SMRT Data Conversion

A synopsis of our current data transfer process and challenges

When onboarding a new client the data transfer is arguably the most important part for maintaining the client's trust in our company. Whether it's the owner or CSR that notices a problem with the data transfer, any inaccuracy plants a seed of distrust and worry. We've often had clients ask, "If this data is wrong, what else is?"

Getting the data transfer right calms nervous owners and employees, instills trust in our company, leads to smooth installs, and reduces the need for support after the initial install.

In this document I will outline what data we are able to transfer, the different processes in extracting data and massaging from other systems, and the challenges we currently face with our data conversion process.

Data We Can Transfer

1. Customers
2. Credit Cards
3. Credits
4. Reward Points
5. Heat Seals
6. Orders
7. Balances
8. Gift Cards
9. Reward Credits
10. Item Brands
11. Pricelist*

I'll now review the individual pieces of data that can be imported within each of these larger categories.

Customer Data We Transfer

- ID - The customer ID links the customer to every other piece of data we transfer.
- Last Name

- First Name
- Company - If the customer is a company we import the company name in this field
- Last Name2 - Spouse's last name
- First Name2 - Spouse's first name
- Email
- Billing Email - can have multiple values
- Sign Up Date - the date the customer was added to the other system
- Last Visit Date - the last time the customer had a pickup or new order
- Route
- Stop Number
- Will Call? - Whether or not the customer is regular or will call
- Route Days - The days the customer is regularly scheduled for. E.i. Monday Only
- Store
- Mobile Phone
- Home Phone
- Billing Address
- Delivery Address
- Business Address
- Other Address
- Notes - These notes get added as Account/Contact Other notes.
- Inspection Notes - These notes will print on the customer's tickets.
- Delivery Notes - These notes will show up in the delivery app.
- Payment Preference - Autopay, POS, or Statement
- Autopay Terms - The frequency for when autopay runs. E.i. Weekly Autopay
- Autopay Statement? - Whether or not a statement is generated after autopay.
- Discount - The permanent discount a customer has.
- Group - The group a customer belongs to; master billing, general, or credit subs
- Delivery Account - The master delivery account a customer belongs to
- Preferences - All preferences a customer has.
- Account Type - Used to import customers as Master Billing groups.
- Tax Exempt? - Whether or not a customer gets charged sales tax.

Credit Card Number, Credit Card Expiration, Credits, and Reward Points are all technically handled by the customer import tool but are imported as separate files with just the customer ID and the corresponding value.

Heat Seal Data We Transfer

- Customer ID - This is how we link the following to the proper customer
- Barcode - Heat seal barcode number
- Price - We do not currently use this field as it will lock the price of the item.

- Item Type
- Special Cares
- Colors
- Brand
- Pattern
- Fabrics
- Description - we converted comments or item notes into the description

The number of times an item has been cleaned or any historical data is not transferred.

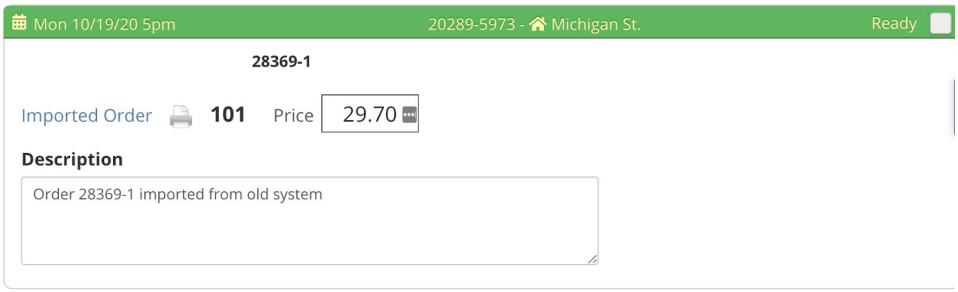
Order Data We Transfer

- Store
- Identifier - The order number from the old system.
- Description - A summary of the order from the old system. E.i. 2 pieces - Laundry
- Date - The date the order was created in the old system.
- Price
- Location - Rack location from the old system the order is racked to.
- Customer ID
- Status - Order status, Ready if the order is racked, Processing if the order is not.
- Agent ID - Not used very often, this field allows you to specify an agent.
- External Barcode - This is the value of the barcode data from the old system.

We do not import any order history, this is just for orders currently in inventory or in process.

Balances are imported using the Order import. The only difference is we create our own unique identifier and set the status to Customer so that the orders are not shown as in inventory.

Imported orders do not have any of the normal details of an order, and are displayed like this:



Gift Card Data We Transfer

- Barcode - This is the barcode on the gift card
- Date - This is the issue date of the gift card
- Amount - This is the current value of the gift card

We rarely have to transfer gift card data but are equipped to do so.

Reward Credit Data We Transfer

- ID - The reward ID
- Date - The date the reward was created in the old system
- Customer ID - The customer ID for the customer the reward belongs to
- Amount - Value of the reward
- Expiration Date - Date the reward expires

Also rarely transferred. This is for the actual REWARDS that a customer already has earned, not their current reward points.

Item Brand Data We Transfer

- ID - The ID of the Brand in our system (used for updating)
- Name - Brand Name
- Upcharge - Name of the upcharge the brand will trigger when added to an item.
- First Seen - Date the brand was added to the system
- Created By - Employee that created the brand
- Verified? - Whether or not someone has verified that the brand is real
- Active? - Whether or not the brand is active

Pricelist Data We Transfer

- Item Name - Name of the item type in the pricelist
- Pricelist - Either “Main” or the ID of the account for secondary pricelists
- Price - Price of the item

This tool is currently not used for data transfers because it is missing Department and Category, which are needed to properly transfer pricelist data from the old system to SMRT.

How do we get the data to transfer?

The data extraction process differs from system to system. There are two main methods, running a variety of reports, or transferring an entire database. The latter is only done when the customer has their database on their computers. This only occurs with older or smaller systems like Royal Western or Scanq. For SPOT, we pull 10+ reports and then have to message the data. Sage Cleaners, a SPOT conversion, had over 56 reports pulled for their conversion (Zip file here).

For CompassMax, DCCS, and Liberty we have tools that extract the data in the exact format we need it in. Doug, Steve, and Zane can explain how these tools are used.

Here are some guides for extracting data from other systems:

SPOT:
https://docs.google.com/document/d/1CSQzyVGgevC59-gwws5WALgQXjdgXT0v-mEM0tA1kUE/edit?usp=sharing

Enlite:
https://docs.google.com/document/d/15pcyKmtBU_5TCiOzusCC-9qIG_-L4cN1zi_jyWNh11g/edit?usp=sharing

How do we massage the data to import?

With CompassMax, DCCS, and Liberty we have hardly any data massaging to do before importing the data into the system. We need to make sure the following data points match the system verbatim:

- Route Names - Customer Import
- Store Names - Customer & Order Import
- Discount Names - Customer Import
- Group Names / IDs - Customer Import
- Item Names - Heat Seal Import
- Special Care Names - Heat Seal Import

To do this we open the import files in Excel and check that the values match or exist in the system.

For other systems that are *not* SPOT we have Excel files where we can paste reports or tables from the database we extracted that will create import files. If the system we're converting doesn't have an Excel conversion file we just look through the data and create one, column by column. These scenarios aren't very common, and the importance of maintaining data symmetry is not as important because the customers with these systems are generally smaller operators with little complexity.

SPOT is where we have a significant amount of massaging to do. A simple SPOT data conversion can take anywhere from 30 minutes to 2 hours. A complex SPOT data conversion can take anywhere from 3 to 8 hours. To make things worse, SPOT has recently removed the export tool that we used to get Heat Seal data and the majority of the Customer data. The Heat Seal data now has to be requested from SPOT. The customer data export, called Client Export, had almost every piece of customer data we needed, and we even have a tool that automatically converts this file format into an importable file. Since we lost these exports we've had to pull a variety of reports to replace the data we got from the Client Export and we don't not have conversion tools for it, besides Excel templates.

One of the most difficult aspects of handling SPOT data is that a number of the reports do not have the Customer ID in them. This means we need to use Excel formulas to determine the Customer ID via name or phone number. This process has 2-10% failure rate.

More specific details on SPOT conversion to come…

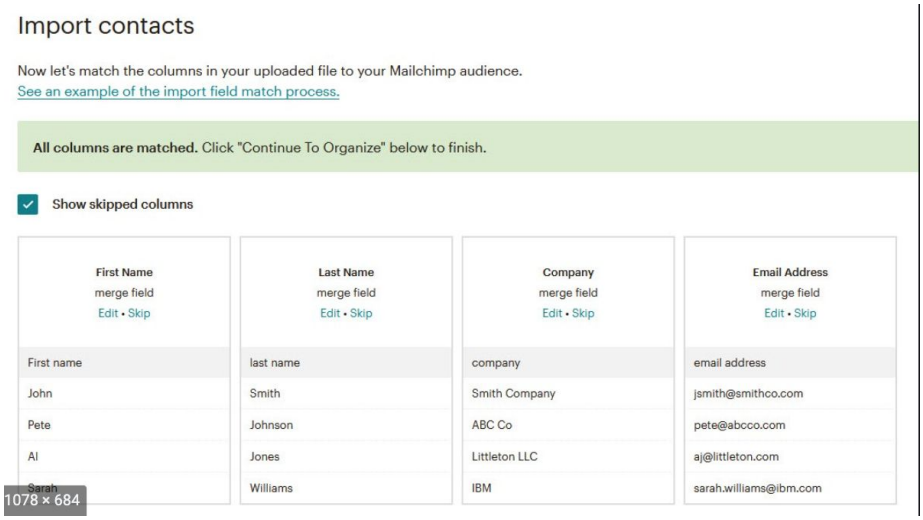
Improvements Needed

My vision for the outcome of this project is a system that is simple enough that any Project Manager can follow a predetermined path of report extraction and direct upload to the system that will guide them through the process, and eliminate the need for data savants and Excel wizardry.

In general our import tools need to be more flexible. For example if you import a customer file with the value “Store2” in the store column, but the system has “Store 2” the customers will not get assigned to the proper store.

Here’s a preliminary list of improvements that will have Jiras written for them:

1. More Robust Pricelist Import
2. Fuzzy Name Handler - stores, routes, discounts, items types, special cares. I imagine this to similar to the import reconciliation that Mailchimp provides:



   This would let you map misspellings like the “Store2” example, or create new objects.

3. No Customer ID report handling - we need to create tools that can handle reports without a customer ID specified so that no one has to go into Excel and use formulas to get a flawed import file.
4. SPOT report handlers - Tools that handle each of the report formats that currently require manual manipulation.
5. Credit Card Import Tool - Ability to import the CC token value of a customer in the customer import, and then a new import tool for Credit Cards that securely matches the token to the customer.
6. Offline Tool for Merges - SPOT Inventory, SPOT Balances, etc.

7. Offline Tool Improvements for Generic Data systems, or creating .