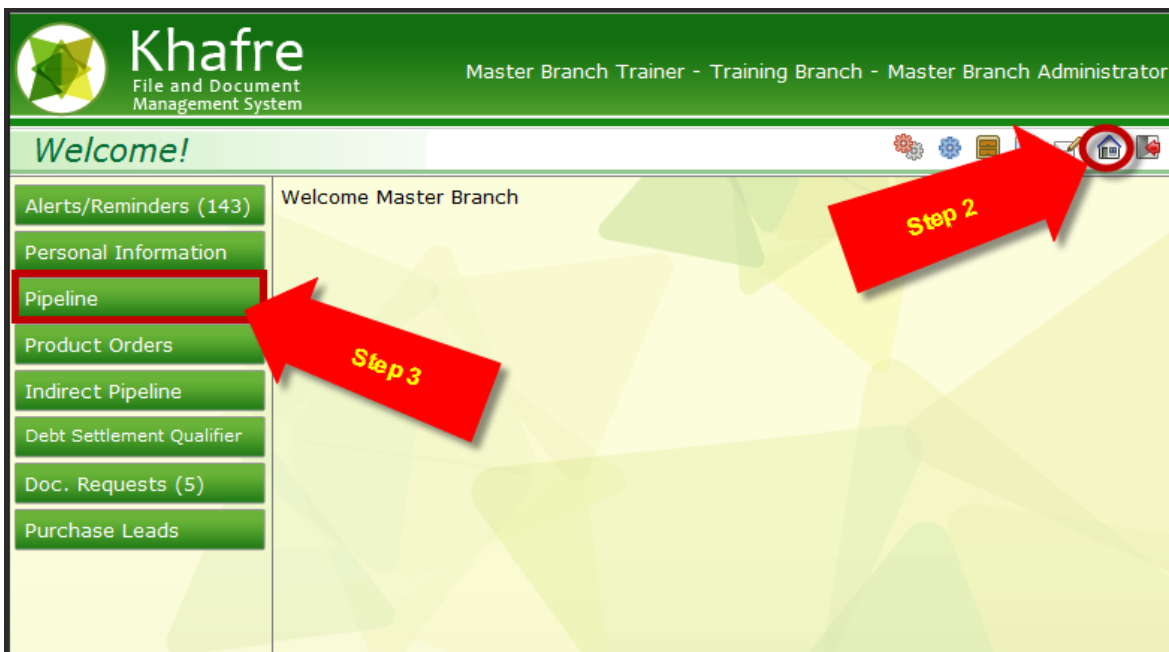


How To Make a Note in a Client File Visible to the Client

1. Log in to Khafre at <http://www.khafreonline.com/app>

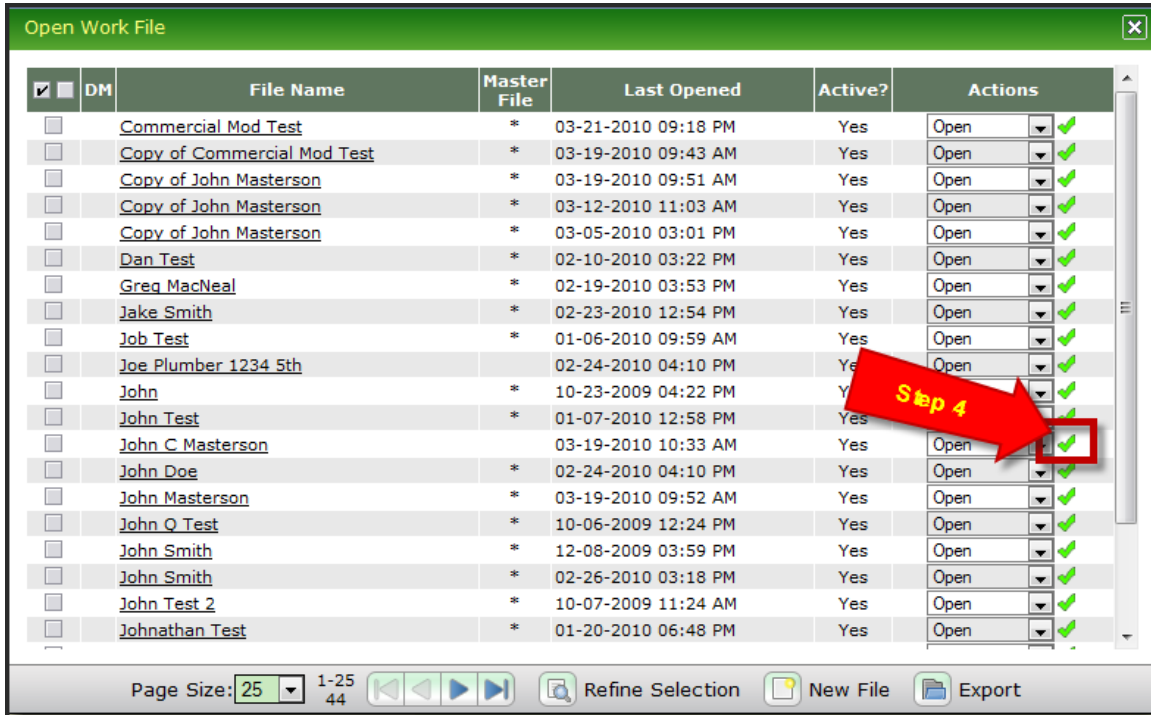


2. Click the home icon in the upper right corner of the screen
 - The Welcome! screen displays



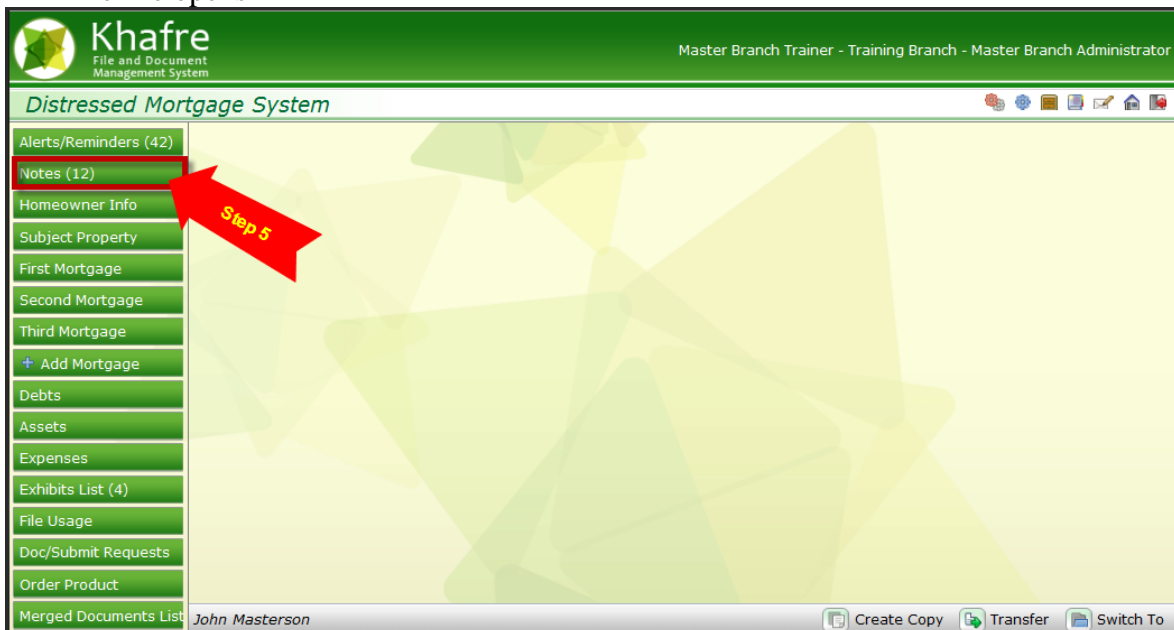
3. Click the Pipeline tab in the left-hand navigation menu

- The Open Work File dialog box displays



4. Click the green check to the right of the file you wish to open

- The file opens



5. Click the Notes tab in the left hand navigation menu

- The Notes dialog box displays

New	Ext.	Date/Time	Author	Note Type	Text	From	Actions
*		03-30-2010 11:41 AM	n/a	Generic Note	Hey what is the status of the Workout	Training Branch	Open <input type="checkbox"/>
		03-30-2010 11:38 AM	Master Branch Trainer	Generic Note	Hey thanks	Training Branch	Open <input type="checkbox"/>
		03-30-2010 11:37 AM	Master Branch Trainer	Generic Note	Here is a new note regarding this file	Training Branch	Open <input checked="" type="checkbox"/>
*		03-05-2010 02:33 PM	Master Branch Trainer	Generic Note	test	Training Branch	Open <input type="checkbox"/>
*	*	03-03-2010 02:37 PM	n/a	Generic Note	Hey Thank for the help	Training Branch	Open <input type="checkbox"/>
*	*	02-26-2010 02:51 PM	Master Branch Trainer	Generic Note	Need Credit card statement for Visa June	Training Branch	Open <input type="checkbox"/>
*	*	02-24-2010 03:49 PM	n/a	Generic Note	Hey whats my status	Training Branch	Open <input type="checkbox"/>
		02-11-2010 12:26 PM	Master Branch Trainer	Generic Note		Training Branch	Open <input type="checkbox"/>
*		02-10-2010 03:51 PM	Master Branch Trainer	Generic Note	Hey	Training Branch	Open <input type="checkbox"/>
		02-05-2010 11:04 AM	Master Branch Trainer	Generic Note	Do not view for client	Training Branch	Open <input type="checkbox"/>
*		02-05-2010 10:57 AM	n/a	Generic Note	Hey New Note	Training Branch	Open <input type="checkbox"/>
		01-20-2010 05:39 PM	n/a	Generic Note	Put Note here for Lance	Training Branch	Open <input type="checkbox"/>
*		01-18-2010 03:05 PM	Master Branch Trainer	Generic Note	Hey B Of A settled 20%	Training Branch	Open <input type="checkbox"/>
*	*	01-18-2010 02:29 PM	n/a	Generic Note	Testing note	Training Branch	Open <input type="checkbox"/>

Page Size: 25 1-25 82 New View All Notes

- Click the green check to the right of the note you wish to update

- The Note displays

Generic Note - 03-30-2010 11:37 AM

Note Author: Master Branch Trainer

Note Type: Generic Note

Client Viewable?: Yes No

Here is a new note regarding this file

OK Reply

- Change the Client Viewable Yes/No radio button to "Yes"
- Click the OK button