Day, and Four-Digit Year. Example: June (06), Twenty Fifth (25), Two-Thousand (2000).
- Use ‘M’ for male student and ‘F’ for female student to indicate gender.
- Refer to the “Parts Codes” tab in the CharmsTemplate.xls worksheet file for the numeric codes for part/instrument. Be sure to check the type code for your Charms account (Band, Orchestra, Choir, or All music).
- The next columns are for the STUDENTS address, phone, cell phone and email.
- The columns Field 1, Field 2, Field 3, and Field 4 are for the four self-defined fields on the screen. You can create the headings for these fields *after* you upload your data on the information screen for any in Charms. These four fields will be visible on the student’s information page and also on the student reports.
- The next columns are for the Adult/Guardian information, and these fields correspond with the first two fields on the student’s information page. You can only import two adults with the wizard.
- Please remember to save your file before you begin the import process. Your file for the Import template **MUST** be in .xls format.
- Your information is now ready to be imported into the Charms System

- Return to the Students Icon > Import/Export > Import Wizard
- Scroll down the page to the Browse Button
- Select the browse button to find the location of the file on your computer
- Select the Import Button
- This will bring up a screen where you can review all the information and check for any errors. Any space with RED lettering needs to be repaired on your Excel file. If you made any changes be sure to save your information. You will need to repeat the steps above and reload your template. Once you are sure all the information is correct select the CONTINUE button.
- When successful, you will be able to click links to:
 - Assign students to classes
 - Check and set up grade levels
 - Check and adjust eligibility
 - Check and adjust gender
 - Assign parts and instruments
 - Adjust student status
- All of these functions can be done at a later date by going to the STUDENT ICON > GLOBALS down to the task you want to perform. Remember that all of the information you have entered can be modified at any time!