MSP Client Onboarding Form

Use this form to get the information you need from your new client to onboard them properly

Contact Information		Comments
Client company name		
Client company address		
Client representative name		
Client representative telephone number		
Client representative email address		

Services		Comments
Service tier		
Managed services required	Help desk	
	Managed backup	
	Cloud storage	
	Hardware procurement	
	Security services	
	Microsoft 365/Google G Suite management	
	Other	

Network Details

Network	
LAN subnet	
Number of workstations	
Number of users	
Number of printers	
Number of phones	
Domain?	Y/N
If yes, domain name	domainexample.com
Router info	
Firewall?	Y/N
Router model	
LAN IP	
WAN IP	
Username	
Password	

Firewall info

Model	
LAN IP	
Support?	Y/N
Username	
Password	
Expiration date	

Switch(es) - Core switches

Make/Model	
IP address	
Username	
Password	
Make/Model	
IP address	
Username	
Password	
Make/Model	
IP address	
Username	
Password	

Wireless

SSID	
Key	
LAN controller?	Y/N
If yes, what?	
Number of APs	
Guest?	Y/N
IP address	
Username	
Password	

Servers

Make/Model	
Purpose	
IP address	
Username	
Password	
Name	

Virtualized?	Y/N
Disk size	
RAID level	
Warranty?	Y/N
If yes, dates	
Make/Model	
Purpose	
IP address	
Username	
Password	
Name	
Virtualized?	Y/N
Disk size	
RAID level	
Warranty?	Y/N
If yes, dates	
Make/Model	
Purpose	
IP address	
Username	
Password	
Name	
Virtualized?	Y/N
Disk size	
RAID level	
Warranty?	Y/N
If yes, dates	

Workstations

User	
Type	
Antivirus	
User	
Type	
Antivirus	
User	
Type	
Antivirus	

User	
Type	
Antivirus	
User	
Type	
Antivirus	
User	
Type	
Antivirus	

Applications - Proprietary software

Software	
Purpose	
License key	
Support contact details	
Software	
Purpose	
License key	
Support contact details	
Software	
Purpose	
License key	
Support contact details	

Domains and hosting

Domain	
Username	
Password	
Domain	
Username	
Password	
Hosting	
Username	
Password	

Email - Administrator account

Hosting	
Username	
Password	
Number of emails	

Existing Client Documentation

Type of documentation	Description	Link to the file	Comments

Business-Specific Details

Number of locations	
Location 1 address	
Location 1 telephone number	
Location 1 working hours	
Location 1 manager	
Location 2 address	
Location 2 telephone number	
Location 2 working hours	
Location 2 manager	

Other information	Comments

Who to Contact During Emergency Responses

Work hours	
Name	
Telephone number	
Address	
Office address	
Comments	

Out of hours	
Name	
Telephone number	
Address	
Office address	
Comments	

Notes