Switching Your DMS Without Losing Data, Deals, or a Single Day of Business

A straight-answer FAQ for independent dealers who've thought about switching their DMS, but never wanted to deal with what they assumed would happen next.

1. Do I lose my historical deal and customer data?

Not if the migration is done right, but this is the question worth asking any vendor before you sign anything. Deal history, customer records, and inventory data typically live in one of a few formats — CSV export, a direct database dump, or an API — and a real migration plan should tell you upfront which one your current DMS supports and how it's getting moved.

What actually gets carried over usually breaks down like this:

- **Customer and contact records** — almost always fully portable, since this data is the least proprietary.
- **Closed deal history** — portable in most cases, though older deals on legacy systems sometimes only export as a flat report rather than structured data. Ask to see a sample export before you commit.
- **Open deals in progress** — the trickiest part of any cutover. Ask specifically how open deals are handled during the transition window, not just closed history.
- **Inventory records** — generally the easiest to move, since VIN-based data is standardized across the industry.

> **What to ask a vendor:** "Can you show me a completed data migration from my current DMS, and can I see what it looked like before and after?" If they can't show you a real example, that's the answer.

2. How long is my dealership actually down during the switch?

"Downtime" is usually the wrong way to think about it — the better question is how many days your team is running two systems at once, or entering deals by hand while the new system gets configured.

A realistic cutover for an independent dealership generally runs in three phases:

- **Setup and data migration** (typically a few days to two weeks, depending on how much historical data is being moved) — done in parallel with your existing system, so this shouldn't touch live operations.
- **Parallel run** (a few days) — your team enters new deals in both systems briefly, just to confirm the new one is producing the same numbers before you rely on it.
- **Cutover** — a single day where you flip over. If it's planned well, this should not be a day where you stop selling cars.

> **What to ask a vendor:** "Walk me through the exact week of my cutover, day by day." A vendor who's done this before should be able to answer that without hesitating.

3. Am I locked into a contract if it doesn't work out?

This is the single biggest reason dealers stay on a system they don't like — nobody wants to sign a multi-year agreement and find out six months in that support is slow or a feature they were promised never showed up.

A few things worth checking in writing before you switch anything, regardless of who you're switching to:

- Is there a minimum term, or can you leave month to month?
- Is there a fee to export your data back out if you ever leave?
- Are setup or "onboarding" fees refundable if you cancel early?
- Does support response time show up anywhere in writing, or is it just a verbal promise?

F&I Central's model is $0 platform cost with no contract, specifically because independent dealers told us contract lock-in was the reason they stayed on systems they didn't like. That's not universal across the industry — plenty of DMS providers require multi-year agreements — so it's worth confirming directly with whoever you're evaluating.

4. Do my sales and F&I staff need to be retrained from scratch?

Some of this, yes — any new interface takes a few days to get comfortable with. But the parts of the job that actually take training aren't usually the software, they're the workflow: how a deal moves from desk to F&I to finance to delivery. If the new system is built around a similar workflow to what your team already does, the learning curve is mostly "where did this button move," not "how does this job work now."

What tends to carry over with little to no retraining:

- Credit application and credit bureau workflows, if the new system integrates with the same bureaus
- Lender submission process, if your LOS relationships (CUDL, DealerTrack, R1, etc.) are already supported
- Menu selling and F&I product presentation, since the underlying products and math don't change

What genuinely takes learning: any new reporting layout, new keyboard shortcuts or navigation, and whatever's different about how the new system handles state-specific paperwork.

5. What's the real cost of switching, beyond the software price?

The line item dealers actually see is the monthly or per-deal software fee. The line items that catch people off guard tend to be these:

Cost dealers often forget to ask about	Why it matters
Data migration / setup fees	Some vendors charge separately for moving your historical data over.
Per-user or per-seat pricing	A quoted price can look low until you add every salesperson and F&I manager.
Integration fees for DMV, credit bureaus, or lenders	Some platforms charge extra to connect the tools you already use.
Cancellation or data-export fees	What it costs to leave later is as important as what it costs to join.
Staff time during cutover	Even a smooth migration takes hours of your team's attention that week.

F&I Central's platform itself is $0 cost, with revenue instead coming from the vendor network dealers already work with — warranty, GAP, and ancillary product providers — rather than a software subscription. Worth asking any vendor you're evaluating to walk through their full pricing structure, not just the headline number.

F&I Central has helped over 3,500 independent dealers switch DMS platforms since 1986 — $0 platform cost, no contract, and a migration team that's done this before.

Talk to Us About Your Switch

This FAQ is general guidance based on common industry practices for dealership DMS transitions and is not a guarantee of any specific vendor's process, pricing, or timeline, including F&I Central's. Always confirm migration scope, contract terms, and total cost directly with any vendor in writing before switching.