# Best Practices: Managing Client or Account Records

Creating an efficient filing system for managing client or account records is not as difficult as it may seem. Using the basic principles of all Smead Organomics filing solutions, simply examine and optimize each of the three main components of the filing system:

1. The Finders
2. The Keepers
3. The Storage

A number of factors need to be considered to determine the best solution for your office. An assessment should be made of your current situation, and a set of objectives for the new system should be defined. Once you have these parameters outlined, you can address each of the system components.

## The Finder

One of the first decisions to make is how files will be identified. Clients or accounts can be indexed by name, or by an assigned account number. For small to mid-sized systems, accounts can simply be identified by the name of a person or business. Large filing systems generally use numeric indexing because the risk of misfiled records is minimized. Often clients or accounts already have an assigned number in a computer database that can be used as the identifying number for the files.

Whether you choose alphabetic or numeric indexing, be sure to use color-coding on your file labels to help find files more quickly, and to reduce the risk of misfiled records.

## The Keeper

Many account filing systems can use standard file folders or hanging folders. New documents are routinely added as regular transactions are made. If a specific sequence of documents is needed, use a Fastener Folder product as the Keeper. Fasteners also help divide documents into categories. Hanging folder systems can use Interior Folders to

break down papers into groups, such as different policies for an individual at an insurance agency.

## The Storage

Your choice of filing equipment will determine the tab placement of the Keepers, on top for drawer filing, and on the side or end for shelf filing. When deciding on the Storage for your system, consider how your situation is affected by these factors:

- Physical storage space available
- Number of files to be stored
- Convenience of access by users of the system
- Projected growth
- Security and confidentiality issues
- Legal or regulatory requirements
- Existing filing equipment
- Budget for new equipment and supplies

In general, end-tab shelf filing systems are the easiest to use, save the most space and are the least expensive to set up and maintain. However, if your total number of records is relatively small, traditional drawer filing cabinets located near people's workstations may be the right choice.

Smead Organomics offers a variety of filing solutions for client or account records. Choose the Team Organomics button to find out which one is best for your business. If you need more help, consult your office supplier or request a free onsite analysis by a Smead professional.