

CHARMS

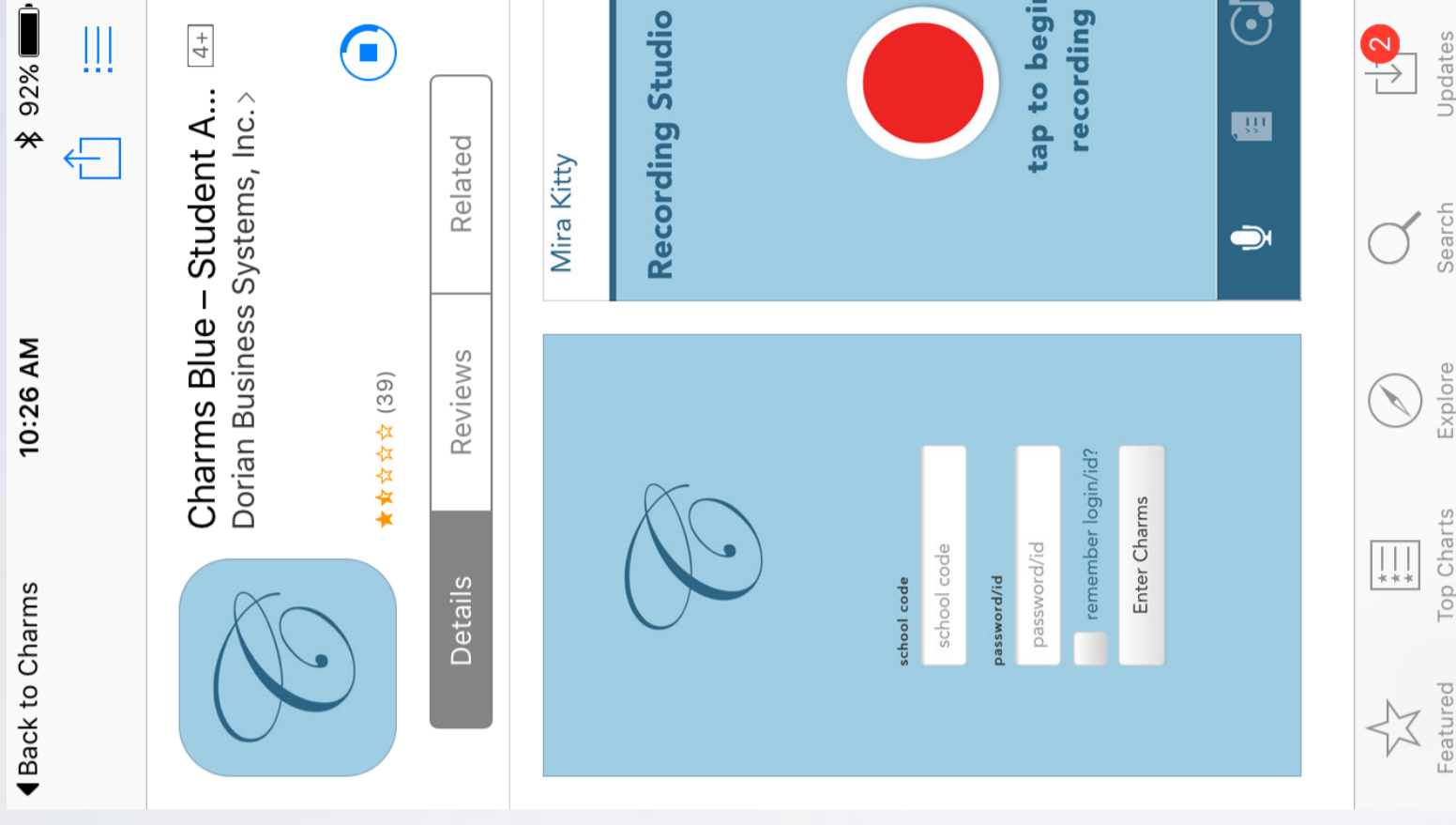
OAK MTN CHORAL DATABASE

CHARMS

- The purpose for CHARMS...
- Update personal information so we have accurate phone numbers, addresses, emails, etc. (must be completed/checked at the beginning of each year)
- Students will utilize the recording studio to record his/her own part throughout the year for grades.
- Check student's financial record
- Ability to email directors or Booster Board members
- The director also uses this database for our music library, costume inventory, and much more.

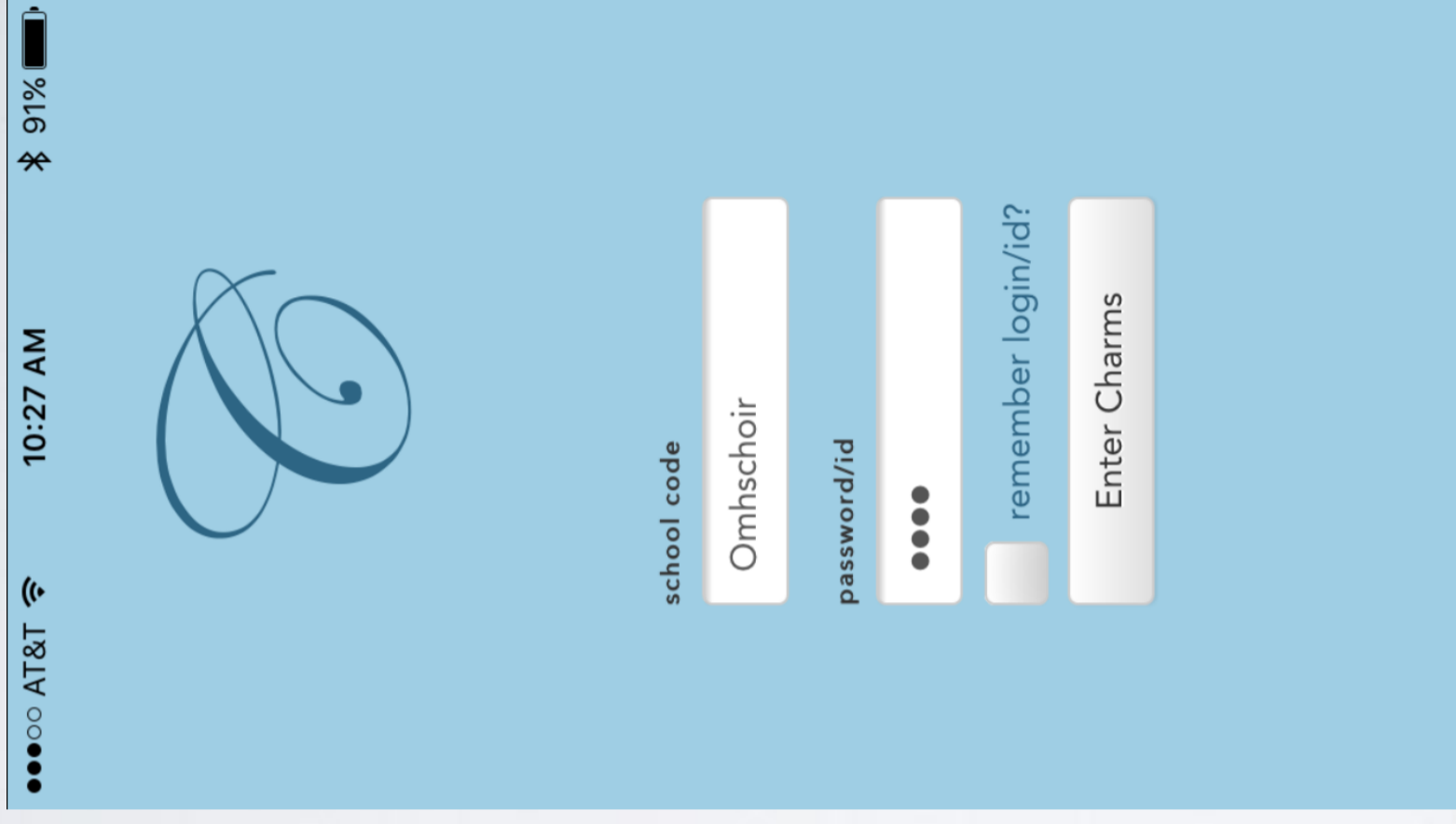
CHARMS

- Download the App on your iPhone, Android, or iPad.
- If you do not have a smartphone/device you can access CHARMS via the internet on any computer at www.charmsoffice.com (the rest of this presentation will depict the features of the App, but the login information is the same if accessing on a computer.)



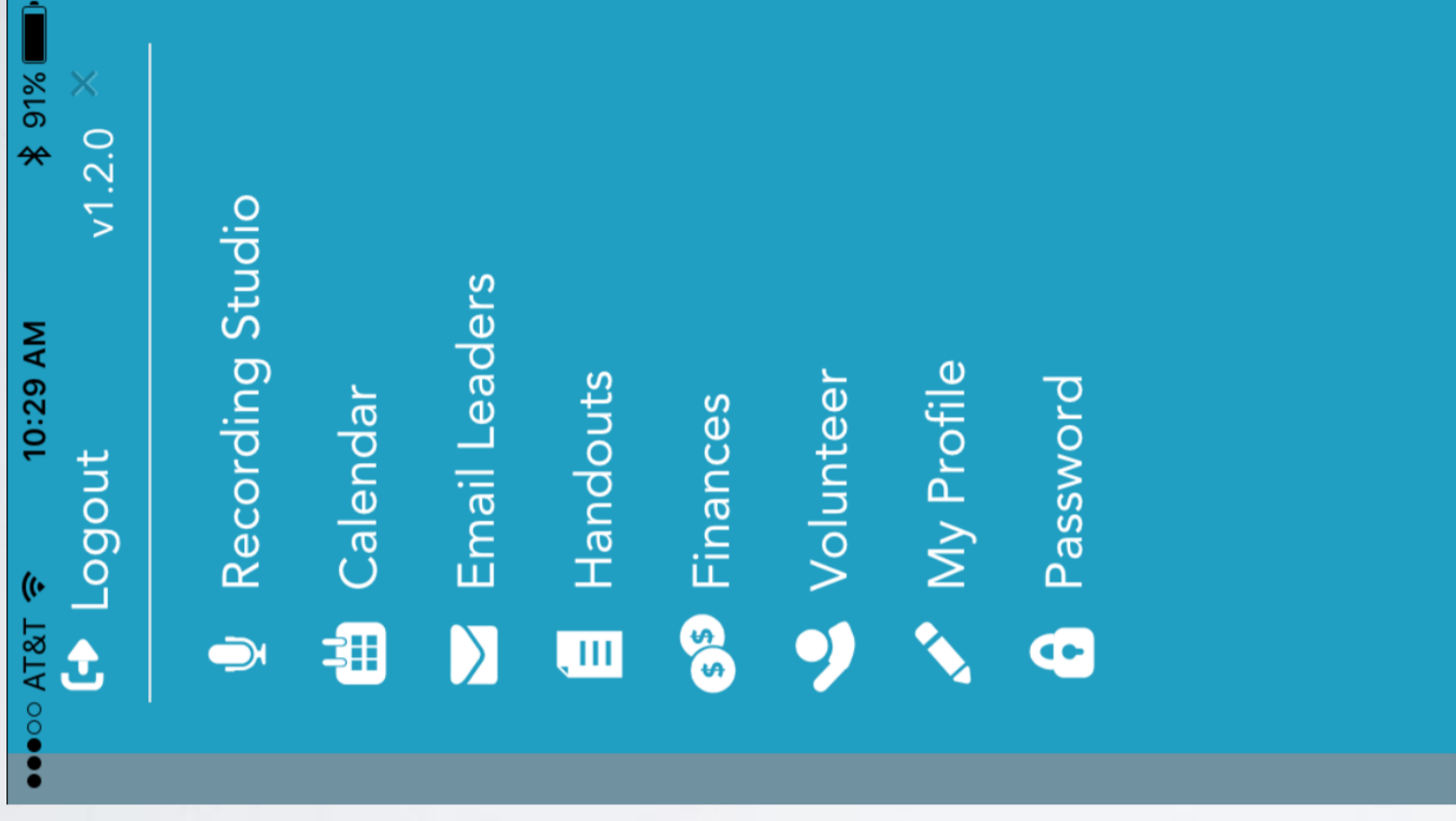
CHARMS

- Once the App is installed, this will be your login screen.
- **School Code:** OMHSChoir
- **Password/ID for New Members:** first and last name all lowercase (example: michaelzauchin)
- **Password/ID for Returning Members:** either the number given to you previously, or the password you chose after logging in the first time. If you cannot remember your password please contact Mr. Zauchin and he will reset your password.



CHARMS

- Click on the **three horizontal bars** in the top right corner to access the following menu
- Students will use the **Recording Studio** throughout the year.
- **Calendar** shows rehearsals and performances scheduled for your group/student.
- **Email Leaders** - easy access to the Director's and Booster Board members' email addresses.
- Important documents that might need to be signed we will upload under the **Handouts** section.



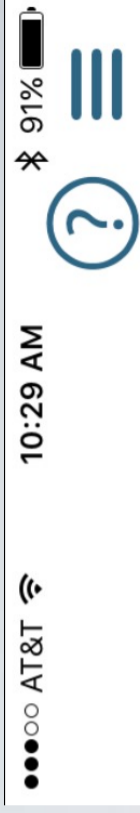
CHARMS

- The **profile** section must be updated every year.
- The **My Profile** page is the *student's information*. (Please capitalize and spell appropriately so we may print labels without grammatical errors)
- Once complete with the student's profile, click on **Edit Adult** in the top right. Edit and/or add parental information. This is crucial to the success of the program so the Director's can reach the parents as needed.



CHARMS

- The **Finances** portion of the App is the most helpful to keep track of payments throughout the year.
- All payments are setup as fixed payments as seen in the picture to the right. We *do not* use the *trip* ledger.
- The date next to the payment under the **fixed payment detail** notes when the payment was paid/receipted. If it is unpaid it will read, 'unpaid'.
- If you **fundraise**, that money will be in your misc ledger until it completes a fixed payment. For example, if this person had not paid December's payment and they had fundraised \$100 in carwashes, the student should only pay \$50 in the month of December and the \$100 fundraised will transfer from the misc ledger to the fixed payment ledger and that payment will be paid in full.



fixed payment detail

date	item	amt
04/20/16	8-December 8 Show Choir Payment	\$ 150.00
11/13/15	6-October 13 Show Choir Payment	\$ 150.00
11/13/15	7-November 10 Show Choir Payment	\$ 150.00
09/25/15	5-September 8 Show Choir Payment	\$ 150.00
09/01/15	4.5-August 12 Class Fee	\$ 25.00
08/26/15	4-August 12 Show Choir Payment	\$ 150.00
07/03/15	2-June 9 Show Choir Payment	\$ 150.00
07/03/15	3-July 14 Show Choir Payment	\$ 150.00
05/17/15	1-May 17 Show Choir Deposit	\$ 150.00
	Total Due	\$ 1,225.00
	Total Paid	\$ 1,225.00
	Total Unpaid	\$ 0.00

AT&T 10:28 AM

Financial Statement

totals

trip ledger due	
fixed payments due	
fundraisers due	
misc ledger credit	
store invoices credit	
total due	

trip ledger detail

date	trip	amt
	Total Due	0.00
	Total Applied	0.00
	Balance Due	0.00

fixed payment detail

date	item	amt
04/20/16	8-December 8 Show Choir Payment	\$ 150.00