



Sue West



Professional Organizer
Amherst
New Hampshire
603 765-9267
Sue@OrganizeNH.com

Member of



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TIPS SHEET FOR BUSINESS FILES

Assumes a Service Business
written by Sue West, Space4U, LLC

General

- General guideline: one drawer should suffice for current records.
- Keep business files in a separate drawer from personal files.
- Past years' files: for those you must keep, put these in a box or another file cabinet, in a different part of the house. They should be accessible but not take up current office space.
- Don't use paper clips. Use staples. Clips cause papers to jam.
- Next time you add a paper to your files, take a minute and leaf through a file, discarding old papers. You'll keep up with filing painlessly.
- File you haven't accessed for 3-6 months or more should be boxed up and added to an 'archive' box. This box is kept out of your regular working area.

Desktop File Folders – Most Active Files

Desktop folders are kept on your desk or in the message center/incoming mail organizer. These are used on (roughly) a daily basis.

- Projects in progress (to trap ideas, or to keep on track)
- This week's tickler file (if you use one)
- Prospective clients (in progress) – a short working file of their latest project. All other documents can be kept in your file cabinet.
- "10 minute" file: receipts to enter, mileage to update, contacts to enter, etc.
- Literature requests
- Mail to review
- Mail to take out

File List: Key Files to Have in Your Current Files Cabinet

1. Group like files together by using tabbed, hanging file folders. Within each hanging file, you'll have multiple manila folders. Example: a hanging file for "Financial" may include folders for each of the key tax categories, or "Workshops/Presentations"

may include a folder for each presentation you have done.

2. Here are folder suggestions. How you order or group the folders in the drawer is up to you. Make sure you can easily find what you're looking for.
3. Some people keep a list of files and general contents; they find an index easier to use. Use a label maker or just use pencil.

Sample File Folders List

1. Individual file per prospect and per client
2. Vendors/Partners
3. Marketing: one per campaign; one for research or future ideas
4. Lost Customers (to recontact)
5. Media Contacts
6. Extra forms (proposal, return address labels, materials checklist, invoices, etc.)
7. Expenses
8. Articles to save; research
9. Professional associations, conference materials
10. Insurance/Legal/Accountant
11. Taxes: for this year, a folder to capture incoming receipts, 1099's
12. Bank statements: keep in a box, in a corner of the office (due to bulk). Elasticize by year. Pull out statements which have checks for key tax documents (or use your accounting software to handle for you).
13. Warranties or equipment documents: for technology or other large items. Software can be taken out of boxes and key materials simply kept in a folder or plastic bag on your shelves.
14. Tickler files: one file per month to keep track of future items (or use your calendar software)

PC Files

Organize your PC files similarly to your paper files. Because you'll probably have less to keep on the PC than in paper files, you can group into larger categories, with sub-folders only when the list is so long it's hard to find what you're looking for. Major groups:

- Clients
- Articles
- Financial
- Marketing
- Selling
- Meetings/Associations