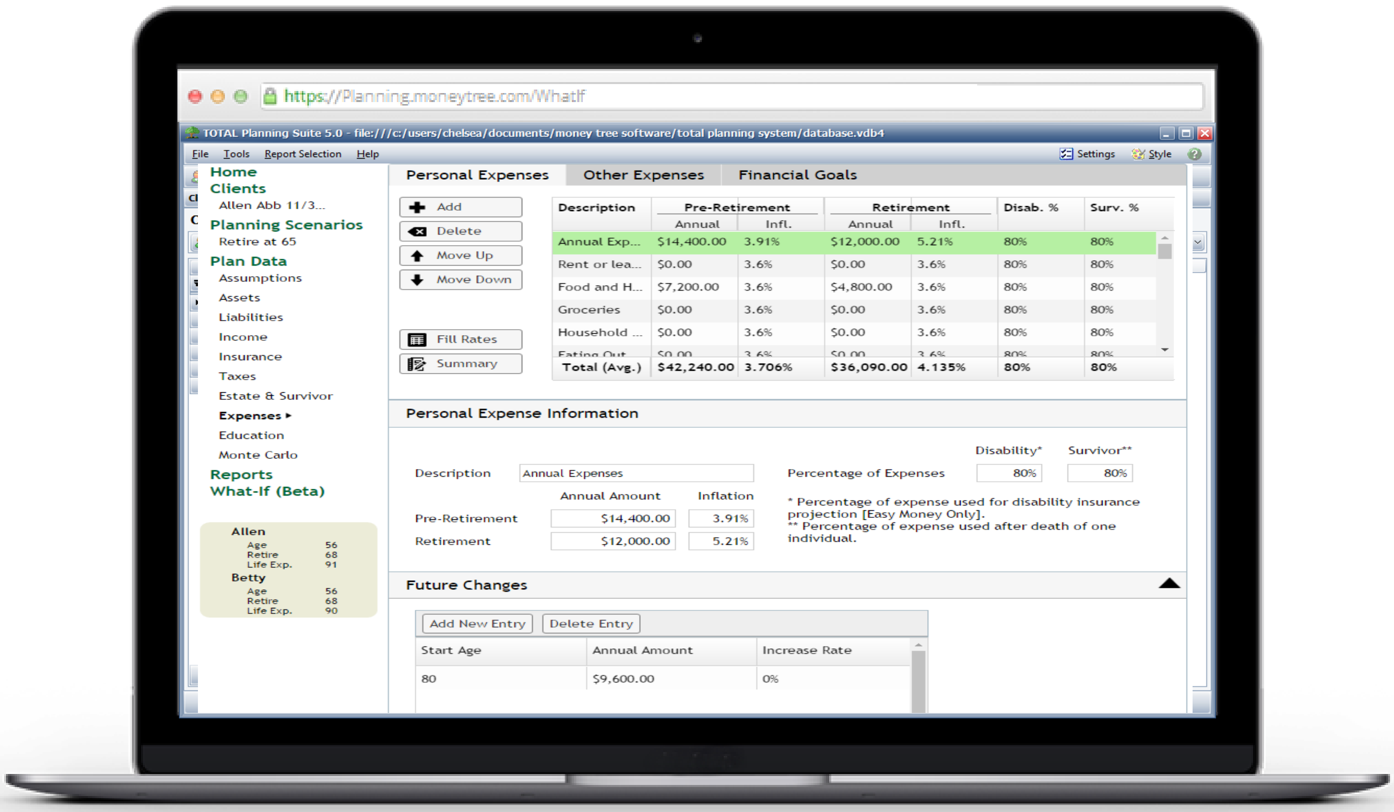
Entering Contact Data Introduction



MONEY TREE SOFTWARE™

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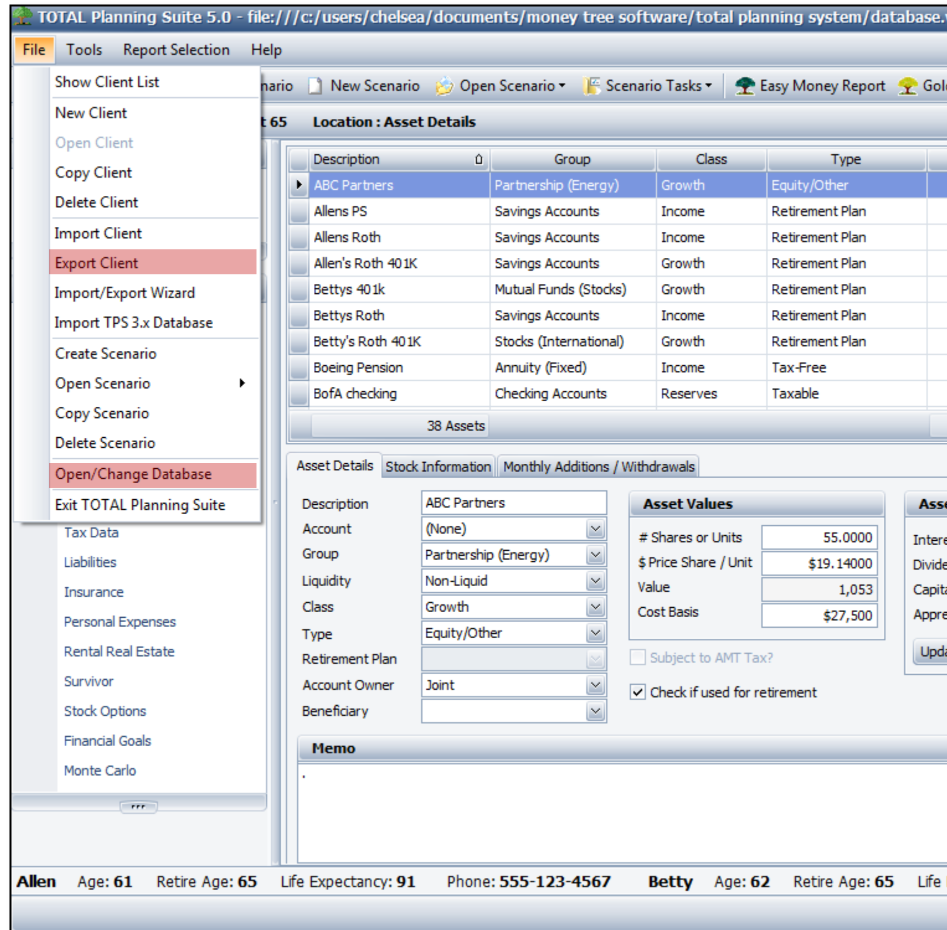
Main Menu: File

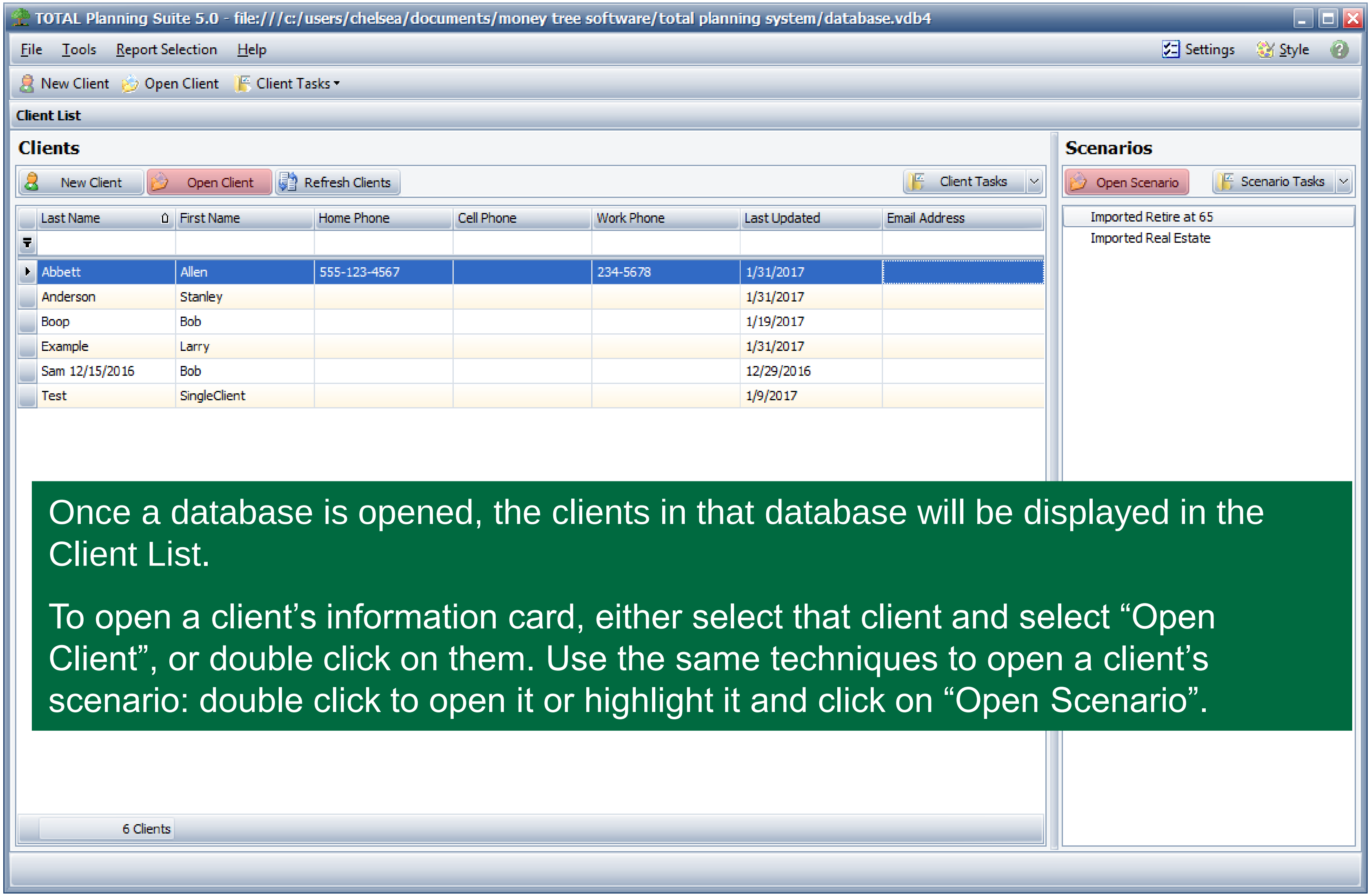
All contact functions are available under the File menu.

Use Export to create a contact file outside of the program, allowing you to move the file or import it into another Money Tree Software program.

Use the Open/Change Database to switch between databases or to add a new or empty database.



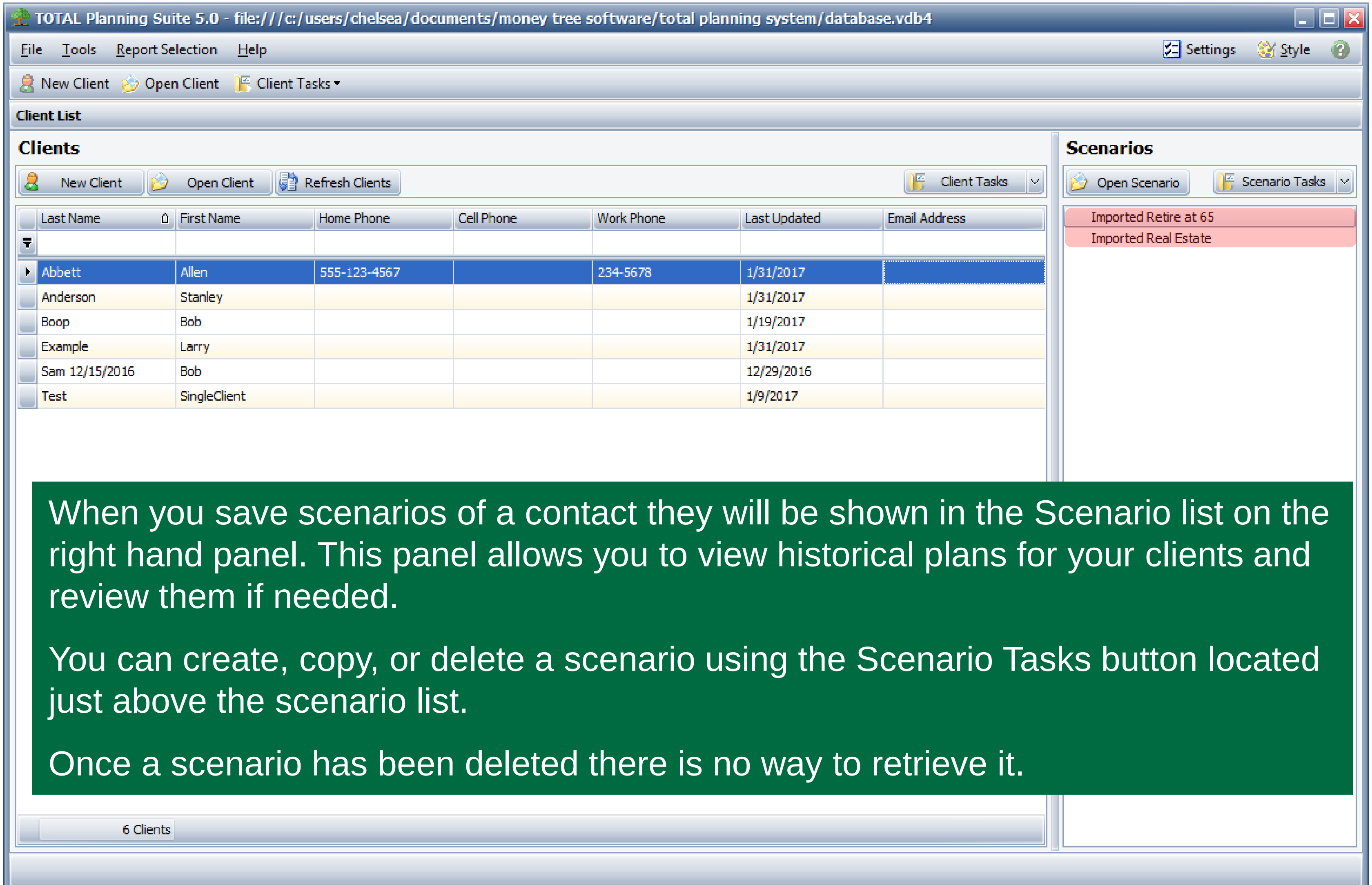
Contact List



Once a database is opened, the clients in that database will be displayed in the Client List.

To open a client's information card, either select that client and select "Open Client", or double click on them. Use the same techniques to open a client's scenario: double click to open it or highlight it and click on "Open Scenario".

Scenario List and Management

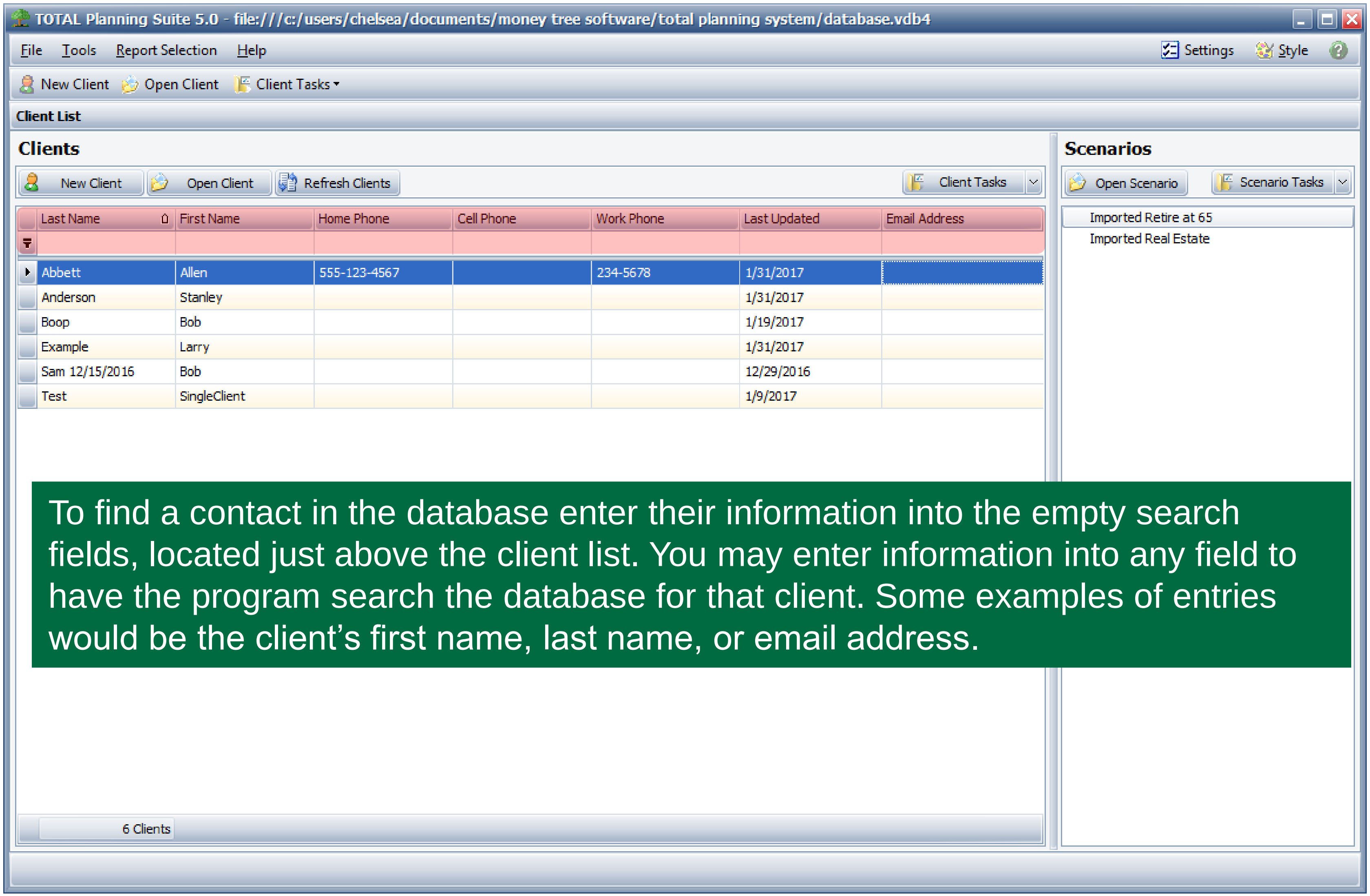


When you save scenarios of a contact they will be shown in the Scenario list on the right hand panel. This panel allows you to view historical plans for your clients and review them if needed.

You can create, copy, or delete a scenario using the Scenario Tasks button located just above the scenario list.

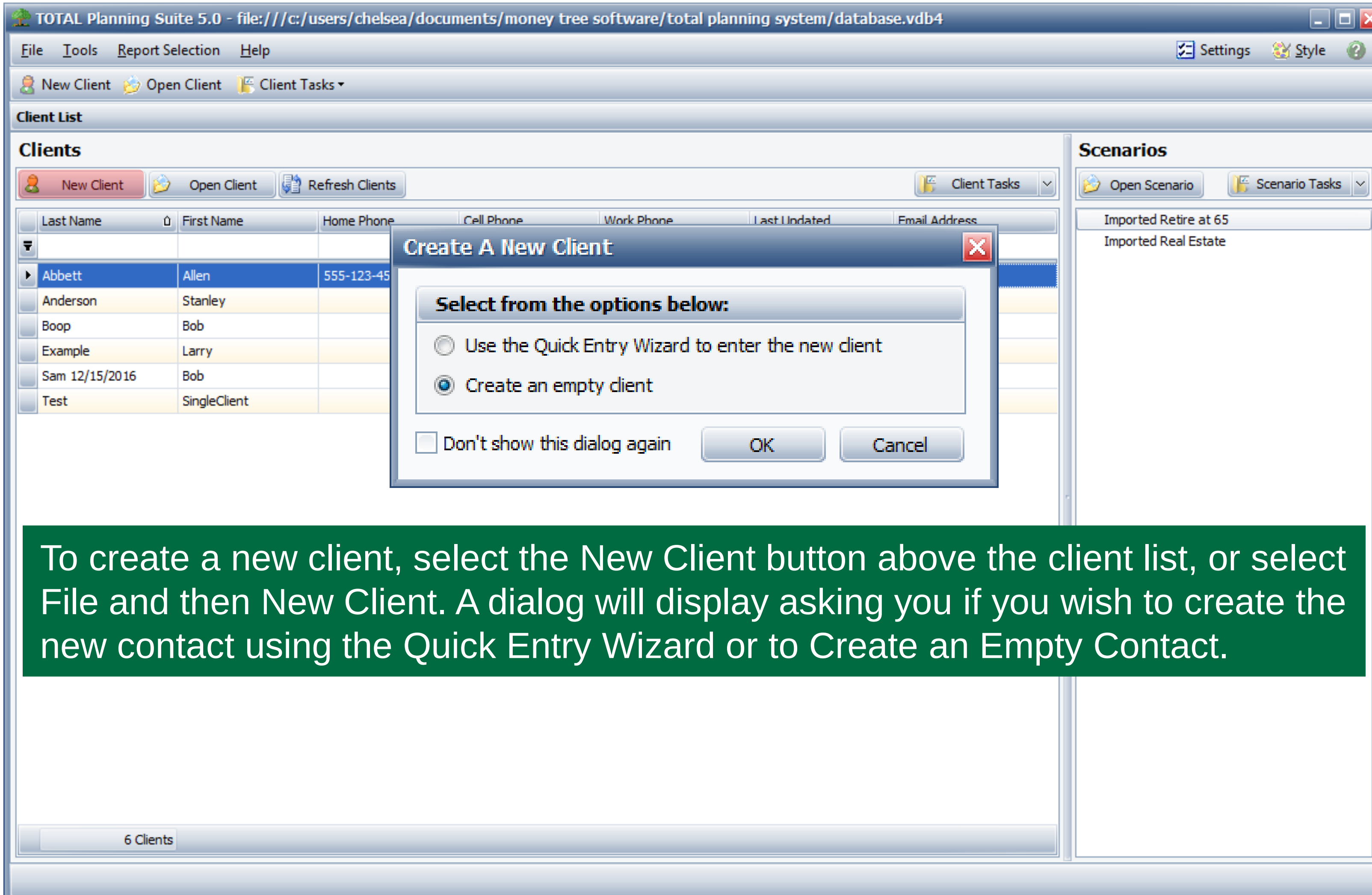
Once a scenario has been deleted there is no way to retrieve it.

Finding a Contact



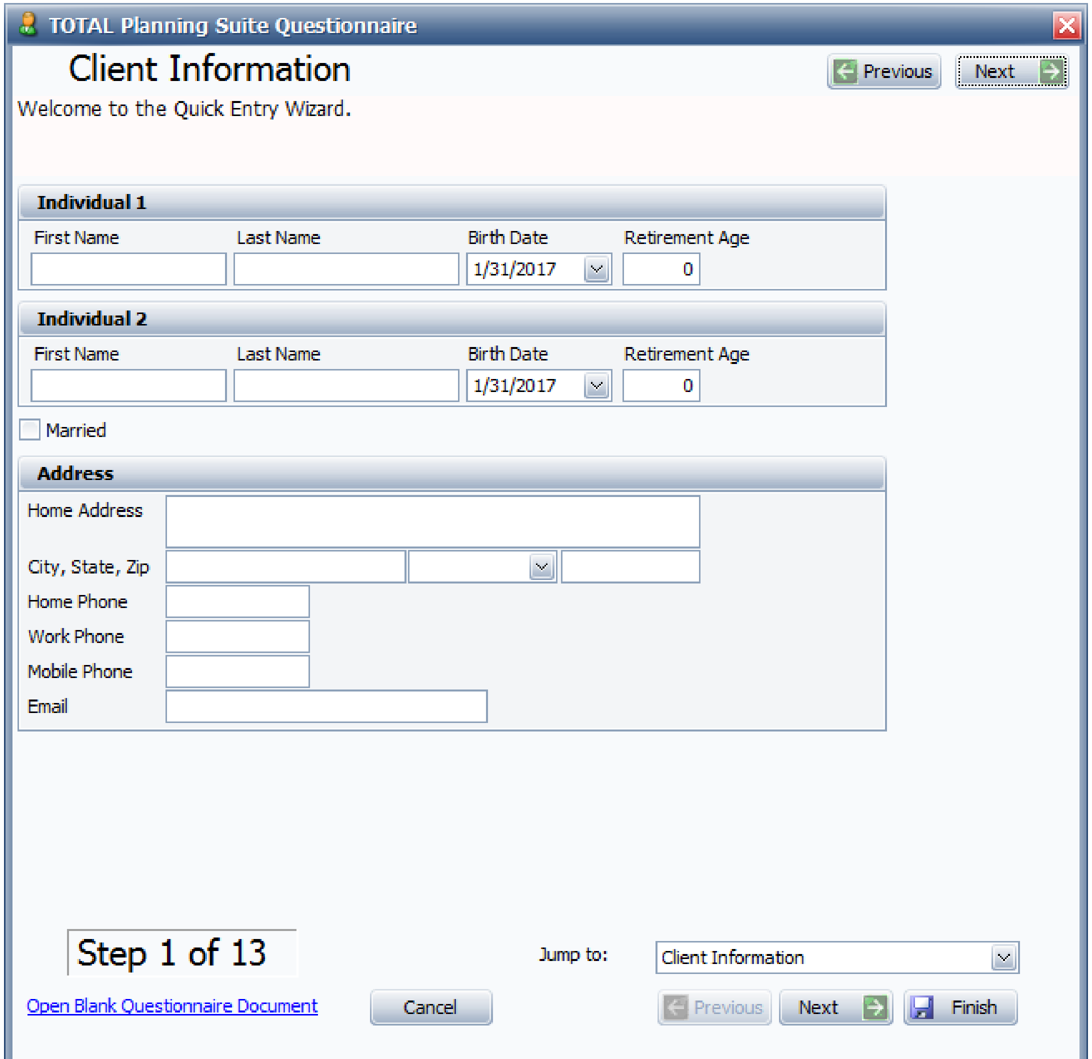
To find a contact in the database enter their information into the empty search fields, located just above the client list. You may enter information into any field to have the program search the database for that client. Some examples of entries would be the client's first name, last name, or email address.

Creating a New Contact



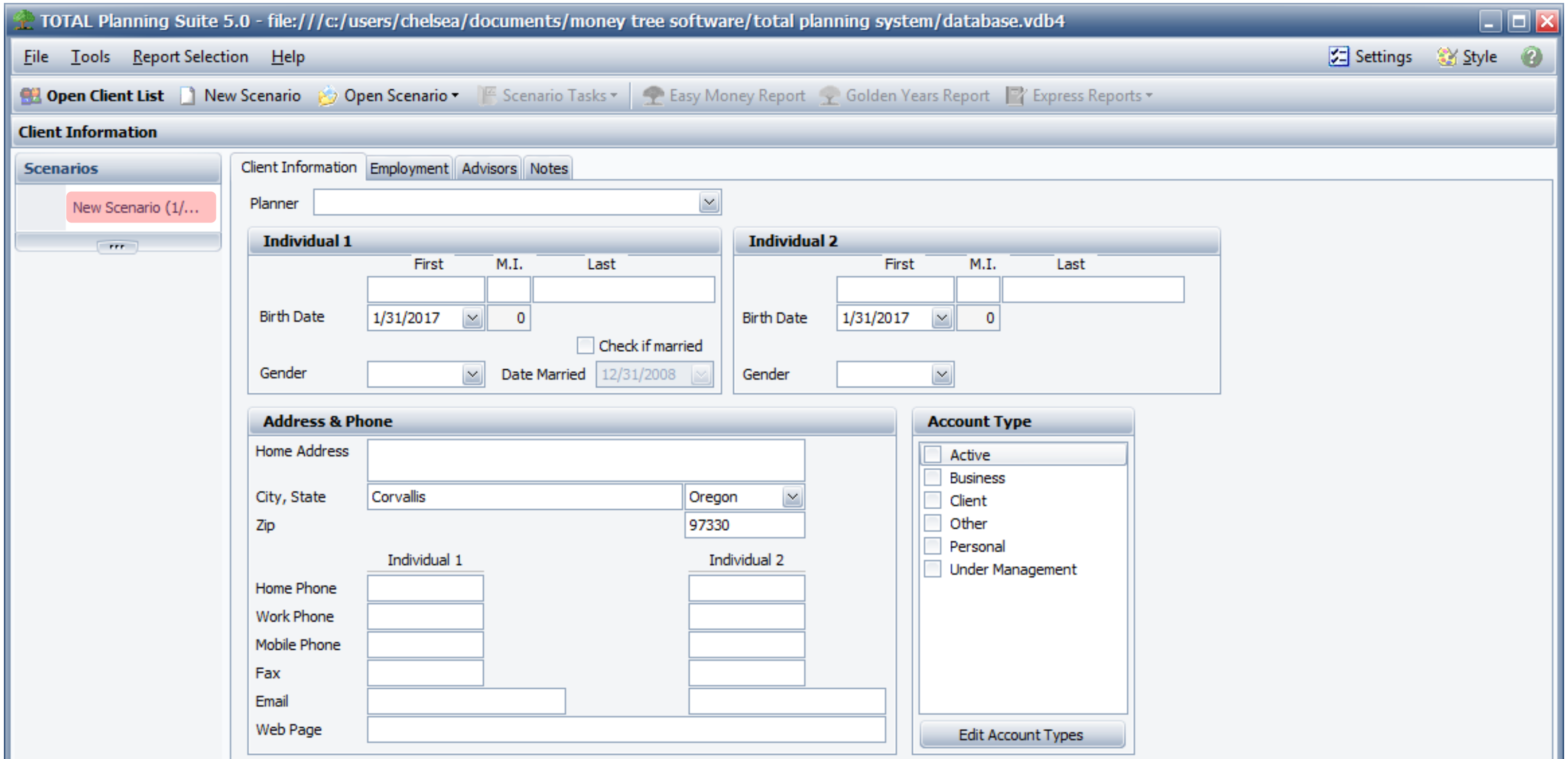
To create a new client, select the New Client button above the client list, or select File and then New Client. A dialog will display asking you if you wish to create the new contact using the Quick Entry Wizard or to Create an Empty Contact.

Creating a New Contact: Quick Entry Wizard



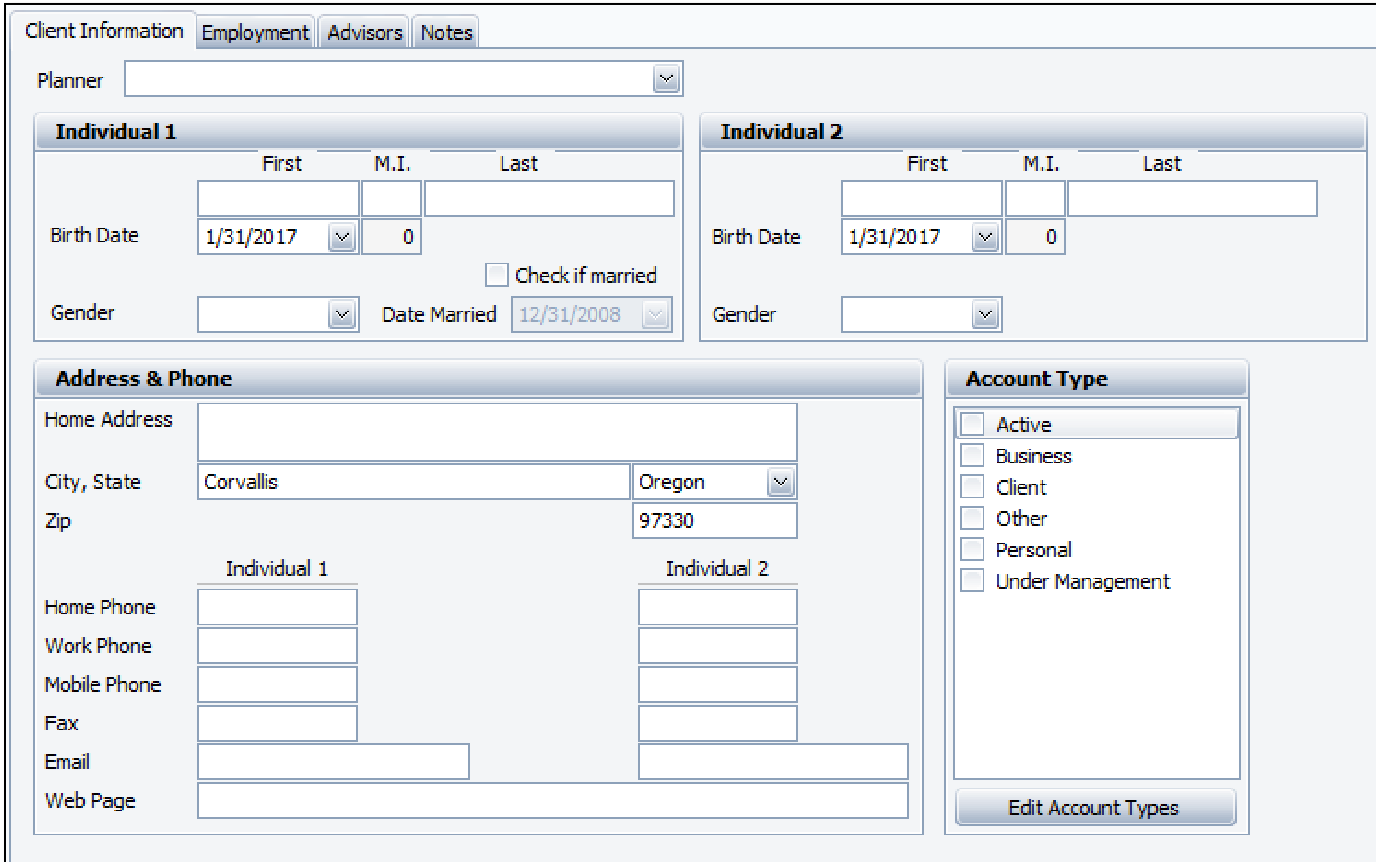
The Quick Entry Wizard will guide you through a one time 13 step wizard to input the client's essential information. This will include sources of income, assets, liabilities, and personal expenses.

Creating a New Contact: Create an Empty Contact



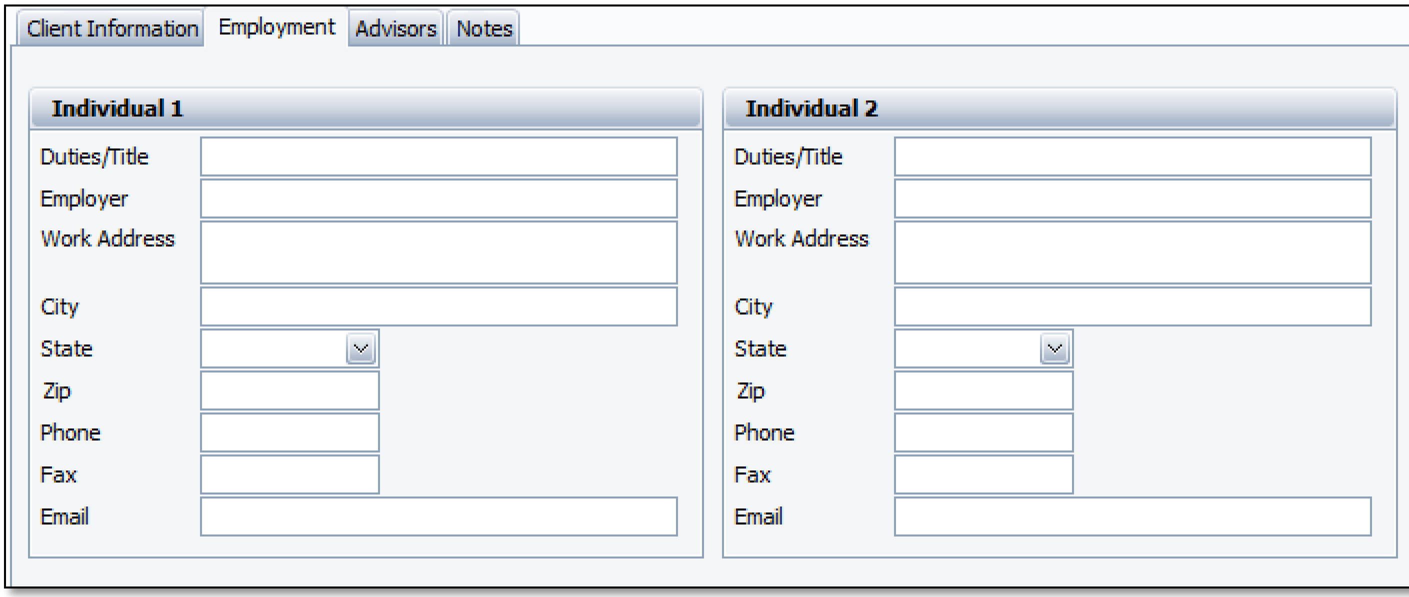
If you select "Create an empty client", you will skip the Quick Entry Wizard and go directly to the detailed data input. The program will start you on the Client Information tab and will create an empty scenario with the title "New Scenario" and the date the scenario was created.

Contact Information



Use this section to enter in characteristics of this client. The information in Individual 1 and 2's sections is used throughout the program for calculations and report pages. Address & Phone information will be on the Personal Statistics page within reports, but Account Type will only be for your information and will not be used in the reports.

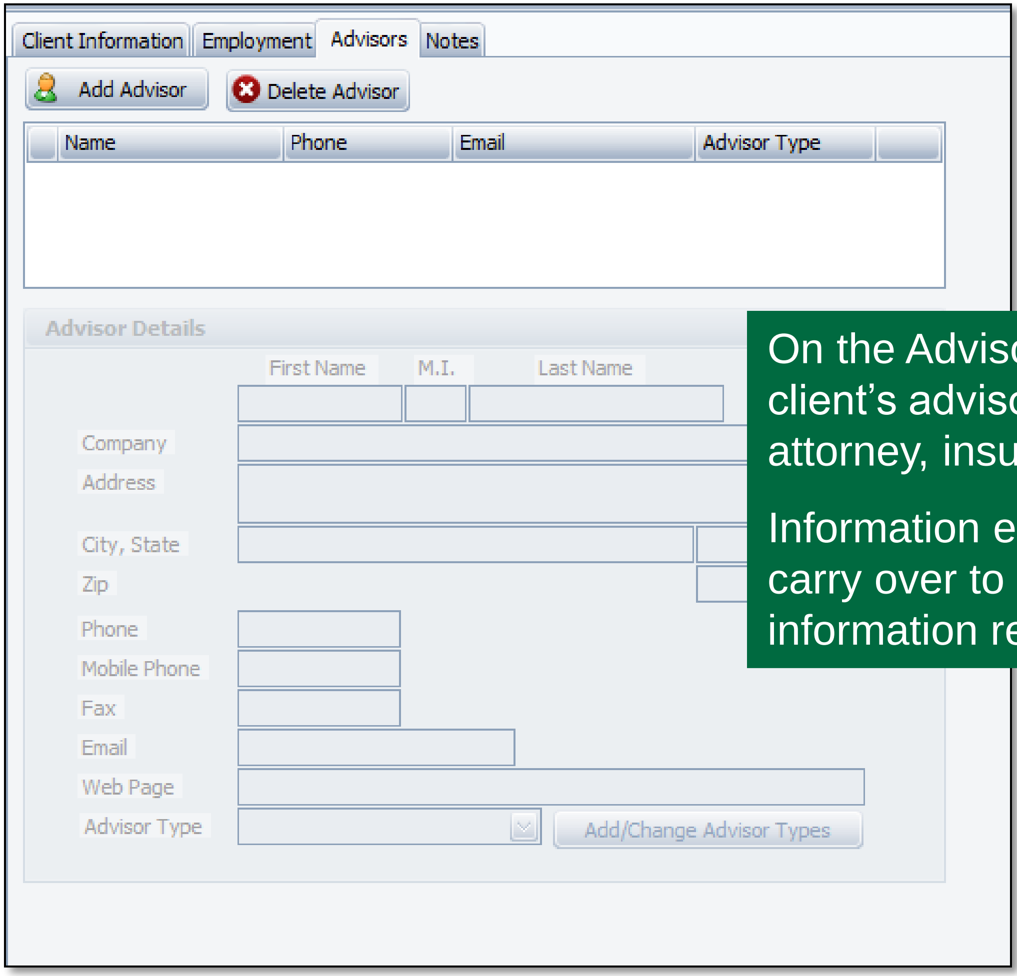
Employment



The second tab in this section is Employment.

Enter the client and spouse's employment information here. This information will be listed on the Personal Statistics report page.

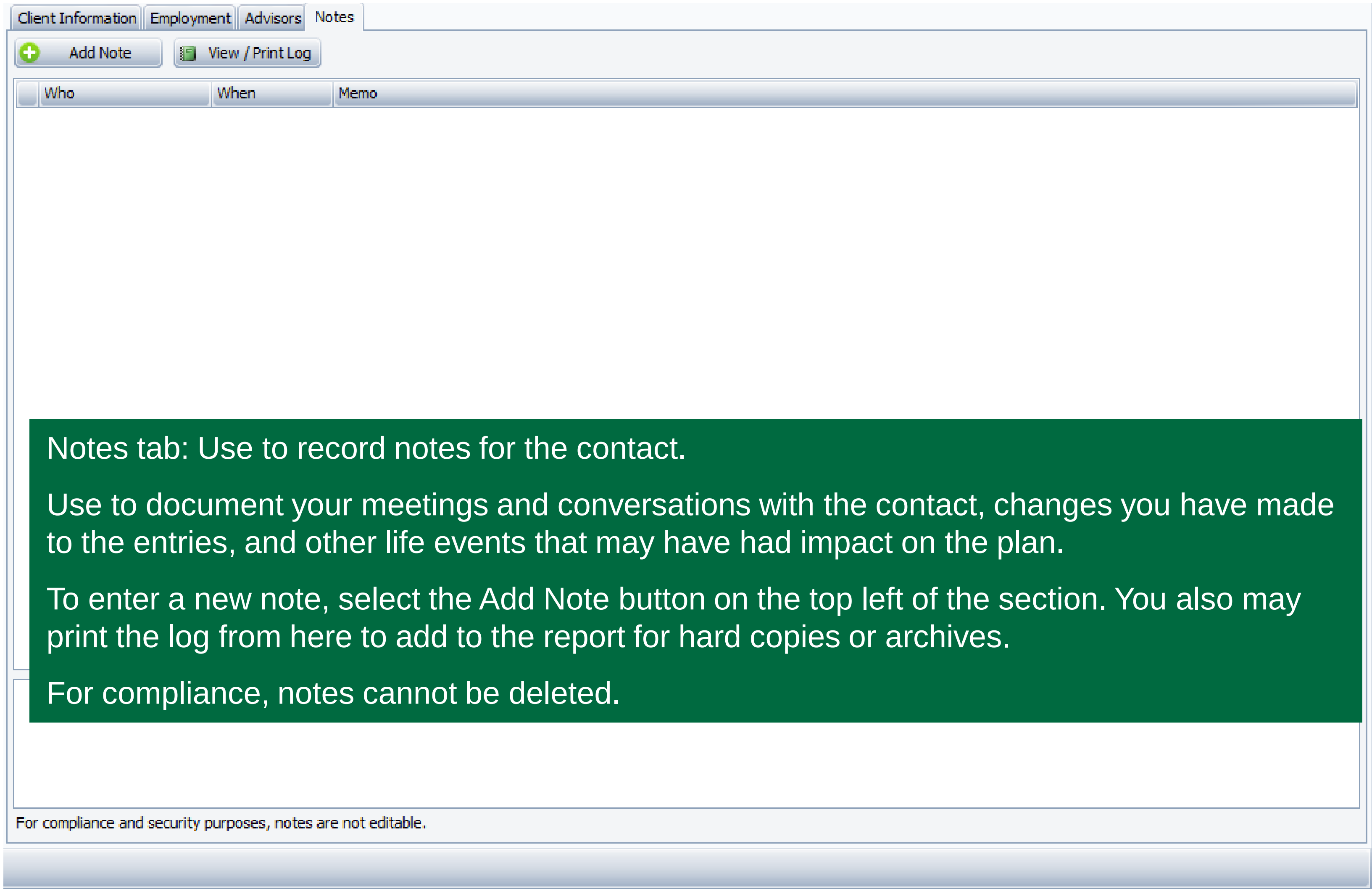
Advisors



On the Advisors tab, add the client's advisors – CPA, attorney, insurance, etc.

Information entered here will carry over to the advisor information report page.

Notes



Notes tab: Use to record notes for the contact.

Use to document your meetings and conversations with the contact, changes you have made to the entries, and other life events that may have had impact on the plan.

To enter a new note, select the Add Note button on the top left of the section. You also may print the log from here to add to the report for hard copies or archives.

For compliance, notes cannot be deleted.

Entering Contact Data

Thank you for taking the time to review the introduction to Entering Contact Data.

Questions?

Ask Money Tree's Support Team

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