Onboarding new customer checklist

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DONE	ACTION	DESCRIPTION	LINK IN THE WEB CONSOLE	LINK TO HELP
	Add a backup destination	We recommend using an individual bucket/container for each company	**Backup -> Storage Accounts** IN THE TOP MENU	Link to help
	Create a company	Add the name of the customer, add the backup destination	**Organization -> Companies**	Link to help
	Install the backup agent	Download **Backup for Windows** for all licenses except for VM edition	**Downloads** section from the top menu	Link to help
	Assign a user to the newly installed agent	On the Computers page, find the new machine and click on '**Authorize computer**' or '**Pending**'. Select the company from the drop-down menu	**Computers** TAB IN THE TOP MENU WITH THE 'PENDING' FILTER	Link to help
	Create backup plan	It's recommended to start with a file backup plan. Follow the simple wizard.	**Computers** TAB IN THE TOP MENU	Link to help
	Configure reporting	Status reports can be configured in the backup plan. Here you can create a group report	**Reporting -> Scheduled Reports**	Link to help

For mass agent deployment, MSP360 has developed the '**Discover and Deploy**' tool, which scans for computers inside a domain or network. Once the list of computers is discovered, you can select which computer you want to install the Backup, RMM, and Connect agents. **More information can be found here**.

For mass backup plan deployment, MSP360 offers a '**Backup Templates**' feature, allowing you to create the backup job and then apply it to your endpoints with flexible filters. **More information about this feature can be found here**.

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