ClubReady

A Guide To A ClubReady Data Conversion

- Obtaining data from CLR
- What happens when ClubReady receives your conversion files
- Reports available in ClubReady to verify the success of your conversion
- Your Checklist!

Step by Step

Please take time to review this guide and feel free to use this checklist created to assist you in making sure all items have been completed from start to finish!

1. ClubReady Conversion or Implementation Specialist will discuss the conversion process and confirm your conversion day via email.
2. **CLR will be contacted, on your behalf, & provided with your conversion date**. Data files will be emailed to ClubReady on your conversion date.
3. Complete ClubReady site setup, training & work with our Merchant Services team to establish your payment gateways.
4. You will receive reminder email from ClubReady at one week as well as one day prior to conversion day.
5. **Conversion day:**

- Be on the look out! ClubReady (conversions@Clubready.com) sends Club an email confirming CLR data was received & downloaded successfully.
- Track cancellations, freezes, bookings, etc. to be added to ClubReady once conversion is complete.

Conversion begins!

1. An initial review file and questions are presented to the POC. Be available for questions and review of conversion data in order for process to remain on track and maintain data accuracy.
2. Provide final written approval to ClubReady to finalize your conversion.
3. ClubReady begins uploading data into your ClubReady site.
4. Post summary email is sent including reports generated in ClubReady outlining converted details.

The Conversion Flow Chart

Date of Conversion

CLR exit data is generated & submitted to ClubReady. (conversions@clubready.com)

Email sent to Club to confirm the exit data has been downloaded successfully.
Data is analyzed and a ***review file** is compiled for the Club

Conversion Review Begins

ClubReady works to analyze the exit data and puts together a ***review file**.

Initial ***review file(s)** emailed and discussed, as needed, to address questions ClubReady may have. Adjustments made throughout initial review phase.

Once both parties appear to have no further questions, a final review file is provided to Club representing data exactly as it will be converted.

Club provides final written authorization at which point ClubReady will begin uploading data into the ClubReady site.

A review file**: a spreadsheet that is compiled to confirm ClubReady has interpreted the exit data accurately. The review contains information needing review and approval from the Point of Contact such as active/inactive customer counts, billing amounts & due dates, number of session credits remaining and more. ***Nothing is uploaded into ClubReady until the final review file has been completed and ClubReady has received final approval from the Point of Contact.

Frequently Asked Questions

Assigning a POC (Point of Contact): By default the conversion POC is the Club Owner. Owner may choose to designate a POC to work with ClubReady throughout the conversion process. If POC is someone other than the Owner, written approval is required from the Owner for POC to act on behalf of Owner.

POC will be responsible for reviewing, editing and approving data which will be uploaded into Club's ClubReady site. Once data has been uploaded the conversion is complete. Any needed adjustments may be completed by Club within their ClubReady site.

Keeping my conversion on track: POC should respond to emails/calls promptly in order to progress with the conversion process. Any emails that require a response and none is received within 24 hours of the email sent, this may be considered a cancellation of your conversion. Cancellation will require you to reschedule based on the current availability.

Using ClubReady during my conversion: Writing new deals, adding prospects, selling products & all other functions may be used during conversion. Editing existing user profiles is the only limitation, including cancelling or modifying existing agreements. You may edit once user has been uploaded to site & conversion is complete.

Seeing my data in ClubReady: Data uploads begin within hours of ClubReady receiving final approval, or next business day if approval is received after 4 PM Central Time (3 PM Central Time on Friday).

Uploads happen in this order:
- Customers-active, inactive and prospects
- Unused Session Credits-active and expired
- Agreements-active recurring contracts
- Past due balances

Additional details such as transaction & attendance history are uploaded within 24 hours after the full customer upload has been complete.

Payment profiles are also uploaded within 24 hours (excluding Saturday-Sunday) of receiving your final written approval.

The timelines above are subject to change. If items are not provided, file formats are incorrect, or other complications occur, uploads may be delayed. Uploads occur Monday-Friday.

Reading the Review File: Customer Tab

Active, Inactive & Prospects

Customers	Header	Definition
All users being uploaded into ClubReady as either a member/customer or prospect.	Store ID	Club's unique ClubReady store/site ID where user will be placed.
	Former Customer Status	Status as shown in former system. Included for data review needs only.
	ClubReady Status	Status being applied to the user in ClubReady. Active Member = will appear under member/customer section in ClubReady as active and able to access club. Inactive Member = will appear under member/customer section in ClubReady. If attempts to access club there will be an alert. Prospect = will appear under prospect section in ClubReady. Can be assigned a specific Lead Type at clubs request prior to data upload.
	Converted ID	User's unique ID in former system. This is used to match information across various files provide as exit files. Also used to match contracts, payment profiles, notes, etc to users once users are uploaded into ClubReady. Users are assigned a ClubReady user ID once they have been uploaded into ClubReady.
	Last Name	User's last name.
	First Name	User's first name.
	Gender	User's gender F = Female or M = Male.
	Address, City, State and Zi	User's complete address. State will be first two characters, if more than two are shown and zip will only be first five characters, if more than five are shown.
	Phone, Cell, Work	User's home phone, cell phone and work phone numbers. Phone number uploaded will be up to ten numeric characters.
	Email	User's primary email address. One email address will be uploaded per user. If the email address is not formatted properly it will be eliminated during the upload.
	Barcode	Check in ID for a barcode/keytag check in method. Must be used in order for customer to check in and attendance be recorded in ClubReady. Barcodes are unique to each user.
	Member Since	Membership clubs only: Date user became a member in former system. A user must have a member since date and a member expire date in order to appear as a member in ClubReady. Any user with a blank since or expire date will be uploaded as a prospect.
	Member Expires	Membership clubs only: Date user expired/expires. This date may be the end of a paid in full contract, date a contract term ends or the next due date (whichever is greater). A user must have a member since date and a member expire date in order to appear as a member in ClubReady. If the user is on auto-renew/evergreen draft then the expire date in ClubReady will continue to update as the customer makes their payments. Any user with a blank since or expire date will be uploaded as a prospect.
	ClubReady Member/Customer Type	User type assigning to customer in ClubReady. This can be used in ClubReady filters or reports to narrow down what group of customers you may want to see at any given time. Options can be viewed under club Setup section > Members > Membership Type.
	Prospect Type ID	ID of prospect/lead type assigning to customer in ClubReady if being converted as a prospect. ID can be viewed under club Setup section > Leads > Lead Type > Select Lead Type to view ID in top right corner.
	DOB	User's date of birth.
	Emergency Contact	Emergency contact full name.
	Emergency Phone	Emergency contact primary phone number. Phone number uploaded will be ten numeric characters.
	Bill To Converted ID	User ID in former system which belongs to the user who all charges will be billed to and/or primary user this customer will be associated under.
	Bill To Name	Full name of user belonging to Bill To Converted ID.
	Primary	True = user will be uploaded as a primary member or False = user will be associated to the Bill To user.
	Former Member Label	User type or package associated to user in former system. Included for data review and mapping needs only.
	Former Member Category	Additional user categorization in former system, if applicable. Included for data review and mapping needs only.
	Termination Date	Cancellation date tied to user in former system. Included for data review needs only.
	Suspended	True = user currently suspended/frozen or False = user not current suspended/frozen. Included for data review needs only.
	Suspended From	Date suspension began in former system. Included for data review needs only.
	Suspended To	Date suspension is scheduled to end in former system. Included for data review needs only.
	Club Number	Club name or number in former system.

Reading the Review File: EFT Tab

Draft/Recurring Dues List

EFT and Balances	Header	Definition
All contracts with invoices due or coming due that will be uploaded into ClubReady and attempted to draft if the customer has a payment profile on file.	Store ID	Club's unique ClubReady store/site ID where user and contract will be placed.
	Profit Center	Additional categorization in former system, if applicable. Included for data review needs only.
	Customer Status	Status as shown in former system. Included for data review needs only. Final ClubReady customer status determine on Customers sheet.
	Agreement Status	Status of contract in former system. Included for data review needs only.
	Last Name	Last name of user who contract will appear under and contract belongs to/who is receiving service.
	First Name	First name of user who contract will appear under and contract belongs to/who is receiving service.
	Converted ID Count	Number of times user is listed on EFT sheet. If user is listed more than once, multiple contracts will be converted to user's profile in ClubReady.
	Converted ID	User's unique ID in former system. This is used to match information across various files provide as exit files. Also used to match contracts, payment profiles, notes, etc to users once users are uploaded into ClubReady. Users are assigned a ClubReady user ID once they have been uploaded into ClubReady.
	Agreed Date	Date contract was purchased in former system and will appear as the purchase date on ClubReady agreements log report.
	Due Date	First date invoice will be due in ClubReady on this contract. **ClubReady will bill any invoices starting on this date and for any invoices after the date based on the periods, evergreen and billing cycle.**
	Amount	Amount due for each invoice. This amount should reflect the pre-tax amount of invoices. Sales tax will be added to this amount once invoices are uploaded into ClubReady. **Site setup must have sales tax added for tax to be applied.**
	ClubReady Package Name	ClubReady sales package that will be uploaded to this user's profile in ClubReady. Sales package replaces former contract. Options can be viewed under club Setup section > Sales > Sales Packages.
	Periods	Number of **invoices** remaining in the contract term.
	Evergreen	True/Yes = customer will roll over once number of invoices/periods have been fulfilled. Invoices will continue to generate unless club cancels the contract in ClubReady. False/No = customer will have number of invoices/periods due and there will be no further billing.
	Evergreen Package	ClubReady sales package that invoices will be associated with when contract evergreens.
	Evergreen Price	Amount due for each invoice that will be due when contract evergreens. This amount should reflect the pre-tax amount of invoices. Sales tax will be added to this amount once invoices are uploaded into ClubReady. **Site setup must have sales tax added for tax to be applied.**
	Billing Frequency	How often invoices will occur for this contract. Example: Monthly = invoices created and attempted every month, Bi-Weekly = invoices created and attempted every 14 days, Weekly = invoices created and attempted every 7 days.
	Payer Converted ID	User ID in former system of user who all charges will be billed to for this contract.
	Is Receiver	True = payer and receiver are same or False = payer and receiver are different.
	Payer Last Name	Last name of user responsible for paying invoices on this contract.
	Payer First Name	First name of user responsible for paying invoices on this contract.
	Termination Date	Cancellation date tied to this contract in former system. No invoices will be generated from this date forward. Incuded for data review needs only.
	Suspended	True = user currently suspended/frozen or False = user not current suspended/frozen. Included for data review needs only.
	Suspended From	Date suspension began in former system. Included for data review needs only.
	Suspended To	Date suspension is scheduled to end in former system. Included for data review needs only.
	Former Package Name	Package/program as named in former system. Included for data review and mapping needs only.
	Club Number	Club name or number in former system.

Reading the Review File: Sessions Tab

Sessions List

Sessions	Header	Definition
All available or expired service or class credits that will be uploaded into ClubReady.	Store ID	Club's unique ClubReady store/site ID where user and sessions will be placed.
	Last Name	User's last name.
	First Name	User's first name.
	Converted ID	User's unique ID in former system. This is used to match information across various files provide as exit files. Also used to match contracts, payment profiles, notes, etc to users once users are uploaded into ClubReady. Users are assigned a ClubReady user ID once they have been uploaded into ClubReady.
	ClubReady Service Name	Name of 1-on-1 service which session credit will be assigned in ClubReady. Options can be viewed under club Setup section > Scheduling > Services.
	ClubReady Class Name	Name of class which session credit will be assigned in ClubReady. Options can be viewed under club Setup section > Scheduling > Classes.
	Sessions Remaining	Number of session credits paid for in former system but were never used/booked. This will be the number of session credits uploaded into ClubReady as available or lost, depending on their expiration date.
	Expires Date	Date session credits will expired. If a future date = credit will be available for booking in ClubReady, if a past date = credit will be expired/lost in ClubReady, if no date = credit will never expire. Expiration dates can be edited per customer in ClubReady by club if a date needs to be extended, added or adjusted in any way.
	Former Session Descriptic	Session credit description in former system. Included for data review and mapping needs only.
	Former Category	Additional categorization in former system, if applicable. Included for data review and mapping needs only.
	Former Item Type	Additional categorization in former system, if applicable. Included for data review and mapping needs only.
	Per Unit Value	Per session credit value to be applied in ClubReady. This is very important if you pay your trainers a percentage of a sessions value.
	Original Payment Date	Purchase date of session credit in former system. Included for data review and mapping needs only.

ClubReady

Verifying Data in ClubReady

Key Reports

- **Invoices Coming Due**: This report details invoices that are already generate and due in the date range selected. Includes customer name, invoice amount and invoice due date. It also includes columns indicating if a Credit Card or ACH is on file. Found under Reports > Sales.

- **Draft Report**: This report details total draft due, attempted and collected over a period of time. Found under Reports > Sales.

- **Session Credits**: Outstanding session credit count and value. Option to view per user. Found under Reports > Credits/Bookings.

Also,

The Conversion Team will provide *post* summary emails throughout your first 30 days.

The Draft Summary reports will be included in these post summary emails. Draft report and email will outline attempted and success rates over these first 30 days.

In addition, there is *30 day post* review which will be a summary wrap up of any additional items added or changed since the conversion and an overview of your draft for the first 30 days drafting through ClubReady.

Quick Views Using Filters

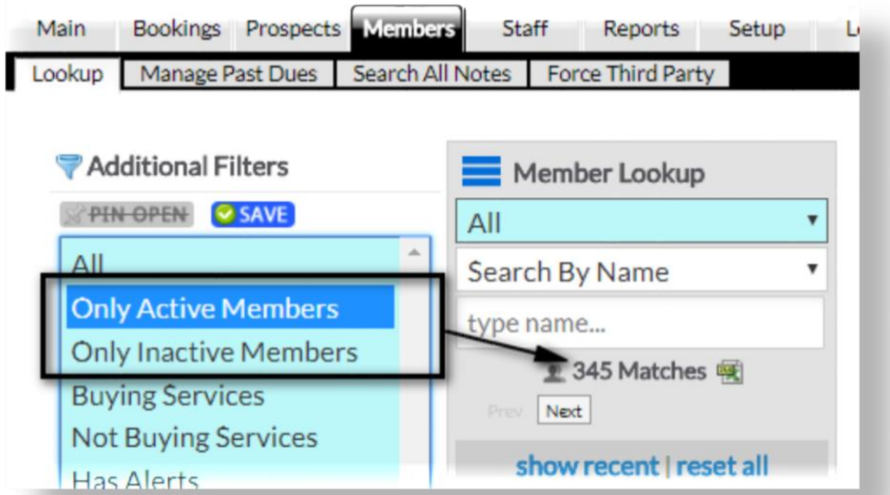
Use filters to review the active, inactive and prospect counts.

Using Filters

Suggested filters:

Only Active Members - Filter your list to only show members who have an active status (membership expiration date set in the future).

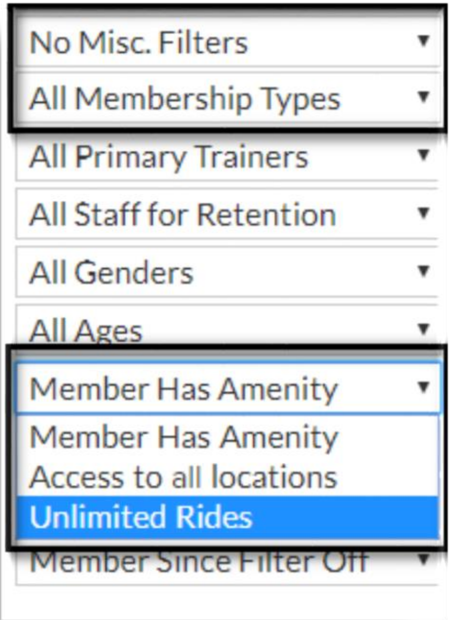
Only Inactive Members - Filter to view only members who have an inactive status (membership expiration date set in the past).



All Membership Types - Select by membership type assigned to the member.

Member Has Amenity - Choose by the amenity that has been assigned to the member.

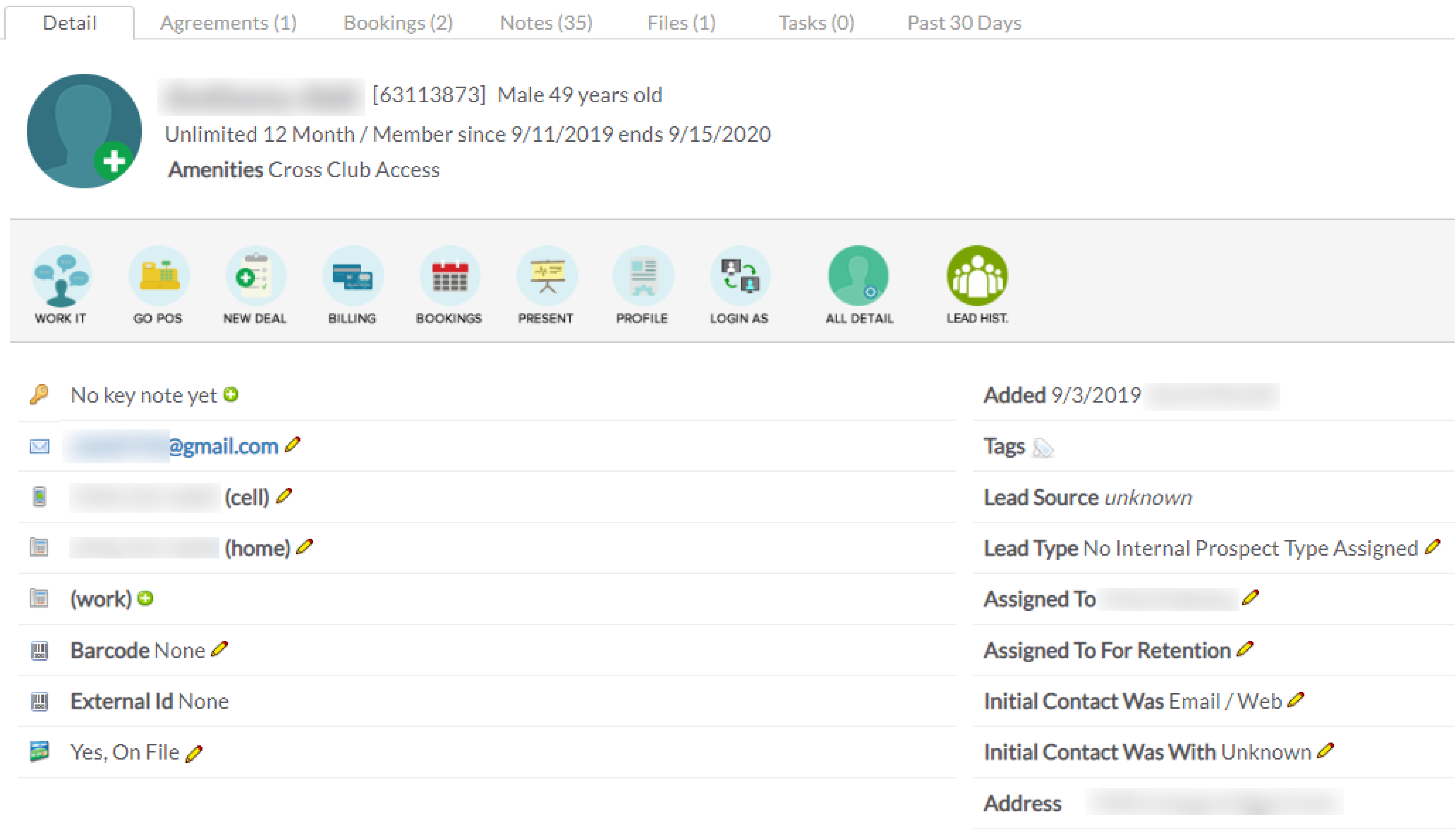
No Misc Filters - Select from the drop down if the member: No Pay Details On File, Has Past Due Amounts & Agreement Future Payments



User Profile

- Member name & ClubReady ID
- Member type
- Member start & end dates
- Amenity

Click to view last 4 & expiration date of payment profile

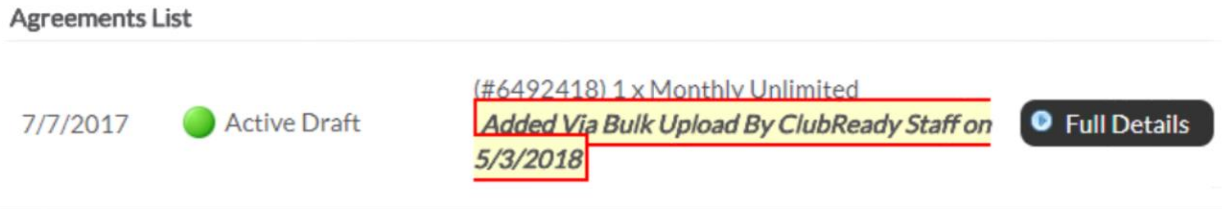


Agreements

View active agreements with future invoices

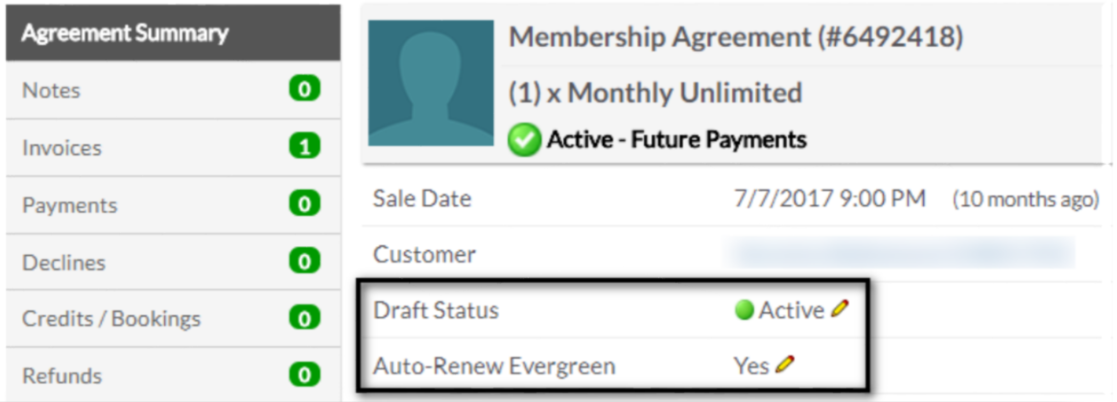
Click on **Agreements tab** (viewable upon selecting a member name)

Select **Full Details**

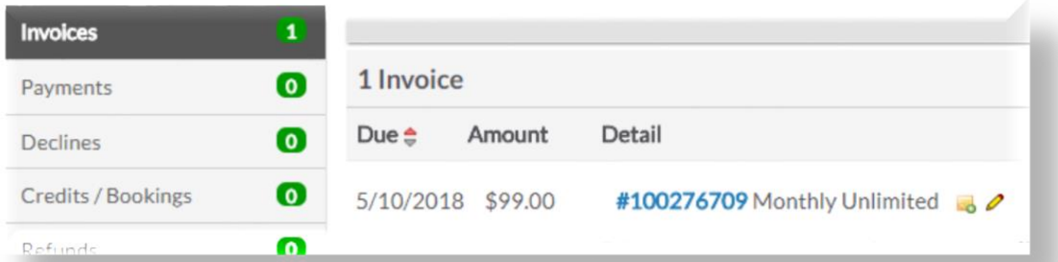


Draft status: Invoices will auto-draft by default as long as payment profile is on file.

Auto-Renew Evergreen: Invoices will auto-generate unless agreement is cancelled.



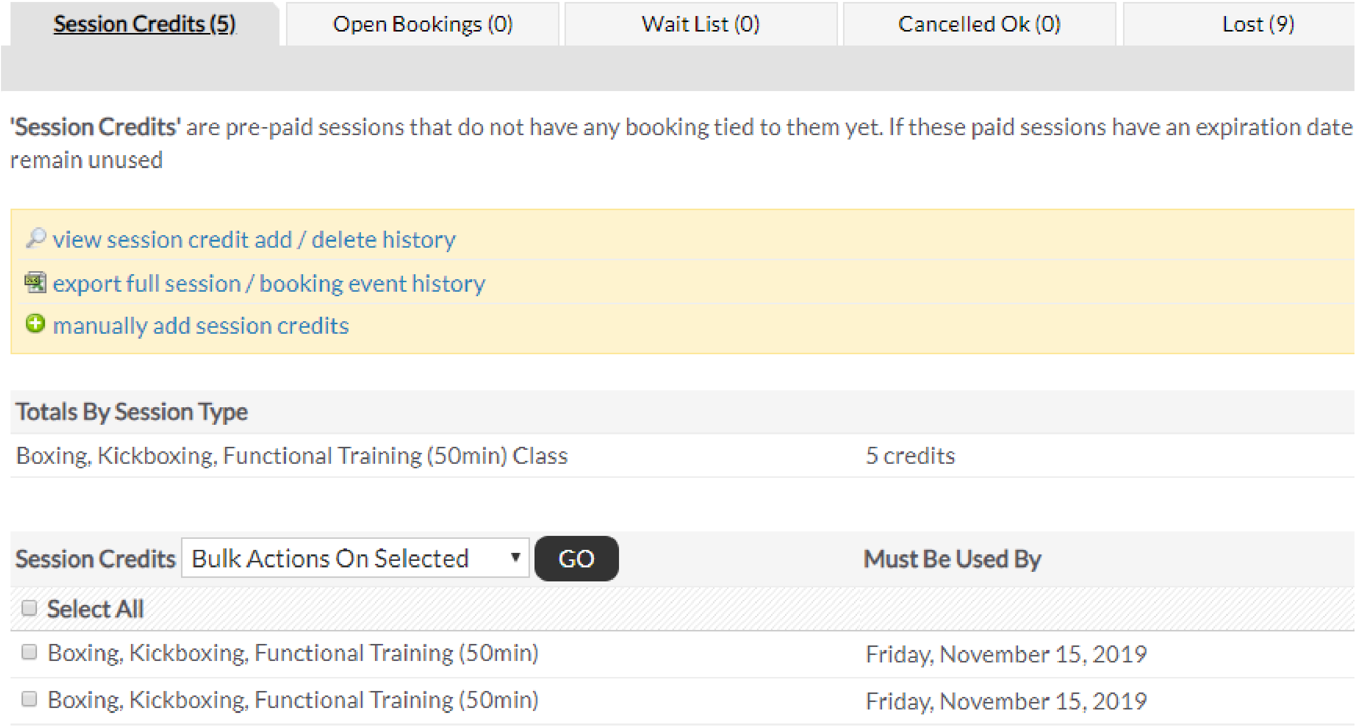
Click on **Invoices to view Due Date, Amount & Invoice Detail**



You may also view Credit Balances under Invoices view for those users who had these converted.

Service/Class Credits Available

Viewable upon selecting a member name



Session Credits: Paid but not booked class credits. View each credit & credit expiration date.

Open Bookings: Future bookings not logged as completed.

Lost: Expired converted credits

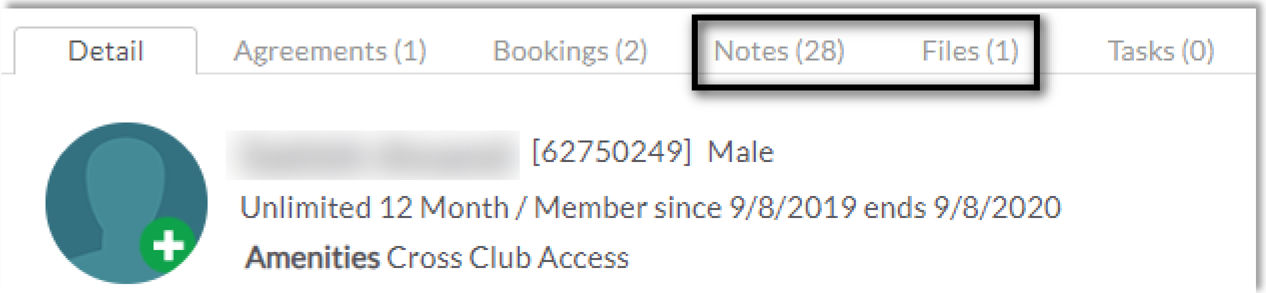
Completed: Bookings now logged as a show

NOTE: Converted will appear with "Free Session" however this is only due to the credit not having an invoice paid directly in ClubReady. Credits were loaded with the unit value provided in the final conversion review file.

Converted History

Notes:

Click on member name & select **Notes**

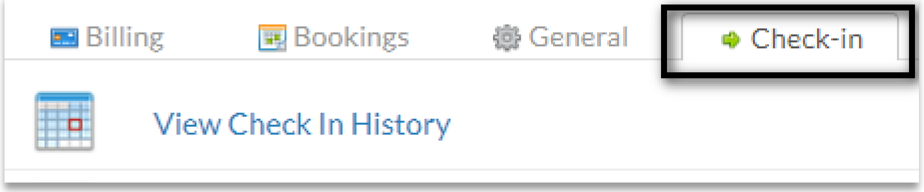


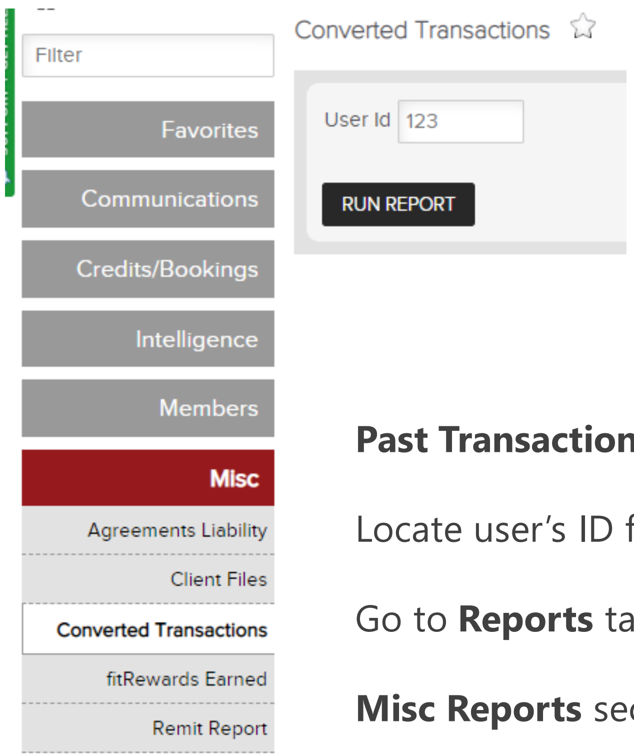
Past Bookings/Attendance:

Select **All Detail** icon from member page

Check-in tab

View Check In History for any selected date range





Past Transactions:

Locate user's ID from their profile

Go to **Reports** tab

Misc Reports section

Select **Converted Transactions**

To view all history converted, leave User Id field empty & select Generate Report.