TaxiDex

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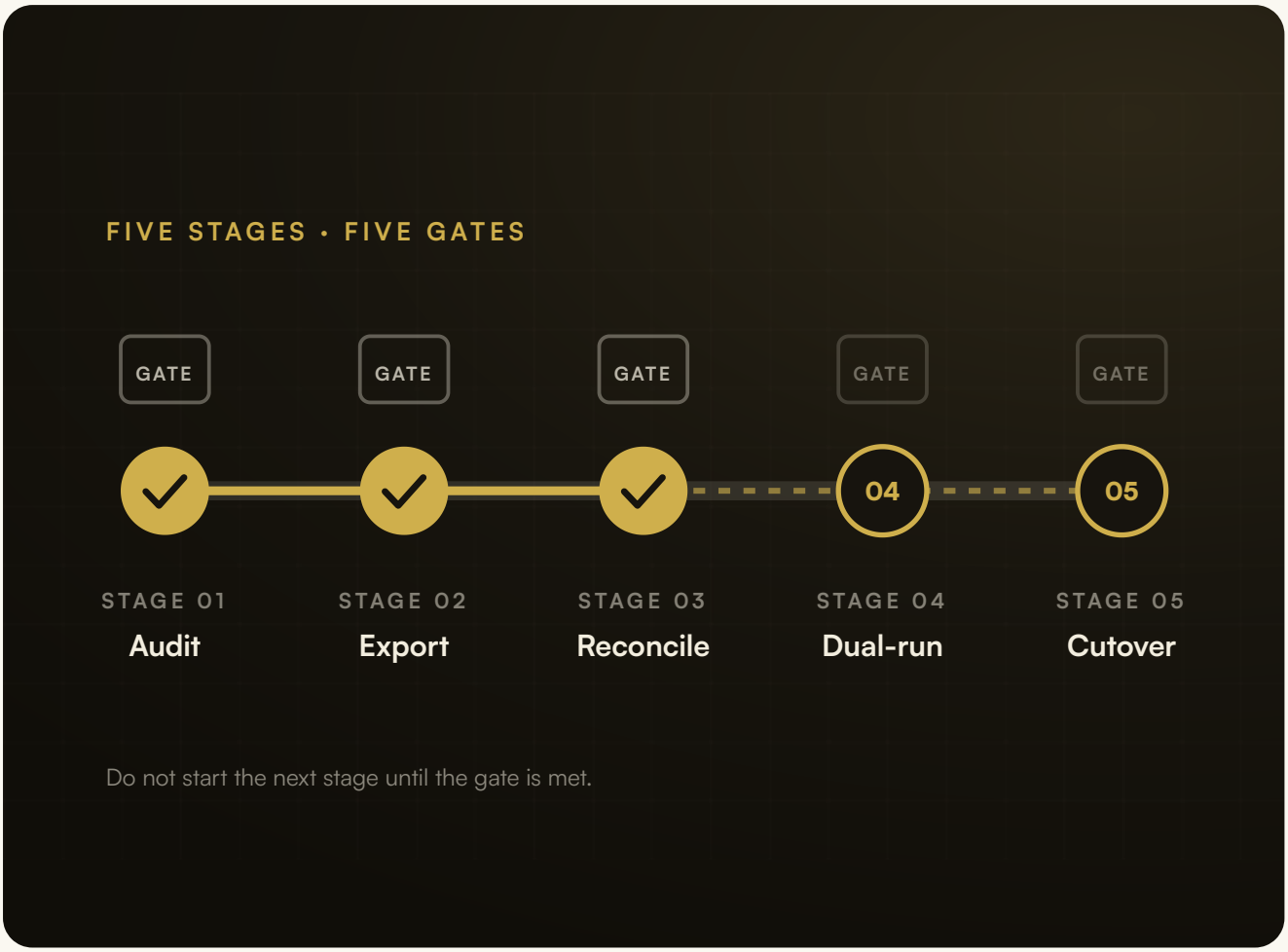

A VENDOR-NEUTRAL MIGRATION CHECKLIST

The Autocab Migration Checklist

Five stages, five gates, and the two letters you will need. Print it, put it on the control room wall, and tick as you go.

01 Five stages, each ending in a gate

02 Migration windows by fleet size

03 A driver letter and a customer letter, ready to send

04 A one-page wall version

START HERE

Leaving Autocab, step by step

A working checklist for a fleet planning to leave Autocab. Print it, put it on the control room wall, and tick as you go.

Every step here is vendor-neutral. It works whether you move to us, to a competitor, or between two systems we have never heard of. Nothing in this document requires you to buy anything.

Three rules the whole checklist is built on

1

Your operational data belongs to your business. Ask for it in an open format, in writing, while your contract is still live and support is still responsive.

2

Nothing depends on the new system until it has already been proven against your real jobs, on your own fleet.

3

A rollback is only real if the old system is still switched on.

The five stages

01	02	03	04	05
Pre-migration audit	**Export**	**Import and reconcile**	**Dual-running window**	**Cutover and decommission**
Page *3*	Page *4*	Page *5*	Page *6*	Page *7*

Each stage ends in a gate. Do not start the next stage until the gate is met.

Also inside

— Migration windows by fleet size 8

— Driver communication template 9

— Customer communication template 10

— The wall version: five gates on one page 11

● A NOTE ON WHERE THIS CAME FROM

This is a protocol, not a case study. It is written from how migrations of this kind succeed and fail generally, and it is deliberately vendor-neutral. Nothing here depends on which system you choose next, and no part of it is a claim about a particular fleet's results.

The full version of this protocol, including what gets caught at each stage and where it goes wrong without one, is published in full and ungated at taxidex.com/migration-protocol.

01

DO THIS BEFORE YOU TELL ANYONE

Pre-migration audit

Owner _____ Target date _____

CHECKLIST

- [ ] Contract end date confirmed in writing, not from memory
- [ ] Notice period confirmed in writing, and the date you must serve notice by written on the wall
- [ ] Auto-renewal clause checked — note whether notice must be served before a renewal window
- [ ] Data ownership clause located and quoted into your export request
- [ ] Early-termination or exit fees identified and costed
- [ ] Anything leased rather than owned listed: hardware, in-car units, PC licences, SIMs
- [ ] Third-party integrations inventoried: card terminals, phone system/VoIP, accounting, account-customer portals
- [ ] Booking sources inventoried: phone line, web booker, app, aggregator/affiliate feeds
- [ ] One named migration owner nominated — a dispatcher, not a committee
- [ ] Go-live date chosen away from your peak: not December, not a bank holiday, not race day

GATE Do not proceed until the notice date and the data-ownership clause are both in writing.

NOTES AND DATES

NOTES

02

REQUEST EARLY, IN WRITING

Export

Owner _____ Request sent on _____

CHECKLIST

- [ ] Export request sent in writing, citing your data-ownership clause and a response date
- [ ] Format specified as CSV or SQL — refuse PDF reports, which cannot be re-imported
- [ ] Customers, with saved addresses
- [ ] Account/corporate customers, with credit terms and billing contacts
- [ ] Drivers, with licence and document expiry dates
- [ ] Vehicles, with plate, licence and vehicle class
- [ ] Zones and zone boundaries
- [ ] Tariffs, fare rules, surcharges and account rates
- [ ] Trip history, for as far back as you need to keep
- [ ] Call recordings and compliance logs you are required to retain
- [ ] Anything you can only see on screen screenshotted before access ends

GATE Every file opens, has a header row, and is not empty. Check this the day it arrives, not the week you need it.

NOTES AND DATES

NOTES

03

THE STEP PEOPLE SKIP

Import and reconcile

Owner _____ Target date _____

CHECKLIST

- [ ] New system built with your real fleet structure, not a demo one
- [ ] Zones redrawn on the live map and visually compared against the old ones
- [ ] Tariffs and account rates rebuilt and attached to the redrawn zones
- [ ] Data imported in order: customers, account customers, drivers, vehicles, zones, tariffs, trip history
- [ ] Row counts compared old vs new for every single file — not a sample
- [ ] Any shortfall investigated and explained before you continue. A list that is 4% short does not announce itself; it announces itself on a Friday night as a regular whose saved address has vanished
- [ ] 20 real historical jobs priced through both systems — fares must match to the penny
- [ ] Spot-check the awkward ones on purpose: airport runs, waiting time, multi-drop, out-of-zone returns, account rates, minimum fares
- [ ] Driver document expiry dates checked — an expiry that failed to import is a compliance risk, not a data issue

GATE Counts agree and 20 fares match to the penny. If they do not, stop. Everything after this compounds.

ROW COUNTS, OLD VS NEW

FILE	OLD SYSTEM	NEW SYSTEM

04

BOTH SYSTEMS LIVE AT ONCE

Dual-running window

Owner _____ Window from / to _____

CHECKLIST

- [ ] Both systems running live; drivers carry both apps
- [ ] Old system remains authoritative — every real booking still rides on it
- [ ] New system shadow-dispatches in the background so nobody's job depends on it
- [ ] Allocations compared daily; each disagreement resolved as a rule fix, not a one-off override
- [ ] Account customers moved across early in this window, not late — corporate billing errors surface at month end, in front of the client, on an invoice
- [ ] Dispatchers trained on the live console during their own shifts, not in a classroom
- [ ] Awkward paths covered in training first: multi-drop, wait-and-return, card declined at the door, driver no-show, job returned to the queue
- [ ] Driver comms sent during this window, not on cutover day
- [ ] Customer notice sent to account customers and to anyone who books by a number or link that is changing
- [ ] Phone numbers, VoIP routing and the web booker embed tested end to end on the new system
- [ ] "Clean" defined in writing with your dispatchers: no lost jobs, no fare disputes, no driver escalations, no manual re-allocations above your normal rate

GATE Three consecutive days where the two systems agree on allocation and price, with no unexplained gaps.

DAILY COMPARISON

DAY	DISAGREEMENTS	RULE FIXED

05

SHIFT BY SHIFT

Cutover and decommission

Owner _____ Rollback trigger _____

CHECKLIST

- [ ] Cut over shift by shift, starting with the overnight shift — lowest volume, most forgiving
- [ ] Old system stays licensed and switched on throughout as your rollback
- [ ] Rollback trigger agreed in advance and known to every dispatcher on shift
- [ ] Named support contact reachable during the first live shift on each side
- [ ] Third clean consecutive day reached before decommissioning — two good days can be luck
- [ ] Final full archive exported before the licence lapses, stored somewhere you control
- [ ] Leased hardware returned and the return confirmed in writing
- [ ] Access revoked, direct debits and card mandates cancelled

! **Post-cutover review** held in week three, while the friction is still specific enough to fix.

NOTES AND DATES

NOTES

HOW LONG TO ALLOW

Migration windows by fleet size

Planning guidance for how long to allow, not measured averages. The setup work barely changes with fleet size; the parallel window is what should stretch, because it is the part that removes risk.

UNDER 25 VEHICLES

About 2 weeks

Single depot, clean data: roughly 3 days audit and export, a week running in parallel, then cut over shift by shift.

25—250 VEHICLES

3—5 weeks

Add depth to the parallel window rather than the setup. Account customers and their rates are usually what determines the date.

250+ OR MULTI-DEPOT

6—10 weeks

Run the parallel window per depot, cutting over one depot at a time with the others untouched as your control group.

● TWO THINGS STRETCH ANY OF THESE

Both are worth finding in week one: messy or incomplete data from the outgoing system, and different tariffs per depot. If your data is in poor shape, better to know it before you commit to a date than after.

● THE ONE THING NOT TO SHORTEN

The parallel window.

Migrations that go badly wrong nearly always shorten this step first.

Your plan

1 Audit and export

From _____ To _____

2 Import and reconcile

From _____ To _____

3 Dual-running window

From _____ To _____

4 Cutover, shift by shift

First shift _____ Decommission _____

TEMPLATE

Driver communication

Send during the parallel window, not on cutover day. Copy verbatim and fill in the brackets.

Subject: **New driver app from [DATE] — what changes and what does not**

Hi **[NAME]**,

From **[DATE]** we are moving to a new dispatch system. Here is everything you need to know.

What stays the same: your jobs, your patch, your pay rates, your settlement day, and who you call when something goes wrong. None of that changes.

What changes: you will use a new driver app. Download it here: **[LINK]**. Your login is **[LOGIN DETAIL]**. Please install it before **[DATE]** and sign in once so we know it works.

Between **[START DATE]** and **[END DATE]** both apps will be live. Keep using the old one for your jobs as normal — we are running the new one alongside it to check everything before we switch. We will tell you the exact day the new app becomes the real one.

On the day we switch, **[NAME]** will be on **[NUMBER]** for the whole shift. If a job does not come through, ring that number straight away rather than waiting.

If you cannot install the app or your login does not work, tell us now while there is time to fix it, not on the night.

Thanks,
[NAME], **[COMPANY]**

WHO HAS THE NEW APP

DRIVER	INSTALLED	SIGNED IN ONCE

TEMPLATE

Customer communication

Send to account customers and to anyone who books through a number, link or portal that is changing.

! Most private-hire passengers do not need to be told anything at all — **if nothing changes for them, do not create a change.**

Subject: **A small change to how you book with [COMPANY]**

Dear **[NAME]**,

We are upgrading the system we use to take and dispatch bookings. From **[DATE]** you may notice a few small differences.

What stays the same: your account, your agreed rates, your saved addresses, your booking history, your invoicing and your contacts here. All of it carries across.

What changes: [describe only what actually changes — for example the booking link, the app, the phone number, or the look of your confirmation emails]. If none of these apply to you, you will not need to do anything.

If you book through **[LINK OR NUMBER]**, please use **[NEW LINK OR NUMBER]** from **[DATE]**. The old one will keep working until **[DATE]**.

If anything looks wrong on a booking or an invoice after **[DATE]**, contact **[NAME]** on **[NUMBER]** or **[EMAIL]** and we will fix it the same day.

Thank you for bearing with us.
[NAME], **[COMPANY]**

WHO HAS BEEN TOLD

ACCOUNT CUSTOMER	NOTICE SENT	NEW LINK CONFIRMED

PRINT THIS PAGE

The wall version: five gates

One stage at a time. Tick the gate before you start the next stage.

01	**Pre-migration audit**	The notice date and the data-ownership clause are both in writing.	☐
02	**Export**	Every file opens, has a header row, and is not empty — checked the day it arrives.	☐
03	**Import and reconcile**	Counts agree and 20 fares match to the penny. If they do not, stop.	☐
04	**Dual-running window**	Three consecutive days where the two systems agree on allocation and price, with no unexplained gaps.	☐
05	**Cutover and decommission**	Third clean consecutive day reached before decommissioning — two good days can be luck.	☐

See a dual-running window on a live console

A 30-minute walkthrough with your zones and your fares.

taxidex.com/book-demo