

Manual Insurance Tracking (incl. JustGo Import)

In Manual mode, your club records each member's insurance in A2B Manager, either one member at a time on the Members page or in bulk by importing your JustGo club members export. This guide covers setting up Manual mode, insurance levels, setting and removing cover, expiry reminders and the JustGo import. Missing or expired insurance doesn't stop anyone booking, and parents never see insurance details.

Setting up Manual insurance tracking and importing from JustGo

1. Open the Insurance tab (0:00)

- In the left-hand menu, click **Settings Hub**. In the **System Settings** section, click the **Settings** card.
- Click the **Insurance** tab. The panel is headed **Insurance tracking**.

The screenshot shows the A2B Manager interface with the 'Insurance' tab selected in the 'System Settings' section. The left-hand menu includes 'Settings Hub' and 'Quick Links'. The main content area displays 'General Settings' for 'Insurance tracking'. It features three summary cards: 'TOTAL DAYS OPEN' (324), 'TOTAL DAYS CLOSED' (41), and 'CLOSED PERIODS' (2). Below these is a 'Closed dates' section with a table of closed periods. The first period is '01 December 2026 - 30 December 2026' (30 days, 6 classes), and the second is '06 Jul 2027 - 16 July 2027' (11 days, 6 classes, new bookings closed). Each period has a table of activities and their scheduled times.

Activity	Groups	Times
Pre School	All groups	Monday 16:00
School Holiday Activities	All groups	Thursday 10:00
Mens Artistic	All groups	Monday 17:00 - Wednesday 17:00 - Friday 17:00
Parent and Toddlers	All groups	Saturday 11:00
Recreational	All groups	Monday 16:00 - Monday 17:00
Womens Artistic	All groups	Tuesday 17:00 - Thursday 17:00 - Saturday 09:00

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Recreational	All groups	Monday 16:00 - Monday 17:00
Parties	All groups	Sunday 09:00 - Saturday 13:00
Womens Artistic	All groups	Tuesday 17:00 - Thursday 17:00 - Saturday 09:00

2. Choose Manual and add your levels (1:04)

- Under **Tracking mode**, choose **Manual — admins set insurance on the Members page**. (There's another tracking mode, which isn't covered here.)
- Under **Insurance levels**, type a level name and click **Add**. You can add up to 20 levels, each up to 40 characters. Levels are optional unless you import from JustGo.
- If you're importing from JustGo, add levels named exactly like your JustGo membership types, for example **Community**, **Competitive**, **National** and **Enhanced**. Any row whose membership type doesn't match a saved level won't import.
- **Remove** takes a level away straight away, with no confirmation. It doesn't change members who already have that level.

The screenshot shows the A2B Manager - Demo web application. On the left is a sidebar with a user profile for 'Grok Bot' and a menu with options like 'Return to Home', 'Dashboard', 'Class Management', 'Shop (Admin View)', 'Member Management', 'Financials', 'Settings Hub' (highlighted), and 'Quick Links'. The main content area is titled 'General Settings' and contains a breadcrumb trail: 'Addresses > Registration questions > Education years > Club docs > Session security > Insurance > Text messages > Club payment card'. The 'Insurance' section is active, showing 'Insurance tracking' settings. It includes a 'Tracking mode' dropdown set to 'Manual — admins set insurance on the Members page'. Below this is a list of 'Insurance levels' with input fields for 'Bronze', 'Silver', 'Gold', and 'JustGo Demo Level', each with a 'Remove' button. An 'Add' button is at the bottom of the list. A note explains that in Manual mode, users tick insurance on the Members page and enter an insurance number. The 'Import insurance' section has a 'Choose File' button and a 'No file chosen' status. A note mentions uploading a CSV with student details and insurance levels, with a 'Download example' link. At the bottom, there are two checkboxes: 'Notify me when insurance is expiring' and 'Don't charge insurance again if the member already has cover'.

General Settings
Configure when you're closed, who emails come from, and what parents must answer when they register.

Addresses > Registration questions > Education years > Club docs > Session security > **Insurance** > Text messages > Club payment card

Insurance tracking

For tracking only — A2B Manager does not provide insurance cover for activities. Choose whether admins set status manually, or it updates from insurance subscriptions in Stripe. For an all-in-one solution with no tracking needed, contact info@gymclubsolutions.co.uk.

Tracking mode

Manual — admins set insurance on the Members page

In Manual mode, ticking insurance on the Members page asks when cover expires, and you can enter an insurance number. If you have added insurance levels, you choose a level at the same time. The number, level, and expiry date show in the Insurance column, and members show as expired once that day has passed.

Insurance levels

Bronze	Remove
Silver	Remove
Gold	Remove
JustGo Demo Level	Remove
e.g. Gold	Add

Optional. Add the levels you offer, such as Bronze, Silver, and Gold. When you tick a member you choose one of these with the expiry date. Removing a level here does not change members who already have it. Save settings before you import, so the file can use these levels.

Import insurance

Choose File No file chosen

Upload a CSV with student first name, student last name, expiry date (DD/MM/YYYY), insurance number, and insurance level. Every column is required. You can also upload a JustGo club members export, the Excel file or a CSV saved from it. [Download example](#)

☐ Notify me when insurance is expiring
We'll add a reminder to your notifications bell when members are getting close to their expiry date.

☐ Don't charge insurance again if the member already has cover

3. Set reminders and save (1:44)

- To get a reminder in your notifications bell, tick **Notify me when insurance is expiring**.
- Under **Remind me before expiry**, tick one or more of **1 day**, **7 days**, **14 days** and **28 days**. Each one adds a separate reminder.
- A reminder is only created on the day a member's cover is exactly that many days from expiring, so tick more than one if you want a safety net.
- Click **Save settings**. You'll see Insurance settings saved. You must save in Manual mode, with your levels, before you import.

A2B Manager - Demo

Search by name, email, phone, class or group...

Grok Bot
grokbot@mail.com

Return to Home

PARENT

ADMIN

Dashboard

Class Management

Shop (Admin View)

Member Management

Financials

Settings Hub

Quick Links

Documentation

Logout

subscriptions in Stripe. For an all-in-one solution with no tracking needed, contact info@gymclub solutions.co.uk.

Insurance settings saved.

Tracking mode

Manual — admins set insurance on the Members page

In Manual mode, ticking insurance on the Members page asks when cover expires, and you can enter an insurance number. If you have added insurance levels, you choose a level at the same time. The number, level, and expiry date show in the Insurance column, and members show as expired once that day has passed.

Insurance levels

Bronze	Remove
Silver	Remove
Gold	Remove
JustGo Demo Level	Remove

e.g. Gold [Add](#)

Optional. Add the levels you offer, such as Bronze, Silver, and Gold. When you tick a member you choose one of these with the expiry date. Removing a level here does not change members who already have it. Save settings before you import, so the file can use these levels.

Import insurance

[Choose File](#) No file chosen

Upload a CSV with student first name, student last name, expiry date (DD/MM/YYYY), insurance number, and insurance level. Every column is required. You can also upload a JustGo club members export, the Excel file or a CSV saved from it. [Download example](#)

☒ Notify me when insurance is expiring

We'll add a reminder to your notifications bell when members are getting close to their expiry date.

Remind me before expiry

☐ 1 day ☒ 7 days ☐ 14 days ☐ 28 days

Pick as many as you like. Each one gives you a separate reminder, so 7 and 28 days means an early warning and a last chance to renew.

☐ Don't charge insurance again if the member already has cover

When booking another class that includes insurance, keep their existing cover and only charge for the class.

<https://dev.a2bmanager.com/content/insurance-import-example.csv>

4. Import your JustGo file (2:21)

- In JustGo, export your club members list as Excel or CSV. A2B Manager recognises it from its headings: **Firstname**, **Surname**, **Expiry Date**, **MID** and **Membership Type** (the sheet is called Club Members). Other columns are ignored.
- The MID becomes the insurance number, and the membership type becomes the level.
- Under **Import insurance**, click **Choose File** and pick the file (under 5 MB).
- Not using JustGo? Click **Download example** for a CSV with the columns Student first name, Student last name, Expiry date, Insurance number and Insurance level. Use these headings exactly. Every column is required.
- The review shows how many members are ready to update. Members are matched by first and last name. If more than one member has the same name, choose the right one from the list.

The screenshot displays the A2B Manager - Demo web application. The left sidebar contains a navigation menu with options: Grok Bot, Return to Home, PARENT, ADMIN, Dashboard, Class Management, Shop (Admin View), Member Management, Financials, Settings Hub (highlighted), and Quick Links. The main content area is titled 'Insurance settings saved.' and includes a search bar. Below this, the 'Tracking mode' is set to 'Manual — admins set insurance on the Members page'. A section for 'Insurance levels' lists Bronze, Silver, Gold, and JustGo Demo Level, each with a 'Remove' button. An 'Add' button is also present. A note explains that optional levels like Bronze, Silver, and Gold can be added. The 'Import insurance' section shows a 'Choose File' button and a text input field containing 'justgo-demo-members.csv'. Below this, a message states '2 members ready to update.' with an 'Update members' button. At the bottom, there is a checkbox for 'Notify me when insurance is expiring' and a 'Remind me before expiry' section with radio buttons for 1 day, 7 days (selected), 14 days, and 28 days.

5. Update members (2:51)

- Click **Update members**. The **Insurance updated** summary lists each member's insurance number, level and expiry. Click **Close**.
- The import overwrites any cover a member already has, without warning, even if the new expiry date is earlier.
- If a file has two rows for the same person, the second row is rejected with This name is already in the file.
- Rows without a membership type or expiry date fail. They're listed under **Rows that were not updated**; click **Download rows to fix** to get them as a file.
- The import only updates insurance. It doesn't add members or change any other details.

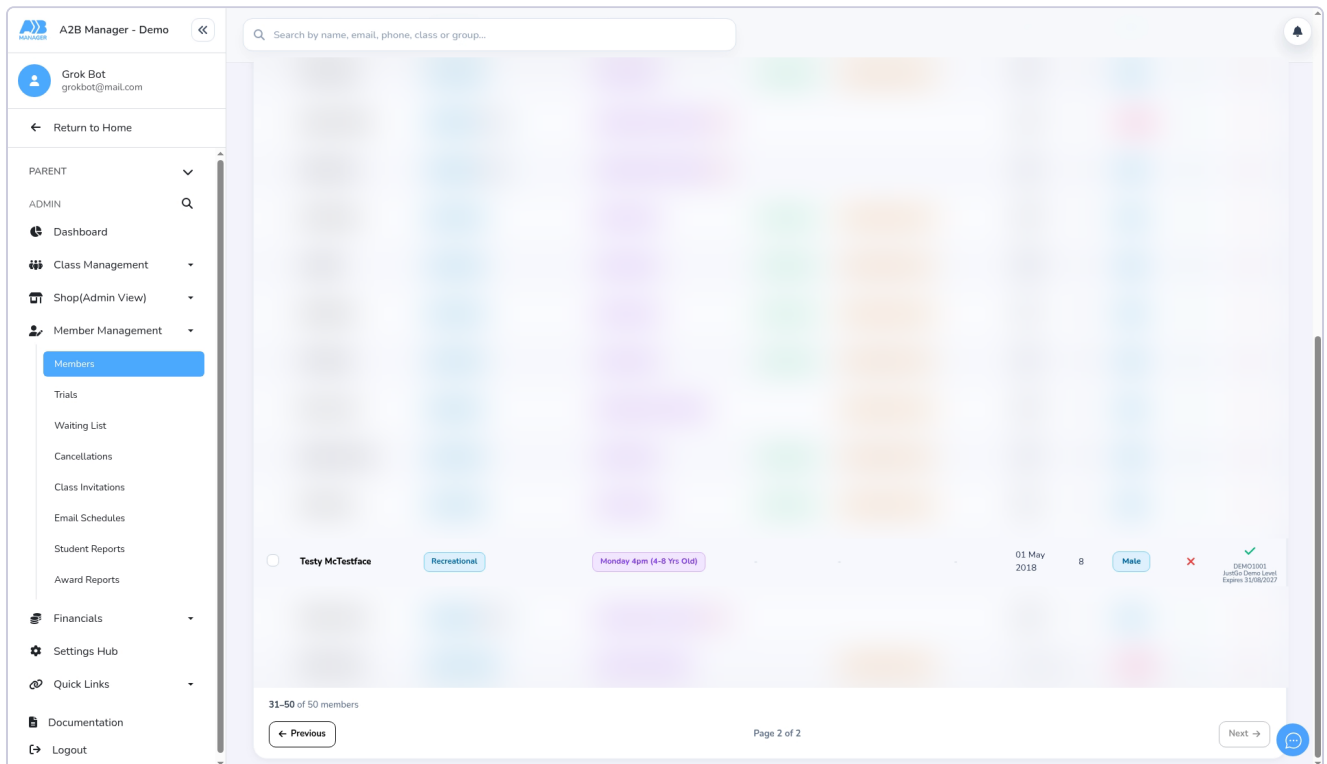
The screenshot shows the A2B Manager - Demo interface. A modal titled "Insurance updated" is displayed, showing a summary of 2 members updated. The modal contains a table with the following data:

Member	Insurance number	Level	Expiry
Testy McTestface	DEMO1001	JustGo Demo Level	Expires 31/08/2027
Dummy Doe	DEMO1002	JustGo Demo Level	Expired 01/09/2026

Below the table is a "Close" button. The background interface shows the "Import insurance" section, which includes a "Choose File" button, a file name "justgo-demo-members.csv", and a "2 members updated" status. There are also options to "Remove" or "Add" insurance levels (Bronze, Silver, Gold, JustGo Demo Level) and a "Notify me when insurance is expiring" checkbox.

6. Check the Members page (3:14)

- Go to **Member Management > Members**. The **Insurance** column shows each member's insurance number, level and Expires date, or Expired once the date has passed.
- The member's profile also shows Insurance expires ..., Insurance expired ... or No insurance.



Setting cover for one member

- On the **Members** page, click the member's **Insurance** cell. In **Insurance expiry date**, enter the expiry date, an optional **Insurance number** and an **Insurance level** (needed if you've added levels), then click **Save**.
- To remove cover, click an insured member's **Insurance** cell. Cover is removed straight away, with no confirmation.

Renewing cover

- There's no edit option. To renew, remove the member's cover, then set it again with the new expiry date. You can also re-import an up-to-date JustGo file.
- If a member's cover has already expired, there may be no remove option. Set the cover again with the new date instead.

Good to know

- Insurance tracking is for your records only. Missing or expired insurance doesn't stop a member booking.

- Parents never see insurance details in their account.
- Matching is by name only, so check the review count before you click **Update members**. Inactive members can be matched too.