



## Why Can't Our Clients Find Their Computer Documents? And How Can We Help Them?

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## Causes of Digital Disorganization

- TIME
- LACK OF KNOWLEDGE
- PREFERENCE FOR SEARCHING

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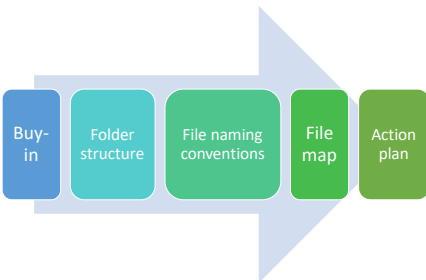
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## Solution



- Buy-in
- Folder structure
- File naming conventions
- File map
- Action plan

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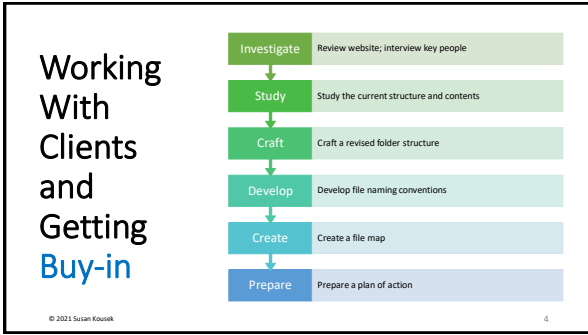
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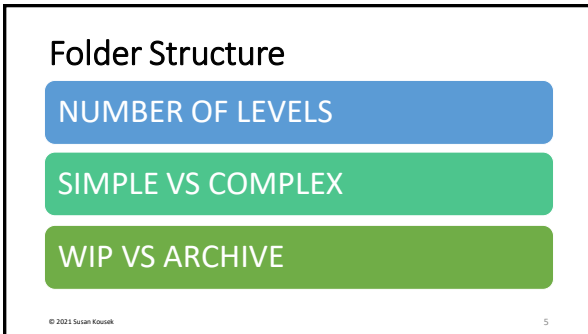
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## Create a List of All Folders and/or Files

- IN WINDOW'S FILE EXPLORER, SHIFT/RIGHT CLICK FOLDER
- SELECT "OPEN POWERSHELL WINDOW HERE"
- [NOTE: THERE IS A SPACE AFTER TREE AND BEFORE AND AFTER THE > SYMBOL]
- ENTER: TREE /A > FILENAME (NAME IT WHATEVER YOU WANT, SUCH AS FOLDERLIST)
- OR FOR FOLDERS **AND** FILES: TREE /F > FILELIST
- FIND THE FILE IN THE SAME FOLDER, OPEN IT IN WORD, LEAVE IT SET TO "UNICODE"
- SAVE AS A WORD DOC (CLOSE POWERSHELL)

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## Action Plan

- Start with new documents; then move old documents
- Two-person job
- After hours
- Your role

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## Cautions



PROVIDING ESTIMATES



PROFESSIONAL LIABILITY INSURANCE



CONFIDENTIALITY

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**Marketing**

- EXISTING CLIENTS
- CORPORATE IT PEOPLE
- COMPUTER TECHS

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