TOTAL Online

EASY MONEY GOLDEN YEARS

Setup Guide

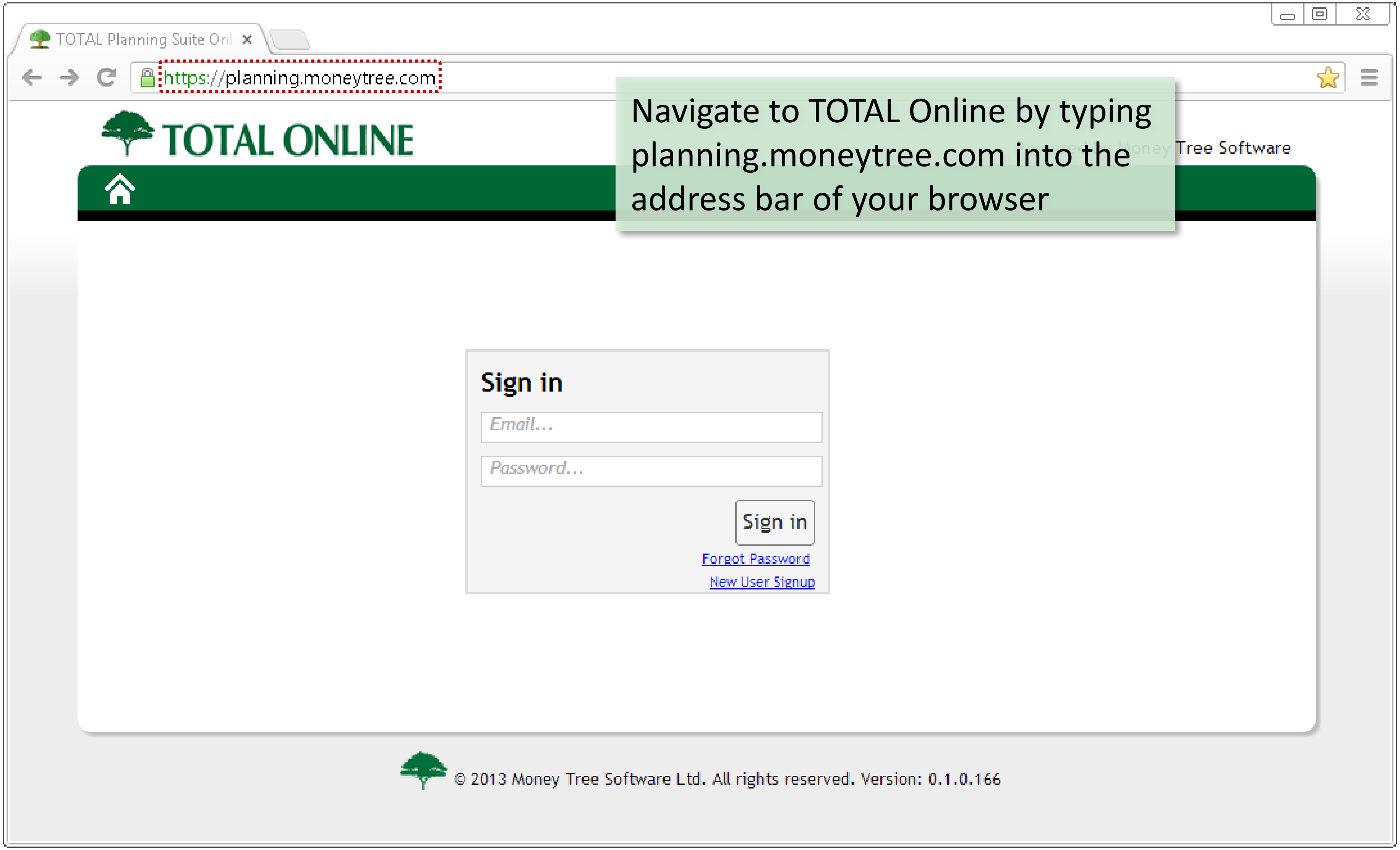
Converting from Desktop to Online Edition

Your Step-by-Step Guide

Convert to TOTAL Online in 6 easy steps

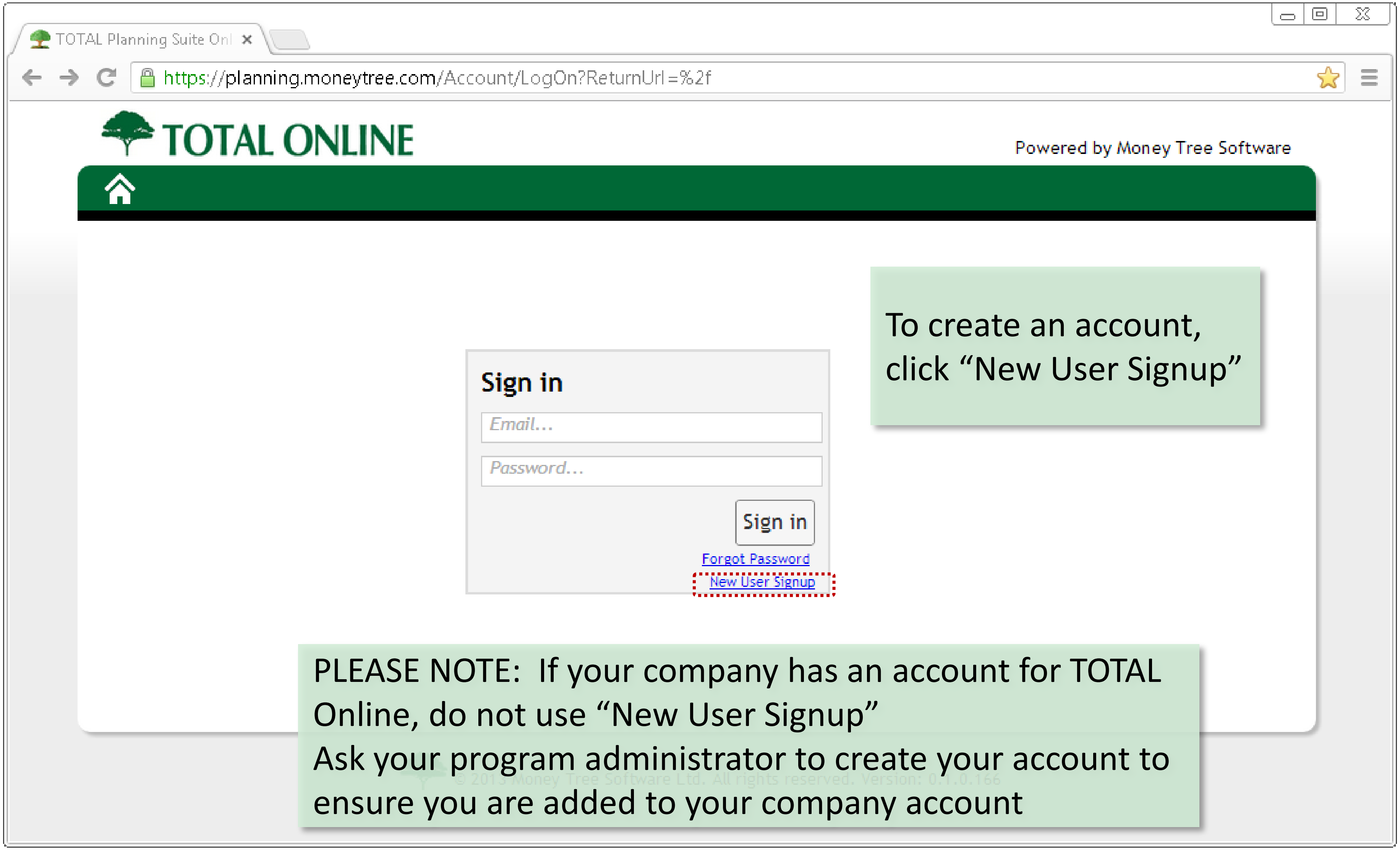
1. Create a TOTAL Online Account
2. Define Users, Roles and Style Settings
3. Upload and Convert Client Database
4. Review Database Conversion Stats
5. Review Settings
6. Import Custom Reports

Step 1 Create a TOTAL Online Account



Navigate to TOTAL Online by typing planning.moneytree.com into the address bar of your browser

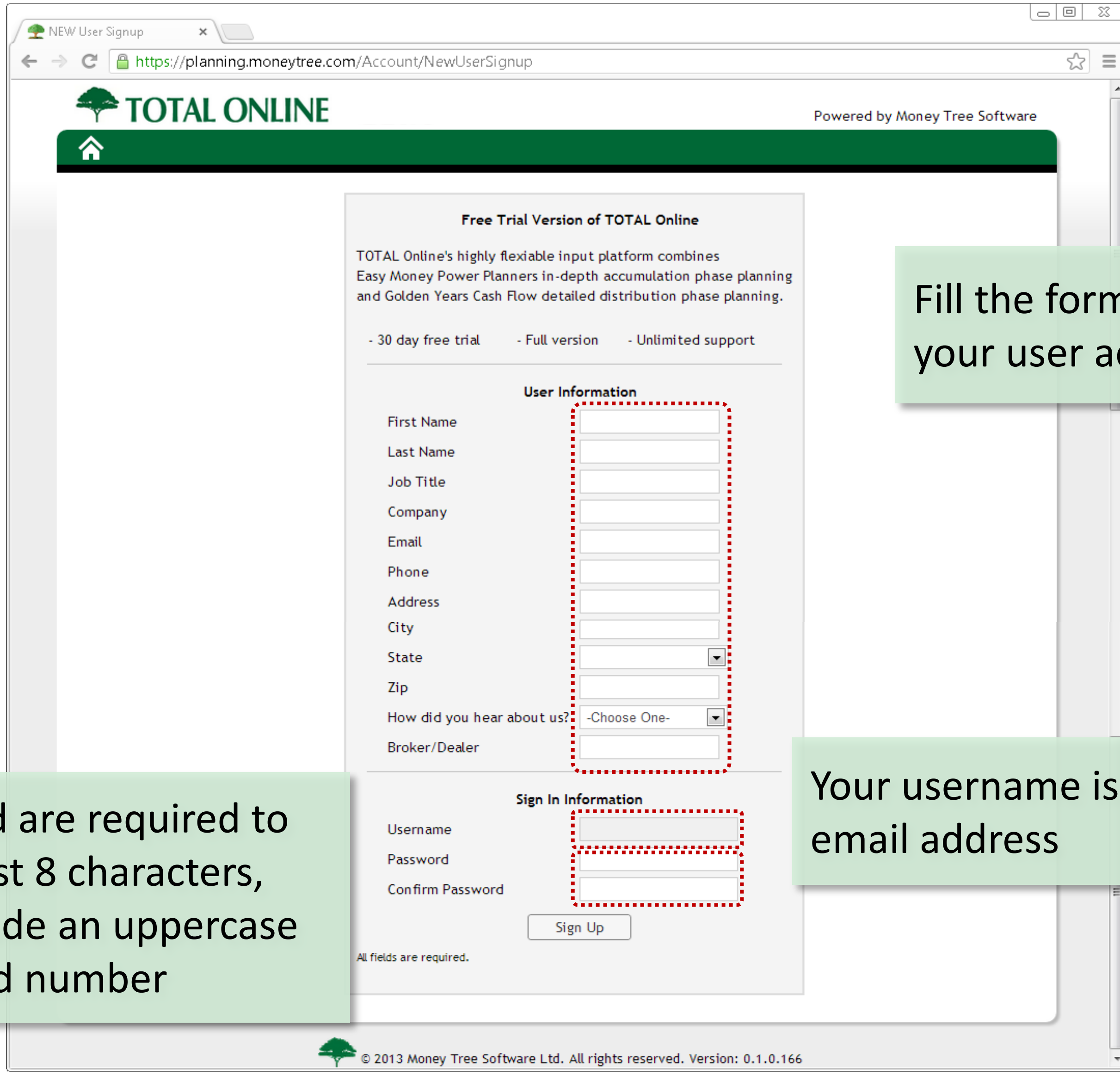
Step 1 Create a TOTAL Online Account



To create an account, click "New User Signup"

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



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

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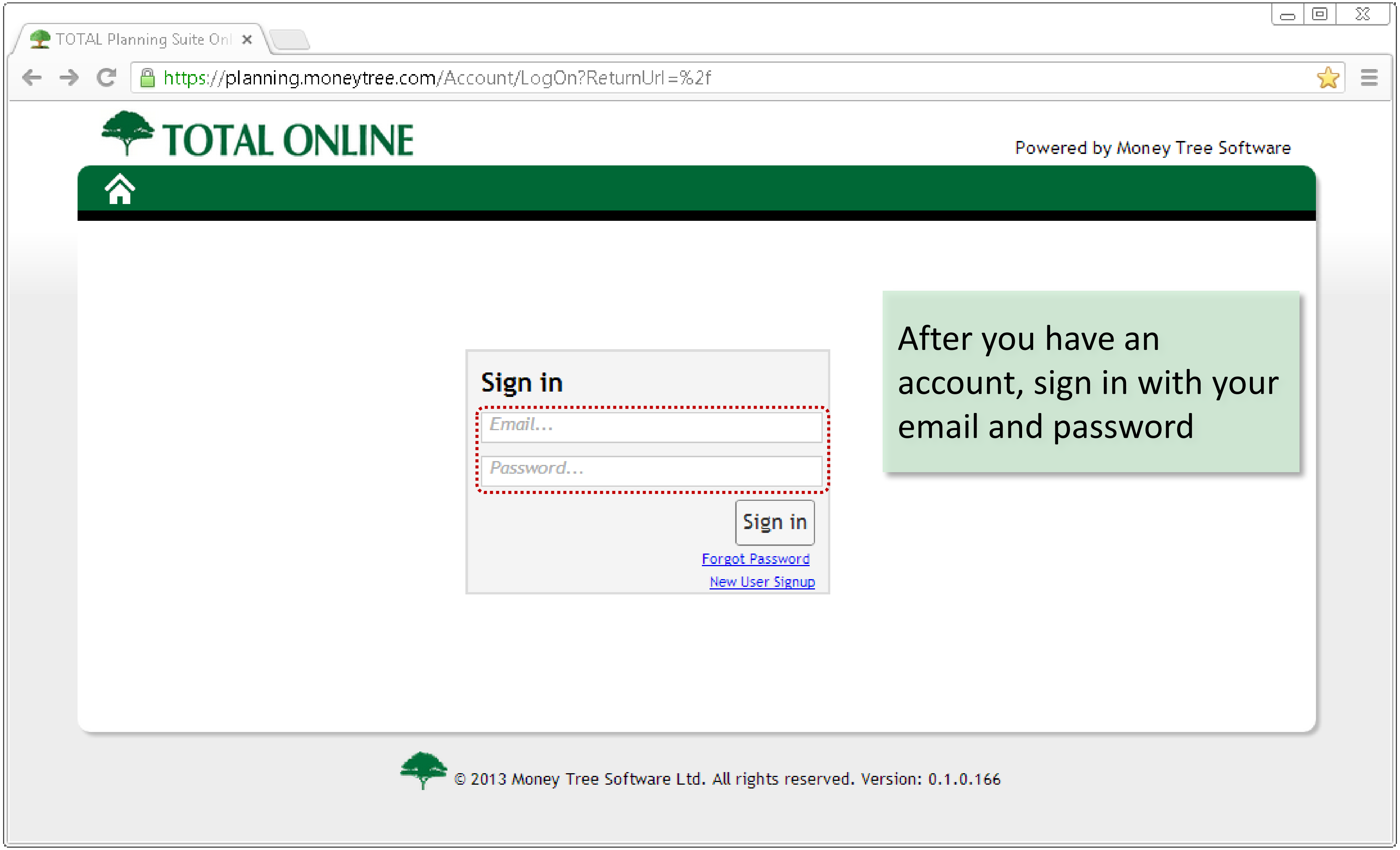

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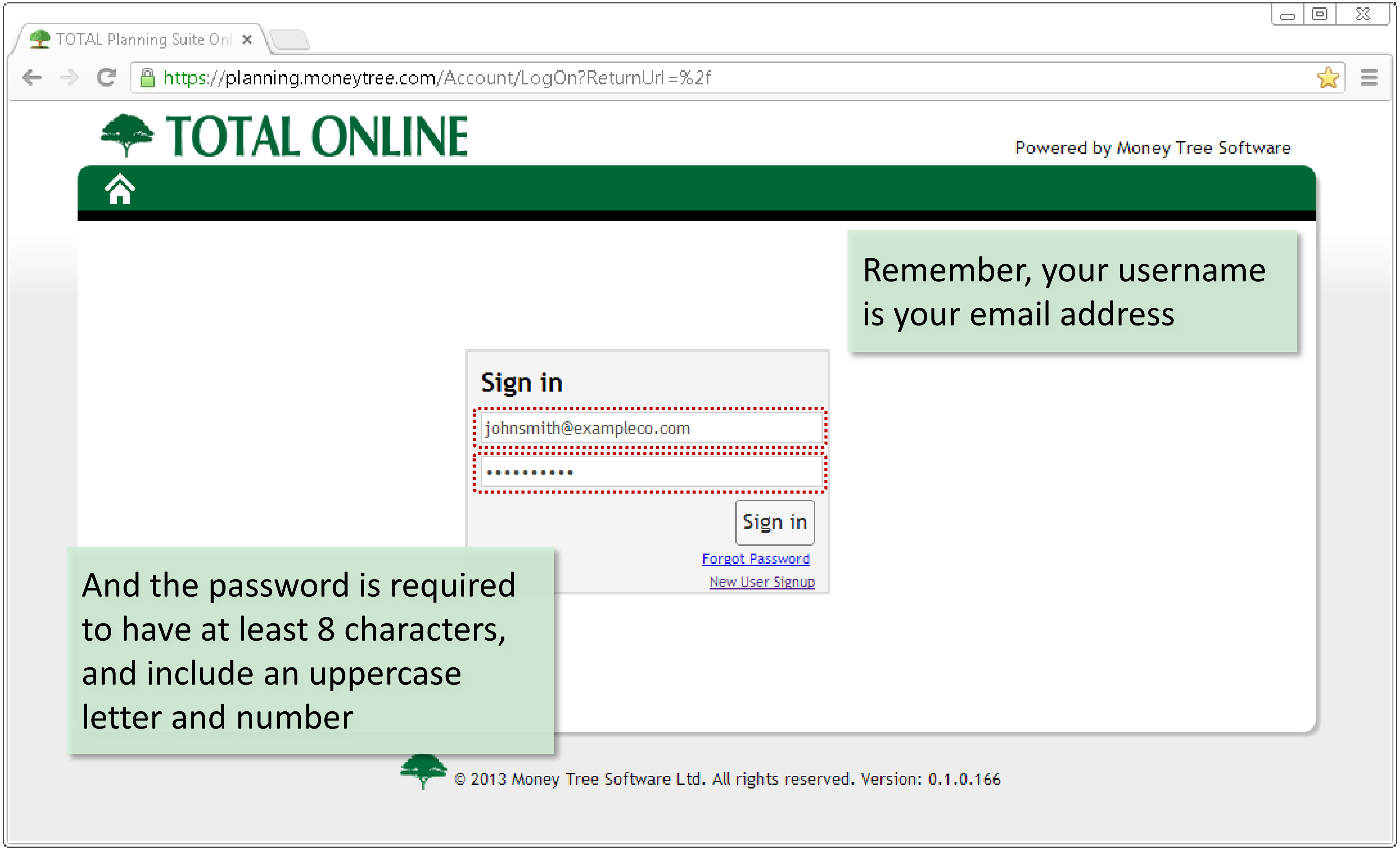
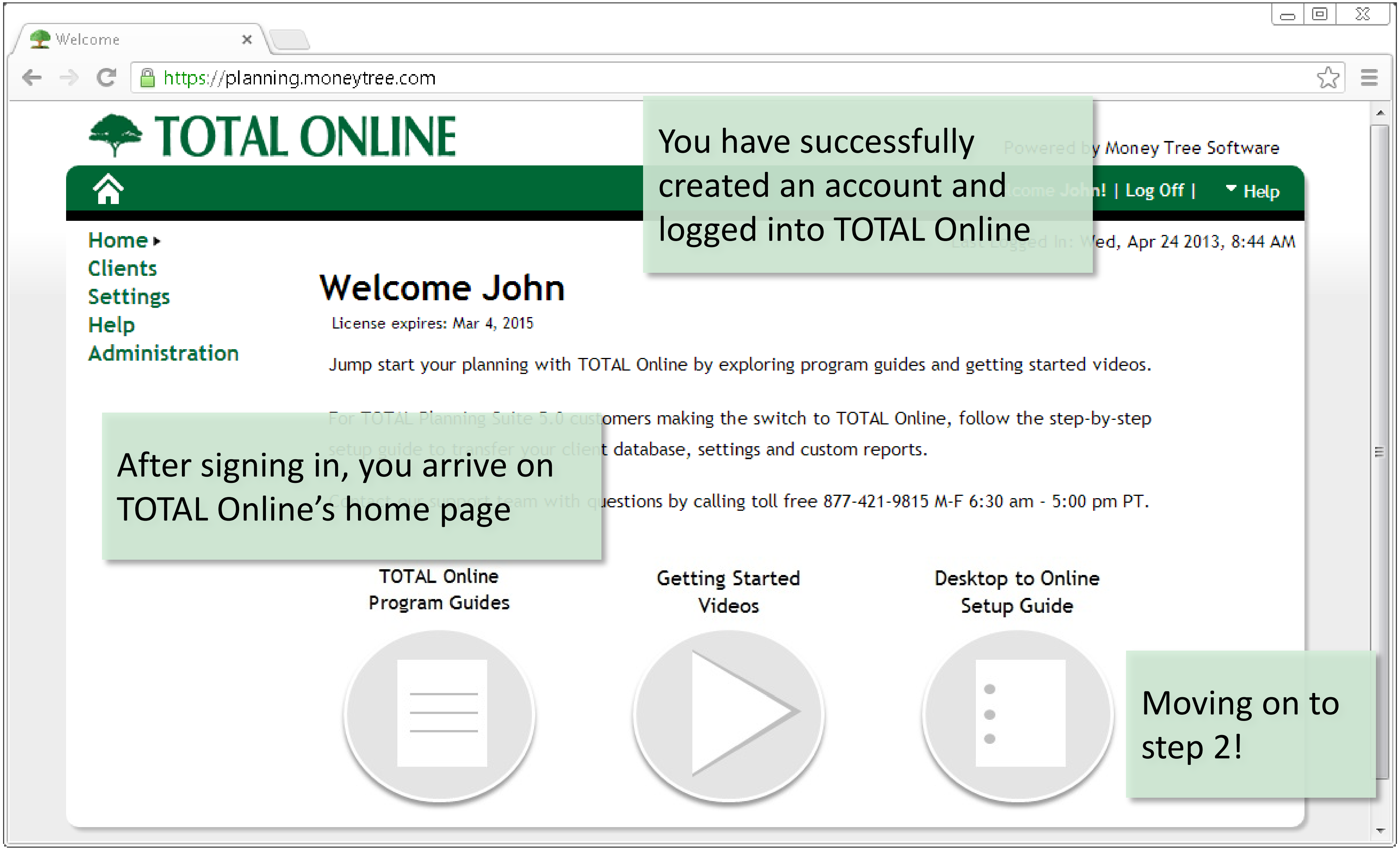


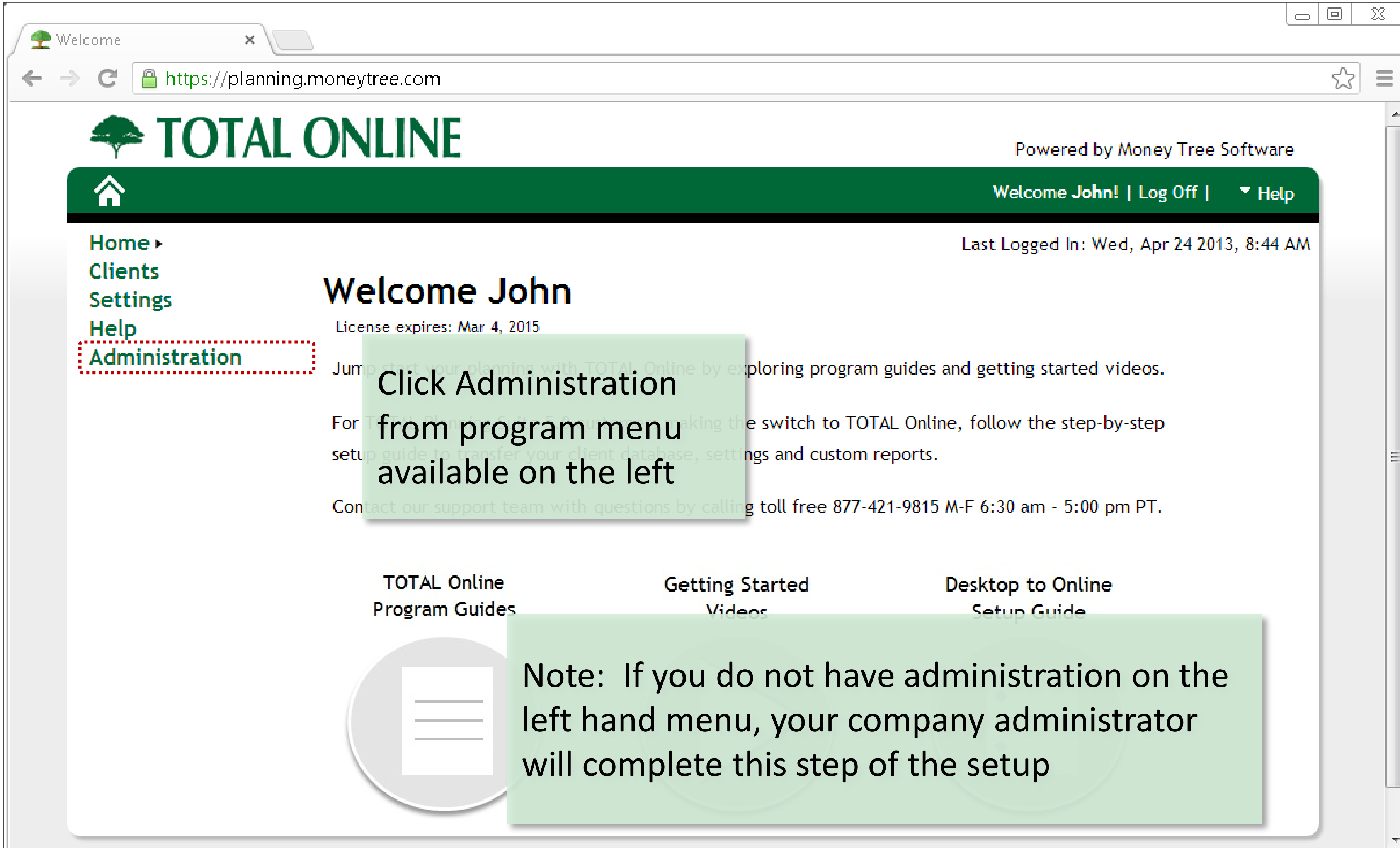
Remember, your username is your email address

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

STEP 1 COMPLETE



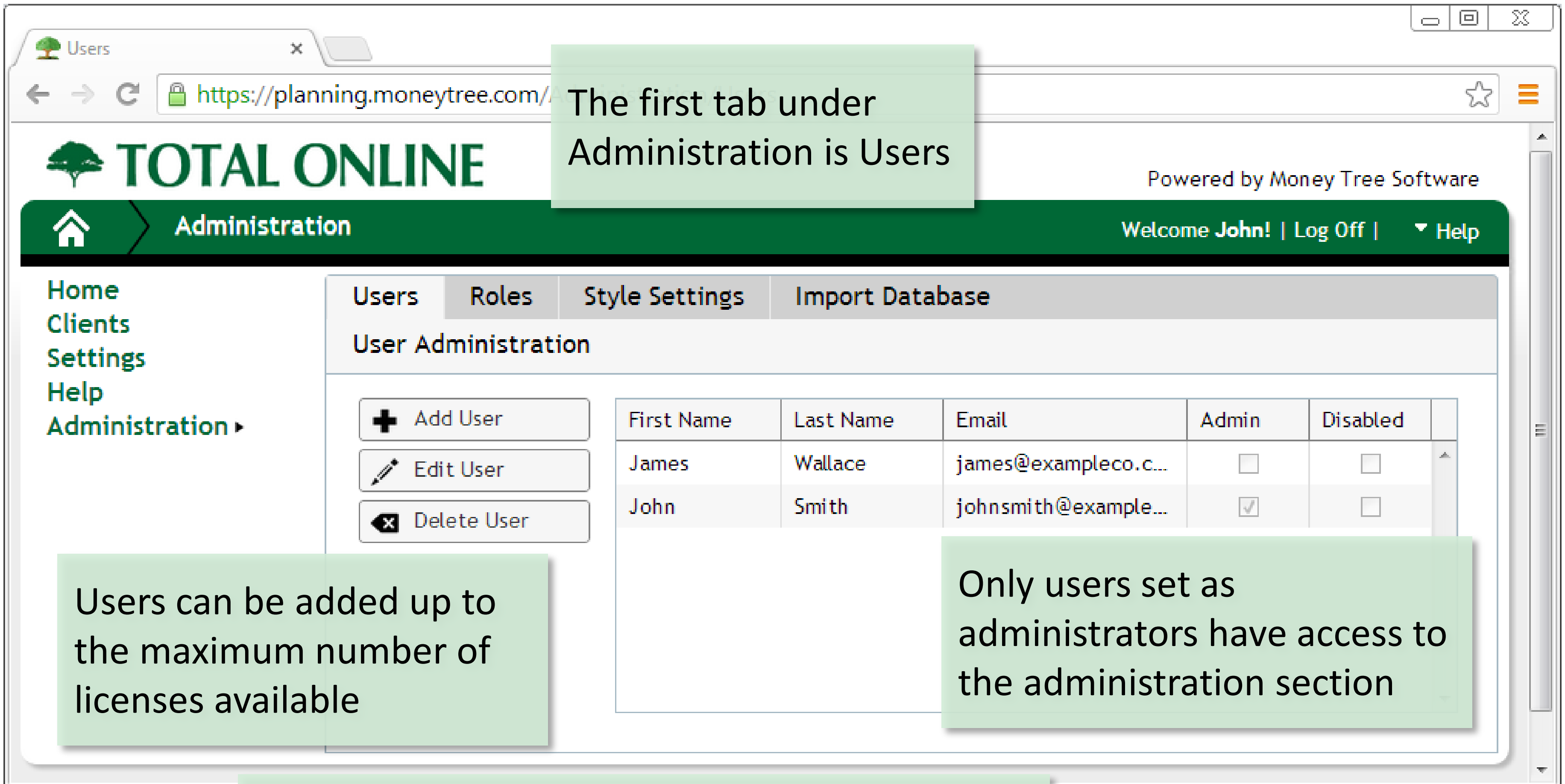
Step 2 Define Users, Roles & Style Settings



Click Administration from program menu available on the left

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



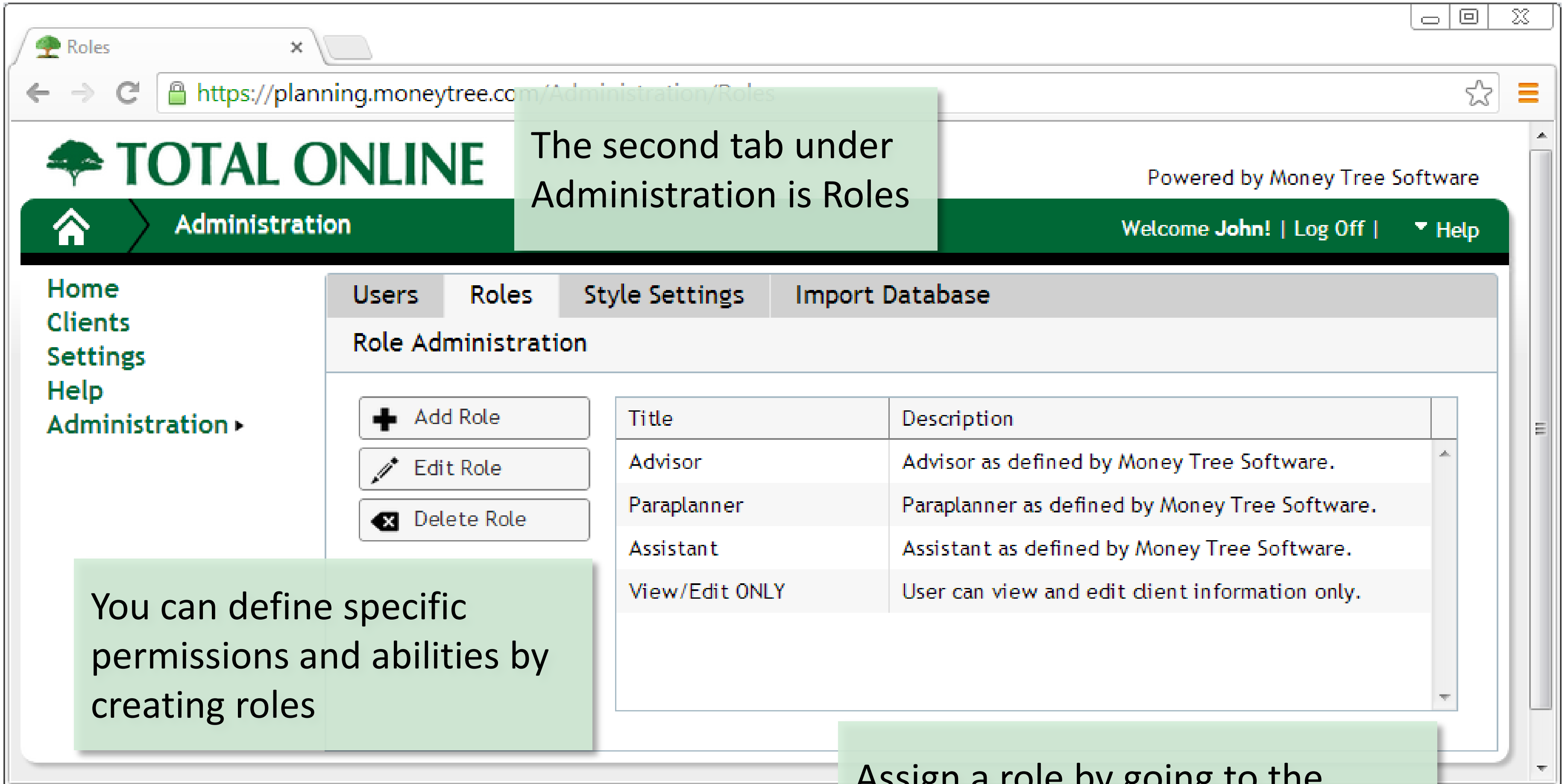
The first tab under Administration is Users

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

Only users set as administrators have access to the administration section

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

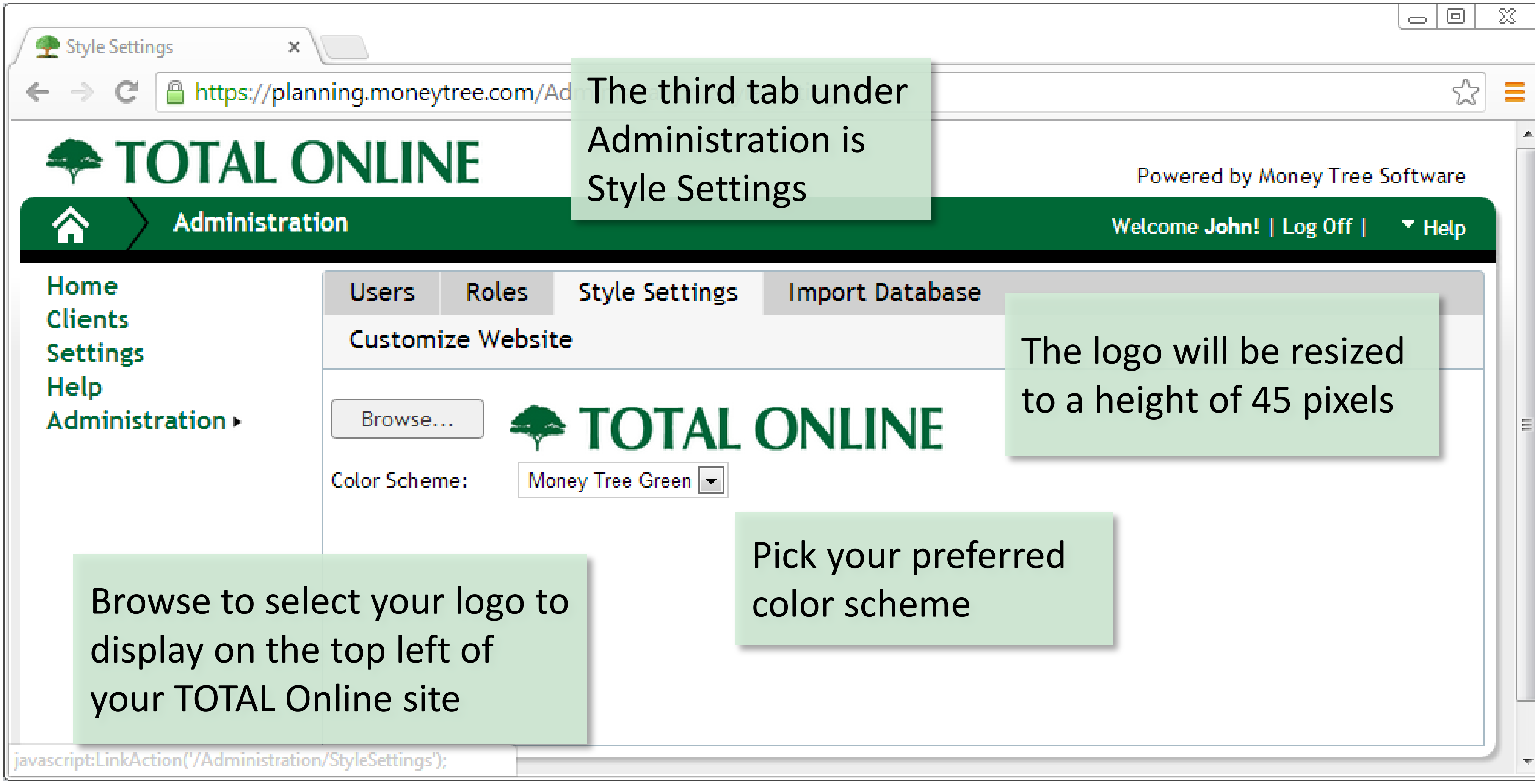


The second tab under Administration is Roles

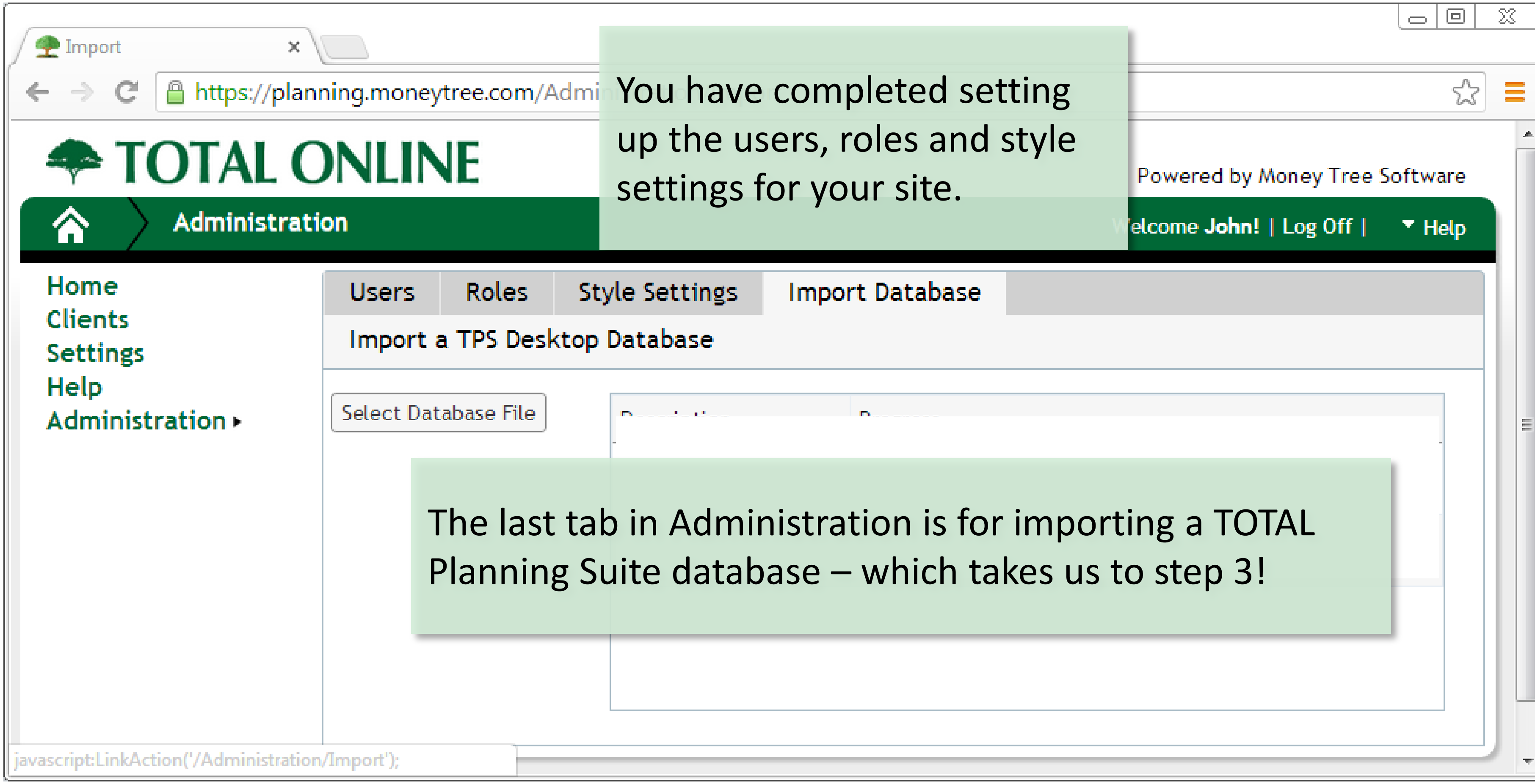
You can define specific permissions and abilities by creating roles

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

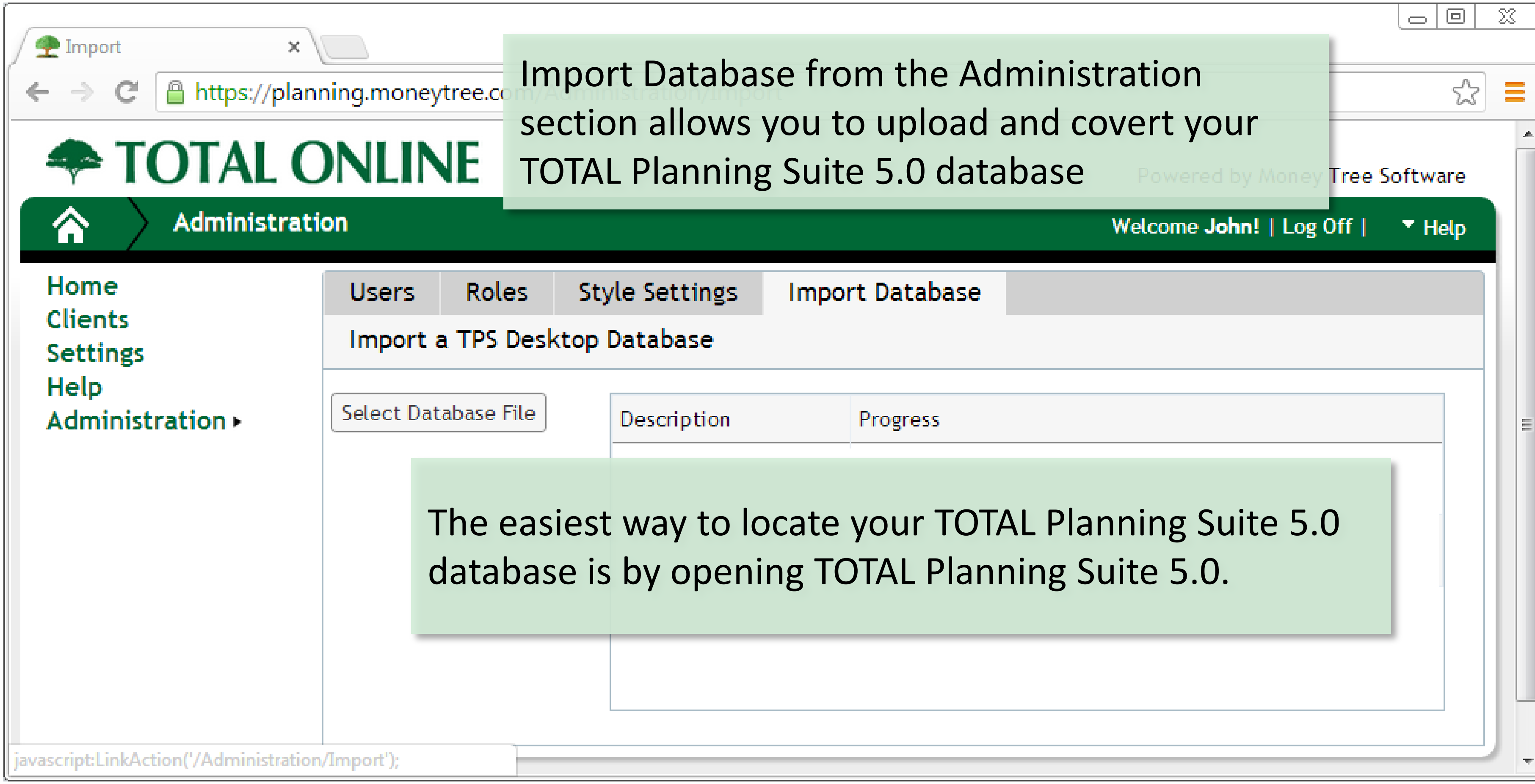
Step 2 Define Users, Roles & Style Settings



STEP 2 COMPLETE



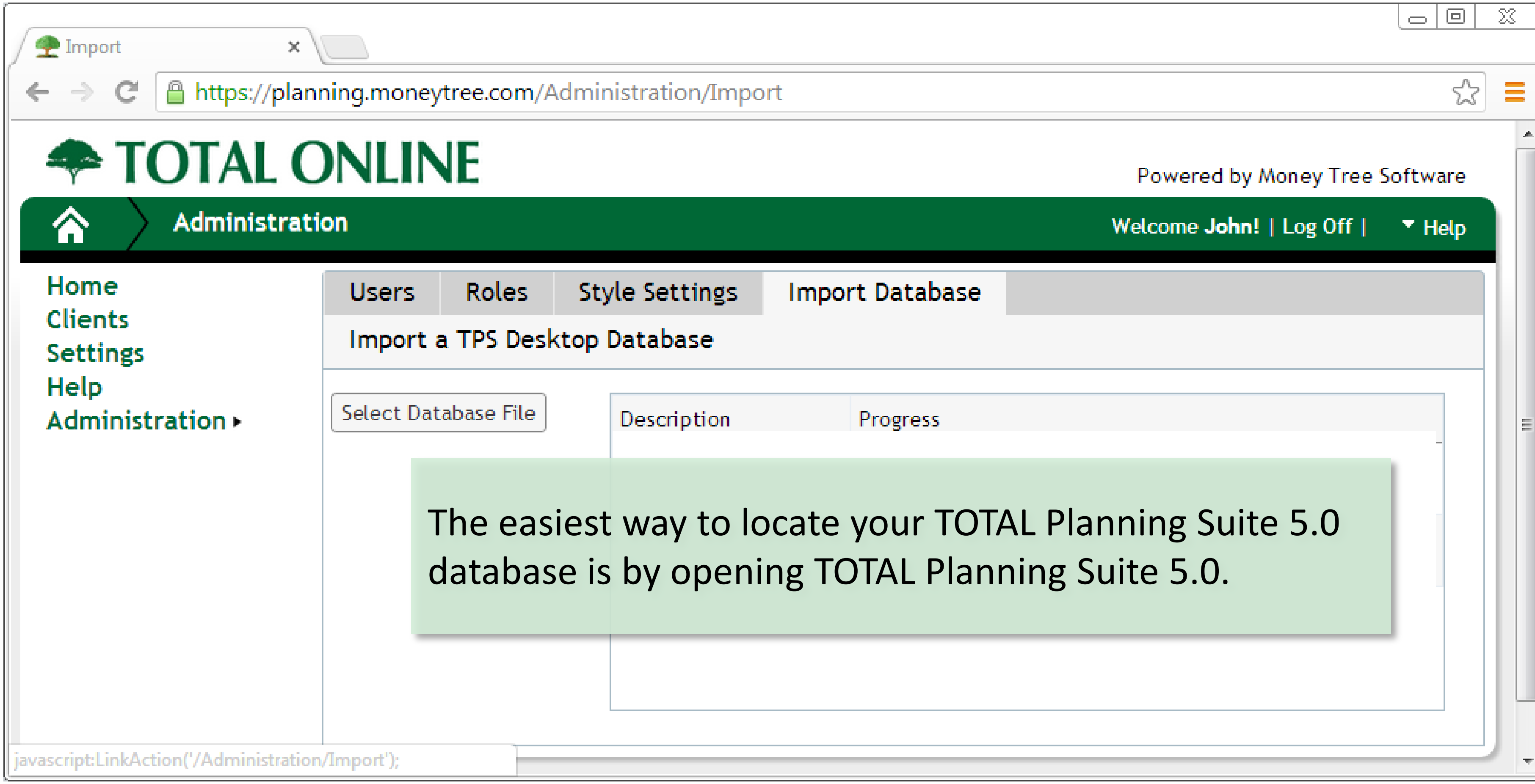
Step 3 Upload and Covert Client Database



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.

Step 3 Upload and Covert Client Database



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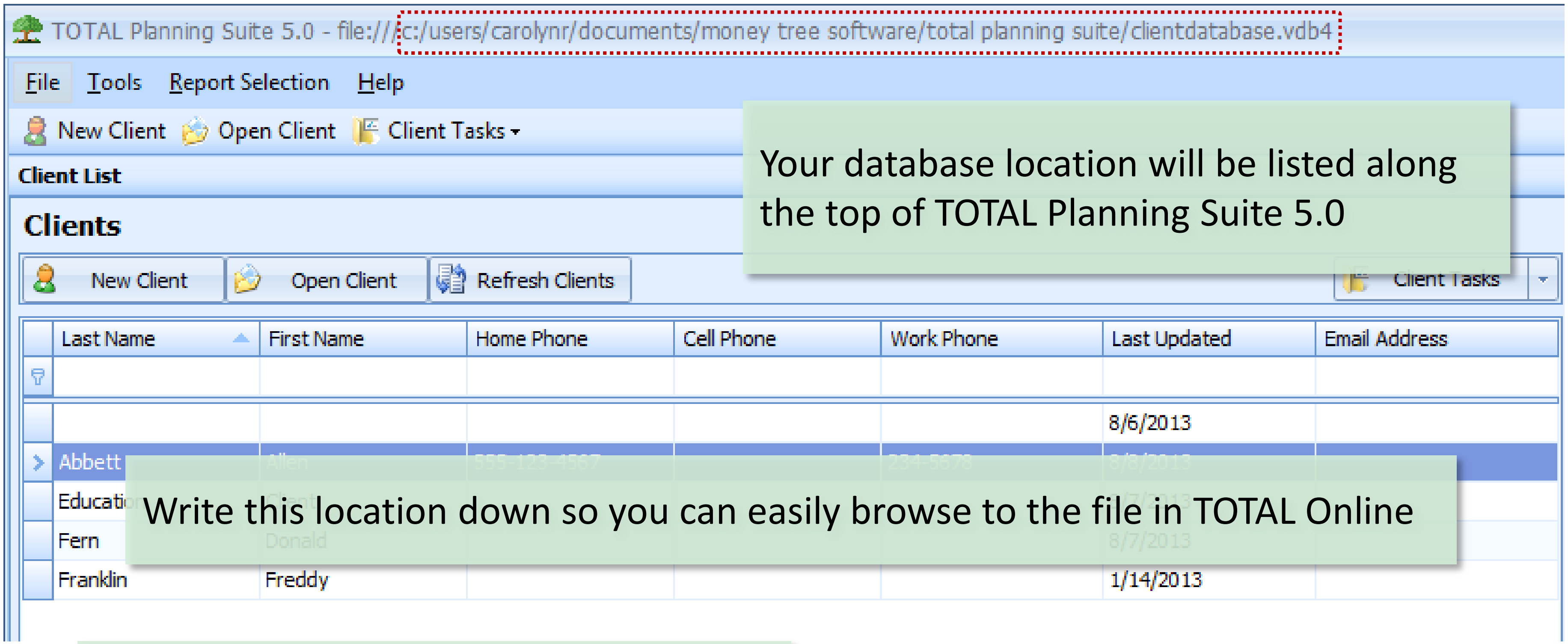
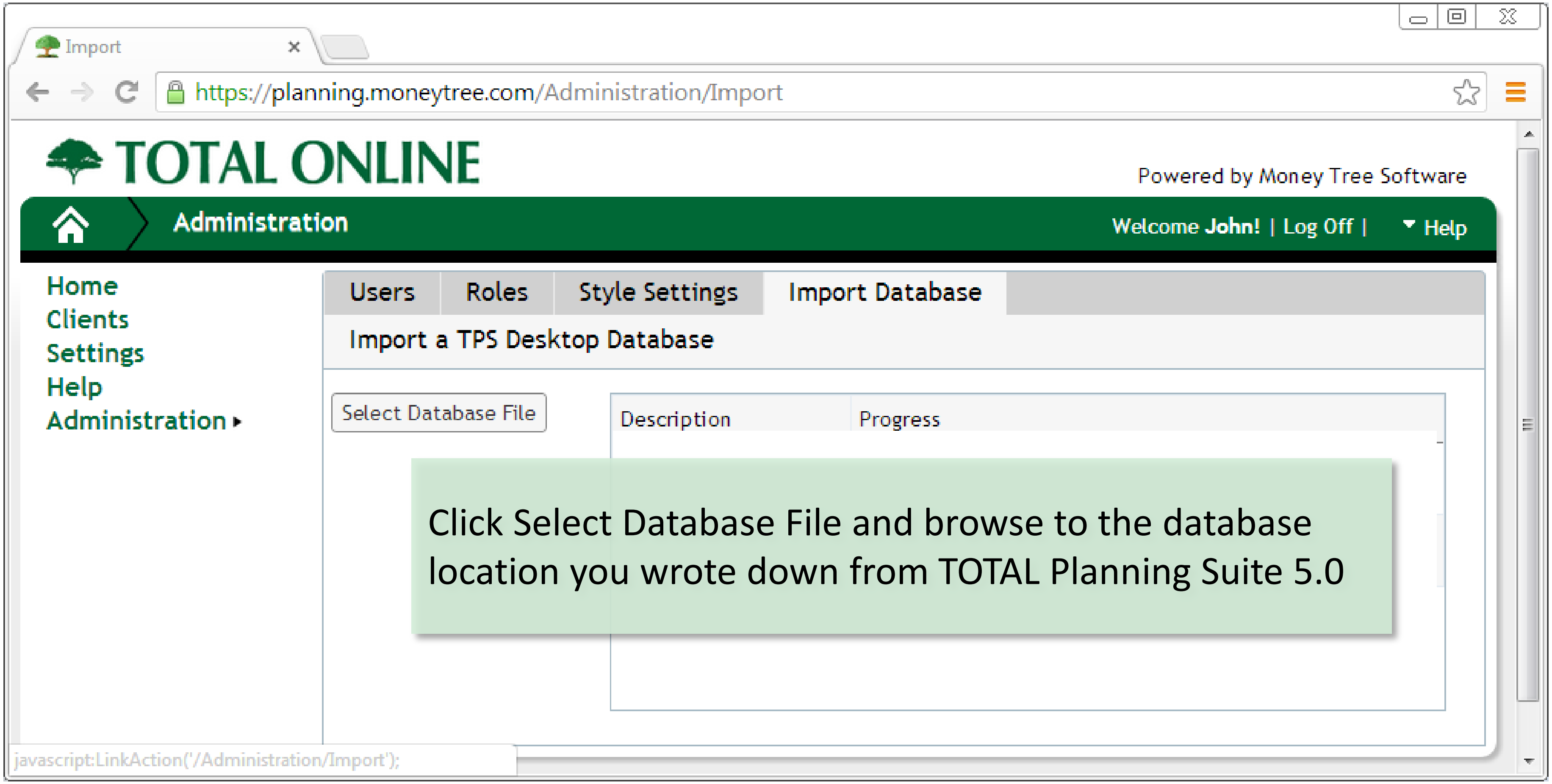


Your database location will be listed along the top of TOTAL Planning Suite 5.0

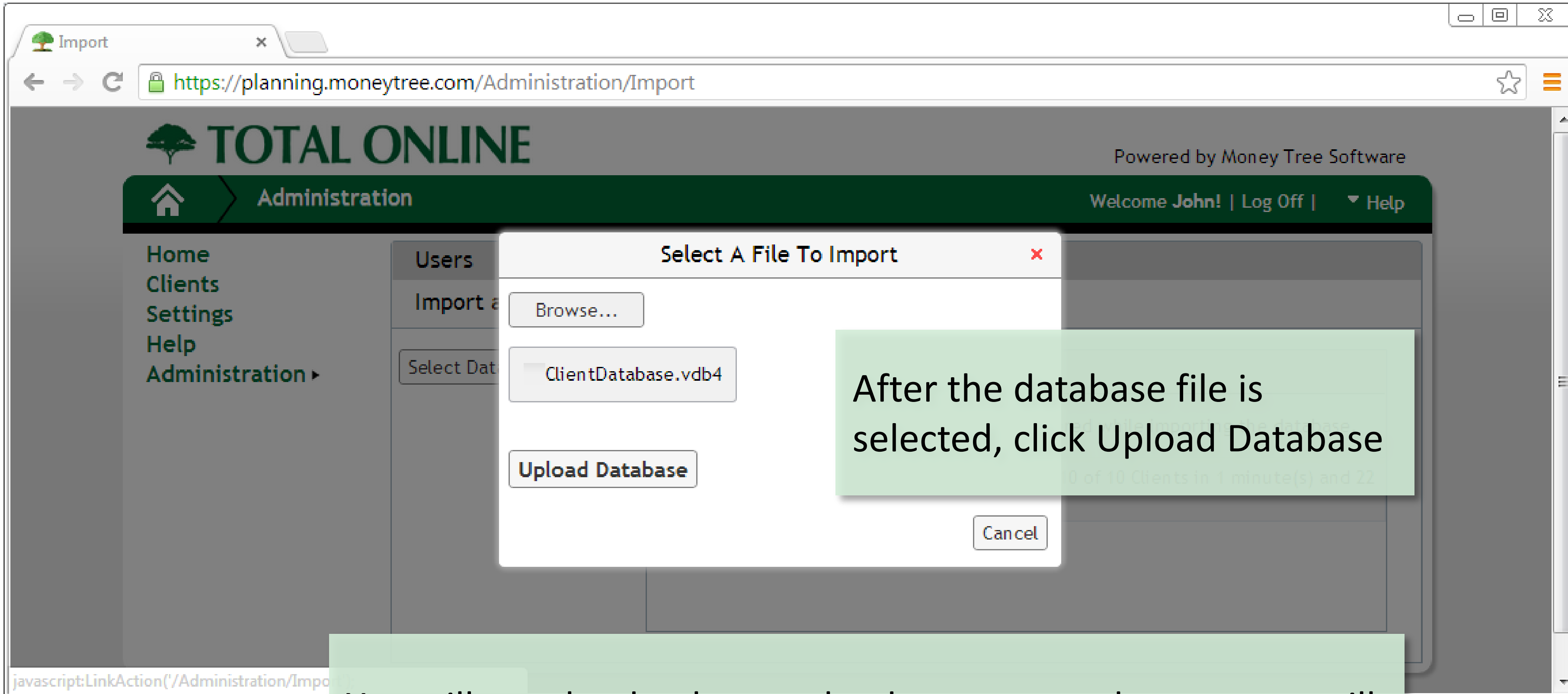
Write this location down so you can easily browse to the file in TOTAL Online

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

Step 3 Upload and Covert Client Database



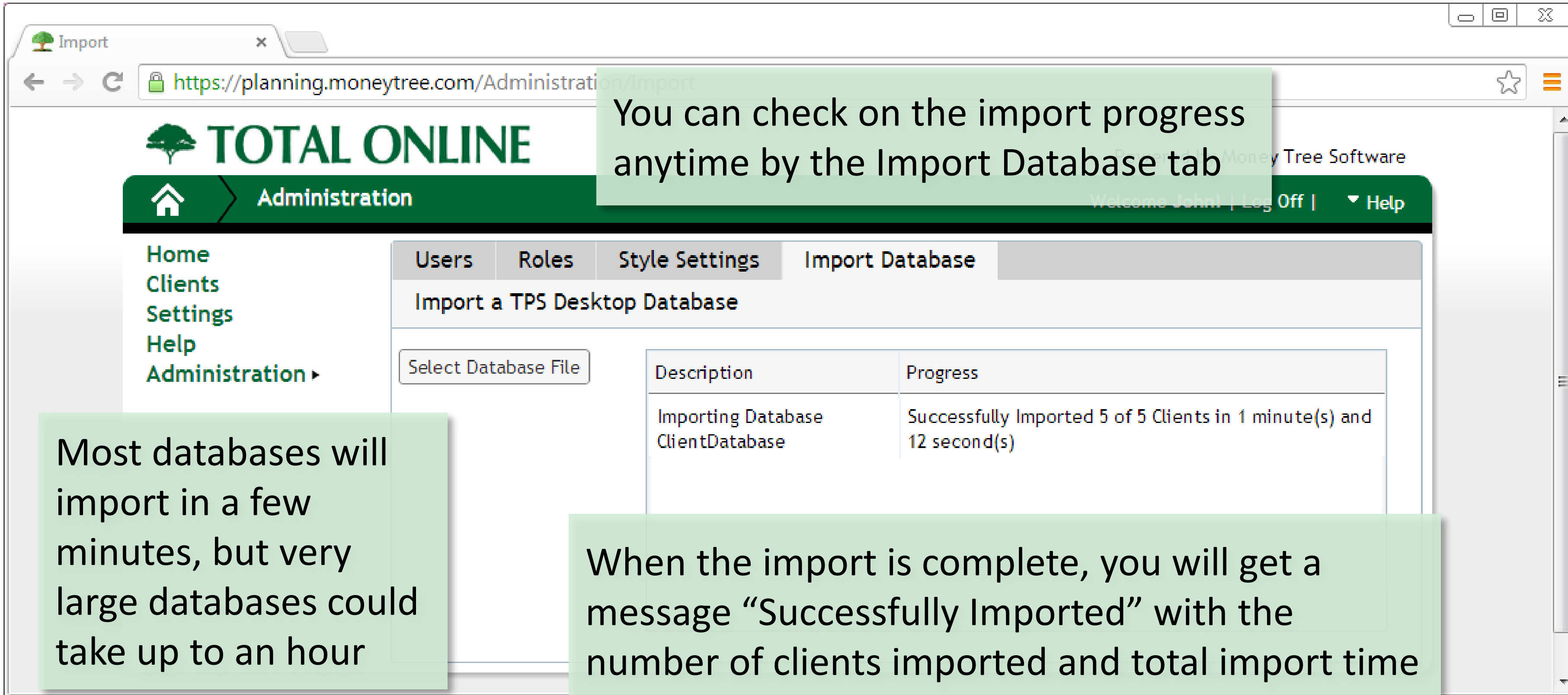
Step 3 Upload and Covert Client Database



After the database file is selected, click Upload Database

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

STEP 3 COMPLETE



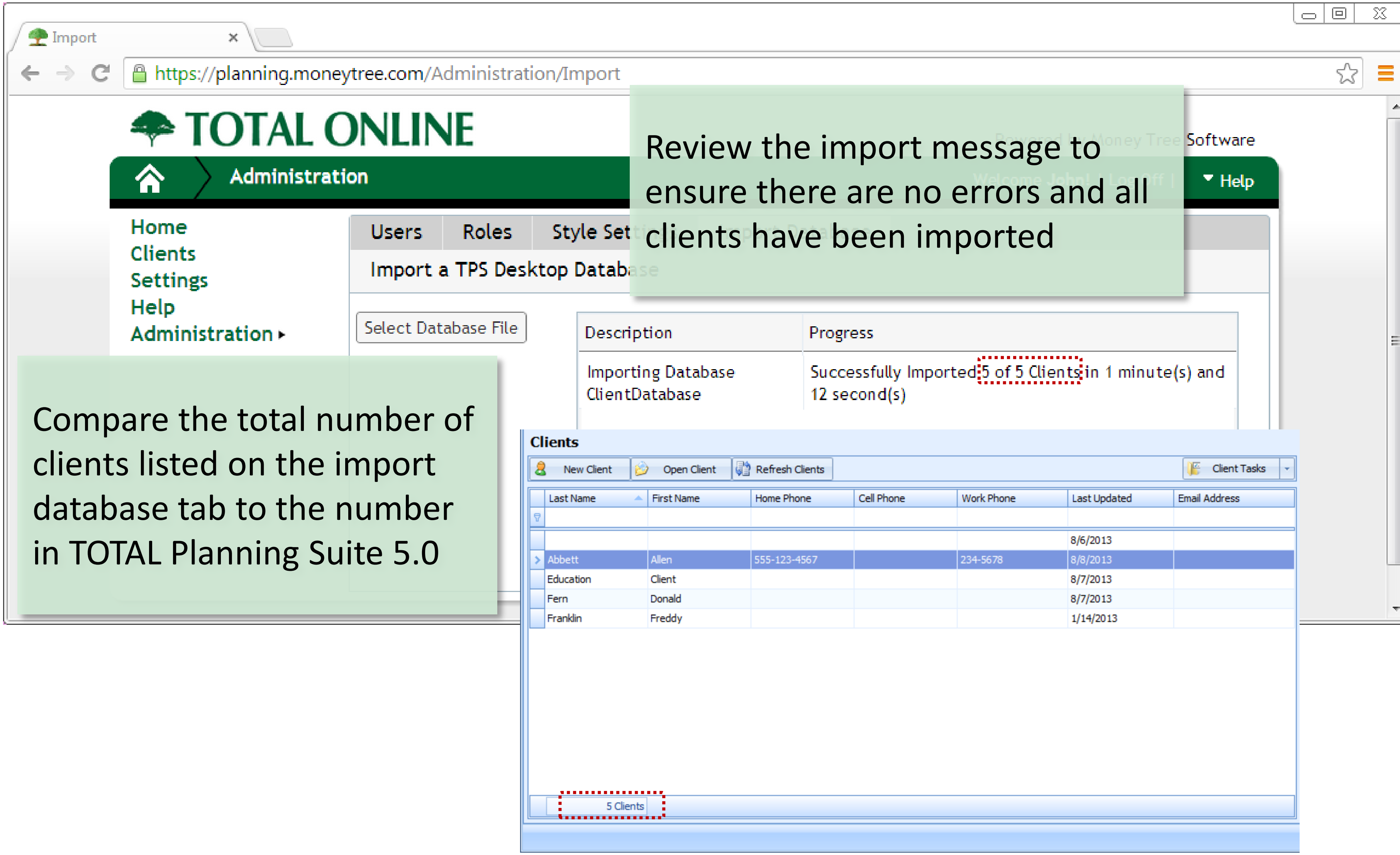
You can check on the import progress anytime by the Import Database tab

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

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

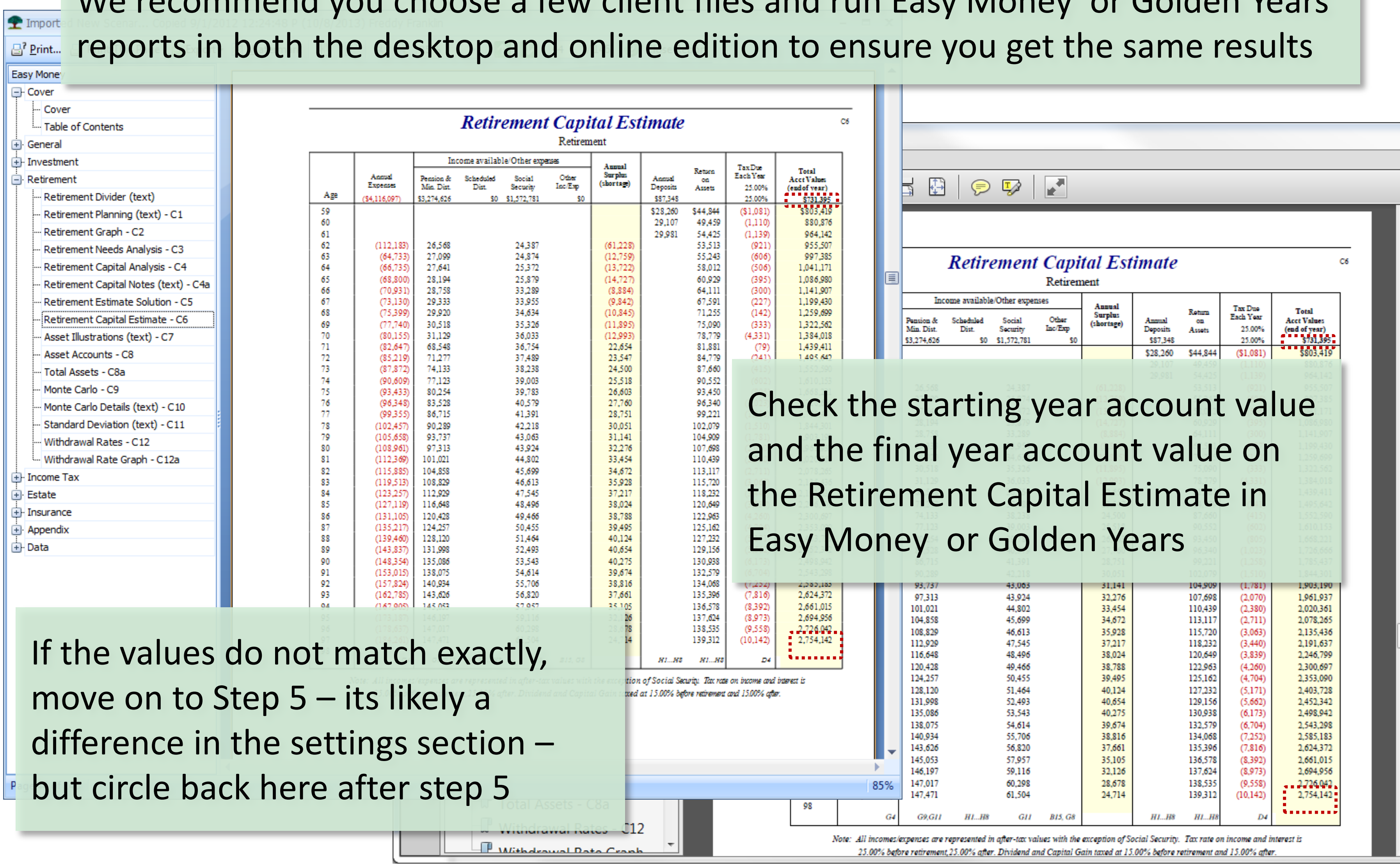


Review the import message to ensure there are no errors and all clients have been imported

Compare the total number of clients listed on the import database tab to the number in TOTAL Planning Suite 5.0

Step 4 Review Database Conversion Stats

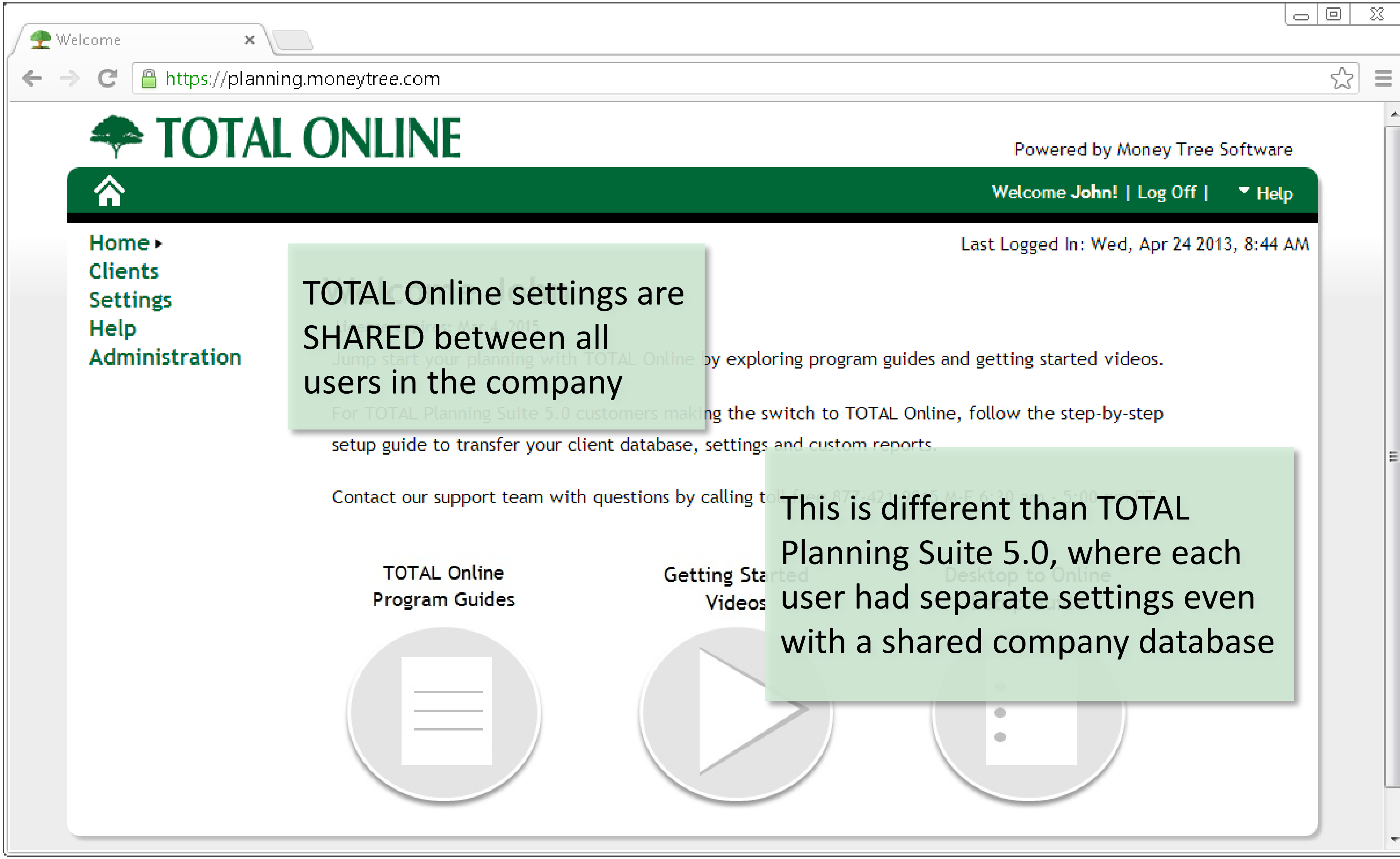
We recommend you choose a few client files and run Easy Money or Golden Years reports in both the desktop and online edition to ensure you get the same results



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

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

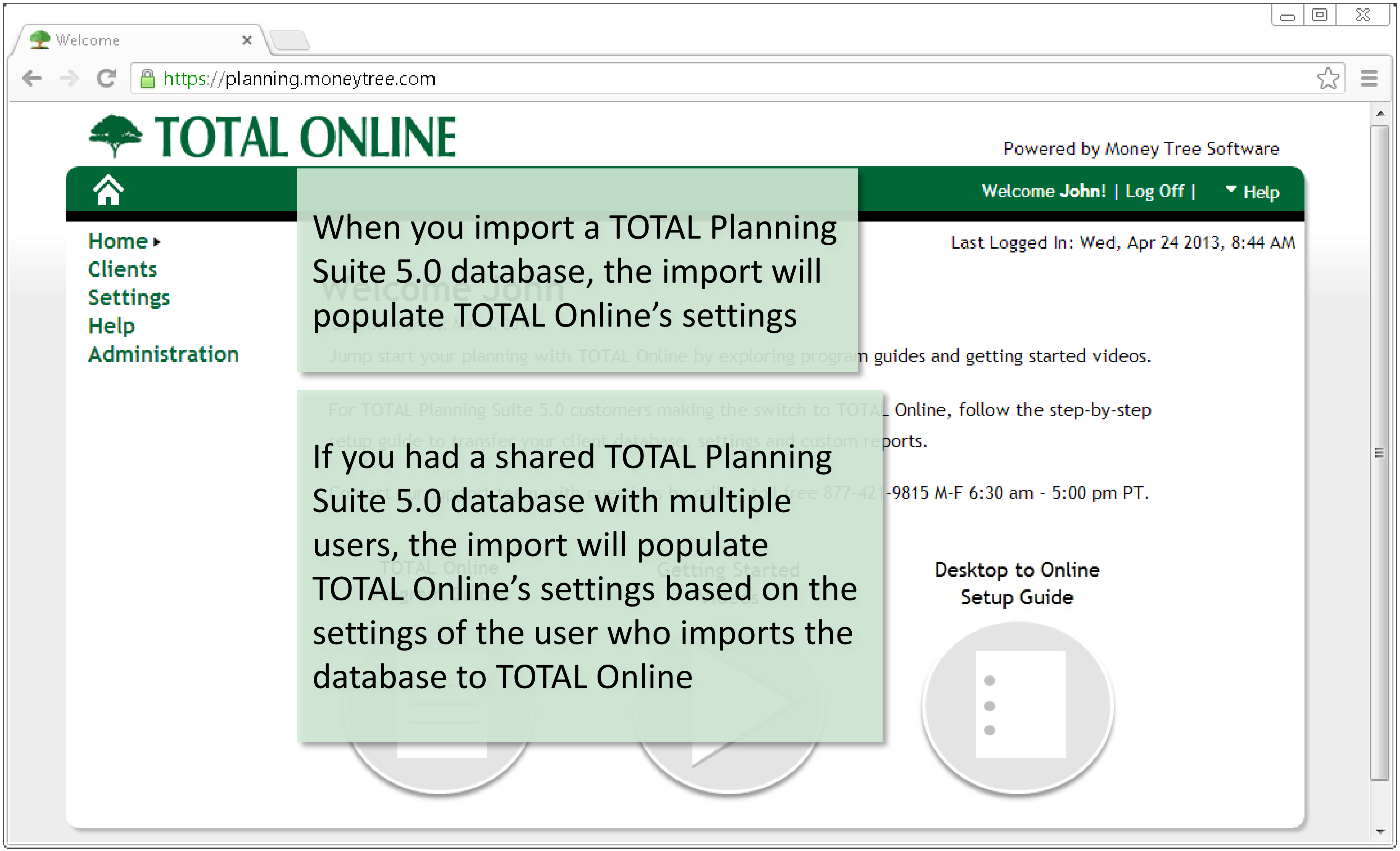
Step 5 Review Settings



TOTAL Online settings are SHARED between all users in the company

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

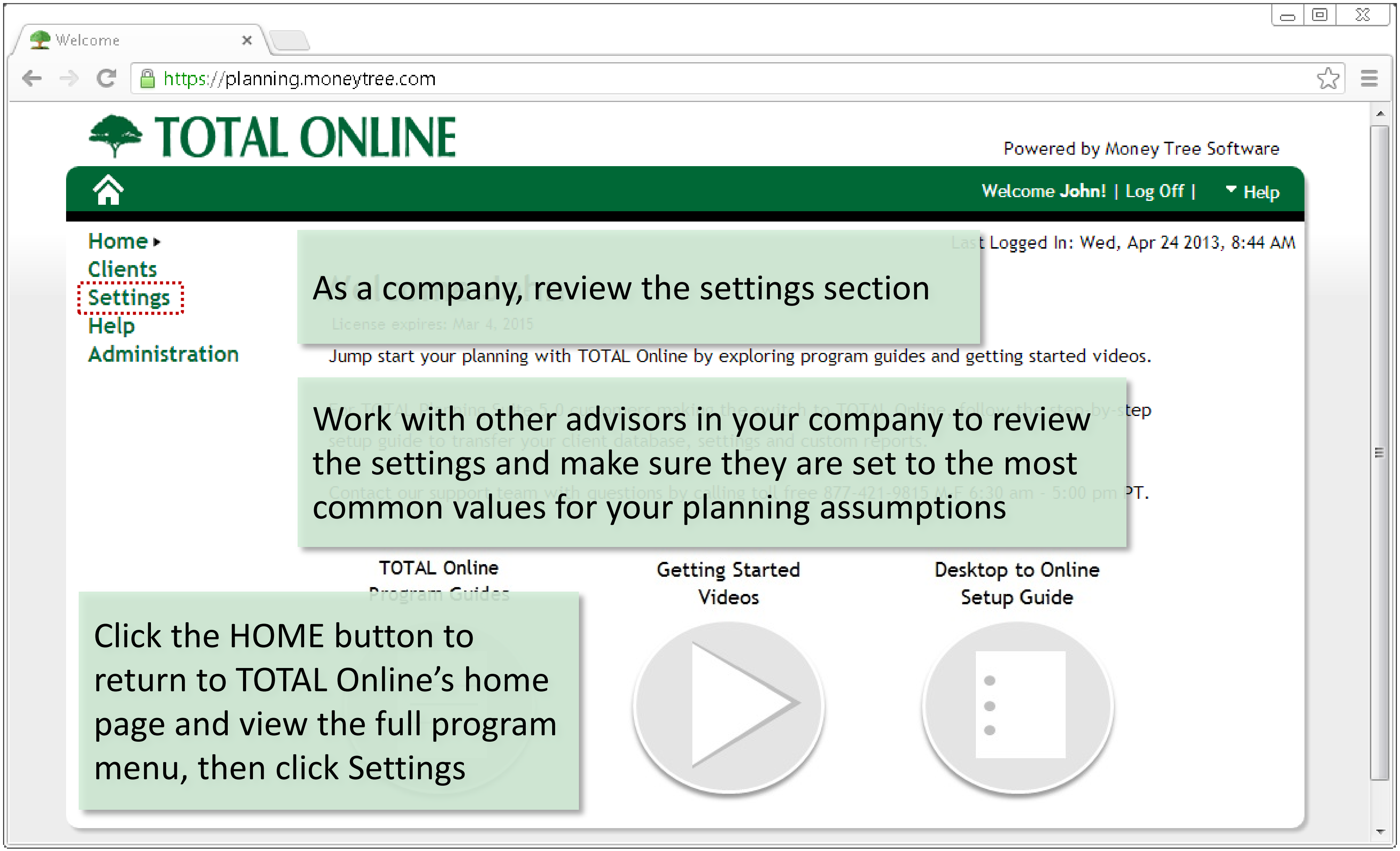
Step 5 Review Settings



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

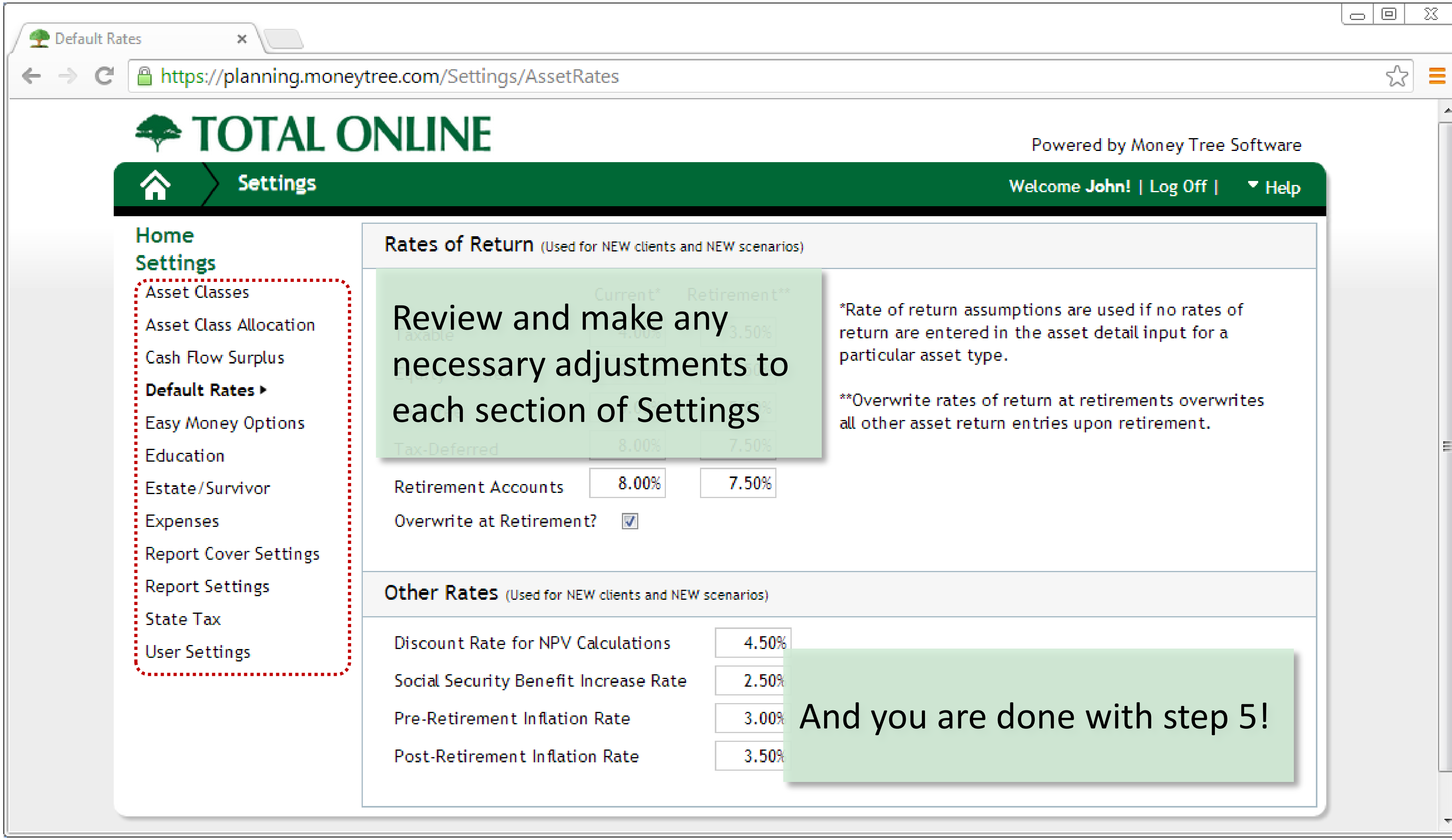


As a company, review the settings section

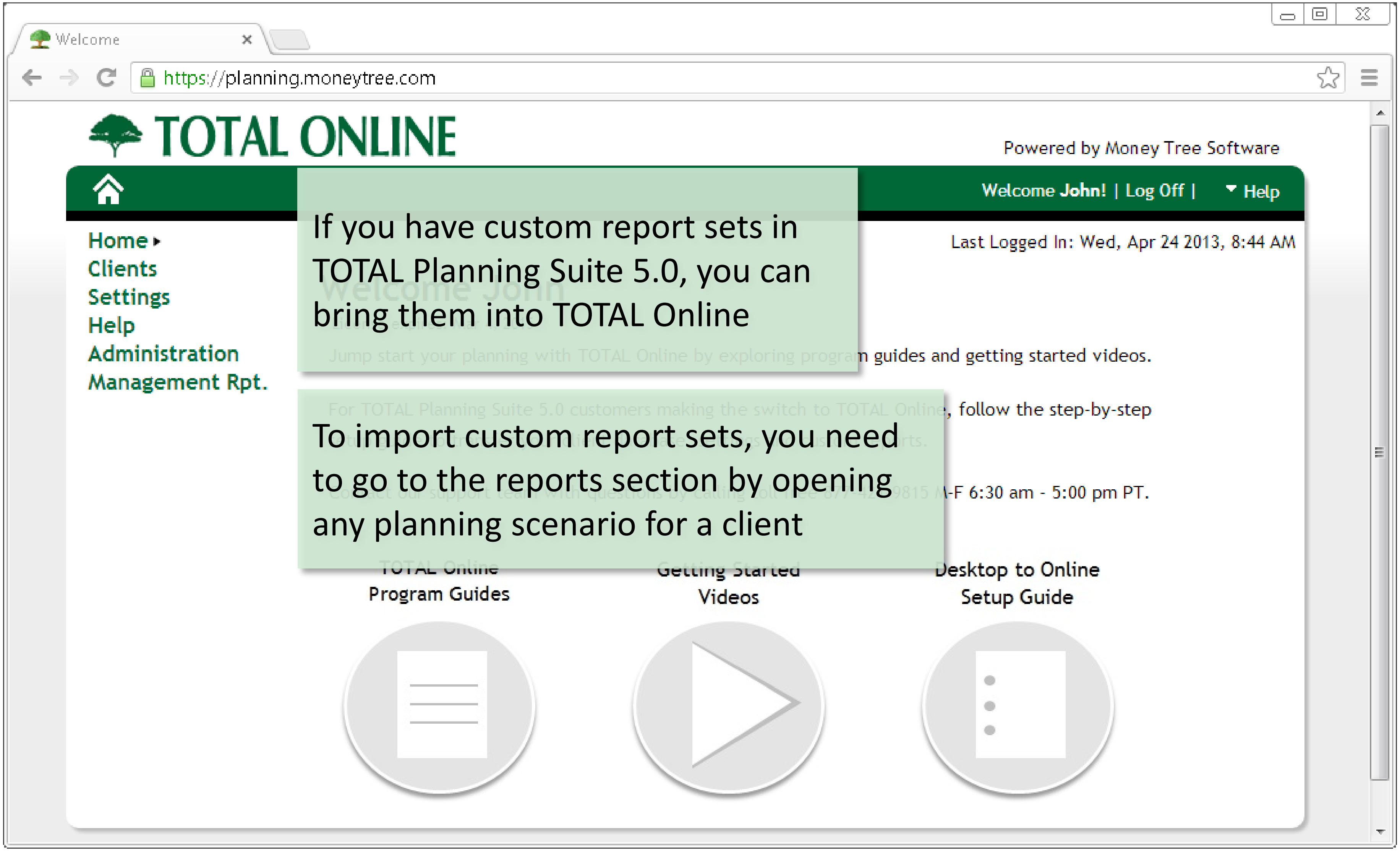
Work with other advisors in your company to review the settings and make sure they are set to the most common values for your planning assumptions

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

STEP 5 COMPLETE



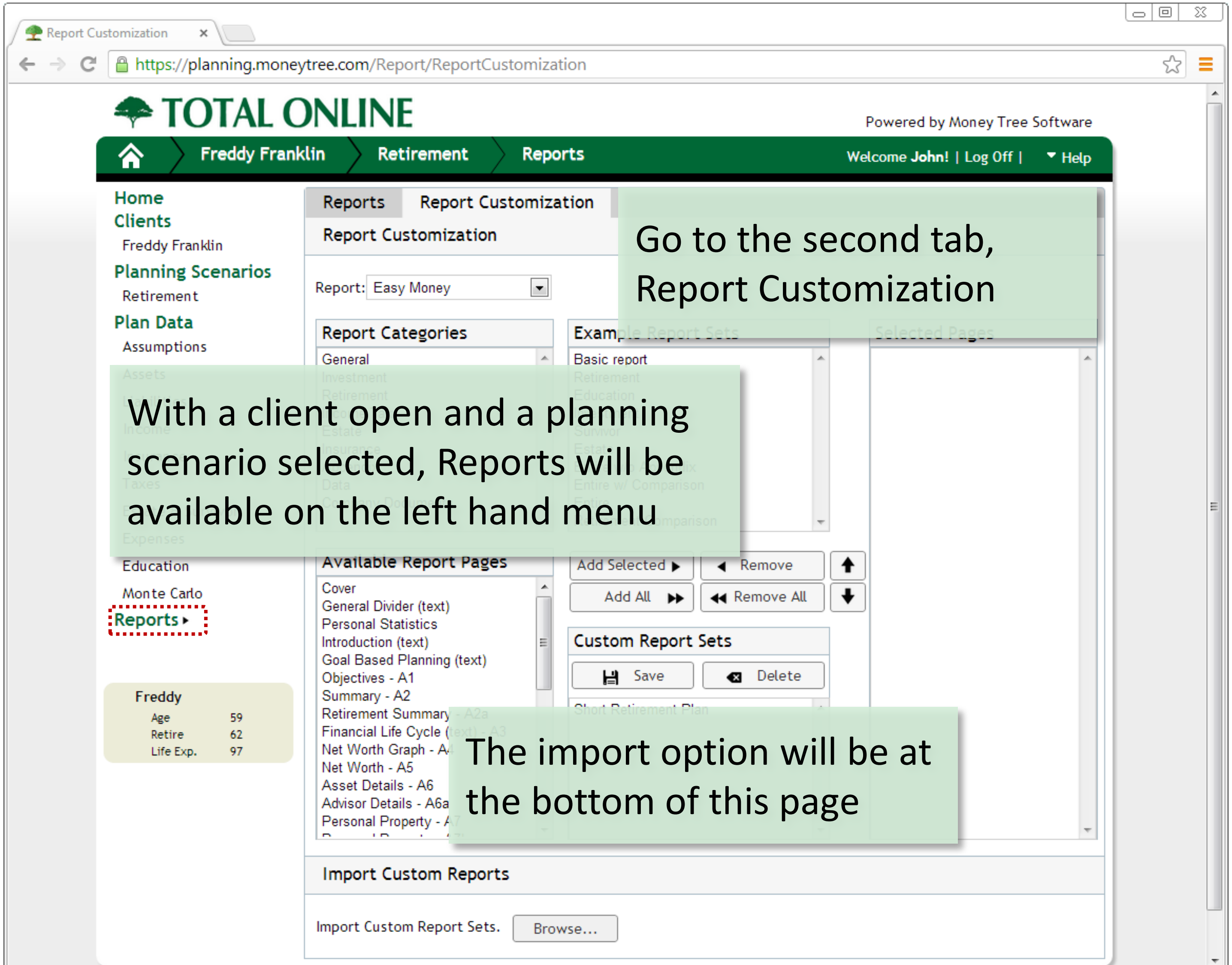
Step 6 Import Custom Reports



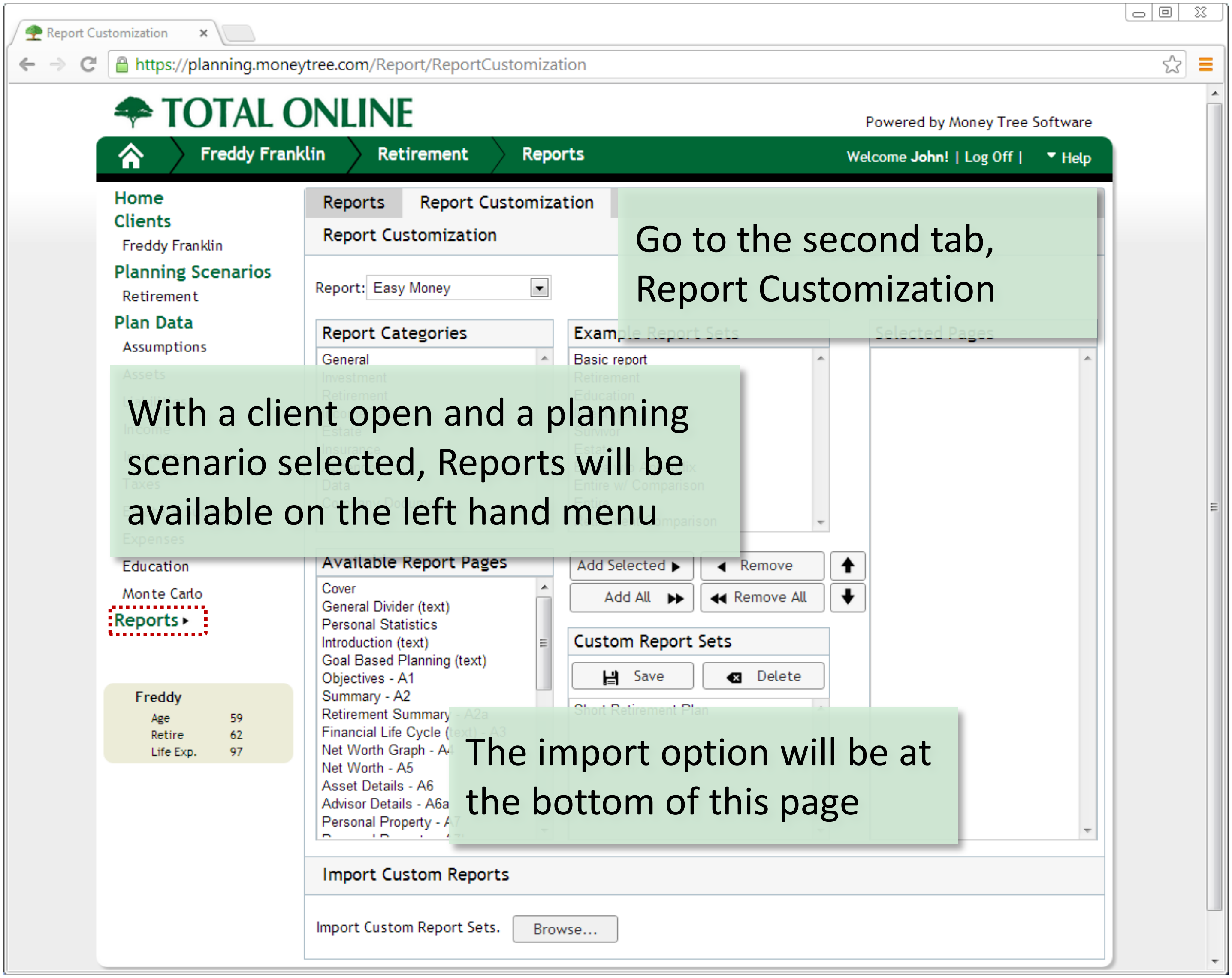
If you have custom report sets in TOTAL Planning Suite 5.0, you can bring them into TOTAL Online

To import custom report sets, you need to go to the reports section by opening any planning scenario for a client

Step 6 Import Custom Reports



Step 6 Import Custom Reports

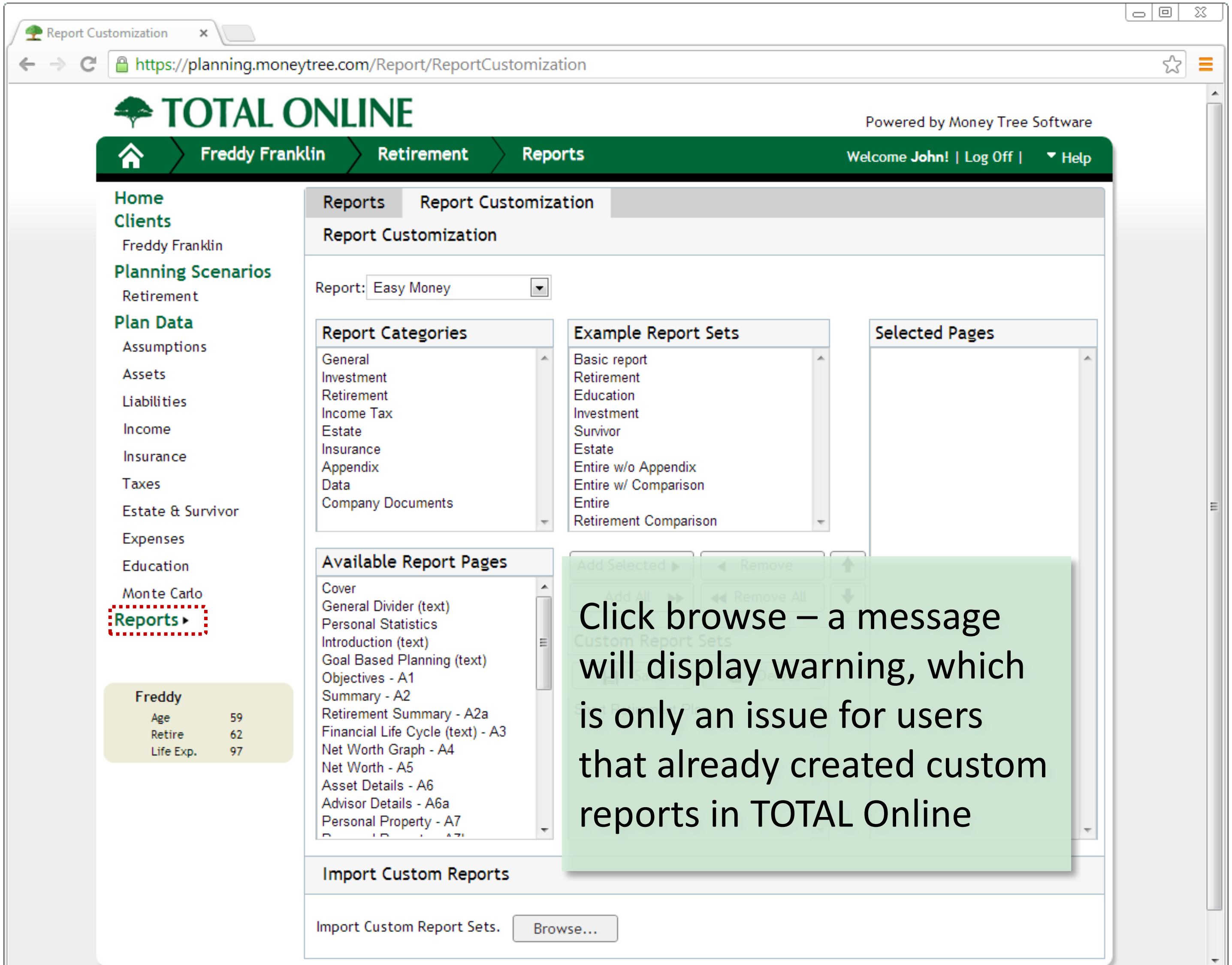


Go to the second tab, Report Customization

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



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

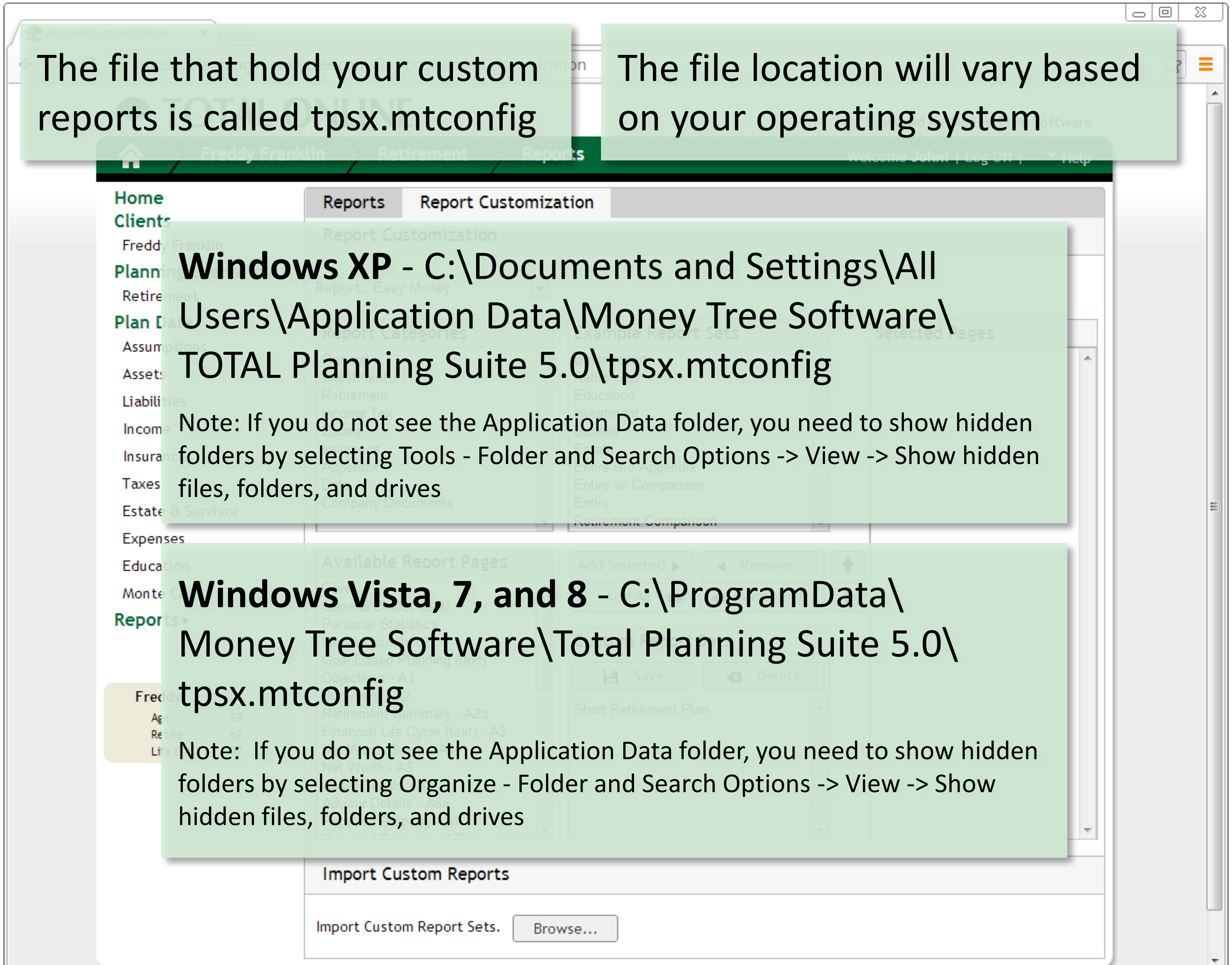
The file location will vary based on your operating system

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

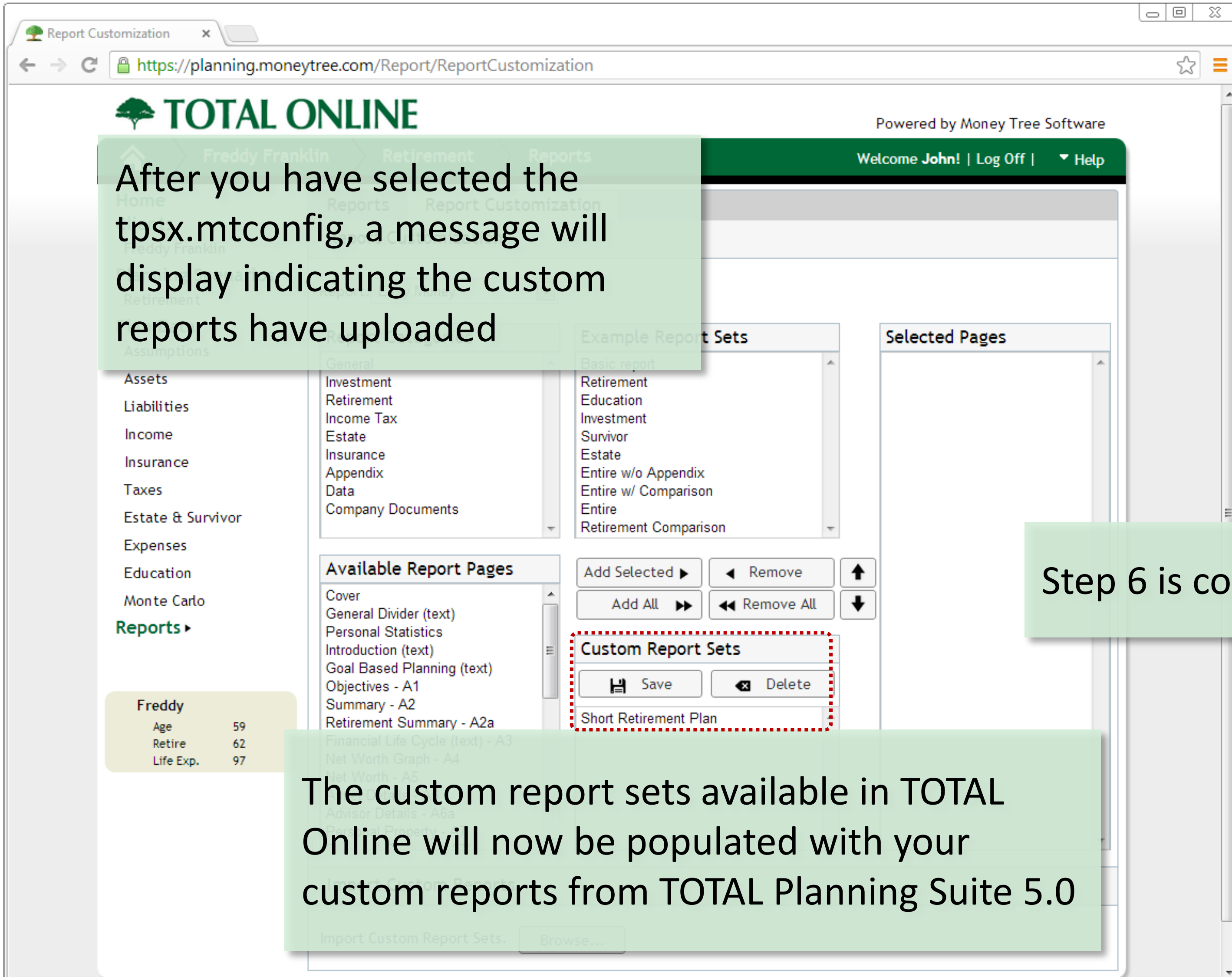
Note: If you do not see the Application Data folder, you need to show hidden folders by selecting Tools - Folder and Search Options -> View -> Show hidden files, folders, and drives

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



STEP 6 COMPLETE



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

Step 6 is complete!

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

You completed the Step-by-Step Setup Guide

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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