Setup handover checklist

Project document preview. Complete the agreed scope, responsibilities, fees and acceptance terms for your project before work begins. This is not an accepted quotation.

1. Identify the agreed setup

Client / system: _____ Project owner: _____ Scope: _____ Quotation version: _____ Handover date: _____

2. Check access and selected modules

Confirm client/admin access, user roles and agreed system features. Identify the hosting/provider account owner, supplied files, licences and agreed usage/source-code rights. Record any access issue and its owner.

3. Walk through the core workflow

Create an authorised test customer and linked quotation. Test jobs and manual payment records if included. Verify totals and CSV export. Record acceptance evidence and unresolved issues.

4. Complete onboarding

Walk through everyday tasks with the workspace owner. Provide the quick-start guide. Record session format, session count, attendance and remaining questions.

5. Record care and exit terms

Complete support contact, support hours and response targets, backup/recovery responsibilities, hosting charges, optional maintenance, change requests, cancellation, data export and retention terms before acceptance.

6. Agree the next action

Open item: _____ Owner: _____ Due date: _____ Customer acceptance: _____ Setup owner: _____