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"A COMPLETE IN-AND-OUT BUSINESS PAPER AND DIGITAL FILING SYSTEM"

Introduction

The Biz Organized in-and-out paper and digital filing system, (hereafter, 'The System'), created for business entrepreneurs and businesses in general, is based on the beginning, middle and end system structure. The System proposes that everything you do in business has a **beginning** phase, a **middle** phase and an **end** phase**.** Therefore, when filing business paperwork and digital files, the business user should follow this type of structure to ensure utmost conformity and ease of use.

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The System is comprised of several unique, yet cohesive, components. **First**, there are three common functions for every business - **Administrative Support**, **Day to Day Business Operations** and **Revenue Generation**. The System's filing structure is based on these common business functions.

Secondly, the 'flow' component of The System easily and precisely moves the paper and digital documents and files through it's **beginning**, **middle** and **end** phases by using a fully comprehensive and easy to understand methodology.

As you will see, the idea behind The System is for easy access to your business paperwork, digital files and support material, to always know where everything is located, and to be able to take your thoughts (about business), put them in digital or paper form, and have them flow easily and naturally through The System from beginning to end. This

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will make more sense as we explain the various components of The System in this document.

Finally, the 'in-and-out' system, along with your business (as a whole), will use various supplies and equipment to keep it running smoothly. You will prepare and label boxes and shelves to hold business support supplies and equipment (see **Business Support Equipment** after the **In-and-Out Flow** section) for this purpose.

Note: You can derive many of the physical components of The System from regular household items, therefore saving you time and money. These physical elements can easily be set up in your home office, so your business can hit the floor running.

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What to Do First

The **first task** is to get all your file folders, boxes and shelves set up and labeled and to do the same for your digital filing structure and then start using The System right away (See **Appendices A** and **B** at the end of this document for the physical and digital filing structure of The System).

Setting up all the physical and digital components beforehand will allow you to easily understand the 'in-and-out' flow as we discuss its set up and use. We will go over how each of the filing components should look, including their **beginning**, **middle** and **end** structure and the logical in and out flow of the paperwork and digital files through The System from beginning to end, allowing for ultimate ease of use, consistency and business success.

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In-and-Out Flow (with Physical Structure)

Now, we will explain how your paper and digital files should flow through our Biz Organized in-and-out system. This is the **beginning**, **middle** and **end** phases for each business filing component.

We will go over each physical component, and the digital filing structure, using images as visual aids and taking you step by step through The System to allow for easy understanding. You can also use the In-and-Out Flow diagram (**Appendix C**) at the end of this document for reference. Let's start with your business **To Do's**.

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(To Do's) In-and-Out Flow

First, it is critical that you write down important business **To Do's** as you think of them, so they are not forgotten (you will thank yourself later!). **To Do's** are simply business tasks that you need to get done to start and maintain your business.

You must write down your business **To Do's** as you think of them. They can be done later but writing them down and storing them properly guarantees they won't be forgotten and will save you time and money.

At all times, keep a readily available piece of paper in the most conspicuous location, such as your dining room table or kitchen counter, so that each morning and throughout the day (and even night!) you can easily write down **To Do's** as they come to you.

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It's a good idea to use this same location for your grocery lists and lists for business items you'll need to purchase. When you are not at home, you will use any piece of readily available scratch paper, napkin, etc. or your smart phone note pad to write down business **To Do's.** Again, so they are not forgotten.

(To Do's) Beginning

Writing down your **To Do's** is the **beginning** phase. You can use any available piece of paper, or your smart phone, etc., to jot down business **To Do's**. Make sure you always label your **To Do's** with business name and current calendar date (as seen in the picture below) for consistency and recollection. After setting up your physical filing

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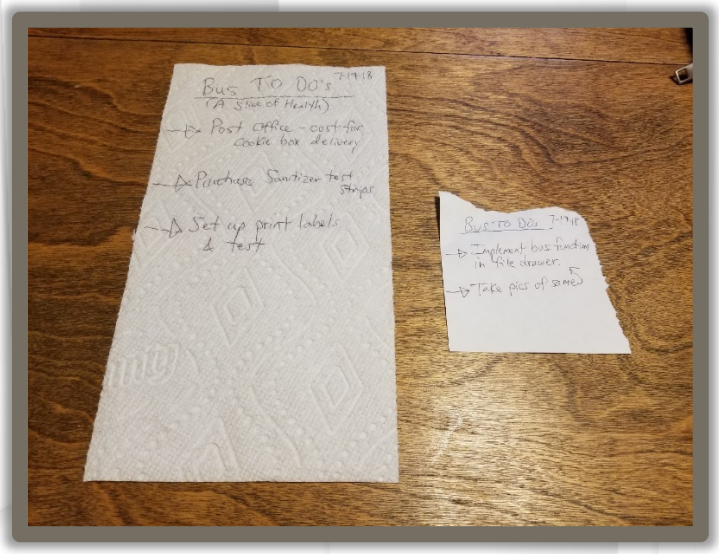
structure (file folders, filing cabinet, boxes and shelves), your **To Do's** will flow through The System with ease.

Note: It's up to you whether you keep a digital copy of your business **To Do's**. Since **To Do's** are usually business tasks that are written down 'on the fly' so to speak, we feel a digital copy for **To Do's** isn't necessary and that using the paper 'in-and-out' filing system only is adequate.

[Image] To Do's (using any type of paper):



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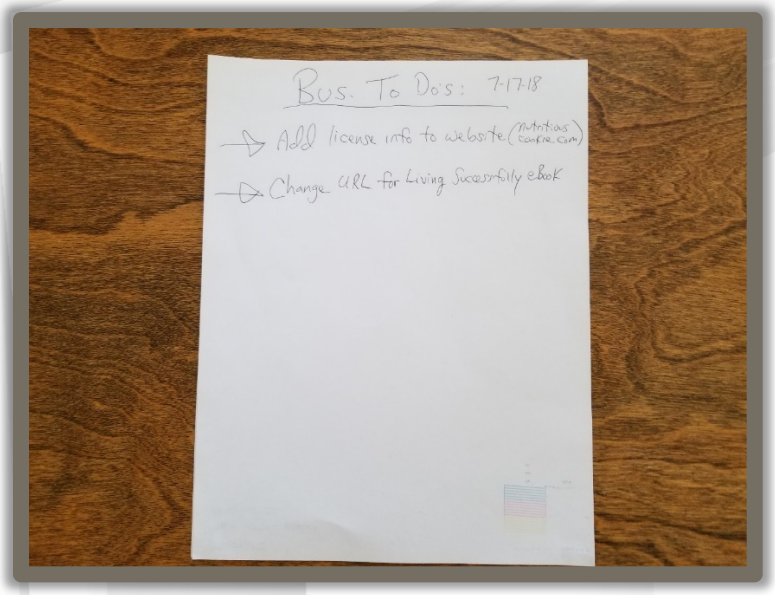
[Image] To Do's (using a standard paper):



Writing down **To Do's** can be done anytime day or night, but then they need to be sent through The System. You need to label a file folder (as seen below) and use it to store your unfinished **To Do's**. You will keep this file folder with you during the day (in a notebook - see notebook image further below) so you can remind yourself of the business tasks you need to accomplish.

You will also use this file folder to hold additional **To Do's** that you happen to think of and write down during the day (or night). At the end of your business day, you will take this file folder out of the notebook and place it on its designated cubed shelf. The notebook will be placed on its designated cubed shelf.

At the beginning of each business day, you will remove the **To Do's** file folder and notebook from their respective cubed shelves and place the file folder in the notebook to take with you to look at and complete **To Do's** as you have time. You will repeat this process each business day and night.

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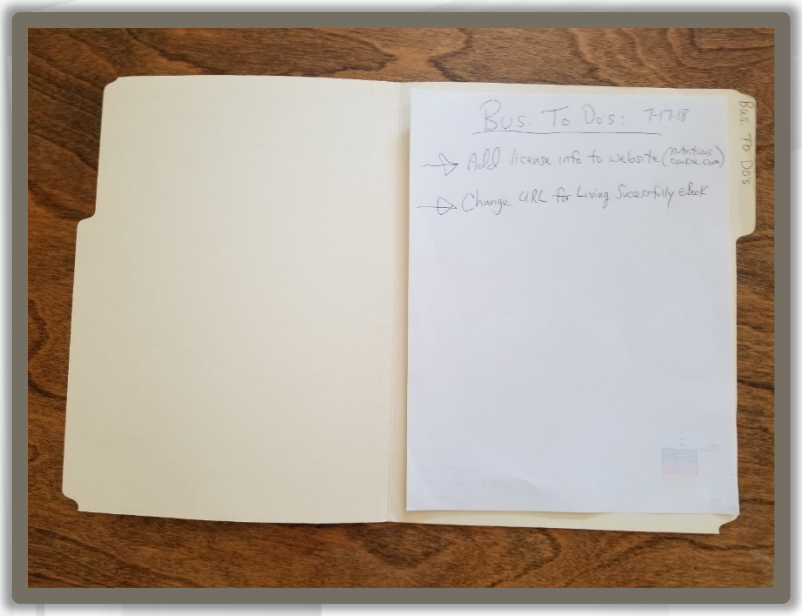
[Image] To Do's (in file folder):



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[Image] To Do's (in notebook):

[Image] To Do's (on cubed shelf):

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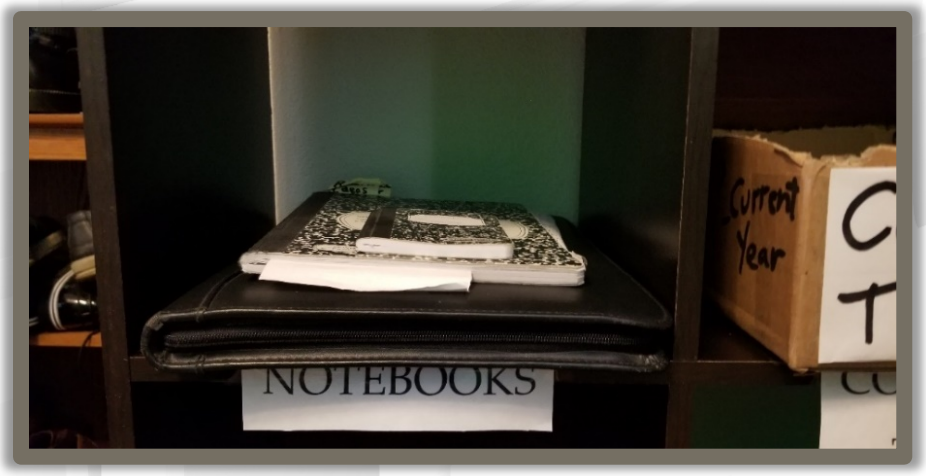
[Image] Notebook (on cubed shelf):



(To Do's) Middle

After writing down or typing out your **To Do's**, the next step is to complete them. The **middle** phase for your **To Do's** is simply getting them done. As you complete each **To Do**, you will draw a line through it to indicate it's been done.

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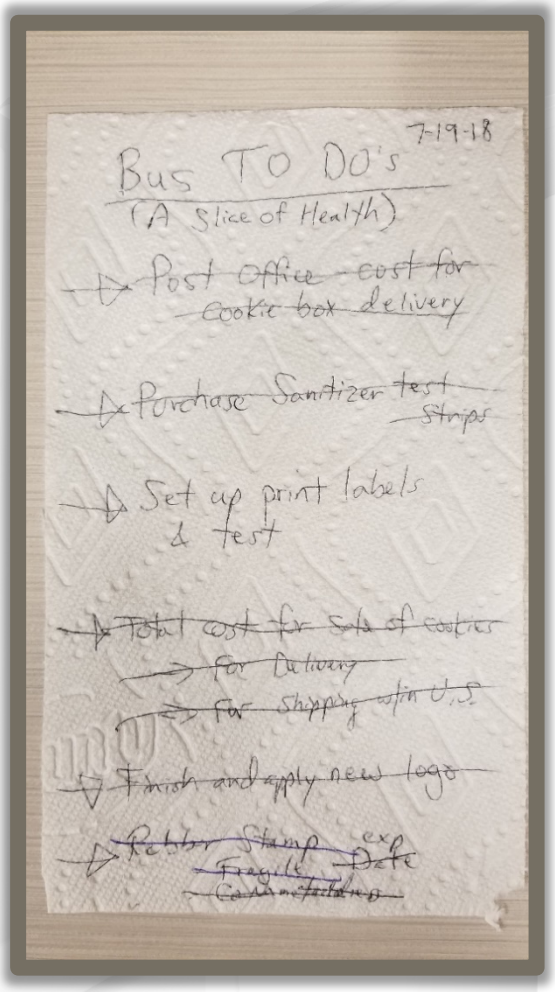
[Image] To Do's (crossed off as completed):



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For your business, you want everything to run as smoothly as possible. Therefore, for your business paperwork and digital filing system, it makes sense to always know where everything is located for quick and easy access. Cubed shelves are perfect for making this happen.

Cubed shelves are used for storing your **To Do's**, **Goals**, **Receipts**, **New Ideas**, **New Ideas Analysis**, **Start New Ideas** and any specific business **beginning**, **middle** and **end** paper file folders (real estate, for example) containing your notes and paperwork. The cubed shelves will also hold **note taking supplies** (including the zip up notebook), business **catalogs,** a **paper shredder** and **backup digital storage** devices.

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[Image] Cubed Shelves:

Continuing with the in-and-out flow, below is an image of one of the cubed shelves (very top left shelf) where you will place your business **To Do's** file folder at the end of each business day.

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[Image] To Do's on Cubed Shelf:

(To Do's) End

The **end** phase of your **To Do's** is simply placing the completed **To Do's** in the '**Completed To Do's**' box. Meaning, when you've crossed off every **To Do** on any one piece of paper, you can consider that **To Do** list complete and place it in your '**Completed To Do's** box.

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[Image] To Do's (Completed To Do's Box):

Before you can have any **To Do's** for your business, you should know what those **To Do's** are trying to accomplish. These are called your business '**Goals**'. Let's discuss **Goals** next.

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(Goals) In-and-Out Flow

You should always know what your business **Goals** are and write them down as a reference to remind yourself what it is you are trying to accomplish with your business. These need to be written down, placed in a labeled file folder and onto their appropriate cubed shelf.

(Goals) Beginning

The **beginning** phase of your **Goals** is simply writing them down. Unlike your **To Do's**, where you can use any type of paper that is available to write them down, your **Goals** should be written on a standard sheet of blank paper, such as print paper, so that when you write them down, they look neat and orderly. You should keep them in a labeled file folder on a designated cubed shelf.

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Note: It's up to you whether you keep a digital copy of your business **Goals**. We feel a digital copy for **Goals** isn't necessary and that using the paper 'in-and-out' filing system only is adequate.

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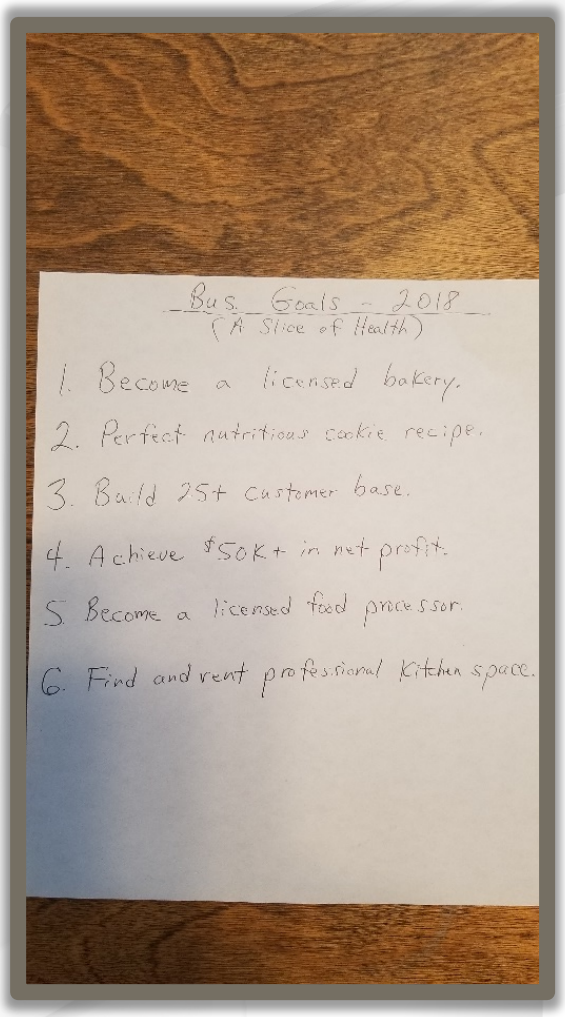
[Image] Goals Written Down:



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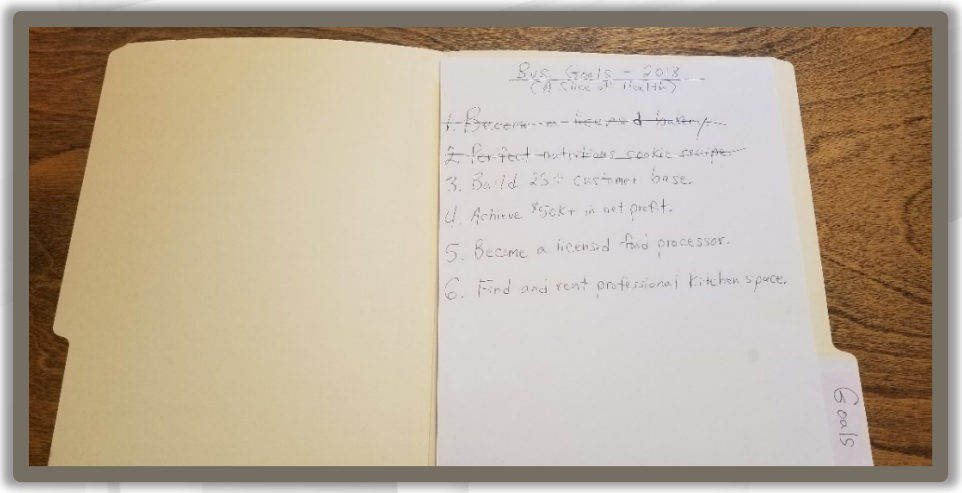
[Image] Goals in File Folder:



[Image] Goals on Cubed Shelf:

(Goals) Middle

The **middle** phase for your **Goals** is simply getting them done. As you accomplish each **Goal**, you will draw a line through it to indicate it's been done.

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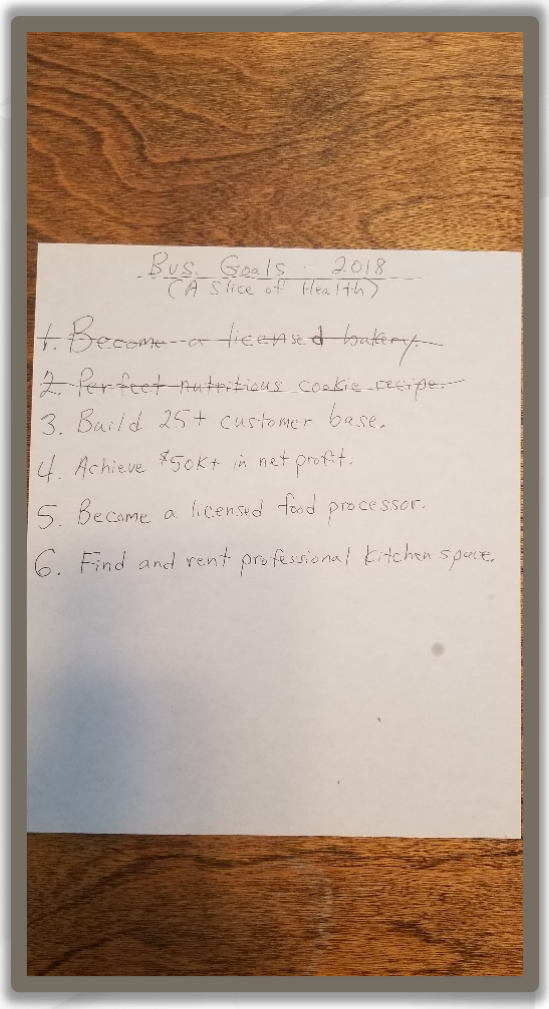
[Image] Goals (crossed off list):



(Goals) End

The **end** phase of your **Goals** is different than your **To Do's**. Since you won't have as many **Goals** as **To Do's** and most likely they will fit on one or two sheets of paper, you can simply leave them in the file folder stored on the cubed shelf. So, the **end** phase during the active year is leaving them in the file folder on the cubed shelf after they've all been crossed off the list and archiving them at the end of the year.

At year's end, as will be done each year, you will archive the completed **Goals** along with the rest of your business paperwork that is no longer needed for your active business. If you happen to come up with additional **Goals** during the same year, you can simply write them on a new blank sheet of paper and keep those in the same file folder on the same cubed shelf.

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As you're accomplishing your **To Do's** and **Goals** for your business, you will undoubtedly accumulate **Receipts** from all your business purchases. Your business **Receipts** also need to have their own special handling within The System.

(Receipts) In-and-Out Flow

You should keep all your business **Receipts**. Your online **Receipts** should go in their designated folder (see **Digital Filing Structure** further below). Your in-person **Receipts** should be kept in a labeled manila envelope and placed on a designated cubed shelf. When you fill up one envelope, create another and label appropriately.

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(Receipts) Beginning

The **beginning** phase for your business **Receipts** is when you purchase a business item and the clerk hands you the receipt. You will keep these in the appropriately labeled manila envelope and on the designated cubed shelf. Create new envelopes as necessary. You will archive these envelopes periodically (see **Receipts (End)** below).

Note: When you make online purchases, you will keep your **Receipts** in their designated digital folder which you will back up periodically along with all your other digital folders and files.

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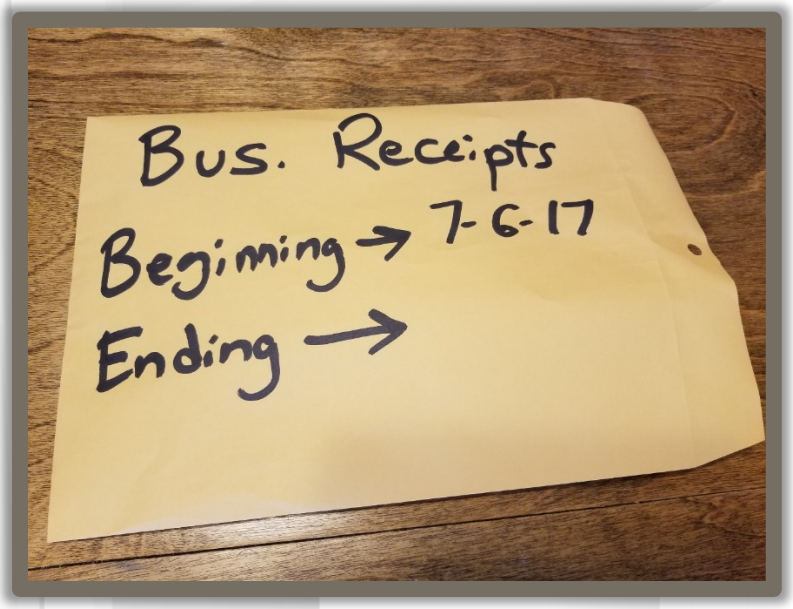
[Image] Receipts (From Business Purchases):

(Receipts) Middle

The **middle** phase for your business **Receipts** is simply the storing of them in the envelopes and on the cubed shelf. You may need to look at them from time to time so having them readily available on the cubed shelf for a while is

important for ease of access and the security of knowing you can return items if necessary.

[Image] Receipts (Labeled Envelope):



[Image] Receipts (Cubed Shelf):

(Receipts) End

The **end** phase of your **Receipts** is when you eventually archive them for tax and other potential reporting purposes. As the cubed shelf starts to fill up with envelopes, you will box up the older ones in archive boxes and place them on one of your archive shelves when the box is full.

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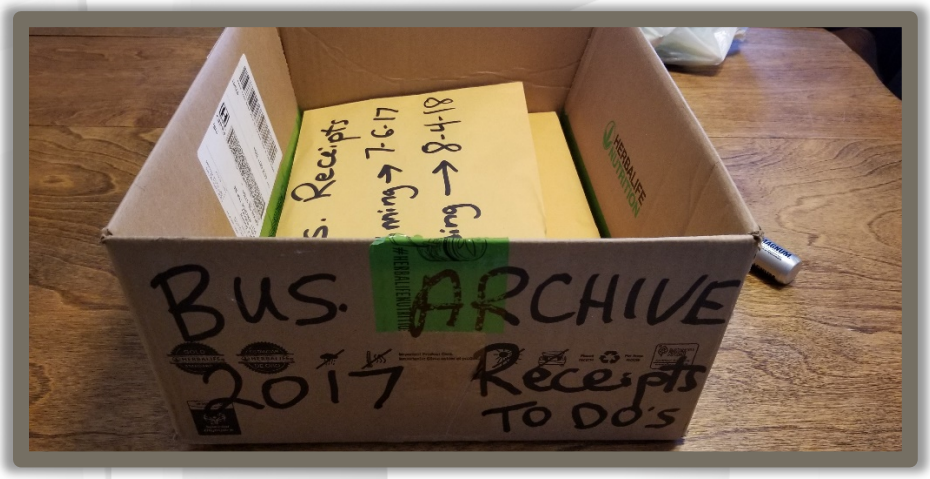
At year's end, you will box up any remaining receipt envelopes to be placed on the archived shelving along with all your other year end business paperwork.

[Image] Receipts (Archiving):



Now, let's discuss what you do when you have new business or product ideas. In business, **New Ideas** are periodically needed to keep up with new social trends or a changing business climate.

(New Ideas) In-and-Out Flow

New business and product ideas are crucial business components which merit having their own set of cubed shelves and digital folders. Writing down and tracking your new business and new product or product modification ideas is very important.

First, you don't want to forget these ideas. Keeping a record of them will help you remember. Secondly, you'll want to track their progress from beginning to end. These are written down, placed in labeled file folders and placed on their designated cubed shelves.

There are 3 cubed shelves associated with these **New Ideas**. The 3 shelves represent the **beginning**, **middle** and **end** phases of processing these **New Ideas**: The shelves and,

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thus, the folder names are: **New Ideas**, **New Ideas Analysis** and **Start New Ideas**.

[Image] New Ideas; New Ideas Analysis; Start New Ideas

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(New Ideas) Beginning

The **New Ideas** folders, one for Business and one for Product is used to hold the note taking papers that you've used to jot down your new ideas. This is the **beginning** phase of your new ideas. This **New Ideas** folder goes on the **New Ideas** cubed shelf (see images below). The same is true for the other two folders, **New Ideas Analysis** and **Start New Ideas**. They also go on their designated cubed shelves. If desired, you will create their corresponding digital folders as well (see **Digital Filing Structure** further below).

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[Image] New Ideas

(New Ideas Analysis) Middle

When you have time to start analyzing the new ideas to determine if they will be implemented into your business, the **middle** phase of new ideas is to move them from the **New Ideas** folder to the **New Ideas Analysis** folder, where

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it will hold all your notes related to the new business or product ideas while you are analyzing them.

[Image] New Ideas Analysis

Also, while you are analyzing the new business and/or product ideas, you will move any digital files that were stored in the **New Ideas** digital folder to the **New Ideas Analysis** digital folder.

(Start New Ideas) End

During the **end** phase of your new ideas, they will either get moved to the **Start New Ideas** folder (if you've decided to implement them) or get moved to the **Don't Start New Ideas** folder (if you've decided to not implement them). The **Start New Ideas** folder is located on the cubed shelf. The **Don't Start New Ideas** folder is in your filing cabinet, where it will stay until year's end when you archive the whole year's paperwork.

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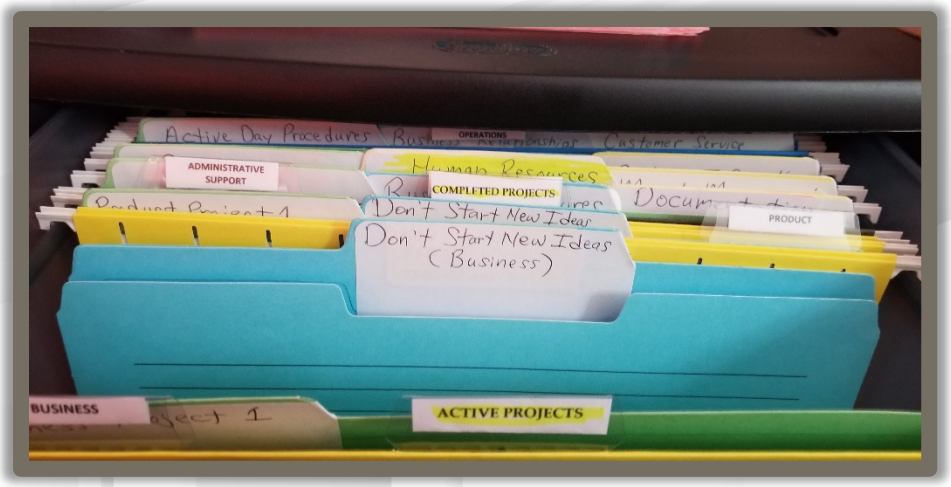
[Image] Don't Start New Ideas



If you've decided to implement the new ideas, the paperwork will be held in the **Start New Ideas** folder on the **Start New Ideas** cubed shelf until you have time to create and label **Projects** folder(s) located in your filing cabinet.

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[Image] Start New Ideas

If you've decided to implement your new business or product ideas, they automatically turn into new **Projects** as they flow through The System. Your new **Projects** folders are kept in your filing cabinet.

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(Projects) In-and-Out Flow

So, the **end** phase of your new business or product ideas, **Start New Ideas**, is also the **beginning** phase of new **Projects** stemming from your new ideas.

(Projects – Business or Product) Beginning

The **beginning** phase of your new **Projects** is simply to label a file folder appropriately (i.e. Business Project 1) and move the paperwork from the **Start New Ideas** file folder to this new file folder and place it in the **Active Projects** file folder hanger in your filing cabinet.

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[Image] Filing Cabinet

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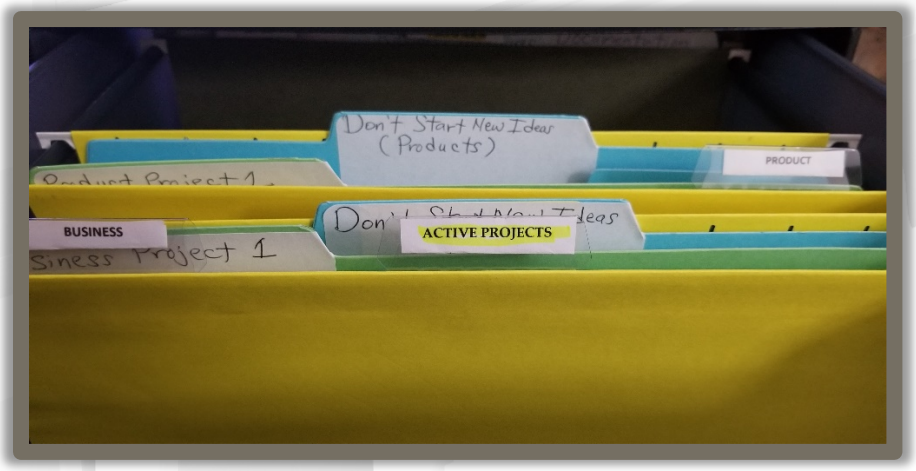
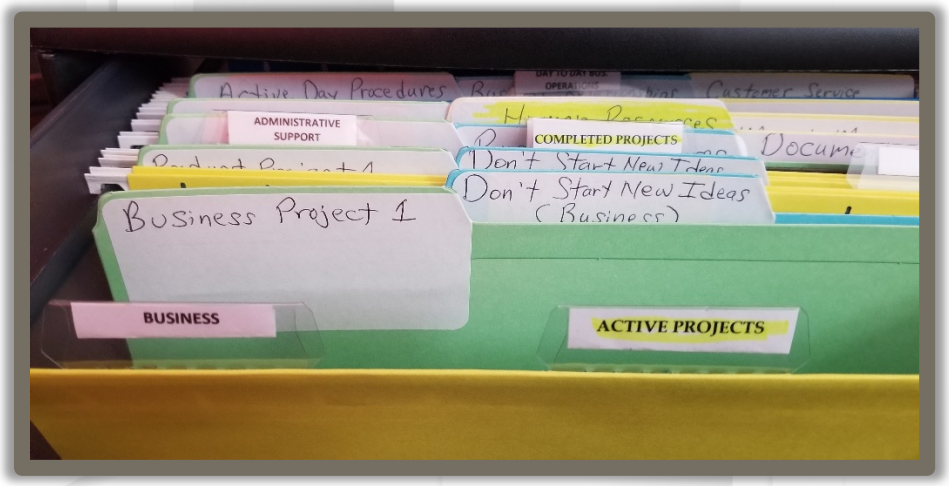
[Image] Active Project(s) Folder(s) Holder



[Image] Project Folder (Labeled)



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(Project – Business or Product) Middle

The **middle** phase of any new business or product **Project** is all the work you perform to complete the **Project**. While you're working on the **Project**, you can keep all the related paperwork in the **Project** folder until you complete the **Project**. The file folder and a copy of all the paperwork will be moved to the **Completed Projects** file folder hanger once the **Project** is complete.

(Project – Business or Product) End

When the **Project** is complete, you will take out all the paperwork from the file folder, make a copy of it, place the complete copy of the paperwork into the file folder and move it to the '**Completed Projects**' file folder hanger. The original project paperwork will become part of normal

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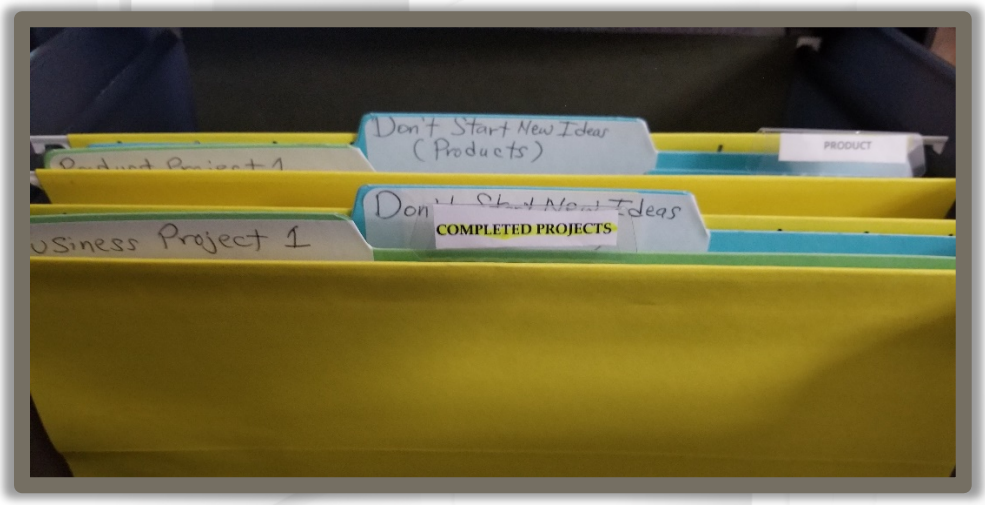
business operations and thus separated and moved into the various regular business file folders (**Receipts**, etc.) in your filing cabinet.

At year's end, you will archive the full (all-inclusive) copies of your completed project(s) paperwork, along with all your regular business paperwork.

[Image] Completed Project(s) Folder(s) Holder



(Business Example) In-and-Out Flow

Now, we'll give you an example of how the 'in-and-out' (**beginning**, **middle**, **end**) system model can be used for any business type.

Below is a specific business type (real estate) in-and-out flow example. It shows that the **beginning**, **middle** and **end** 'in-and-out' structure makes sense logically for any type of system, such as writing a paper.

The **Beginning** phase for real estate is finding the properties. The **Middle** phase is funding the properties. The **End** phase is farming the properties (selling or renting, etc.).

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[Image] Real Estate (Find, Fund, Farm)

Your business may receive **Catalogs** from suppliers or vendors which may be helpful to your business. You need to have an easy access storage location to keep and retrieve said **Catalogs**. One of your cubicle shelves should be used for such a purpose. As newer **Catalogs** from the same supplier come in, the old ones can be taken out of the box and recycled.

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[Image] Business Catalogs:

Every business should have at least two separate **Storage Devices**, as a backup, to save their business digital files (three would be better). Offline storage is used for business continuity and redundancy (so you always have a backup).

Offline storage simply means 'external' to the computer (flash drives, external hard drives, etc.) It's advisable that

you don't save your digital files to your computer's local hard drive (c: drive) unless you must. This is because often computers get hacked or crash for various reasons and then you lose all that saved data.

Make sure you save an exact copy of your business digital folders and files often to these backup **Storage Devices**. A good practice is to create folders on these backup **Storage Devices** named with the business and calendar dates of when you transferred the data to them (for example, 'My Business Backup 06.15.18'). Also, when not in use, keep these storage devices on one of your cubed shelves for easy access.

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[Image] Digital Back Up Storage:

(Filing System) In-and-Out Flow

The filing structure for both your paper and digital filing system will be virtually identical. The folders in the filing cabinet that are holding your business paperwork will be

labeled (named) the same as your digital folders for consistency and congruency.

This will allow you to easily find and file your business paperwork and digital files. It's up to you whether you keep a file in both places (physical folder and digital folder) or not.

You will use different colored file folder hangers for the **Projects** file folders and the 3 different business functions file folders (**Administrative Support**, **Day to Day Business Operations** and **Revenue Generation**). This will make it easier to find and pull out paperwork you need to look at.

For example, you can use yellow for the **Projects** file folders, green for the **Administrative Support** file folders, blue for the **Day to Day Business Operations** file folders and red for the **Revenue Generation** file folders.

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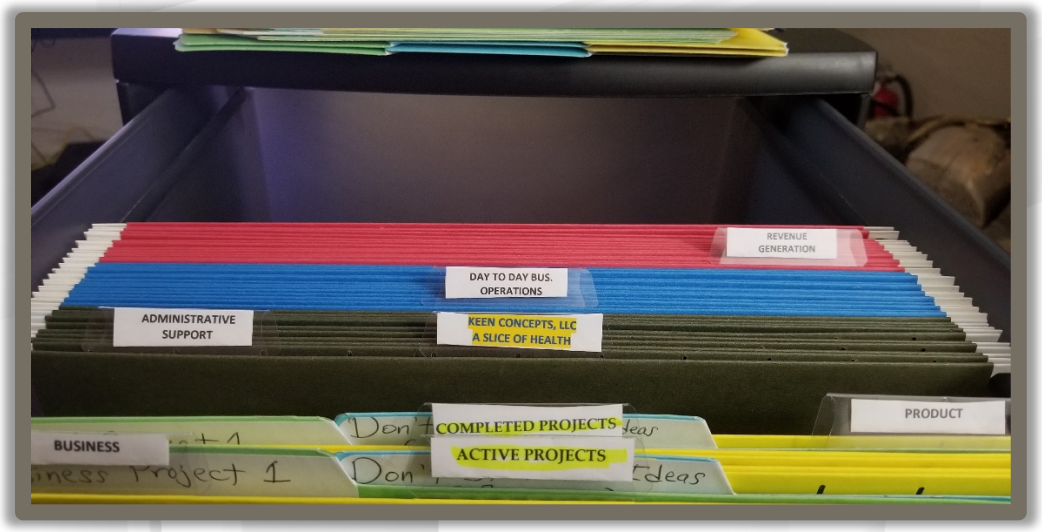
[Image] Filing Cabinet File Folder Hangers (multi-colored):



We also advise that you use different colored file folders within the file folder hangers to make them easier to find.

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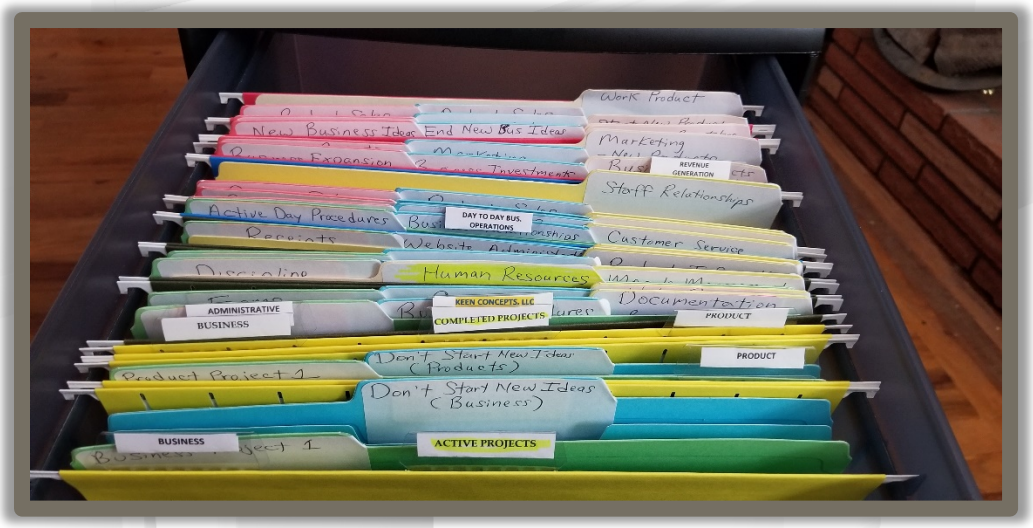
[Image] Filing Cabinet File Folders (multi-colored):



The in-and-out flow for all your business paperwork and digital files is simple:

(Filing System) Beginning – The **beginning** phase is simply when you create or acquire the paperwork or digital file. For example, say that you prepare an official document for promoting one of your employees. You would then

place it in the appropriate file folder (**Promotions**) in the filing cabinet.

(Filing System) Middle – The **middle** phase is the act of storing the paperwork or digital file in its folder during an active business year. For example, that same employee promotion document will be stored in its designated folder in the filing cabinet, in addition to its identical folder in your digital filing system if you so choose.

(Filing System) End – The **end** phase is the act of archiving your paperwork and digital files. Each year, at year's end, you will move all your inactive paperwork and digital files to their designated archive boxes (paperwork) and archive folders (digital). The archive boxes will be placed on the archive shelves and stored for a specified number of years. The archive folders will be backed up to offline storage.

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When setting up your business filing cabinet, you will have 4 main sections, each having a tabbed label and a different colored set of file folder hangers to hold their respective labeled multi-colored file folders (for all the subfolders).

Section 1. In the very front are the business and product **Active Projects** and **Completed Projects** file folder hangers.

Section 2. Next is **Administrative Support.**

Section 3. Then, **Day to Day Business Operations.**

Section 4. Finally, in the back is **Revenue Generation.**

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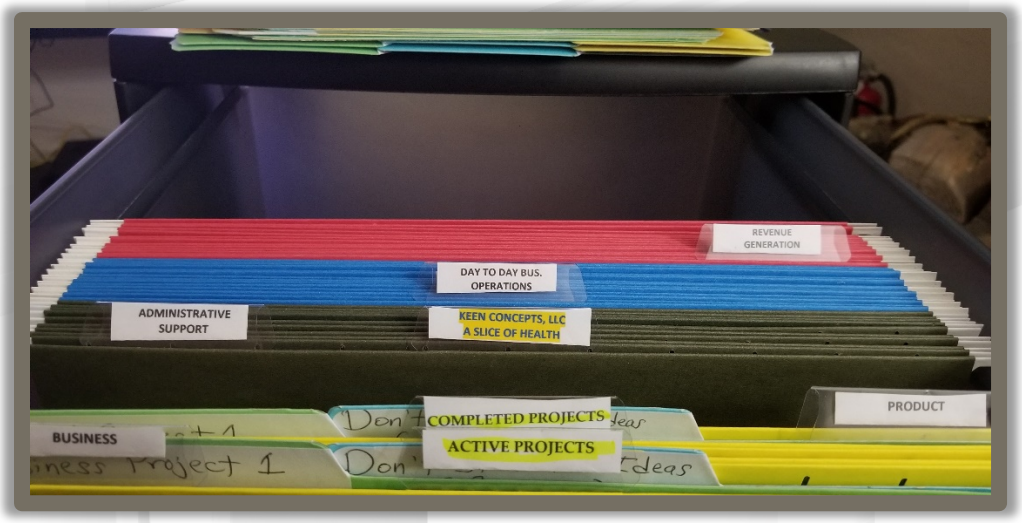
[Image] Paper Filing Structure (main sections Only):



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[Image] Paper Filing Structure (with all folders):

Using the digital filing structure folder names as a reference (see **Appendix B**), you should have already labeled your paper filing file folders and placed them inside their respective file folder hangers (i.e. **Active Projects**, **Completed Projects**, **Administrative Support**, **Day to Day Business Operations** and **Revenue Generation**).

According to the digital filing structure, you will have some folders that have several subfolders, like the **Human Resources** folder, which has the **Discipline**, **Hiring**, **Morale Management**, **Payroll**, **Procedures**, **Promotions**, **Reviews** and **Training** subfolders underneath it.

One way to set up this subfolder structure in the paper filing structure is to highlight the main folder (i.e. **Human Resources**) name on the folder label itself using a yellow highlighter pen (see picture below) and keep only the main folder (i.e. **Human Resources**) and its subfolders in the same file folder hanger.

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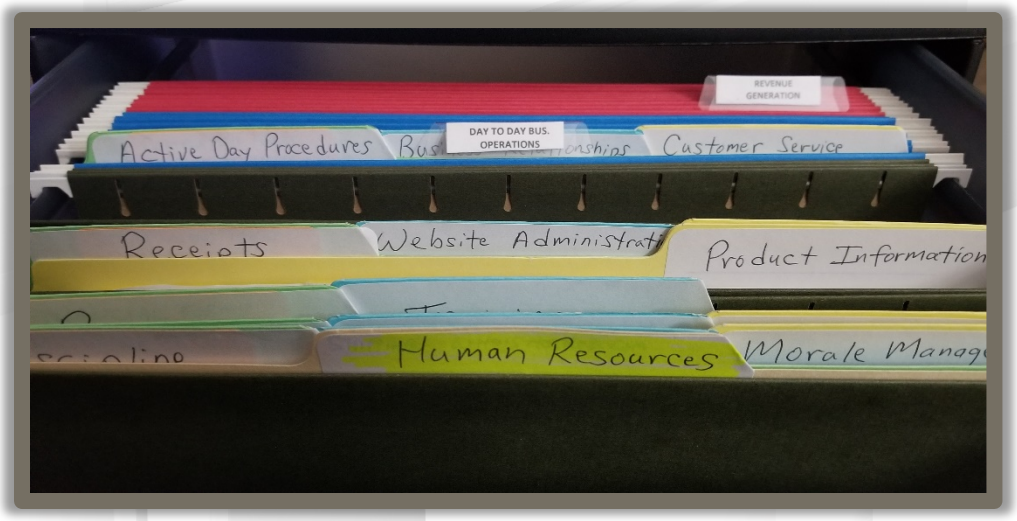
[Image] Paper Filing Structure (folder with subfolders):



Business Support Equipment

Your business, along with the in-and-out system, needs a support system for keeping everything humming along. You will set up labeled shelves and boxes to hold the

supplies and equipment needed specifically for this purpose.

Book Shelves

Book shelves are very handy for storing business material. Set up and use book shelves to store your business books, office supplies, shipping supplies and materials (if applicable) as well as storing your laptop, any monitors and printers.

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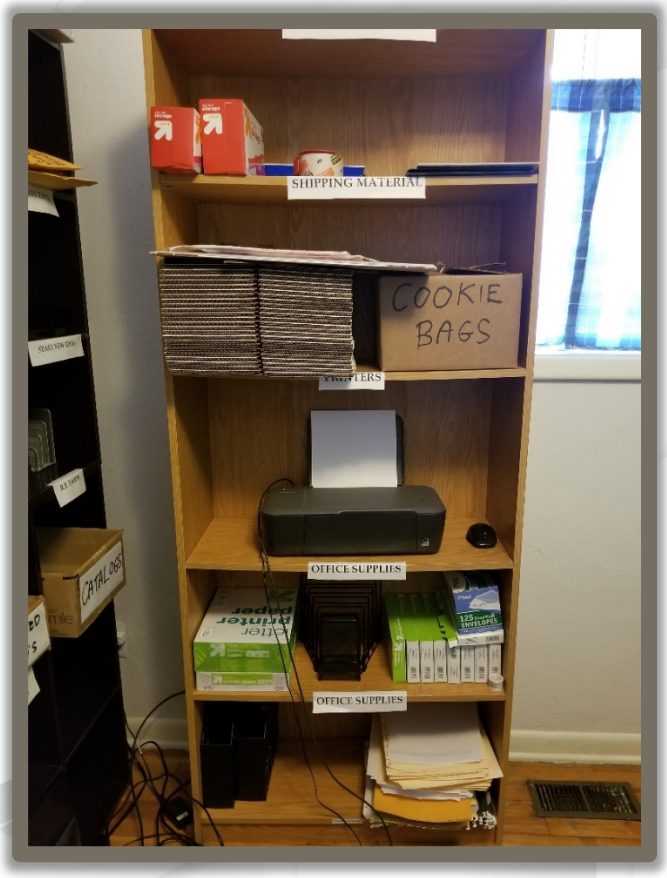
[Image] Book Shelves:



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Office Shelves

Additional 'office' shelves should be set up to store other business-related items, such as equipment used to support your business operations. You can use the shelving at the top of your office closet (if you have one) or build additional shelving along the wall of your office.

You need to logically and physically separate (in different boxes) the equipment you will be using for your business according to their application. For example, you should have separate boxes containing your electrical, video, phone, office and computer equipment, just to name a few. Prepare and label these (including any additional types of supplies or equipment) boxes accordingly and place them on your office shelves.

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[Image] Office Shelves:

Archive Shelves

Archive shelves are used for storing business paperwork and digital files no longer needed for active business operations, but necessary to meet legal requirements and those 'just in case' scenarios.

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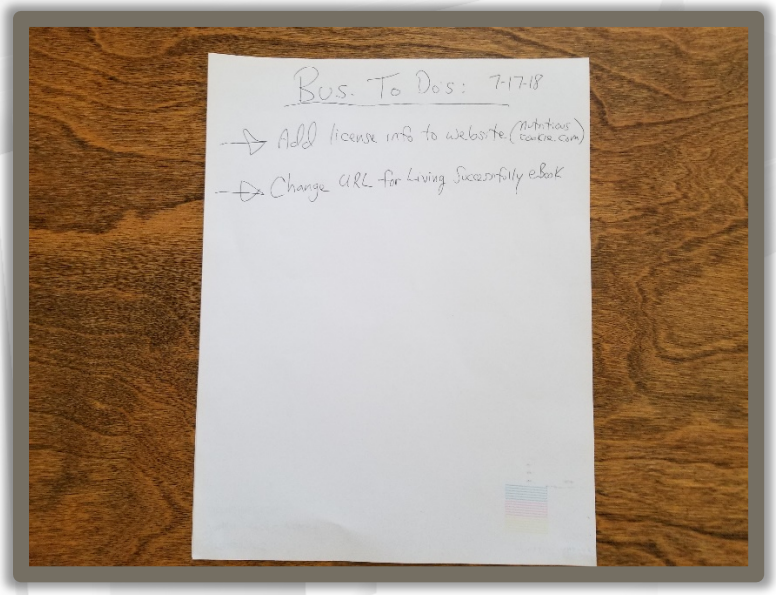
[Image] Archive Shelves:

Appendix A (Physical Structure)

The physical structure of the Biz Organized in-and-out system includes:

1. A designated and commonly used table or countertop area for keeping daily lists of your business **To Do's**.



2. A set of **Cubed Shelves** for holding and allowing easy access of certain business file folders, boxes, supplies and equipment.

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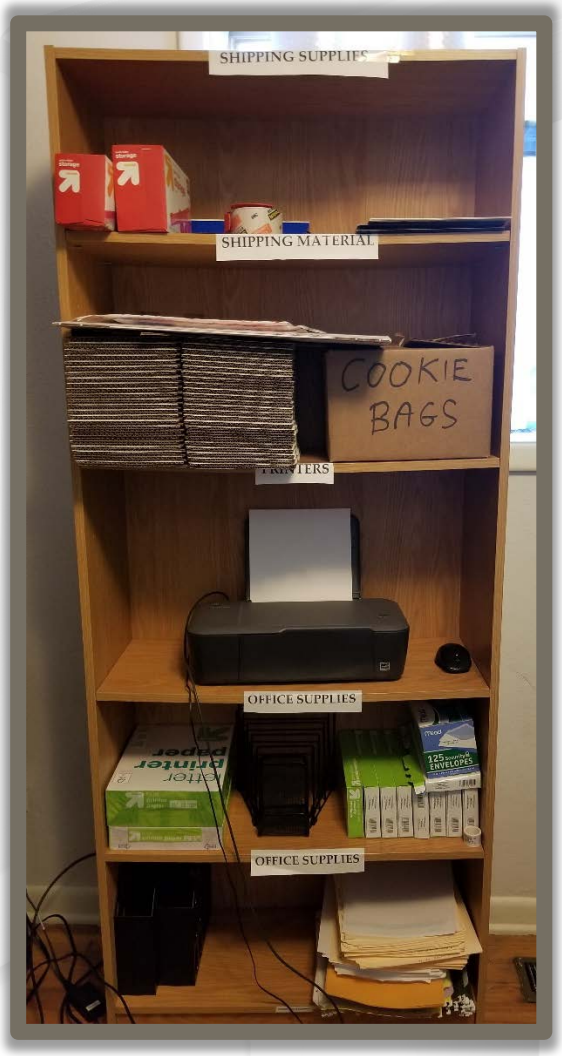
3. A set of **Book Shelves** for holding business books, office and shipping supplies, training materials, and printers, etc.



4. **Office Shelves** for holding supplies and equipment in support of the business.

5. **Archive Shelves** for holding and retaining inactive business paperwork for a certain number of years for tax and auditing purposes.

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6. A **Filing Cabinet** for holding all your active business support paperwork.

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7. Also included are **Multi-Colored File Folder Hangers**, **Multi-Colored File Folders, Boxes** and **Notebooks** for holding your business paperwork.

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Appendix B (Digital Filing Structure)

Below are images of how your digital file folder structure should be set up from top to bottom. This digital filing structure is based on the paper filing structure.

Very Top Folder: Business

Name	Date modified	Type	Size
BUSINESS	9/30/2016 5:43 AM	File folder	

Folders Just Beneath Business Folder (Archive, 'Business Name', New Ideas, Projects):

See image below. These are your 4 main folders that go just beneath your **Business** folder (which is the folder at the very top of the hierarchy).

Name	Date modified	Type	Size
ARCHIVE	7/12/2018 11:56 AM	File folder	
KEEN CONCEPTS LLC			
NEW IDEAS	7/12/2018 12:11 PM	File folder	
PROJECTS	8/8/2018 9:21 AM	File folder	

YOUR BUSINESS NAME HERE

Folders Just Beneath the 4 Main Top Folders (which are just under the Business folder):

See image below. It shows all the folders that go underneath the 4 main top folders, which are under the

very top **Business** folder. You will notice we have a folder named 'A Slice of Health', which is just below our main business name folder (Keen Concepts LLC). Keen Concepts, LLC is our main business name. 'A Slice of Health' is a dba (doing business as) business name for our domestic kitchen business, which, at the time this document was written, is a professional bakery business. The point is, if you have dba's, you will put those folders just below your main business name folder. Then, all the other folders go beneath the dba folders.

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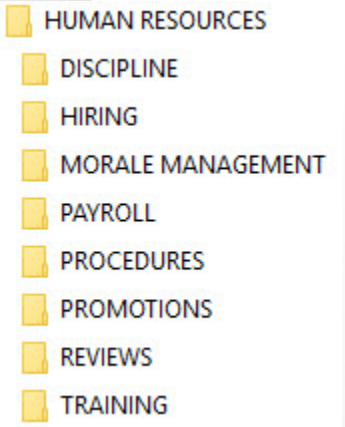
As you can see from the image above, the 3 main business functions, **Administrative Support**, **Day to Day Business Operations** and **Revenue Generation** go just below your business name or your dba name folder.

The image below shows folders we believe should go inside (underneath) the **Human Resources** folder (**Discipline**, **Hiring**, **Morale Management**, **Payroll**, **Procedures**, **Promotions**, **Reviews** and **Training**). You may come up with additional folders, but these will get you started.



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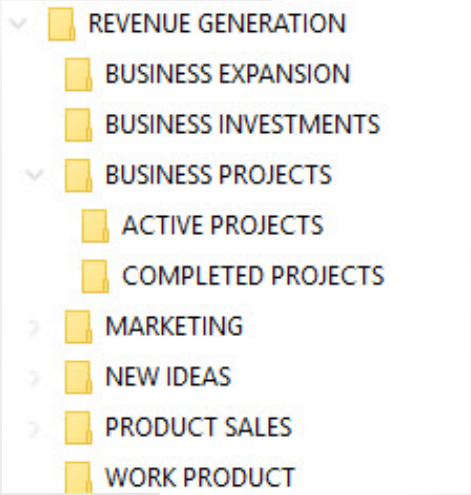
Below is an image that shows two folders we believe should go inside (underneath) the **Business Projects** folder (**Active Project** and **Completed Projects**). The **Business Projects** folder is underneath one of the 4 main folders (**Revenue Generation**).



When you decide to start a new business or product idea, that idea turns into a project. If the new idea, and thus the new project, is related to generating revenue for the business, then it should go in the **Active Projects** folder

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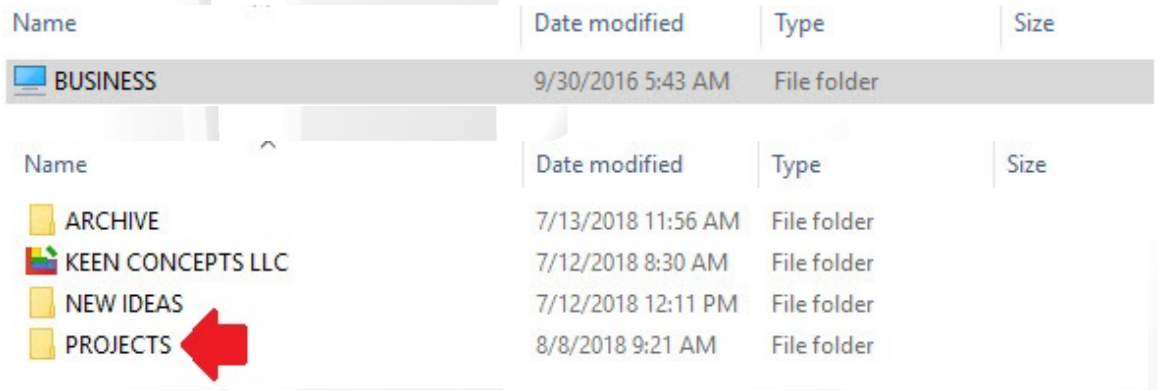
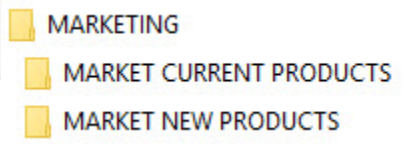
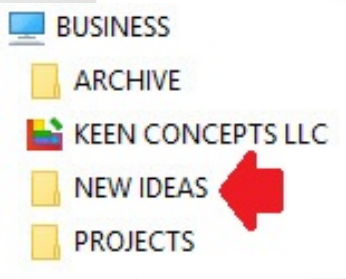
underneath the **Business Projects** folder (which is underneath the **Revenue Generation** folder). If it's not related to generating revenue, then we recommend you put it in the **Active Projects** folder underneath the **Projects** folder (which is one of the 4 main top folders under the very top **Business** folder). See image below.



A couple of folders we believe should be in (underneath) the **Marketing** folder are **Market Current Products** and **Market New Products**. See image below.



If you want to keep a digital copy of your **New Ideas** (**Business** and **Product**) in your digital filing system, then these will go either in the **New Ideas** folder underneath the **Revenue Generation** folder (if they are specifically related to generating revenue) or they will go in the **New Ideas** folder under the very top **Business** folder (this **New Ideas** folder is one of the 4 main top folders). The image just below displays the **New Ideas** folder as one of the top 4 main folders underneath the very top **Business** folder.



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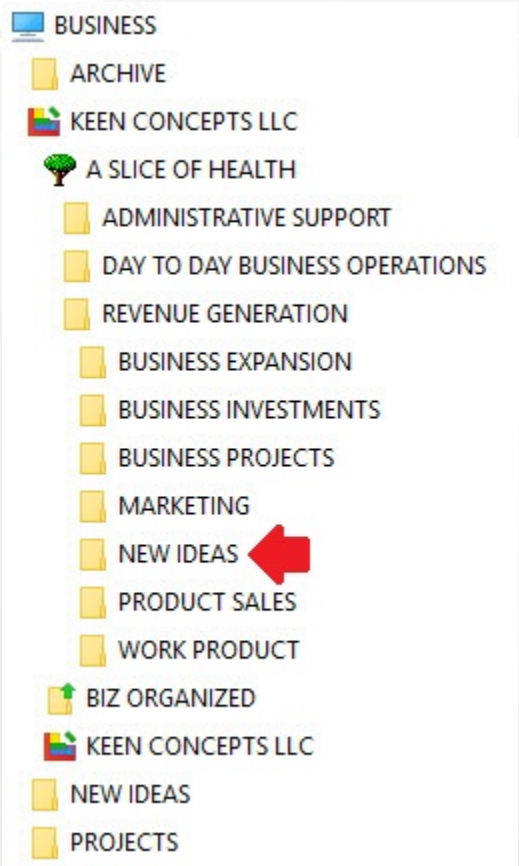
The image just below shows the **New Ideas** folder in (underneath) the **Revenue Generation** folder.



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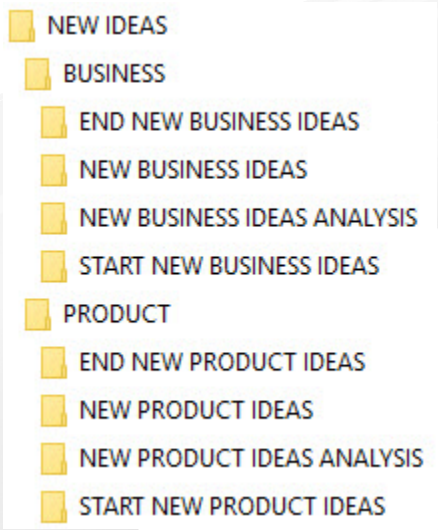
When expanded, they both should like this:



That's it. Just like the paper filing system, all your business digital files will be placed into their appropriate folders. We've discussed the overall digital filing structure, including the very top folder (**Business**), the 4 top folders (underneath the **Business** folder), the main business function folders and those that go underneath them.

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If you need to create additional folders for your business, use our structure as your base structure and add new folders as needed. Our structure is meant to cover the main business areas and give you a solid foundation from which to work.

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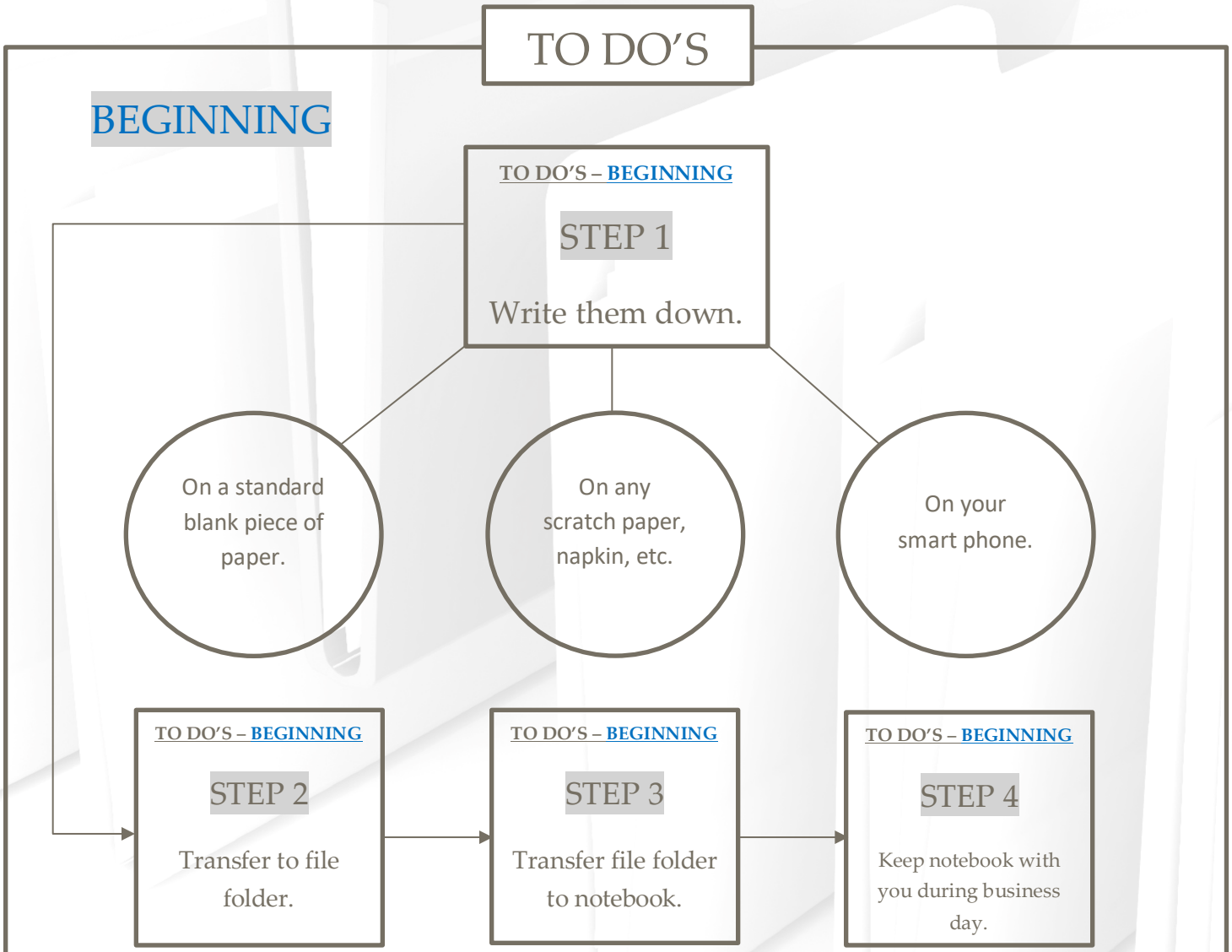
Appendix C (In-and-Out Flow Diagram) *Zoom in to See*



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MIDDLE

TO DO'S – MIDDLE

STEP 1

Complete TO DO's

TO DO'S – MIDDLE

STEP 2

Cross off list as you complete each TO DO.

TO DO'S – MIDDLE

STEP 3

At end of business day, take file folder out of notebook and place on cubed shelf.

TO DO'S – MIDDLE

STEP 4

Place notebook on cubed shelf.

END

TO DO'S – END

STEP 1

Place completed TO DO's in 'Completed TO DO's' box.

TO DO'S – END

STEP 2

Archive at year's end.

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GOALS

BEGINNING

GOALS – BEGINNING

STEP 1

Write them down.

→

GOALS – BEGINNING

STEP 2

Place in file folder.

→

GOALS – BEGINNING

STEP 3

Place on cubed shelf.

MIDDLE

GOALS – MIDDLE

STEP 1

Complete Goals.

→

GOALS – MIDDLE

STEP 2

Cross off as complete.

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END

GOALS – END

STEP 1

Leave Goals in file folder when complete.

GOALS – END

STEP 2

Archive at year's end.

RECEIPTS

BEGINNING

RECEIPTS – BEGINNING

STEP 1

Conduct business transaction – get receipt.

Online

- or -

In-Person

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MIDDLE

RECEIPTS – MIDDLE

STEP 1

Place in manila envelope.

↓

RECEIPTS – MIDDLE

STEP 2

Place manila envelope on cubed shelf to store.

END

RECEIPTS – END

STEP 1

Place full envelope in archive box.

↓

RECEIPTS – END

STEP 2

Place archive box on archive shelves.

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NEW IDEAS

BEGINNING

NEW IDEAS – BEGINNING

STEP 1

Write down notes about New Ideas. Label each page with New Idea name and current date.

If desired, do the same in your digital folders.

NEW IDEAS – BEGINNING

STEP 2

Place notes in file folder on cubed shelf.

MIDDLE

NEW IDEAS ANALYSIS – MIDDLE

STEP 1

When ready to analyze New Ideas, move paperwork to New Ideas Analysis file folder.

If desired, do the same in your digital folders.

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NEW IDEAS ANALYSIS – MIDDLE

STEP 2

Analyze the New Ideas for feasibility. Add any new supporting documents to file folder.

If desired, do the same in your digital folders.

END

START NEW IDEAS – END

STEP 1

If you decide to move forward with your New Ideas, move paperwork to the Start New Ideas folder (on cubed shelf). If not, move paperwork to the Don't Start New Ideas folder (in filing cabinet)

If desired, do the same in your digital folders.

START NEW IDEAS – END

STEP 2

Keep paperwork in Start New Ideas folder until you're ready to create and label a Project(s) folder for your New Idea(s)

If desired, do the same in your digital folders.

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PROJECTS

BEGINNING

PROJECTS – BEGINNING

STEP 1

Create a new file folder and label with a Project name (i.e. Project 1, etc.)

If desired, do the same in your digital folders.

PROJECTS – BEGINNING

STEP 2

Move paperwork from the Start New Ideas folder to the newly named Project folder and place in the Active Projects file folder hanger (in filing cabinet)

If desired, do the same in your digital folders.

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MIDDLE

PROJECTS – MIDDLE

STEP 1

Perform the tasks necessary to complete the project.

END

PROJECTS – END

STEP 1

When project is complete, take all paperwork out of file folder and make a copy of it.

PROJECTS – END

STEP 2

Place only the copy of paperwork back into the file folder.

PROJECTS – END

STEP 3

Separate original paperwork by business function and category.

PROJECTS – END

STEP 4

Place separated original paperwork into proper regular business file folders.

PROJECTS – END

STEP 5

At year's end, the Project paperwork will be archived along with all inactive paperwork.

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FILING SYSTEM

BEGINNING

FILING SYSTEM – BEGINNING

STEP 1

Creating or acquiring business paperwork and filing it.

MIDDLE

FILING SYSTEM – MIDDLE

STEP 1

Storing and retrieving (if necessary) your business paperwork.

END

FILING SYSTEM – END

STEP 1

Archiving your business paperwork at year's end.

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In Conclusion

We believe organization is vital to success in business and in life. We've come up with a solution to ensure paperwork and files don't get misplaced and, therefore, critical business appointments and tasks aren't overlooked. When we miss important meetings, misplace significant files or paperwork doesn't get completed in a timely matter, we are in jeopardy of losing business revenue, customers and growth.

Our Biz Organized 'in-and-out' business files and paperwork organization system should allow you to seamlessly track all your business files and paperwork from beginning to end. Anytime you perform any type of business transaction, the paperwork or files generated from that transaction will flow through The System with ease, so

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you can concentrate on important business goals instead of frantically searching for misplaced paperwork and files, thus allowing for better customer service and business growth.

We look forward to watching your business grow and succeed. Feel free to share your success stories on our business website at www.keenconceptsllc.com so others will be encouraged and motivated to do the same.

To Your Success!