Document Naming **Convention**
Quick Reference Cheat Sheet

THE NAMING FORMULA

YYYY-MM-DD_Category_Description_Vendor

Example: 2025-02-17_RCT_Printer-Ink_BestBuy.pdf

CATEGORY CODES

💰 Financial & Receipts

RCT	Receipt	Store purchases, online orders
INV	Invoice	Bills received, service invoices
TAX	Tax Document	W-2, 1099, returns, deductions
BNK	Bank Statement	Monthly statements
PMT	Payment Confirm	Payment receipts, wire transfers

⚖️ Legal & Contracts

CTR	Contract	Agreements, leases, NDAs
LGL	Legal Document	Court filings, legal notices
LIC	License/Permit	Business licenses, certs

🏥 Insurance & Medical

INS	Insurance	Policies, claims, EOBs
MED	Medical	Lab results, prescriptions

🏢 Business Operations

BIZ	Business General	Registration, filings
COR	Correspondence	Letters, formal comms
RPT	Report	Financial reports, analysis
PRO	Proposal	Client proposals, bids, quotes

🏠 Personal & Property

PER	Personal ID	Passport, birth cert, SS card
VEH	Vehicle	Title, registration, service
HOM	Home/Property	Deed, mortgage, repairs
WRN	Warranty	Product warranties
MSC	Miscellaneous	Anything else

5 GOLDEN RULES

1 **Date first — always.** YYYY-MM-DD format sorts chronologically in every folder, automatically.

2 **Underscores between** elements, **hyphens within** words. Office_Supplies → Office-Supplies.

3 **2–4 word descriptions.** Keep it short. If you need a sentence, it's too long.

4 **No spaces or special chars.** Letters, numbers, hyphens, and underscores only.

5 **Save as PDF.** Most universal and compact format for scanned documents.

✓ **Consistent vendor names.** Pick one spelling and stick with it (e.g., always "HomeDepot").

SCAN A DOCUMENT IN 10 SECONDS

1 Note the **date** → **2** Pick the **category code** → **3** Write a 2-4 word **description** → **4** Add the **vendor name** → **5** Save as **PDF** in matching folder

Folder Structure & Examples
Quick Reference Cheat Sheet — Side 2

MONOMOY STRATEGIES
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RECOMMENDED FOLDER STRUCTURE

No year subfolders needed — the YYYY-MM-DD prefix sorts files chronologically within each folder automatically.

📁 Financial	RCT INV BNK PMT	📁 Insurance	INS
📁 Tax	TAX	📁 Medical	MED
📁 Legal	CTR LGL LIC	📁 Business	BIZ COR RPT PRO
📁 Personal	PER VEH HOM WRN	📁 Misc	MSC

REAL-WORLD EXAMPLES

FILE NAME	WHAT IT IS
`2025-02-14_RCT_Office-Supplies_Staples.pdf`	Staples receipt from Feb 14
`2025-01-31_BNK_Monthly-Statement_Chase.pdf`	January bank statement from Chase
`2025-02-01_INV_Web-Hosting_GoDaddy.pdf`	GoDaddy hosting invoice
`2024-12-15_TAX_1099-NEC_ClientName.pdf`	1099 tax form from a client
`2025-01-10_CTR_Consulting-Agreement_FortHealth.pdf`	Consulting contract
`2025-02-05_INS_Auto-Policy-Renewal_Geico.pdf`	Auto insurance renewal
`2025-01-20_MED_Lab-Results_Quest.pdf`	Lab work from Quest Diagnostics
`2025-02-10_HOM_Furnace-Repair_ABCHeating.pdf`	Home repair receipt
`2025-01-15_VEH_Oil-Change_JiffyLube.pdf`	Vehicle service record
`2025-02-12_PRO_AI-Strategy_ClientCo.pdf`	Client proposal

PRO TIPS

🔍 Use Your OS Search
With this convention, Windows Search instantly finds files by date, category code, description, or vendor. No special software needed.

🏢 Works Everywhere
This system works on your computer, Google Drive, Dropbox, OneDrive — any platform that sorts alphabetically.

⚡ Category Codes Are Instant Context
Glance at any folder: RCT = receipt, TAX = tax-related, CTR = contract. You know what you're looking at without opening a single file.

📃 Short Descriptions Win
"Office-Supplies" is enough. You don't need "Office-Supplies-Purchased-At-Staples-For-The-Printer-In-The-Back-Room."

📁 One Formula, Every File
Receipts, contracts, medical records, tax docs — they all follow the same pattern. Learn it once, use it forever.

💡 Start Today
Don't try to rename old files. Start using this convention now. Over time, your organized files will outnumber the chaos.

Want the Full Guide?
Download the complete Document Naming Convention Guide with detailed examples, category explanations, and implementation tips.

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