**[Customer]/[Partner]- Cloudflare onboarding checklist**

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# Document Control and References

|  |  |
| --- | --- |
| **Document Name:** | Customer onboarding document for *[ COMPANY NAME ]* |
| **Document Identification:** | Version 1.0 |
| **Document Owner:** |  |
| **Document Author:** |  |
| **Summary of Changes:** | |  |  |  | | --- | --- | --- | | **Version**  **Number** | **Version**  **Date** | **Nature of Change** | | 1.0 |  |  | |
| **Document**  **Approver(s):** | Each version of this document will be approved by: |
| **Location of Latest Version:** | The latest version of this document is stored and available at: *[ LINK TO THIS DOCUMENT ]* |

# Key Contacts

**[Partner]/Cloudflare**

|  |  |
| --- | --- |
| **Role** | **Email, Phone** |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

**[ CUSTOMER NAME ]**

|  |  |
| --- | --- |
| **Role** | **Email, Phone** |
|  |  |
|  |  |
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|  |  |
|  |  |
|  |  |

# Pre-onboarding checklist

This list must be completed, and all relevant information must be added to this document prior to scheduling an onboarding call with a Cloudflare Solutions Engineer.

1. Create a Cloudflare account (if you already have an account, share the email address).
2. Add your domain(s) to Cloudflare, but **do not** finalize the setup process.
3. [Decide on a setup type](https://support.cloudflare.com/hc/en-us/articles/203685674-Partner-domain-setup-options-CNAME-vs-Full-). Cloudflare offers two:
   1. Full (Cloudflare becomes your authoritative DNS provider)
   2. Partial (maintain your existing authoritative DNS provider, delegate one or more CNAMEs to Cloudflare)

In order to make the most of your onboarding session please ensure that you are able to make changes to your domain’s current authoritative DNS or registrar provider.

## **Account**

A Cloudflare account has been created under the email address ***[ address to be filled out by AE ]***. One Enterprise quota has been assigned to this account.

## **Domain(s) and SSL Requirement**

The following domain(s) will be added to Cloudflare. Please add whether TLS is required, and whether Cloudflare should issue the certificate or if the customer will bring their own.

|  |  |  |
| --- | --- | --- |
| **Domain** | **TLS required?** | **Cert Type?** |
|  |  | Universal/Dedicated/Custom/Upload/EV |

## **Existing Connectivity Diagram & Configuration Information**

Draw an existing connectivity diagram on how the web application is connected

Note any existing environment or configuration that the implementation team needs to be aware of. *(e.g on premise load balancer, on premise WAF, ELB configuration, etc.)*

## **Final Connectivity Diagram & Final Configuration**

Note any specific feature/configuration changes made for the domain(s) listed above here *(ex: enabled A, B, C and disabled X, Y, Z features)*.

**Spectrum Configuration (if any)**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Spectrum DNS Record** | **Edge Port** | **Origin IP Address/LB DNS Record** | **Origin Port** | **Additional Config** |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

**Load Balancing Configuration (if any)**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **LB DNS Record** | **Pool Name** | **Hostnames / Weight** | **IP Address** | **Health Check Configuration** | **Traffic Steering** |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

# Onboarding Timeline

Timeline of the following domain(s) will be added to Cloudflare.

|  |  |  |
| --- | --- | --- |
| **Domain(s)** | **Onboarding Target Date** | **Remarks** |
|  |  | Note on any pending items/pre-reqs |