TLC Customer Checklist

Preparation prior to appointment:
☐ Confirm hardware selection.
☐ Confirm appointment time and location.
☐ Send a confirmation email to the customer the day before.
☐ Confirm surplus responsibility.
☐ Pull the equipment.
☐ Log the equipment into the CMDB.

Deskside with Customer:
☐ Confirm with the customer that all their data from their old computer has been transferred.
☐ Confirm with the customer what equipment is being removed.
☐ Set up new equipment.
☐ Confirm with the customer that the equipment and monitor displays are properly placed.
☐ Boot up new device and have customer log in.
☐ Confirm that WS1 and the HUB are on the device.
☐ Confirm the customer can connect to both UAWifi and Edurom.
☐ Confirm the customer can connect to VPN.
☐ Confirm the customer can elevate using Admin by Request.
☐ Provide examples to customers of when they would use it.

Install the following applications:
☐ Install Outlook
☐ Confirm that the customer can access folders.
☐ Confirm that the customer can access their calendar.
☐ Confirm that the customer can access shared calendars.
☐ Send a test email.
☐ Install Teams
☐ Explain the difference between the two versions of Teams on the start menu.
☐ Confirm that the customer can access all their Teams channels.
☐ Confirm that the customer can access SharePoint.
☐ Sent a test message.
☐ Install Office Suite
☐ Confirm that the customer can access Word.
☐ Confirm that the customer can access Excel.
☐ Confirm that the customer can access PowerPoint.

Confirm if needed:
☐ Confirm if the customer needs MS Project or Visio
☐ Help customer submit form in the Service Catalog to request license.
☐ Confirm the customer can access Project.
☐ Confirm the customer can access Visio.
☐ Install Zoom
☐ Confirm that the customer can access Zoom.
☐ Confirm that the customer can schedule a meeting in Zoom.
☐ Confirm that the customer can access Zoom phone.
☐ Start a test Zoom.
☐ Confirm microphone works.
☐ Confirm the camera works.
☐ Install Adobe
☐ Confirm that the customer can access Acrobat.
☐ Confirm that the customer can access other needed Adobe software.
☐ Browser
☐ Confirm that the customer can access their browser of choice.
☐ Confirm that the customer can access their bookmarks.
☐ Confirm that the customer browser settings are correct.
☐ Sophos
☐ Confirm that the customer can access Sophos.
☐ Confirm Sophos is active and scanning.
☐ WorkspaceONE Intelligent Hub.
☐ Confirm that the customer can access the application catalog.
☐ Confirm the customer knows how to download the software from the application catalog.
☐ Confirm the customer can access the support tab.
☐ Review how to contact support using WorkspaceONE.
☐ Confirm WorkspaceONE assist is working.
☐ Box Drive
☐ Confirm that the customer can access Box Drive.
☐ Confirm that the customer can access their Box folders.
☐ Other
☐ Confirm that the customer can access any additional application they may need.
☐ Confirm additional applications are in working order.
☐ Printing
☐ Confirm that the customer can access and connect to their printer.
☐ Print a test page.
☐ Transfer Data from the previous device.
☐ Confirm that the customer can access their transferred data.
☐ Confirm the customer has all their data.
☐ Check for additional Windows updates.
☐ Recap what was done with the customer and confirm completion.

**End of Interaction**
☐ Collect all boxes.
☐ Collect all additional cables.
☐ Remove old hardware for surplus.
☐ Remove any trash.

**Upon return to office:**
☐ Dispose of boxes.
☐ Place extra cables in the corresponding bin.
☐ Bring old equipment into the surplus staging room.
☐ Update the CMDB to reflect surplused equipment.
☐ Note and close the ticket.
☐ Send a follow-up email.