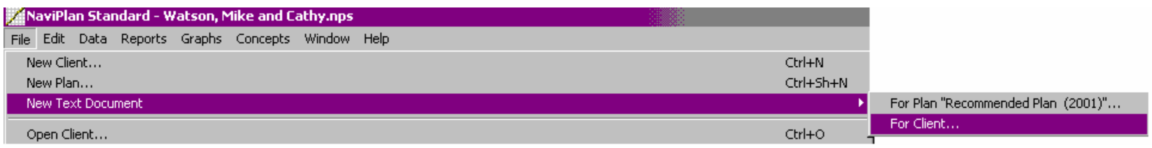
Keep all your client details in one place

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 NPS client file, which are either stored with the clients or stored with a particular plan.

To create notes for a client, go to the **File** menu, and 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 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. Microsoft Word opens to a blank document where you can enter your notes. To close the document, click the close 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 in the top right corner of the Word document. When you exit NaviPlan, the document is saved along with the clients' plans.