1900: General

Section: Filing
Subject: General
Approved by: Rick Beard
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Policy Owner:

Policy

FILING

To maintain an orderly and efficient system for storing records of a Service Center, the following files are to be set up in a four-drawer file cabinet. These files are to be maintained daily and purged yearly. The purged files are then moved to a storage area and maintained in the same order. Dispose of according to P&P #1904, Guidelines for Retention of Files and Records.

Use Hanging File Rack & Hanging Files	Use Manila Files Inside Hanging Files
A/R Trail Balance Summary	
Account Record Changes	FIled in customer’s file
Accounts Trans. to Other Service Centers	
Adjustments	January-December: Lawn-Pest Prevention- Termite
Administration	General-Lawn-Pest Prevention-Termite
Applications-Active	

Use Hanging File Rack & Hanging Files	Use Manila Files Inside Hanging Files
Bad Debt - Lawn, Pest Prevention, & Termite	Original file sent to corporate. Dummy file made and filed by address in cancel drawer.
Benefits/Company	
Bids/Over $5,000	Lawn-Pest Prevention-Termite
Budgets	1-2-3 Trimester
Building Maintenance	
Business Licenses	From previous years, current year posted on bulletin board.
Business Card Orders	Hold until order filled and verified
Capital Expenditure Requests	Blanks and those awaiting filing
Cancelled Customer Files	Alpha street address, by type: lawn-pest prevention-termite
Certified Mail	Returned receipts-proof of mailing-file in customer file
Claims	General Information; Pest prevention-termite-vehicle-workman’s comp (put copy in customer file)
Collection Agency	
Complaint Logs	January-December: Lawn-pest prevention-termite

Use Hanging File Rack and Hanging Files with Title-Names Tabs	Use Manila Files Inside Hanging Files
Computer Logs	January-December Batch Sheets: Lawn-pest prevention-termite
Correspondence Corporate	
President	To-From ... Harvey L Massey
VP Operations - Landscape Services	To-From ... Rick Beard

Use Hanging File Rack and Hanging Files with Title-Names Tabs	Use Manila Files Inside Hanging Files
VP Operations - Consumer Services	To-From ... Tony Massey
VP Chief Financial Officer	To-From
Marketing	To-From
Region/Division Manager	To-From
Quality Assurance	To-From
Fleet & Assets	To-From
Training/Technical Directors	To-From
Purchasing	To-From
Payroll	To-From
To All Employees	To-From
Customer Correspondence	File in customer file
Customer Reference / Referral Letters	File in customer file
Daily Deposit Log	By month
Daily Production Summary & Report	January-December: Lawn-pest prevention-termite
Daily Sales Activity Report	January-December: Lawn-pest prevention-termite
Daily Operations Report	January-December: Lawn-pest prevention-termite
Employees-Active	One hanging file for each employee with manila folder inside
Equipment- Warranties, Instruction Pamphlets	Computer-Printer-Calculatoes-Telephone; Typewriters-Pest Prevention-Fume termite; Sub termite-misc.
Fleet-Fuel	January-December
Fleet-Inspection Reports	January-December

Use Hanging File Rack and Hanging Files with Title-Names Tabs	Use Manila Files Inside Hanging Files
Fleet-Vehicle, Repair and Maintenance Invoices, ARI Coupons	One folder for each vehicle
Florida/Georgia Dept. of DACS	Blank forms, Certified Pest Control; Operator-Blank forms, Special training WDO-blank forms, Renewal Applications-Completed forms, Renewal Applications-Blank forms, Application for Exams; (Completed forms in employee’s file)
Forms	Alpha Index-Blank Order-Orders Submitted
Insurance	Each Company i.e., Aetna, Hartford, etc.
Interservice Center Journal Vouchers	To-By Service Center; From-By Service Center
Inventory- Annual/Capital (Maintain three years)	
Inventory- M&S	January-December
Lawn/TS Files Contracts	
Lead Logs	January-December
Liens Placed	
Maps (All for territory)	
M&S Purchase Orders	Blank-RO & EPO-Suspense Order; (Not Received)-Orders Complete
Meetings, Training	January-December
Newspaper Ads	
Newspaper Articles	
Notary Public	
OSHA	
Pest Customer FIles (current)	

Use Hanging File Rack and Hanging Files with Title-Names Tabs	Use Manila Files Inside Hanging Files
Pre-employment - MVR	General information and verbal notes
Pre-employment - Workman’s Comp	General information and verbal notes
Pre-employment - Physicals	General information and verbal notes
Payroll (To include Recap, Incentive Summary, Incentive Worksheets, Lawn and Pest Prevention New Business Logs, Lawn and Pest Prevention Lost Business Log, and Termite Commission Log); Pest Prevention Start Logs;	January-December
Pest Prevention Start Logs	January-December
Pest Prevention Un-serviced List	January-December (by route)
Pictures/Photographs	
Price Increase	General Information; Lawn-Pest Prevention-Termite
Reference List	Commercial-Lawn-Pest Prevention; Sub Termite-Fume Sentricon
Sales Contest	Rules, Results, General Info
Sales-Home Shows	
Sales Appointment Log	January-December
Sales Completion and Backlog Report	January-December
Sales - New Account Log	January-December; Lawn-Pest Prevention-Termite
Sales Recap	January-December
Telephone Long Distance	January-December bills
Temporary Services	
Termite Customer Files (current)	
Termite Daily Production Report	January-December

Use Hanging File Rack and Hanging Files with Title-Names Tabs	Use Manila Files Inside Hanging Files
Termite 1-31 Schedule Log	January-December
Termite 1-31 Renewal Appointment Log	January-December
Termite Technician Timesheets	January-December (by man)
Training Files - Massey & Training Files - State Required (One hanging file for each active employee)	All individual training info, test copies, certificate copies, etc.
Training Meeting	Verifiable sign off sheets, agenda copies
Uniforms	Order Forms-information-uniforms ordered
Vacation	Yearly schedule for Service Center
WDO (1145) Completed Not Paid	January-December
WDO (1145) Completed and Paid	January-December

You might need to add additional files for your Service Center or delete others. For Example a Lawn Service Center would not need Pest Prevention or Termite Files.

Downloads

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