

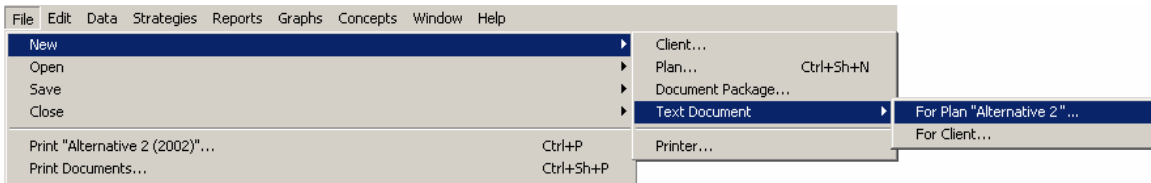
Keep all your client details in one place

Use NaviPlan to keep a record of your meetings with a client, and at the same time document your activities for compliance purposes. You can do all of this electronically by adding notes to your NaviPlan client file. The notes can be either stored with the client file or with a particular plan.

Creating notes

- To create notes for a client, go to the **File** menu, and then select **New – Text Document – For Client**.
- To create notes for a particular plan, select **New – Text Document – For Plan “Plan Name”**. OR, from the *Plan Analysis* window, right-click the plan folder, and then select **Text Document – New**.

In either case, the *New Text Document* dialog box appears for you to enter a unique name for the text document.



After you have named the new document, click **OK**. The word processing application opens for you to enter your notes. When you are finished, click the **X** button in the top right corner of the word processor window. You will be prompted to save the document to the filing cabinet on the desktop.

To minimize the document to an icon on the desktop, click the **minimize** button at the top right corner of the word processor window. When a text document is created for a specific plan, the text document icon is the same colour as the folder of the plan it was based on.

When you exit NaviPlan, the document will be saved along with the client plans.