Best Practices For Computer File and Folder Organization

Consistency is the cornerstone of effective file organization. For buyers, sellers, or renters, create identical subfolder structures to streamline your workflow. Start every new client or project by copying and pasting a folder template tailored to your needs. Organize your files by category—such as buyers, listings, or rentals—and separate them by status, like active or closed. Stay on top of your system by downloading files directly into their appropriate folders rather than allowing them to pile up in your downloads folder. Finally, ensure all documents, such as prequalification papers, contracts, and media files, are clearly labeled and stored in their designated locations.

Pro Tips

- Spend an Hour Creating Your Folder Structure: Invest time upfront to save hours later.

- When in Doubt, Make Another Folder: Better to have an extra folder than misplaced files

- No Homeless Documents: Always save documents directly into the correct folder.

- Drag and Drop Is Your Best Friend: Move files into folders immediately.

- Do It in the Moment: Don't delay—organize as you go to prevent clutter

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<u>Step by Step Folder System</u>

- Joy Guttenberg Real Estate
  - Berkshire Hathaway Home Services Florida Properties Group
    - Buyers
      - 2023, 2024, 2025
        - Active
          - Template (keep empty bundle of folders for each new buyer)
            - Buyer Docs
            - Listings
            - Commission Agreements
            - Contract & Docs
            - Closing Docs
          - Misc Buyers
          - Leads
            - Zillow
            - Realtor.com
          - Under Contract
            - Buyer 1
            - Buyer 2
            - Buyer 3
        - Closed
          - Move closed buyers here
    - Listings
      - 2023, 2024, 2025
        - Active
          - Template (keep empty bundle of folders for each new listing)
            - Listing Presentation
            - Listing Docs
            - Pictures
            - Contract & Docs
            - Closing Docs
          - Active Listings
            - Listing 1
            - Listing 2
            - Listing 3
        - Closed
          - Move closed listings here
    - Rentals-Renters
      - 2023, 2024, 2025
        - Active
          - Template
            - Keep empty bundle of folders for each new renter/rental
          - Active Rentals/Renters
            - Renter 1
            - Renter 2
            - Renter 3
        - Closed
          - Move closed renters-rentals here

- Tools & Systems
  - Business Management
    - Realtor Business Success Plan
  - kvCORE
    - Contact Import Spreadsheets
    - Core Present – Win the buyer
    - Core Present – Win the listing
    - Core Squeeze Pages
  - Lead Gen Blueprints
    - Find all of these in cab corner/agent help site
  - MADI
    - Flyers
    - General Promo
    - Newsletters
    - Postcards
    - Property Promo
  - Marketing
    - Buyer marketing media
      - 6 Key steps to successful purchase
      - 18 reasons to use a buyer's agent
      - Buyer checklist & service protocol
      - Buyer Wishlist
      - Buyer's Guide
    - Seller marketing media
      - 6 Key steps to a successful sale
      - Seller marketing plan & listing protocol
      - Seller's Guide
    - Logos
    - Images
    - Social Media
      - FB, IG, Youtube, Twitter etc…
  - MLS
    - Stats & Info
- Licensing & Legal
  - Continuing Education
  - DBPR
  - Pre-Licensing
- Taxes & Finance
  - 2023, 2024, 2025
    - 1099s
    - Commission Spreadsheet
    - Expenses
    - P&L