Studio booking migration checklist

Start before you cancel the old service. Write down the key dates, confirm what you can export, and keep a protected copy while you check the move.

Studio name

Current booking system

Target changeover date

Person coordinating the move

Before you close the current account

- [ ] Check renewal, cancellation and export-access dates with your current provider.
- [ ] Choose a changeover date and decide how long you need the old schedule available for checking.
- [ ] List the customer, service and appointment information your studio actually needs to keep.
- [ ] Confirm what the current service can export and in which file format; do not assume another system can import it.
- [ ] Open a sample export and check names, contact details, appointment dates, times and time zone information.
- [ ] Store the copy securely, limit access and follow your studio's record-retention requirements.
- [ ] Keep access to the old service until you have checked the replacement setup and future appointments.

Export or account deadline to remember

Questions to confirm with your current provider

Map services, staff and rooms

Capture the working details that determine whether an appointment really fits. Use one row for each service you offer.

Service and resource map

Service	Minutes + reset	Practitioner(s)	Room / equipment

Check the real availability

- [ ] Record each practitioner's regular hours, breaks, time zone and planned time off.
- [ ] Check which shared treatment room or equipment each service needs, and when it is available.
- [ ] Allow for setup or reset time between clients wherever the new schedule supports it.
- [ ] Compare the service, practitioner and room requirements together; each must be free for the full appointment.

Availability details or conflicts to resolve

Review customers and open bookings

Make a separate plan for records and commitments that need a person to check them. A file export alone does not confirm that a future booking has carried over.

Record the size of the handover

Open appointments to review

First appointment date affected

Customer records to retain

Person checking appointment details

Customer and payment commitments

- [ ] Compare future appointments one by one: date, time, service, practitioner, room, contact and current status.
- [ ] Decide how each open appointment will be kept, recreated or handled; confirm what the receiving system supports.
- [ ] Tell affected customers what is changing and how they can check, change or cancel their appointment.
- [ ] List any outstanding package sessions, gift-card value, deposits or refunds separately, with their existing terms.
- [ ] Do not promise that customer records, package balances or payments will transfer until the receiving service confirms how they are handled.
- [ ] Keep only the customer information you need, store it securely and give access only to the people who need it.

Prepaid commitments and their agreed handling

Customer questions or follow-up owner

Test, tell clients and switch

Set the new booking path up before you share it. Keep the old schedule available until you have reconciled the appointments that matter.

Before clients use the new link

- [ ] Compare the new service names, prices, lengths and policies with your approved studio information.
- [ ] Check practitioner hours, room availability and reset time against a typical busy day.
- [ ] Use a test booking to check the customer steps, confirmation details and the correct appointment time.
- [ ] Test what happens when an appointment is changed or cancelled, including what the customer is told.
- [ ] Check the booking link on a phone and desktop; correct unclear instructions before sharing it.
- [ ] Reconcile future appointments and customer contact details; resolve missing or duplicate records.
- [ ] Give clients the new link and a clear changeover date; explain what they need to do about existing bookings.
- [ ] Stop new bookings in the old system only when you are ready, and retain access until the handover is checked.

Finish the handover

Date the new booking link will be shared

Person who approves the switch

What still needs a decision or a follow-up

Ready when the details match, the customer flow works, and someone owns the open questions.