

MSP Device Inventory Documentation SOP

Document no.	SOP-MSP-008
Revision	1.0
Owner	Documentation Lead
Effective date	October 15, 2026
Review cycle	Every 12 months

1. Purpose

To keep a complete, accurate inventory of every device the MSP manages for each client, so nothing goes unmonitored, unpatched or unprotected and clients can plan replacements before devices fail or lose support.

2. Scope

Applies to servers, workstations, laptops, network equipment, printers, mobile devices and other hardware at managed clients, from first deployment to retirement and disposal.

Definitions

Device record	The inventory entry for one device, holding its identity, owner, location, lifecycle dates and management status.
Agentless device	A device that cannot run the RMM agent, such as a switch, printer or UPS, and must be found by scanning or added by hand.
Reconciliation	Comparing the inventory with the RMM, backup, security and license lists to find devices missing from any of them.
End of life	The date a device or its operating system stops receiving vendor support or security updates.

3. Responsibilities

Documentation Lead	Owns the inventory standard and required fields, and reviews inventory quality across clients.
NOC Technician	Imports devices from the RMM and discovery scans and runs the monthly reconciliation.
Service Desk Technician	Registers new devices at deployment, keeps user and location details current and retires devices.
Technical Account Manager	Plans replacements with the client using warranty and end-of-life data.
Client Point of Contact	Confirms the inventory, reports devices bought or moved without the MSP and approves disposals.

RACI matrix

Activity	Documentation Lead	NOC Technician	Service Desk Technician	Technical Account Manager	Client Point of Contact
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Activity	Documentation Lead	NOC Technician	Service Desk Technician	Technical Account Manager	Client Point of Contact
Define inventory fields and standard	R/A	C	C	I	-
Register and update devices	A	R	R	-	C
Reconcile the inventory monthly	A	R	C	I	-
Plan device replacements	C	-	-	R/A	C
Retire and dispose of devices	I	I	R	A	C

R = Responsible, A = Accountable, C = Consulted, I = Informed

4. Materials and PPE

Materials, tools and systems

- Device inventory in the documentation platform
- RMM device list
- Network discovery scanner
- Backup, security and license consoles
- Vendor warranty lookup portals
- Device disposal and data destruction records

5. Procedure

Step	Task	Owner	Done
5.1	Define the required inventory fields The Documentation Lead sets the fields every device record needs: name, type, make and model, serial number, operating system, assigned user, location, purchase date, warranty end and management status.	Documentation Lead	☐
5.2	Import devices from the RMM The NOC Technician imports or syncs every device with an RMM agent into the client's inventory and maps them to the required fields.	NOC Technician	☐
5.3	Add agentless devices The NOC Technician runs a discovery scan at each site and adds switches, firewalls, access points, printers, UPS units and other agentless devices to the inventory.	NOC Technician	☐
5.4	Record warranty and purchase details The Service Desk Technician looks up serial numbers in vendor portals and records the purchase date, warranty end date and support level for each device.	Service Desk Technician	☐
5.5	Assign devices to users and locations The Service Desk Technician records who uses each device and where it is, and updates the record whenever a device changes hands or moves.	Service Desk Technician	☐
5.6	Register new devices at deployment The Service Desk Technician creates or completes the device record as part of every setup ticket, before the device is handed to the user. Checkpoint: No device is handed over without a complete inventory record linked to the setup ticket.	Service Desk Technician	☐

Step	Task	Owner	Done
5.7	Reconcile the inventory monthly Each month the NOC Technician compares the inventory with the RMM, backup, security and license lists and opens a ticket for every device missing from one of them. Checkpoint: Every device appears in the RMM, security tool and, where required, backup, or has a ticket explaining why not.	NOC Technician	☐
5.8	Flag devices nearing end of life The Documentation Lead runs a quarterly report of devices whose warranty or operating system support ends in the next six months.	Documentation Lead	☐
5.9	Plan replacements with the client The Technical Account Manager reviews the end-of-life report with the client and agrees a replacement plan and budget at the business review.	Technical Account Manager	☐
5.10	Retire devices securely The Service Desk Technician wipes or removes the storage, removes the device from the RMM and other tools and marks the record as retired with the disposal date. Warning: Never release a device for disposal or reuse until its storage is wiped or destroyed and the certificate is filed.	Service Desk Technician	☐
5.11	Confirm the inventory with the client Twice a year the Client Point of Contact reviews the inventory and reports devices bought, moved or lost without the MSP knowing.	Client Point of Contact	☐

6. Quality checks

- Every device record has all required fields completed.
- The monthly reconciliation found no unexplained devices missing from the RMM or security tool.
- Agentless network devices are in the inventory for every site.
- Retired devices have a disposal date and data destruction record.
- End-of-life devices for the next six months are on a replacement plan.

7. Records

- Client device inventory
- Monthly reconciliation report and tickets
- Quarterly end-of-life report
- Data destruction certificates for retired devices

8. KPIs

- Percentage of device records with all required fields
- Number of devices found without an RMM or security agent
- Number of devices past end of life still in service
- Inventory accuracy confirmed in the client review

9. Common mistakes

- Relying on the RMM list and missing every agentless device.
- Not updating the record when a laptop moves to a new user.
- Retiring devices without wiping them or recording disposal.
- Finding out about end-of-life devices only when they fail.

10. Revision history

Revision	Date	Description	Reviewed by
1.0	October 15, 2026	Initial release	Ilia Pirozhenko

Approval

Prepared by	Approved by	Date

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