

Restaurant Reservation System Migration Checklist

A restaurant reservation system migration checklist for data exports, future bookings, payments, channel cutover, staff training, and launch validation.

How to use this checklist

Complete it with the people responsible for reservations, payments, channels, and service. Assign an owner and record completion evidence before checking an item.

Before you choose a cutover date

☐	Name one accountable migration owner and one decision-maker for exceptions.
☐	Choose a target launch date plus a fallback date.
☐	List services that cannot tolerate disruption: prime dinner, private dining, events, tasting menus, and group bookings.
☐	Agree when the old system stops accepting new bookings and how existing reservations remain accessible.
☐	Define the reconciliation window in which both systems may contain active records.
☐	Schedule staff training and a monitored first week before publishing the new links.

1. Secure exports and define data ownership

☐	Future reservations with date, time, party size, status, service, area, table assignment, source, and confirmation mode.
☐	Guest contact details, notes, preferences, tags, accessibility needs, dietary information, and visit history where contractually and legally available.
☐	Marketing consent records with source, scope, language, and timestamp rather than a single unexplained yes-or-no field.
☐	Cancellation, no-show, refund, dispute, and payment references needed to answer later guest questions.
☐	Experience, menu, area, table, shift, pacing, duration, blackout, and party-size configuration.
☐	Reports needed for financial reconciliation, source attribution, and historical comparison after the old dashboard closes.

2. Protect future bookings, payments, and guest commitments

☐	Standard reservation Migration check: Status, date, time, party size, service, area, source, notes, and change history are preserved. Guest-facing outcome: The guest arrives to the booking the restaurant already confirmed.
☐	Deposit or prepayment Migration check: Amount, currency, payment state, refund state, provider reference, and policy version remain reconcilable. Guest-facing outcome: The guest is not asked to pay twice and staff can explain the balance.
☐	Card guarantee or hold Migration check: The team knows whether the old authorization or stored-payment agreement remains usable and permitted. Guest-facing outcome: No fee is attempted without a valid policy, payment basis, and staff review.
☐	Gift card or voucher Migration check: Issued value, code, balance, currency, expiry, redemption history, and booking attachment are understood. Guest-facing outcome: The guest can use valid value without manual guesswork.
☐	Experience or add-on Migration check: The selected menu, package, seating, quantity, price, tax treatment, and fulfillment notes move with the reservation. Guest-facing outcome: Kitchen and front-of-house see what was sold, not only a table time.

3. Rebuild availability, tables, and policies

☐	Services and shifts by day, time, duration, booking window, and advance notice.
☐	Areas, tables, combinations, capacity, accessibility, pacing, and turn-time rules.
☐	Party-size minimums and maximums, large-party workflows, and request-only inventory.
☐	Special days, holidays, closure periods, events, blackout times, and seasonal areas.
☐	Instant confirmation versus restaurant approval for each booking type.
☐	Cancellation windows, no-show rules, deposits, prepayment, optional prepayment, card guarantees, refunds, and grace periods.
☐	Experiences, menus, add-ons, gift cards, private dining, and seating choices that must appear in the public journey.

4. Plan every channel cutover

☐	Website header, navigation, booking page, embedded widget, footer, contact page, and location pages.
☐	Google Business Profile booking links, Reservations End-to-End partner routing, and any payment redirect.
☐	Instagram, Facebook, TikTok, WhatsApp, email signatures, newsletters, and profile-link tools.
☐	QR codes on menus, windows, hotel desks, printed cards, receipts, and event materials.
☐	Paid ads, organic landing pages, influencer links, partner pages, and campaign UTMs.
☐	Phone, email, walk-in, concierge, hotel, and staff-created reservation procedures.
☐	Marketplace profiles that remain active for incremental discovery after the direct cutover.

5. Train staff with live-service scenarios

☐	Find and change an imported future reservation.
☐	Create a phone or walk-in booking with the correct source and notes.
☐	Approve and decline a request-only reservation.
☐	Recognize pending payment, paid, refundable, refunded, failed, and disputed states.
☐	Handle a late cancellation, no-show review, guest grace case, and restaurant-side cancellation.
☐	Apply or verify a gift card, voucher, add-on, experience, deposit, or prepayment.
☐	Explain where Google, website, marketplace, campaign, and staff-entered reservations appear.
☐	Escalate a missing booking, duplicate record, availability mismatch, or payment discrepancy.

6. Validate before and after launch

☐	Before launch Required checks: Imports reconcile, availability tests pass, policies display correctly, payment paths work, and staff complete scenarios. Completion evidence: Signed checklist with counts, test bookings, named owners, and unresolved exceptions.
☐	At cutover Required checks: Every public link reaches the intended localized booking journey and creates the correct source. Completion evidence: Mobile and desktop link checks plus successful test reservations from priority channels.
☐	First service Required checks: Hosts can find imported and new bookings, understand payment state, and act on requests or changes. Completion evidence: Shift debrief with every issue assigned, not left in chat.
☐	First week Required checks: Booking volume, availability failures, source mix, payment failures, cancellations, no-shows, and guest questions are reviewed daily. Completion evidence: Daily reconciliation log and confirmed fixes.
☐	After stabilization Required checks: Old links are removed, required old records remain accessible, and the team uses the new system as the operating source. Completion evidence: Final sign-off with remaining contractual, financial, or data-retention tasks.

A copyable migration workplan

☐	Ownership and dates: accountable owner, launch date, fallback date, vendor contacts, and escalation path.
☐	Data: export scope, cleanup, mapping, import, record counts, exceptions, retention, and deletion responsibilities.
☐	Bookings: future reservations, requests, changes, cancellations, notes, experiences, and table assignments.
☐	Payments: deposits, prepayment, card guarantees, gift cards, refunds, disputes, provider references, and reconciliation.
☐	Configuration: services, shifts, tables, areas, pacing, party sizes, special days, policies, languages, and notifications.
☐	Channels: website, Google, social, QR, campaigns, marketplaces, partners, phone, email, and staff entry.
☐	People: role-based training, launch-day coverage, support ownership, and service debriefs.
☐	Validation: pre-launch tests, cutover checks, daily monitoring, issue ownership, and final sign-off.

Common migration failures

☐	Public links change before imports are reconciled Why it happens: The visible launch is treated as the project milestone. Prevention: Make future-booking counts and exception review a launch prerequisite.
☐	The new calendar copies opening hours Why it happens: Availability logic is reduced to times instead of services, tables, pacing, and rules. Prevention: Test positive and negative combinations by date, party size, service, and area.
☐	Payment state becomes a note Why it happens: Money and booking data are migrated separately. Prevention: Reconcile amount, currency, status, policy, provider reference, refund, and guest obligation together.
☐	Google and website use different rules Why it happens: Channels are configured as separate calendars. Prevention: Connect each channel to the same live availability and lifecycle ownership.
☐	Staff train after launch Why it happens: Configuration receives attention while service scenarios do not. Prevention: Require role-based scenario completion before public cutover.
☐	The old system disappears too early Why it happens: Contract end, data retention, and operational access are treated as the same date. Prevention: Document read-only access, exports, financial records, guest support, and deletion timing separately.

Migration sign-off

Accountable owner	
Target cutover date	
Fallback date	
Old-system access confirmed until	
Final approval	

Prepared from Reslify's operational migration guide. This is practical product and operations guidance, not legal, payment, or data-protection advice.

Full guide and context: <https://reslify.com/en/blog/restaurant-reservation-system-migration-checklist/>

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