Backup storage for agencies: planning checklist

Organize client backup copies with clear access and restore responsibilities. Plan how each client receives their data if the relationship ends.

What to check

What the service needs to cover

Check agency backup storage where multiple client datasets need explicit ownership, separation, retention, access control, handoff, and a separate recovery plan for each client.

Ownership and access

Record the account owner, administrator and recovery contact. Keep passwords and keys in an appropriate secret store, not in this worksheet.

Recovery and retention

For backups, define the data-loss window and retention period. Check physical and account separation from the source, then restore a sample before relying on the copy.

Changes and renewals

Keep current configuration and renewal details. Review the plan when the data, software or people responsible for the service change.

Before you proceed

Confirm the current product specifications and service responsibilities. Record who can approve a change and how to recover the service if it goes wrong.

Services to compare

Check the linked product pages for current prices, included resources, availability and terms.

Backup storage

Canadian SFTP storage for compatible backup software. You configure backup jobs and retention. Confirm physical separation when protecting another DotMoose service.

Ask about your project

Send the software, capacity, location and timing requirements. Confirm any feature not shown on the current product page before ordering.

Domains

Register, transfer or renew a domain and manage DNS. Check extension-specific eligibility, transfer rules and renewal prices.

Your project notes

Keep this page with your project. Do not write passwords, private keys or other secrets here.

Project / website	
Software and data	
Service / full ongoing cost	
Account owner / administrator	
Backup location / restore test	
Move or launch date / rollback plan	

Software and data: Which application, files, databases and integrations are included?

People and timing: Who owns the service, who maintains it, and when must the work be finished?

Budget and recovery: What is the full ongoing cost, and how will you recover if the change fails?

Ready for the next step?
See backup storage
Ask about your project
View this guide on dotmoose.com