Switching Your PMS Without Flying Blind

/ Checklist for hotels

A PMS (property management system) is the program in which a hotel keeps reservations, guests, rooms and invoices. Switching it means taking data along and connecting other programs again. This checklist helps you forget nothing: part 1 applies to any new provider, part 2 to starting with felixUnity. Tick off what is settled in your house.

PART 1 Switching to a new PMS

Applies to any provider

1 Prepare

- [ ] **Set a goal.** What should get better, and how will you see it? For example: less time per arrival.
- [ ] **Name the people in charge.** Who leads the switch, who tests, who signs off?
- [ ] **Check the old contract.** When does it end, by when must you give notice, and in what form do you get your data back?

2 Clarify data and connections

- [ ] **Choose the data.** What should come along: rooms, prices, guest profiles, future reservations, open invoices? Clean up duplicate and outdated entries first.
- [ ] **List the connections.** Which programs does the PMS work with (interfaces)? For example point of sale, room keys, accounting, booking portals, website.
- [ ] **Ask the provider.** What will they transfer for sure, what is still open? Put commitments in writing.

3 Test and train

- [ ] **Test with real cases.** Group booking, cancellation, deposit, company invoice.
- [ ] **Set permissions.** Who may cancel or change prices?
- [ ] **Train the team.** Shortly before the start, with a short guide for the front desk.

4 Switch over

- [ ] **Choose a quiet day.** Few arrivals, not in peak season.
- [ ] **Run one system.** From the cut-over day, data is entered only in the new system. The old one is for looking things up.
- [ ] **Have a fallback plan.** Print the arrivals list and decide when you go back to the old system.

5 After the start

- [ ] **First week.** Collect briefly each day what is not right and clear it with the provider.
- [ ] **After 30 days.** Check the goals from step 1: has anything improved?
- [ ] **End the old system properly.** Clarify retention periods for invoices with your tax adviser, then close access and have the deletion of your data confirmed in writing.

Five questions for every new provider

1. Which of my data do you transfer, and when do you commit to that?
2. Which connections to my programs already exist, which have to be built?
3. Who accompanies us until the start and afterwards?
4. What happens if something does not work on the cut-over day?
5. How do I get my data out again later?

PART 2 Starting with felixUnity

How it works with us

With felixUnity you get a fixed contact (project manager) and a project plan. How long the start takes depends on your data, connections and processes. We do not name a blanket duration.

1 Getting to know each other

- [ ] **Discuss goals and processes.** Together we record your goals, processes, roles and the programs you use today.
- [ ] **Choose areas.** Clarify which felixUnity areas you need and whether they are available for your project.

2 Planning

- [ ] **Set the scope.** Data, connections, a first area for the start (pilot) and the cut-over day.
- [ ] **Have the data transfer checked.** We look at the source system, the amount of data and its quality. A binding commitment comes only after this technical check.
- [ ] **Clarify contracts.** Contracts and access for your other programs. Then you receive the project plan with people in charge and schedule.

3 Set up and test

- [ ] **Create rooms and categories.** We set up the system and test with real cases from your daily work.
- [ ] **Agree on acceptance.** What has to work for you to sign off? That is fixed beforehand.
- [ ] **Train key people.** The key users get to know the system first.

4 Start and review

- [ ] **Begin small.** You start in a limited area. The old system keeps running until the new process holds.
- [ ] **Know the fallback and support plan.** Who helps, and what do you do if something does not work?
- [ ] **Measure the result.** Compare processing time and error rate before and after the start.

A guide, not legal or tax advice. The process with felixUnity is also described at www.felixunity.ai/en/migration.