GYMDESK FREE CHECKLIST

GYM SOFTWARE SWITCH CHECKLIST

Every step from the guide, in the order that keeps billing running. Fill in your notice deadline first, then work down the list.

YOUR DATES

Contract renews _____

Last day to give notice _____

Go-live target _____

BEFORE YOU GIVE NOTICE

- [ ] Contract read: term end date, notice period, and auto-renewal found
- [ ] Notice deadline written down
- [ ] New software and payment processor chosen
- [ ] New vendor asked who does the import, what it can't import, and who requests the card transfer

STEPS 1–2: EXPORT AND CLEAN YOUR DATA

- [ ] Member list exported while you still have full access
- [ ] Members with no email address fixed
- [ ] Kids' birthdates, ages, and genders checked
- [ ] Data in the wrong fields (ranks, injuries, parent names in notes) moved into proper columns
- [ ] Every member's name spelled the same way across files
- [ ] Active memberships exported with plan, price, and next billing date
- [ ] Unused class-pack credits and frozen or on-hold members included
- [ ] Family account links noted so they can be rebuilt

STEP 3: MOVE STORED CARDS

- [ ] Found out who owns your processor account
- [ ] New processor account opened
- [ ] Migration request opened with the new processor
- [ ] Card file requested from the old processor (by the account owner), with names and emails included
- [ ] Dead plans cancelled before the transfer
- [ ] Payment processing switched off in the new system before syncing cards
- [ ] Re-collection plan ready if the cards can't move: one request, follow-ups, a deadline

STEPS 4–5: IMPORT AND REBUILD

- [ ] Card transfer finished before importing members and memberships
- [ ] Members imported, then memberships, with a review pass for duplicates
- [ ] Attendance, products, leads, and payment history imported
- [ ] Email marketing opt-outs carried across
- [ ] Old schedule screenshotted before losing access
- [ ] Class schedule rebuilt
- [ ] Staff accounts and permissions set up again
- [ ] Waivers, documents, and member photos redone

STEPS 6–7: RUN SIDE BY SIDE AND GO LIVE

- [ ] Test check-in at the front desk
- [ ] Test charge on a test member before any member cards are synced
- [ ] Class booked from the member side, on a phone
- [ ] Each staff member walked through a normal shift
- [ ] Billing turned off in the old system
- [ ] Payment processing turned on in the new system
- [ ] Email sending turned on
- [ ] Members told, with one job: reset their password (and add a card, if re-collecting)

AFTER THE FIRST CLEAN BILLING RUN

- [ ] Notice given to the old vendor, inside the contract window
- [ ] Old system cancelled

NOTES

> Card transfers often take several weeks to a couple of months. Don't give notice until a real billing run has gone through cleanly in the new system.