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The Accountant's Guide to IT Documentation

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Introduction

IT documentation isn’t flashy—but it’s one of the smartest moves a small business can make. Keeping detailed, organized records of your tech setup helps avoid downtime, prevent confusion, and makes things much easier when onboarding staff, changing vendors, or troubleshooting.

This guide will help you build simple, practical IT documentation that protects your firm and keeps things running smoothly.

Why IT Documentation Matters

Most accounting firms run into IT issues at some point. Without documentation, even a minor issue can turn into a major disruption. Having clear, up-to-date records of your systems, tools, and access points means less time guessing—and more time getting back to business.

What to Document

1. Network Setup

Know how your firm is connected.

What to Include:

✅ IP addresses and subnets
✅ Wi-Fi names and passwords
✅ Router/firewall configurations
✅ Internet provider info

2. Hardware and Devices

Keep track of what you own and who's using it.

What to Include:

✅ **Device make/model and serial numbers**
✅ **Assigned users**
✅ **Purchase dates and warranty info**
✅ **Software installed on each device**

3. Vendors and Subscriptions

Stay on top of who supports what.

What to Include:

✅ Contact details for tech vendors (ISPs, software providers, MSPs)
✅ Login info for vendor portals
✅ Renewal dates
✅ Service-level agreements (SLAs)

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04 Credentials and Access

Control access with confidence!

What to Include:

✅ Admin credentials for key platforms
✅ Email logins, cloud logins, etc.
✅ Who has access to what
✅ MFA setup info (if applicable)

📌 **Tip:** Never store passwords in plain text—use a secure password manager.

Tools to Make It Easy (and Secure)

You don't have to rely on Word docs or sticky notes. These tools simplify IT documentation:

- **IT Glue –** Designed for MSPs and internal IT teams, great for structure and control
- **Confluence –** A flexible documentation platform (great if you already use Atlassian tools)
- **Notion or OneNote –** Easy, customizable, and great for small teams
- Password Managers (like LastPass or Bitwarden) – Securely store and share credentials
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🔐 **Bonus Tip:** Use tools with permission control to limit access to sensitive info.

- ## Keeping Your Documentation Up to Date

  Even perfect documentation is useless if it's outdated. Set a routine to keep things current.

  How to Stay Updated:

  ✅ **Review quarterly:** Set a calendar reminder
  ✅ **Update** when you add/remove devices, users, or software
  ✅ **Assign someone** (your IT provider or internal manager) to oversee documentation
  ✅ **Archive** old data instead of deleting—just in case

Final Thoughts: Don't Let Missing Info Slow You Down

Clear IT documentation saves time, protects your firm, and makes your tech easier to manage. It's not just a "tech thing"—it's a smart business move.

Whether you're onboarding a new employee, dealing with a sudden outage, or planning your next upgrade, well-organized IT documentation gives you a head start every time.

Need help building out your IT documentation? We can help. Let's create a clear, secure system that works for your firm.

Contact us today to get expert help securing your business!

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