

What We Run And Where

Most small businesses cannot describe their own systems, which makes every decision slower and every emergency worse. This is the document that fixes it.

Fill it in once. Review it every six months. Keep a copy somewhere that does not depend on the systems it describes.

Core platforms

System	What it does	Who administers it	Where the data lives	Renewal date
Email and files				
Accounting				
Banking				
CRM or client records				
Payroll				
Website and hosting				
Domain registrar				
Phone system				
Line of business software				

Backups

What is backed up	To where	How often	Last tested restore	Who checks it

Network

- Internet provider and account number: _____
- Router or firewall model, and who configured it: _____
- Wi-Fi networks in use, and what each is for: _____
- Is there a separate guest network: Yes / No
- Is equipment on its own segment: Yes / No

Access

- Where are passwords kept: _____
- Who has administrator rights, and to what: see the Administrator Access Review template
- Who is the second person who could get in if the first is unavailable: _____

How to store this document

Do not put any passwords in it. It records where things are, not how to get in.

Even without passwords this is a map of your business. Keep it where only the owner and one other person can read it, not on an open shared drive, and keep one printed copy somewhere that does not depend on the systems it describes.

Why this is worth an afternoon

It is the difference between an incident that takes hours and one that takes days, it makes every quote you receive more accurate, and if you ever change providers it is the thing that stops the next one billing you to rediscover what somebody already knew.

Version 1.0, August 2026. Figures in Canadian dollars unless stated. Checked at time of writing; verify anything time-sensitive before relying on it.

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