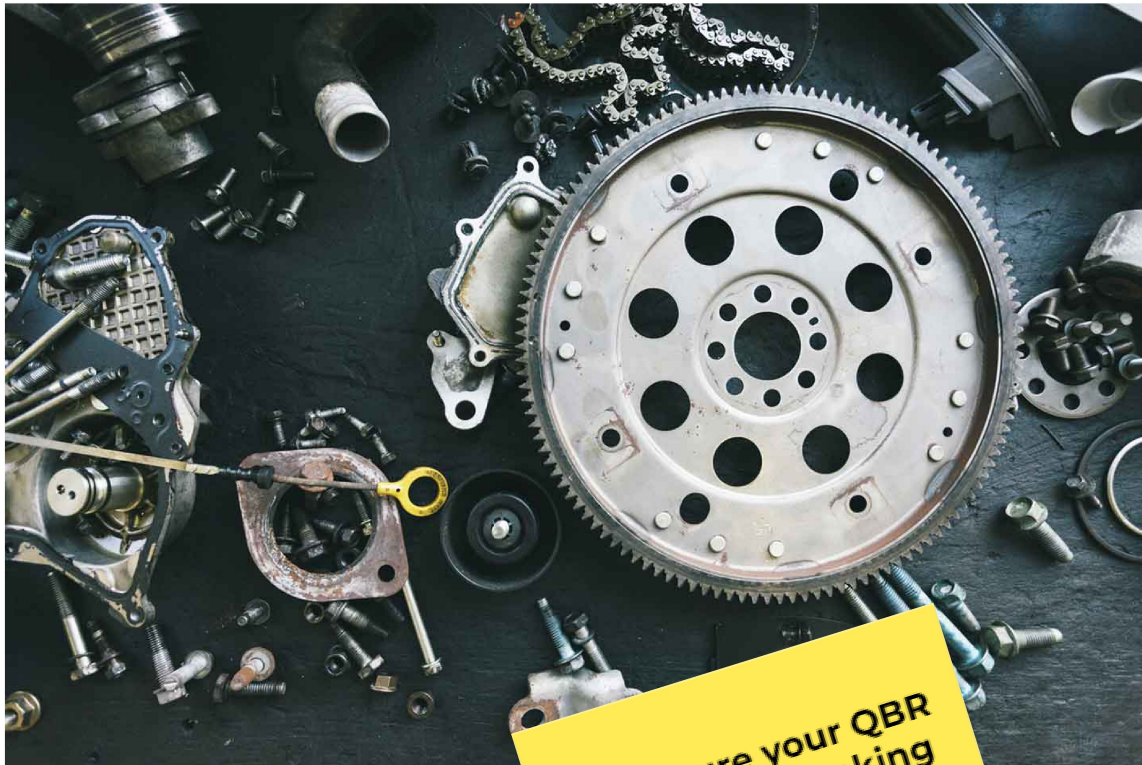


Creative designs

Q2 Business Review

April 2021



Participants

Chris DiLaura, Creative Designs

Alex Farling, Lifecycle Insights

**Make sure your QBR
is a forward looking
presentation -
Clients generally
care more about
strategy than
rehashing the past.**

Meeting Agenda

Strategic Business Review Agenda

Check in: (5 min - vCIO)

Executive Summary: (5 min)

Relevant Action Items:(5 min) Carry-over Action Items from last SBR (if any)

- 🕒 *Wireless network is causing performance issues - see project recommendations*

Recent Project Status Update: (5 min)

- 🕒 M365 MFA - 90% Deployed and on target.
- 🕒 Security Awareness Training - Completely deployed & in use.

Client Updates & Changes: (15 min)

- 🕒 Discussion: Client has planned expansion in early 2022 through acquisition of a competitor.
- 🕒 Discussion: 2008 Server still required by LoB application - how can we keep it secure until replacement?

Risk & Exposure Review:(45 min)

- 🕒 Risk Assessment Review.
- 🕒 Budget & Lifecycle Replacement Review.
- 🕒 Remediation Recommendations.
- 🕒 Executive Summary Presentation
- 🕒 Supporting Documentation Review (If Necessary)

Issues list: Identify, Discuss, Solve (30 min)

- 🕒
- 🕒

Wrap up: (5 min)

- 🕒 Schedule next QBR
- 🕒 Document new action items (to become tickets)
 - 🕒 MSP Action Items:
 - 🕒
 - 🕒
 - 🕒 Client To-Do's:
 - 🕒

Always send an agenda in advance to make your client aware of the value of the meeting content and to encourage them to bring their priorities to the table!

Assessment Summary

SUMMARY

The overall summary report provides an overall score for each of the categories designed to show the overall health and compliance of your IT systems. Scores are weighted based on their respective importance to keeping your business in optimal range.

Summary Report for: Creative Designs

Date Prepared: 2021-01-12

Assessment Template: Lifecycle DFLT Assessment

Category	Description	Score
Hardware	Review different components related to client's infrastructure.	8
Business Applications / Software	Software Applications for Operating and Protecting the Business	88
Policy & Procedure	Does the company have the necessary Policies & Procedures in place to provide appropriate protections?	62
Security	Review critical areas of security in place for the client.	42
Continuity	Business Continuity and BDR	83
Regulatory Compliance	Identify and Score Client Compliance Obligations	75
Overall Score		58

The Risk Assessment sets the stage - this is the status quo. If your client changes nothing, these risks will go unmitigated.

CATEGORIES

Category: Hardware

Review different components related to client's infrastructure.

Item	Summary	Score
Asset Inventory	Asset Inventory is not being performed.	At Risk
Internet Security Appliance	Current device is a router only and lacks monitoring and up to date security features.	At Risk
Power Management	Existing UPS is at EOL and / or does not have enough capacity to support the environment.	At Risk
Servers	Some servers are past EOL or have warranty that has expired.	At Risk
Switching	Switches are over 5 years old and not cloud managed/monitored. This will have performance implications and increases potential for failure and increased downtime.	At Risk
Workstations	One Workstation is 5.1 years old.	Acceptable Risk

Hardware Score	8
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Category: Business Applications / Software

Software Applications for Operating and Protecting the Business

Item	Summary	Score
Hosted Email	Email is hosted through Microsoft Office 365.	Satisfactory
Email Encryption	Email encryption is included as part of the Office 365 plan.	Satisfactory
Backup and Disaster Recovery	BDR appliance is backing up server/s on a regular, automated basis with offsite, encrypted replication.	Satisfactory
Operating System	Some Operating Systems are no longer vendor supported, which creates a security risk to the company and places the company out of major industry best practices and compliances.	At Risk
Business Applications / Software Score		88

Category: Policy & Procedure

Does the company have the necessary Policies & Procedures in place to provide appropriate protections?

Item	Summary	Score
Acceptable Use Policy (AUP)	Policy exists but has not been shared with IT.	Needs Attention
Access Logging	Policy exists but has not been shared with IT.	Needs Attention
Off Boarding Policy	Policy exists but has not been shared with IT.	Needs Attention
Controlled Access	Policy exists but has not been shared with IT.	Needs Attention
Data Encryption Policy	Policy exists but has not been shared with IT.	Needs Attention
Lifecycle Management	Lifecycle Management is being performed regularly, limiting technology debt and decreasing risk for the organization.	Satisfactory
LoB Application Support	Policy exists but has not been shared with IT.	Needs Attention
Mobile Device Policy	Mobile Device Policy exists but does not account for personal devices, leaving the client at risk for exposure.	At Risk
Patch Management	No defined process exists for deploying Operating System and Application updates on a regular basis. These patches are installed manually and there is no method or process for checking the status of	At Risk
Removable Media Policy	Removable Media Policy is in place, signed by all staff members, and enforced with a software solution.	Satisfactory
Security Audit	Regular Security Audits are being performed to ensure that stale user accounts are removed/deactivated and that users have the least level of privilege to perform their job functions.	Satisfactory
Technology Budgeting	Technology Budgeting is being performed regularly as part of the VCIO process, limiting technology debt and making the lifecycle management process easier to manage.	Satisfactory
VCIO Consulting Services	VCIO Services are included in the service offering and Strategic Business Review meetings are scheduled quarterly.	Satisfactory

Item	Summary	Score
Policy & Procedure Score		62

Category: Security

Review critical areas of security in place for the client.

Item	Summary	Score
Anti-Spam and Virus Filter	There is a 3rd party anti-spam and virus filter that is integrated with the hosted Exchange provider.	Needs Attention
Anti-Virus	Quality anti-virus is installed and centrally managed.	Satisfactory
Directory Services	Users, Groups, Permissions, and Security Policies are managed on outdated versions of Windows.	Needs Attention
Intrusion Detection & Prevention	IPS/IDS is not supported on current firewall solution.	At Risk
VPN / Remote Access	VPN is required to work remotely but is not protected by MFA	At Risk
Virtual Networks (VLANs)	A minimal number of VLANs have been deployed with access rules between them to provide an additional security layer but further segmentation is recommended to achieve best practices compliance.	Needs Attention

Security Score	42
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Category: Continuity

Business Continuity and BDR

Item	Summary	Score
Backup of Cloud Services	Cloud Backups have been deployed. Monitoring and test restores are part of the Client's service plan.	Satisfactory
Email Archiving	Email Archiving is in place to protect sensitive data from loss and/or simplify reporting in the event of a data request (i.e. FOIA).	Satisfactory
Redundant Internet	Client is aware that redundant solutions exist, but has identified minimal downtime as an acceptable risk that has minimal impact on the business.	Acceptable Risk

Continuity Score	83
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Category: Regulatory Compliance

Identify and Score Client Compliance Obligations

Item	Summary	Score
HIPAA Regulatory Compliance	Client does not operate as a Covered Entity or Business Associate.	Not Applicable
NIST 800-171 Compliance	Client has performed a full Risk Assessment but has work to do to achieve alignment with NIST 800-171	Needs Attention
PCI Compliance	Client regularly completes their PCI compliance questionnaire with input from the IT team and is following the compliance recommendations of their processor or PCI Compliance Consultant..	Satisfactory

Regulatory Compliance Score	75
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At Risk Items:

Item	Summary	Comments
Asset Inventory	Asset Inventory is not being performed.	Inventory is not being performed by the current MSP. The client does not have a complete picture of their environment, so the s which they are unaware of. y may have vulnerabilities which they are unaware of.
Internet Security Appliance	Current device is a router only and lacks monitoring and up to date security features.	Here's my resolution plan for this - do a project
Power Management	Existing UPS is at EOL and / or does not have enough capacity to support the environment.	Recommendation: Replace Battery Backup in server closet
Servers	Some servers are past EOL or have warranty that has expired.	Recommendation - Server upgrade project to get all critical infrastructure under manufacturer's warranty - this helps reduce downtime in the event of a failure.
Switching	Switches are over 5 years old and not cloud managed/monitored. This will have performance implications and increases potential for failure and increased downtime.	Recommendation - Network upgrade project to get all critical infrastructure under manufacturer's warranty - this helps reduce downtime in the event of a failure.
Operating System	Some Operating Systems are no longer vendor supported, which creates a security risk to the company and places the company out of major industry best practices and compliances.	Recommendation - Upgrade Operating Systems as part of the Power Management plan
Mobile Device Policy	Mobile Device Policy exists but does not account for personal devices, leaving the client at risk for exposure.	Recommendation - Update Mobile Device Policy that includes personal devices.

The Item Detail section of the QBR displays all of the public comments you entered while filling out the assessment. These become your action plan for the foreseeable future.

Item	Summary	Comments
Patch Management	No defined process exists for deploying Operating System and Application updates on a regular basis. These patches are installed manually and there is no method or process for checking the status of	
Intrusion Detection & Prevention	IPS/IDS is not supported on current firewall solution.	Recommend upgrading firewalls to a more modern and properly configured solution.
VPN / Remote Access	VPN is required to work remotely but is not protected by MFA	Recommend upgrading remote access to an MFA solution.

Needs Attention Items:

Item	Summary	Comments
Acceptable Use Policy (AUP)	Policy exists but has not been shared with IT.	To-Do Item - Provide IT with a copy of all policies and procedures for reference so that IT may act in accordance with such policies.
Access Logging	Policy exists but has not been shared with IT.	To-Do Item - Provide IT with a copy of all policies and procedures for reference so that IT may act in accordance with such policies.
Off Boarding Policy	Policy exists but has not been shared with IT.	To-Do Item - Provide IT with a copy of all policies and procedures for reference so that IT may act in accordance with such policies.
Controlled Access	Policy exists but has not been shared with IT.	To-Do Item - Provide IT with a copy of all policies and procedures for reference so that IT may act in accordance with such policies.
Data Encryption Policy	Policy exists but has not been shared with IT.	To-Do Item - Provide IT with a copy of all policies and procedures for reference so that IT may act in accordance with such policies.
LoB Application Support	Policy exists but has not been shared with IT.	To-Do Item - Provide IT with a copy of all policies and procedures for reference so that IT may act in accordance with such policies.
Anti-Spam and Virus Filter	There is a 3rd party anti-spam and virus filter that is integrated with the hosted Exchange provider.	For best experience, the client should consider moving to antispam through [MSP Name], as it is better supported by our team.
Directory Services	Users, Groups, Permissions, and Security Policies are managed on outdated versions of Windows.	Recommendation - Upgrade to the latest Operating Systems to get the most secure and powerful management functions.
Virtual Networks (VLANs)	A minimal number of VLANs have been deployed with access rules between them to provide an additional security layer but further	Recommend adding more VLANs to segment IOT devices as a part of the next network

Item	Summary	Comments
	segmentation is recommended to achieve best practices compliance.	infrastructure upgrade.
NIST 800-171 Compliance	Client has performed a full Risk Assessment but has work to do to achieve alignment with NIST 800-171	

Acceptable Risk Items:

Item	Summary	Comments
Workstations	One Workstation is 5.1 years old.	Recommend deferring replacement until Q2 as other projects are more pressing at this time.
Redundant Internet	Client is aware that redundant solutions exist, but has identified minimal downtime as an acceptable risk that has minimal impact on the business.	Client understands the implications of having a single ISP and accepts the risk of minimal downtime.

6 Mo Budget Forecast

Component	Overdue	Not Scheduled	Apr 2022	May 2022	Jun 2022	Jul 2022	Aug 2022	Sep 2022
Server	11,050	0	0	0	0	0	0	0
Virtual Server	25	0	0	0	0	0	0	0
Workstation	9,987	0	0	0	79	0	0	0
Network Equipment	1,698	0	0	0	0	0	0	0
Software	0	0	0	900	0	0	0	0
Router	2,475	0	0	0	0	0	0	0
Contracts/Subscriptions	0	0	5,099	7,427	7,427	7,962	7,427	7,427
Recommendations	0	4,950	0	5,100	5,450	0	0	0
Totals	25,235	4,950	5,099	13,427	12,956	7,962	7,427	7,427

Displaying multiple budgets can let a customer view near term, actionable financial data in conjunction with longer term, strategic financial data.

5 Yr Budget Forecast

Component	Overdue	Not Scheduled	2022	2023	2024	2025	2026
Server	11,050	0	0	0	0	0	0
Virtual Server	25	0	0	0	0	0	0
Workstation	9,987	0	1,179	8,750	0	8,750	15,400
Network Equipment	1,698	0	0	2,800	500	498	2,150
Software	0	0	900	400	0	0	950
Printer	0	0	0	5,000	0	0	0
Router	2,475	0	0	0	0	0	0
Contracts/Subscriptions	0	0	66,785	97,665	97,001	100,526	99,676
Recommendations	0	4,950	10,550	0	0	0	0
Totals	25,235	4,950	79,414	114,615	97,501	109,774	118,176

Displaying the long term budget on a single page, the MSP can point out high expense years well in advance, enabling your customers to say yes when it comes time to buy.

Recommendation

Recommendation Overview

Name:Replace network equipment

Status:Proposed

Location:

Description:Replacement for the following assets: Dell SonicWALL - Warehouse, Cisco WAP561 (POS AP) Cluster Controller, Cisco WAP561 (Service AP), Cisco WAP561 (Annex AP), Cisco SF 200 Switch Login Info, New Dell SonicWALL TZ300 - Jonestown

Dates:2022-06-01 thru 2022-06-01

Priority:Medium

Contacts:Company Contacts

- Green, Michael
- Jonestown, Steve

Recommendations show the Assets and Assessment items that are out of place, helping in one associate replacement costs with the aged assets.

Cost Estimates – Total Estimated Recommendation Cost: 5,450

Costs	2022-Jun
Labor	2,000
Materials	500
Replacement	2,950
Total Cost	5,450

Linked Assets

Month	Replace?	Device Name	Location	Type	Make	Model	Serial Nbr	OS	Purchase Date	Warranty Expiration	End Of Life	Repl Cost	Age
2022-Jun	✓	Dell SonicWall - Warehouse	Warehouse	Network Equipment	SonicWall	TZ300	123987/4560		2015-09-18	2020-09-17	2020-09-17	950	6.5
2022-Jun	✓	Cisco WAP561 (POS AP) Cluster Controller	Warehouse	Network Equipment	Cisco	WAP561-A-K9	DN11952A0VV		2016-05-02	2021-05-14	2021-04-02	500	5.9
2022-Jun	✓	Cisco WAP561 (Service AP)	Warehouse	Network Equipment	Cisco	WAP561-A-K9	DN11952A0W5		2016-05-02	2017-05-02	2021-04-02	1,500	5.9

Linked Assessment Items

Score	Item	Response	Type	Template	Category	Date
At Risk	Internet Security Appliance	Current device is a router only and lacks monitoring and up to date security features.	Comparison	Lifecycle DFLT Assessment	Hardware	2021-01-12
At Risk	Intrusion Detection &	IPS/IDS is not supported on current	Comparison	Lifecycle DFLT	Security	2021-01-12

Score	Item	Response	Type	Template	Category	Date
	Prevention	firewall solution.		Assessment		
At Risk	VPN / Remote Access	VPN is required to work remotely but is not protected by MFA	Comparison	Lifecycle DFLT Assessment	Security	2021-01-12
Needs Attention	Virtual Networks (VLANs)	A minimal number of VLANs have been deployed with access rules between them to provide an additional security layer but further segmentation is recommended to achieve best practices compliance.	Comparison	Lifecycle DFLT Assessment	Security	2021-01-12

Recommendation

Recommendation Overview

Name:	Windows 7 PC replacement
Status:	Deferred
Location:	
Description:	Replacement for the following assets: Dell SonicWall Jonestown, DESKTOP- 1TJ8GLQ,G8HTDB2,NL426337,D8XRHX1

Dates:	
Priority:	Medium
Contacts:	Company ContactsInternal Contacts

Cost Estimates – Total Estimated Recommendation Cost: 8,462

Costs	
Labor	
Materials	
Replacement	8,462
Total Cost	8,462

Linked Assets

Month	Replace?	Device Name	Location	Type	Make	Model	Serial Nbr	OS	Purchase Date	Warranty Expiration	End Of Life	Repl Cost	Age
No Date	✓	Jump-Box-PC	Ocean View Store	Workstation	Dell	OptiPlex 755	F9SW3H1	Microsoft Windows 7 Professional x64	2008-08-11	2011-08-12	2020-04-27	1,501	13.7
No Date	✓	BXCKHX1	Lewes Store	Workstation	Dell	OptiPlex 7010	BXCKHX1	Windows 7 Professional	2013-08-13	2016-08-13	2020-08-13	1,900	8.6
No Date	✓	D8YSHX1	Lewes Store	Workstation	Dell	OptiPlex 7010	D8YSHX1	Microsoft Windows 7 Professional x64	2013-11-20	2016-11-21	2020-11-20	1,111	8.4
No Date	✓	D8XRHX1	Warehouse	Workstation	Dell	OptiPlex 7010	D8XRHX1	Microsoft Windows 7 Professional x64	2013-11-20	2016-11-21	2020-11-20	2,200	8.4
No Date	✓	NL426337	Lewes Store	Workstation	Seneca	pro212512	426337	Microsoft Windows 7 Professional			2020-12-31	1,750	

Linked Assessment Items

Score	Item	Response	Type	Template	Category	Date
At Risk	Workstations	Some workstations are past EOL or	Baseline	Lifecycle DFLT	Hardware	2020-03-26

Score	Item	Response	Type	Template	Category	Date
		have warranty that has expired.		Assessment		
At Risk	Operating System	Some Operating Systems are no longer vendor supported, which creates a security risk to the company and places the company out of major industry best practices and compliances.	Baseline	Lifecycle DFLT Assessment	Business Applications / Software	2020-03-26

Recommendation Roadmap

Recommendations Roadmap

Recommendation	Description	Status	Priority	Q1	Q2	Q3	Q4	Total
2022								
Migrate Primary DC to Azure		Option 2	Medium	2,900	11,750	1,200	1,200	17,050
				2,900	1,200	1,200	1,200	6,500
Replace network equipment	Replacement for the following assets: Dell SonicWALL - Warehouse, Cisco WAP561 (POS AP) Cluster Controller, Cisco WAP561 (Service AP), Cisco WAP561 (Annex AP), Cisco SF 200 Switch Login Info, New Dell SonicWALL TZ300 - Jonestown	Proposed	Medium	0	5,450	0	0	5,450
Network Upgrades	Better words here	Planned	Medium	0	5,100	0	0	5,100
2023								
Migrate Primary DC to Azure		Option 2	Medium	1,200	1,200	1,200	1,200	4,800
				1,200	1,200	1,200	1,200	4,800
Not Scheduled				0	0	0	0	22,912
Fully Replace Primary DC	Replacement for the following assets: SecondaryDC01	Option 1	Medium	0	0	0	0	9,500
Antispam, Antivirus, Intrusion prevention detection recommendation	Recommendation to address: Anti-Spam and Virus Filter (At Risk), Anti-Virus (At Risk), Intrusion Detection & Prevention (At Risk)	Proposed	Medium	0	0	0	0	4,950
Windows 7 PC replacement	Replacement for the following assets: Dell SonicWall Jonestown, DESKTOP-1TJ8GLQ,G8HTDB2,NL426337,D8XRHX1	Deferred	Medium	0	0	0	0	8,462

Long term recommendation roadmaps show planned, proposed, and already in progress work as you guide your customer through a multi-year improvement plan.

Executive Summary

Strategic Business Review - Executive Summary

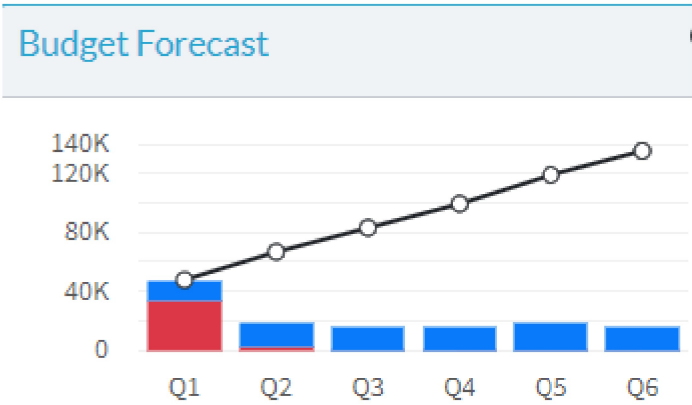
The purpose of this meeting is to address risk and exposure within the organization while simultaneously aligning the activities of your managed IT service provider with the business goals of your organization. Alignment between IT and other business units enables the organization to achieve the best ROI on technology purchases while ensuring that the investment is furthering the goals of other business units.

Scorecard:

Current FY IT Spend Remaining: \$34,013

Next FY IT Budget Estimate: \$85,842

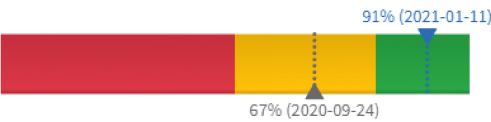
5 Year IT Budget Running Average: \$82,405



Overall Performance Comparison +24%



PreSales Assessment
2020-09-24 vs. 2021-01-11



Project Updates:

- 🕒 Security Awareness Training - Completely deployed and in use.
- 🕒 M365 MFA - 80% deployed and on target.

Top Risks:

- 🕒 Network equipment is aged, causing application slowness, and highly unreliable
- 🕒 Windows 7 is unsupported by Microsoft
- 🕒 Server 2008 is unsupported by Microsoft

Remediation Recommendations:

- 🕒 Network Infrastructure Project to remediate performance and reliability issues.
- 🕒 Windows 7 desktop replacement project.
- 🕒 Server Replacement as soon as budget allows

Your clients are busy. Inserting an Executive Summary helps you give them near term, actionable updates in a short, digestible format.

Asset List

Virtual Server (1)													
Device Name	Status	Last User (RMM)	Location	Type	Make	Model	Serial Number	Operating System	Purchase Date	Warranty Expiration	End of Life	Replacement Cost	Age
SecondaryDC01	Active	AzureAD\alex.farling	Ocean View Store	Virtual Server		VMware Virtual Platform	VMware-56...	Microsoft Windows Server 2008 R2	2015-01-15	2020-01-14	2020-01-14	0	7.2

Server (1)

Device Name	Status	Last User (RMM)	Location	Type	Make	Model	Serial Number	Operating System	Purchase Date	Warranty Expiration	End of Life	Replacement Cost	Age
PrimaryDC01	Active	Admin1	Lewes Store	Server	HP	Proliant MicroServer	5C7319P15X	Microsoft Windows Server 2012 Sta	2013-09-17	2018-10-16	2020-09-17	11000	8.6

Workstation (30)

Device Name	Status	Last User (RMM)	Location	Type	Make	Model	Serial Number	Operating System	Purchase Date	Warranty Expiration	End of Life	Replacement Cost	Age
Jump-Box-PC	Active	Admin	Ocean View Store	Workstation	Dell	OptiPlex 755	F9SW3H1	Microsoft Windows 7 Professional	2008-08-11	2011-08-12	2020-04-27	1501	13.7
BXCKHX1	Active	AzureAD\Test_User	Lewes Store	Workstation	Dell	OptiPlex 7010	BXCKHX1	Windows 7 Professional	2013-08-13	2016-08-13	2020-08-13	1900	8.6
D8YSHX1	Active	Admin1		Workstation	Dell	OptiPlex 7010	D8YSHX1	Microsoft Windows 7 Professional	2013-11-20	2016-11-21	2020-11-20	1111	8.4
D8XRHX1	Active			Workstation	Dell	OptiPlex 7010	D8XRHX1	Microsoft Windows 7 Professional	2013-11-20	2016-11-21	2020-11-20	2200	8.4
DESKTOP-1T18GLQ	Active				HP	23-q150z	4C1548061F	Microsoft Windows 10 Home x64	2015-12-04	2016-12-03	2022-12-04	1100	6.3
G8HTDB2	Active				Dell	OptiPlex 3040	G8HTDB2	Microsoft Windows 10 Pro x64	2016-04-22	2019-07-21	2023-04-22	1750	6.0
GSXSV62	Active				Dell	OptiPlex 3040	GSXSV62	Microsoft Windows 10 Pro x64	2016-10-15	2019-10-27	2023-10-15	1750	5.5
GTT9XD2	Active			Workstation	Dell	OptiPlex 3040	GTT9XD2	Microsoft Windows 10 Pro x64	2016-10-15	2020-01-13	2023-10-15	1750	5.5
GSWDD92	Active	AzureAD\Agail.Taylor	Ocean View Store	Workstation	Dell	OptiPlex 3040	GSWDD92	Microsoft Windows 10 Pro x64	2016-10-15	2019-10-27	2023-10-15	1750	5.5
GVCPDP2	Active	AzureAD\LizSmith	Ocean View Store	Workstation	Dell	OptiPlex 3040	GVCPDP2	Microsoft Windows 10	2016-10-15	2019-10-27	2023-10-15	1750	5.5

Supporting like Asset Lists, User Lists, and Contract Lists may not warrant a full discussion in every QBR, but add a nice support layer to your discussion around Risk and Budget.

Device Name	Status	Last User (RMM)	Location	Type	Make	Model	Serial Number	Operating System	Purchase Date	Warranty Expiration	End of Life	Replacement Cost	Age
DESKTOP-OL292AC	Active	DESKTOP-OL292AC\ Warehouse PC	Warehouse	Workstation	Dell	Inspiron 15-3567	8X5F4L2	Microsoft Windows 10 Home x64	2018-03-05	2019-06-04	2025-03-05	2500	4.1
DESKTOP-R16LDH5	Active	AzureAD\joann.carletti	Ocean View Store	Workstation	Dell	OptiPlex 7050	D0QVXM2	Microsoft Windows 10 x64	2018-03-06	2021-04-10	2025-03-06	1750	4.1
DESKTOP-I101P4F	Active	AzureAD\alexa.stern	Ocean View Store	Workstation	Dell	OptiPlex 7050	CZQVXM2	Microsoft Windows 10 Pro x64	2018-03-06	2021-04-10	2025-03-06	1750	4.1
DESKTOP-48TTR4S	Active	AzureAD\stacy.hagy	Ocean View Store	Workstation	Dell	OptiPlex 7050	D0SVXM2	Microsoft Windows 10 x64	2018-03-06	2021-04-12	2025-03-06	1750	4.1
JCFHCP2	Active	AzureAD\POSLEWES1	Lewes Store	Workstation	Dell	OptiPlex 3060	JCFHCP2	Microsoft Windows 10 Pro x64	2018-06-03	2021-07-06	2025-06-03	1000	3.8
72TDIV2	Active	AzureAD\POSSystem	Ocean View Store	Workstation	Dell	OptiPlex 3060	72TDIV2	Microsoft Windows 10 Pro x64	2019-03-25	2022-06-22	2026-03-25	1100	3.0
75RGIV2	Active	AzureAD\CarolynBailey	Ocean View Store	Workstation	Dell	OptiPlex 3060	75RGIV2	Microsoft Windows 10 Pro x64	2019-03-25	2022-06-22	2026-03-25	1100	3.0
75MCIv2	Active	AzureAD\JackAugust	Lewes Store	Workstation	Dell	OptiPlex 3060	75MCIv2	Microsoft Windows 10 Pro x64	2019-03-25	2022-06-22	2026-03-25	1100	3.0
72N9IV2	Active	AzureAD\TKNovikoff	Lewes Store	Workstation	Dell	OptiPlex 3060	72N9IV2	Microsoft Windows 10 Pro x64	2019-03-25	2022-06-22	2026-03-25	1100	3.0
72RFIV2	Active	AzureAD\PattyClark	Ocean View Store	Workstation	Dell	OptiPlex 3060	72RFIV2	Microsoft Windows 10 Pro x64	2019-03-25	2022-06-22	2026-03-25	1100	3.0
72WCIV2	Active	AzureAD\RobinWall	Lewes Store	Workstation	Dell	OptiPlex 3060	72WCIV2	Microsoft Windows 10 Pro x64	2019-03-25	2022-06-22	2026-03-25	1100	3.0
75TCIV2	Active	AzureAD\JustinTaylor	Lewes Store	Workstation	Dell	OptiPlex 3060	75TCIV2	Microsoft Windows 10 Pro x64	2019-03-25	2022-06-22	2026-03-25	1100	3.0
75LBIV2	Active	AzureAD\BarcodeMachine	Ocean View Store	Workstation	Dell	OptiPlex 3060	75LBIV2	Microsoft Windows 10 Pro x64	2019-03-25	2022-06-22	2026-03-25	1100	3.0
75TDIV2	Active	AzureAD\SteveOrtleib	Ocean View Store	Workstation	Dell	OptiPlex 3060	75TDIV2	Microsoft Windows 10 Pro x64	2019-03-25	2022-06-22	2026-03-25	1100	3.0
721HIV2	Active	AzureAD\CraigTaylor	Ocean View Store	Workstation	Dell	OptiPlex 3060	721HIV2	Microsoft Windows 10 Pro x64	2019-03-25	2022-06-22	2026-03-25	1100	3.0
72VFIV2	Active	AzureAD\TomKIngler	Ocean View Store	Workstation	Dell	OptiPlex 3060	72VFIV2	Microsoft Windows 10 Pro x64	2019-03-25	2022-06-22	2026-03-25	1100	3.0
76QDIV2	Active	AzureAD\	Ocean View	Workstation	Dell	OptiPlex 3060	75QDIV2	Microsoft	2019-03-25	2022-06-22	2026-03-25	1100	3.0

Device Name	Status	Last User (RMM)	Location	Type	Make	Model	Serial Number	Operating System	Purchase Date	Warranty Expiration	End of Life	Replacement Cost	Age
		PatPurdum	Store					Windows 10 Pro x64					
7539JV2	Active	AzureAD\ PattMarro	Ocean View Store	Workstation	Dell	Optiplex 3060	7539JV2	Microsoft Windows 10 Pro x64	2019-03-25	2022-06-22	2026-03-25	1100	3.0
72T8JV2	Active	AzureAD\ EileenBurkley	Lewes Store	Workstation	Dell	Optiplex 3060	72T8JV2	Microsoft Windows 10 Pro x64	2019-03-25	2022-06-22	2026-03-25	1100	3.0
NL426337	Active	NL426337\ Jonestown	Lewes Store	Workstation	Seneca	pro212512	426337	Microsoft Windows 7 Professional			2020-12-31	1750	

Network Equipment (20)

Device Name	Status	Last User (RMM)	Location	Type	Make	Model	Serial Number	Operating System	Purchase Date	Warranty Expiration	End of Life	Replacement Cost	Age
Warehouse Router	Active		Warehouse	Network Equipment	SonicWall	TZ300	123456789A		2015-01-01		2022-03-31	650	7.3
Dell SonicWall Dallas	Active		Warehouse	Network Equipment	Dell	SonicWall TZ300	18B169049854		2015-09-25	2018-09-25	2022-09-25	2000	6.5
Dell SonicWall - Warehouse	Active		Warehouse	Network Equipment	SonicWall	TZ300	1239874560		2015-09-18	2020-09-17	2020-09-17	950	6.5
Cisco SF 200 Switch	Active		Warehouse	Network Equipment	Cisco	SF200-24	9466309827157		2016-04-02	2018-04-02	2023-04-02	2000	6.0
Wireless Access Point Lewes	Active		Warehouse	Network Equipment	Cisco	AP541N-A-K9	9466309827493		2016-04-02	2019-04-02	2023-04-02	300	6.0
Cisco WAP561 (POS AP) Cluster Controller	Active		Warehouse	Network Equipment	Cisco	WAP561-A-K9	DN11952A0VV		2016-05-02	2021-05-14	2021-04-02	500	5.9
Cisco WAP561 (Service AP)	Active		Warehouse	Network Equipment	Cisco	WAP561-A-K9	DN11952A0W5		2016-05-02	2017-05-02	2021-04-02	1500	5.9
Cisco WAP561 (Annex AP)	Active		Warehouse	Network Equipment	Cisco	WAP561-A-K9	DN11835A39C		2016-05-02	2021-05-14	2021-04-02	500	5.9
New Dallas Wireless Setup - Cisco WAP561 (Cluster config)	Active		Warehouse	Network Equipment	Cisco	Cisco WAP561			2016-05-02	2021-05-14	2023-05-02	500	5.9
Cisco WAP561 (Warehouse AP)	Active		Warehouse	Network Equipment	Cisco	Cisco WAP561	DN12022A03V		2017-09-01		2024-09-01	500	4.6
UAP-AC-IW-PRO-US	Active	Admin	Ocean View Store	Network Equipment	Ubiquiti Networks, Inc	UAP-AC-IW-PRO	788a205c69a7		2018-04-23	2019-04-22	2025-04-23	249	4.0
UAP-AC-IW-PRO-US	Active		Ocean View Store	Network Equipment	Ubiquiti Networks, Inc	UAP-AC-IW-PRO	788a205c69e9		2018-04-23	2019-04-22	2025-04-23	249	4.0
Datto Alto 3 Backup Device	Active		Warehouse	Network Equipment	Datto	Alto 3	00012E814296		2019-03-01			0	3.1

Device Name	Status	Last User (RMM)	Location	Type	Make	Model	Serial Number	Operating System	Purchase Date	Warranty Expiration	End of Life	Replacement Cost	Age
(Creative Designs)													
Ubiquiti 48 Port PoE Switch	Active		Unknown Location	Network Equipment	Ubiquiti	US-48-500W	9059234509		2019-03-22	2020-03-21	2026-03-22	1200	3.0
Ubiquiti 8 port PoE switch	Active		Unknown Location	Network Equipment	Ubiquiti	US-8-60W	2379058743		2019-03-22	2020-03-21	2026-03-22	200	3.0
Ubiquiti 8 port PoE switch	Active		Unknown Location	Network Equipment	Ubiquiti	US-8-60W	459875339		2019-03-22	2020-03-21	2026-03-22	200	3.0
Ubiquiti 24-port switch PoE	Active		Unknown Location	Network Equipment	Ubiquiti	US-24-250W	0987654321		2019-03-22	2020-03-21	2026-03-22	550	3.0
Cisco SF 200 Switch Login Info	Active		Warehouse	Network Equipment							2021-04-02	500	
New Dell Sonicwall TZ300 - Jonestown	Active		Warehouse	Network Equipment	SonicWall	TZ300	123456789B				2021-08-31	500	
Sonicwall Router	Active		Lewes Store	Network Equipment	SonicWALL	TZ 300	18B1690BCEC					500	

Software (4)

Device Name	Status	Last User (RMM)	Location	Type	Make	Model	Serial Number	Operating System	Purchase Date	Warranty Expiration	End of Life	Replacement Cost	Age
Quickbooks 2019	Active		Warehouse	Software	Intuit	Quickbooks Pro - 3 user	1234-567-4658		2019-05-15		2022-05-15	900	2.9
ShadowProtect Key license key	Active	MSP	Warehouse	Software	Storagecraft	ShadowProtect v1234	1230-1230-1230-1230-1230		2020-01-01	2023-01-01	2026-01-01	950	2.3
New Dell Sonicwall TZ300 - Ocean View	Active		Warehouse	Software	SonicWall	TZ300	123456789C					650	
BDR	Active		Unknown Location	Software	Datto	L3A2000	00012E814296					0	

Printer (1)

Device Name	Status	Last User (RMM)	Location	Type	Make	Model	Serial Number	Operating System	Purchase Date	Warranty Expiration	End of Life	Replacement Cost	Age
Canon iR-ADV C350if	Active		Lewes Store	Printer	Canon	iR-ADV C350if	QNN01698				2023-11-30	5000	

Router (1)

Device Name	Status	Last User (RMM)	Location	Type	Make	Model	Serial Number	Operating System	Purchase Date	Warranty Expiration	End of Life	Replacement Cost	Age
Dell SonicWall	Active		Warehouse	Router	Dell	SonicWall	18B1690BCEC		2015-09-25	2018-09-25	2020-09-25	2000	6.5

Device Name	Status	Last User (RMM)	Location	Type	Make	Model	Serial Number	Operating System	Purchase Date	Warranty Expiration	End of Life	Replacement Cost	Age
Jonestown						TZ300							

User List

Users (12)

First Name	Last Name	Email Address	Location	Connectwise	BSN	Microsoft 365	BSN Latest ESS Score	BSN PFR	BSN Avg Score	BSN Annual Score	Microsoft 365 Assigned Products	Microsoft 365 Last Activity Date	Microsoft 365 MFA Status	Microsoft 365 Authentication Methods
Robin	Wall	robin.wall@AzureAD	Warehouse	✓	✓	✓	725	0	93.75	90	MICROSOFT 365 BUSINESS STANDARD+MICROSOFT POWER AUTOMATE FREE	2021-11-03	Enabled	mobilePhone,appCode
Linda	Swanson	linda.Swanson@AzureAD	Warehouse	✓	✓	✓	443	14	0	90	MICROSOFT 365 BUSINESS STANDARD	2021-11-02	Enabled	mobilePhone
Liz	Smith	Liz.Smith@AzureAD	Warehouse	✓	✓	✓	459	11	0	95	MICROSOFT 365 BUSINESS STANDARD+MICROSOFT POWER AUTOMATE FREE	2021-11-02	Enabled	mobilePhone
Beth	Rendel	beth.rendel@AzureAD	Warehouse	✓	✓	✓	458	4	0	80	MICROSOFT 365 BUSINESS STANDARD	2021-10-14	Disabled	
Steve	Ortleib	steve.ortleib@AzureAD	Warehouse	✓	✓	✓	476	6	0	95	MICROSOFT 365 BUSINESS STANDARD	2021-11-03	Enabled	mobilePhone,appCode
Stacy	Orem	stacy.orem@AzureAD	Warehouse	✓	✓	✓	350	0	0		MICROSOFT 365 BUSINESS STANDARD	2021-11-03	Enabled	mobilePhone,appCode
TK	Novikoff	tk.novikoff@AzureAD	Warehouse	✓	✓	✓	712	0	95	80	MICROSOFT 365 BUSINESS STANDARD	2021-11-02	Enabled	mobilePhone,appCode
Jeanne	Mueller	Jeanne.Mueller@AzureAD	Warehouse	✓	✓	✓	485	0	0	90	MICROSOFT 365 BUSINESS STANDARD	2021-11-02	Enabled	mobilePhone
Patti	Marro	patti.marro@AzureAD	Warehouse	✓	✓	✓	403	22	0	80	MICROSOFT 365 BUSINESS STANDARD	2021-11-03	Enabled	mobilePhone,appCode
Thom	Lockhart	thom.lockhart@AzureAD	Warehouse	✓	✓	✓	444	11	0	85	MICROSOFT 365 BUSINESS STANDARD	2021-11-03	Enabled	mobilePhone,appCode
Steve	Jonestown	Steve.Jonestown@AzureAD	Warehouse	✓	✓	✓	333	6	0		MICROSOFT 365 BUSINESS STANDARD	2021-11-02	Enabled	mobilePhone,appCode
Billing	Contact	office@AzureAD	Warehouse	✓		✓					MICROSOFT 365 BUSINESS STANDARD	2021-11-02	Enabled	mobilePhone

Contract List

Contracts (19)

Vendor	Account	Status	Description	Location	Cycle	Cost	Cost Type	Next Due	End Date	Notice Date	Auto Renew?	Linked Assets
Microsoft	Office 365	Active	Email and Office Apps		Monthly	482	Actual	2021-04-01	2023-04-01	2023-03-29	✓	SecondaryDC01
Lights-Out MSP	Managed Services	Active	Managed Services + Disaster Recovery		Monthly	3500	Actual	2021-04-01	2023-01-01	2022-12-02	✓	SecondaryDC01
Verizon	OneTalk VoIP + ISP	Active	Phone and Internet Service. 32 phones 1GB symmetrical FIOS		Monthly	750	Estimated	2021-04-15	2022-05-15	2022-05-15	✓	
LoB Vendor #2	Sales	Active	CRM & Sales Management software vendor		Annual	2500	Actual	2022-04-15	2024-04-14	2024-03-15		
Amy's Threat Detection Services	IT	Active			Monthly	149	Actual	2022-04-15	2022-06-15	2022-04-16	✓	Dell SonicWall Jonestown
Threat Detection Service Renewal	01-104-8010	Active			Semi-Annual	1200	Actual	2022-04-17	2023-12-18	2023-12-18	✓	Dell SonicWall Dallas
Verizon	Cellular Phones	Active	Cell Phones & Data Plans (iPads)		Monthly	500	Estimated	2022-04-28	2023-07-01	2023-07-01	✓	Datto Alto 3 Backup Device (Creative Designs)
LoB Vendor #1	Finance	Active	This is the customer's primary line of Business Application		Monthly	375	Actual	2022-05-01	2022-12-31	2022-12-01	✓	D8VSHX1
MDM Software	IT	Active	Mobile Device Management Software		Monthly	149	Actual	2022-05-01	2023-03-31	2023-03-01		SecondaryDC01
Microsoft Azure		Active	Cloud File Server and Directory Services		Monthly	800	Actual	2022-05-01	2026-12-31	2026-12-01		
security stuff	IT	Active	Get your security		Monthly	149	Actual	2022-05-01	2023-12-01	2023-11-01		
MDM Software	IT	Active	Mobile Device Management Software		Monthly	149	Actual	2022-05-01	2024-01-01	2023-12-02		
MDM Software	IT	Active			Monthly	149	Actual	2022-05-01	2023-11-30	2023-10-31		
Can you Hear Me Now.co	Communications	Active	This is the main phone system for the company		Monthly	275	Estimated	2022-05-01	2024-02-29	2023-12-31	✓	
The Copier Dude	Print/Copy Services	Active	Cost per page - 3 copiers and 5 printers.		Quarterly	535	Estimated	2022-07-01	2023-01-01	2022-10-03	✓	
Meraki	Networking	Active	Meraki Renewals		Every 2 Years	150	Actual	2023-07-01	2024-06-30	2024-05-31	✓	Cisco SF 200 Switch, BXCKHX1
Threat Detection	Superbad	Active	testing words about		Every 2	1500	Actual	2023-08-16			✓	

Vendor	Account	Status	Description	Location	Cycle	Cost	Cost Type	Next Due	End Date	Notice Date	Auto Renew?	Linked Assets
Services			testing things		Years							72TDIV2, 75RGIV2, 75MCIV2, 72N9IV2, 72RFIV2, 72WCIV2, 75TCIV2, 75LBIV2, 75TDIV2, 721HIV2, 72VFIV2, 76QDIV2, 7539IV2, 72T8IV2
Great America	Leasing	Active	Financing for machine replacement		Monthly	375	Estimated	2024-06-30			✓	
Meraki	Networking	Active	Meraki Licensing - Biannual renewal	Lewes Store	Every 5 Years	800	Actual	2026-10-01	2023-09-30	2023-08-31	✓	