

Sample Cabinets - Business

For a video on how to create a cabinet, please click [here](#).

For a document on how to create a cabinet, please click [here](#).

For a video guide on the different field types, please click [here](#).

Here are a few sample cabinet ideas to look at for business use...

Remember these are only suggestions to get you thinking what would work for your company. All cabinets are customisable for your needs. Note that not all fields have to be completed when indexing a document, only complete fields relevant to the particular document.

Clients Cabinet

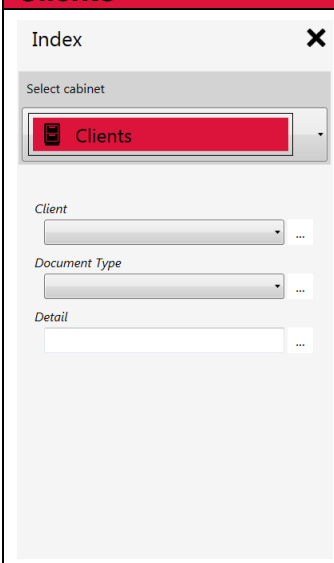
A cabinet where you can store all your client or customer information in one location.

Field 1 is named 'Client' and is a list field detailing your clients.

Field 2 is named 'Document Type' and again is a list but this time containing the different correspondence types between you and your client. Including; Purchase Orders, Invoices, Price List, Contract, Contact Sheets and General Correspondence.

Field 3 is named 'Detail' and is a free typing field for any additional information relating to a document.

Clients		
Index Field Name	Field Type	
Client <i>A list of your clients/customers.</i>	List	
Document Type <i>This is a list of all the different types of insurance documents.</i>	List Purchase Orders Invoices Prices Contract Contact Sheet General Correspondence	
Detail <i>This is a free typing field allowing you to enter any extra information you need.</i>	Text Allows a maximum of 256 characters. Letters, digits and symbols.	



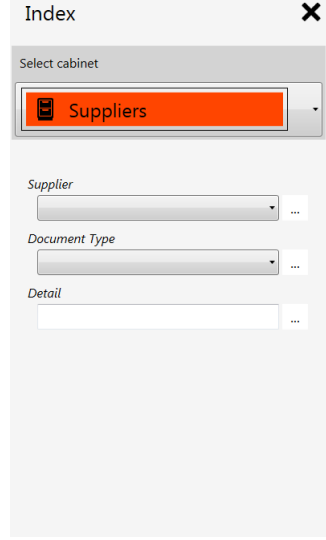
Suppliers Cabinet

Store all your supplier documents in one location.

Field 1 is named **'Supplier'** and as a list field, lists your Suppliers.

Field 2 is named **'Document Type'** and again as a list field details the different types of document associated with a supplier. Invoices, Credit Notes, Statements, Contracts, Pricing, etc...

Field 3 is named **'Detail'** allows you to free type any additional information about a particular document if required.

Suppliers		
Index	Index Field Name	Field Type
	Supplier	List
	<i>This is a list of all your suppliers.</i>	
	Document Type	List
	<i>This is a list of all the different documents your business would receive from your suppliers.</i>	Change of Details Contract Credit Note Delivery Note General Correspondence Invoice Pricing Purchase Order Statement
	Detail	Text
	<i>This is a free typing field allowing you to enter any extra information you need.</i>	<i>Allows a maximum of 256 characters. Letters, digits and symbols.</i>

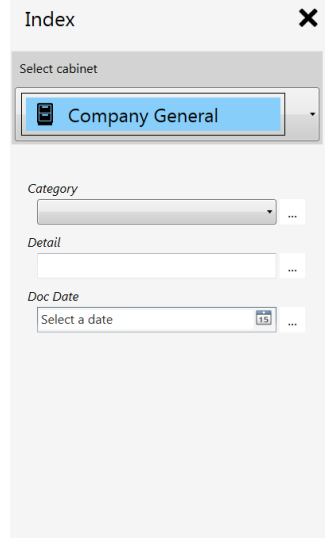
Company General Cabinet

You can create a cabinet to store all general company documents, such as documents relating to marketing, office equipment, telephones, bank, etc...

Field 1 is named **'Category'** and is a list field listing various categories in the general operation of business.

Field 2 is named **'Detail'** and is a free typing field for any additional information.

Field 3 is named **'Doc Date'** and is a date field for various uses. May simply be a document date or the expiry date if it relates to a contract.

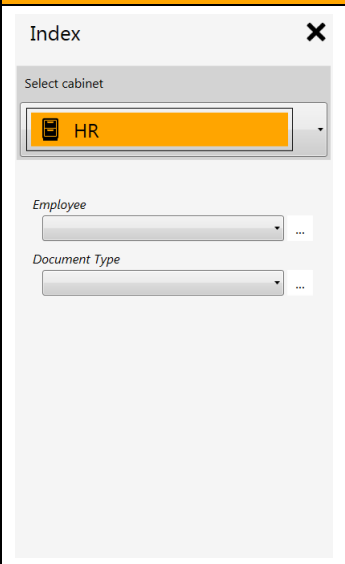
Company General		
Index	Index Field Name	Field Type
	Category	List
	<i>A list of the various areas of the business you might receive documents for.</i>	Bank General Bank Statements Company Credit Card – General Company Credit Card – Statements Marketing Office Equipment Contracts Office Equipment Servicing Premises Information Private Health Care Telephones (mobiles) Telephones (office)
	Detail	Text
	<i>This is a free typing field allowing you to enter any extra information you need.</i>	<i>Allows a maximum of 256 characters. Letters, digits and symbols.</i>
	Doc Date	Date
	<i>Set the expiry date of the insurance document.</i>	<i>Date format; use the calendar for easy and quick entry.</i>

HR Cabinet

Create a cabinet for your staff records. By using a different (additional) database for this, it means the cabinet can be kept separate from other cabinets giving you the ability to control who has access to it.

Field 1 is named '**Employee**' and is a list field listing employees past and present.

Field 2 is named '**Document Type**' and again is a list field but this one detailing employment related documents such as; Contract, Offer letter, Medical, Annual Reviews, Disciplinary, etc...

HR		
Index	Index Field Name	Field Type
	Employee	List
	<i>This is a list of all your employees.</i>	
	Document Type	List
	<i>This is a list of all the different employee document types.</i>	Annual Reviews Contract CV Disciplinary Medical Offer Acceptance Offer Letter P45 P60 Resignation Salary Info

Insurance Docs

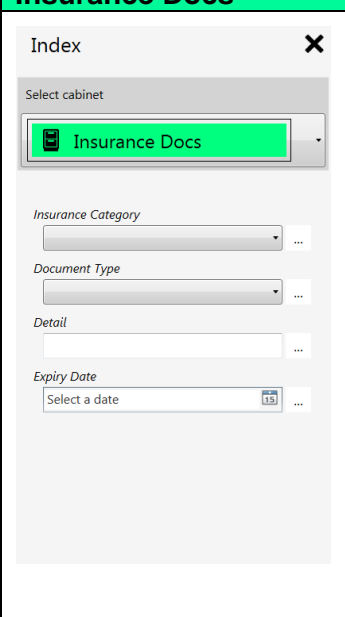
Keep all your company insurance documentation together.

Field 1 is named '**Category**' and is made up of a list of different types of insurance.

Field 2 is named '**Document Type**' and is a list detailing insurance related documents including; Claims, Policy docs, Renewal Docs, Proposal.

Field 3 is named '**Detail**' and is a free typing field for information relating to particular documents. In the case of an Insurance Police it could be the policy number.

Field 4 is named '**Expiry Date**' and is a date field, allowing you to set the expiry date of a document so that you can quickly perform searches on documents that are expiring soon.

Insurance Docs		
Index	Index Field Name	Field Type
	Insurance Category	List
	<i>A list of the insurance categories.</i>	General Motor Public Liability
	Document Type	List
	<i>This is a list of all the different types of insurance documents.</i>	Claims Policy Doc Proposal Renewal Docs Schedule
	Detail	Text
	<i>This is a free typing field allowing you to enter any extra information you need.</i>	<i>Allows a maximum of 256 characters. Letters, digits and symbols.</i>
Expiry Date	Date	
<i>Set the expiry date of the insurance document.</i>	<i>Date format; use the calendar for easy and quick entry.</i>	

Here are a few more cabinet suggestions for business...

Cabinet Name	Field Name	Field Info
Motor Vehicles	Registration Number	<i>A list of company vehicle registration numbers</i>
	Document Type	<i>A list of vehicle related document types</i>
Company Accounts*	Financial Year	<i>A list of financial years (2015-2016, 2016-2017)</i>
	Topic	<i>A list of accounts topics (Month End, Year End VAT, Salaries, Tax Codes)</i>

**As with the HR cabinet, you may wish to create the Company Accounts cabinet in a separate (additional) database to limit access...*