


Field Manger Standard File Tree

This file tree has been developed over many years of working with Field Manager in their regional or home offices and in training sessions.

It is intended as a starting point for adapting your files to an organized structure.

File Name / Sub File	Explanation if Needed
@Team	Adding a symbol or number to the beginning of a file name brings that file to the top of the list. Do this with files that you most frequently refer to.
Rep by name	If you think of your rep by name, file that way
By territory	If you think of your reps by territory, file that way
Administration	This file is used to store information regarding the business of being in your business.
Travel Pending	Emails regarding upcoming travel – rename by trip date and destination. This way they will auto sort by timing.
Travel Completed	Maintain info regarding past trips until expenses have cleared.
Policies	Company polices and procedures.
Benefits	General benefit information
Coverage / Payer	The following files are job specific adapt to your personal job responsibilities
Medicare	
Medicaid	
Private	
Customers	
HMO	
Hospitals	
Doylestown	
Temple University	
Financial	Anything that has to do with money should be filed into this part of the file tree.
Budgets	
Expenses	
S Quotes	
Marketing	
Contests	
Compliance	
Labeling	

Products	
By name	
By competition	
Speaker Programs	
Professional Development	
Annual Review	
Associations	
Courses / Training	
Personnel	
Manager	
Vendors	
Candidates	
Colleagues	
Mike	
Todd	
Personal	
Reports	
By Due Date or	
By Title	

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