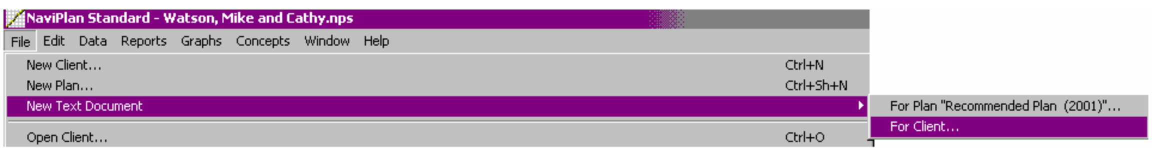
# Keep all your client details in one place

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

To create notes for clients, 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].** 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.

You can also create a new text document for a plan by right-clicking the plan folder, and then selecting **Text Document – New.** In either case, a *New Text Document* dialog box appears where you can enter a unique name for the text document.




After you have selected a text document for either the client or the plan and entered a name, click **OK.** The word processing application opens to a blank document where you can enter your notes. To close the word document, click the **X** in the top-right corner. You are prompted to save the document to the filing cabinet on the desktop, by clicking *Yes.*

To minimize the document to an icon on the desktop, click the **Minimize** button in the top right corner of the Word document. When you exit NaviPlan, the document is saved along with the clients' plans.