# 25 Create New Client Folders

## How to Get a Manager Check-Off

Under the supervision of the Challenge Center Manager or a member of the Sales Team, create a digital and/or paper client folder.

## Procedure Details

There are two types of client folders: Digital and Paper. It won’t be often that you will need to create a client folder, but it’s important to know how it should be labeled and where it should be stored.

To create a paper folder, get an empty manila folder from the supply cabinet. It is ok to get a folder that has already been previously used. Gently pull off any previous labels, if possible. Ask a Front Desk Assistant for the label maker. When creating a label, consider who the group is and if they are a subgroup of a larger group. For example, are they a class/group within a high school, a department within a business, or just a single entity. Here are some ways to create a label for a group/subgroup:

CSUS – RPTA 122 (Rolloff)

City of Sacramento – Public Works

Butte College – ASI

Fitsom Studios

There might be many clients from CSUS, City of Sacramento, or Butte College so it is important to distinguish exactly who is coming from that place. We don’t want all CSUS clients to end up in the same folder.

Folders are then stored short term in the bottom drawer at the desk of the Challenge Center Manager. Once the client’s program has happened, the folders are stored long term in large filing cabinets in the office.

To create a digital folder, navigate to P-Drive -> Clients, Itineraries, Contracts. If you are creating a sub group, you’ll need to go one file deeper. For the RPTA example above you would navigate to: P-Drive -> Clients, Itineraries, Contracts -> CSUS -> RPTA. From there you could create an additional folder for the professor (Rolloff), if one wasn’t already made. The likelihood of you creating a digital folder is very low, but knowing how and where things are stored is extremely helpful when you are trying to find where something is stored. If you are ever in doubt, please ask a member of the Sales Team.

\*\*Digital folders and paper folders should be labeled the same way.