

If I File It, Will I Find It Again

By Carol Halsey

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Every so often, it's a good idea to ask yourself whether your filing system holds up to your demands. Are you able to retrieve records and documents quickly (in 30 seconds or less) or do you spend frustrating hours searching. Or do you have piles of paper around your office because you don't know where to file them.

There are two types of files - active files that hold resource materials which are regularly referred to for information; and permanent files which are rarely referred to but contain records we are required or wish to retain, such as tax and legal records, old customer and order files.

Active filing systems do not include permanent records. They take up valuable space and are referred to only rarely, if ever. It is best to archive these records separately in boxes (clearly marked, of course) or file storage containers in an area that is accessible but out of the way. Which of these records should you keep and which can you trash? Best check with your CPA or accountant first.

Every day filing systems contain only those records and documents referred to on a regular basis to retrieve information necessary for running a business.

Here are a few tips for maintaining an efficient active filing system:

1. Base filing on retrieval, not storage. Instead of asking yourself, "Where should I file this?" ask yourself, "Where would I look for this if I need it?" Then label the file accordingly.
2. Consistently insert new papers into the front of the file folder. When purging files, start from the back where the oldest documents are.

3. Purge files annually. You will be able to find needed items quicker and will save on storage space.
4. Use color coding for easy, quick identification. Office supply stores have all kinds of files and labels to do this.
5. Always name files and alphabetize into your system by file name. A to Z files only work for customers, vendors, accounts payable and receivable.

A well organized filing system frees your mind of that nagging worry - will I be able to find it if I need it? You always will.

Carol Halsey is Founder of Business Organizing Solutions. She is a professional organizer, consultant, speaker, and author. Visit her web site for free articles, ideas and a free time tips Idea Kit, at <http://www.PilestoFiles.com> . Subscribe to her free organizing newsletter, "Organizing Ideas" sent twice a month.

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