

Set up folders for your team

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A little structure before your team starts filing makes everything easier to find. Most teams start with a folder per client, department or kind of record.

Before you start

You need permission to file records and create folders, and renaming a folder needs a reason.

1 Make a top-level folder

In **Files**, go to **All files** and click **New folder**. Type a name such as “Clients” and click **Create folder**.

2 Add folders inside it

Open the folder you’ve just made and click **New folder** again. Each new folder goes inside the one you’re in, and you can go up to eight levels deep.

3 Rename a folder

Hover over the folder and click the pencil, or choose **Rename...** from its **?** menu. Type the new name, choose a reason, add a few words about why, and click **Rename folder**.

4 Protect anything sensitive

If a folder holds records people should only open for a good reason, such as HR files, ask an admin to [protect it](#).

Names

Folder names can use letters, numbers, spaces, full stops, hyphens and underscores. Two folders in the same place can’t share a name.

Renaming a folder keeps everything in it as it was, with the same dates and receipts. Renaming a protected folder waits for a second administrator to approve it in **Approvals**.

If something goes wrong

There’s no **New folder** button.

You don’t have permission to create folders. Ask an admin in your organisation to [change what you can do](#).