

IT handover for tradies

Record business account ownership, job file access and device handover, then agree who will follow up the gaps.

Business or team

Date checked

Checked by

Handover to

Email, domain and quoting

Confirm business ownership and approved access. Use a harmless sample to check the quote and invoice handover.

Account owner

Recovery verified

☐ Yes ☐ No ☐ Not needed

Evidence checked

Next action

Current job files

Check the shared location and who can update it. Use an empty test file and record the result without job or customer details.

Account owner

Recovery verified

☐ Yes ☐ No ☐ Not needed

Evidence checked

Next action

Phone and laptop handover

Confirm the device owner, approved access and recovery contact. Agree which access should stay or be removed before changes.

Account owner

Recovery verified

☐ Yes ☐ No ☐ Not needed

Evidence checked

Next action

Keep passwords, recovery codes, payment data and customer records out of this worksheet. Record safe evidence notes and references only.

Dependencies and follow up

Agree the handover owner and the next check. A gap belongs in the action log until someone has verified it.

Systems that depend on each other

Confirm the dependency and the owner. Agree access changes before making them.

Workflow	Dependencies to check	Account owner
Quote to invoice	Business email, quoting app, accounting app and approval owner	
Job files on site	Shared storage, device access, connectivity and file owner	
Staff handover	Business accounts, assigned devices and approved access changes	

Suppliers and escalation

Use the approved support route and fallback. Record who can authorise a change.

System or supplier	Contact route	Escalation or fallback

Action log

Next action	Owner or approver	Check again