

Benefits to Utilizing RunPTO

- Parents will get the same communication experience from all PTO/Booster groups in CUSD
- District groups can assist one another easier when we all use the same platform.
- As a whole unit, under the umbrella of CSB, there are economies of scale that can be utilized that individual groups don't have.

Resources for Getting Started

RunPTO Knowledge Base

Your RunPTO system is set up to accommodate the majority PTOs and Boosters in the Chandler School District. To assist you with customizing your portal, RunPTO has an extensive Knowledge Base to help you implement all aspects of this application. You can access this assistance through the primary RunPTO website under the Help tab at www.runpto.com.

In addition, this same Knowledge Base exists under the Help section tab on the left-hand side of the user window. In this Knowledge Base are videos and screen shot guides that should help make this process less complicated.

Training modules within RunPTO Knowledge Base include the following:

Getting Started	Administration
Organization Structure	Membership Management
Directory	Online Store
Email Blasts	QR Codes
Stripe Connect	Data Importer
Website Builder	Calendar Management
Finance Manager	

CSB Training

In the future there will be in person and virtual training programs to implement many of the modules and features available to manage your program.

Module Training Examples:

Administration and Getting Started

Finance Manager

Online Store

Membership Communication & Calendar Manager

Website Builder

After you have utilized the RunPTO Knowledge base, contact CSB if you are struggling and need additional assistance.

Recommendations & Best Practices for a Smooth Transition

Gather all your contact information, addresses, phone numbers & emails, on your board members, club members.

Use the RunPTO Knowledge Base and the videos mentioned here to complete this stage of RunPTO for your organization.

Gather your bank account information including statements that include the July 1st opening balance and transactions of MidFirst Account. (If using option 1.)

Gather your previous bank account's information that includes the July 1st opening balance and transactions. (If using option 1, below.)

If using option 2, add up and sort all your 2021-2022 transaction to be entered into the new chart of accounts in RunPTO.

Important Dates & Reminders

You can decide to use as much of RunPTO as you wish right away. The sections above are essential for moving forward to utilize much of the abilities that this application will provide.

Order your group's **credit cards** through

banking@chandler-schoolboosters.org

March 31st – Stage One President Tasks: Watch the video in the RunPTO knowledge base. [RunPTO Onboarding Guide](#).

Enter the initial users and the level of access (security roles)

Enter the Board/Chairs Directory

Create the Committee Directory

April 30th- Stage One Treasurer Tasks:

Watch the video in the RunPTO knowledge base. Finance Manager Video

The Knowledge Base for the finance manager has many other screenshot guides to assist you with all of the following required steps.

1. Become familiar with the chart of accounts. The chart of accounts is standard for all groups. Even though the Finance Manager Video and documents refer to adding groups and accounts, keep in mind that the standard chart of accounts is preferred.
2. Enter the opening balance of MidFirst Bank account (This would be the beginning balance as of 7/1/21)
3. Enter the total amount of Outstanding Checks Payable as of 7/1/21.
4. Enter Net Assets opening balance. This will be provided by the CSB
5. Budget-Enter your club's budget amount for the year.
6. Enter deposits/withdrawals
 - Option 1:** Enter all deposit and withdrawal (income and expense) transactions individually from 7/1/21 - **present**.
 - Option 2:** Enter a lump sum amount for each income and expense account from 7/1/21 – **present** (This must be completed by August 1st).
7. Enter transfers.
8. Reconcile the bank account.

August 1st – Complete financial implementation of RunPTO

(This will negate the need for end of year financial reporting in Mid-August as in previous year)

November 15th – CSB files Federal and State tax returns for all PTO/Boosters in CUSD.

Remember, any changes in officers need to be registered using the

[CSB website /Register Here](#).