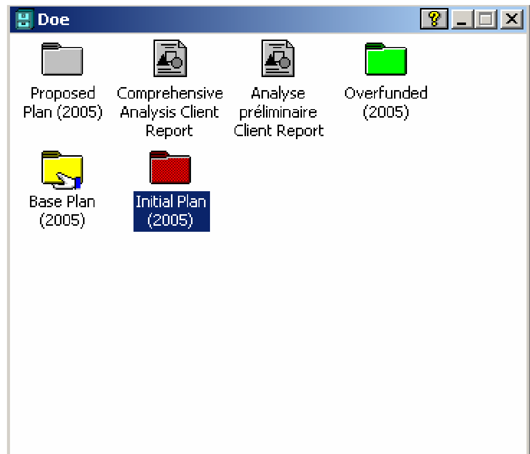
Using the File Cabinet to store client files

Client files do not have to be dragged to the file cabinet to be saved. Client files are automatically saved when you click **OK** to complete the editing of a plan.

When you have duplicate plans and plans spanning multiple years, the desktop can become cluttered. It can then become difficult to ensure you are working with the correct plan.

Duplicate and projected plans not currently in use can be dragged to the file cabinet to keep the desktop clean. This makes it easier to work with the clients’ current plan.



The plans in the file cabinet are then available for future use as needed.