



Your Website Records

A worksheet for tracking the accounts your business runs on

Fill in what you know today. Leave the rest blank and treat every blank as a task. The goal is a single record that anyone in your leadership can pick up and understand, even on a day when you are unreachable.

The platforms and services named throughout are examples only, offered so you know what to look for. Nothing here endorses a particular vendor.

Business name	
Completed by	
Date completed	
Next review date	

Before You Start: Do Not Write Passwords Here

This worksheet records where accounts live and who controls them, not how to get into them. Store the passwords themselves in a password manager such as Bitwarden or 1Password. This sheet should be safe to hand to your accountant or leave in a file cabinet.

1. Your Domain Name

The address people type to reach you. This is the single most important item on this sheet. If you lose the domain, you lose your website and your email at the same time.

Domain name you own	
Any additional domains	
Registrar (where it was purchased)	
Account email on file	
Registrant name listed	
Expiration or renewal date	
Automatic renewal on? (Yes / No)	
Annual cost	
Everyone with access to this account	

How to Find This Without the Login

Search any public WHOIS lookup service for your domain. It will show you the registrar and the expiration date even when you do not have the account credentials. Also search your email for the words "domain renewal" going back several years.

2. Hosting

The server your website files actually live on. Sometimes bundled with your platform, sometimes billed separately.

Hosting company	
Account email on file	
Control panel address	
Plan name	
Renewal date	
Annual cost	
Everyone with access	
Does hosting include your email? (Yes / No)	
SSL certificate provider and expiration	

If You Use Wix, Squarespace, Shopify, or Square

Hosting is included in your platform subscription. Write "included with platform" above and record the details in section 3 instead.

3. Website Platform

The system used to build and edit the site.

Platform (WordPress, Wix, Squarespace, Shopify, Square, other)	
Address you use to log in	
Your username	
Everyone else with administrator access	
Who built the site, and when	
Written contract or invoice on file? (Yes / No)	
Theme, template, or builder in use	
Paid plugins or apps	

4. Business Email

Email provider (Google Workspace, Microsoft 365, host, other)	
Administrator account	
Number of mailboxes	
Cost per mailbox and renewal date	
Any forwarding rules in place	

List every address in use:

Email address	Belongs to	Still needed?

Email address	Belongs to	Still needed?

5. Google Business Profile

For most local businesses this drives more traffic than the website itself.

Profile claimed? (Yes / No / Not sure)	
Profile verified? (Yes / No / Not sure)	
Primary owner email address	
Other owners and managers listed	
Primary category listed	
Hours currently accurate? (Yes / No)	
Number of reviews and average rating	
Who responds to reviews	

Important

A profile that was never verified cannot be transferred to you. If control sits with a former vendor and the profile is unverified, plan on claiming and verifying a new profile rather than waiting on a transfer request that will not go through.

6. Analytics and Search Tools

Google Analytics property name	
Analytics account owner email	
Google Search Console verified? Owner email	
Other tracking installed (Meta pixel, call tracking, chat)	
Who receives the reports	

7. Social Accounts

Platform	Handle or page name	Login email	Who has admin

8. Outside Services Connected to Your Site

Online booking, payment processing, email marketing, forms, live chat, online store, appointment reminders, review requests, and anything else charging your card each month.

Service	Vendor	Account email	Cost	Renewal

9. People and Vendors

Who currently maintains the site	
Their contact information	
What access do they have	
Signed agreement on file? Where is it stored?	
Previous vendors who may still have access	
Former employees who may still have access	
Date access was last reviewed	

10. Backups and Recovery

Are backups running? (Yes / No / Not sure)	
What tool or service creates them	
How often	
Where the backups are stored	
Date a restore was last tested	
Who is able to perform a restore	

A Backup You Have Never Tested Is Not a Backup

Ask whoever maintains your site to restore a copy to a staging location once a year. If nobody can answer where the backups are stored, assume you do not have any.

11. What This Costs You Every Year

Item	Vendor	Renewal date	Annual cost

Total annual cost: _____

12. Warning Signs

Check any that apply. Each one is worth addressing.

- ☐ The domain is registered to someone who no longer works with you.
- ☐ You do not know when your domain expires.
- ☐ Only one person can log in to the website, and it is not you.
- ☐ Your business email ends in gmail.com or yahoo.com instead of your own domain.
- ☐ The Google Business Profile lists an owner you do not recognize.
- ☐ Nobody has confirmed a backup exists in the last year.
- ☐ The site was built more than five years ago and has not been touched since.
- ☐ A charge appears on your card for a service you cannot identify.
- ☐ The person who built your site has stopped responding.

13. Do These in the Next Thirty Days

1. Confirm the domain is registered in your business name, at an email address you personally control.
2. Turn on automatic renewal for your domain and hosting, then set a calendar reminder two weeks before each renewal date.
3. Remove administrator access for anyone who no longer works with your business.
4. Add a second trusted owner to your domain account and Google Business Profile so one person leaving cannot lock you out.
5. Confirm a backup exists and that someone knows how to restore it.
6. Cancel anything on the cost table you cannot explain.
7. Save this worksheet where your leadership can find it, and set a yearly reminder to review it.

Asking a Vendor for Access

Be specific and be pleasant. Vague requests get vague answers. A version that works:

Hi [name], we are updating our internal records. Could you confirm which registrar holds our domain, which company hosts the site, and which accounts you currently have access to? We would also like to add [your name and email] as an administrator on the website and as an owner on our Google Business Profile. Thank you for your help with this.

If you get no response within two weeks, send the same request once more in writing and note the date. Documented attempts matter later if you need to recover an account through a provider.

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Questions after today are always welcome.



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