

20 Paperless Office Secrets

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1. Save files by client, customer, vendor, business function. Don't save files by program. For example, let's say your business prepares correspondence to customer Jane Smith and to vendor ACME Office Supply. Microsoft Word will prompt you to save those two letters in the very same directory. Don't do that. It doesn't make sense. Since you now have a paperless filing system, save correspondence to Jane Smith to directory *file room\customers\smith, jane*, and store the letter to ACME Office Supply to *file room\vendors\acme office supply*.
2. Saving information to a PDF file instead of to paper will always save you money. Do NOT print out a report and scan it later to create a PDF file.
3. When you start your paperless system, think twice about scanning all your old documents. Most of your old documents will be destroyed over time. Consider only scanning "permanent file" documents and new documents. If the cost of storage is very high, consider scanning old documents. Scan the most newest documents first.
4. After scanning documents, do not destroy the paper copies until you have several generations of backups.
5. If only one system that changes frequently, for example, your billing system, backup that system to another hard disk on another computer each time that system changes. Backup all files every week. Thus, you don't have the aggravation of daily backups, and your systems that changes frequently, your billing system, is backed up every time it changes.
6. Passwords are a real problem. You should use a different password for each system or Web site that you need to log onto. You should create passwords that can't easily be guessed. You should not write down your passwords. THIS IS ONE BIG MESS! If you need 20 different passwords, how is a normal person going to remember them without writing them down?

Solution: Use a universal prefix and suffix, and change a number between the prefix and suffix. For example, use #DFG967zxc for AOL and use

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#DFG894zxc for Hotmail. In your Rolodex or PDA, put 967 for AOL and 894 for Hotmail. You only have to remember #DFG__zxc once.

7. What part of your records should you convert first to paperless? Look at all or part of your accounting system as a possibility. Bank statements and other such paper documents can be scanned, and the accounting software can generate PDF files instead of paper reports.
8. Upgrade or install one system at a time. Don't add or upgrade more than one program per week. If strange things happen to your system, you are more likely to isolate the problem if you make one change at a time.
9. When you need to replace one computer with another, copy the entire hard drive of the old computer to the new computer. Put the old computer's folders and files in a folder named \OLD on the new computer. This is great for saving data and configuration information. In most cases, the new computer's hard disk will be so big, relative to the old computer's hard disk, that you will still have loads of room left on the new computer's hard disk. Using this technique, (1) you don't have to keep the old computer "in case you need something" and (2) you won't say, "That file was on the old computer, but it is gone now (oops)." When you do backups of the new computer, exclude \OLD.
10. Take advantage of Windows Desktop shortcuts. (In "[How To Setup A Paperless Office](#)", you will find out how to create shortcuts in seconds.) If you are accessing the accounting files frequently on one day, place a Windows Explorer shortcut for the accounting folder on the desktop. If a desktop shortcut isn't going to be used for a long time, delete the shortcut.
11. When you are done using the Acrobat, do not exit out of the program. Minimize Acrobat instead. You will notice that you will be using Acrobat more and more each day. Maximizing a minimized program takes much less time than starting a program that has been closed.
12. If you have a large document, count the number of pages. Make sure that the scanner scans the same number of pages. This is a good quality control procedure.
13. When you are done with your procedures manual, use Acrobat to turn the manual into a PDF file! That beats having another binder near your desk. In addition to that, it is searchable. To make it easy to access, put it on the Windows Desktop.
14. Keep the scanner and shredder in different locations. If a shredder is close to a scanner, it is all too easy to shred something that was supposed to be scanned!

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15. It is easy to forget whether someone has scanned a document. We recommend putting a tickmark, if possible, on originals to indicate that a document has been scanned. If the original should not even be modified by a tickmark, put a tickmark on a sticky note, and attach the sticky note to the original. This procedure reduces the chances of scanning the same document twice.
16. Don't make your file retention system hard to work with. For example, records for tax returns should be kept six years from the filing date, including extension. Thus, you could end up with 04-15-2009, 08-15-2009 and 10-15-2009 as file retention dates for files associated with 2002 individual tax returns. Rather than having paperless documents for 2002 tax return files with deletion dates of 04-15-2009, 08-15-2009 and 10-15-2009, simplify matters and just use 10-15-2009. [Consider using File Butler to remove old files.](#)
17. It is my experience that it is faster to scan and read together, rather than as two separate functions. ("Read" is the OCR software step to make a digital document searchable.)
18. If you will be scanning, a lot of documents, minimize your OCR software, such as FineReader or OmniPage, instead of exiting. This will reduce the time you spend waiting for the computer.
19. Scanning is probably even slower than filing with current paper based system. The only reason to scan is to have faster document retrieval and save on storage.
20. Do you have any employees that have no business filing? They have an assistant or secretary that does or should file everything for them. If they didn't file before going paperless, they shouldn't file after going paperless. Technology is not an excuse to stop delegating work.
21. We only promised 20 secrets! This is a bonus. You will make an investment in time, software and hardware to go paperless. That investment will pay for itself quickly. For a fraction on that investment, we can help that process run smoothly. Our ["How To Setup A Paperless Office"](#) (\$89) will help you make the leap from a traditional office to a paperless office. [The Denver Tax Paperless Office \(News\) Letter](#) (\$89) will show you how to make the most of your paperless office as technology changes. Start or tuneup your paperless office today!

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