

# QiLife™ | Sop File Flow

☰ Tags

## **QiLife FileFlow SOP: How to Name, Organize, and Automate Your Files**

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## **QiLife FileFlow SOP: How to Name, Organize, and Automate Your Files**

### **Why This Matters**

This guide explains how to name and organize all your files and folders in the QiLife system. It sets up a shared structure that both you and your AI assistant can understand and use effectively.

It helps two main groups:

- **You (the user)** – to keep your files neat, easy to find, and consistently named.
- **The AI assistant** – so it can rename files, sort them into folders, and understand the content.

This system is like a shared language between you and your digital assistant.


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## I. Folder Structure & Drive Letters

Your folders act like digital "drives." Each one has its own prefix letter. All files and subfolders inside must begin with that letter to maintain structure and sortability.

### Drive Letters:

- **A** = Inbox (new files, temp work, review-needed items)
- **R** = Resources (templates, scripts, guides, media)
- **B** = Business (ops, branding, staff, workflows)
- **C** = Contacts (clients, vendors, personal connections)
- **F** = Finance (taxes, income, budgets)
- **L** = Legal (cases, disputes, agreements)
- **P** = Private (health, identity, journals)
- **Z** = Archive (retired data, inactive folders)

 **Naming Tip:** Every folder name ends in an underscore **\_**. This makes scanning and sorting easier.

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## II. How to Name Folders

<Drive Letter> + <2-Digit Folder Index> + <3-Letter Short Code> + (optional: year, type, initials)

**Example:** **F10tax2024\_**

- **F** = Finance Drive

- **10** = 10th subfolder
- **tax** = Category short code
- **2024** = Relevant year
- **\_** = Always ends with this

## Folder Structure Rules:

- Max depth: 3 folder levels
- Keep names short and standardized
- Use **0000** if no year is known

## Optional Subsegments:

- Year: **2024**, or **0000** if unknown
- Document Type: **W2S**, **INV**, etc.
- Initials: e.g. **JRV** = Joel Rice Velasquez
- Tags: **PAY**, **ASB**, **HRD**



## III. How to Name Files



<FolderCode>\_<FileType>\_<Tag>-<Date>-<Person>.ext

**Example:** **F10tax2024w2\_IncomeStatement-20251231-RiceVelasquez\_Joel.pdf**

## Breakdown:

- **F10tax2024w2\_** = Folder lineage
- **IncomeStatement** = File type
- **20251231** = Date in **YYYYMMDD**
- **RiceVelasquez\_Joel** = Person name
- **.pdf** = Extension

## ✓ File Naming Rules:

- Use  in folder codes
  - Use  for file tags, dates, names
  - Be readable, clear, and specific
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## IV. How AI Sorts Files

The AI uses keywords, file type, and document content to:

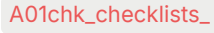
1. Identify the file
2. Rename it correctly
3. Place it in the right folder

### AI Considers:

- File format (PDF, DOCX, JPG, etc.)
- Words in the title or text
- Recognized names, dates, IDs
- Form type (W-2, invoice, ID)



### Unmatched Files:

- Will go to 
  - Or the AI will ask you to confirm folder placement
- 



## V. Acronyms & Keywords

Every folder short code has related tags and keywords to help the AI match documents.



Glossary Coming Soon: A full list of all folder codes grouped by drive. It connects:

- Code → Keywords → Folder ID → Use case
- Helps the AI auto-sort
- Helps users stay consistent

**Example:**

- **F10tax** = tax, refund, IRS, 1099, 1040, TurboTax
  - **R00for** = template, guide, sample, doc, form
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## VI. How Automation Works

The FileFlow system follows this two-step logic:



### Step 1: Smart File Renaming

- AI reads file
- Extracts metadata (date, type, name)
- Builds filename using the SOP pattern
- Fills in gaps with **0000** or **MIS** if needed



### Step 2: Smart File Sorting

- Compares filename to folder map
- Places file in the closest match
- Flags uncertain files for review



### Extras You Can Add:

- Confidence scores
  - File versioning
  - Duplicate cleanup flags
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## VII. Special System Tags

Used to track file status, errors, or temporary needs.

### Examples:

- **PEN** = Pending action or update
- **MIS** = Unsorted or unknown category
- **0000** = Missing or unknown year/date
- **TMP** = Temporary file (trash later)
- **DUP** = Detected duplicate
- **ERR** = Damaged or corrupted file



Example Filename: **F10tax0000\_TMP-PayStub.pdf**

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## VIII. Final Checklist

- All folders and files follow format rules
- Folder names use: **DNNxxx\_** (Drive, Index, Code)
- AI follows the SOP pattern unless told otherwise
- Human overrides must be documented for consistency

This SOP is the blueprint of your **QiLife FileFlow system**.

It aligns:

- Human logic
- AI pattern recognition
- Smart organization



Next: Build the Glossary of Drives, Codes, Acronyms, and Metadata Tags to finish training your system. Let's go!

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