Charms Directions

Charms is our comprehensive, cloud-based database for band students and parents. It houses information about students and parents, finances, uniforms, instruments, news, events and our online store. This document will help guide you through accessing Charms, updating and managing your student account(s). The web address is WWW.CHARMSOFFICE.COM .
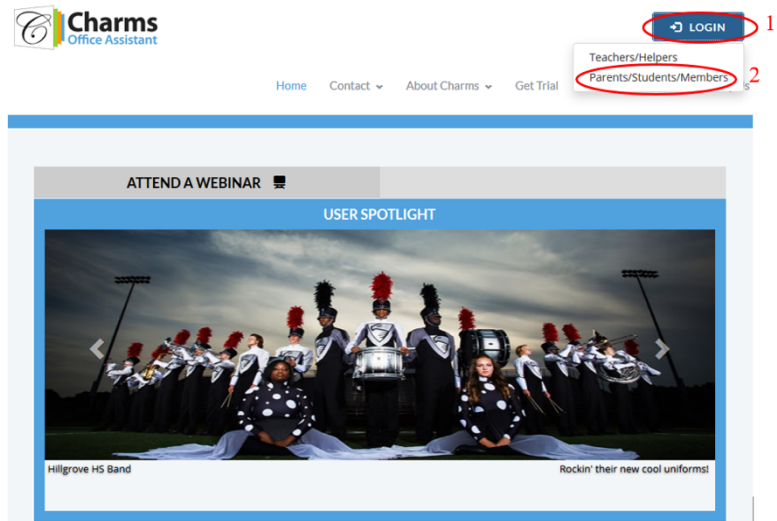
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INITIAL LOGIN (or after a password reset)

Open your internet browser and go to www.charmsoffice.com.

Click **LOGIN** (1) and select **Parents/Students/Members** (2).

Enter our school code **HamptonBands** and **c**lick **Enter Charms**.

Charms assigns each student a unique Charms Student ID. (This is **not** the same as their HTSD ID number.)

Their Charms Student ID is a combination of their first initial, followed by the first six letters of their last name. For example, student Joe Sousaphone would have a the Charms Student ID of **jsousap** .

If a student has a last name with only two letters, Charms adds a "1" (one) to the end, making the ID four characters long.

The first time you log in to your student's Charms account (or after a requested password reset), enter your student's **Charms ID**, in all lower case, as their Student Area Password and click **Enter**.

After entering the **Charms Student ID** as the password, the system requires you to create a new password. Please use the New Password Hint field, to help you recall your password in the future.

If you are still unable to log in, email info@hamptonbands.org. Please note, we can only reset a password back to the student's Charms ID, described above. Once reset, you will need to change the password, again.

CHANGING YOUR PASSWORD

Any time you want to change your password, click on the Change Password icon (padlock & key) on the **HOME** screen.

The Change Student Password window will open. Enter your current password, new password (entered twice) and your hint. When completed, click the **Change Password** button.

HOME SCREEN

From anywhere in Charms, you can return to the Home screen by clicking on the Home icon at the top left corner of the screen.

From the **Home** screen you see all the information available. Take some time to explore.
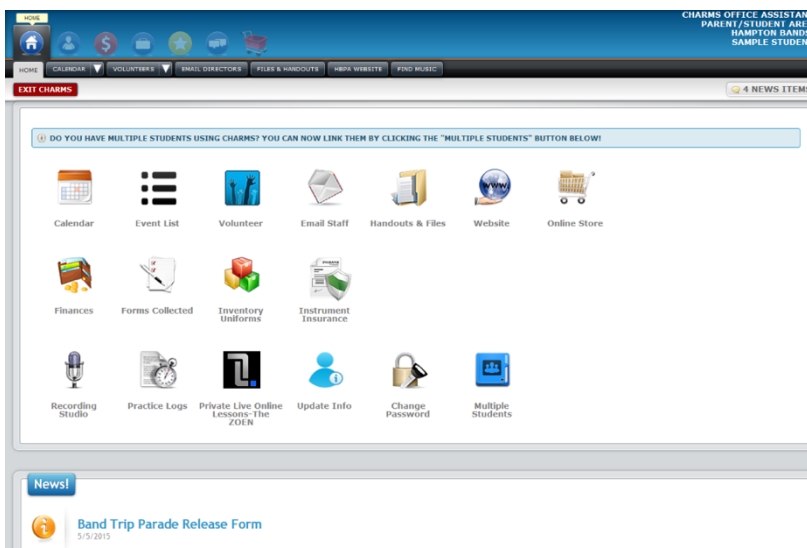
These include:

- **Calendar** – Lists rehearsals, performances, fundraisers, etc.
- **Event List** – Upcoming events
- **Volunteer** – List of events needing volunteers
- **Email Staff** – Email to band staff and HBA officers
- **Handouts & Files** – Download / view forms, manuals and other documentation
- **Website** – Link to HBA website
- **Online Store** – Items required (and optional) for all band students
- **Finances** – Student financial statement (includes store purchases, trip balances and fundraising)
- **Forms Collected** – List of forms mandatory to be turned in and whether they have been turned in
- **Inventory Uniforms** – List of uniform pieces assigned to the student
- **Instrument Insurance** – **Optional** instrument insurance provider
- **Recording Studio** – Online recording studio for students to post playing assignments for evaluation
- **Practice Logs** – **Optional** tool for parents to have students track practice time
- **Update Info** – Student and Parent profile information
- **Change Password** – Used to modify your password and add a password hint
- **Multiple Students** – Used to allow families with multiple band students to have a single login
- **News!** – Import information for upcoming events

STUDENT INFORMATION

> **NOTE:** Information entered is used to contact parents and students throughout the band season. It is critical that <u>you</u> keep this information up to date.

When you log into Charms, it opens the **HOME** page. To update the student information, click on the blue **Update Info** icon.
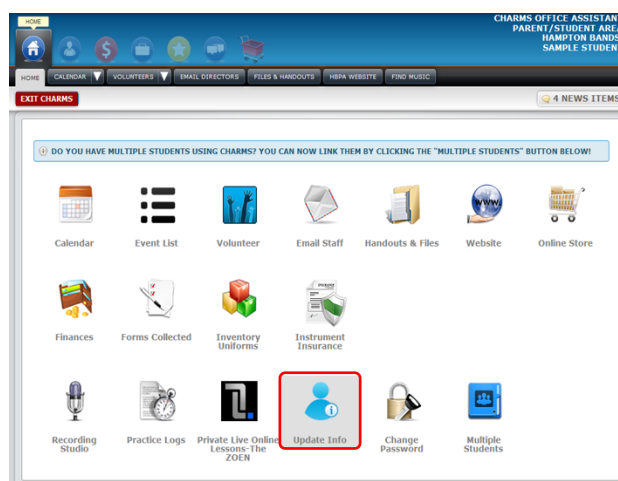
Please verify any existing information. At a minimum, enter or verify your student's name, address, cell phone number, cell carrier and email address. When complete, click the green **Update** button in the upper right corner. You should see a confirmation that the data has been updated.

The medical questions provide basic information. They are Yes / No questions. For HIPAA compliance, please <u>only</u> enter **Y** or **N**. No other information should be entered.

For **Tylenol**, **Ibuprofen** & **Tums**, a "**Y**" indicates you permission for us to provide the medication to your student. An "**N**" or empty field indicates we do not have permission and will not provide the medication.

For **Medical Info**, "**Y**" indicates your student has special medical needs on file with the band. "**N**" indicates your student does not have special medical needs.

ENTER/UPDATE T-SHIRT SIZE

> **NOTE:** **The t-shirt size you enter will be used for both the band show t-shirt, provided at the beginning of the season, and the spring trip t-shirt. Please be sure to update this before the spring trip. If you don't enter a t-shirt size a best guess will be made on your behalf when the shirts are ordered.**

When you log into Charms, it opens the **HOME** page. To update the student information, click on the blue **Update Info** icon.

In the right column, enter your student's t-shirt size in the **T-Shirt Size** field.

Please only enter (S, M, L, XL or XXL).

When complete, click the green **Update** button in the top right corner.

PARENT / GUARDIAN INFORMATION

> **NOTE:** Adult information entered into Charms is used to communicate with parents throughout the band season, including emergencies. It is critical that you keep this information up to date.

> **NOTE:** The first two adults listed are considered <u>emergency contacts</u>. In case of an emergency, we will contact one of the first two adults listed. If either or both of the first two adults are <u>not</u> emergency contacts, please contact info@hamptonbands.org with the names of the adults that are <u>not</u> emergency contacts. We will remove them. When you re-enter them, they will move to the end of the list.
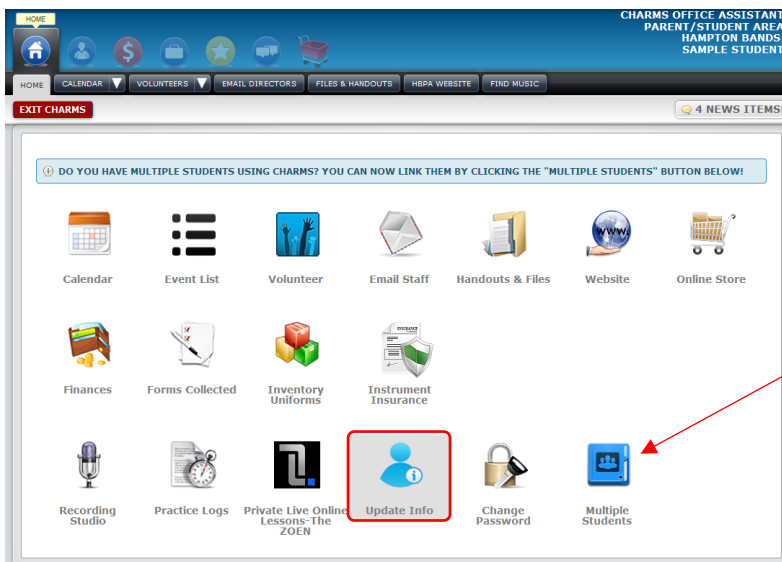
When you log into Charms, it opens the **HOME** page. To update the parent/guardian information, click on the blue **Update Info** icon.

If you have more than one student in the band, please click the Multiple Students icon and follow the on-screen instructions before adding/updating the parent/guardian information. **NOTE:** Both students must complete the initial password setup process <u>before</u> you can link them in Charms.

Add adults / guardians to your student's account by clicking on the [Add New Adult] button in the bottom left corner.

If you added adults previously, click the button with the adult's name, displayed above the [Add New Adult] button.

07/30/2018

Enter or verify adult information for each student. At a minimum please enter name, home phone, cell phone, cell carrier, and your e-mail address.

It is very important that you take a minute and enter or verify all of the adult's information. The contact information entered will be used for all band communications to the adults. When complete, click the green **Update** button in the upper right corner. You should see a confirmation that the data has been updated. You may enter any number of family members, but the first two must be emergency contacts.

INTERESTS / VOLUNTEERS

NOTE: The interest information you enter will be used to contact you for volunteer opportunities.

When you log in to Charms, it opens the **HOME** page. To update **Interests**, click the blue **Update Info** icon and go to the parent/guardian information for the appropriate parent.

Scroll down the list in the Interests box and click on the switch (it turns blue when on) next to the activities that interest you.

You will be contacted by the committee chairperson at the appropriate time.

Volunteers are essential for the continued success of HBA and the band. Thank you in advance for your support!!!!!

DUES & EXPENSES / CHARMS STORE

> **NOTE:** **DUES & EXPENSES ARE MANAGED IN THE CHARMS STORE.** If you are having difficulty adding your dues and expenses to you shopping cart or checking out please contact info@hamptonbands.org.


When you log into Charms, it opens the **HOME** page. To place an order for dues and other expenses, click on the red shopping cart icon for the **ONLINE STORE**.

Scroll down the list of available items and choose items required for your student.

For an example, we will choose the HBA Membership Dues. Click on the green **Choose** button to the right of the HBA Membership Dues item. You will see the item detail screen below.
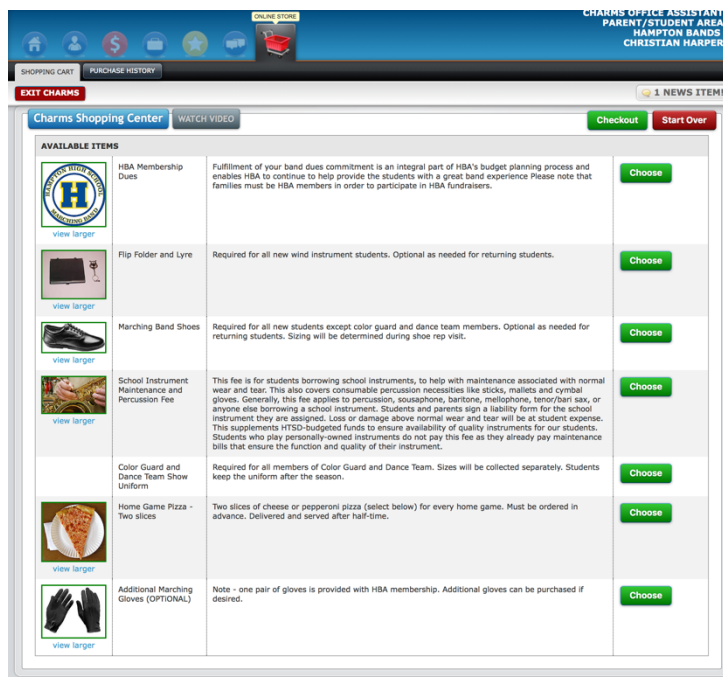
Select the First Student Item by clicking on the **First Student** selection on the left and then clicking on the **No Description** selection on the right to add this to your shopping cart. You will be taken to the quantity entry and Update Cart screen.
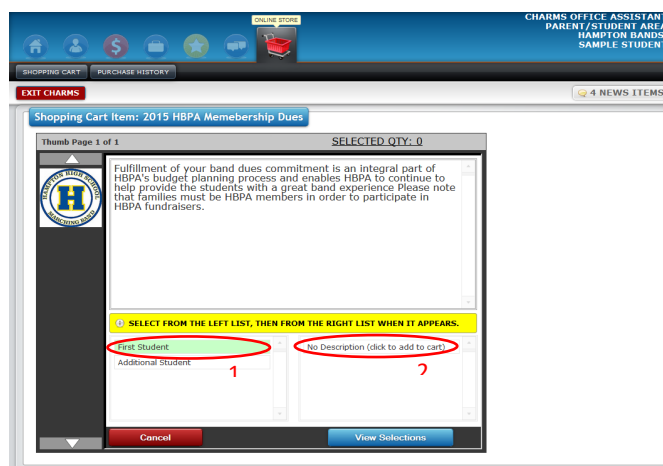
On this screen enter "1" in the Quantity field and click on the green **Update Cart** button. This will add the HBA Membership Dues to your shopping cart and return you to the Available Items screen, below, so you can select other items needed for your student. (Please refer to the item descriptions or the handout from Mr. Himmler if you are not sure what items are required for your student.)

The Available Items screen will display the Selected Items in your shopping cart at the top of the page.

If you need to modify the quantity of an item in your shopping cart click **EDIT**. To remove an item, click **DELETE**. They are to the right of each item

You can now scroll down the list and choose additional items to place in your cart. To keep orders to a minimum, please add all desired items to your cart so you can checkout once for everything you need.

Once you have everything in your cart and you have validated the quantities, please click the green **Checkout** button at the top to proceed to the payment screen.

Next you will select a payment option, either online through **Affinipay** or by check using **Bill and Print**.

NOTE: Affinipay provides a secure online payment by credit or debit card and updates Charms to reflect payment. Bill and Print allows you to pay by check (payable to HBA), sending it with a copy of your order to Mr. Himmler. Charms will usually be updated in 7 to 10 days. It is your responsibility to ensure that your check has been received by checking the financial ledger in Charms. Unfortunately from time to time checks do get misplaced or not turned in.

Once you select a payment option, click on the green **Checkout** button to proceed.

AFFINIPAY (pay by credit or debit card)

If you select Affinipay, you will get the following message informing you that you will be transferred to the Affinipay site to complete the secure payment transaction. (NOTE: Charms does not store any financial payment information (credit card, bank account, etc.). It is handled through Affinipay's secure payment site.

> This will direct you to complete the checkout process using Affinipay.
>
> Cancel   OK

Click on the OK button to proceed.

This will open the Affinipay window with the amount owed for your shopping cart.

If you want to cancel out of the payment, just click your browser's BACK button. It will return you to your shopping cart.

Enter your information in the appropriate fields. When everything is correct, click **Complete Checkout**. NOTE: Your payment will be processed **immediately**.

The following screen will display to confirm your order and payment in Charms.

Order Num	Status	SubTotal	Tax Amount	Handling	Total	Bill Date	Pay Date	Fill Date	
397376	Payment Received(Affinipay)	110.00	0.00	2.20	112.20	07/27/2018	07/27/2018		

BILL & PAY (pay by check)

If you select the Bill and Print payment method and click the **Checkout** button, a pop-up window opens, confirming your order amount and agreement to pay the total price noted in the message.

> By clicking the "OK" button you agree to pay the amount of 100.00.
>
> OK   Cancel

Once you click OK, you will be taken to your Online Purchase History. Click on the magnifying glass to open your bill.

On the order detail page click the Print button in the upper left corner. Write your check, payable to HBA, for the amount shown in the total, paper clip your check to this bill and send them together with your student to Mr. Himmler

Hampton Bands

Online Purchase - Sample Student

(sstuden)

Order Number:						116686
Order Status:						Billed
Date Billed: 05/27/2015						
Order Not Filled						

SELECTED ITEMS

Item	Description/Style	Qty	#Delivered	Price	Amount	Tax
2015 HBPA Memebership Dues	Fulfillment of your band dues commitment is an integral part of HBPA's budget planning process and enables HBPA to continue to help provide the students with a great band experience Please note that families must be HBPA members in order to participate in HBPA fundraisers.					
	First Student	1	0	100.00	100.00	0.000%
				SubTotal:	100.00	
				Tax:	0.00	
				Total:	100.00	

Calendar

NOTE*: HBA uses one calendar for all band activities and events. The same calendar can be found in Charms, on our website (www.hamptonbands.org) and synced to your mobile device (instructions below).
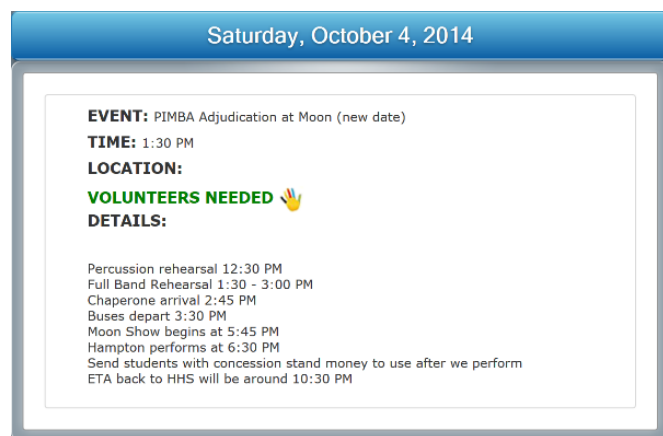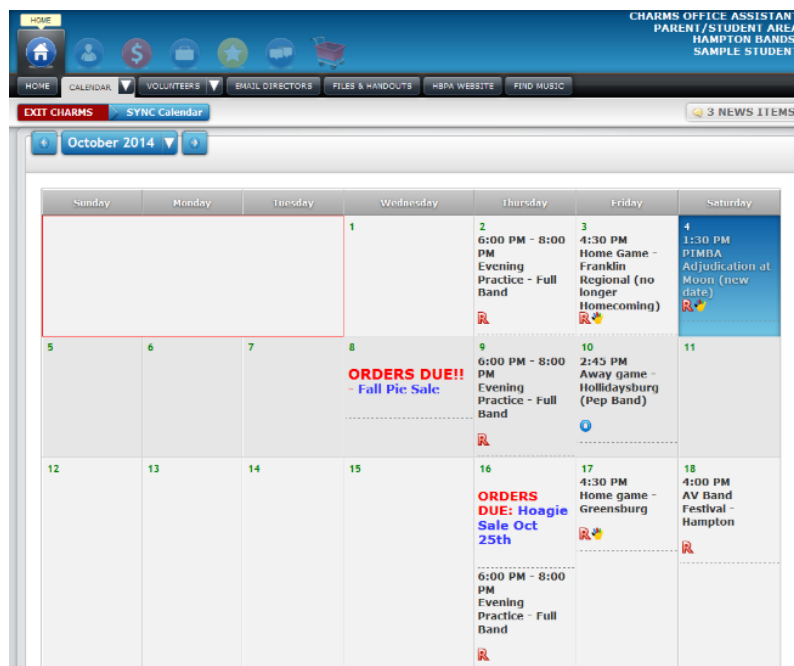
There are three primary icons that provide important information at a glance about any event:

[R] icon indicates the event is REQUIRED for all students. Any exception to this must be discussed with the band director prior to the event.

[O] icon indicates that the event is OPTIONAL.

[hand] icon indicates that volunteers are needed. Clicking on the hand will allow you to see specific jobs and time frames where volunteers are needed. You can fill in the appropriate areas with your information to volunteer.

Clicking on an event on the calendar will open the event details window.

Saturday, October 4, 2014

EVENT: PIMBA Adjudication at Moon (new date)
TIME: 1:30 PM
LOCATION:
VOLUNTEERS NEEDED [hand]
DETAILS:

Percussion rehearsal 12:30 PM
Full Band Rehearsal 1:30 - 3:00 PM
Chaperone arrival 2:45 PM
Buses depart 3:30 PM
Moon Show begins at 5:45 PM
Hampton performs at 6:30 PM
Send students with concession stand money to use after we perform
ETA back to HHS will be around 10:30 PM

The event detail window contains information that is important to know about the event such as:
- start and stop times (if defined)
- location
- times for specific activities during the event
- equipment/uniform requirements
- special instructions about the event
- Volunteers needed

* We do our best to keep you informed through weekly updates of upcoming events! It is important that you stay current on the schedule of events for the band by checking the calendar regularly. The calendar is continuously updated with the current activities and events. We ask you to please check the calendar for the latest updates on all scheduled activities to minimize communications received by the director and staff; and to notify them only of an absence from a specific event or activity.
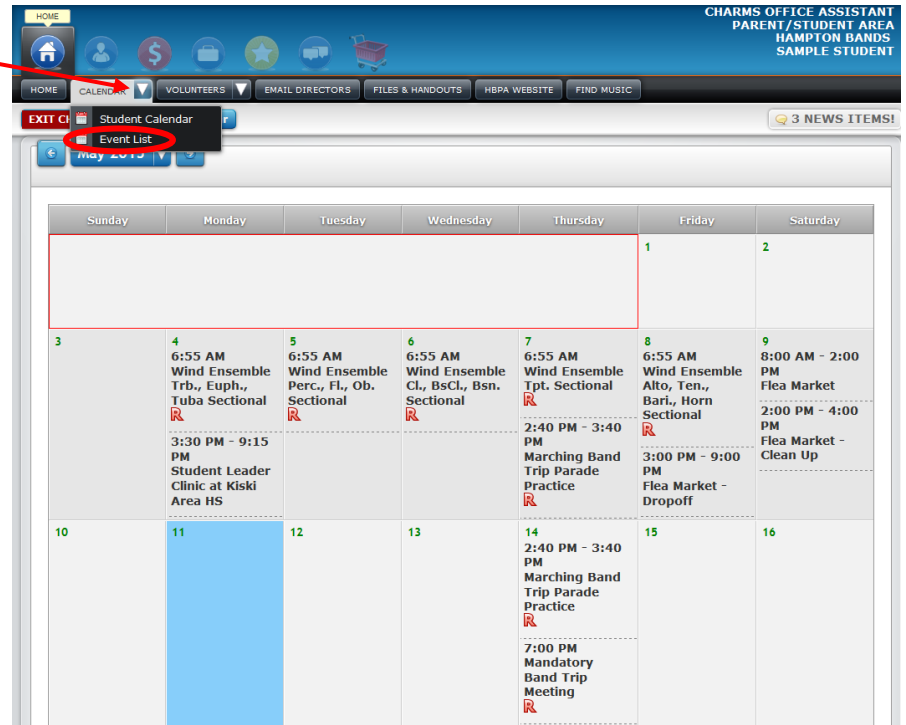
You can click the **Event List** on the Home Screen or, on the **Calendar** page you can click on the drop down triangle to find the Event List option.

The **Event** List will allow you to specify a date range of events and view or print the resulting list of events.

Volunteering: Clicking on the colorful "helping hand" icon will open up the volunteer signup page for the event. The top portion of the window will provide you with important event information and instructions. It is very important to read all of the information in this section prior to signing up.

Scroll through the volunteer positions on the bottom of the screen and look for an open position. If the line item does not contain the Sign Up button, then the spot has been filled already.

There may be specific needs for each event. Please make sure you read the line item description.

Enter the volunteer name, mobile phone and email address, then click the Sign Up button. The screen will repaint with your name indicating you have signed up for that particular spot. (You can only sign up for one spot at a time. If you are signing up for multiple spots, make sure you click the Sign Up button for the 1st spot before entering information for the 2nd spot)

Note: You can go directly to volunteering needs from the home screen by clicking on the VOLUNTEERS drop down and Clicking on Volunteer Needs or by clicking on the Volunteer icon on the Home Screen. This will provide a list of events with volunteer needs along with the dates and ways that we need volunteers. Please check back often for new opportunities.

To view a list of the events you have volunteered for, just click on the My Sign-Ups option on the VOLUNTEERS drop down menu. The list will contain the event date, event title, name of the volunteer and volunteer position description.
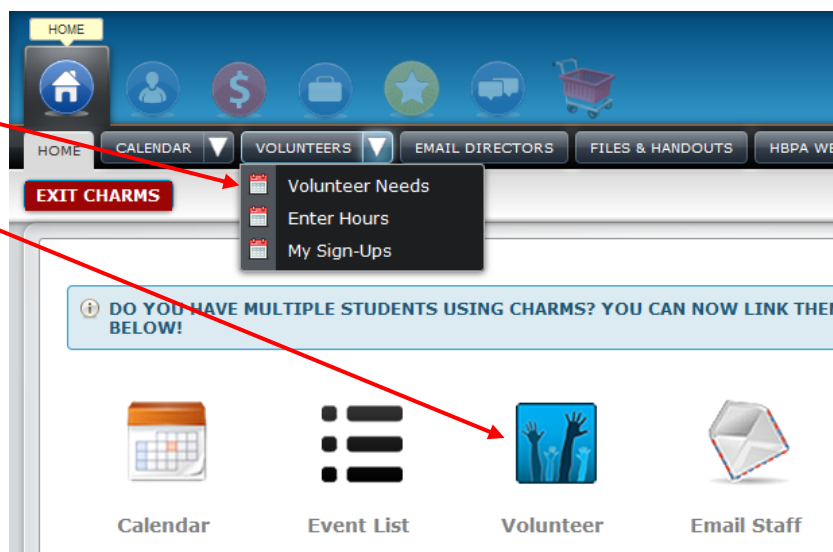
SYNC THE CALENDAR TO YOUR MOBILE DEVICE

You can quickly and easily add the Hampton Band Calendar to your mobile device!
To sync you smartphone calendar to the Hampton band calendar in Charms, check this link for the latest updated instructions. https://www.charmsoffice.com/charms/syncR.asp

For iPhone users:
1. Go into the Settings app
2. Touch "Mail, Contacts, Calendars"
3. Under Accounts, touch "Add Account"
4. On the Add Account screen, touch "Other"
5. Under Calendars, touch "Add Subscribed Calendar"
6. For the Server value, enter the URL of the public calendar:
    https://www.charmsoffice.com/charms/calsynct.asp?s=HamptonBands
7. Touch "Next" in the upper right corner.
8. It will verify the server then show a subscription page. Change the description if you like.
9. Touch "Save" to save the subscription.
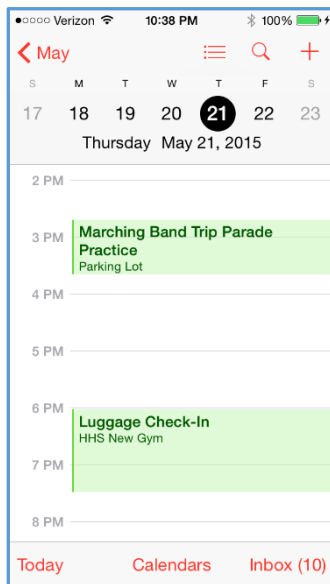
Actual iPhone screen shot of iPhone Calendar App displaying the Hampton Band Charms Calendar. Note events cannot be edited, they appear exactly as they were created in Charms. You can turn reminders on or off in your iPhone settings for the Charms calendar. If reminders are enabled, you can edit the reminder for calendar items synced from Charms.

For Android users:
To sync with Android devices, you will need to use your Google account and have a Google calendar created.
In your Google calendar on a desktop/laptop computer:
1. Under "Other Calendars" click the Add link.
2. Select "Add by URL"
3. Enter the following URL:
    https://www.charmsoffice.com/charms/calsynct.asp?s=HamptonBands
4. Click "Add Calendar"
5. Google will begin to sync your calendar, and it will appear on the screen.
6. Click "Settings"

7. Change the long name of the new calendar to something you will remember such as "Charms Calendar"
8. Your phone should automatically be set to sync with your Google calendar.
9. On your phone: Click on "Calendar", then bring up the settings for the calendar. Click on Calendar Sync. You should see your google account listed already. Make sure Auto-Sync is checked.

For Blackberry users:

To sync with Blackberry, you must first download the [Google sync](#) and install it on your phone.
1. Log into your Google calendar on the computer.
2. Under "Other Calendars" click the Add link.
3. Select "Add by URL"
4. Enter the following URL:
   https://www.charmsoffice.com/charms/calsynct.asp?s=HamptonBands
5. Click "Add Calendar"
6. Google will begin to sync your calendar, and it will appear on the screen.
7. Click "Settings"
8. Change the long name of the new calendar to something you will remember such as "Charms Calendar"
9. Your phone should automatically be set to sync with your Google calendar.
10. On your phone: Click on "Calendar", then bring up the settings for the calendar. Click on Calendar Sync. You should see your google account listed already. Make sure Auto-Sync is checked.

For Windows Phone users:

For Windows Phones with the new "Mango" upgrade you can now sync your Charms calendar:
1. On your PC, open the Windows Live Calendar site for the account your phone uses.
2. Click the Subscribe link (between New and Share).
3. Make sure Subscribe to a public calendar is selected
4. Enter https://www.charmsoffice.com/charms/calsynct.asp?s=HamptonBands as the Calendar URL
5. Enter "Charms" for the Calendar Name. The color and charm don't apply to the phone.
6. Click Subscribe to calendar.

Now the calendar from Charms is associated with your Windows Live calendar and will appear on your Windows Phone the next time you sync!

CHARMS MOBILE APP

The Charms mobile app can be downloaded and installed from either the Apple App Store or the Google Play Store. In both cases, the App is called *Charms Blue – Student App,* and it is **FREE**. This gives students and parents the opportunity to use the recording studio, the calendar, see finances and documents, and update student information on a mobile device, similarly to what you can do through a regular PC/Mac/iPad on the parent/student portal in Charms.

Download the Free iPhone App here
Download the Free Android App here

When you open the app, it will ask for our school code, **HamptonBands** , and your Charms password.

Opening Screen looks like this:

Tap the menu icon in the upper right corner the resulting screen looks like this.