



Customer Documentation Sample Guide

What useful customer documentation looks like and how to read this sample library

Prepared for Harborlight Design Studio | Fictional demonstration environment

This guide introduces eight examples of the records Tyler's Tech Company can prepare for a customer environment. The examples show useful structure, evidence labels, operating context, and decision support. They do not describe a current or former customer.

Document Control

CLASSIFICATION	Public fictional sample	VERSION	1.0
DOCUMENT OWNER	Tyler's Tech Company	EVIDENCE DATE	September 5 2026
REVIEW CADENCE	Quarterly and after material change	SAMPLE STATUS	Public fictional example

What This Sample Pack Demonstrates

A well-documented environment gives leadership and support teams a shared record of what exists, who owns it, how it is supported, what has been checked, and what still needs a decision. The documents in this pack connect daily operations with recovery and planning rather than treating documentation as a one-time inventory exercise.

- Business context and support boundaries that make technical details easier to interpret.
- Evidence dates and status labels that separate confirmed facts from reported information, plans, and open questions.
- Maintained operating records for employee access, backups, projects, incidents, lifecycle decisions, and quarterly planning.
- Clear ownership so the customer, TTCO, and outside providers can see who is responsible for the next action.

Using the Public Samples

Each document in this library is a fictional example intended to show the structure and practical value of customer documentation. It does not describe a current or former customer, and it does not create a service scope, commitment, or guarantee.

Sample Document Index

No	Document	What it helps the customer understand	Sample status
01	Client Technology Overview	Environment summary, critical services, support scope, ownership, priorities, and limits.	Fictional example
02	Environment As Built and Systems Map	Cloud services, site infrastructure, identity, data, dependencies, and resilience.	Fictional example
03	Asset Service and Lifecycle Register	Equipment and subscriptions, business roles, owners, and lifecycle decisions.	Fictional example



No	Document	What it helps the customer understand	Sample status
04	Employee Lifecycle Runbook	Approval, access, device, role-change, offboarding, and closure steps.	Fictional example
05	Backup and Recovery Readiness Plan	Protected workloads, recovery priorities, monitoring, tests, and open gaps.	Fictional example
06	Security Baseline and Improvement Roadmap	Safeguard coverage, prioritized risks, owners, and sequenced improvements.	Fictional example
07	Project Closeout and Technical Handoff	Completed changes, validation, handoff, ownership, and remaining work.	Fictional example
08	Quarterly Technology Review	Support trends, operating health, projects, lifecycle decisions, and next-quarter work.	Fictional example

Evidence and Status Labels

Every status should be read together with its evidence date. Technology environments change, so older records should be rechecked before a sensitive decision, system change, or recovery action.

Label	Meaning in a real customer document
Verified	Confirmed from an authoritative source, administrative readback, or bounded observation on the stated date.
Customer confirmed	Provided and affirmed by an authorized customer contact; independently checked only when noted.
Provider reported	Reported by a service provider or management console and not independently demonstrated unless noted.
Tested	Demonstrated through a recorded test with a defined scope, date, and result.
Planned	Approved or scheduled work that has not yet been completed and read back.
Proposed	A recommendation for customer consideration; it has not been approved or implemented.
Not verified	Information is missing, outdated, conflicting, or awaiting access to an authoritative source.
Out of scope	Intentionally excluded from the current agreement, project, or document.

Public Samples and Live Customer Records

Public sample	Live customer documentation
Uses a fictional company, generalized systems, reserved example identifiers, and non-sensitive diagrams.	Uses customer-approved details that are relevant to the agreed service or project scope.
Shows document structure and representative evidence labels.	Records evidence sources, verification dates, owners, approvals, and exceptions for the real environment.



Public sample	Live customer documentation
Omits credentials, administrative endpoints, serial numbers, exact network configuration, and exploitable weaknesses.	Protects confidential operational details and still keeps reusable secrets in the approved credential vault, not in the document.
Illustrates what may be documented without creating a service guarantee.	Reflects the executed agreement, current service boundaries, and verified customer requirements.

Data Handling

Customer documentation can contain confidential information about people, systems, vendors, assets, network design, security controls, and operating procedures. Distribution should be limited to authorized recipients and approved storage locations.

Passwords, multifactor authentication seeds, recovery codes, private keys, access tokens, and backup encryption keys do not belong in these documents. They remain in the customer's approved credential-management system. Public samples use fictional information and should never be populated with live secrets.

How Documentation Supports the Business

Onboarding and Role Changes

Repeatable records connect approvals, accounts, devices, applications, security requirements, and responsible parties. Completion evidence makes missed steps easier to find and correct.

Day to Day Operations

Support teams can identify systems, owners, vendors, dependencies, renewal dates, and known boundaries more quickly. A maintained record also provides a better starting point for troubleshooting and vendor coordination.

Recovery and Continuity

A recovery plan identifies business priorities, backup coverage, dependencies, contacts, decision points, and tested versus untested procedures. It supports a coordinated response but does not replace regular restore testing or professional incident response.

Technology Planning

Asset age, support status, open risks, recurring costs, dependencies, and proposed improvements can be reviewed together. Leadership gains a clearer basis for budgeting, sequencing projects, and deciding what should happen next.

Keeping the Record Current

Documentation is most useful when it is treated as an operating resource. TTCO can establish a review cadence based on the customer's services, rate of change, and risk. Material changes, employee events, recovery tests, projects, and provider changes should update the relevant record rather than wait for the next annual review.

Available format. Each public example is provided as a PDF for convenient viewing and download. Live customer documentation is tailored to the authorized environment, scope, and evidence available at the time.

Revision History

Version	Date	Change	Prepared by
1.0	September 2026	Public sample release	Tyler's Tech Company