

Setup worksheet

Fill this in as you follow the setup guide (techsavve.com/setup), then keep it with your IT records. Every box can be typed into and saved. Do not write passwords, client secret values or the backup password here: write WHERE each is kept (for example "Password manager > TechSavve").

Company name

Prepared by

Date

1. The server

Where TechSavve RMM runs (guide step 1).

Runs on ☐ Linux server ☐ Windows PC

Hosted ☐ AWS ☐ Other cloud ☐ On premises

Server name

Operating system and version

Internal IP address

Public IP address

Install folder default /opt/techsavve

Administrator email (first account)

2. Addresses and DNS

Guide step 3. A records point at the server; email records protect the sending domain.

Console address <https://rmm.domain.com>

Password vault address <https://vault.domain.com>

TechSavveRDP address rdp.domain.com

Public IP the A records point at

TechSavveRDP server key public key shown under Admin > TechSavveRDP; safe to note

Domain the platform sends from domain.com

DNS is hosted at GoDaddy, Cloudflare, Route 53 ...

Done ☐ Console A record ☐ RDP A record ☐ Vault A record ☐ SPF ☐ DKIM ☐ DMARC

Open ☐ 443 ☐ 80 ☐ RDP TCP 21115-21117 ☐ RDP UDP 21116 ☐ 3478 + 49160-49360

Certificate ☐ Let's Encrypt (Admin > SSL Certificates) ☐ Own certificate

Certificate domain

Certificate renews / expires

3. Microsoft 365 / Entra

Guide step 3. Entered under Admin > Platform settings > Single sign-on & mail (Microsoft Entra).

Tenant ID (Directory ID)

NOC App - Client ID

NOC App redirect URI https://rmm.domain.com/

NOC API App - Client ID

NOC API App - Application ID URI api://<client ID>

NOC Mail App - Client ID

NOC Mail App - Tenant ID blank = same tenant

Mail App secret: where it is kept

Mail App secret expires on

NOC API App ☐ access_as_user scope ☐ Token version 2 (manifest) ☐ NOC App authorized

NOC App ☐ SPA redirect added ☐ Graph + access_as_user consented

Mail App ☐ Mail.Send (Application) granted ☐ Access policy set ☐ Test email sent

Access policy group (sender mailboxes)

SMTP app - Client ID (optional) reports over 2.9 MB

SMTP app secret: where it is kept

SMTP app secret expires on

4. Mailboxes

Shared mailboxes are fine for sending; a distribution group cannot send.

Address

Used for

Type (shared / user)

Email sent through ☐ Microsoft 365 (NOC Mail App) ☐ SMTP server

SMTP host (if SMTP)

SMTP port and security 587 STARTTLS / 465 SSL

5. Password vault email

The vault sends with an SMTP username and password (guide step 3).

Vault sends through ☐ Amazon SES ☐ Microsoft 365 relay ☐ Relay service ☐ Own mail server

SMTP host email-smtp.<region>.amazonaws.com

Port

SMTP username

SMTP password: where it is kept

Vault admin token: where it is kept

Vault sender address vault@domain.com

6. License

Guide step 5: Admin > License.

Activation ☐ Purchase code (online) ☐ License key (offline)

License / order number

Licensed for (devices, customers)

Trial started on

Activated on

7. Technicians

Admin > Local Account Users & Security > Invite user.

Name	Email	Role	2-step on
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

8. First customer and sites

Guide steps 6 and 7: Tenants > Add tenant, then Sites > Add site.

Customer (tenant) name

Site name	Address	Collector machine	Collector IP
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

9. Device access

Guide step 8: Write where each credential is kept, never the password.

Kind	Account / community	Where the password is kept

10. Backups and support

Guide step 10: Admin > Backup & Restore.

Backup password: where it is kept	Off-server copy goes to cloud storage / network share
Full backup tested on	Next upgrade check
TechSavve support assistance@techsavve.com · (214) 430-9342	Your notes