



SchoolsBuddy

Pre-Live Checklist ClubsBuddy

Introduction

This document is to help guide you through the process of getting you live with ClubsBuddy, containing information for each stage and a handy list to help you track the steps as they are completed.

On the next page you will find the checklist, with more detail throughout the document.

Online Payments

Along with this document you will have received a guide on the steps to set up online payments for your ClubsBuddy account.

Start this process before moving onto the next page of this document.

Checklist

YOUR CLUBSBUDDY SETUP		Page	Done
Understanding Data in ClubsBuddy		3	<input type="checkbox"/>
Complete New Club Setup Information Form, adding logos & Registration form		4	<input type="checkbox"/>
Receive Activation Email and set your password		4	<input type="checkbox"/>
Watch pre-training videos and complete setup tasks		4	<input type="checkbox"/>
Test your registration process		4	<input type="checkbox"/>
Onboarding session with SchoolsBuddy	Date/Time:	4	<input type="checkbox"/>
Complete outstanding tasks and create first sign-up		5	
Set up Test Parent account and carry out test		5	<input type="checkbox"/>
Email Templates reviewed		5/6	<input type="checkbox"/>
Training session with SchoolsBuddy	Date/Time:	6	<input type="checkbox"/>
PREPARE FOR GO-LIVE			
Prepare a Letter/Notification to announce upcoming new system		7	<input type="checkbox"/>
Save your Subdomain and Organisation ID		8	<input type="checkbox"/>
Save SchoolsBuddy online support links		8	<input type="checkbox"/>
GO-LIVE			
Send Activation/Welcome emails to Parents		9	<input type="checkbox"/>
Check Parent uptake		9	<input type="checkbox"/>
Check initial parent use		9	<input type="checkbox"/>
FURTHER TRAINING			
Accounts/Finance department training		10	<input type="checkbox"/>
Reports/Summary learning		10	<input type="checkbox"/>

Your ClubsBuddy Setup

Understanding Data in ClubsBuddy

We offer two ways to add data to your new ClubsBuddy system. Our recommendation is that you ask your members to sign up for their own account using our registration process. You can use this as an opportunity to collect any required missing data, and to ensure that only active members of your club access the system. If you would like to request a one-time import of your existing member base we can provide you with a template to load these details directly to ClubsBuddy.

At registration you can customise the questions you require your members to answer and we can tag the information to registers and user records so that your staff have easy access to it. For instance, you may want to collect medical details that could be needed in case of emergency, or photography permissions for marketing purposes.

STAFF

All ClubsBuddy Staff will have access to view sensitive data including members' contact details and any information you have collected.

External Staff can be added to ClubsBuddy and configured with lesser permissions (for example, you may not want staff to be able to view the information you collect, edit events or send messages to members/parents). Please let us know if you would like more information on handling permissions for your staff.

We designate "Super users" for your club who can give elevated permissions to other staff members for functions such as administration, absence monitoring or financial processes.

If a staff member is also a parent of a member, they must use a different email address as a parent contact to keep their parent and staff accounts separate.

Staff accounts need to be deleted when no longer required. Member accounts can be set to dormant status which allows you to manage communications, in case you want to contact active members only.

MEMBERS

Younger Members can be set up with dummy email addresses. We can accept real email addresses if you would like your members to access ClubsBuddy themselves.

PARENTS

Both parents see all activities booked and charges for their child, but they will have their own credit wallet and voucher wallet to keep their individual finances separate from each other.

Your ClubsBuddy Setup

Complete New Club Setup Form

You will receive a link to the online setup form to provide details specific to your club site requirements. This includes a version of your logo and your registration form.

Receive Activation Email and set your password

The Key User 1 will receive an Activation email with a link to setup a password and login.

Watch pre-training videos and complete setup tasks

We will send you a link to a document which includes two short 'Discover' videos, as well as all required guidance to complete the setup tasks described below:

- **Block Dates** – set holiday dates to make creating repeating events easy
- **Staff Roles** – assign different roles to staff members, with different levels of access
- **Welcome Message** – set welcome messages on the landing page for staff, parents and students
- **Locations** – create specific locations to use when creating your events

Test your Registration Process

Please ensure you review the questions asked on the forms, noting whether any changes are needed and especially which should and shouldn't be mandatory.

Onboarding session with SchoolsBuddy

The email you receive once your site is setup will include a link to book your initial Onboarding call, which will last approximately 15-30 minutes.

This is to discuss how you would like to use the system so we can guide you accordingly and show you how to get the best out of it. This first call is not for all users at your club, just the key user.

On the first call we will discuss who you might need to include in the later training session.

Your ClubsBuddy Setup (cont.)

Complete outstanding tasks & create first signup

An opportunity to complete any outstanding setup tasks or repeat as required e.g. finish adding all Locations.

Also, if you are ready to proceed following your onboarding call, you can now create your first signup.

You will be advised to book a Training session so you can ask any questions you may have following the creation of your first signup, or to show you how to create your first signup.

Setup Test Parent account and carry out test

We recommend you create a Test Parent account so you can experience ClubsBuddy as your parents will.

NB The email address for this test parent will need to be different from any existing user.

You may have done this as part of the initial setup tasks but if not, do it now so that you can run through a test booking before opening your first signup.

You can use this account to check the setup is correct for any future signups you create, or to help parents that come to you with queries.

Email Templates

There are numerous Email Templates used within ClubsBuddy which can be amended with your chosen wording.

Before going live, you should check the most important templates and let us know of any changes needed.

Your ClubsBuddy Setup (cont.)

Email Templates (cont.)

These are the Activation and Welcome emails, which can differ for Parents and Staff. At this point you can also check the Email Footer.

Activation email – you will have received this as a Staff member and can check the Parent version when setting up a test parent.

Welcome email – you will have received this as a Staff member and can check the Parent version once your test parent account is activated.

As you work through setting up further signups and events within ClubsBuddy (and always Testing as a Parent) check for any email where you would like to amend the wording - these can be sent to the support desk (details on Page 10).

Training call with ClubsBuddy

Having completed all setup tasks you will probably have lots of questions.

Booking your Training session will give you and your colleagues the chance to ask those questions to one of our trainers.

These sessions are held on a video call so we can share the screen for demonstrations.

Think about the key people from your school who need to be on this call, e.g. Activities Coordinator (this will be discussed during your onboarding call).

Prepare for Go-Live

Prepare and write Letter/Notification to announce upcoming new system

When you are nearly ready to go live to parents and staff you will need to send a communication.

The below is an example parent template that you can use and adjust as required, depending on the modules you are using and when you plan to send activation emails to parents.

Dear Parents

We are very pleased to advise that very soon we will be starting to use online bookings for many of our activities, clubs and trips with a system called ClubsBuddy.

This includes tools to allow you to:

- Make bookings for your child/children online and view these in your own diary
- Pay fees and view your balance
- Receive various communications from us
- Importantly you will be able to do this on the move using the iOS and Android apps

We will be launching this in the next two weeks when you will receive an activation email that will include a link for you to create a password for your own login.

Please look out for this and check your junk email folder just in case.

Kind regards

Our Club Name

Prepare for Go-Live (cont.)

Learn/Save your Subdomain and Organisation ID

Please learn your club subdomain to ensure you have no issues signing in.

Once you receive your activation email you will have your subdomain which will be in the format: *yourclubname.clubsbuddy.net*

Your subdomain page shows your logo and SSO (Single Sign-On) option if you have chosen to use this.

Our Subdomain:

Organisation ID:

The Subdomain can be published on your club website so parents and staff can link through If needed.

Learn/Save SchoolsBuddy online support links

There are online portals for Staff and Parents full of support documents and videos for a wide variety of tasks.

When you receive confirmation that your ClubsBuddy site is setup, we will provide links to these online portals.

The support documents can also be accessed from within your ClubsBuddy site when you are logged in.

Once you have completed training and are up and running, our [Support Team](#) will be on-hand to help with any queries.

Go-Live

Send Activation/Welcome emails to Staff & Members/Parents

When you are ready, you can send Activation emails to Staff and Members / Parents if required.

This will contain a link for them to set a password, get logged in and start using ClubsBuddy.

NB You can import and activate existing members but we have found that the best way is to allow members to register themselves.

Check Parent uptake

Once you have sent Activation emails and are up and running, you can view who has and hasn't logged in, including:

- Members and Parents who have never logged in
- Members with Inactive Parent accounts

Check initial use

Once your first Signup is open we recommend you review the bookings and/or preference selections made, to ascertain useage.

If it is low you can then take the opportunity to send a further communication to encourage account activation.

Further Training

Accounts/Finance department training

Once bookings are open, training can be booked for your finance staff. We recommend this takes place within the first few weeks after the first payments have been processed. This will cover:

- o Refunds
- o Credits & Vouchers
- o Reporting / Reconciliation

You will have the link to the online booking form from the initial email received with the pre-training information. (*We can make this training earlier for you if needed.)

Reports/Summary learning

Within ClubsBuddy there are various standard reports you can use, and bespoke reports may also be available (*at an extra cost).

Once Signups are open, we advise you contact us to book some specific training on these reports and how to use them.

CUSTOMER SUPPORT

Once your site is live our Support Team will be on-hand to help with any queries.



help@clubsbuddy.com



UK Support Desk

+44 (0) 1903 959 565

Monday - Friday 9am to 5pm