

The Folder Instructions Starter Pack

The film ends on one instruction: point Cowork at one folder and write three sentences of folder instructions into it. This is those three sentences written out for you to paste, plus 8 worked folders, 3 global instruction sets, and the test for which of the two any note belongs on.

8 FOLDERS · 3 GLOBAL SETS · IDEASREPAY.COM/ACADEMY/COWORK

WHAT FOLDER INSTRUCTIONS ARE

Folder instructions are a set of standing notes that belong to one folder. Claude reads them before starting any job in that folder, so you stop typing the same three sentences at the top of every session.

In Cowork you edit them in the settings. In Claude Code, the version for programmers, the same idea is a plain text file called Claude.md sitting inside the folder.

WHAT GOES IN THEM, IN FIVE PARTS

- 1 Who the work is for.
- 2 How files should be named.
- 3 What the finished thing looks like.
- 4 What Claude should never do.
- 5 Anything about the material Claude would otherwise have to guess at.

Keep them short. Short, specific, and about this folder rather than about you in general. A page of instructions competes with the actual job for the room Claude has to think in. You are not the only one writing on this card. Claude can add to it while working, so something you explained once during a task is written down and is still there next week.

Start here

Three lines

The film asks for three sentences. This is those three sentences with the blanks left in. Fill them and paste it in, and you have done the thing today rather than the week you get round to it.

The three sentences

Anybody. Start here, today, on one real folder.

This folder is [the work: one client, one report, one project].
Name every file you create like this: [your naming pattern, with a real example].
A finished piece of work here is [what done looks like], and never [the one thing you do not want].

SWAP OUT Fill the four brackets with your own words and paste it in. Three lines beats a blank box, and you can add to it the first time Claude gets something wrong.

Worked examples, by the kind of work

8 folders

Find the one nearest your job, paste it into that folder's instructions, and change the names. None of these is longer than you would say out loud to somebody joining on Monday, which is the length that works.

One client folder

Anybody doing repeat work for the same people.

This folder is all the work for Hartley Joinery. Everything in here is for them and nothing in here is for anybody else.
Name every file client-hartley-YYYY-MM-what-it-is, all lower case, hyphens not spaces, for example client-hartley-2026-08-invoice.
Match the layout and wording of the most recent file of the same kind already in this folder rather than starting a new format.
Their contract and my call notes are in here. Read them before answering anything about scope, rates or dates instead of assuming.
Never send anything, never email anybody and never delete a file.
Write new files and leave the old ones where they are.

SWAP OUT The client name, the naming pattern and the one file you always copy the format from.

Monthly bookkeeping

A bookkeeper or accounts person with the same job every month.

This folder holds the monthly accounts for one client. The bank exports are in /statements and the receipts are in /receipts.
Name everything YYYY-MM-client-document, for example 2026-08-hartley-reconciliation.
A finished month is a reconciliation sheet, a list of anything I need to ask the client about, and a one paragraph summary at the top in plain English.
Every figure you write must be traceable to a line in the statements or a receipt file. If a figure cannot be traced, list it as a query instead of guessing at it.
Never change the original statement or receipt files. Only write new ones.
Amounts are in pounds sterling and the financial year ends in April.

SWAP OUT The folder names, the currency, the year end, and what your finished month actually contains.

Quotes and invoices

A trade or service business sending the same documents over and over.

This folder is quotes and invoices for my business. The last twelve of each are in here and they are the format to follow. Name quotes quote-YYYY-MM-DD-customer and invoices invoice-NNNN-customer, taking the next number in sequence from the highest invoice already in the folder. Copy the layout, the wording and the terms from the most recent invoice exactly. Only the customer, the lines and the totals change. My day rate and materials markup are in rates.txt in this folder. Use those figures and never invent a price. Show the arithmetic for any total you calculate so I can check it before it goes out. Never send anything to a customer. Write the file and stop.

SWAP OUT The naming pattern, the rates file, and whatever your terms actually say.

Writing and content

 Anybody producing words to a house style.

This folder is the blog for my business. Published pieces are in /published and they are the voice to match. Name drafts YYYY-MM-DD-slug, all lower case with hyphens. Read two published pieces before you write anything so the voice matches. Short sentences, plain words, no jargon and no hype. A finished draft is a headline, a first line that states the point, the piece itself, and three suggested headlines at the bottom. Never invent a statistic, a quote or a customer story. If a claim needs a number, leave a marked gap for me to fill. Do not publish anything anywhere. Save the file in this folder.

SWAP OUT The subfolder, the voice rules, and what a finished draft owes you at the bottom.

A report you write every week

Anybody with one recurring document and one audience for it.

This folder is the weekly report for the leadership meeting. Last week's report is the template. Name each one report-YYYY-week-NN. The audience is three people who did not do the work. Lead with what changed and what needs a decision, and put the detail underneath. Keep it to one page. If something will not fit on one page, it goes in an appendix at the bottom rather than lengthening the report. Every number gets the file it came from named beside it. Never guess at a number to fill a row. Write the row and mark it as missing.

SWAP OUT The audience, the length, and the one rule you keep having to repeat about the format.

A research folder

 Anybody gathering material before making a decision.

This folder is research for choosing a new supplier. Notes and saved pages go in here and nothing final lives in here. Name every file topic-source-YYYY-MM-DD. For anything you find on the internet, write the claim, then the page it came from on the next line. A claim with no source does not go in the file. Where two sources disagree, write both and say they disagree rather than picking one. Keep my own notes in this folder separate from what you found online, in two clearly headed sections. Never write a recommendation unless I have asked for one. Gather, do not decide.

SWAP OUT The subject, and whether you want the recommendation or only the material.

Scanned paper and receipts

Anybody whose work arrives as photographs of paper.

This folder is scanned receipts and delivery notes. Most of them are photographs and some of them are poor. Read each one and add a row to expenses.csv with the date, the supplier, the total, the tax, and the file name it came from. Where the photograph is unclear, put the row in queries.csv instead with a note on what you could not read. Never estimate a figure. Round nothing. Copy the total exactly as it appears on the page. Never rename, move or delete the original image files.

SWAP OUT The two output files and the columns you actually need.

Bulk file handling

Anybody with hundreds of files that all need the same thing done.

This folder holds photographs from site visits that need sorting and renaming. Rename each file YYYY-MM-DD-site-NN, taking the date from the file's own timestamp and the site from the subfolder it is in. Before you rename anything, show me the full list of old name to new name and wait for me to say go. Work on a copy in /renamed and leave the originals untouched. Never delete anything, and if two files would end up with the same name, stop and tell me instead of overwriting.

SWAP OUT The naming pattern and the output folder. Run this one on manual approval the first time.

Global instructions: written once, everywhere

3 examples

These go in settings, under Cowork, next to the line that says global instructions. They apply to every session in every folder, so everything in them is about you rather than about one piece of work.

A sole trader

 One person, several kinds of job, no colleagues to explain things to.

I run a small joinery business on my own. I do the quoting, the invoicing and the work. Give me the answer first and the reasoning underneath, and only if I ask for it. Write in plain English. Assume I know my own trade and do not explain it back to me. Keep things short. If something needs to be long, put a three line summary at the top. Money is in pounds sterling and dates are day, month, year.

A bookkeeper

 Somebody whose field has vocabulary they already know.

I am a bookkeeper. I know the accounting terms, so do not define them for me. Never round a figure and never estimate one. If a number cannot be traced to a source, say so instead of filling the gap. Show the arithmetic whenever you calculate something. I want the number I asked for first, then anything I should look at.

Someone who writes for a living

Anybody whose output is words and whose readers are specific.

I write for builders and plumbers who want the price before the explanation.
Short sentences. Plain words. No hype and no marketing language.
Never invent a statistic, a quote or an example. Leave a marked gap instead.
When I ask for options, give me three and say which one you would pick and why.

Which of the two does a note belong on

Ask whether the note would still be true on a completely different job. Your job title is true everywhere. One client's file naming is not.

FOLDER INSTRUCTIONS

- The client, the project or the body of work this folder is for.
- File naming for these files.
- What a finished piece of work looks like here.
- The rules that apply to this material and nothing else.
- What Claude must never do inside this folder.

GLOBAL INSTRUCTIONS

- What you do for a living, so Claude stops explaining your own field back to you.
- How long you want things.
- Whether you want the reasoning or only the answer.
- How you want to be talked to.

The two sets of notes stack rather than compete. The global sheet covers everything, the folder note covers one job, and inside that folder Claude is working to both of them at once.

What not to write

An essay

A page of instructions competes with the actual job for the room Claude has to think in. Short, specific, and about this folder.

A character brief

Three paragraphs about the tone you admire gives Claude less to go on than one sentence saying you write for builders and plumbers who want the price before the explanation.

One job's details on the global sheet

A client's name, a deadline, the format one particular report goes out in. Put those up there and they follow you into every unrelated job you open for the rest of the year.

Notes you never revisit

Claude can add to folder instructions while working, and things change. Read what is in there now and then, the same way you read the memory list.

The rules these blocks follow are the film's. The businesses in them are made up, so change every name before you use one.

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