



TOTAL Online

EASY MONEY

GOLDEN YEARS

Setup Guide

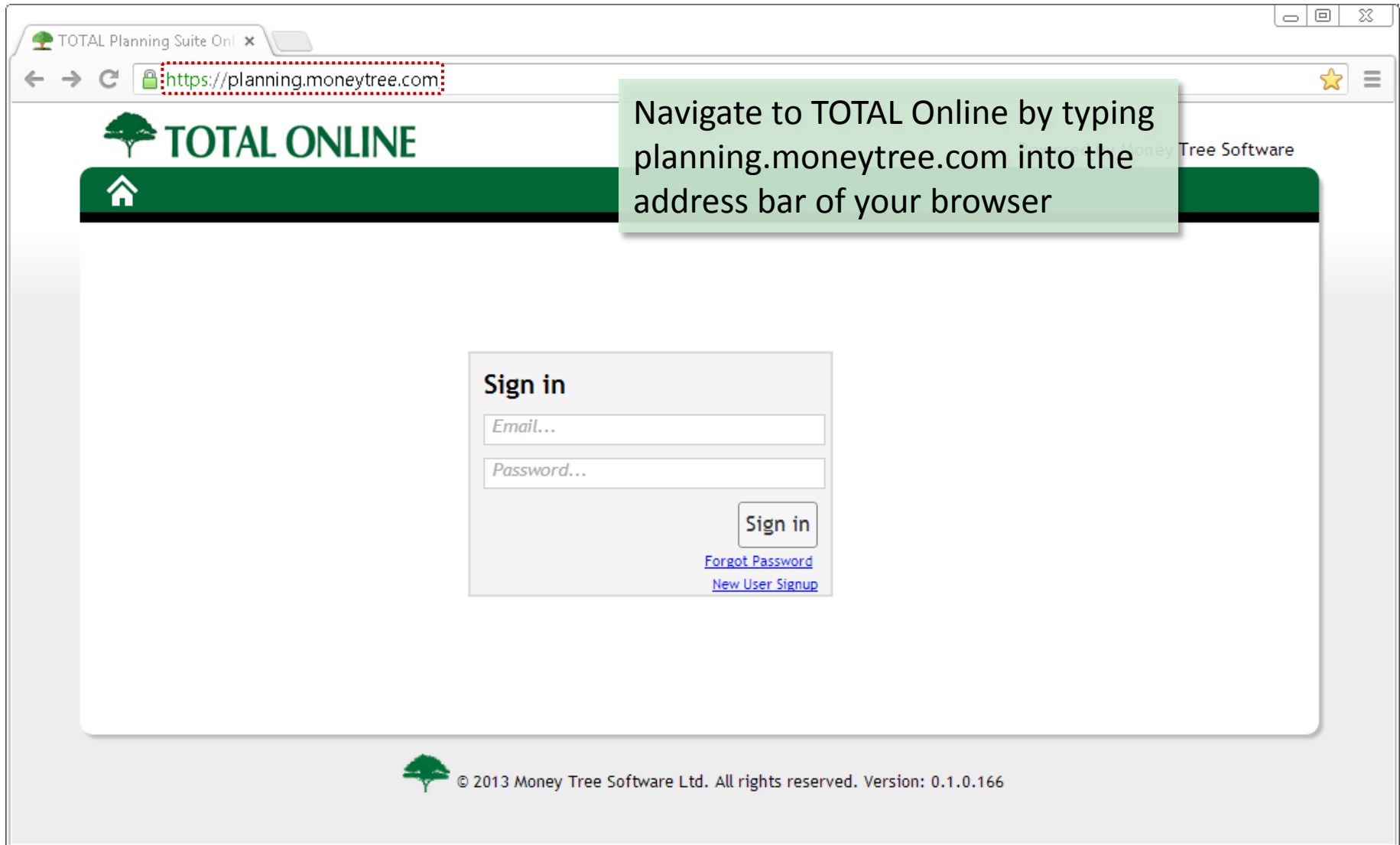
Converting from Desktop to Online Edition

Your Step-by-Step Guide

Convert to TOTAL Online in 6 easy steps

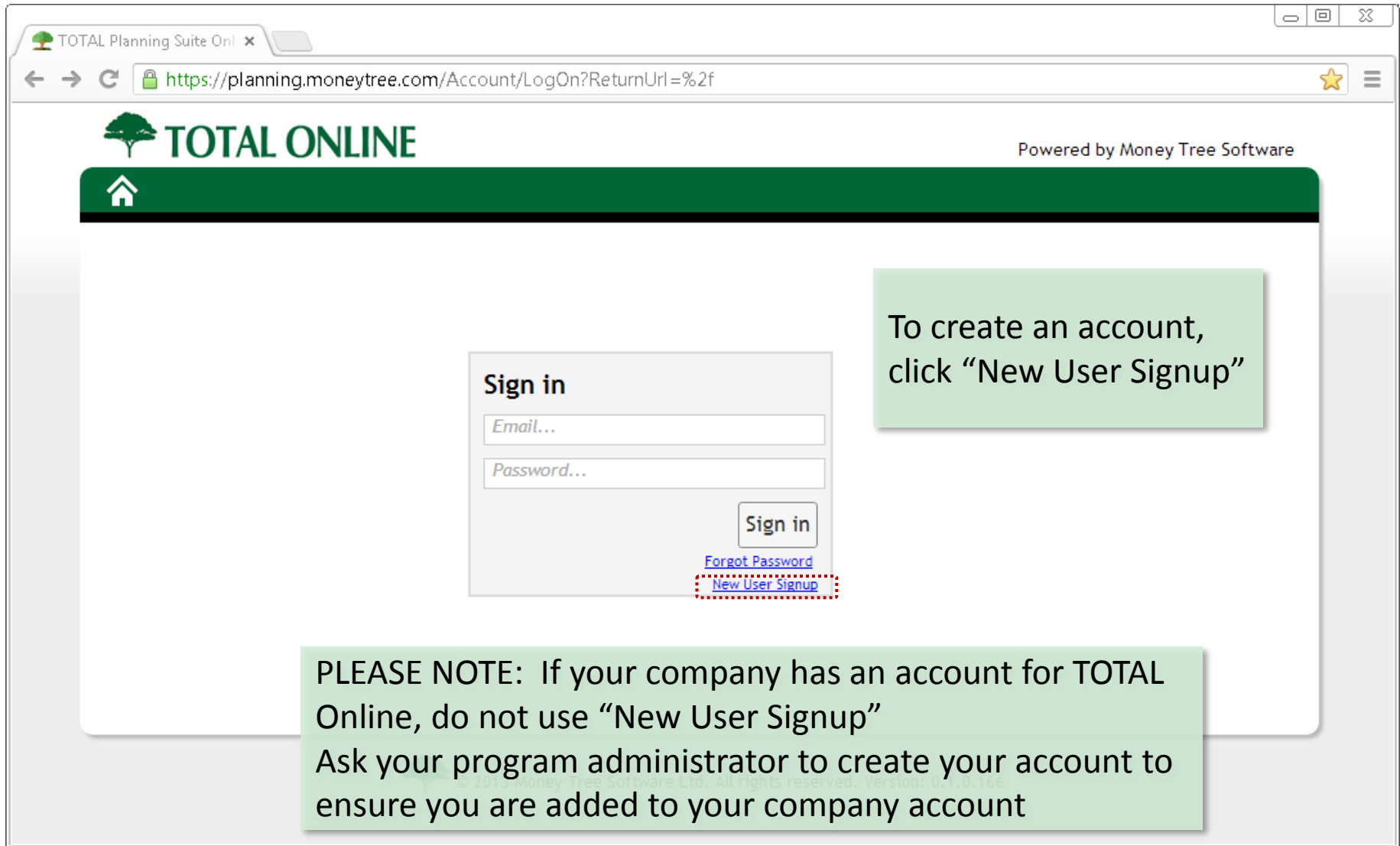
1. Create a TOTAL Online Account
2. Define Users, Roles and Style Settings
3. Upload and Convert Client Database
4. Review Database Conversion Stats
5. Review Settings
6. Import Custom Reports

Step 1 Create a TOTAL Online Account



The screenshot shows a web browser window with the address bar containing <https://planning.moneytree.com>. The page header features the "TOTAL ONLINE" logo and a home icon. A central sign-in form includes fields for "Email..." and "Password...", a "Sign in" button, and links for "Forgot Password" and "New User Signup". A green callout box with white text is overlaid on the page, stating: "Navigate to TOTAL Online by typing planning.moneytree.com into the address bar of your browser". The footer contains the Money Tree Software logo, copyright information for 2013, and the version number 0.1.0.166.

Step 1 Create a TOTAL Online Account



The screenshot shows a web browser window with the URL <https://planning.moneytree.com/Account/LogOn?ReturnUrl=%2f>. The page header includes the "TOTAL ONLINE" logo and "Powered by Money Tree Software". A green navigation bar contains a home icon. The main content area features a "Sign in" form with fields for "Email..." and "Password...", a "Sign in" button, and links for "Forgot Password" and "New User Signup". The "New User Signup" link is highlighted with a red dashed box. A green callout box on the right states: "To create an account, click 'New User Signup'". A larger green callout box at the bottom contains the text: "PLEASE NOTE: If your company has an account for TOTAL Online, do not use 'New User Signup' Ask your program administrator to create your account to ensure you are added to your company account".

Step 1 Create a TOTAL Online Account

NEW User Signup

https://planning.moneytree.com/Account/NewUserSignup

TOTAL ONLINE Powered by Money Tree Software

Free Trial Version of TOTAL Online

TOTAL Online's highly flexible input platform combines Easy Money Power Planners in-depth accumulation phase planning and Golden Years Cash Flow detailed distribution phase planning.

- 30 day free trial
- Full version
- Unlimited support

User Information

First Name
Last Name
Job Title
Company
Email
Phone
Address
City
State
Zip
How did you hear about us? -Choose One-
Broker/Dealer

Sign In Information

Username
Password
Confirm Password

Sign Up

All fields are required.

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Fill the form to create your user account

Your username is your email address

Password are required to be at least 8 characters, and include an uppercase letter and number

Step 1 Create a TOTAL Online Account

The screenshot shows a web browser window with the URL <https://planning.moneytree.com/Account/LogOn?ReturnUrl=%2f>. The page header features the "TOTAL ONLINE" logo and the text "Powered by Money Tree Software". A dark green navigation bar contains a home icon. The main content area displays a "Sign in" form with two input fields: "Email..." and "Password...". A red dotted box highlights these two fields. Below the fields is a "Sign in" button, a [Forgot Password](#) link, and a [New User Signup](#) link. To the right of the form, a light green callout box contains the text: "After you have an account, sign in with your email and password". The footer includes a small tree icon, the copyright notice "© 2013 Money Tree Software Ltd. All rights reserved. Version: 0.1.0.166", and the text "moneytree.com".

Step 1 Create a TOTAL Online Account

The screenshot shows a web browser window with the URL <https://planning.moneytree.com/Account/LogOn?ReturnUrl=%2f>. The page header includes the "TOTAL ONLINE" logo and "Powered by Money Tree Software". A green navigation bar contains a home icon. The main content area features a "Sign in" form with two input fields: one for the email address (containing "johnsmith@exampleco.com") and one for the password (containing "*****"). A "Sign in" button is located below the password field. Two callout boxes provide additional information: one on the right states "Remember, your username is your email address", and one on the left states "And the password is required to have at least 8 characters, and include an uppercase letter and number". Below the form are links for "Forgot Password" and "New User Signup". The footer contains the Money Tree logo, copyright notice "© 2013 Money Tree Software Ltd. All rights reserved. Version: 0.1.0.166", and the Money Tree logo.

Remember, your username is your email address

And the password is required to have at least 8 characters, and include an uppercase letter and number

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STEP 1 COMPLETE

Welcome

https://planning.moneytree.com

TOTAL ONLINE

Powered by Money Tree Software

Welcome John! | Log Off | Help

Home
Clients
Settings
Help
Administration

Welcome John

License expires: Mar 4, 2015

Jump start your planning with TOTAL Online by exploring program guides and getting started videos.

For TOTAL Planning Suite 5.0 customers making the switch to TOTAL Online, follow the step-by-step setup guide to transfer your client database, settings and custom reports.

Get help with questions by calling toll free 877-421-9815 M-F 6:30 am - 5:00 pm PT.

TOTAL Online Program Guides

Getting Started Videos

Desktop to Online Setup Guide

You have successfully created an account and logged into TOTAL Online

After signing in, you arrive on TOTAL Online's home page

Moving on to step 2!

Step 2 Define Users, Roles & Style Settings

Welcome

https://planning.moneytree.com

TOTAL ONLINE Powered by Money Tree Software

Welcome John! | Log Off | Help

Home ▾
Clients
Settings
Help
Administration

Last Logged In: Wed, Apr 24 2013, 8:44 AM

Welcome John

License expires: Mar 4, 2015

Jump to: [Home](#) | [Clients](#) | [Settings](#) | [Help](#) | [Administration](#)

For more information on making the switch to TOTAL Online, follow the step-by-step setup guide to transfer your client database, settings and custom reports.

Contact our support team with questions by calling toll free 877-421-9815 M-F 6:30 am - 5:00 pm PT.

TOTAL Online Program Guides Getting Started Videos Desktop to Online Setup Guide

Note: If you do not have administration on the left hand menu, your company administrator will complete this step of the setup

Step 2 Define Users, Roles & Style Settings

The screenshot shows the TOTAL ONLINE Administration interface. The browser address bar displays <https://planning.moneytree.com/>. The page title is "TOTAL ONLINE" and it is powered by Money Tree Software. The navigation bar includes "Home", "Administration", "Welcome John! | Log Off | Help". The "Administration" section is active, and the "Users" tab is selected. The "User Administration" section contains three buttons: "Add User", "Edit User", and "Delete User". A table lists users with columns for First Name, Last Name, Email, Admin, and Disabled. The table contains two rows: James Wallace (james@exampleco.c...) and John Smith (johnsmith@example...). The "Admin" checkbox is checked for John Smith.

The first tab under Administration is Users

Users can be added up to the maximum number of licenses available

Only users set as administrators have access to the administration section

First Name	Last Name	Email	Admin	Disabled
James	Wallace	james@exampleco.c...	<input type="checkbox"/>	<input type="checkbox"/>
John	Smith	johnsmith@example...	<input checked="" type="checkbox"/>	<input type="checkbox"/>

All users with a company should be added here to allow for data administration and collaboration based on user roles

Step 2 Define Users, Roles & Style Settings

The screenshot shows the 'Roles' tab selected in the 'Administration' section. The interface includes a navigation menu on the left with 'Administration' highlighted. The main content area has tabs for 'Users', 'Roles', 'Style Settings', and 'Import Database'. The 'Roles' tab is active, displaying 'Role Administration' with three buttons: 'Add Role', 'Edit Role', and 'Delete Role'. Below these buttons is a table listing roles.

Title	Description
Advisor	Advisor as defined by Money Tree Software.
Paraplanner	Paraplanner as defined by Money Tree Software.
Assistant	Assistant as defined by Money Tree Software.
View/Edit ONLY	User can view and edit client information only.

The second tab under Administration is Roles

You can define specific permissions and abilities by creating roles

Assign a role by going to the Users tab by clicking Edit User

Step 2 Define Users, Roles & Style Settings

The screenshot shows a web browser window with the URL `https://planning.moneytree.com/Ad`. The page title is "Style Settings". The main header is green with the "TOTAL ONLINE" logo and text "Administration" and "Welcome John! | Log Off | Help". Below the header, there are tabs for "Users", "Roles", "Style Settings", and "Import Database". The "Style Settings" tab is active, showing a "Customize Website" section with a "Browse..." button, a logo, and a "Color Scheme" dropdown set to "Money Tree Green".

The third tab under Administration is Style Settings

The logo will be resized to a height of 45 pixels

Browse to select your logo to display on the top left of your TOTAL Online site

Pick your preferred color scheme

`javascript:LinkAction("/Administration/StyleSettings");`

STEP 2 COMPLETE

The screenshot shows a web browser window with the URL <https://planning.moneytree.com/Admin>. The page title is "TOTAL ONLINE" and the navigation bar includes "Administration", "Welcome John!", "Log Off", and "Help". The main content area has tabs for "Users", "Roles", "Style Settings", and "Import Database". The "Import Database" tab is active, displaying the heading "Import a TPS Desktop Database" and a "Select Database File" button. A green callout box in the upper right of the browser window states: "You have completed setting up the users, roles and style settings for your site." A second green callout box in the lower center of the browser window states: "The last tab in Administration is for importing a TOTAL Planning Suite database – which takes us to step 3!". The browser's status bar at the bottom shows the JavaScript code: `javascript:LinkAction('/Administration/Import');`

Step 3 Upload and Covert Client Database

The screenshot shows a web browser window with the URL <https://planning.moneytree.com>. The page title is "TOTAL ONLINE" and the sub-header is "Administration". The user is logged in as "John!". The main navigation menu includes "Home", "Clients", "Settings", "Help", and "Administration". The "Import Database" section is active, showing a "Select Database File" button and a table with columns "Description" and "Progress".

Import Database from the Administration section allows you to upload and covert your TOTAL Planning Suite 5.0 database

The easiest way to locate your TOTAL Planning Suite 5.0 database is by opening TOTAL Planning Suite 5.0.

javascript:LinkAction('/Administration/Import');

Step 3 Upload and Covert Client Database

Import

https://planning.moneytree.com/Administration/Import

TOTAL ONLINE Powered by Money Tree Software

Administration Welcome John! | Log Off | Help

Home
Clients
Settings
Help
Administration ▶

Users Roles Style Settings Import Database

Import a TPS Desktop Database

Select Database File

Description	Progress
-------------	----------

The easiest way to locate your TOTAL Planning Suite 5.0 database is by opening TOTAL Planning Suite 5.0.

javascript:LinkAction('/Administration/Import');

Step 3 Upload and Covert Client Database

file:///c:/users/carolynr/documents/money tree software/total planning suite/clientdatabase.vdb4

File Tools Report Selection Help

New Client Open Client Client Tasks

Client List

Clients

New Client Open Client Refresh Clients Client Tasks

Last Name	First Name	Home Phone	Cell Phone	Work Phone	Last Updated	Email Address
					8/6/2013	
> Abbett	Allen	888-123-4567		204-2070	8/6/2013	
Education						
Fern	Donald				8/7/2013	
Franklin	Freddy				1/14/2013	

Make sure to close TOTAL Planning Suite before continuing the database import

Step 3 Upload and Covert Client Database

Import

https://planning.moneytree.com/Administration/Import

TOTAL ONLINE Powered by Money Tree Software

Administration Welcome John! | Log Off | Help

Home
Clients
Settings
Help
Administration ▶

Users Roles Style Settings **Import Database**

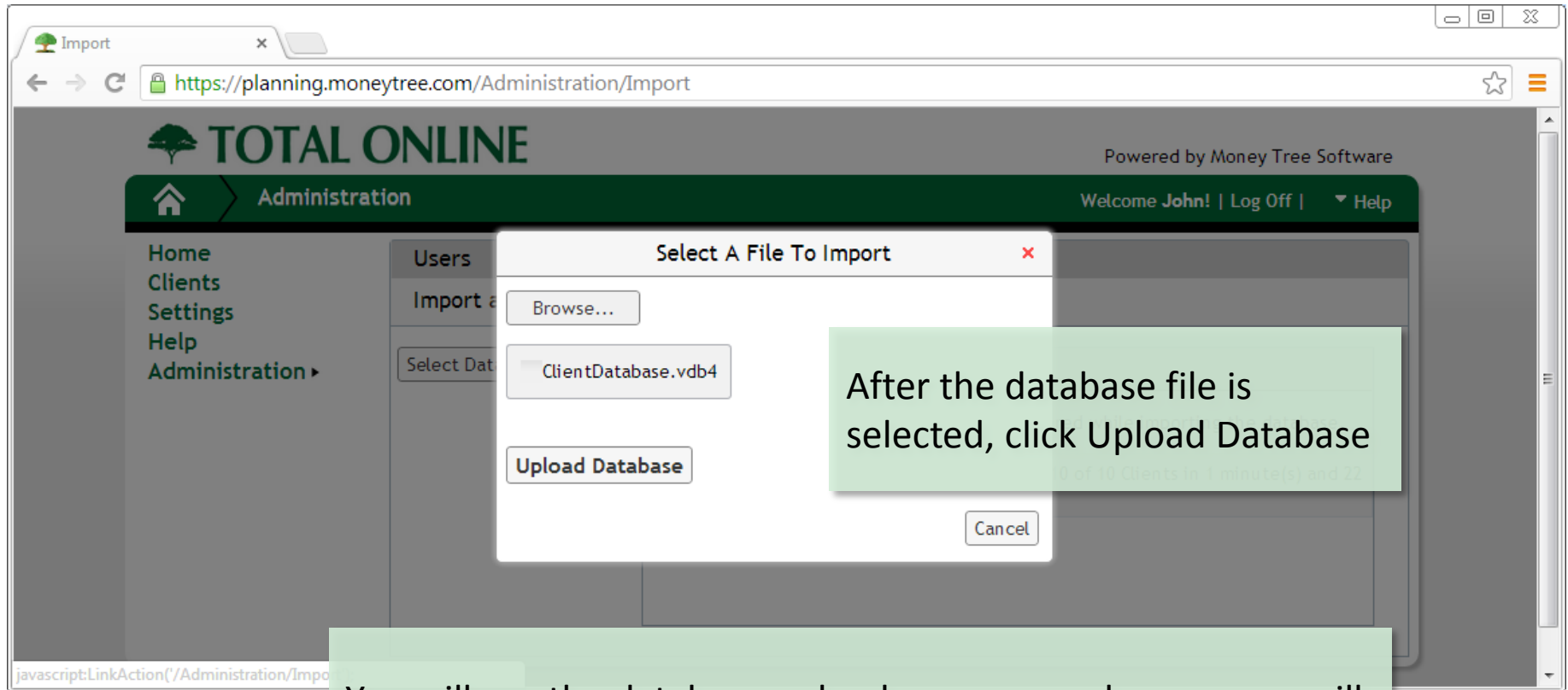
Import a TPS Desktop Database

Select Database File Description Progress

Click Select Database File and browse to the database location you wrote down from TOTAL Planning Suite 5.0

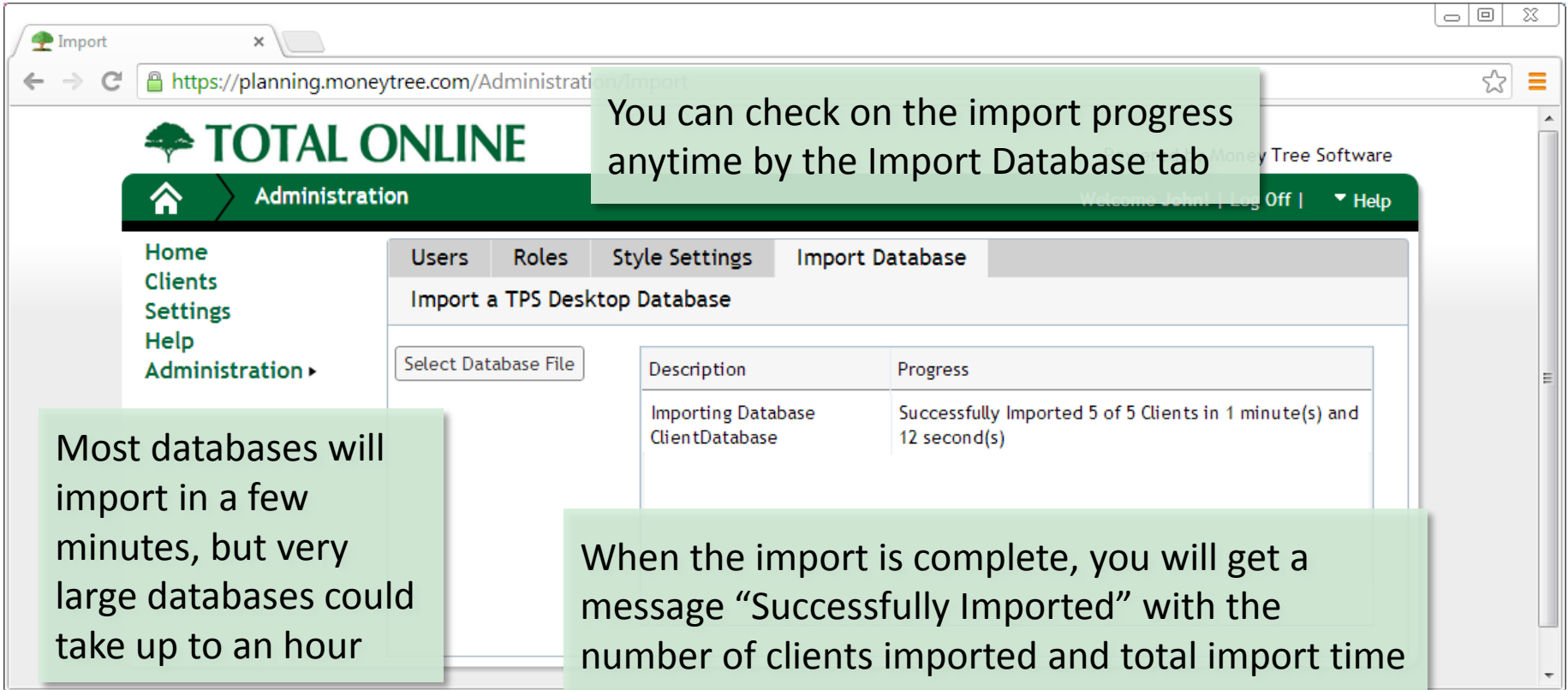
javascript:LinkAction('/Administration/Import');

Step 3 Upload and Covert Client Database



You will see the database upload progress and a message will display when the database has been successfully uploaded

STEP 3 COMPLETE



You can check on the import progress anytime by the Import Database tab

Most databases will import in a few minutes, but very large databases could take up to an hour

Description	Progress
Importing Database ClientDatabase	Successfully Imported 5 of 5 Clients in 1 minute(s) and 12 second(s)

When the import is complete, you will get a message "Successfully Imported" with the number of clients imported and total import time

You are done with Step 3!

Step 4 Review Database Conversion Stats

The screenshot shows the 'Import' page in the TOTAL ONLINE Administration interface. A green callout box at the top right says: 'Review the import message to ensure there are no errors and all clients have been imported'. Below this, a progress table shows: 'Importing Database ClientDatabase' with 'Progress: Successfully Imported: 5 of 5 Clients in 1 minute(s) and 12 second(s)'. A red dashed box highlights '5 of 5 Clients'. On the left, another green callout box says: 'Compare the total number of clients listed on the import database tab to the number in TOTAL Planning Suite 5.0'. Below the progress table is a 'Clients' table with columns: Last Name, First Name, Home Phone, Cell Phone, Work Phone, Last Updated, and Email Address. The table lists five clients: Abbett, Education, Fern, and Franklin. A red dashed box at the bottom of the client list highlights '5 Clients'.

Description	Progress
Importing Database ClientDatabase	Successfully Imported: 5 of 5 Clients in 1 minute(s) and 12 second(s)

Last Name	First Name	Home Phone	Cell Phone	Work Phone	Last Updated	Email Address
					8/6/2013	
> Abbett	Allen	555-123-4567		234-5678	8/8/2013	
Education	Client				8/7/2013	
Fern	Donald				8/7/2013	
Franklin	Freddy				1/14/2013	

Step 4 Review Database Conversion Stats

We recommend you choose a few client files and run Easy Money or Golden Years reports in both the desktop and online edition to ensure you get the same results

Retirement Capital Estimate

Age	Annual Expenses	Income available Other expenses				Annual Surplus (shortage)	Annual Deposits	Return on Assets	Tax Due Each Year 25.00%	Total Acct Value (end of year)
		Pension & Min. Dist.	Scheduled Dist.	Social Security	Other Inc/Exp					
59	(\$4,116,097)	\$3,274,626	\$0	\$1,572,781	\$0	\$87,348	\$44,844	(\$1,081)	25.00%	\$305,419
60						29,107	49,459	(1,110)	25.00%	850,876
61						29,981	54,425	(1,139)	25.00%	964,142
62	(112,183)	26,568		24,877	(61,228)		53,513	(821)	25.00%	955,507
63	(64,733)	27,099		24,874	(12,759)		55,243	(606)	25.00%	997,385
64	(66,735)	27,641		25,372	(13,712)		58,012	(506)	25.00%	1,041,171
65	(68,800)	28,194		25,879	(14,717)		60,929	(395)	25.00%	1,086,980
66	(70,931)	28,758		33,289	(8,884)		64,111	(300)	25.00%	1,141,907
67	(73,130)	29,333		33,955	(9,842)		67,591	(227)	25.00%	1,199,430
68	(75,399)	29,920		34,634	(10,845)		71,255	(142)	25.00%	1,259,699
69	(77,740)	30,518		35,326	(11,895)		75,090	(333)	25.00%	1,322,562
70	(80,155)	31,129		36,039	(12,993)		78,779	(433)	25.00%	1,384,018
71	(82,647)	31,754		36,754	(14,144)		81,881	(79)	25.00%	1,439,411
72	(85,219)	32,392		37,480	(15,348)		84,779	(74)	25.00%	1,488,460
73	(87,872)	33,043		38,238	(16,606)		87,660		25.00%	1,539,119
74	(90,609)	33,707		39,023	(17,919)		90,522		25.00%	1,590,919
75	(93,433)	34,384		39,833	(19,287)		93,450		25.00%	1,643,890
76	(96,348)	35,074		40,667	(20,710)		96,343		25.00%	1,697,961
77	(99,355)	35,776		41,525	(22,188)		99,291		25.00%	1,753,072
78	(102,457)	36,491		42,408	(23,721)		102,079		25.00%	1,809,263
79	(105,658)	37,218		43,316	(25,309)		104,909		25.00%	1,866,474
80	(108,961)	37,958		44,248	(26,952)		107,689		25.00%	1,924,735
81	(112,369)	38,711		45,204	(28,650)		110,489		25.00%	1,984,076
82	(115,885)	39,477		46,184	(30,403)		113,117		25.00%	2,044,527
83	(119,513)	40,256		47,188	(32,211)		115,720		25.00%	2,106,118
84	(123,257)	41,048		48,217	(34,074)		118,232		25.00%	2,168,889
85	(127,119)	41,853		49,270	(35,992)		120,649		25.00%	2,232,870
86	(131,100)	42,671		50,348	(37,965)		122,968		25.00%	2,298,091
87	(135,217)	43,502		51,451	(39,994)		125,182		25.00%	2,364,582
88	(139,460)	44,346		52,579	(42,068)		127,232		25.00%	2,432,373
89	(143,837)	45,203		53,732	(44,197)		129,156		25.00%	2,501,496
90	(148,349)	46,073		54,901	(46,371)		130,988		25.00%	2,571,981
91	(152,997)	46,956		56,085	(48,590)		132,759		25.00%	2,643,858
92	(157,782)	47,852		57,284	(50,854)		134,489		25.00%	2,717,167
93	(162,705)	48,761		58,508	(53,163)		136,177		25.00%	2,791,940
94	(167,868)	49,682		59,757	(55,517)		137,823		25.00%	2,868,207
95		50,625		61,031	(57,916)		139,427		25.00%	2,945,998
96		51,479		62,330	(60,360)		141,000		25.00%	3,025,343
97		52,354		63,654	(62,849)		142,541		25.00%	3,106,274
98		53,249		65,003	(65,383)		144,051		25.00%	3,188,731
99		54,164		66,377	(67,962)		145,529		25.00%	3,272,754
100		55,100		67,775	(70,586)		146,975		25.00%	3,358,384

Note: All incomes/expenses are represented in after-tax values with the exception of Social Security. Tax rate on income and interest is 25.00% before retirement, 25.00% after. Dividend and Capital Gain taxed at 15.00% before retirement and 15.00% after.

If the values do not match exactly, move on to Step 5 – its likely a difference in the settings section – but circle back here after step 5

Check the starting year account value and the final year account value on the Retirement Capital Estimate in Easy Money or Golden Years

Step 5 Review Settings

Welcome

https://planning.moneytree.com

TOTAL ONLINE Powered by Money Tree Software

Welcome **John!** | Log Off | Help

Home ▶
Clients
Settings
Help
Administration

Last Logged In: Wed, Apr 24 2013, 8:44 AM

TOTAL Online settings are SHARED between all users in the company

Jump start your planning with TOTAL Online by exploring program guides and getting started videos.

For TOTAL Planning Suite 5.0 customers making the switch to TOTAL Online, follow the step-by-step setup guide to transfer your client database, settings and custom reports.

Contact our support team with questions by calling to 1.877.421.9815

TOTAL Online Program Guides

Getting Started Videos

This is different than TOTAL Planning Suite 5.0, where each user had separate settings even with a shared company database

Step 5 Review Settings

The screenshot shows the TOTAL ONLINE web application interface. The browser address bar displays <https://planning.moneytree.com>. The page header includes the TOTAL ONLINE logo and the text "Powered by Money Tree Software". A navigation bar shows "Welcome John! | Log Off | Help". A sidebar menu on the left lists "Home", "Clients", "Settings", "Help", and "Administration". The main content area features a "Welcome John!" message, the last login time "Last Logged In: Wed, Apr 24 2013, 8:44 AM", and a "Desktop to Online Setup Guide" link with a circular icon. Two green callout boxes are overlaid on the page:

When you import a TOTAL Planning Suite 5.0 database, the import will populate TOTAL Online's settings

If you had a shared TOTAL Planning Suite 5.0 database with multiple users, the import will populate TOTAL Online's settings based on the settings of the user who imports the database to TOTAL Online

Step 5 Review Settings

The screenshot shows the TOTAL ONLINE web application interface. The browser address bar displays <https://planning.moneytree.com>. The page header includes the TOTAL ONLINE logo, a home icon, and user information: "Welcome John! | Log Off | Help". A navigation menu on the left lists "Home", "Clients", "Settings" (highlighted with a red dashed box), "Help", and "Administration". The main content area features a green callout box stating: "As a company, review the settings section". Below this, a smaller green callout box reads: "Work with other advisors in your company to review the settings and make sure they are set to the most common values for your planning assumptions". At the bottom, three buttons are visible: "TOTAL Online Program Guides", "Getting Started Videos" (with a play button icon), and "Desktop to Online Setup Guide" (with a document icon). A final green callout box at the bottom left instructs: "Click the HOME button to return to TOTAL Online's home page and view the full program menu, then click Settings".

Welcome

https://planning.moneytree.com

TOTAL ONLINE Powered by Money Tree Software

Welcome **John!** | Log Off | Help

Home ▶
Clients
Settings
Help
Administration

Last Logged In: Wed, Apr 24 2013, 8:44 AM

As a company, review the settings section

License expires: Mar 4, 2015

Jump start your planning with TOTAL Online by exploring program guides and getting started videos.

Work with other advisors in your company to review the settings and make sure they are set to the most common values for your planning assumptions

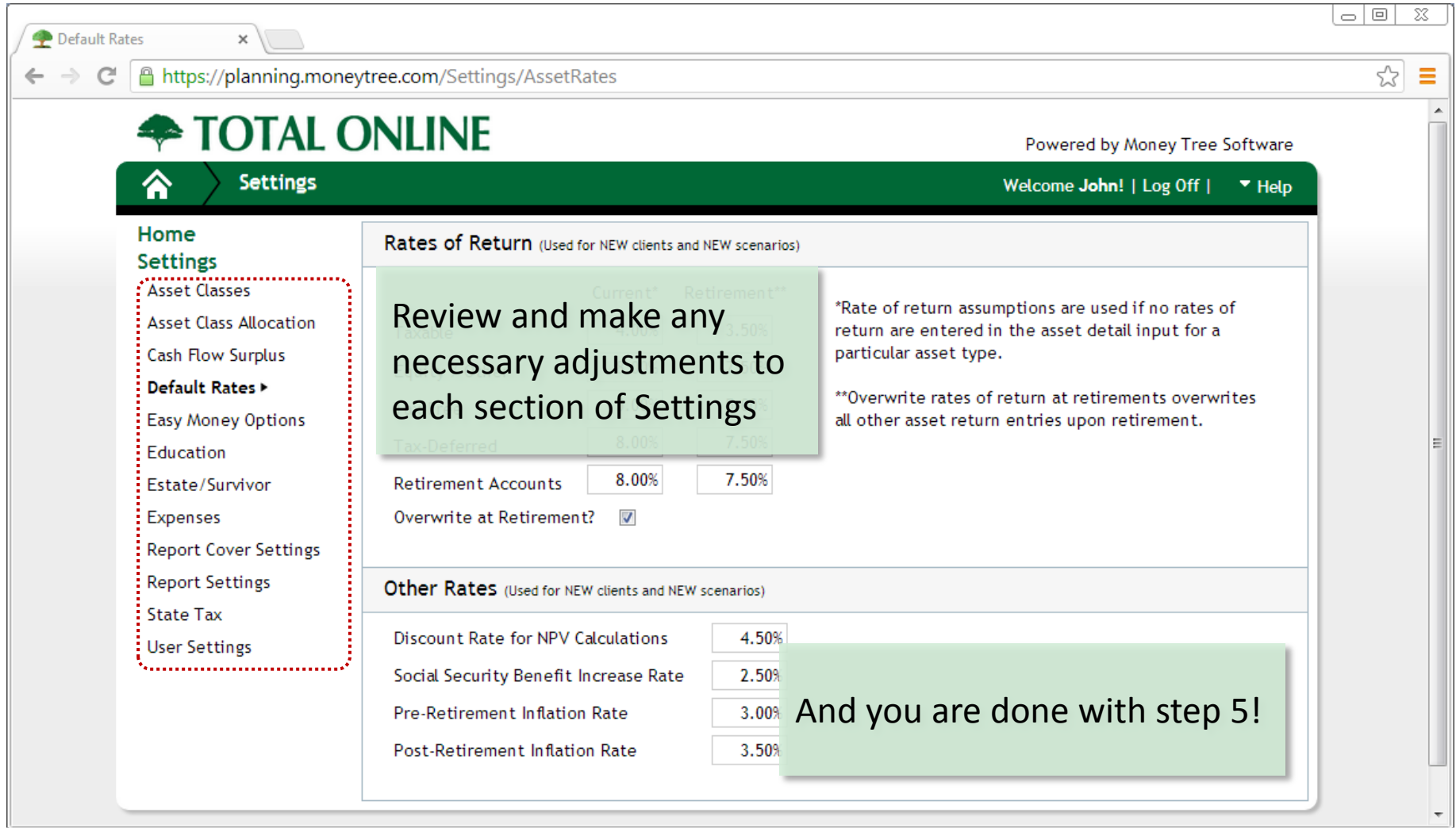
TOTAL Online Program Guides

Getting Started Videos

Desktop to Online Setup Guide

Click the HOME button to return to TOTAL Online's home page and view the full program menu, then click Settings

STEP 5 COMPLETE



The screenshot shows a web browser window with the URL <https://planning.moneytree.com/Settings/AssetRates>. The page header includes the 'TOTAL ONLINE' logo and 'Powered by Money Tree Software'. A green navigation bar contains a home icon, the word 'Settings', and a user greeting 'Welcome John! | Log Off | Help'. On the left, a sidebar menu lists various settings categories, with 'Default Rates' highlighted by a red dashed box. The main content area is titled 'Rates of Return (Used for NEW clients and NEW scenarios)'. It features a large green callout box with the text 'Review and make any necessary adjustments to each section of Settings'. Below this, there are input fields for 'Retirement Accounts' (8.00%) and 'Overwrite at Retirement?' (checked). A second section, 'Other Rates (Used for NEW clients and NEW scenarios)', includes input fields for 'Discount Rate for NPV Calculations' (4.50%), 'Social Security Benefit Increase Rate' (2.50%), 'Pre-Retirement Inflation Rate' (3.00%), and 'Post-Retirement Inflation Rate' (3.50%). A final green callout box at the bottom right of the settings area says 'And you are done with step 5!'.

Default Rates

https://planning.moneytree.com/Settings/AssetRates

TOTAL ONLINE Powered by Money Tree Software

Settings Welcome John! | Log Off | Help

Home Settings

- Asset Classes
- Asset Class Allocation
- Cash Flow Surplus
- Default Rates ▶**
- Easy Money Options
- Education
- Estate/Survivor
- Expenses
- Report Cover Settings
- Report Settings
- State Tax
- User Settings

Rates of Return (Used for NEW clients and NEW scenarios)

Review and make any necessary adjustments to each section of Settings

*Rate of return assumptions are used if no rates of return are entered in the asset detail input for a particular asset type.

**Overwrite rates of return at retirements overwrites all other asset return entries upon retirement.

	Current*	Retirement**
Retirement Accounts	8.00%	7.50%
Overwrite at Retirement?	<input checked="" type="checkbox"/>	

Other Rates (Used for NEW clients and NEW scenarios)

Discount Rate for NPV Calculations	4.50%
Social Security Benefit Increase Rate	2.50%
Pre-Retirement Inflation Rate	3.00%
Post-Retirement Inflation Rate	3.50%

And you are done with step 5!

Step 6 Import Custom Reports

The screenshot shows the TOTAL ONLINE web application interface. The browser address bar displays <https://planning.moneytree.com>. The page header includes the TOTAL ONLINE logo, a home icon, and the text "Powered by Money Tree Software". A navigation menu on the left lists: Home, Clients, Settings, Help, Administration, and Management Rpt. The top right of the page shows "Welcome John! | Log Off | Help" and "Last Logged In: Wed, Apr 24 2013, 8:44 AM".

Two text boxes are overlaid on the page:

- Text Box 1:** "If you have custom report sets in TOTAL Planning Suite 5.0, you can bring them into TOTAL Online"
- Text Box 2:** "To import custom report sets, you need to go to the reports section by opening any planning scenario for a client"

Below the text boxes, there are three circular icons with corresponding labels:

- Icon 1:** A document icon with horizontal lines, labeled "TOTAL Online Program Guides".
- Icon 2:** A play button icon, labeled "Getting Started Videos".
- Icon 3:** A document icon with three dots, labeled "Desktop to Online Setup Guide".

Step 6 Import Custom Reports

Report Customization

https://planning.moneytree.com/Report/ReportCustomization

TOTAL ONLINE Powered by Money Tree Software

Home > Freddy Franklin > Retirement > Reports Welcome John! | Log Off | Help

Home
Clients
Freddy Franklin
Planning Scenarios
Retirement
Plan Data
Assumptions

Assets
Expenses
Education
Monte Carlo
Reports

Freddy
Age 59
Retire 62
Life Exp. 97

Reports Report Customization

Report Customization

Report: Easy Money

Report Categories

General

Example Report Sets

Basic report

Selected Pages

With a client open and a planning scenario selected, Reports will be available on the left hand menu

Go to the second tab, Report Customization

Available Report Pages

Cover
General Divider (text)
Personal Statistics
Introduction (text)
Goal Based Planning (text)
Objectives - A1
Summary - A2
Retirement Summary - A2a
Financial Life Cycle (text) - A3
Net Worth Graph - A4
Net Worth - A5
Asset Details - A6
Advisor Details - A6a
Personal Property - A7

Add Selected Remove
Add All Remove All

Custom Report Sets

Save Delete

Import Custom Reports

Import Custom Report Sets. Browse...

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Step 6 Import Custom Reports

Report Customization

https://planning.moneytree.com/Report/ReportCustomization

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Home > Freddy Franklin > Retirement > Reports Welcome John! | Log Off | Help

Home
Clients
Freddy Franklin
Planning Scenarios
Retirement
Plan Data
Assumptions

Assets
Expenses
Education
Monte Carlo
Reports

Freddy
Age 59
Retire 62
Life Exp. 97

Reports Report Customization

Report Customization

Report: Easy Money

Report Categories

General
Investment
Retirement
Financial Life Cycle
Net Worth Graph - A4
Net Worth - A5
Asset Details - A6
Advisor Details - A6a
Personal Property - A7

Example Report Sets
Basic report

Selected Pages

Available Report Pages

Cover
General Divider (text)
Personal Statistics
Introduction (text)
Goal Based Planning (text)
Objectives - A1
Summary - A2
Retirement Summary - A2a
Financial Life Cycle (text) - A3
Net Worth Graph - A4
Net Worth - A5
Asset Details - A6
Advisor Details - A6a
Personal Property - A7

Custom Report Sets

Save Delete

Short Retirement Plan

Import Custom Reports

Import Custom Report Sets. Browse...

Go to the second tab, Report Customization

With a client open and a planning scenario selected, Reports will be available on the left hand menu

The import option will be at the bottom of this page

Step 6 Import Custom Reports

Report Customization

https://planning.moneytree.com/Report/ReportCustomization

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Home > Freddy Franklin > Retirement > Reports Welcome John! | Log Off | Help

Home
Clients
Freddy Franklin
Planning Scenarios
Retirement
Plan Data
Assumptions
Assets
Liabilities
Income
Insurance
Taxes
Estate & Survivor
Expenses
Education
Monte Carlo
Reports

Freddy
Age 59
Retire 62
Life Exp. 97

Reports Report Customization

Report Customization

Report: Easy Money

Report Categories

- General
- Investment
- Retirement
- Income Tax
- Estate
- Insurance
- Appendix
- Data
- Company Documents

Example Report Sets

- Basic report
- Retirement
- Education
- Investment
- Survivor
- Estate
- Entire w/o Appendix
- Entire w/ Comparison
- Entire
- Retirement Comparison

Selected Pages

Available Report Pages

- Cover
- General Divider (text)
- Personal Statistics
- Introduction (text)
- Goal Based Planning (text)
- Objectives - A1
- Summary - A2
- Retirement Summary - A2a
- Financial Life Cycle (text) - A3
- Net Worth Graph - A4
- Net Worth - A5
- Asset Details - A6
- Advisor Details - A6a
- Personal Property - A7

Import Custom Reports

Import Custom Report Sets.

Click browse – a message will display warning, which is only an issue for users that already created custom reports in TOTAL Online

Step 6 Import Custom Reports

The file that hold your custom reports is called tpsx.mtconfig

The file location will vary based on your operating system

Windows XP - C:\Documents and Settings\All Users\Application Data\Money Tree Software\TOTAL Planning Suite 5.0\tpsx.mtconfig

Note: If you do not see the Application Data folder, you need to show hidden folders by selecting Tools - Folder and Search Options -> View -> Show hidden files, folders, and drives

Windows Vista, 7, and 8 - C:\ProgramData\Money Tree Software\Total Planning Suite 5.0\tpsx.mtconfig

Note: If you do not see the Application Data folder, you need to show hidden folders by selecting Organize - Folder and Search Options -> View -> Show hidden files, folders, and drives

Import Custom Reports

Import Custom Report Sets.

Browse...

STEP 6 COMPLETE

Report Customization

https://planning.moneytree.com/Report/ReportCustomization

TOTAL ONLINE Powered by Money Tree Software

Welcome John! | Log Off | Help

After you have selected the tpsx.mtconfig, a message will display indicating the custom reports have uploaded

Example Report Sets

- Retirement
- Education
- Investment
- Survivor
- Estate
- Entire w/o Appendix
- Entire w/ Comparison
- Entire
- Retirement Comparison

Selected Pages

Available Report Pages

- Cover
- General Divider (text)
- Personal Statistics
- Introduction (text)
- Goal Based Planning (text)
- Objectives - A1
- Summary - A2
- Retirement Summary - A2a
- Financial Life Cycle (text) - A3
- Net Worth Graph - A4

Custom Report Sets

- Short Retirement Plan

Save Delete







The custom report sets available in TOTAL Online will now be populated with your custom reports from TOTAL Planning Suite 5.0

Step 6 is complete!

Freddy

Age	59
Retire	62
Life Exp.	97

You completed the Step-by-Step Setup Guide

1.  Create a TOTAL Online Account
2.  Define Users, Roles and Style Settings
3.  Upload and Convert Client Database
4.  Review Database Conversion Stats
5.  Review Settings
6.  Import Custom Reports

Be sure to check out this additional guide:

“Adapting from the Desktop Edition”

This document helps users of TOTAL Planning Suite 5.0 (desktop) learn where things are in TOTAL Online.

**A guide to answers the question:
Where'd you move my stuff?**

Now start planning with TOTAL Online!

Setup Guide

Thank you for taking the time to view this presentation on converting from TOTAL Planning Suite (desktop edition) to TOTAL Online (online edition).

Questions?

Ask Money Tree's Support Team

Toll free 1.877.421.9815
support@moneytree.com