

AI Application & Custom Software Handover Requirements

A practical checklist for any AI, automation, integration or custom software project

Prepared by Anvil Solutions Ltd | October 2026

How to use this checklist

Use this checklist at the start of any AI, automation, integration or custom software project, and share it with your developer, consultant, agency or contractor so expectations are clear from day one.

Every item should be complete before the solution goes live, and before final payment is released.

Good vendors already work this way. A complete handover protects you, and it protects them too, because the next person to support the system can do so without guesswork.

The ownership principle

Every production system is built on accounts that your business owns.

Developers, contractors, consultants and agencies are given access, never ownership. No production system relies on a personal account belonging to any individual, including your own staff.

1. Business ownership

Confirm that the customer owns:

- ☐ All production accounts
- ☐ All cloud subscriptions
- ☐ All domains
- ☐ All source code
- ☐ All application data
- ☐ All API credentials
- ☐ All SaaS subscriptions
- ☐ All billing relationships

2. Account security

Confirm, before the solution goes live:

- ☐ Dedicated customer-owned accounts, such as automation@yourcompany.co.nz
- ☐ Multi-factor authentication enabled on every account
- ☐ Passkeys configured where the platform supports them
- ☐ Recovery email set to a customer-controlled address

- ☐ Recovery phone set to a company number, not anyone's personal mobile
- ☐ Secondary administrator assigned
- ☐ Break-glass recovery process documented
- ☐ Credentials stored in the customer's password manager
- ☐ No account has ever been owned by the developer or any individual

3. Documentation

Provide:

- ☐ System overview
- ☐ Architecture diagram
- ☐ Infrastructure documentation
- ☐ Integration documentation
- ☐ API documentation
- ☐ Data flow documentation
- ☐ Configuration documentation
- ☐ User guide
- ☐ Administrator guide
- ☐ Troubleshooting guide
- ☐ Maintenance procedures

4. Recovery and continuity

Provide:

- ☐ Backup process documented
- ☐ Restore process documented
- ☐ Disaster recovery procedure documented
- ☐ Rollback procedure documented
- ☐ Vendor support contacts supplied
- ☐ Escalation paths documented
- ☐ Support ownership assigned
- ☐ Recovery testing completed

5. Access and credentials

Document where each item lives and who owns it. Record the location, never the secret itself.

- ☐ Administrative accounts
- ☐ Service accounts

- ☐ API keys
- ☐ Certificates
- ☐ DNS records
- ☐ Hosting details
- ☐ Cloud tenant information
- ☐ Subscription details
- ☐ Licence ownership

6. AI-specific requirements

Document:

- ☐ AI platform used
- ☐ Model provider
- ☐ Prompt repository location
- ☐ System prompts
- ☐ Custom instructions
- ☐ Knowledge sources
- ☐ Training data sources
- ☐ Usage limitations
- ☐ Cost controls
- ☐ Responsible AI controls

7. Operational handover

Confirm:

- ☐ Walkthrough completed
- ☐ Knowledge transfer completed
- ☐ Support process agreed
- ☐ Documentation delivered
- ☐ Credentials held in the customer's password manager, never sent by email or chat
- ☐ Ownership of every account verified by the customer
- ☐ Customer acceptance completed

Sign-off

Vendor confirmation

All items in this checklist are complete.

Name: _____

Company: _____

Signature: _____ Date: _____

Customer acceptance

The handover has been checked and accepted.

Name: _____

Signature: _____ Date: _____

Final payment released on: _____

Questions?

Anvil Solutions is a Technology Solutions Provider in West Auckland. If you would like help setting up customer-owned accounts before a project starts, or reviewing a system you already have, call us on 09 579 5432 or email support@anvil.net.nz.