Sample Cabinets - Home

For a document on how to create a cabinet, please click here.

For a video guide on the different field types, please click here.

Here are a few sample cabinet ideas you may want to look at for home use…

Remember these are only suggestions to get you thinking what would work for you. All cabinets are customisable for your needs. Note that not all fields have to be completed when indexing a document, only complete fields relevant to the particular document.

Household Cabinet

Store all you household documentation in one easy to manage cabinet. Including; utility bills, home insurance docs, telephone/broadband bills and council tax.

Field 1 is named **'Document Category'** and details the type of document you are storing.

Field 2 is named **'Document Detail'** and allows you to add any additional information such as an Insurance Policy number or in the case of filing an Appliance Contract you could specify the item it refers to. It is a free typing field.

Field 3 is named **'Expiry Date'** or **'Doc Date'** it is a date field where you specify the document date or in the case of a contract, the expiry date.
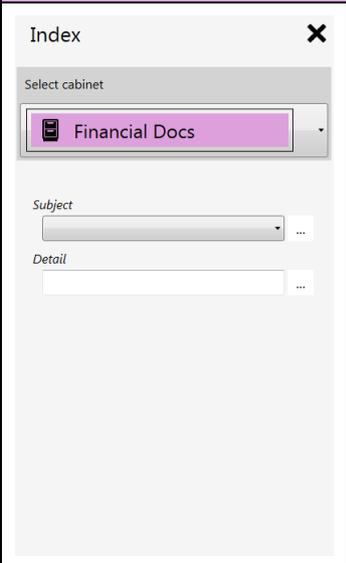
Household

Index Field Name	Field Type
Document Category	**List**
A list of your typical household documentation.	Appliance Contracts Council Tax Gas Bills General Maintenance Insurance Documents Legal Documents Mortgage Telephone/Broadband Water Bills
Document Detail	**Text**
This is a free typing field allowing you to enter any extra information you need.	*Allows a maximum of 256 characters. Letters, digits and symbols.*
Expiry/Doc Date	**Date**
Set the expiry date or date info of a document.	*Date format; use the calendar for easy and quick entry.*

Index ✕

Select cabinet

▣ Household ▾

Document Category
▾ ...

Document Detail
...

Expiry/Doc Date
...

Financial Docs Cabinet
You have created a cabinet for your general household documents. Users often set up a separate cabinet for all their finance/bank related documents.

Field 1 is named **'Subject'** and lists different categories of finance documentation.
Field 2 is named **'Detail'** and can be used to add any additional information you might want for a particular document.
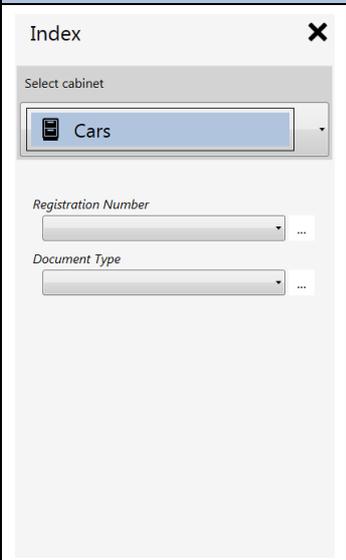
Financial Docs		
	Index Field Name	**Field Type**
	Subject	**List**
	This is a list of all the different finance document types you might receive.	Bank General Bank Statement Credit Card General Credit Card Statement ISA Loans Mortgage Passwords Share Dividend Share Purchase
	Detail	**Text**
	This is a free typing field allowing you to enter any extra information you need.	*Allows a maximum of 256 characters. Letters, digits and symbols.*

Cars Cabinet
Create a cabinet for all your vehicle documentation. Store car insurance documents, MOT certificates and sale information for any vehicle you or any of your family members own.

Field 1 is named **'Registration Number'** and is a list of registration numbers you can index documents against.
Field 2 is named **'Document Type'** and is a list of standard documents relating to cars.

Cars		
	Index Field Name	**Field Type**
	Registration Number	**List**
	This is a list of all the vehicle registration numbers you own or have owned.	JG10MJG RV14YYY
	Document Type	**List**
	This is a list of all the different car related document types.	Breakdown Cover Claims General Maintenance Insurance MOT Purchase Registration Doc Service Docs Vehicle Sale

Work Cabinet

Keep any work and employment related documentation together in a Work Cabinet. Have a single location you can store and manage all your family member's employment information.

Field 1 is named **'Family Member'** and is a list of all your family members in employment (or have been in employment).

Field 2 is named **'Employer'** and is a list of the companies you or your family work for now or in the past. You will be able to perform searches on documents to do with a particular family member or employer, or both.

Field 3 is named **'Document Type'** and is a list of various documents associated to work.

Work		
Index	**Index Field Name**	**Field Type**
Select cabinet: **Work**	**Family Member**	**List**
Family Member	*This is a list of your family members in employment.*	Jane John Molly
Employer	**Employer**	**List**
Document Type	*This is a list of company names your family members are working for or have worked for.*	ABC Ltd Filestream Ltd
	Document Type	**List**
	This is a list of the various work/employment document types.	Annual Reviews Contract Offer Acceptance Offer Letter P45 P60 Resignation Salary Tax Return