**New Managed Cloud Services Client Checklist**

New Client / Signer: Date:

Signed Deal (circle one) **Silver - Gold - Platinum**

First Month on Service will be: Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

**Cover Sheet**

# of Servers: Cost for Servers:

# of Workstations: Cost for Workstations:

Cloud 5-packs Cost for Cloud 5-packs

Cloud 5-pack MS Cloud 5-pack MS

Other Cost Other

Other Cost Other

Total Monthly:

Setup Fees:

Setup to be paid by (circle one) Check Credit Card

Monthly to be paid by (circle one) Check Credit Card

(3 months) each month

Correct Billing Information:

**Company**

**Name**

**Address 1**

**Address 2**

**City / State / Zip**

**Contact Phone**

**1. Account Setup / Update**

Person Responsible Date Completed

**Sales / Admin:**

Create Service Request (time estimate 1.5 hrs) Admin

Check to see that the names match how they want to be billed for services:

PSA Admin

QuickBooks Admin

Mailing List Admin

Create Invoices for Setup / monthly Admin

Calculate first month fees + setup Sales

Collect Money

If Credit Card:

* Collect Credit Card form Sales
* Charge Credit card: initial setup fees/first month Karl
* Apply payments in QB Karl
* Set up Autopay & Monthly recurring. Karl
* Remove old recurring charges from credit card Karl

If Check:

* Collect check from client (3 months + setup) Sales
* Apply payments in QB Admin
* Hand off check for depositing . . . to . . . Admin

**Admin Dept:**

Identify three people to be listed in our call down

list in the event of a server down. Admin

File all paperwork generated to this point Admin

If existing client, create credits as needed for Email   
Filtering, monitoring, other services. Admin

Expire old service agreements in PSA Admin

Create new service agreements in PSA Admin

Set the new service agreements in PSA

to be the default agreement Admin

(In the Company \ Agreement Maintenance window)

Change Ticket to “Schedule This" Admin

**2. Setup Monitoring and Patch Management**

**Tech Dept:**

Update Managed Services Grid Tech

Install RMM agent on server (create Ticket) Tech

[MAXFocus] Set network detect to inventory all   
attached devices. Determine which of these need  
agents and deploy agents. Tech

Add server to RMM daily monitoring and verify Tech

Add server to RMM patch management and verify Tech

Set up back up jobs and document narrative Tech

Update daily monitoring sheet to include new   
client requirements Tech

If new client, create the monthly maintenance checklist Tech

If existing client, check existing Monthly Maintenance

checklist for compliance. Tech

Verify that RMM Agent and AV are working on all Tech

Update Ticket to show we have completed these steps Tech

**Customer Service Dept:**

Train Client on . . .

* PSA portal Cust Serv
* Ticketing process Cust Serv

Send intro letter to client Cust Serv

**3. Setup Web, Email, Other Services**

Person Responsible Date Completed

**Tech Department**

(If client requires Web Site)

* Take Control of DNS or communicate with   
  whoever manages it Tech
* Set up Hosting Service Tech
* Copy files if flat web site  
  or
* Set up WordPress and forward credentials Tech

Document all aspects of web hosting service

**Storage**

Set up Jungle Disk per separate checklist Tech

This client requires the following storage spaces:

* Company-Wide Folders
* Admin/Financial/Personnel Folders
* Other Folders

Storage setup with be:

1. Primary Storage in Cloud / Backed up to
2. Primary Storage Locak / Becked up to Cloud
3. Other (describe):

**Email and Office**

Email and Office apps provided through:

(e.g., Intermedia / Rackspace / Appriver)

Obtain list of all users and emails required for each Tech

(Note: Get this in written format and copy/paste.

Do not re-type this information.)

Create email accounts and per separate checklist Tech

Set up Email Filtering, if appropriate Tech

Migrate email per separate checklist Tech

For each user, determine whether Office Apps are needed

Document apps needed per user Tech

Include:

* MS Office Pro
* MS Office Pro Plus (Access)
* Skype
* Email Archiving
* Email OWA
* Email Encryption

Allocate Office licenses per user Tech

Install Office licenses per user Tech

If client is using Sharepoint, create a project for this Tech

**Customer Service Dept:**

Train Client on . . .

* Email (Spam) Filtering Cust Serv
* Office License username/pw Cust Serv
* Email Archiving Cust Serv
* OWA Cust Serv
* Email Encryption Cust Serv

**Last Action:**

**When all complete, put this form in filing in-box**