PRIVATE CLIENT SERVICES
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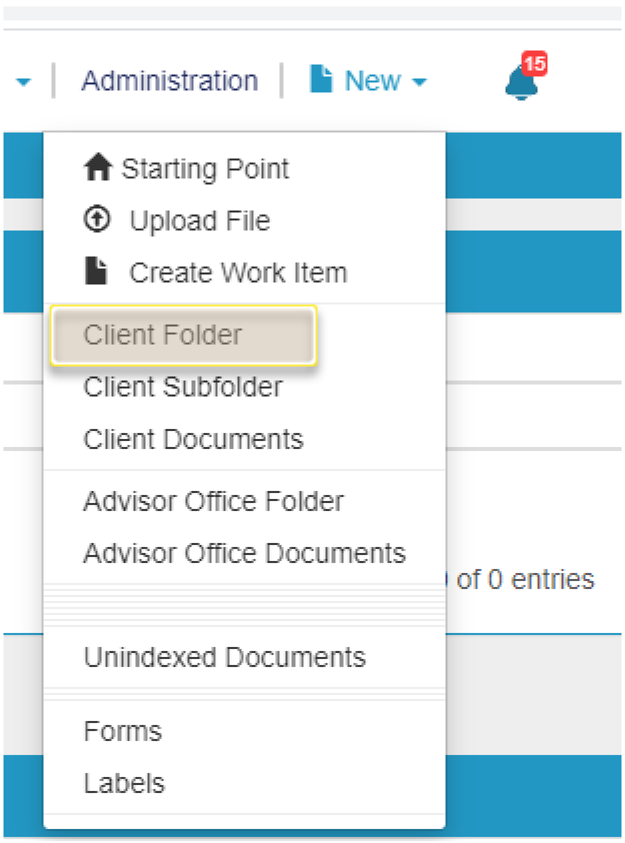
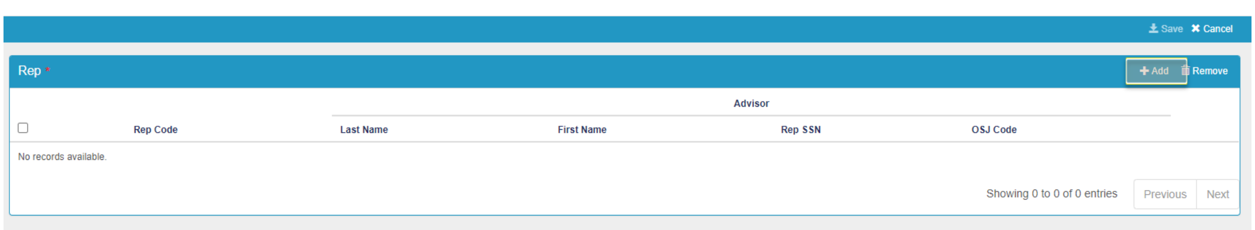
Adding a Client Folder and Subfolder

This step-by-step guide will walk you thru the process of adding a client folder and subfolder to Docupace.

Click on New – Client Folder

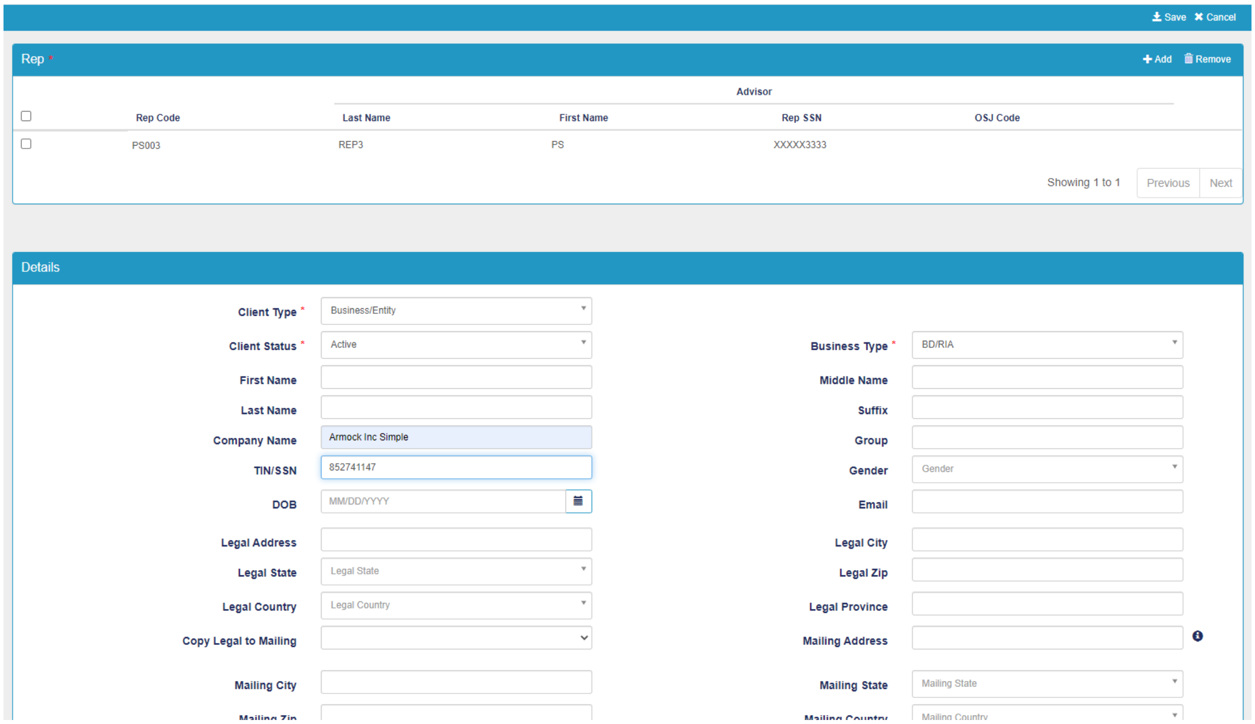


Click Add in the Rep section.

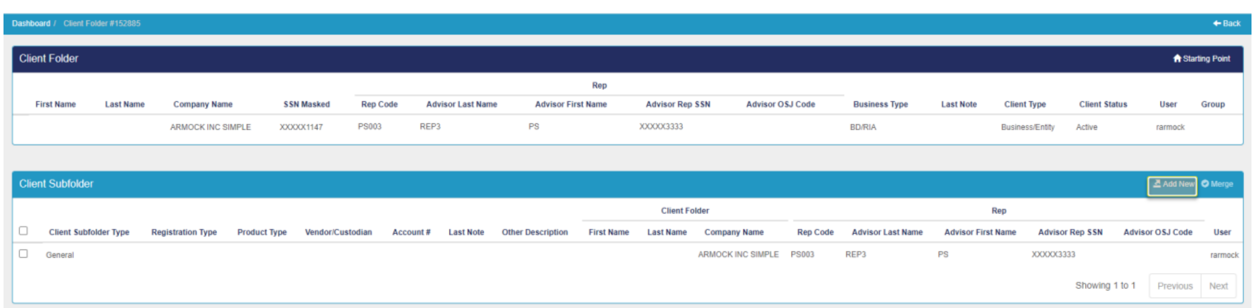


Check the appropriate Rep Code the client folder should be under and click Select.

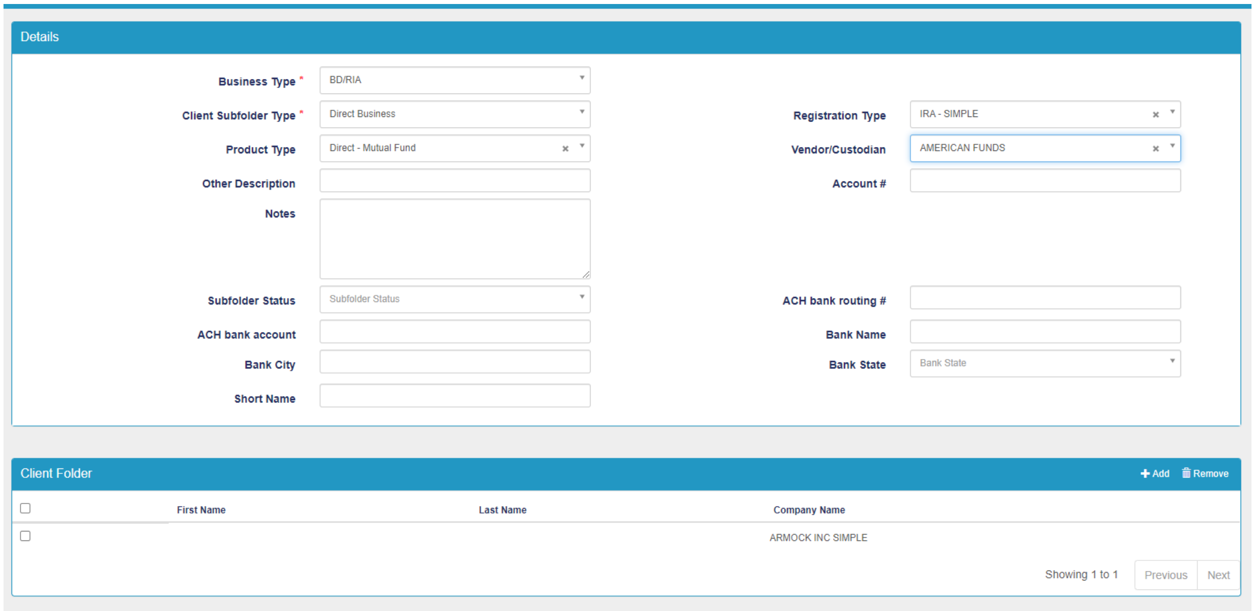
Fill in as much information as possible for the client folder and click Save in the upper right corner. For a Person, First Name, Last Name and TIN/SSN are required. For Business/Entity, only Company Name is required.



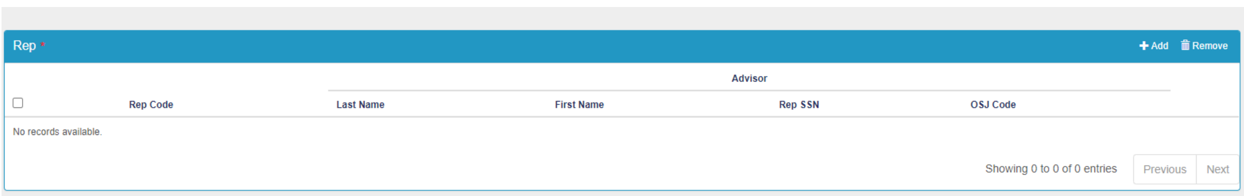
The Client Folder and a General Client Subfolder are created. To add another subfolder, click Add New.



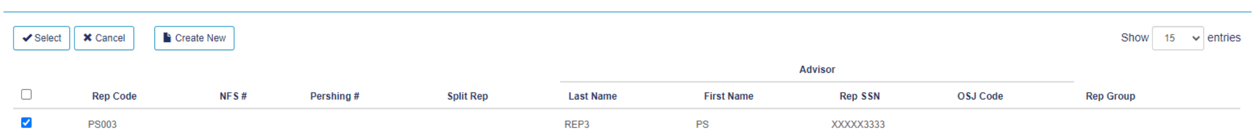
Add as much information available for the subfolder.



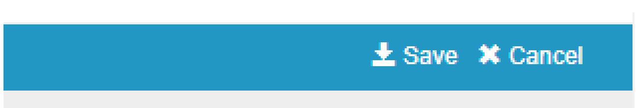
Scroll down and click Add under the Rep Section.



Check the appropriate Rep Code for the subfolder and click Select.



Click Save in the upper right corner.



This is now an existing Client Folder and Subfolder that you can use in any of the Client workflow processes.