TOTAL Online

EASY MONEY GOLDEN YEARS

FAQs – Answers to frequently asked questions about TOTAL Online

Access TOTAL Online from anywhere, anytime, to dramatically improve your experience creating financial plans with a clear, streamlined interface, flexible input, user roles, and a customizable client portal.
TOTAL Online offers Easy Money Power Planner and Golden Years Cash Flow planning solutions.
FAQs are grouped by category. If your questions are not included here, contact our support or sales team.

Getting Started with TOTAL Online:

How do I access TOTAL Online?

Open your browser and enter the URL: planning.moneytree.com. Add planning.moneytree.com to your browser favorites. You can also visit moneytree.com and click the "TOTAL Online Login" button to be directed.

How do I sign in?

Your sign in consists of your username (email address) and a password. Account sign ins can be created by 1) using New User Signup or 2) asking your program administrator to create your sign in.

- Use option (1) if no one in your company has a TOTAL Online account and you are not already a subscriber. Create a login by clicking New User Signup on sign in window. This will allow you to create a new company account and sign in, starting a 30-day free trial.
- Use option (2) if anyone in your company already has a TOTAL Online account. Any user set as an administrator can create a sign in for you. This will allow you and your coworkers to work within the same company account with shared planning defaults and data. Note, user roles are available to set custom permissions for each user.

Can I try TOTAL Online before deciding to switch?

Yes. New user signups include a fully functional 30 day trial license.

What's the best way to learn TOTAL Online?

Videos and user guides are available to help you quickly start planning using TOTAL Online. To access these helpful guides, login to TOTAL Online or visit the guides and videos on our website. We suggest going through the process of entering a plan for yourself or a familiar client to get started with the online platform. If you have questions while using TOTAL Online, take advantage of our support team to get answers quickly by calling 877-421-9815 ext. 0 or emailing support@moneytree.com

Transferring from Desktop to Online Edition:

For detailed instructions including screenshots, view the Setup Guide.

Can I import all of my clients at once?

Yes. If you are transferring from the desktop edition to the online edition, you will have the opportunity to import your TOTAL Planning Suite 5.0 database, which includes all client data and program settings.

Will my settings, including State Tax, import?

Yes, if you import your TOTAL Planning Suite 5.0 database, your settings information, including state tax rates, will be transferred to TOTAL Online.

Am I required to import my TOTAL Planning Suite 5.0 database?

No, you can choose to make a fresh start and import only the client files you need individually into TOTAL Online. In this case, you would also need to manually configure the program settings/defaults.

Can I transfer my custom report sets?

Yes. The option to import your custom reports is available under Reports, Report Customization. Contact support for assistance if you need any help locating the file that holds your TOTAL Planning Suite 5.0 custom report data.

Desktop Edition vs. Online Edition:

Will you maintain both the desktop and online edition?

Yes. Both the desktop and online edition will be available. The online edition will not replace the desktop edition.

Does TOTAL Online include features that are not available in the desktop edition?

Yes, TOTAL Online introduces five new features in addition to the cloud based platform and the redesigned data entry, listed below. You can also watch a five-minute a video reviewing the new features.

1. **User Roles** – Through customizable user roles, program administrators can define how staff uses the program.
2. **Company Branding** – Quickly personalize TOTAL Online for your company by including a company logo and selecting color scheme using a built in website customization option.
3. **Customer Access** – Provide your clients access to data and reports anywhere, anytime using the customer access portal.
4. **Improved Integrations** – 3rd party integrations are newly designed for TOTAL Online and improve the process to streamline your data entry.
5. **State Tax Rates** – Planners can elect to have Money Tree update the state tax rates annually.

Does TOTAL Online include everything from the desktop edition?

No, but it’s very unlikely you will miss anything not included. In an effort to streamline data entry and protect client information, a few data items available in TOTAL Planning Suite 5.0 are not included in TOTAL Online.

For example, you will not find an entry for SSN on Client Information. Express reports from the desktop version are not available, but have been suitability replaced by summaries throughout the data entry.

Are the reports the same?

Yes. The desktop and online editions share the same trusted calculations and reports.

Why would I switch from the desktop to the online edition?

Many businesses are moving to cloud computing due to its increased efficiently and flexibility. Many advisors prefer cloud based software due to a number of benefits, including the following:

- Universal access – Access the software from anywhere you have an internet connection – whether you are on the road, in the office, or at home, running a PC, Mac, or Tablet.
- Increased collaboration – Easily share the client latest plans and reports.
- Automatic Updates – The online version is automatically updated with the latest changes and features.
- Security – With cloud-based software, the data does not reside on your computer, instead it resides in a secure data center. If your laptop is stolen for example, your data is safely stored in the cloud.
- Reduced IT efforts – Because there is no software to install or license, and the data resides in the cloud, switching to a new computer requires little or no IT effort.
- Increased resiliency – If your hard drive is toast, or your office is flooded, you software and data isn't lost. You can be back to the business of planning in no time.

As a desktop user, will I be able to understand the redesigned data entry quickly?

Yes. The data input does have a new flow to collect the information in a more efficient manner. The data input has been designed to allow clear data input for typical cases, and expanded entry options for cases that require more details. We have a detailed tutorial covering each change from the desktop edition for your review.

Is it fast?

Yes. The data input is very responsive providing the ability to move rapidly through the program. The entire set of Golden Years or Easy Money reports generates in about 30 seconds.

Is it secure?

Yes, TOTAL Online meets or exceeds industry standards for physical and electronic data security. TOTAL Online features bank-level 128-bit encryption and physical security to keep data safe. Read more about TOTAL Online's Security.

What can my customers do in the client access portal?

Your customers can review the plan data and generate pre-defined reports. Clients cannot enter or adjust data used for the plan at this time.

What integrations are available?

Albridge, Advent, Aqumulate, Schwab Portfolio Center, TD Ameritrade Institutional, Act 4 Advisor, Precise FP, Redtail. Integrations will be continued to be added.

Can I import from Silver Financial Planner?

Yes, you can import client files from Silver, the Secure Online Planning Survey, and TOTAL Planning Suite.

Subscription Questions:

For more pricing information, please view the pricing sheet.

How much does it cost for new licenses?

New subscriptions of the online edition are the same price as the desktop edition. New subscriptions for Easy Money and Golden Years are $895 separately, and $1,324 for Easy Money and Golden Years combined.

How much will it cost to switch from the desktop edition?

Desktop licenses can be switched to the online edition anytime by subscribing at the renewal price for TOTAL Online, receiving credit for any unused time on our desktop subscription.

How much is the renewal?

The renewal is $649 for Easy Money or Golden Years separately, and $999 for Easy Money and Golden Years combined.

Why is the renewal more than the desktop edition?

Both the desktop and online editions offer a discounted renewal cost. Renewals cover ongoing technical support services and software development. The desktop editions renewal offers a deeper discount because the customer is responsible for maintaining the software, hardware and data, where those services are provided by Money Tree for the online edition.

If you have questions not covered in this FAQ:
Please contact our support or sales team for answers.

Support:

Toll Free 877-421-9815 ext. 0 or email support@moneytree.com
Weekdays, 6:30 am – 5:00 pm

Sales:

Toll Free 877-421-9815 ext. 4 or email sales@moneytree.com
Weekdays, 8:00 am – 5:00 pm