Customer Self-Service Center Migration Guide

These instructions introduce you to the new Customer Portal, which is replacing the older Customer Self-Service Center, and guides you through the migration. Don't worry: it's not difficult and can take <u>less than an hour of time</u>. The most important thing is to make the transition as smooth as possible for your customers.

IMPORTANT: Please carefully read this entire document before starting (yes, we know, everyone hates reading instructions). Contact us if you have questions.

About the new Customer Portal

The new Customer Portal is clean and attractive – modern and easy to use with clear form labels and simple navigation. It's a 100% mobile-friendly registration system for your customers. They'll truly be able to register from a smartphone as easily as from a desktop computer or tablet. The registration process is now a step-by-step wizard.

Things to consider before migrating

If you are not prepared to make the change immediately, it's okay! The current Customer Self-Service Center will continue to work and be supported at least through the end of 2017. Although we recommend upgrading as soon as possible for the best experience.

Announce the change! The customer interface is completely changing, so this may be a surprise to your customers – a good surprise, but a change they need to be made aware of.

Prior to completing your migration, we recommend you **email your active customers** to let them know that a new mobile version of the Customer Portal will be available soon.

Most people should have no difficulty adapting to the new interface since it is so intuitive. Remember, this is a huge step forward in usability, so you can use this as a marketing opportunity to tell customers you have invested in a greatly improved Customer Portal to make registration and management easier.

To help you with this, see the sample email below for your customers.

The new Portal works with most of your old Customer Self-Service Center settings, with a few exceptions, so migrating to the Customer Portal before an enrollment or registration period should not cause you any difficulty.

Migrating to the Customer Portal – a step-by-step checklist
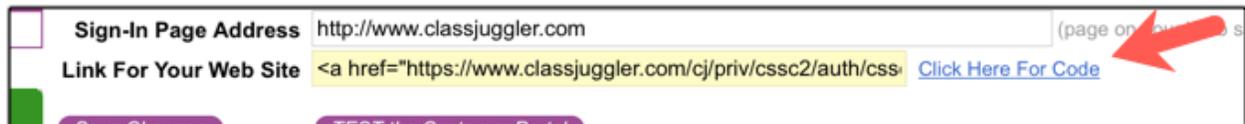
Follow this checklist to migrate to the new portal:

1. ❏ Provide ClassJuggler with a high-resolution version of your company logo in JPG, PNG, or PSD (Photoshop) format. The new Customer Portal adapts to larger screens and high-resolution screens (retina displays). Bigger file size is better. A logo of at least 1000-pixel width is best so it can scale to any size, from desktop down to tablet. If you do not have a high-resolution logo, send us what you have so we can add this to your new Portal.

2. ❏ Test the new Customer Portal thoroughly before launching to your customers so you are familiar with the new system. Instructions for testing are below.

3. ❏ Decide on a date to migrate from your existing Customer Self-Service Center to the new Customer Portal for all your customers.

4. ❏ Switch to the new Portal:

   o ❏ Send an email to your active customers letting them know that a greatly improved Customer Portal is launching soon. We recommend sending this email **at least one day in advance** of switching over.

   o ❏ Migrate your Customer Self-Service Center settings to the new Customer Portal (detailed instructions below). Temporarily "**turn OFF**" the portal.

   o ❏ Update your Web site links and buttons with the new URL (web address) for your Customer Portal (see instructions below).

   o ❏ Test all of the links on your Web site to make sure they go to the new Customer Portal and not the old Customer Self-Service Center – it will be a new web address.

   o ❏ Test the portal one more time to make sure your welcome message and other features are working as you expect.

   o ❏ If everything looks good, "**turn ON**" the portal so customers can register and access their accounts again

5. ❏ Pat yourself on the back. You've finished your migration to the new Customer Portal!

Testing the New Customer Portal

Before making any changes to the setup, you can test the new customer portal by going directly to the new URL (web address). The address will look like this:

`https://www.classjuggler.com/cj/priv/`**`cssc2`**`/auth/cssc_signin.php?cssc_id=``XXXX`

The only part of the URL that has changed from the old link is the part in red above. The "XXXX" in green above is the unique code that identifies your business. You can get this address by going to your new **Customer Portal Manager** screen from your ClassJuggler administration interface and clicking on the link to view your code. **Make sure to *not* click "Save" anywhere on this screen yet**.

Sign-In Page Address	http://www.classjuggler.com	(page on your web s
Link For Your Web Site	<a href="https://www.classjuggler.com/cj/priv/cssc2/auth/css	Click Here For Code

Get comfortable with the new portal. **Register yourself as a pretend new customer** and explore the new interface. Note:
- You will not see your logo on the sign-in or registration screens in most cases, unless you already provided a new high-resolution version to us.
- Your current welcome screen text may also not appear correctly, but you can ignore that for now.

Sample email For the New Customer Portal

Below is a sample email you can customize and send out to your customers. We've put alternate options for some sentences in blue brackets "[ ]" to provide you suggestions. You can use your Customer Mass Email tool in ClassJuggler to send this out!

Dear [Customers, Parents]

We are excited to announce our new Customer Portal that will be launching [soon, tomorrow, on mm/dd/yyyy]. We've been listening to your feedback and now have a 100% mobile-friendly registration and account management system that is much easier to use on any device.

Whether you're on your desktop, tablet, or smartphone, the new Portal works on all screen sizes, so it's just as easy to use on a phone as it is on your computer. No more pinching and zooming on your phone to navigate forms!

If you are a new [parent, customer] registering for the first time, or a returning [parent, customer], you'll find the new mobile interface simple and clean and very easy to use.

To access our new Customer Portal just visit our website [after the Customer Portal launch; after mm/dd/yyyy] at [your website address here] and click on the [register button, registration menu, etc...].

If you have any questions, please let us know. And as always thanks you for your business!

Sincerely,
The staff at [company name]
[you support phone number]
[your support email]

Migrating Customer Self-Service settings to the new Customer Portal

You'll find the new **Customer Portal Manager** on the **Tools** menu in ClassJuggler just above the old setup screen for the **Self-Service Manager**.

While the configuration screen has changed, it has mainly been streamlined and simplified. There are only a few changes in the actual settings on the new Customer Portal Manager screen you need to be aware of. All other settings should transfer over without any modifications.

We'll describe first what has changed, and then we'll tell you what you need to do to migrate your account.

1.   What has Changed:

1. **Company Logo –** There is now only a single company logo. This will appear on both the registration and sign-in screens in the new portal. A high-resolution logo works best for the new portal.

2. **Online Help –** We've added a new help screen "Customer Portal Manager" with illustrated instructions for the new Portal Manager. We recommend using this if you have questions.

3. **Social Media Links –** There is a new tab called "Social Media Links" where you can add your social sites to the Customer Portal. If you do not have a particular social site, leave that entry blank.

4. **Welcome Page Text –** The editor for the welcome text has been simplified and no longer includes tools for images, tables, and other special features. Removing those features was necessary for the Customer Portal to remain responsive (adapt its look for smaller screens like smartphones).

5. **Family: Customer Information –** Renamed from the old "My Information Page" tab.

6. **Family: Student Information –** Renamed from the old "My Students Page" tab. The "Student medical fields" on/off option has been removed. This setting has been removed since it made little sense to prevent a customer from providing important allergy and medical information about a student.

7. **Billing –** Renamed from the old "My Account Page" tab. The "Allow viewing voided transactions" option has been removed, as it was not needed by any of our customers.

2.   What you Need to do to Migrate Your Settings:

Perform these simple steps to migrate your settings after you have announced the change to your customers:

1. Go to the new **Tools > Customer Portal Manager** screen
2. Turn "Off" access to the Customer Portal so customers cannot use it while you are migrating.
3. Review and update all of your settings on the Customer Portal Manager screen.
4. Add your social links to the "Social Medial Links" tab.
5. Update your text on the "Welcome Page Text" tab (see below for details on these).
6. Test the new Customer Portal again to make sure everything is working and looks good.
7. Turn "On" access to the new Customer Portal when you are finished.

Social Media Links
Set up any of the links you have to social media sites like Facebook, Instagram, and YouTube. These will appear under your Welcome screen text.

Welcome Page Text
Since the formatting tools and rules for acceptable formatting have changed, we recommend starting with fresh welcome page text. Images and tables do not scale well on mobile devices, so these options had to be removed from the editor and template.

First, copy your old welcome page text to a Word document or text document for backup so you have a reference. Then, delete the text in the Customer Portal Manager editor and click **save**. This will reload the editor with the pre-defined "Welcome Text" template.

Using the pre-defined welcome text template, make changes to say what you want to say to your customers. Use the FORMAT dropdown tool for doing headings – for example, the main "Welcome to the Customer Portal" heading. Avoid overuse of colors and other elements to keep your welcome page clean and in-line with the new streamlined look.