

How To Set Up A Simple Low-Cost Record Keeping System

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How To Set Up A Simple Low-Cost Record Keeping System

Every mail order business requires an accurate record-keeping system. This is necessary to keep tabs on orders, record shipments, prevent duplication, etc. It is also important for tax purposes.

After many years in this business, we think this is the ideal combination filing AND bookkeeping system. This method is inexpensive, easy to use and extremely reliable and efficient.

The secret lies in the use of standard 3" x 5" "Index" cards, available in white and a variety of colors, ruled or plain. These may be purchased from most variety, stationery, department stores, etc. The cards are packaged in units of 100 each and priced within everyone's budget. Greater savings can be had by buying from wholesale paper companies or retail/wholesale firms specializing in office & stationery supplies. (look in your Yellow Pages under "Paper Dealers" and "Paper Dealers-Wholesale & Mfrs."). In some cases, when purchasing from wholesalers, only case lots or 10 packs (1000 cards) is possible. However, the extra savings can be substantial. The corrugated carton in which the cards are packed makes an ideal space-saving "file-drawer" when the cover is carefully removed. 1,000 cards occupy less space than a 1-lb loaf of bread!

Select a different color card for each year, such as white for 1979, blue for 1980, etc. The use of various colors facilitates easier up-dating and "cleaning out" inactive accounts., than searching cards for dates actual orders are recorded on the same card. The name of the customer (last name first) is recorded in the upper left hand corner.. Complete address follows. These are filed in alphabetical order. To save space, notes on the cards may be abbreviated. But it is extremely important that these notes are understood by all who will be working with the file... Complicated "codes" could cause frustrating problems.

Upon opening every piece of incoming mail, the file must first be checked to see if a card for that customer already exists. If not, a card is promptly completed.

All pertinent information is recorded on the card, in addition to the customer's name and address: date received, origin of order (from which ad in which publication, or circular), item ordered, type of payment (check, money order, cash), or item customer inquired

about. For inquiries, specify exactly what was sent in return, such as letter, circular, etc.

Most important is the recording of the date the order was shipped and what method: 1st class mail, 3rd class mail, parcel post, UPS, etc.. This is necessary in the event the order is not received in due course.

You may also record the home address and phone number of the customer, which may appear on the order form, check, letterhead, etc. Also, the check number. Also the name of the person who placed the order, if it is a company. And signer of the check, if legible.

Coupons from ads or circulars may be stapled to the back of the card. All future business transactions must be recorded on each customer's card. When one card is filled, staple a second to the front of the first.

For customers living within your state, where you must pay sales taxes on orders, a small red check mark or "X" in either upper corner helps separate these customers at year's end, when taxes must be completed.

MORE IMPORTANT INFORMATION worth reading to keep records in order: "How To 'Key' Advertising To Measure Results" is the best way to keep from wasting advertising dollars. Just \$1.00 from above Publisher or Fun Mates Press-FMS/15, Box 6466, San Francisco CA 94101.