Canadian hosting for accounting firms: planning checklist

Host your accounting practice's public website in Canada. Keep client documents and financial records in separately secured systems.

What to check

Website and applications

List the pages, forms, email accounts and applications included in the project. Note what will stay with another provider.

Software and resource needs

Check public practice information, staff editing access, enquiry forms and separately secured client portals.

Account access and renewals

Record who owns the domain and hosting account, pays renewals and approves changes. Use individual logins where supported, and keep recovery access available to the owner.

Backup and handover

List the files, databases and mailboxes that need a backup. Agree who checks restores and who hands over access when a staff member or supplier leaves.

Before you proceed

Keep confidential client documents, financial records and portals separately secured. Hosting the public website in Canada does not establish regulatory compliance.

Services to compare

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

Web hosting

Shared hosting for websites and email, with Virtualmin included. Check the current plan limits and optional software charges.

Migration help

Get help planning a supported move. Agree on scope, tests, cutover timing and rollback before switching live traffic.

Domains

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

Ask about your project

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

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 web hosting
Ask about your project
View this guide on dotmoose.com