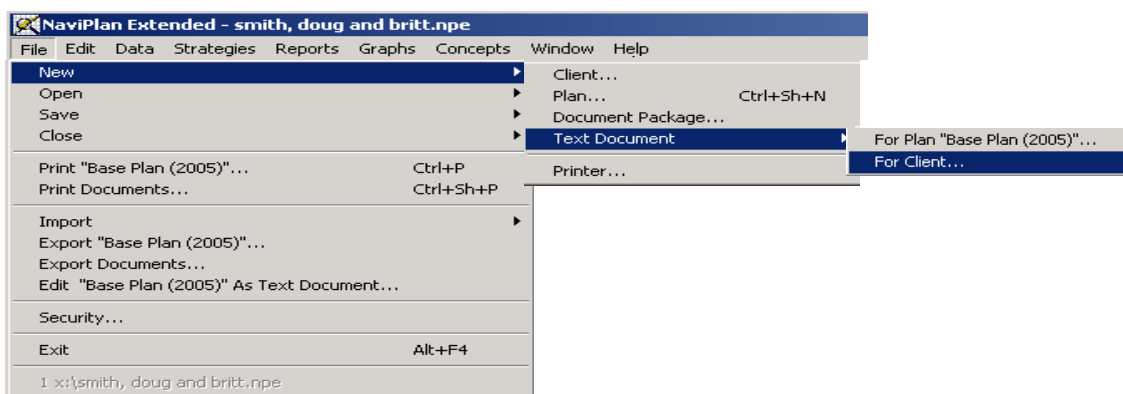


## Keep all your client details in one place

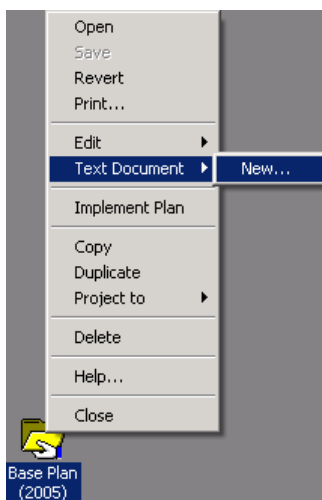
Use NaviPlan Extended to keep a record of your meetings with clients, and at the same time document your activities for compliance purposes. You can do all of this electronically by adding notes to your NPE client files, which are stored with the client or with a particular plan.

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]**. When a text document is created for a specific plan, the text document icon is the same color 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 dialog box opens where you can enter a unique name for the text document. Click **OK**.



The word processing application opens to a new document where you can enter your notes. To close the document, click the close button in the top-right corner of the document. 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 document. When you exit NaviPlan Extended, the document will be saved along with the client plans.