

Keeping client files organised

In this world of electronic communications, many small businesses never meet some of their clients. Some might keep in touch only by e-mail so the entire client file is (somewhere) on your PC. In a way, those documents *are* your clients, and being able to find the right one in a timely fashion can determine how successful your relationship becomes.

The system I use is always evolving, but revolves around three things, folders, naming and search tools.

Folders: When I first used personal computers, about a hundred years ago, I and everyone I knew used to populate folders with a certain type of file. All of my spreadsheets were in a folder called Spreadsheets, or maybe I called it Excel. That came about because the open dialogue defaulted to one place, and there was one place to save. Today, I recommend project folders: every file related to a project, be it a Word document, an Excel document or a bunch of jpg pictures is filed in a project folder. That doesn't mean it can't be subdivided in sub folders, and maybe all those pictures *should* be in a folder, just to keep them tidy, but only the pictures *relating to that project* would be there.

I have a business folder, with client folders within that, and project folders inside them. If a project needs some files from another project, I copy them in, and edit them to remove extra information that doesn't relate to the new project. If there's some data which is common to many projects, I might set up a "Common" folder, or put shortcuts in the new folder pointing back to an original.

In Outlook, I store e-mails in a similar structure. If an attachment will only be used for a couple of days, I tend to leave it in Outlook. If it's more permanent, I do a "Save Attachments" or a "Save As" and copy the file to the project folder.

Naming: I will name (or re-name, if it came from elsewhere) a file or an e-mail (in Outlook 2007, change the subject line and save) so that I can tell what the content is. If several versions will exist, I include a revision number. I try not to call something "Final" because it never is! As everything will be in a folder belonging to a client and a project, I don't need to put this information in the file name, although if the file is going to travel, I might do so. Depending on the files you're collecting, it might make sense to consider naming them so that similar files names sort together, or maybe you should use a sub folder. (It's

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possible to overdo the sub-folder thing, to the point where it takes 5 minutes to click down to the file you want, so give it some thought!)

Search Tools: Even with the best conventions, a document or e-mail sometimes decides to hide. When this happens, there are many ways to dig it out. Windows Explorer can search for partial file names or text in the document. It can also sort files by filename, type or date, so if you're looking for a spreadsheet you changed in February for a particular client, you can narrow it down quickly. However, more and more, I find myself using a local content search tool which works like an Internet search on your hard drive. Choose a unique set of words and you should find your document in the results page.

So, that's the basics. On some projects, at a milestone, I send all of the files to a compressed folder, name the zip file with a date, and write the file to a CD which I file in the paper folder. While I also do full backups to a USB drive, that doesn't keep prior versions, and sometimes having a previous version has saved my bacon.