

File Naming Conventions

Consistent file naming is just as important as good folder structure. Smart naming conventions make files instantly recognizable, searchable, and easy to sort, whether you're working alone or with a team.

Why File Naming Matters

- **Instant recognition** of file content and purpose
- **Chronological sorting** shows newest/oldest files first
- **Version control** prevents confusion about which file is current
- **Search efficiency** helps you find files using keywords
- **Team collaboration** ensures everyone understands file purposes

Step 1: Choose Your Naming Format

Pick one format and stick to it across your entire organization:

Date-First Format (Recommended): YYYY-MM-DD_Description_Version

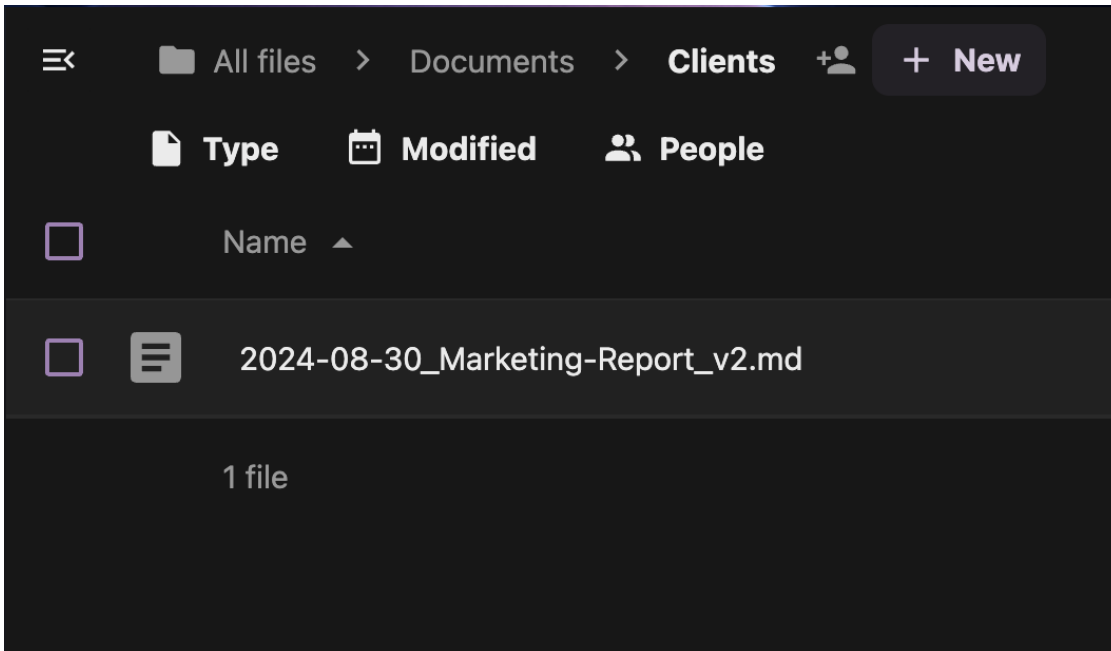
- Example: 2024-08-30_Marketing-Report_v2.pdf
- **Benefit:** Automatic chronological sorting

Project-First Format: ProjectCode_Description_YYYY-MM-DD

- Example: ACME_Logo-Design_2024-08-30.ai
- **Benefit:** Groups project files together

Client-First Format: ClientName_ProjectType_Description

- Example: Johnson-Co_Website_Homepage-Mockup.psd
- **Benefit:** Easy client file identification



Step 2: Create a Naming Template

Document your chosen format for team consistency:

Template Example:

```
Format: [Date]_[Project]_[Description]_[Version]
Date: YYYY-MM-DD
Project: Short code or client name
Description: What the file contains
Version: v1, v2, final, draft
```

1. **Create a new document** in your Templates folder
2. **Title it:** "File Naming Convention"
3. **Include examples** for different file types
4. **Share with team members** for consistency

Step 3: Handle Different File Types

Documents:

- 2024-08-30_Proposal_ClientName_v3.docx
- 2024-08-30_Invoice_12345_final.pdf
- 2024-08-30_Meeting-Notes_TeamSync.txt

Design Files:

- 2024-08-30_Logo_ACME_concept-A.ai
- 2024-08-30_Banner_Homepage_1920x1080.png
- 2024-08-30_Mockup_Mobile-App_wireframe.sketch

Media Files:

- 2024-08-30_Video_Product-Demo_4K.mp4
- 2024-08-30_Photo_Team-Headshots_processed.jpg
- 2024-08-30_Audio_Podcast_Episode-15.wav

Step 4: Implement Version Control

Use clear version indicators to track file evolution:

Version Naming Options:

- **v1, v2, v3** - Simple numeric versions
- **draft, review, final** - Status-based naming
- **YYYY-MM-DD** - Date-based versions
- **initials** - Author-based versions (JD, SM, etc.)

Example Version Progression:

```
2024-08-30_Website-Proposal_ACME_draft.docx
2024-08-30_Website-Proposal_ACME_v2.docx
2024-08-30_Website-Proposal_ACME_review.docx
2024-08-30_Website-Proposal_ACME_final.docx
```

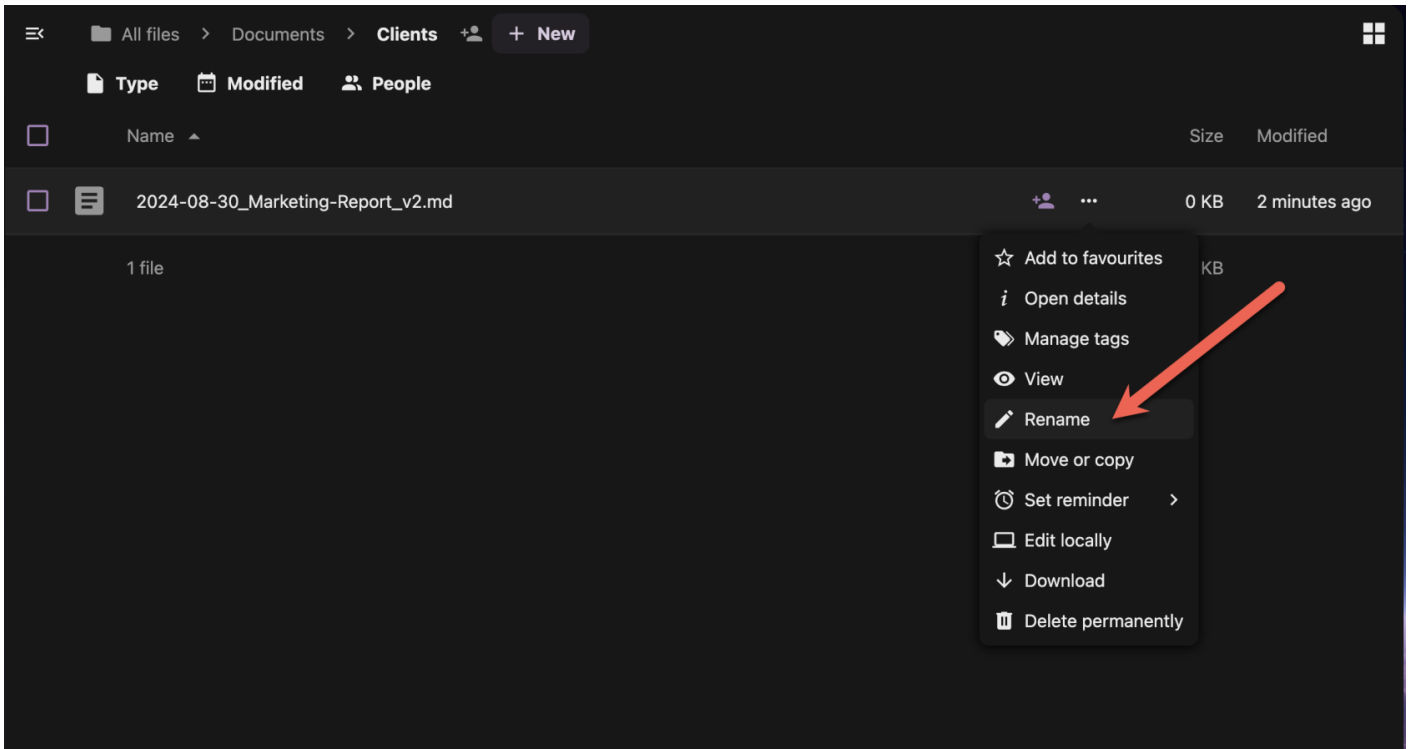
Step 5: Rename Existing Files

Clean up your current files to match your new convention:

1. **Right-click** a file you want to rename
2. Select **"Rename"** from the context menu
3. **Update the filename** following your convention
4. Press **Enter** to save

Bulk Renaming (Advanced):

- Select multiple similar files using **Ctrl+click**
- Use the desktop app's bulk rename feature if available
- Consider renaming in batches by file type or project



Step 6: Use Descriptive Keywords

Include searchable keywords in your filenames:

Good Examples:

- 2024-08-30_SEO-Audit_Keywords-Research_final.xlsx
- 2024-08-30_Brand-Guide_Logo-Colors-Fonts.pdf
- 2024-08-30_Budget-Forecast_Q4-Planning.docx

Keywords to Include:

- **Purpose:** audit, report, guide, template
- **Content type:** data, analysis, mockup, screenshot
- **Status:** draft, final, approved, archived
- **Audience:** internal, client, public, team

Step 7: Avoid Common Naming Mistakes

☐ Characters to Avoid:

- Special characters: `/ \ : * ? " < > |`

- Spaces at beginning or end
- Multiple consecutive spaces
- Only numbers or dates

☐ **Bad Examples:**

- `untitled1.docx` (no description)
- `Final version 2 REAL final.pdf` (confusing versions)
- `client stuff/meeting notes.txt` (contains slash)
- `Document1 copy.docx` (generic name)

☐ **Good Examples:**

- `2024-08-30_Client-Presentation_Q3-Results_final.pptx`
- `2024-08-30_User-Research_Survey-Analysis_v2.xlsx`
- `2024-08-30_Contract_Service-Agreement_signed.pdf`

Creating File Naming Templates

Set up templates for common file types:

1. **Navigate** to your Templates folder
2. **Create** example files with proper naming
3. **Use as reference** when creating new files
4. **Update templates** as your conventions evolve

Template Examples:

```
YYYY-MM-DD_Meeting-Notes_[Meeting-Type]_[Attendees].docx  
YYYY-MM-DD_Invoice_[Client]_[InvoiceNumber].pdf  
YYYY-MM-DD_Design_[Project]_[Version].[ext]
```

Best Practices Checklist

☐ **Consistency Rules:**

- Use the same format across all files
- Stick to your chosen date format (YYYY-MM-DD recommended)
- Apply version control consistently
- Include descriptive keywords

☐ **Technical Guidelines:**

- Keep filenames under 255 characters
- Use hyphens or underscores instead of spaces
- Avoid special characters
- Use consistent capitalization

□ **Team Coordination:**

- Document your conventions
- Train team members on the system
- Review and update conventions quarterly
- Lead by example with consistent naming

Next Steps

With solid folder structures and file naming conventions in place, you're ready to learn about using tags, comments, and metadata to make your files even more organized and searchable. The next page will show you how to add rich information to your files for powerful organization capabilities.

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