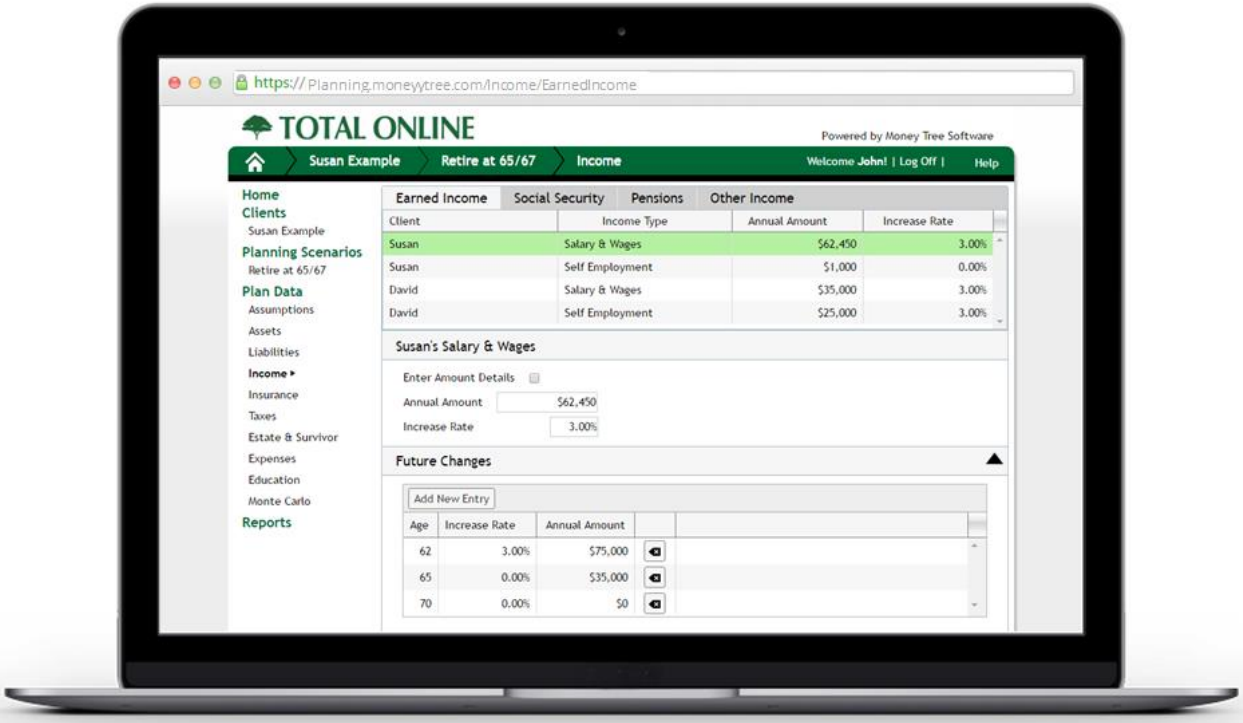
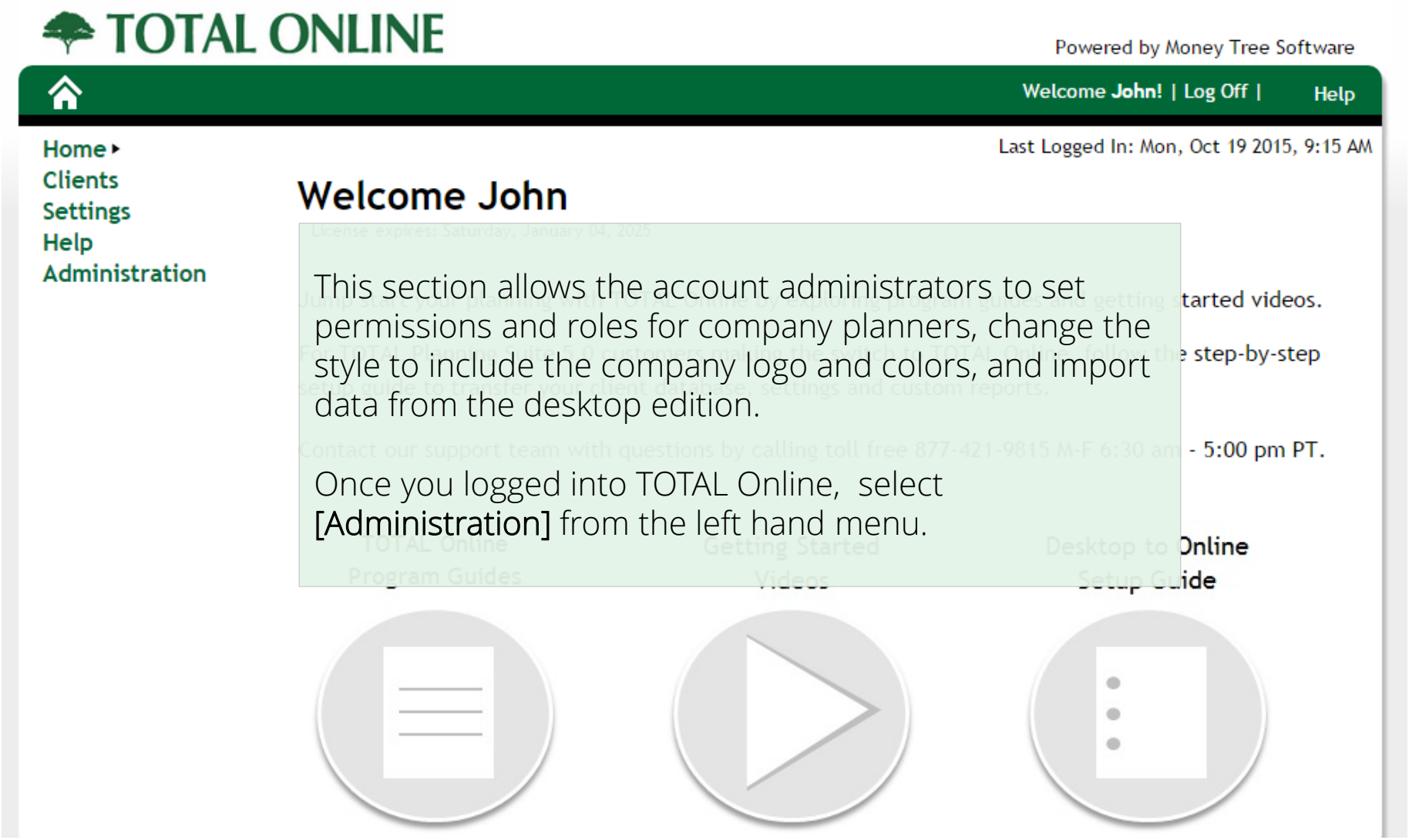
TOTAL User Guide



Administration

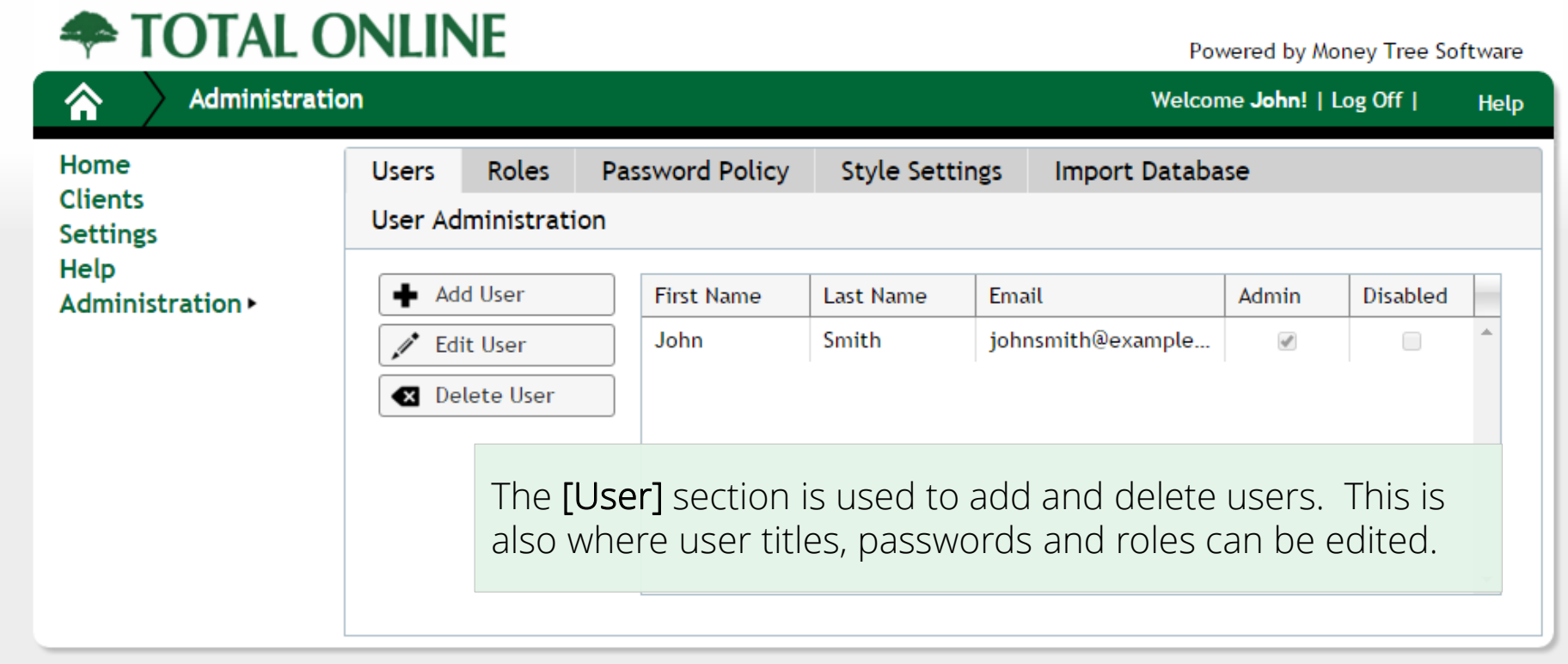
Administration



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.

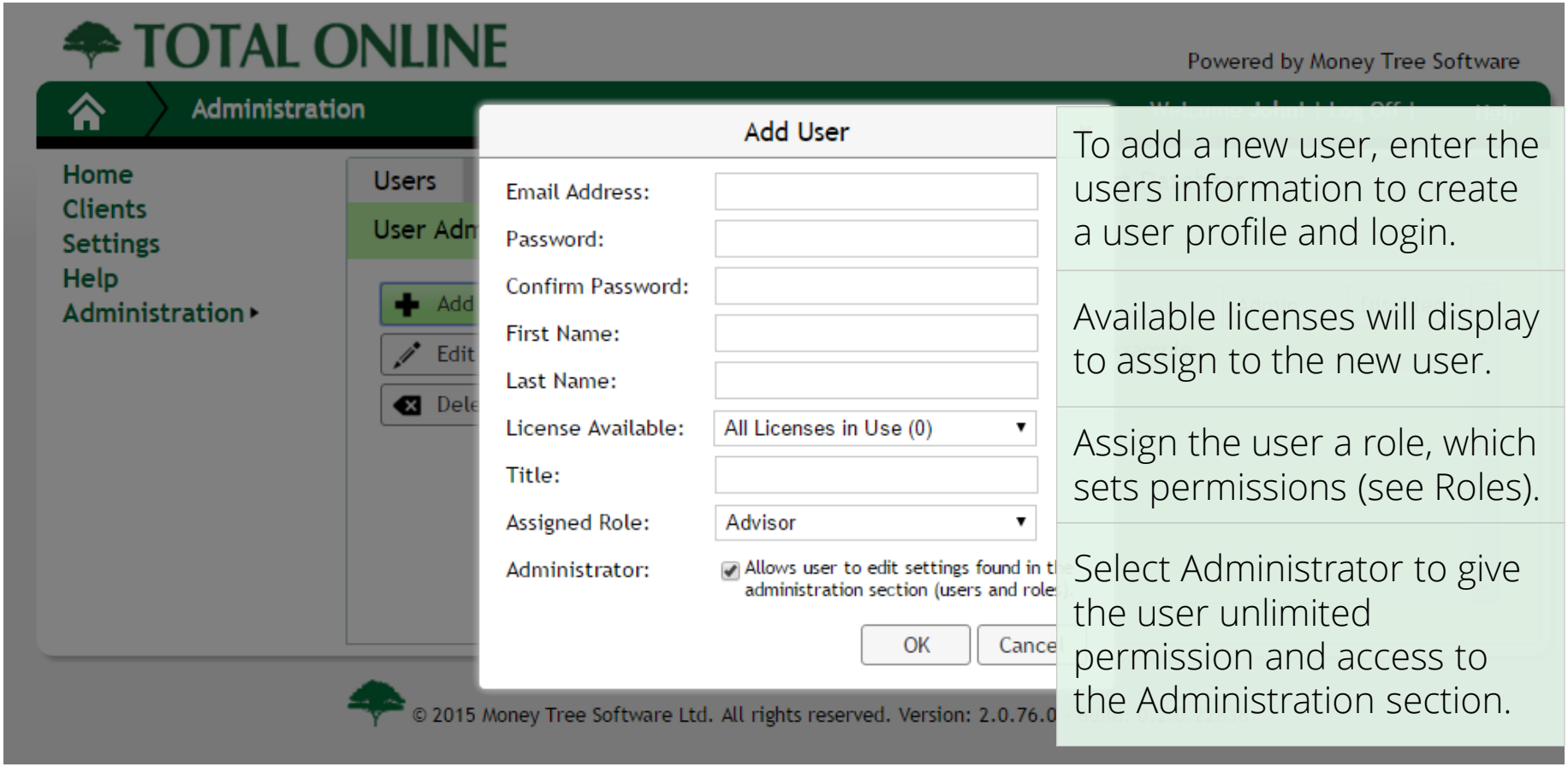
Once you logged into TOTAL Online, select [Administration] from the left hand menu.

Users



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

Add User



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

Powered by Money Tree Software

Administration

Welcome John! | Log Off | Help

Home
Clients
Settings
Help
Administration

Users

User Adm

Add

Edit

Dele

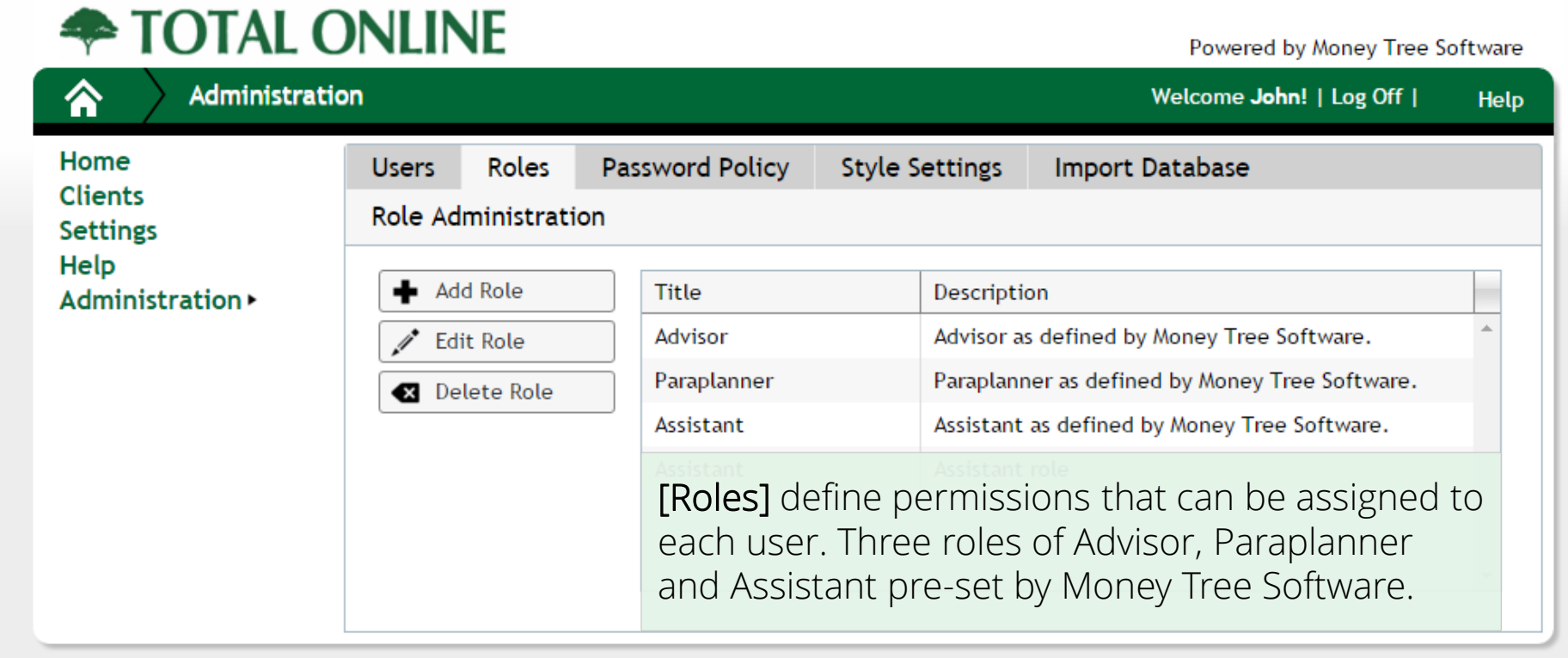
Edit User

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:	☐

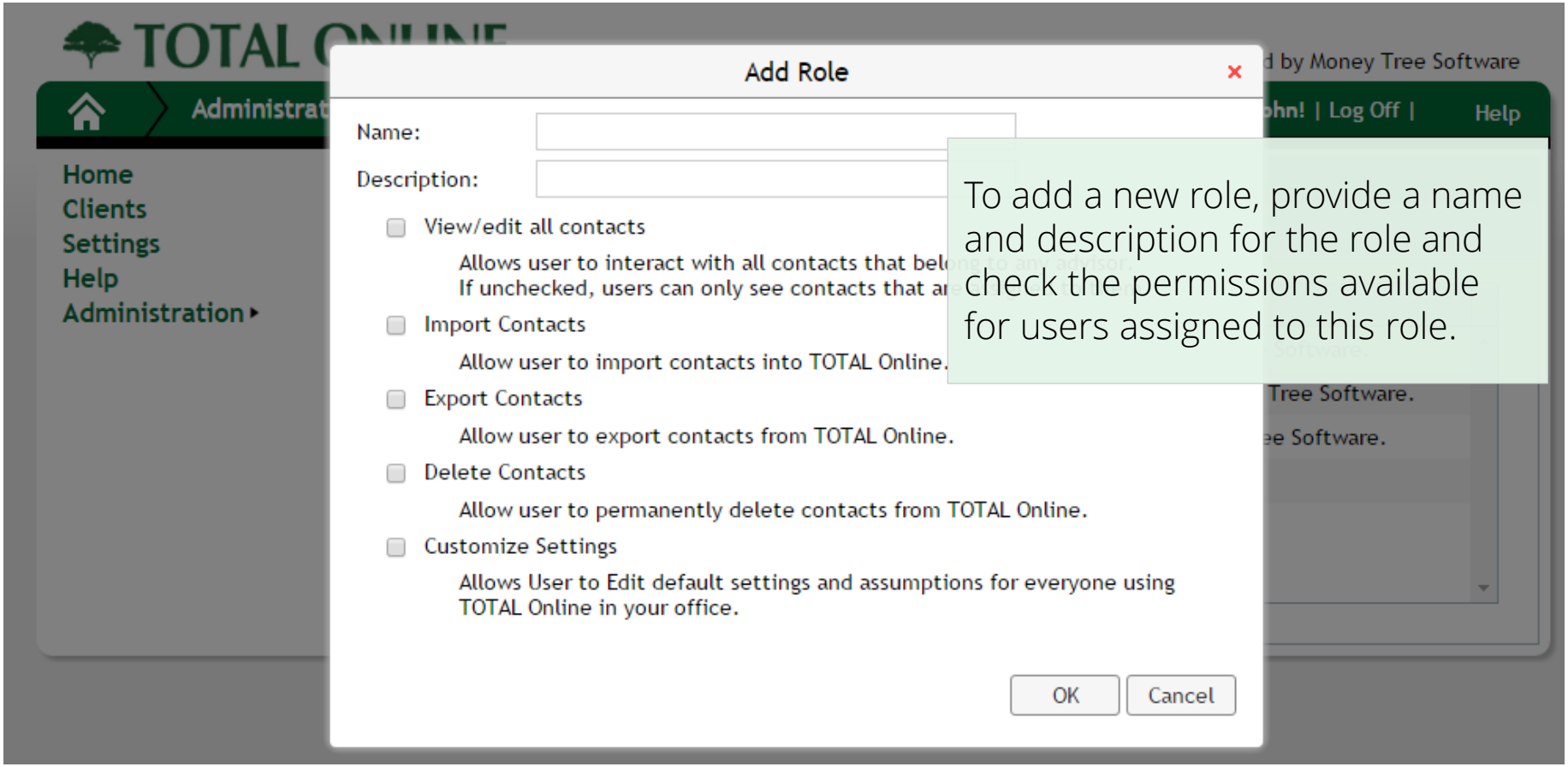
OK Cancel

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

Roles

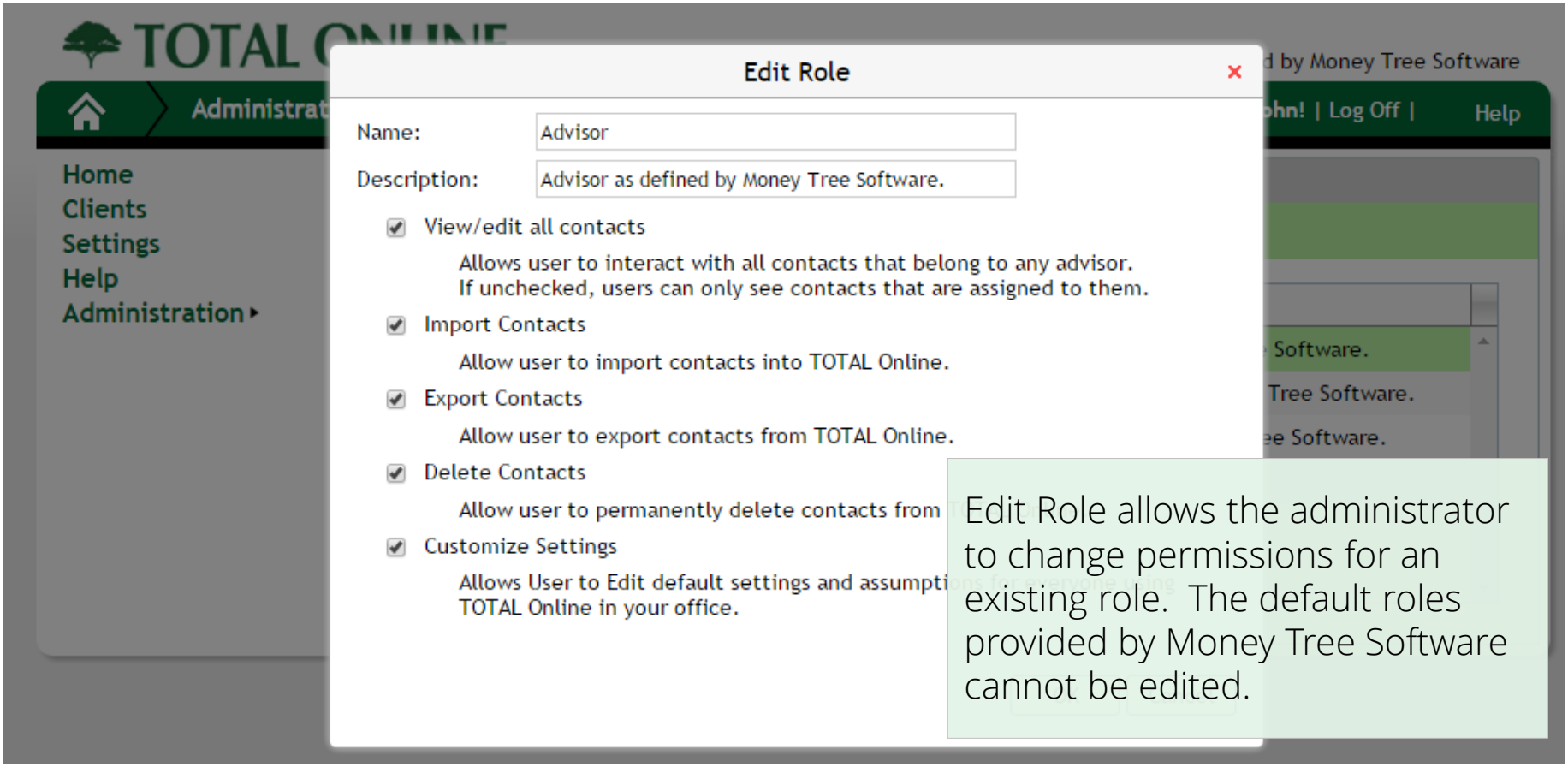

TOTAL ONLINE
Powered by Money Tree Software
Administration
Welcome John! | Log Off |
Help
Home
Clients
Settings
Help
Administration
Users
Roles
Password Policy
Style Settings
Import Database
Role Administration
Add Role
Edit Role
Delete Role
Title
Description
Advisor
Advisor as defined by Money Tree Software.
Paraplanner
Paraplanner as defined by Money Tree Software.
Assistant
Assistant as defined by Money Tree Software.
[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



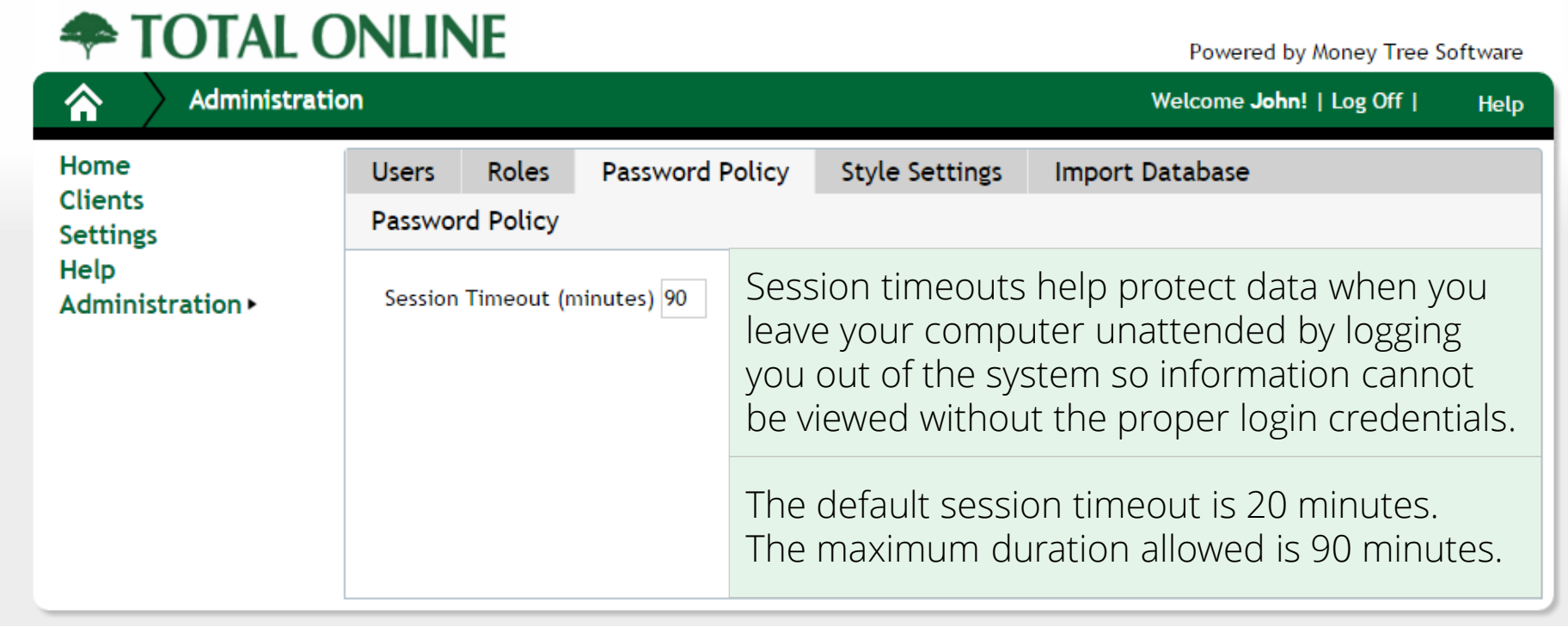
To add a new role, provide a name and description for the role and check the permissions available for users assigned to this role.

Edit Role

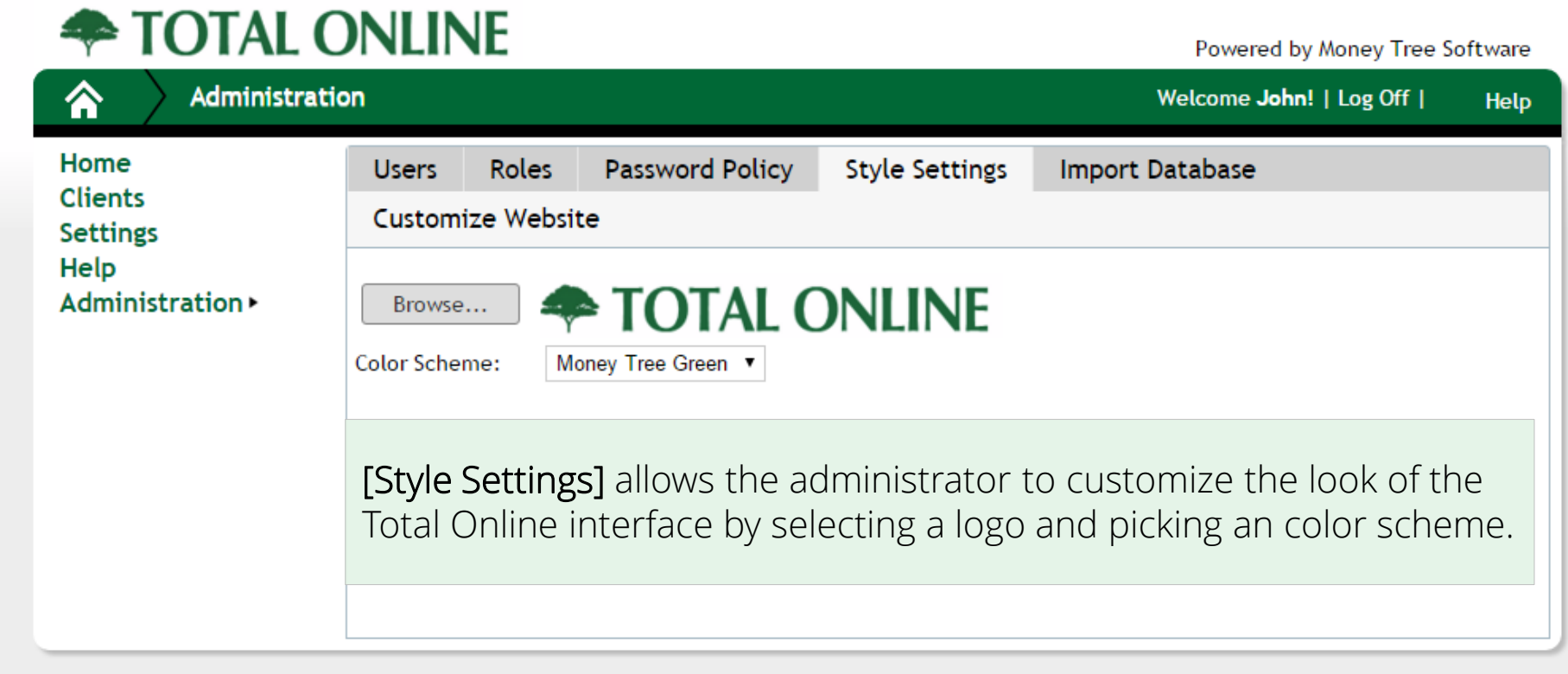


Edit Role allows the administrator to change permissions for an existing role. The default roles provided by Money Tree Software cannot be edited.

Password Policy

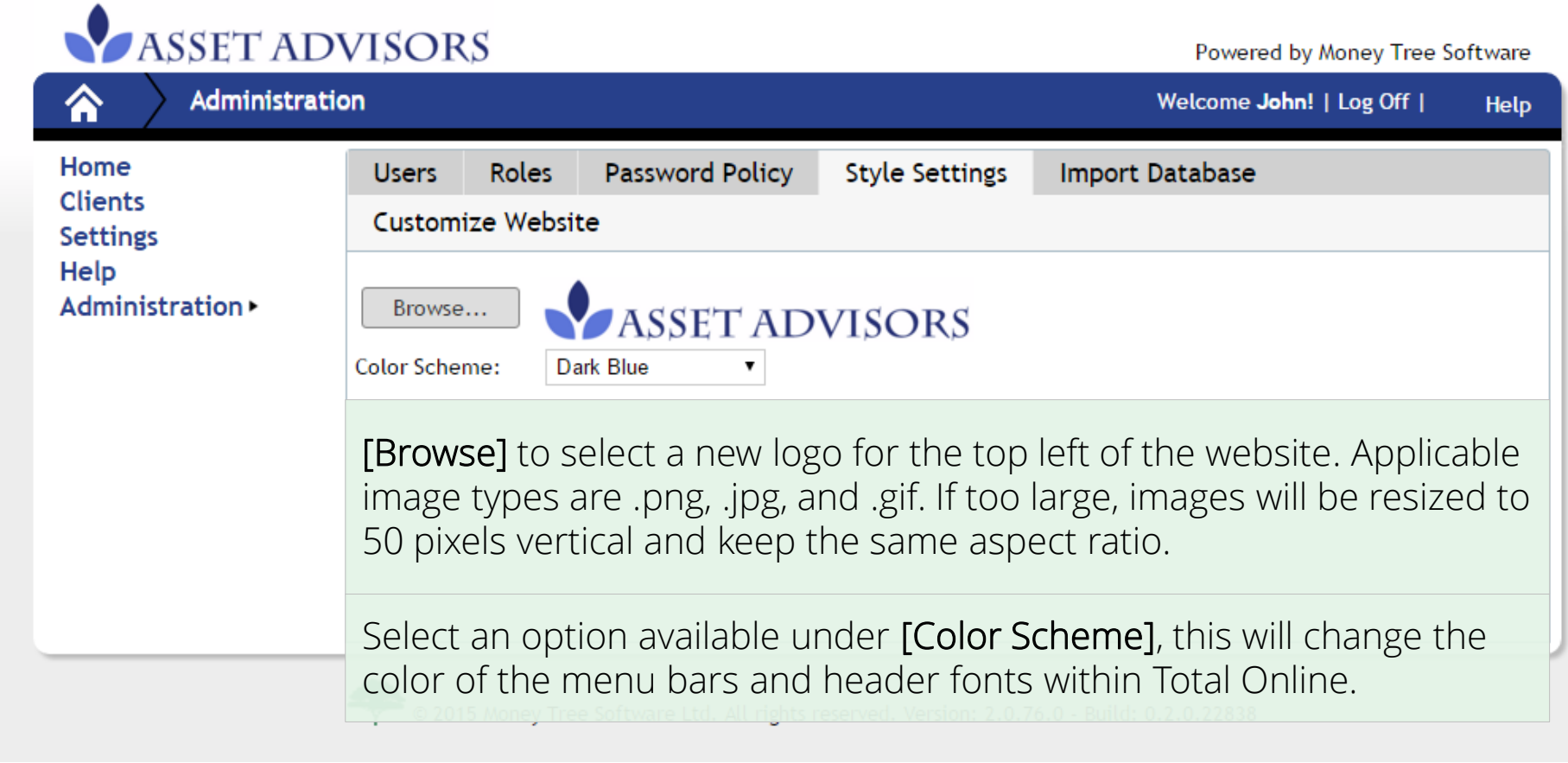


Style Settings



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

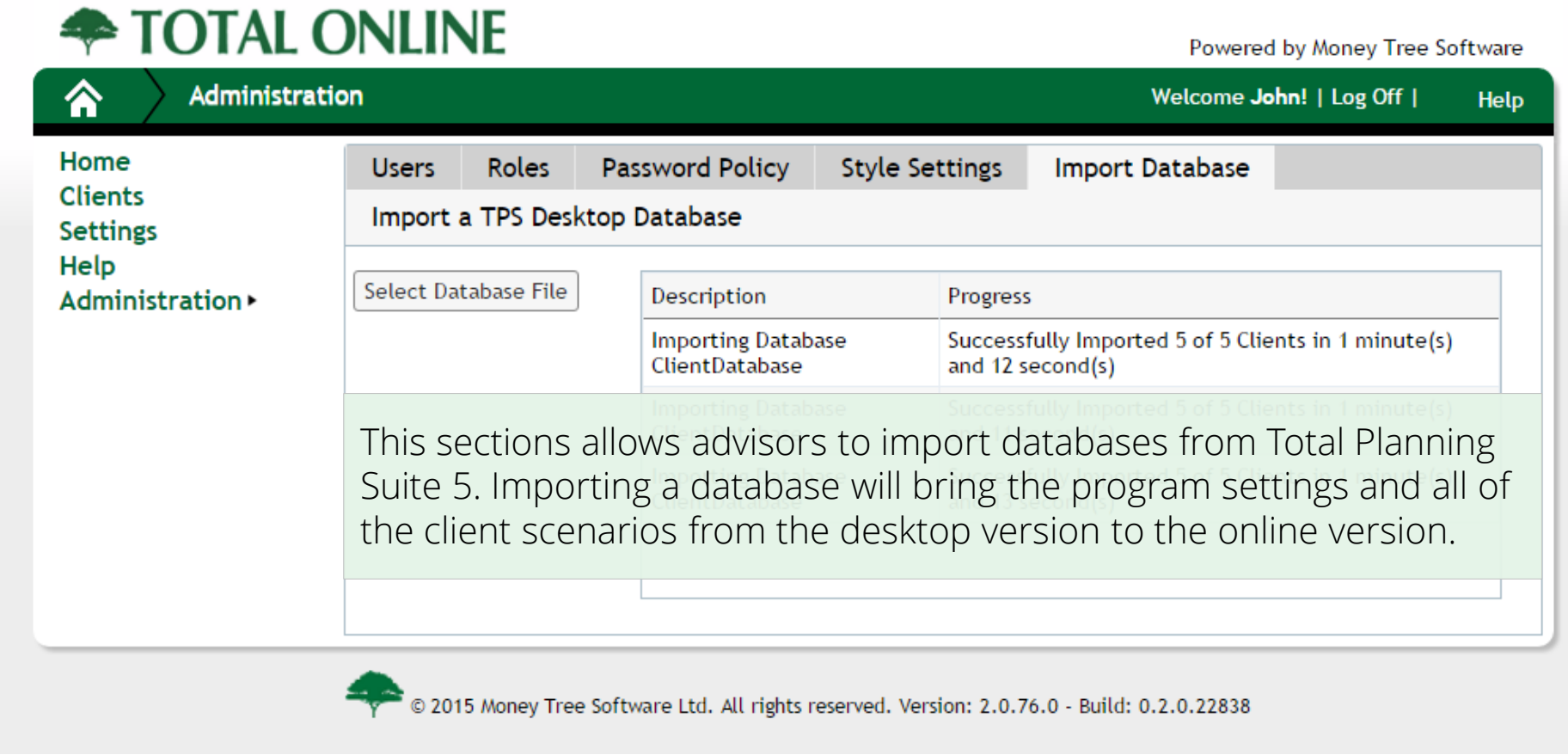
Style Settings



[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.

Import Database



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