

5 ways to keep track of business cards

“My boss is inundated with business cards,” writes an admin reader. “Some are in Rolodexes, others are loose. But he doesn’t want to weed through and toss old ones. Any ideas on how to organize them?”

No matter the approach, be consistent. If he’s more comfortable with a Rolodex, for example, help him move all the cards to that one system.

More advice from administrative professionals:

1. Invest in a card scanner, like the one offered by Dymo (www.cardscan.com), and turn the cards into an online database that can be synced with e-mail programs and mobile devices.

2. Manually enter all the b-card information under Contacts in his e-mail software. Fill in as much detail as possible, including, for example, the names of assistants. Check the back of the card for any notes. Keep the b-cards as a backup, until the boss is comfortable with the new system.

Tip: Create categories under the Master Category, so he can quickly find what he needs. For instance, one category might include everyone with a certain company, while another lists people who specialize in life insurance.

3. File cards in a three-ring binder with A-Z tabs and 10-card sleeves. Date the cards as you add them, so you’ll know which are the most current versions.

4. Stick with the tried-and-true Rolodex. Says one admin, “My boss wants to keep them all, so I put them on Rolodexes, alphabetized and according to category. We’re on Rolodex No. 2 with about 800 cards.”

5. Make use of your iPhone. Apps such as CardMunch.com (free) and Shoeboxed.com allow you to point and capture a business card, then have the data automatically appear in an iPhone’s Contact list.

If your boss already has an iPhone, nothing beats this technology for its ability to instantly capture information.