

Get Your Business Documents Organized

A practical administrative checklist from New Heights Business Solutions

- Create consistent file names.
- Separate active and archived documents.
- Create folders by business function.
- Organize invoices and receipts.
- Organize contracts and agreements.
- Create a client/customer folder structure.
- Scan important paper records when appropriate.
- Back up important digital files.
- Remove unnecessary duplicate files.
- Create a simple document-retention routine.
- Review access permissions for shared files.
- Create a basic administrative workflow.

A SIMPLE FOLDER STRUCTURE

- 01 — Business Administration
- 02 — Clients / Customers
- 03 — Finance & Invoices
- 04 — Contracts & Agreements
- 05 — Marketing
- 06 — Operations
- 07 — Archived

NEW HEIGHTS CAN HELP

Need help getting your administrative systems organized? New Heights provides document organization, digital file organization, workflow organization, and administrative support.

Starting at \$25