



Become So SOHO Organized ... So Easily

Home offices have blurred the lines between work and family. Take advantage of the crossover to adopt organization strategies that work for both! UniKeep makes it easy with a flexible system that allows you to change and update your files and notes in compact and efficient storage.

Project & Event Planner

You may not think that Johnny's birthday party and your living room makeover have anything in common with the big tradeshow or your company's web site rollout. Think again. Nearly every event or large project has the same components: events, deadlines, vendors, shipping, and follow up are just some examples of the kinds of items that show up in project planning for both home and work. Once you adopt an organization system for your projects, you'll find that system will streamline your efforts and maximize your efficiency whatever the plans call for.

- Virtually every project has a timeline. List every deadline, including cancellation dates and follow up items. Leave spaces between items or use the "sort" function every time you print so that it's easy to add dates and keep everything in chronological order.
- Organize your notes by components like site info, vendor notes, food, and shipping/mailling so that you can use just what you need for each project.
- Try to keep rough ideas and sketches separated from the final choices. Designate sub-sections or a pocket, use colored paper or eliminate the sketches once a decision has been made.
- Place EVERYTHING in your project binder, even if you don't take time to organize it completely. Because the UniKeep binder is fully enclosed, you can keep everything from paint chips to business cards to site maps stored together in a compact and secure collection.
- Summarize all critical information onto a single page. Include event description, date, key contacts and personnel. This makes it easy to reference and share the essentials.
- Use tabbed pockets to separate multiple projects in a single binder. The tabs offer identification and the pockets hold receipts, flyers, tickets and discs.
- Larger events may need an entire binder. The tabbed pockets help keep the major subsections organized.
- Be sure to include maps – venue and lodging directions, site plans and seating charts.
- Keep a hole-punched notepad or a few blank pages in the front of your planner to take notes.

Tax Record Organizer

As one of the few certainties in life, annual income tax preparation can be stressful for nearly anyone. A good organization system can make this necessity significantly less taxing.

- Place EVERYTHING tax-related into your binder throughout the year, even if you wait until April to organize it. Since the UniKeep binder is fully enclosed, you won't have to worry about locating missing items.
- Set up pockets for major categories of deductions and records like W-2s and 1099s, receipts or statements from charitable donations, non-reimbursed job-related expenses, interest income, childcare receipts and medical expenses.



UniKeep organization project #17

Vehicle Records

Whether it's a company car or the family SUV, accurate records can simplify both maintenance and accounting all year long.

- Use a separate binder for each vehicle OR use UniKeep tab pockets to keep records for multiple vehicles in the same binder.
- File the receipts each time your vehicle is serviced. The receipts usually note the car's vital statistics, including the current date and mileage and specifically list exactly which parts were replaced. This will provide a good reference for future decisions, especially if you change technicians.
- Include a print out of the recommended maintenance schedule and warranty coverage for quick reference when making appointments.
- Designate a pocket for special offers and coupons that arrive before you are ready to schedule the service.
- Include recall notices along with the service records.
- If you perform your own vehicle maintenance, consider keeping sample labels or a reference sheet listing product specifics for items you regularly use like air filters, motor oil or transmission fluid.
- The fully enclosed UniKeep Case Binder can also store bulky items like small tubes or bottles of touch up paint, extra valve stem covers or ski rack keys.
- If you track your mileage for work or business, keep notes for regular or frequent destinations like round-trip mileage to the airport or to the offices of ongoing clients.
- Pockets for gas receipts or parking stubs can make end of year accounting easier.

Business Card Files

Business cards have become such a standard form for exchanging contact information, that nearly everyone has a collection ranging from client contacts to service providers to school emergency numbers. Many times the cards convey information that isn't easily transferred to an electronic contact manager, like photos, logos or handwritten notes.

- Consider which cards to keep and where. For household use, consider keeping a card binder near the telephone to contain cards for service vendors and civic organizations. When your neighbor recommends a reliable yard service or when your physician writes in your next appointment, file it for easy reference where everyone in the family can find it.
- Periodically, add an address book print out from your electronic address book to store in the same location.
- Use a separate file for cards that are strictly business or work-related. The compact and very portable UniKeep binder will easily slip into a briefcase or computer bag.
- If your collection of cards is large, consider splitting the collection alphabetically into multiple binders.

Things to consider when setting up your files:

All of the cover inserts and forms are available online at www.unikeep.com. You can write your information in the covers provided in your kit, or you can download as many copies as you need and edit the files with your individual information.

The files are Microsoft Word documents that have been saved as forms to prevent unwanted changes to the layouts. To use the existing formats and type in your own information, you can click on each field using your mouse or move through the fields using your tab key. Type into each field that you wish to use.

The photos or graphics can be replaced with your own images if you have clip art or digital files that you would prefer. Simply click on the image you wish to replace and Word will allow you to browse your computer to select the file to use. Don't forget to save the file to your local hard disk to save your additions.

If you wish to edit the colors, layout or basic text, you will need to "unprotect" the form. On the Forms palette you can click the padlock icon to unlock the form OR select Tools, then Unprotect Document from the Word menu at the top of the window. There is no password, so you can leave that field blank.

Once you have "unprotected" the file, you will have complete control over the document to change colors, content and images.