**Saving Financial Planning Client Computer Files**

**Real World Personal Finance Software**

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## Procedure for Saving Computer Generated Documents for Clients

First, make a new folder under your C: root directory, called “Data.” Then make one called “EData.”

Data is where you store everything except Excel spreadsheets, and EData is were you store only spreadsheets.

Using Windows Explorer, find and click on (C:). It may be under My Computer, and then Local Drive C:

Then under the File menu, select, “New.” Then select “Folder.” Then type in Data and then EData. It works better under the root folder than some other place used for other things, like My Documents.

Next, repeat this step and make a new folder called “Clients” under both Data and EData.

Now under the Clients folders, make a folder using each client’s last name.

**For Word documents:**

1) When you’re ready to save a Word document you’ve made for a client, use the “File” menu and select the

“Save As” command. On your hard drive, there is a now folder (directory) named “Data.” This should be the

main directory Word defaults to when you use the “Save As” command.

Ensure it’s the default location by going to, Tools, Options, File Locations. Highlight Documents, and click

Modify to find and select it. Repeat this process in Excel.

2) Underneath the Data folder, there is a folder called “Clients.” Select that folder.

3) Underneath this main directory, there are numerous folders (AKA subdirectorys) with client names.

4) Choose the client’s name and save the file under that particular client’s folder.

5) If the client does not yet have a folder, then make one using the “New Folder” Icon on top of the “Save

As” dialog boxes. After you’ve made the new folder with the client’s name on it, select that folder, then save

The file as explained above.

**For Excel spreadsheets:**

Use the same steps as above, but instead of the main directory being “Data” it’s “EData.”

More personal computer tips can be found here: <http://www.toolsformoney.com/free_pc_tips.htm>