Move the bookings. Keep the context.

Use a familiar job. Mark what you have checked, note the gaps and agree the next step with your team.

1. Find the records you actually rely on.

- ☐ Name the owner of each source file.
- ☐ Keep an untouched export before editing.
- ☐ Separate future work from archived records.

2. Clean meaning, not just formatting.

- ☐ Use consistent date and time formats.
- ☐ Separate booking status from payment status.
- ☐ Review duplicate clients and repeated booking references.

3. Map a small sample first.

- ☐ Match each source column to a supported destination.
- ☐ Check required fields and rejected rows.
- ☐ Keep an explicit list of information that did not transfer.

4. Reconcile the result in the new workspace.

- ☐ Open several individual imported records.
- ☐ Confirm money and dates rather than trusting a total alone.
- ☐ Check driver, client and partner relationships where supported.

5. Choose one place for the next change.

- ☐ Name the system of record after the transition.
- ☐ Brief the office and drivers on the new workflow.
- ☐ Keep a checked archive and a list of outstanding corrections.

Our next step / owner / date

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