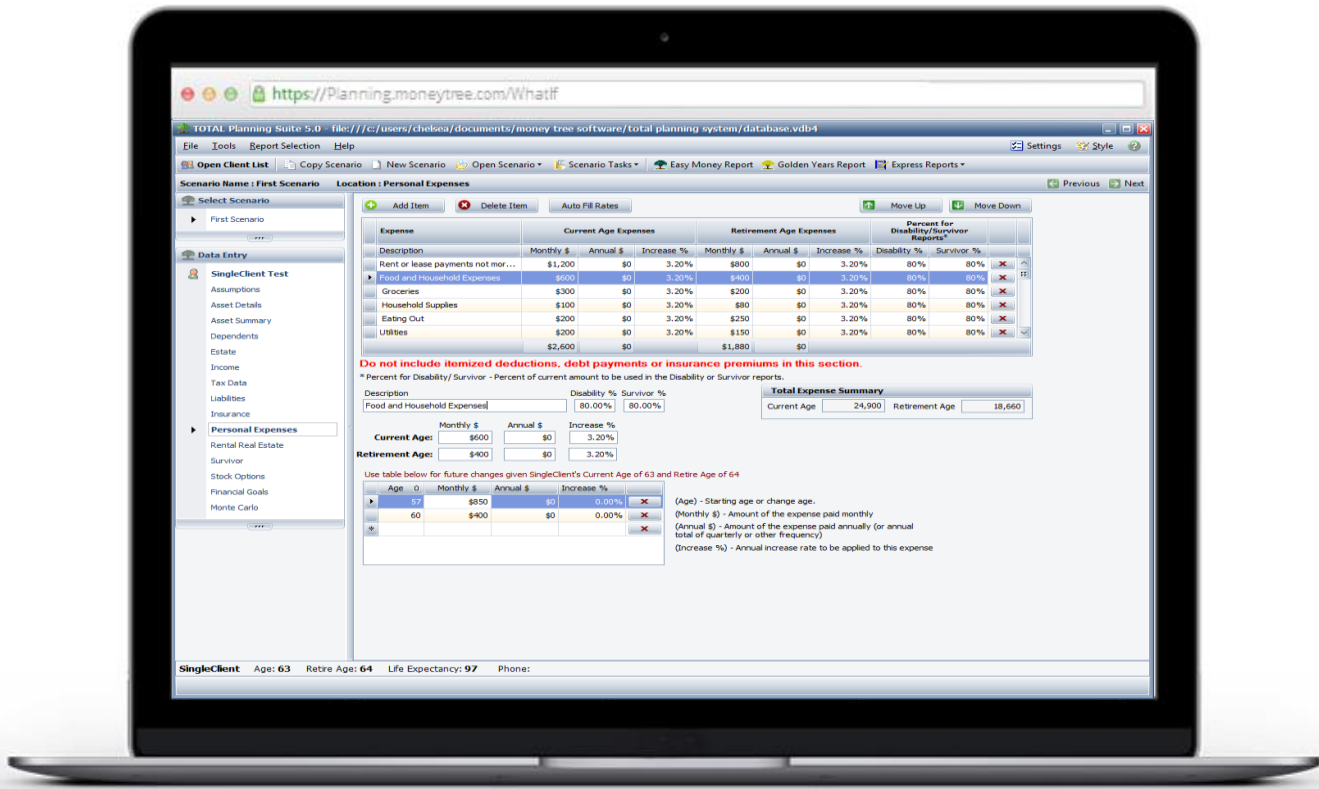


Total Planning Suite User Guide



Database Management

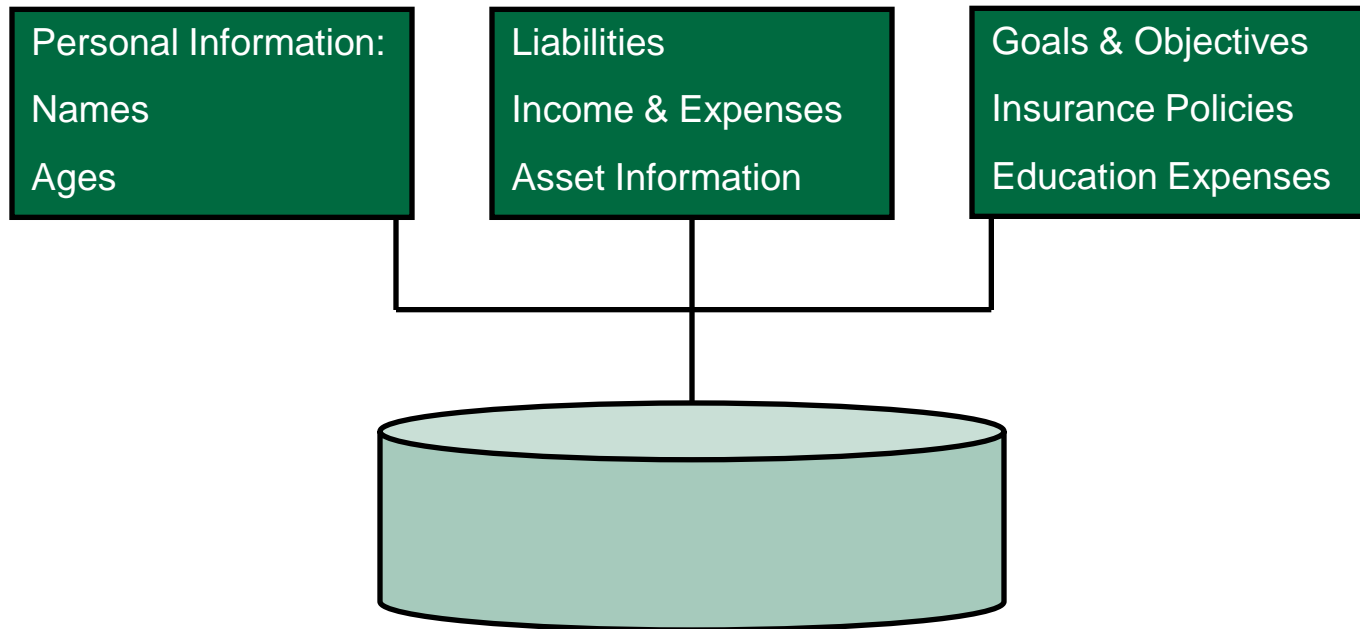
What is a Database?

- A file on your computer where all client files are stored.
- Some program settings are stored in the database file, such as state tax information and advisor settings.

Advantages to database file management:

- Easily retrieve data for any contact from one common location.
- Create and store multiple scenarios each with different data.
- Back up all contacts and program settings at once.
- Share data by moving the database to a location on the network.

Database



All client files are stored in the database, which means that client file management is done through the software instead of managing separate files on a computer. This also means that unless the database is backed up semi-regularly, and a scenario or client gets deleted, that file is not in the recycle bin in the computer. When you create a new client, any information entered for them is coded so that the program knows who that information belongs to within the database.

How to Create a Database

- When Total Planning Suite is installed, a default database is automatically created.
- The default location for a new database is:
C:\Users\<(youruser name)\Documents\MoneyTree Software\TOTAL PlanningSystem
- Create additional databases at any time, in any accessible location. Then treat the original database as an archive file.

Open / Change a Database

The screenshot shows the TOTAL Planning Suite 5.0 interface. The 'File' menu is open, and 'Open/Change Database' is highlighted. The main window displays scenario data for 'Imported Retire at 65' with client names 'Allen and Betty Abbett'. A green callout box points to the 'Open/Change Database' menu item.

Scenario Report Titles

Cover Page Date	1/10/2011
Scenario	Imported Retire at 65
Cover Name	Allen and Betty Abbett
Page Header	Securities offered by Asset Advisors - a Registered Investment Advisor
Easy Money Title	
Golden Years Title	

Net Worth Valuation Date

Show alternate valuation date for Net Worth report

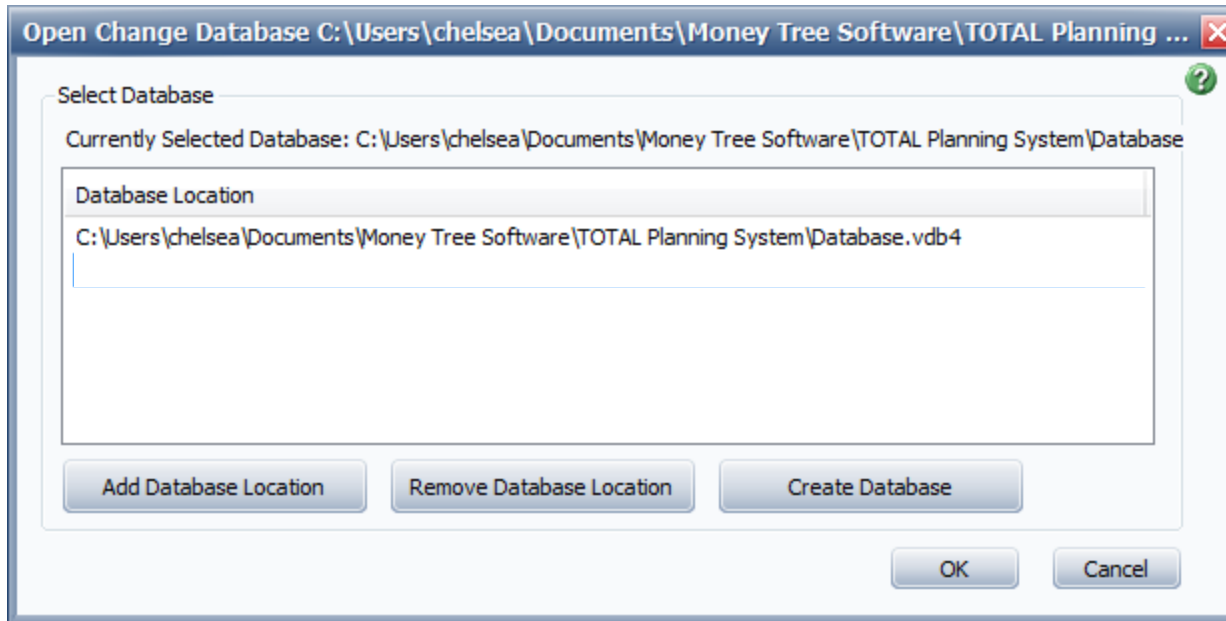
Date: 12/31/2010

Ages

	Individual 1	Individual 2
Retire Age	65	65
Life Exp	97	97
Alt Life Exp	91	90

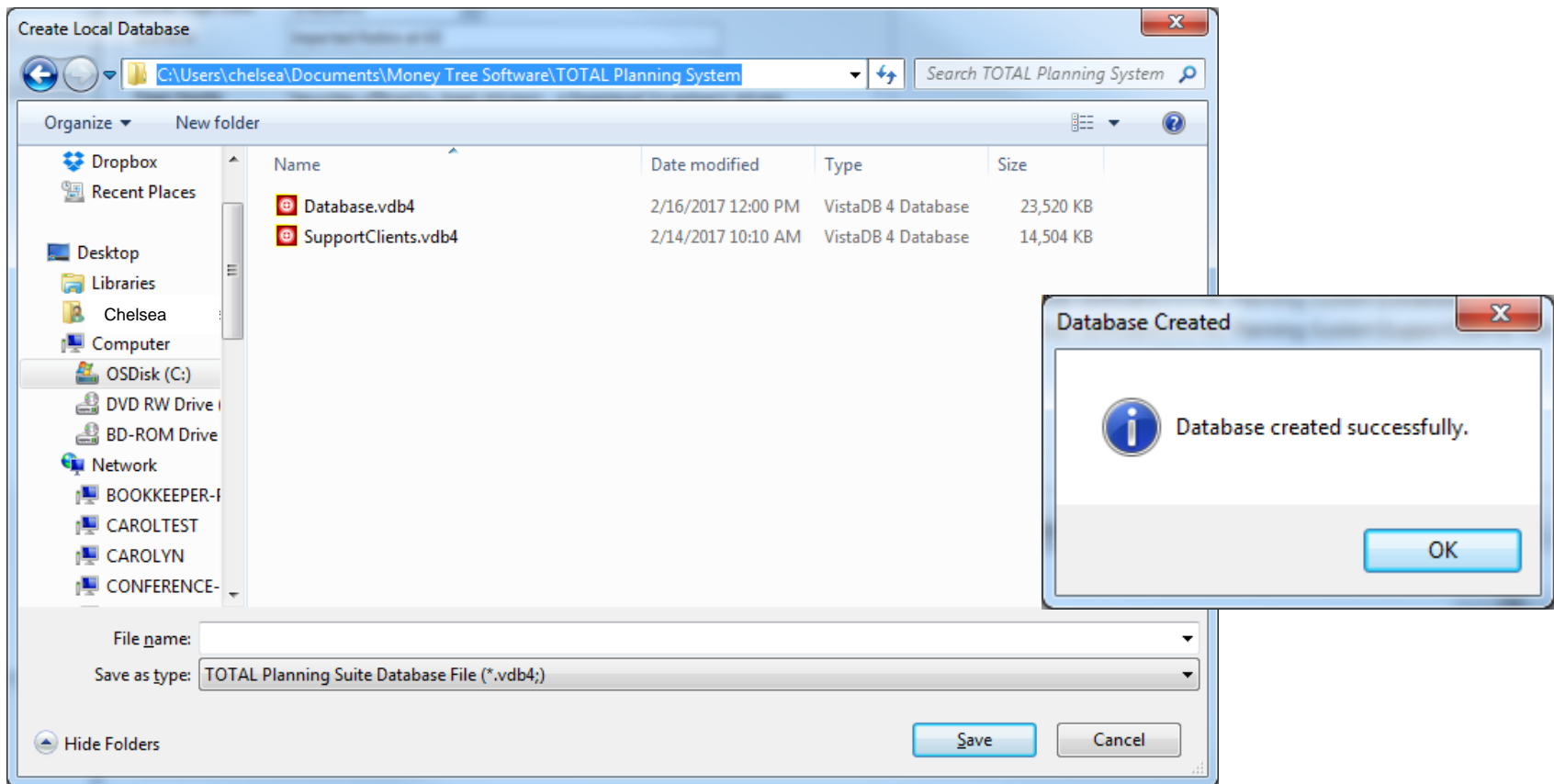
Allen Age: 61 Retire Age: 65 Life Expectancy: 91 Phone: 555-123-4567 **Betty** Age: 62 Retire Age: 65 Life Expectancy: 90

Create a New Database



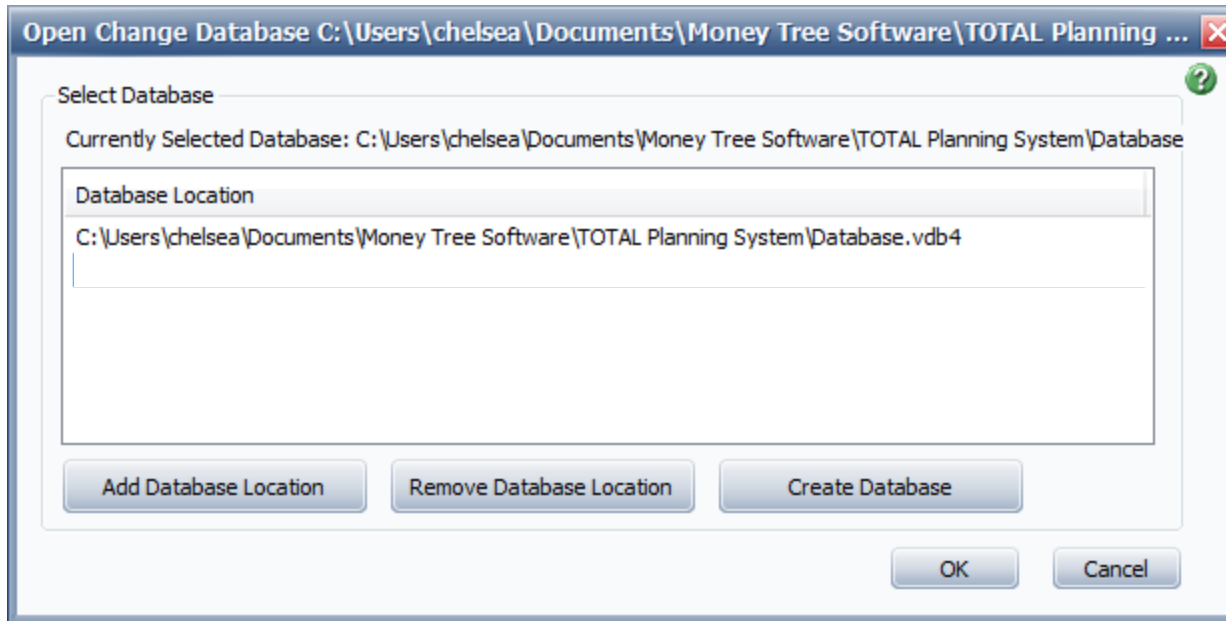
Select "Create Database" to create a new database.

Create Database Location



Enter a file name for this database in the "File Name" field and select "Save". This will return to the Open/Change Database dialogue. Confirm that database is highlighted and select "Ok" to open it.

Open an Existing Database



To open a database that already exists but is not in the database list already, select “Add Database Location” and navigate to the file location the database is stored in. Select “open”, which will return to the “Open/Change Database” dialogue. Confirm that database is highlighted and select “ok”.

Backing up a Database

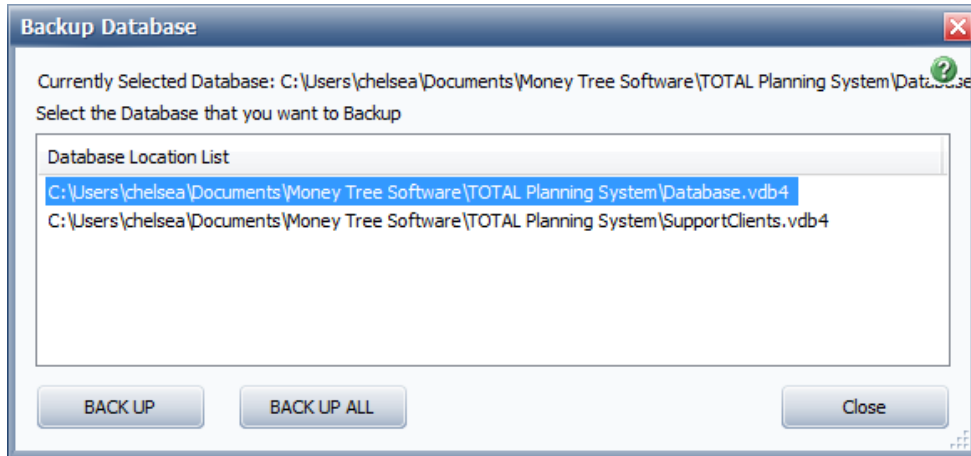
The screenshot shows the TOTAL Planning Suite 5.0 application window. The title bar indicates the file path: file:///c:/users/chelsea/documents/money tree software/total planning system/database.vdb4. The 'Tools' menu is open, and 'Backup Database' is highlighted in red. Other menu items include 'Settings/Defaults - New Contacts', 'Stocks/Mutual Funds', 'Import Company Documents', 'Change Password', and 'Database Administration'. The main window displays 'Scenario Data' with various tabs like 'Retirement Assumptions', 'Surplus Allocation', and 'Report Options'. A 'Scenario Report Titles' dialog box is open, showing fields for 'Page Date' (1/10/2011), 'Cover Name' (Allen and Betty Abbett), and 'Page Header' (Securities offered by Asset Advisors - a Registered Investment Advisor). Below this, there is a 'Net Worth Valuation Date' section with a checkbox for 'Show alternate valuation date for Net Worth report' and a date field set to 12/31/2010. An 'Ages' table is also visible, showing retirement ages and life expectancies for two individuals.

	Individual 1	Individual 2
Retire Age	65	65
Life Exp	97	97
Alt Life Exp	91	90

Allen Age: 61 Retire Age: 65 Life Expectancy: 91 Phone: 555-123-4567 Betty Age: 62 Retire Age: 65 Life Expectancy: 90

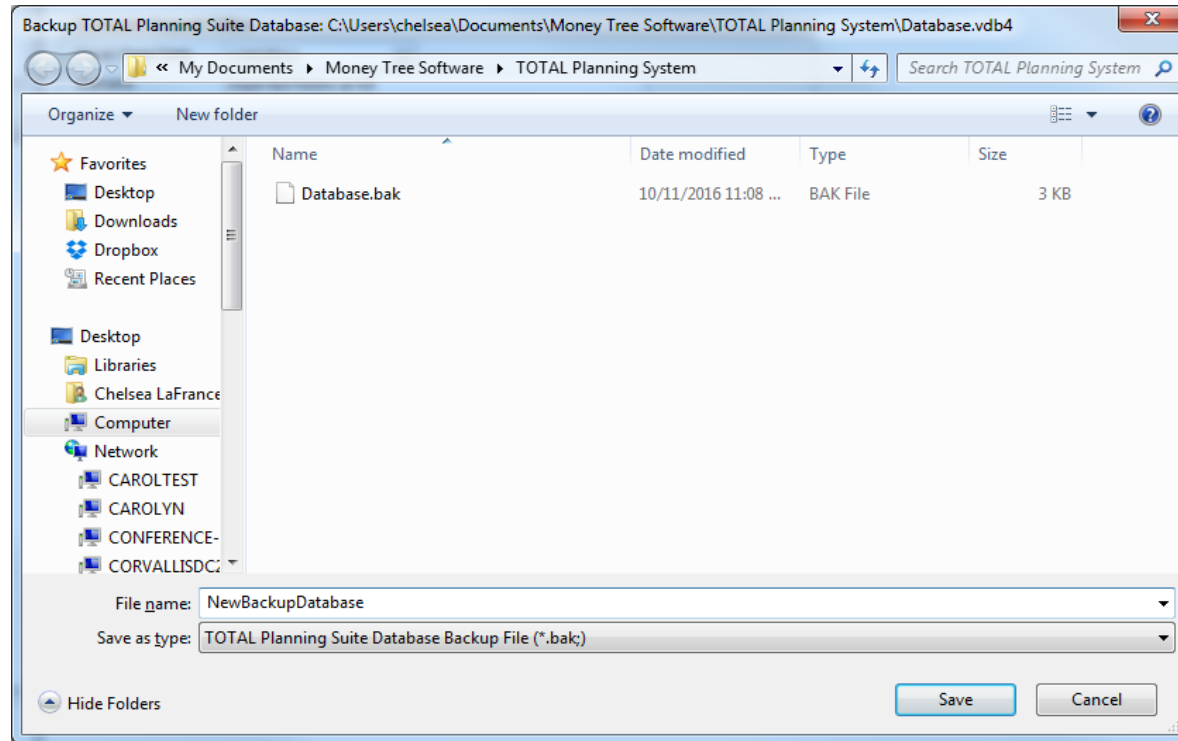
To create a backup version of the database, select "Tools" and then "Backup Database".

Backing up a Database – Continued



Choose to only back up one database or all existing databases.

Backing up a Database – Continued



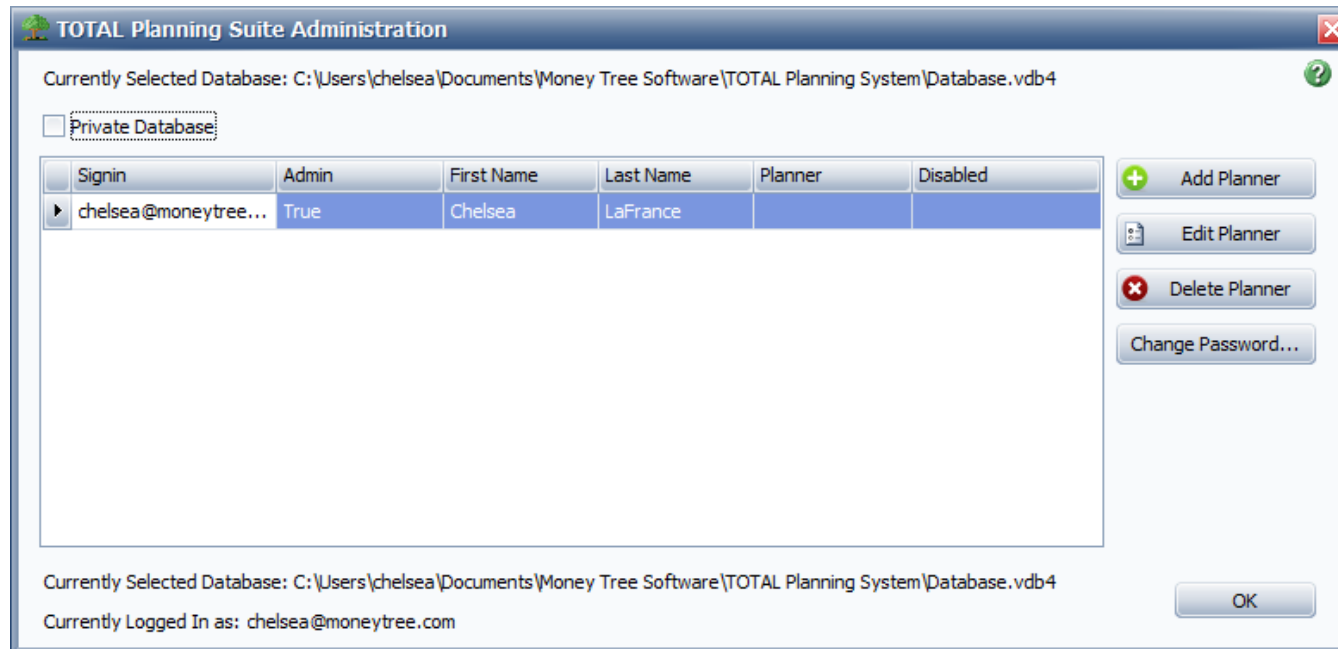
Select the location to save the back up to by navigating to it in the file explorer window provided and give the back up database a name.

The program will create a (.bak) file.

Database Administrator

- In an organization with multiple users, an administrator may be needed to control certain functions of database management.
- This could include limiting certain functions to individuals who should not have access to client files and information.

Private Database



It is possible to make a database private. To do so, select “Tools”, “Database Management” and then select the box at the top of the window for “Private Database”.

This will make it so that other users are not able to view the database. Also, if this private database is imported to a new computer without deselecting that box, it will not be possible to view it.

Database Management Guide

Thank you for taking the time to review the Database Management Guide.

Questions?

Ask Money Tree's Support Team

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