

January Cloud Bytes: Naming Convention Best Practices



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Join us for this month's Cloud Bytes session on Naming Convention Best Practices happening **Wednesday, January 17 at 2 PM ET!**

We've all been there. You do a search, but because it didn't follow the naming conventions you thought were in place, you can't retrieve it!

It's Murphy's Law that the one file you need to find in a time crunch is going to be that one elusive file that isn't named quite like the others, and as a result, can't be easily found. During audit time or client invoice disputes, this is especially painful.

When you're dealing with mountains of data, documents, client accounts and temporary projects, strong naming conventions are absolutely critical to the success of your workday and cost efficiency in your business.

In this month's Cloud Bytes, we've compiled all of the most critical naming convention methods for key data in your [best-in-class financial management system](#). In this session's highlights, you will learn:

- Why it's so important to set up and adhere to a strong naming convention system for your company, and the added benefits of tightly organized data.
- User tips on how to name financial reports for automatic filtering, quick retrieval, and easy storage.
- Do's and don'ts for consistently naming projects that your teams regularly access and store in your company's integrated software systems. That way, whether your teams are accessing files from Sage Intacct or your CRM solution – they can find what they're looking for.
- How to effectively name customers and vendors to avoid hiccups inconsistencies when it comes to multiple entities or locations.
- Ways to name attachments that align Sage Intacct's auto-numbering and folder locations for company-wide organizations and hassle-free retrieval.

We will go through these tools and more [for you to gain the most value possible from your Sage Intacct system](#) and your data storage structure. Before the session, be sure to write down your questions, and any areas where you could use a little guidance.

It's the start of a new year and the perfect time to shape up your company's naming conventions to streamline your reports, projects and important company data even more, for working toward what will be your best year yet!

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