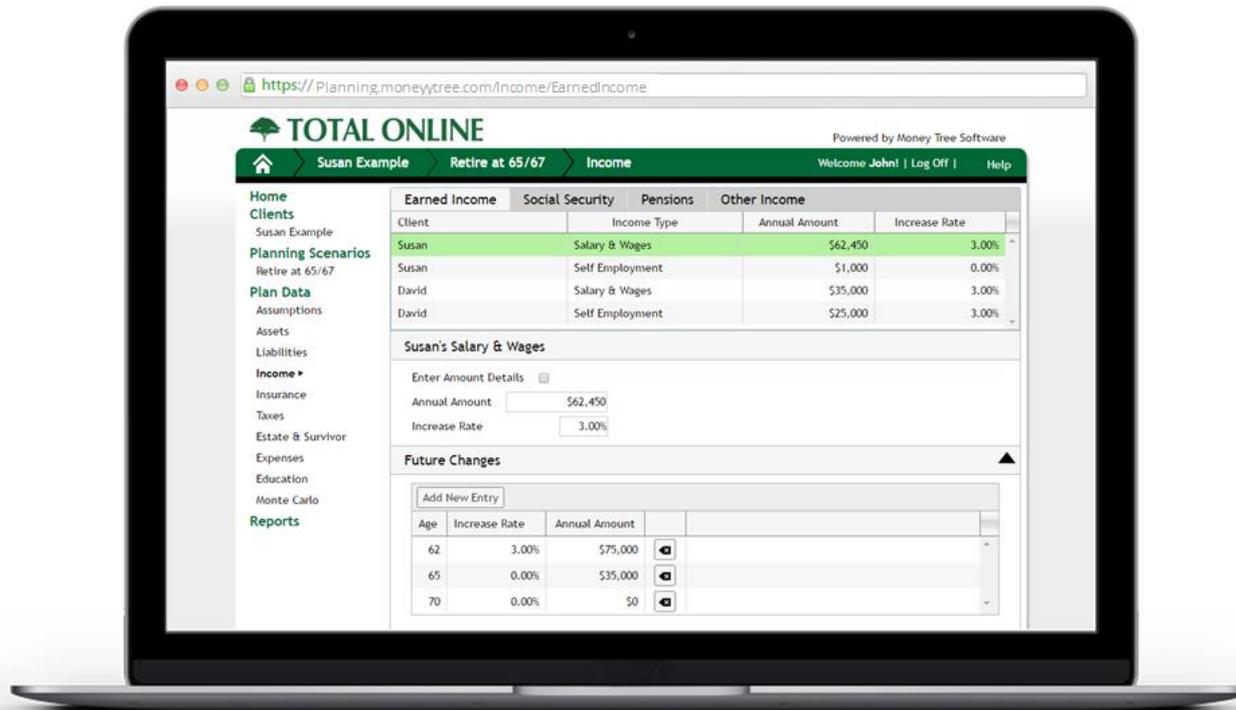


TOTAL

User Guide



Administration

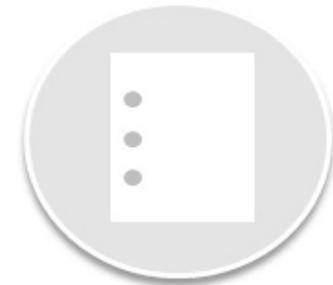
Administration



Welcome John

This section allows the account administrators to set permissions and roles for company planners, change the style to include the company logo and colors, and import data from the desktop edition.

Once you logged into TOTAL Online, select [Administration] from the left hand menu.



Users



User Administration

-  Add User
-  Edit User
-  Delete User

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

The [User] section is used to add and delete users. This is also where user titles, passwords and roles can be edited.

Add User

TOTAL ONLINE Powered by Money Tree Software

Administration

Home
Clients
Settings
Help
Administration ▶

Users
User Administration

+ Add
✎ Edit
✕ Delete

Add User

Email Address:

Password:

Confirm Password:

First Name:

Last Name:

License Available: All Licenses in Use (0) ▼

Title:

Assigned Role: Advisor ▼

Administrator: Allows user to edit settings found in the administration section (users and roles)

OK Cancel

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To add a new user, enter the users information to create a user profile and login.

Available licenses will display to assign to the new user.

Assign the user a role, which sets permissions (see Roles).

Select Administrator to give the user unlimited permission and access to the Administration section.

Edit User

TOTAL ONLINE Administration

Powered by Money Tree Software

Welcome John! | Log Off | Help

Home
Clients
Settings
Help
Administration >

Users
User Administration

+ Add
✎ Edit
✕ Delete

Edit User

Email Address: johnsmith@exampleco.com

Password:

Confirm Password:

First Name: John

Last Name: Smith

License: TOTAL Online Demo - Expires (1/4/2025)

Title: Financial Advisor

Assigned Role: Advisor

Administrator: Allows user to edit settings found in the administration section (users and roles).

Disable User:

OK Cancel

Database

Edit allows changes to an existing user, including assigning a new password or disabling the user account.

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Roles



- Home
- Clients
- Settings
- Help
- Administration ▶

- Users
- Roles
- Password Policy
- Style Settings
- Import Database

Role Administration

-  Add Role
-  Edit Role
-  Delete Role

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.

Assistant Assistant role
[Roles] define permissions that can be assigned to each user. Three roles of Advisor, Paraplanner and Assistant pre-set by Money Tree Software.

Add Role

The screenshot shows the 'Add Role' dialog box overlaid on the TOTAL ONLINE software interface. The background interface includes a navigation menu with 'Home', 'Clients', 'Settings', 'Help', and 'Administration'. The dialog box has a title bar with 'Add Role' and a close button. It contains the following elements:

- Name:** A text input field.
- Description:** A text input field.
- Permissions:** A list of checkboxes with descriptions:
 - View/edit all contacts
Allows user to interact with all contacts that belong to the office.
If unchecked, users can only see contacts that are assigned to them.
 - Import Contacts
Allow user to import contacts into TOTAL Online.
 - Export Contacts
Allow user to export contacts from TOTAL Online.
 - Delete Contacts
Allow user to permanently delete contacts from TOTAL Online.
 - Customize Settings
Allows User to Edit default settings and assumptions for everyone using TOTAL Online in your office.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom right.

A green callout box on the right side of the dialog box contains the following text:

To add a new role, provide a name and description for the role and check the permissions available for users assigned to this role.

Edit Role

The screenshot displays the 'Edit Role' dialog box within the TOTAL ONLINE administration interface. The dialog has a title bar with a close button (X) and contains the following fields and options:

- Name:** A text input field containing the value 'Advisor'.
- Description:** A text input field containing the value 'Advisor as defined by Money Tree Software.'
- Permissions:** A list of five permissions, each with a checked checkbox and a description:
 - View/edit all contacts**
Allows user to interact with all contacts that belong to any advisor. If unchecked, users can only see contacts that are assigned to them.
 - Import Contacts**
Allow user to import contacts into TOTAL Online.
 - Export Contacts**
Allow user to export contacts from TOTAL Online.
 - Delete Contacts**
Allow user to permanently delete contacts from TOTAL Online.
 - Customize Settings**
Allows User to Edit default settings and assumptions for TOTAL Online in your office.

A callout box on the right side of the dialog provides additional information: 'Edit Role allows the administrator to change permissions for an existing role. The default roles provided by Money Tree Software cannot be edited.'

Password Policy



- Home
- Clients
- Settings
- Help
- Administration ▶

- Users
- Roles
- Password Policy
- Style Settings
- Import Database

Password Policy

Session Timeout (minutes)

Session timeouts help protect data when you leave your computer unattended by logging you out of the system so information cannot be viewed without the proper login credentials.

The default session timeout is 20 minutes. The maximum duration allowed is 90 minutes.

Style Settings



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Administration

Welcome **John!** | Log Off |

Help

Home
Clients
Settings
Help
Administration ▶

Users Roles Password Policy **Style Settings** Import Database

Customize Website

Browse...



TOTAL ONLINE

Color Scheme:

Money Tree Green ▼

[Style Settings] allows the administrator to customize the look of the Total Online interface by selecting a logo and picking an color scheme.

Style Settings



Customize Website

Browse...



Color Scheme:

[Browse] to select a new logo for the top left of the website. Applicable image types are .png, .jpg, and .gif. If too large, images will be resized to 50 pixels vertical and keep the same aspect ratio.

Select an option available under **[Color Scheme]**, this will change the color of the menu bars and header fonts within Total Online.

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Import Database

- Home
- Clients
- Settings
- Help
- Administration ▶

Users Roles Password Policy Style Settings **Import Database**

Import a TPS Desktop Database

Select Database File

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

This sections allows advisors to import databases from Total Planning Suite 5. Importing a database will bring the program settings and all of the client scenarios from the desktop version to the online version.

Administration

Thank you for taking the time to review TOTAL Online's Administration guide.

Questions?

Ask Money Tree's Support Team

Toll free 1.877.421.9815
support@moneytree.com