

Charms Migration to CutTime CHECKLIST



Your success is our success. We are excited for you to begin your migration journey with us. Use this suggested checklist as a starting point for your planning, as each fine arts program is unique in their operations and needs. Make sure to note any other system data you may need to export and back up.

Let's get started - your NEW Fine Arts Toolbox awaits.

STEP 1: PLANNING

Review our Charms Migration Onboarding Guide [here](#) before making your specific migration plans.

- Request your district's/organization's/program's 'Migration Week' slot using our form [here](#)
- Once confirmed with us, designate your 'Migration Week' on your department/organization calendar
- Set the end date for final updates, communications, etc. to stop in your Charms account
- Mark out specific dates to inform your teaching staff, helpers, and members about the change to CutTime

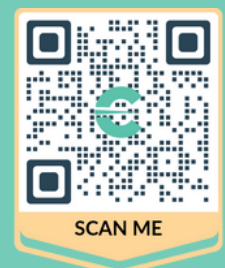
STEP 2: EXPORTING AND ACTIVATING ACCOUNTS

You can find specific help articles and videos on exporting and user accounts via our Online Help Center [here](#)

- Export your program data from Charms once you've received notification from CutTime
 - Students (Active)
 - Students (Inactive/Alumni)
 - Adults (Guardians)
 - Helpers
 - Contacts
 - Documents & Forms
 - Inventory (Instruments,)
 - Library
 - Uniforms / Apparel
 - Calendar
 - Finances
 - Online Store Reports

- Export and back up any other data utilized by your program in Charms
- Activate your new CutTime Administrator Account credentials then log in to CutTime via app.gocuttime.com and go to Program Dashboard
- Add additional authorized users if appropriate for your program(s):

- Co-Administrators
- Boosters
- Teachers
- Helpers



STEP 3: IMPORTING & SET UP

You can find specific help articles and videos on importing [here](#)

- Import your program data into the CutTime import templates
 - Students (Active)
 - Inventory (Instruments, Attire, Library)
 - Adults (Guardians)
 - Finances (Account Balances)
- Make sure all Students have an assigned Guardian
You can assign multiple guardians to a student if needed.
- Create Ensembles and Assign Student Members and Positions within each ensemble
- Set up your Inventory Locations and adjust data within Inventory data if needed
- Assign Instruments, Attire, Sheet Music to Students and send rental agreements if applicable
- Add Instrument and Attire Repair data and documents where applicable
- Recreate any recent important Announcements (e.g. changes to schedules, newsletter, etc.)
- Recreate any upcoming Events (single or series) based on your Calendar
- Repost any upcoming Volunteer Jobs within the relevant upcoming events
- Online Store Coming Soon - we will notify you when these features are available for you to complete your data imports and set up.



STEP 4: COMMUNICATING

You can find specific Welcome to CutTime Communication Kits [here](#) and Branding Kit with templates [here](#)

- Send 'Moving to CutTime' Emails and distribute 'Welcome to CutTime' flyers to stakeholders
 - Staff / Teachers
 - Booster Club Members
 - Parents-Guardians & Students
 - Helpers

We recommend distributing these materials prior to sending the 'Welcome SMS Magic Link' to members
- Update your organization's website and program handbook with our materials
 - CutTime Logo w/description
 - Member's Magic Link details
 - CutTime website URL
 - CutTime Market details
- Post social media announcements about the switch to CutTime
- Put up CutTime posters inside your classroom and other fine arts spaces
- White list CutTime's IP domains to ensure you receive notifications

NEED HELP? Visit our [Online Help Center](#) or chat with us

