

Getting Organized For The New Year - Part 2

By Chuck And Sue DeFiore

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In part 1, we discussed a system you could use to organize your office. In this article we will discuss what material is needed to implement that system.

You will need the following items for your office system. Calendar/Daily Planner; Accordion File (1-31); Manila Files with the Months of the Year (Or you can make them up yourself - a lot less expensive); Hanging Files; Manila Files; Boxes and Envelopes (9 x 12).

The calendar/daily planner will contain all appointments, meetings and deadlines for project.

The accordion file dated 1-31, along with the Manila Files with the Months of the Year will contain materials you have tickled. The tickler file is a very popular system in legal offices. Any materials you need to act on by a certain date are tickled, usually one week in advance. It is also used for standardized meetings. For example, if staff meetings are conducted on Friday, place a Manila folder entitled Staff meeting in the Friday slot, and place any agenda items or meeting items in the folder. Remember to tickle it for the day before the meeting, if you need to make up the agenda, or give agenda items to someone else. This system is also excellent for gathering information for client meetings. This system will also serve to give you a clean desk, as you can place To Do items for the next day in your tickle file. It is also used to put in notes to yourself to follow up on certain items.

The hanging and manila folders are for your files. Boxes are for your records and files to be stored in at the end of the year.

The 9 x 12 Envelopes are used to hold your receipts, canceled checks, expenses and income sheets. You should label one envelope Income and place your income sheet in the file and note when any checks come in. Label one other envelope as Expenses and put in it all receipts for purchases, canceled checks, and any other expenses you generate. At the end of the month tally up the monthly totals. I place the month on the envelope and separate my expenses into categories, such as supplies, telephone, utilities, copying, postage, etc., put the total cost next to the category and then a final total. At the end of each month's tally, paper clip or staple that month's receipts together, place them back in the envelope and file for the following month. Since most self employed individuals pay estimated taxes every 3 month period, the envelopes will have 3 months on them, for example, October, November, December. Remember bundle each month's items separately. Seal the envelopes, file them, and then you are ready to calculate the amount to pay the IRS for the next estimated period.

In December of each year:

1. Box up last years files.

2. Make up new hanging files and manila folders for the new year. If you are need of a label program, Avery Pro for the laser is excellent. It is easy to use, you can import files from popular word processing programs and it has its own database manager, which will allow you to re-run these same files for the next year.

3. Enter all standard meetings in your calendar or planner for the coming year.

4. Put all your income, expenses and other records you need for tax preparation in one box. Run your spreadsheet program or financial program to see what your income and expenses came to for the year. Do up a budget for the coming year, a projections sheet to determine how many clients you need to increase profits, and cut any extraneous expenses.

Following this system will enable you to spend more time on growing your business. Good luck.

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