

# 5 Simple Steps to Organising Your Business Documents



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# Introduction

Managing business documents doesn't have to feel like an uphill battle. If you've ever spent time searching for a single contract, sifting through emails, or untangling a web of mismatched folders, you're not alone. Juggling information across different platforms is a common challenge in every industry and size of business. But it doesn't have to be.

In this guide we'll show you how to simplify your document and data management in just a few steps. Whether you're looking to streamline your current system or future-proof your business as you grow, these practical tips will help you take control.

We understand how busy you are, and that time is often in short supply. That's why we've made this guide to the point and straightforward to follow. Focusing on practical steps you can take right away. No fluff, just simple and effective tips to help you get organised without taking up more of your day.

Still pushed for time? If you're still too busy to dive into the full guide, no problem. We've summarised the key points in five simple steps, so you can start making improvements in minutes.



*Owen, Damien & Jade*

1

## Bring everything together in one place

Bring all your documents, emails and files together in one place to ensure everyone has access to the latest version.

2

## Set up a simple, clear folder structure

A simple, clear folder system saves time and makes collaboration easier.

3

## Use clear and descriptive file names

Clear, consistent file names make searching faster.

4

## Use tags and metadata to make searching easier

Tag documents with keywords or add metadata.

5

## Automate where you can

Automate data extraction to avoid unnecessary data entry.

# step #1:

## The quick fix for document chaos is bringing everything together in one place

It's easy for documents and data to end up scattered, some in emails, others saved locally, and a handful floating in the cloud. Sound familiar? When files spread out like this, finding what you need can feel like searching for a needle in a haystack.

The simplest way to avoid this? Bring everything together in one place. Centralising your files, whether in a shared folder or on a cloud platform, makes it easier for you and your team to access the latest versions and stay on the same page. No more chasing down documents or wasting time opening multiple apps.

**Tip:** Start by choosing one system for all your files. Even a single shared folder can make a big difference. For a more advanced solution, consider a platform that combines documents, emails and data under one roof.

1

### Start by identifying key documents and data

Identify where your data is currently stored, such as emails, local drives, or various cloud services.

### Prioritise critical documents and data

What data does your team use regularly? Move those first into a central location.

2

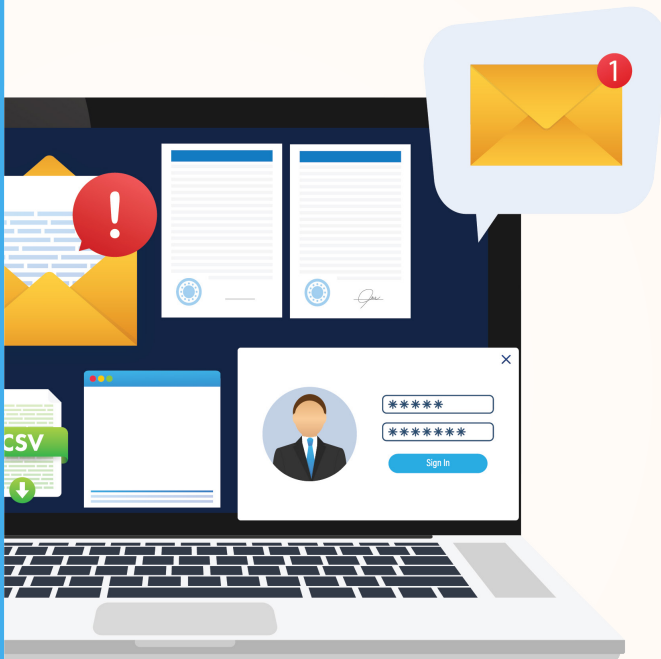
3

### Set clear guidelines for the future

Once you've established a system, set clear guidelines for how new files should be organised and stored.

Taking it step by step ensures the process is manageable and helps you avoid disrupting daily operations.

**Tip:** Involve your team early on. Get their input on what works best for their workflows and ensure everyone understands the new system. This will help with smoother adoption and ensure the centralised system meets everyone's needs.



# step #2:

## The key to staying organised is having a clear and simple structure to follow

Having all your documents in one place is a great start, but without a clear structure, things can still get messy fast. That's where a logical folder system comes in. A well organised folder structure makes it easy to find exactly what you're looking for, whether it's a client contract, a project report, or last month's invoices.

The best folder structures are simple and intuitive. Think about how your team works and design a system that reflects your business. For example, you could organise by client, project, or date. Whichever approach feels most natural for your workflows. The important thing

is to keep it consistent, so everyone knows where to find (and save) information.

**Tip:** Start by setting up a few main folders that reflect your core activities. From there, create subfolders as needed, but don't go overboard, less is more when it comes to staying organised.

### How to structure your folders

Here are a few tried and true ways to organise your documents:

1

#### By Client

Perfect if you manage multiple clients. Create subfolders for contracts, invoices, and project work.

2

#### By Project

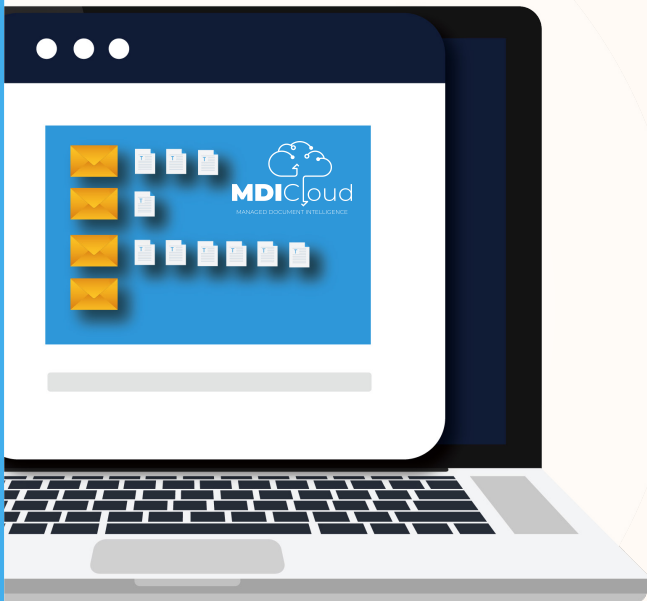
Ideal for tracking progress. Use subfolders for each project phase or milestone.

3

#### By Date

Great for time sensitive documents like reports. Sort them by month or year for quick reference.

**Tip:** Review your folder structure regularly to ensure it still meets your needs as your business evolves.



# step #3:

## Saying goodbye to "Document1" will remove headaches for you and your team

A well structured folder system is a great start, but without clear and consistent file names, you're still likely to waste time searching. Descriptive file names make it easy to understand what a document contains at a glance, without needing to open multiple files.

The key is to create a simple naming convention and stick to it. A good file name should tell you three things: what the document is, who it relates to (if applicable), and when it was created. For example a file name like "SmithCo\_Contract\_July2024" is far more helpful than "FinalVersion."

**Tip:** Use a consistent format that works for your team, such as [ClientName][DocumentType][Date]. This keeps your files organised and makes them easy to search for later.

### Naming conventions that work

Here are a few examples of naming conventions that can save time and reduce confusion:

**1 Client Files**  
"SmithCo\_Invoice\_Aug2024" or  
"JonesCo\_ProjectProposal\_Sept2023"

**2 Reports**  
"SalesReport\_Q1\_2024" or  
"MarketingSummary\_2023"

**3 Contracts**  
"AcmeLtd\_Contract\_Nov2024"

**Tip:** Avoid vague names like "Final," "Draft1," or "Document." These create confusion and slow down your workflow when you're searching for specific files.

Clear file names are a simple but powerful way to keep your documents organised and ensure your team can quickly find what they need.

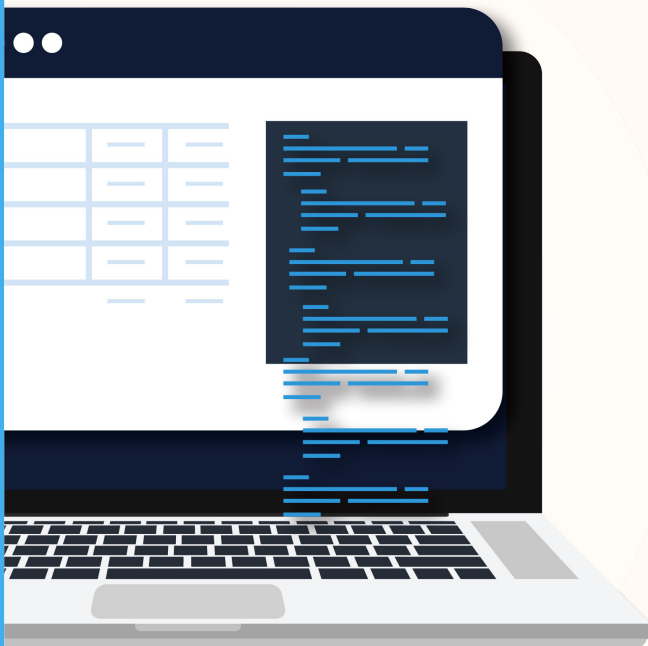


# step #4:

## You'll find what you need faster when you give your documents their own assistant

Even with a solid folder structure and clear file names, searching for specific documents can still take time. Especially when your document library grows. That's where tags and metadata come in. By adding relevant keywords or details to your files, you can make searching effortless. Think of it as giving each document its own personal assistant to help you find it quickly.

Tags and metadata allow you to search across all files based on key attributes like project names, document types, or even specific content within a file. This can drastically cut down the time spent digging through folders.



**Tip:** Start by tagging files with commonly used keywords such as client names, project types, or important dates. This will make searching across multiple categories much quicker.

### How to make the most of tags and metadata

Here are a few ways to use tags and metadata effectively:

1

#### By Client

Tag files with client names for easy retrieval across multiple projects.

2

#### By Project type

Use tags like "Invoice," "Contract," or "Report" to quickly filter similar documents.

3

#### By Date or Status

Metadata like creation dates or document statuses ("Draft" or "Approved") helps track progress and organise files by relevance.

**Tip:** Use a document management platform that supports custom metadata fields and keyword tagging for an even more powerful search experience.

By using tags and metadata, you can stop wasting time searching through endless folders and instead find exactly what you need in seconds.

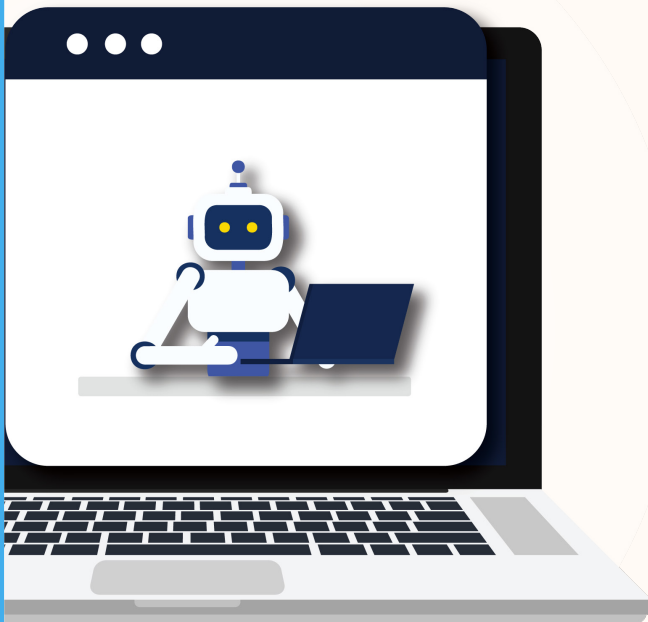
# step #5:

## Let automation take the routine tasks off your plate and get back to bigger priorities

Now that you've got your documents organised and easy to find, it's time to take things up a notch. Imagine if those routine, time consuming tasks like filing, data entry and pulling key details from reports could take care of themselves. That is where automation comes in.

By automating parts of your workflow, you'll free up time to focus on improving other processes, tackling bigger projects, or even taking a well earned tea break.

Think of it as the next step in optimising your workflow. You've laid the foundation; now let automation do the heavy lifting.



**Tip:** Start with small wins, like automating repetitive tasks, and gradually introduce more advanced features as you get comfortable.

### How automation can help

Here are a few examples of how automation can make your life easier, there are however infinite use cases:

1

#### File organisation

Automatically sort and file documents and data into the right folders based on their content, title or keywords.

2

#### Data extraction and matching

Pull and match key information from contracts, invoices, or forms without lifting a finger.

3

#### Document summarisation

Generate summaries of long reports instantly, giving you the highlights in seconds.

**Tip:** Platforms like MDI Cloud take automation to the next level, helping you save time and boost efficiency while keeping everything consistent.

By automating where you can, you'll not only save time but also create space to focus on what really matters. Whether that's improving other processes or finding new opportunities to grow.



# Meet the Authors



## **Damien Baker**

Damien is a seasoned business consultant with 20 years of experience in organisational efficiency, document management and IT.

He has successfully streamlined processes for companies of all sizes, leading to enhanced productivity and compliance. Damien's insights help businesses and organisations establish sustainable and scalable document and data management practices.



## **Owen Hammond**

Owen has over 17 years of extensive experience spanning Operations, IT, and Sales. As a leader in presales, he applies his expertise to develop innovative digital solutions tailored to businesses of all sizes.

Passionate about technology, Owen focuses on solving client challenges, enabling businesses to embrace growth through seamless transitions to digital practices.



## **Jade Miles**

With over 15 years of experience in the data, technology, and information management industries, Jade has developed a reputation for driving impactful product strategies and promoting industry advancements.

Passionate about helping organisations streamline their document and data management processes, Jade focuses on enabling businesses to unlock the full potential of their information.

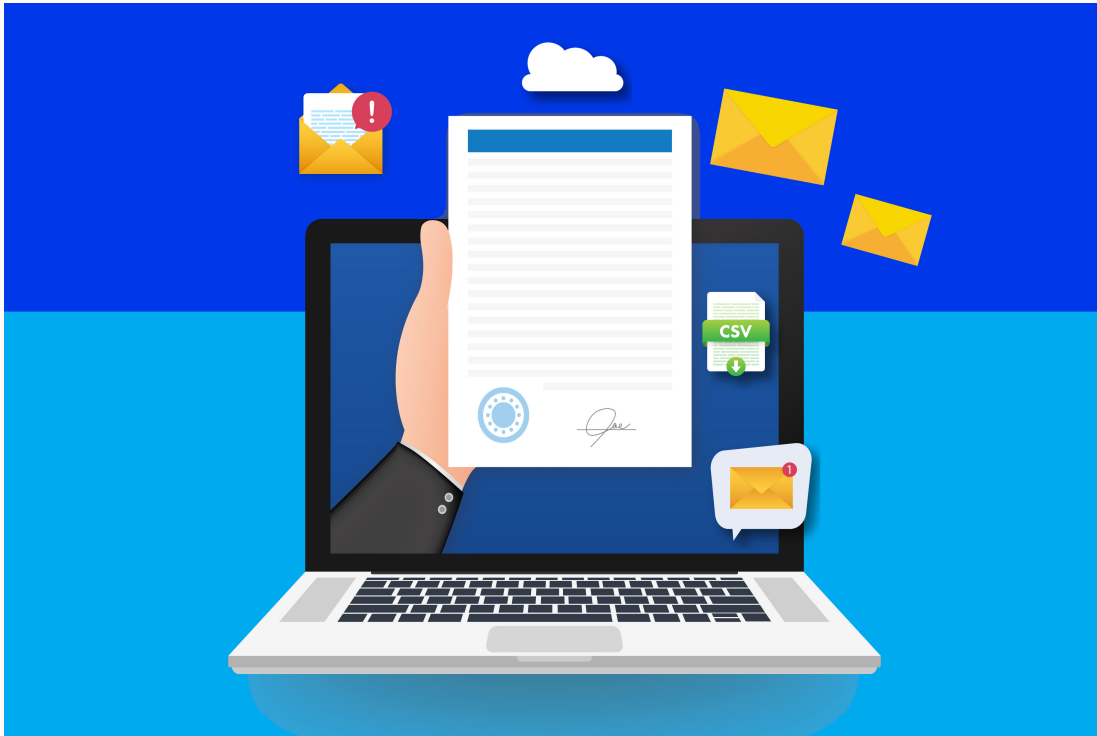


# MDI Cloud

MANAGED DOCUMENT INTELLIGENCE

## How MDI Cloud can help you





MDI Cloud is a cloud-based platform that brings all your documents, files, emails, and data into one place. With powerful global search and intelligent automation, you can find what you need in seconds, summarise long reports instantly, and streamline repetitive tasks.

Designed to grow with your business, MDI Cloud offers unlimited users as standard. So your entire team can benefit without worrying about additional costs.

Whether you're a small business or a growing enterprise, everyone can access the platform to streamline workflows and collaborate seamlessly. Plus, with dedicated annual support, you'll have expert assistance on hand throughout the year to ensure everything runs smoothly and your team gets the most out of MDI Cloud.

1

### Centralised access

One platform for all your documents and data. Connecting existing systems where needed to fill gaps in necessary functions.

2

### Global search

Quickly search across all your content, including document text, titles, metadata, and even within email, without switching between applications.

3

### Workflow automation

Streamline repetitive processes like approvals, data entry, and file organisation, helping your team work more efficiently.

4

### Intelligent document processing

Extract, analyse, and summarise complex data from documents or emails with ease, saving time and improving accuracy.

## How data discovery enhanced GWCT's wildlife and habitat management

### Client

Game & Wildlife Conservation Trust (GWCT)

### Industry

Environmental Conservation

### Challenge

GWCT faced difficulties managing extensive paper-based archives, including weather reports and research publications, which hindered efficient data analysis and conservation efforts.

### Solution

Storetec digitised GWCT's archives and implemented MDI Cloud, integrating AI tools to streamline data analysis and reporting.

### Results

The digitisation and AI integration enabled GWCT to access critical information swiftly, enhancing research capabilities and informing conservation strategies.

### Testimonial

"We are incredibly grateful for the exceptional service provided by Storetec. Their professionalism and dedication to quality made our document discovery project a success.

With the assistance of MDI Cloud's AI assistant, we have been able to transform our research capabilities and make significant strides in our conservation efforts."

Kitty Benson, Facilities Assistant



**Contact us for  
expert advice and  
tailored solutions**



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