



## Master Service Form

2026v1 | Updated March 2026

### Firm Contact Information (Required)

<b>Firm Name</b>			
Primary Address			
City		State/Province	
Zip		Phone	
Website			

### Account Owners (Required)

#### Own the data

Account Owners own the actual data and overarching account with Uptime. Only account owners can request data copies/exports or cancel services. Only Account Owners can update Account Admins. Generally, the Account Owner is the owner of the firm or the equity partners of the firm.

Owner Name	Title & Role	Email	Phone

## Account Admins

### Can make changes to the account (permissions and billing changes)

Account Admins are not owners but have permission to make security and billing changes to the account such as adding or removing users, adding computers, adding emails to a distribution group, requesting password changes for users, or changing the file or folder permissions. Account Admins can request changes to user accounts but not Owner accounts. Only Owners can request changes to Owner accounts (such as email forwarding, permission changes, password changes). Account Admins can change other contacts include the Primary Technical Contact and Ticket CC.

Account Admins are generally the office manager or firm administrator. If no admin is listed, only the Account Owner will be permitted to make security and billing changes.

\*Note that all Owners (listed above) are, by default, Account Admins

Admin Name	Title & Role	Email	Phone

## Primary Technical Contact (Required)

### Day-to-Day IT Contact for Uptime

The Primary Technical Contact is the person Uptime should work with for ongoing technical matters, outside of individual user requests or issues. The Primary Technical Contact is often times the in-house IT Manager, head of the firm’s IT committee, Firm Administrator, or Office Manager.

\*Note that Primary Technical Contacts are not Account Admins unless also listed in the Account Admin section above.

Name	Title & Role	Email	Phone

## Uptime Ticket CC

**Will be automatically added to (cc'd) all Uptime help desk tickets** (all communications on all help desk tickets)

Some firms like to have a contact cc'd on all help desk tickets. Uptime can accommodate this but you need to be aware of the risks: the cc'd person will see and have access to all information submitted in a help desk ticket or a ticket that's transferred to Uptime's help desk. This could include confidential information such as requests to remove users or permission change requests. Because of this, Uptime recommends that only Owners or Account Admins should be added as an automatic cc.

Name	Title & Role	Email	Phone

## Additional Stakeholders

Additional stakeholders could include members of your IT committee, practice area leads, or other important firm or technical contacts.

\*Informational only, no added permissions unless also listed in the Owner or Admin section above.

Name	Title & Role	Email	Phone

### Billing Information

Invoices will be emailed to your firm.

#### Primary Billing Contact (Required)

Name	
Title / Role	
Direct Dial	
Email	

\*We recommend that invoices go to a specific person and an email distribution group, such as `payables@your-firm.com`, which forwards to multiple people in your firm. This way you ensure the invoice is received regardless of whether your main billing contact is in the office.

#### Alternate Billing Contacts (Recommended)

Alternate Billing Contact Name	Title / Role	Email	Phone

### Signature

The above contact information is accurate, complete and represents the access and permissions Client wants Uptime to use in providing day-to-day Services under the Master Service Agreement and related Service Level Agreements.

Firm Name ("Client")	
Signed By	
Signature	
Title	
Date	