Dealership IT Vendor Inventory Worksheet

Every vendor, contract, renewal date, cost, contact, data access and failure owner on one sheet.

> **How to use it.** Pull twelve months of technology bills from accounts payable, credit cards included. Give each vendor one row and fill in sections 1 to 4 from the invoices and contracts. Walk sections 5 and 6 with each department manager. Licenses go on their own register. Put every renewal and notice date from 2.2 and 2.3 on a calendar. **Take the cost column from the invoices, not from the contracts.**

The column guide

1 The vendor

- **1.1** Vendor name, exactly as it appears on the invoice.
- **1.2** What it covers, in plain words, such as the internet circuit, phones, copiers or security cameras.
- **1.3** Which rooftops it serves, and whether each store has its own account.
- **1.4** Your account or customer number, so whoever calls gets identified on the first try.

2 Contract and renewal

- **2.1** Contract start date and term length.
- **2.2** Contract end date or the next renewal date.
- **2.3** Does it renew on its own? If it does, how many days' notice it takes to cancel or change it.
- **2.4** Who signed it, and where the signed copy is kept.

3 Cost

- **3.1** Monthly cost, taken from the last three invoices rather than the original quote.
- **3.2** Which store or GL account pays it.
- **3.3** Price increase terms, per-seat charges and any overage fees.

4 Who calls them

- **4.1** The person at the store who calls this vendor today.
- **4.2** The vendor's support line or portal, and its support hours.
- **4.3** Your account manager or escalation contact at the vendor.

5 Data and access

- **5.1** Which systems or customer data it can reach, such as the DMS, Microsoft 365, the network or credit applications.
- **5.2** How it gets in: remote access, an integration, an admin account, or not at all.
- **5.3** Who at the dealership approved that access, and when.
- **5.4** The date someone last checked that the access is still needed.

6 When it fails

- **6.1** What stops working at the store when this vendor's system goes down.
- **6.2** Which other vendor's system it meets, and who owns the fix where the two connect.
- **6.3** The workaround until it's back, and who decides to use it.

7 License register

One row per product. Seats paid for next to seats in use shows licenses still billed for people who have left. Hardware goes on your asset inventory, not here.

Vendor register, part A

Sections 1 to 3. One row per vendor; the grey words are common categories to start from.

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1.1 Vendor	1.2 What it covers	1.3 Rooftops	1.4 Account no.	2.1 Start and term	2.2 End or renewal	2.3 Auto-renew and notice	2.4 Signed by, copy kept	3.1 Monthly cost	3.2 Store or GL	3.3 Increases and fees
Internet carrier and circuits										
Phone system and phone service										
Network, Wi-Fi and firewalls										
Cybersecurity										
Microsoft 365 and email										
DMS										
Copiers and printers										
Security cameras and door access										
Website, domain and email marketing										
Backup										
OEM tools and portals										
CRM and department software										

Vendor register, part B

Sections 4 to 6. Repeat the vendor name from part A on the same row.

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1.1 Vendor	4.1 Store contact	4.2 Support line and hours	4.3 Account manager	5.1 Systems and data	5.2 How it gets in	5.3 Approved by, when	5.4 Last checked	6.1 What stops	6.2 Meets which vendor, fix owner	6.3 Workaround, who decides

7 License register

One row per product. Seats paid for next to seats in use shows licenses still billed for people who have left. Hardware goes on your asset inventory, not here.

Product or license	Seats paid for	Seats in use	Assigned to	Renewal date	Expiry date

6.2 Where two vendors' systems meet

Write the owner your store agrees on in the last column.

Where systems meet	Owner we'd suggest	Owner at your store (6.2)
Phones and the internet circuit	Whoever manages the store network, since call quality depends on the network between the two.	
Shop Wi-Fi and OEM tools	The network owner, with the OEM tool's support line on the call when it's needed.	
Copiers and the network	The copier vendor for the device itself, and the network owner for everything up to it.	
Email and the website	Whoever controls your domain's DNS records. Most dealers have to look up who that is.	
Cameras, doors and the firewall	The network owner, with the camera vendor's settings kept on file.	
The DMS at one store	The store network owner first, since a one-store problem usually lives on that store's side.	

Bring the finished worksheet to a complimentary assessment.
We'll compare what your stores pay their vendors today with one accountable team.
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Section 5 follows the service provider oversight duty in the FTC Safeguards Rule, 16 CFR 314.4(f). This worksheet is a planning aid, not legal advice. © 2026 Helion Technologies.