**Outline – New Managed Services Client Checklist**

New Client / Signer: Date:

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

First Month on Service will be:

**Cover Sheet**

# of Servers: Cost for Servers:

# of Workstations: Cost for Workstations:

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**

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:

ConnectWise 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:**

File all paperwork Admin

Create credits as needed for Exchange Defender,  
 monitoring, other. Admin

Expire old service agreements in ConnectWise Admin

Create service agreements in ConnectWise Admin

Create Kaseya Executive Summary Report Admin

Change SR to “Schedule This" Admin

**Tech Dept:**

Update Managed Services Grid Tech

Set up Monitoring, Schedule Patches, Fixes Tech

Set up Exchange Defender, if appropriate Tech

Train Client on Exchange Defender Tech

Install Kaseya agent on client PCs (create SR) Tech

Install Zenith agent on server (create SR) Tech

Set LAN watch to run initially on server and then  
 scheduled daily after that Tech

Add server to Kaseya daily monitoring (or verify) Tech

Add server to Kaseya patch mangmnt group (or verify) Tech

Set up back up jobs to email to KPE monitor (or verify) Tech

Update daily monitoring sheet to include new   
client requirements Tech

Verify alerts set for “agent status” & “low disc” Tech

**Customer Service Dept:**

Tutor client contact re: ConnectWise portal Cust Serv

Tutor client contact re: KPE SR process Cust Serv

Send intro letter to client Cust Serv

**Last Action:**

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