

Booking-system migration checklist

A 62-point plan for moving accommodation bookings, guest records, payments and operating workflows without relying on memory at cutover.

The non-negotiable rule

Do not judge success by whether an import finishes. Reconcile future bookings, money and live operating tasks before the new system becomes the source of truth.

Business / park		Migration lead	
Current system		New system	
Target go-live		Supplier lead	

Use this checklist with your current supplier, shortlisted vendor, finance lead and frontline team. Adapt it to your park, campsite, glamping site or accommodation business.

PHASE 1 OF 6

Scope the move

Agree what is moving, who owns each decision and what success looks like before anyone touches live data.

- ☐ Name one migration lead with authority to make day-to-day decisions.
- ☐ List the operational reason for changing systems and the outcomes the team expects.
- ☐ Define which parks, accommodation, users and workflows are in scope.
- ☐ Record what will stay in separate tools, including owner, maintenance, finance or retail systems.
- ☐ Choose a target go-live window outside the busiest arrival and booking periods where possible.
- ☐ Write the supplier-versus-operator responsibilities for configuration, import, testing and training.
- ☐ Confirm the current supplier's notice period, export process and read-only access after termination.
- ☐ Create a shared issue log, decision log and contact list for the project.

Decisions and exceptions

Note / decision		Owner / date
Note / decision		Owner / date
Note / decision		Owner / date

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Inventory and protect the data

Decide what must transfer, what can remain in an archive and how personal data will move securely.

- ☐ Export every future booking, including status, dates, accommodation, party and booking source.
- ☐ Export guest contact records and identify duplicates, incomplete records and marketing permissions.
- ☐ Export payments, deposits, balances, due dates, refunds and payment references.
- ☐ Export accommodation, grades, pitches, capacities, accessibility information and out-of-service dates.
- ☐ Export prices, rate plans, stay packages, restrictions, discounts, extras and deposit rules.
- ☐ Export notes, special requirements, vehicle details, pets and operational flags needed for future stays.
- ☐ List historical records that must remain accessible for finance, service or legal reasons.
- ☐ Agree a unique identifier that lets the old and new record be matched during reconciliation.
- ☐ Clean obvious duplicates and invalid records without changing the original export.
- ☐ Store an untouched backup of every source export with the date, time and exporting user recorded.
- ☐ Use an approved secure transfer method and restrict access to the smallest practical project team.
- ☐ Document the retention and deletion plan for working files after the migration is signed off.

Decisions and exceptions

Note / decision		Owner / date
Note / decision		Owner / date

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Configure the new system

Build the target setup from agreed rules, then check it before importing production bookings.

- ☐ Create parks, accommodation, grades and bookable inventory with the correct operating dates.
- ☐ Configure occupancy, suitability, allocation and maintenance-closure rules.
- ☐ Rebuild nightly, fixed-break, per-person or per-pitch pricing as required.
- ☐ Configure minimum stays, arrival rules, peak overrides, discounts, extras and taxes.
- ☐ Configure deposit, pay-in-full, balance due and cancellation rules.
- ☐ Create user roles using least privilege and remove generic shared accounts where practical.
- ☐ Set up booking confirmations, balance reminders and operational messages that are in scope.
- ☐ Configure direct-booking branding, policies and the complete mobile guest journey.
- ☐ Map reports needed for arrivals, departures, balances, occupancy, revenue and booking source.
- ☐ Record every configuration decision that differs from the previous system.

Decisions and exceptions

Note / decision		Owner / date
Note / decision		Owner / date
Note / decision		Owner / date

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Map integrations and channels

Treat every connection as its own mini-migration with an owner, test cases and a recovery route.

- ☐ List every system that sends or receives availability, rates, bookings, payments or guest data.
- ☐ Record whether each connection is native, API-based, iCal, file-based or manual.
- ☐ Confirm which integrations are live today rather than promised on a roadmap.
- ☐ Map accommodation, rate plans, taxes, extras and cancellation policies for each channel.
- ☐ Connect the payment provider and confirm settlement, refund and chargeback responsibilities.
- ☐ Test accounting, email, access-control, CRM, reporting and website connections that are in scope.
- ☐ Assign support ownership and an escalation contact for every third-party connection.
- ☐ Write the channel freeze, disconnect and reconnect sequence for cutover.

Decisions and exceptions

Note / decision		Owner / date
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Note / decision		Owner / date

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Import, test and reconcile

Use measurable checks. 'The import completed' is not the same as proving that the park can operate.

- ☐ Run a test import using a copy of real data before the final migration.
- ☐ Compare record counts for future bookings, guests, accommodation and payments.
- ☐ Reconcile booking values, deposits received and outstanding balances to source totals.
- ☐ Spot-check arrivals in the next 7, 30, 90 and 365 days.
- ☐ Check amended, cancelled, reinstated, group, multi-unit and zero-balance bookings.
- ☐ Verify dates, prices, taxes, extras, notes, payment history and booking source on sampled records.
- ☐ Complete a direct mobile booking with a deposit and confirm it reaches the operating view.
- ☐ Take a booking by phone, amend it, move accommodation, cancel it and reinstate it.
- ☐ Test that every live integration moves the expected information in both directions.
- ☐ Run arrival, departure, balance and revenue reports and compare them with the source system.
- ☐ Record defects with an owner, severity, fix and retest result.
- ☐ Obtain written sign-off on the test import and the final cutover criteria.

Decisions and exceptions

Note / decision		Owner / date
Note / decision		Owner / date

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Train, cut over and stabilise

Plan the exact sequence from the final source export to the first verified booking in the new system.

- ☐ Train each role with real tasks, including amendments, payments, arrivals and exception handling.
- ☐ Name a trained super-user for each shift during the first operating week.
- ☐ Issue a cutover runbook with timings, owners, contacts and decision points.
- ☐ Confirm the final booking freeze, export, import and channel-switch windows.
- ☐ Take a final source backup and record the last booking or transaction included.
- ☐ Complete the final import and repeat the agreed count, value and spot-check reconciliation.
- ☐ Update the website Book Now route and verify a live test reservation from a phone.
- ☐ Reconnect channels and check availability before reopening every sales route.
- ☐ Keep a defined rollback or containment plan until the cutover criteria are met.
- ☐ Run scheduled checks during day one for new bookings, payments, messages and integrations.
- ☐ Keep the old system read-only for the agreed archive period.
- ☐ Review the issue log daily, close migration files securely and hold a formal post-go-live sign-off.

Decisions and exceptions

Note / decision		Owner / date
Note / decision		Owner / date

FINAL SIGN-OFF

Ready to make the new system primary?

Complete this page only after the final import and reconciliation. Record any accepted exception in the project log.

- ☐ Future booking counts and sampled records match the agreed source export.
- ☐ Booking values, deposits received and outstanding balances reconcile.
- ☐ Direct booking and all in-scope channels are open and verified.
- ☐ Payment, email and operational integrations have passed live tests.
- ☐ Arrival-day reports and staff workflows have been checked by the operating team.
- ☐ Support contacts, issue ownership and the rollback or containment route are current.
- ☐ The legacy system and working migration files have approved retention and deletion dates.
- ☐ The migration lead and operational owner approve the new system as the source of truth.

Migration lead		Date	
Operational owner		Date	
Supplier lead		Date	

Need a second pair of eyes?

Keydesk offers hands-on early-access setup for suitable holiday parks, campsites and glamping operators. Visit keydesk.co.uk/switch-to-keydesk to discuss your current system and migration route.

This operational checklist is not legal, accounting or information-security advice. Confirm your obligations and the controls appropriate to your business.