421: Termite Files, Updating and Purging – Computer Branches

400: Accounting · https://milo.masseyservices.com/docs/421-termite-files-updating-and-purging-computer-branches/

Section: Accounting
Subject: Termite Files, Updating and Purging - Computer Branches
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Policy Owner:

Policy

RUN ALPHA LIST BY MONTH, ON ACTIVE ACCOUNTS*

1. Check list to files one month at a time. (Make sure information is accurate).
2. Pull all files not on the list, set up by street address.
3. If there is a dummy file in the active files, put a (D) on the Alpha List in Red.
4. If there are no files in the Active File, and the name is on the list, put an (X) on the Alpha List in Red.
5. If the name is one the list twice:
    - Cancel one if same account
    - Make sure there are two folders if two types of service.

After checking each month, set up ALL files remaining in the branch (odd jobs, C.L.'s, etc.) and files in (B) above by street address.

Then check all (X's and D's) on the list by address (service and billing) to match to file set up by address.

If a file is found, put it into Active Files in the proper month and sequence, replacing Dummy Files when appropriate.

If files are not found, put a Dummy File in proper sequence and list it on the sheet in front of files in order to check with another branch or in order to check in canceled files.

File Clearance Letters and Odd Jobs by month in front of each file. (Keep for one year).

**(Do not run odd jobs, CL's or canceled accounts)*

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