



Create Your Filing Categories

Use this worksheet to determine what files you need in each of the following categories.

Administrative – List all of the files you use to track your banking, taxes, billing, supplies, etc.

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Customer Support – List all of the files you use to track your customer support, including future follow up, returns, backorders, etc.

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Downline Support – List all of the files you use to support your downline, including new representative training, ongoing training information, team reports, individual coaching files, etc.

Host Coaching – List all of the files you use to track and work with your hosts, including current hosts, previous hosts, host information, host packet contents, etc.

Party Preparation– List all of the files you use in preparation for your party presentations, including catalogs, order forms, host special flyers, door prize drawing slips, wish lists, etc.
