**Filing System Overview** Logo, company name

Description automatically generated

Store client emails in email file labeled Client Name – Street (if associated with a sale)

Store client documents in DropBox file labeled Client Name–Street

Make notes pertaining to pertinent client contacts in Outlook Contact File Notes section, can also make notes on bottom of Client Critical Date Checklist stored on-line. Put vendor box and KS locations at top of contact notes (so it’s the first thing seen within the note.)

If short sale, keep all bank contacts on the Short Sale Info Sheet and store in client DropBox. Keep client personal and financial data needed in the short sale in a hard copy (instead of electronic copy) in the green folder and return to client at COE. If we are working with the negotiator via email we will have to save much of that data electronically. We will delete that as much as we can after COE.

Once escrow closed, backup all data IAW the SOP – Backup Files. Remove closed files from DropBox and Outlook to preserve space. Copy onto hard drives for future access.