

APPLIED INDEXING

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Applied Indexing by Amberg

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THE FILING DEPARTMENT of a business is often called its *Intelligence Department*.

Have you an intelligence department in your business? Are the original records of your transactions ordered in such a way that you can at any moment trace a transaction to its source, place responsibility for every action or use of judgment, whether it happened yesterday or a year ago? That is what the proper filing method in your business should enable you to do.

To illustrate how the conduct of a business centers upon its original records: Suppose you are a hardware manufacturer. A former customer requests quotations on cabinet drawer handles, "No. 2785, same as my last order." Your correspondent looks at your price list, sees that No. 2785 handles

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regular are \$1.45 per dozen, and writes quoting that price. The customer responds with an order. When his former order is looked up, it is found that he previously bought No. 2785 handles in *special brush* brass finish, at \$2.15 per dozen. He is written an apology and quoted the right price. He may buy the goods. But if he has had other quotations, the chances favor his buying elsewhere and becoming some other hardware manufacturer's customer.

Do you ask what filing has to do with this?

Proper and prompt access to all this customer's previous correspondence and enforced reference to it would have made your correspondent base his letter on *facts* and not on memory or guesswork. You would have been saved time, postage, temper and, probably, a customer.

Where filing and finding is slow and inaccurate, files will frequently contain as many complaints as orders; and the correspondence of that business will largely be dictated from memory, owing to the time and trouble required to get at previous cor-

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respondence. Where the file service is good, fewer complaints and quicker closing of sales is a noticeable feature of the business. Definiteness of information means much to your prospective customers and can come only from dictating from facts.

An illustration of the far reaching effects of slipshod filing is shown by the following incident. A New York advertising agency received in June a telegram from a Philadelphia client requesting one of its representatives to secure a certain Blue Book and arrive in Philadelphia that day. The request was complied with. In November they received another telegram suspiciously like the first. On telephoning Philadelphia they learned that the supposed sender of the wire knew nothing of it. Investigation showed that *failure to file* the long-hand draft of the telegram written in June—five months before—had permitted it to get into some active correspondence, causing it to be treated as alive and acted upon.

Thousands of such instances are occurring daily in all kinds of businesses and, despite the cost, confusion and trouble caused, it

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seldom occurs to those concerned that inadequate methods of caring for original records create the confusion. Individuals are reprimanded for seeming personal negligence, when lack of order in the business itself is to blame.

Let it be said here that the one purpose for which this book is *not* intended, is to sell you any so-called *system* of filing. There is no system of filing in the generally accepted sense. There are filing *methods*, which, when properly applied to the various departments of a business and arranged in the proper combination the business demands, will give order to its conduct.

Because of the misuse of the word "system" in connection with office organization, we will avoid the term *filing system* and speak of all combinations of filing methods as the *filing plan*.

What is a Filing Plan?

ORDER is heaven's first law and a first law of business. But there is no universal panacea for a disorganized organization any

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more than there is a cure-all among medicines.

Ten years ago it was generally accepted as a fact that there was some ready-made scheme somewhere that would make any business self-recording, everything in fact but automatic. That businesses are essentially different and reflect the individualities of their builders and executives, was ignored. For several years, system for system's sake ran away with many organizations. Your ideas, your habits, the customs that have grown up in your business must absolutely dictate the plan of keeping track of its transactions. The filing plan can maintain order only to the extent that it fits the *business plan*.

Intelligent analysis of how your purchasing, manufacturing, sales and other departments coördinate reveals to the experienced filing man the different principles of filing required in your particular instance. And the way he combines these principles constitutes the filing plan.

The essentials of such a plan are: First, it must be a *finding* plan; it must not only