

How to: Filing – Prefix/Index

Follow these steps to set-up the filing system after defining it meets your efficiency and efficacy needs. If you are unsure if this is the best fitting system, call Room To Breathe at (916) 444-7666 to assist you.

Step 1) Define umbrella's

Define the overarching or “umbrella” areas in your business. For example, many businesses have Marketing, Finance, Administration, Vendors, Products and Clients as umbrella categories into which files are sorted. You may want consider a different type of filing system for client files dependent upon your specific business. This system will work for clients if there is no specific industry standard for client files in your business.

Step 2) Assign a 3-letter prefix to each umbrella area.

For Example: Marketing = MKT, Finance = FIN, etc.

Step 3) Layout form to use as an index

An index is nothing more than a written account of what files you have filed. Set-up an electronic document in which you can detail the files you will be filing. An example to start with is below. Keep the filing index document electronically (or print-out only one copy for the entire office) and update when new files are added. Ensure that only one person in the office has updating or file-adding capabilities.

PREFIX#	CONTENTS OF FILE	ALSO SEE:
MKT001	Ads in Sacramento Bee	VEN001
MKT002	Business Card Original Design	
MKT003	Metro Chamber Ribbon Cutting	
VEN001	Sacramento Bee – Agreement and Invoices	MKT001
VEN002	Joe Schmoie Ad Company	
VEN003	Le Tip Networking Group	

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Step 4) Create new files

Once you have set up your index, start adding files. Each new file in the appropriate umbrella area gets the next consecutive number. You can reference files in other umbrella areas by putting that file name in the “also see” section. For example: The actual ads you place in the Sacramento Bee are a marketing item and the agreement you sign with the Bee is a Vendor item. See how they are cross-referenced in the example above.

Step 5) Removing files.

Should you not need a particular file any longer, just delete the information in the contents section and re-use the number. For example: If you no longer are going to work with Joe Schmoe Ad Company, delete the name and re-use the number.

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