User Guide

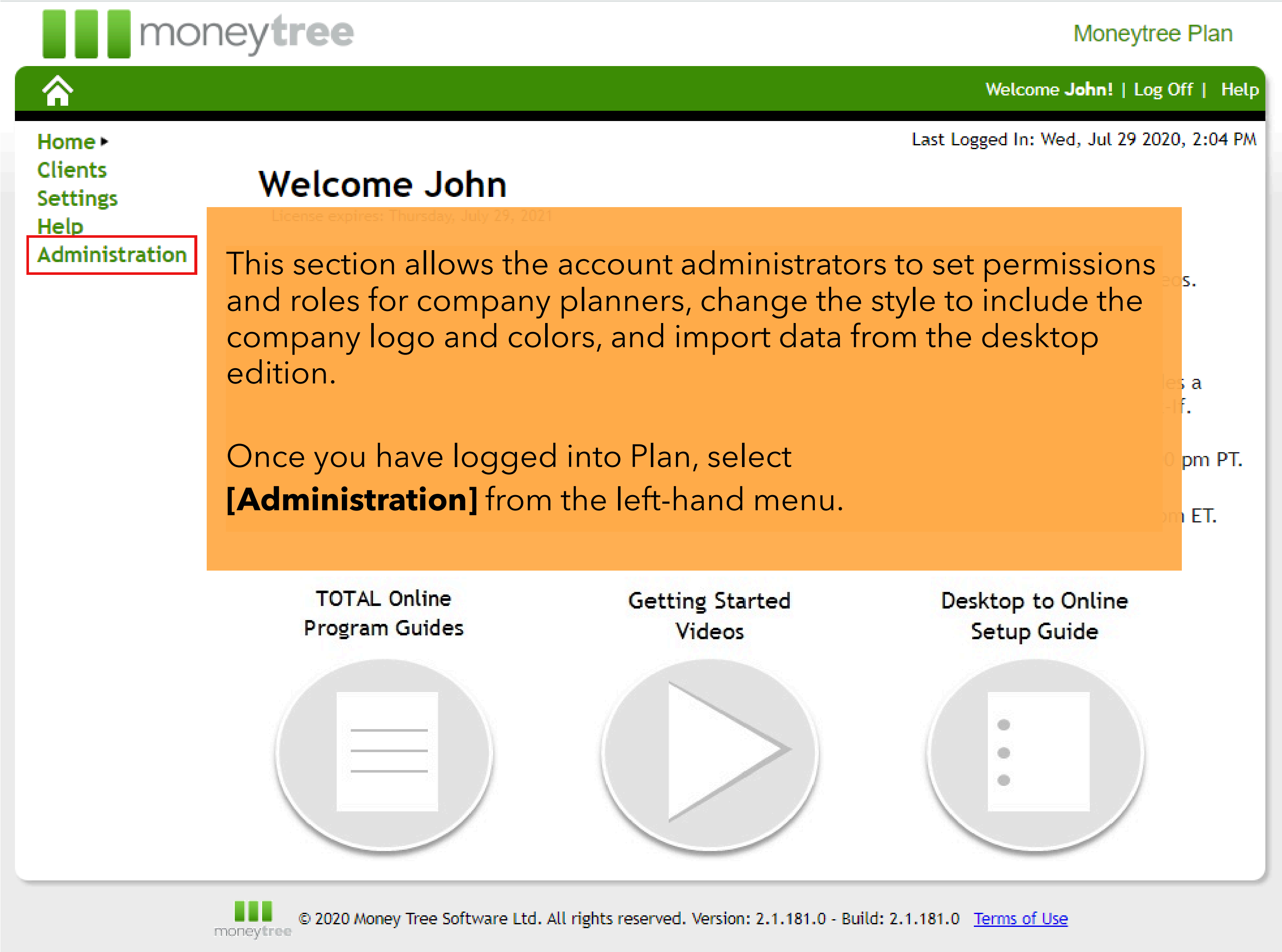
Administration

Moneytree Plan

moneytree.com 1-877-421-9815

moneytree
plan to prosper

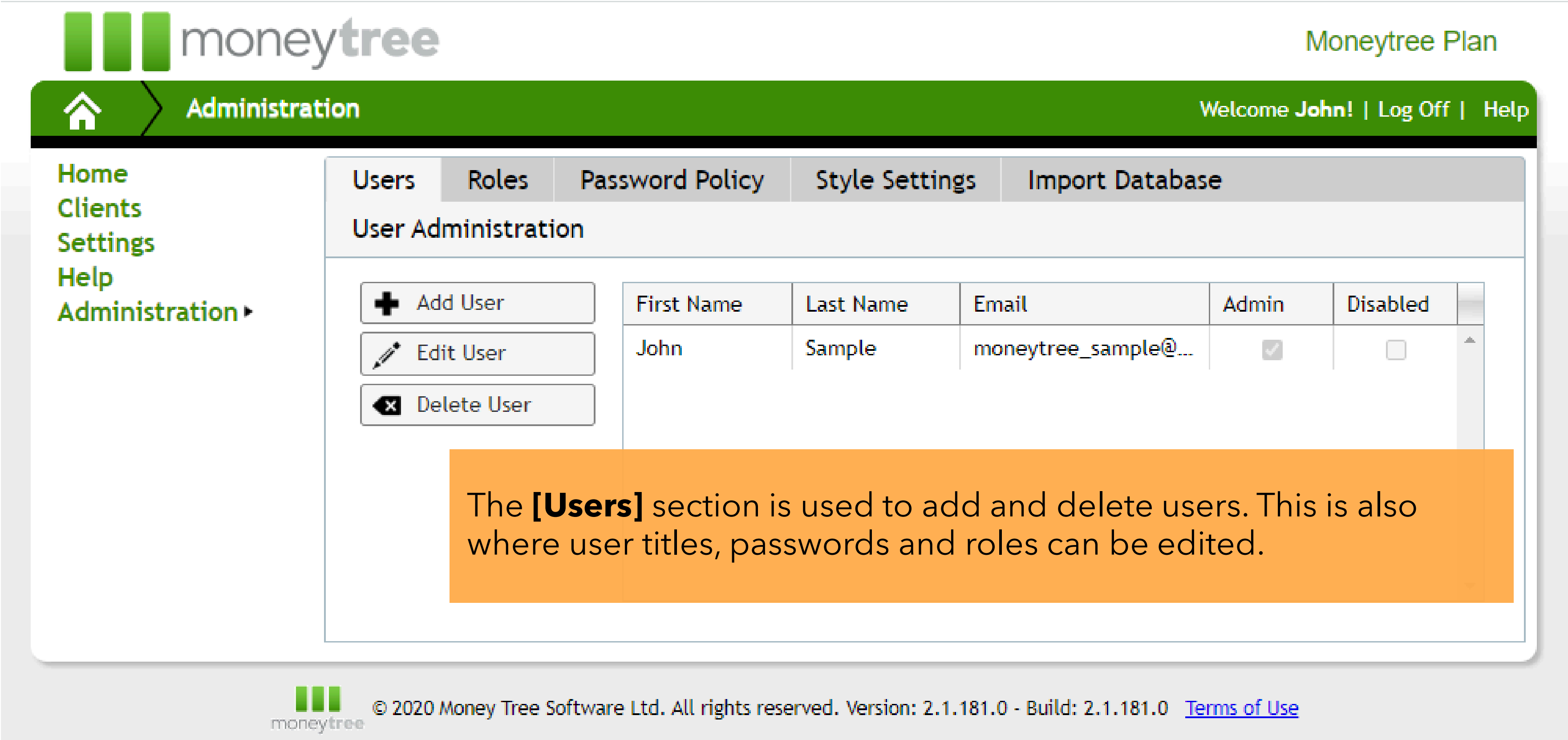
Administration



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.

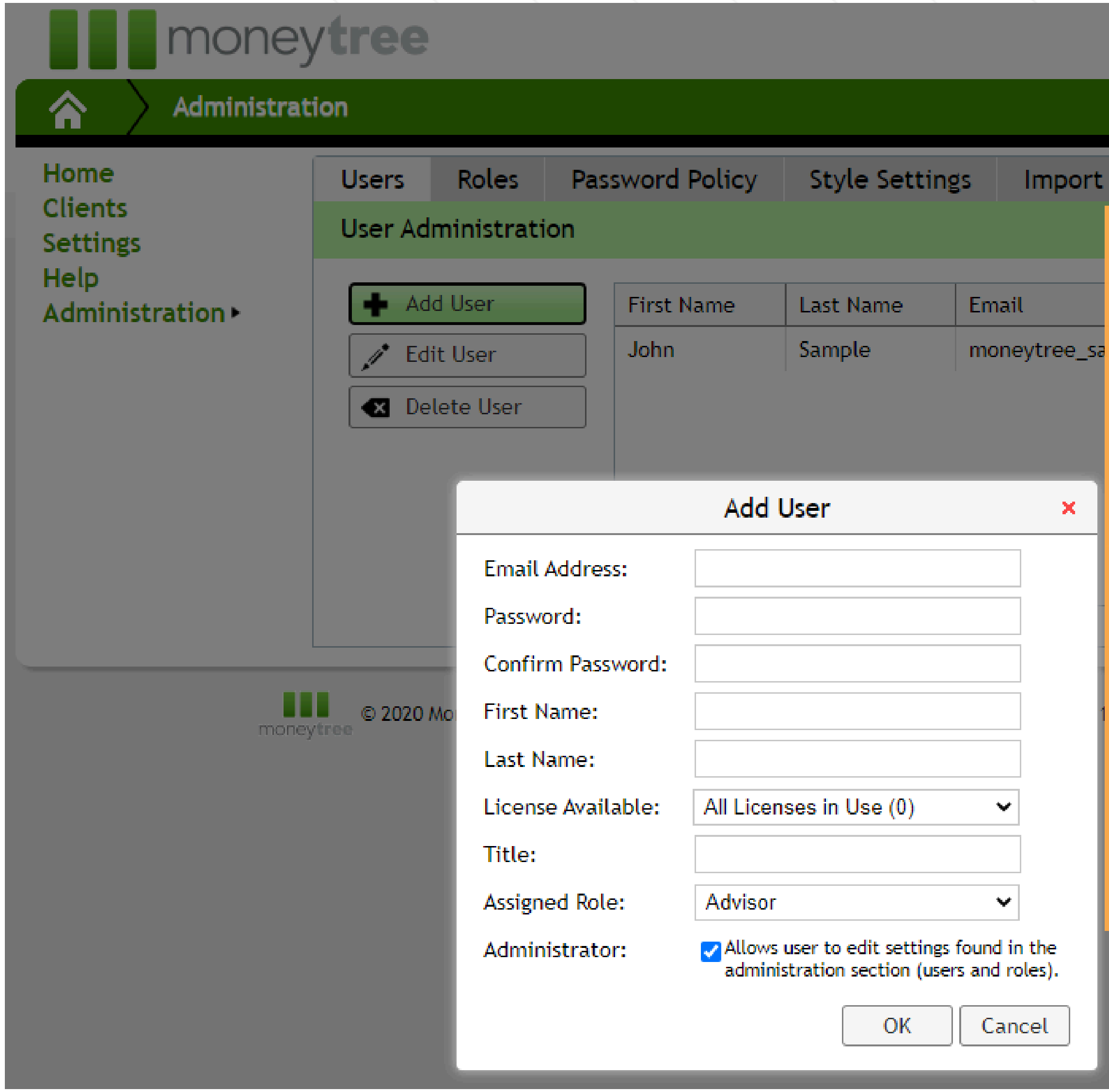
Once you have logged into Plan, select **[Administration]** from the left-hand menu.

Users



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

Add User



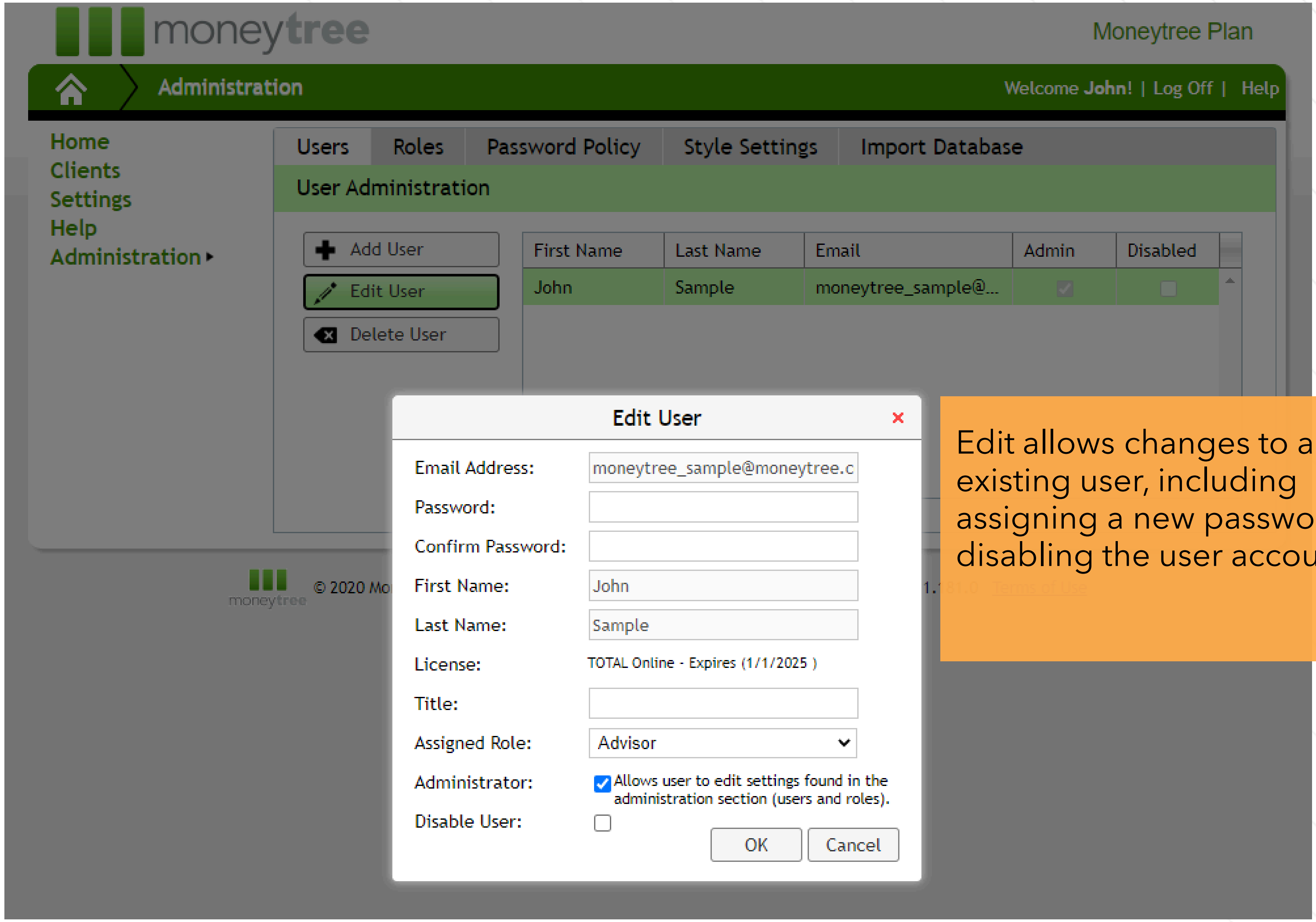
To add a new user, enter the user's information to create a user profile and login.

Available licenses will display to assign to the new user.

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

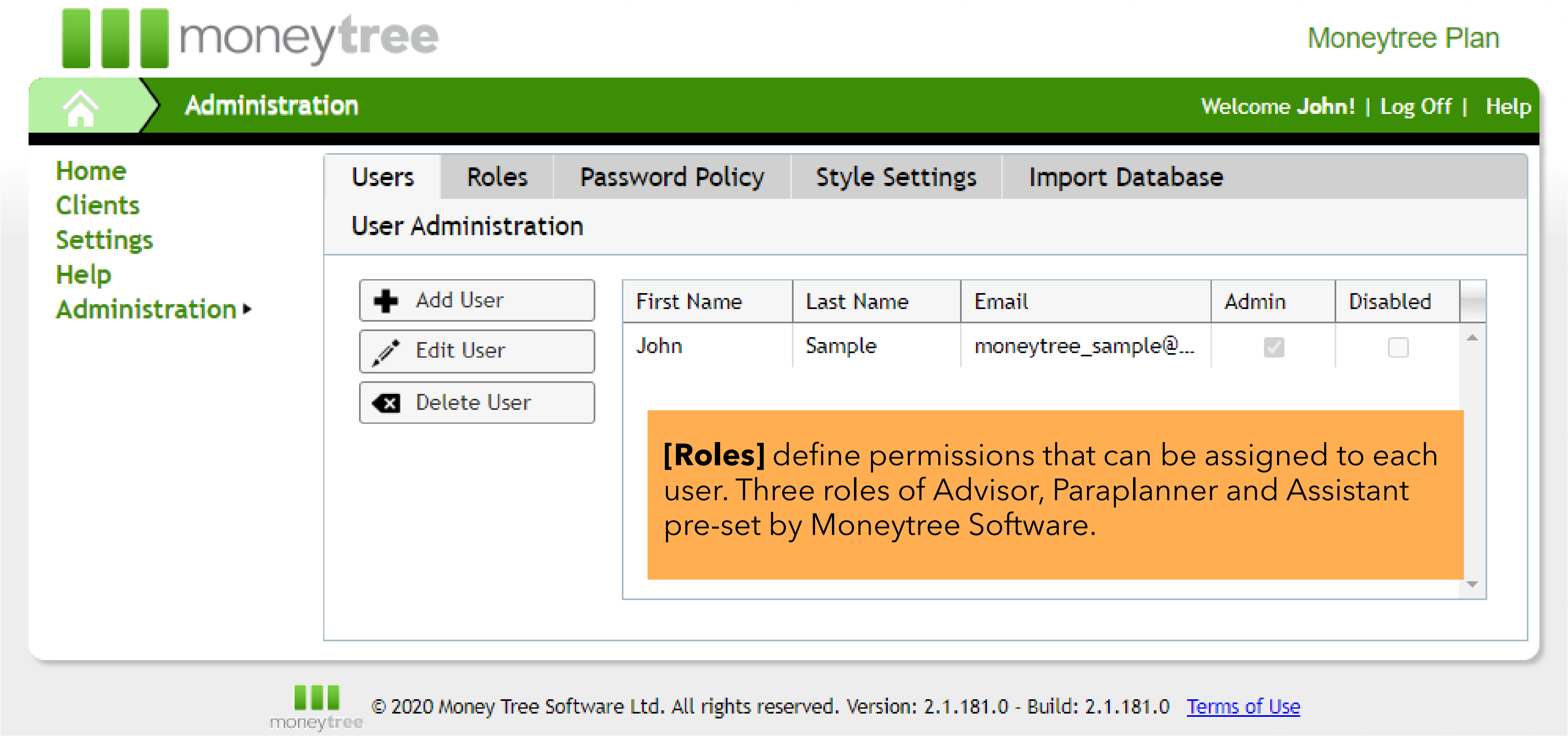
Select Administrator to give the user unlimited permission and access to the Administration section.

Edit User



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

Roles


moneytree
Moneytree Plan
Administration
Welcome John! | Log Off | Help
Home
Clients
Settings
Help
Administration
Users
Roles
Password Policy
Style Settings
Import Database
User Administration
Add User
Edit User
Delete User
First Name
Last Name
Email
Admin
Disabled
John
Sample
moneytree_sample@...
[Roles] define permissions that can be assigned to each user. Three roles of Advisor, Paraplanner and Assistant pre-set by Moneytree Software.
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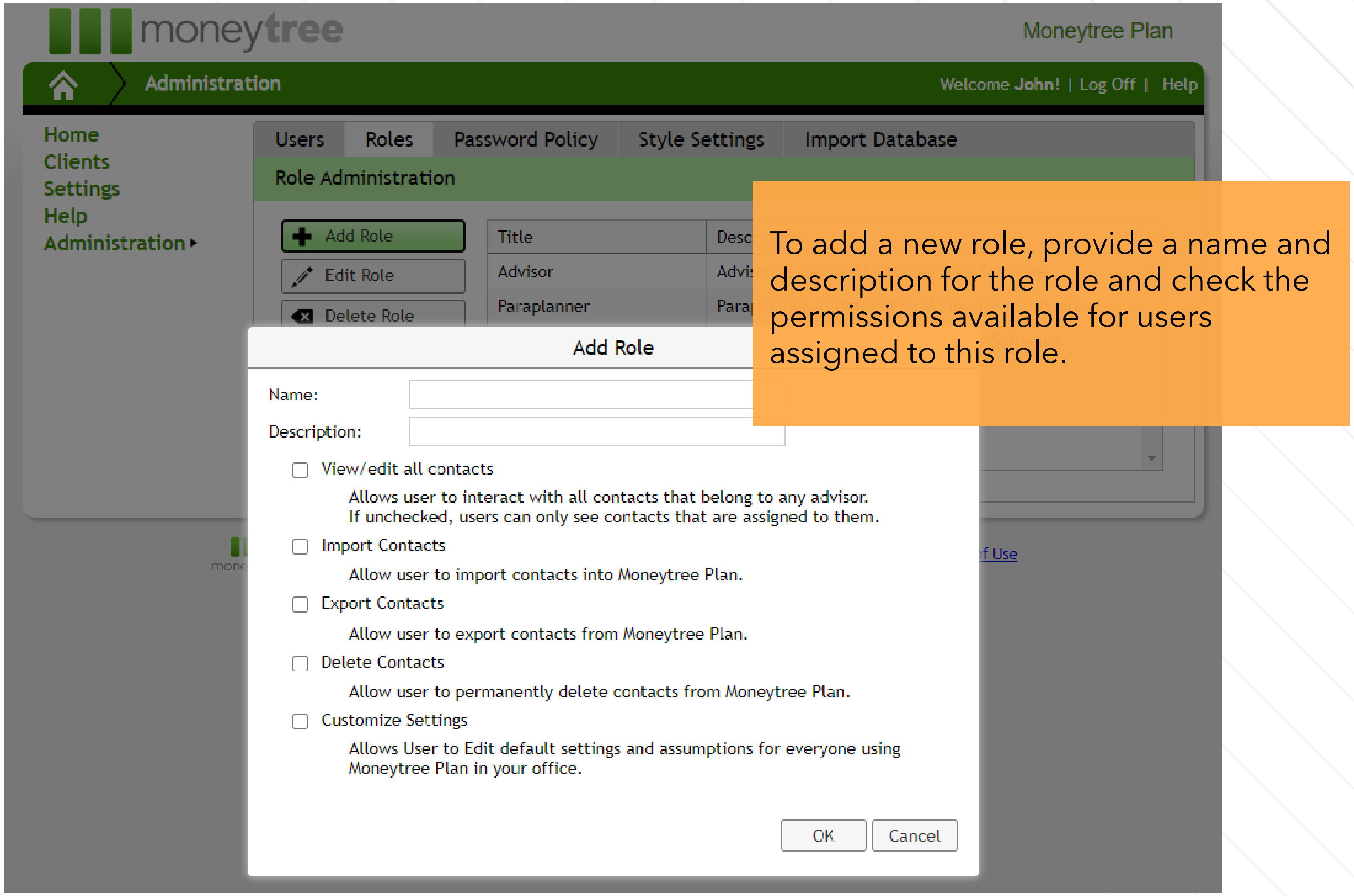
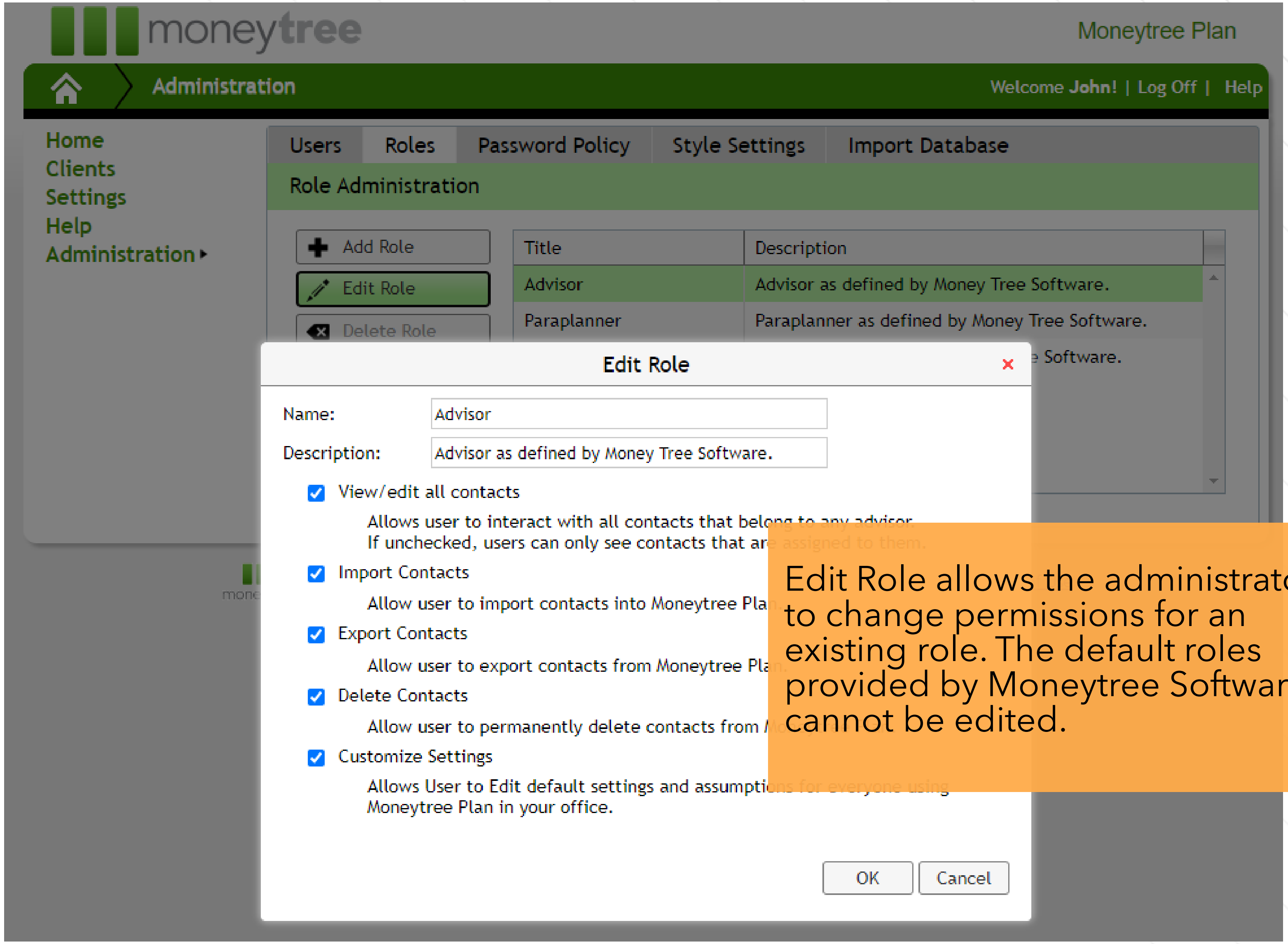
Add Role



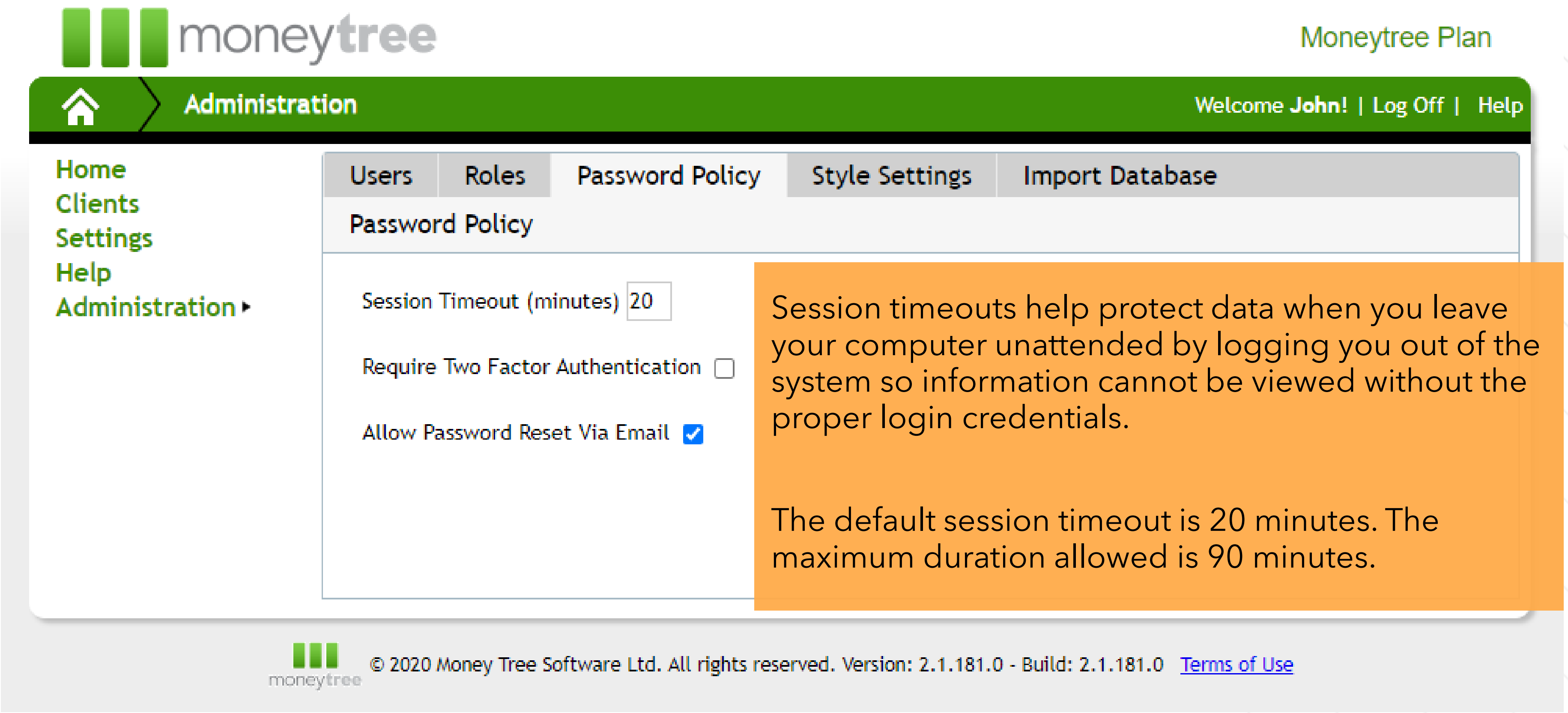
moneytree
Moneytree Plan
Administration
Welcome John! | Log Off | Help
Home
Clients
Settings
Help
Administration
Users
Roles
Password Policy
Style Settings
Import Database
Role Administration
Add Role
Edit Role
Delete Role
Title
Advisor
Paraplanner
Add Role
Name:
Description:
View/edit all contacts
Allows 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 Moneytree Plan.
Export Contacts
Allow user to export contacts from Moneytree Plan.
Delete Contacts
Allow user to permanently delete contacts from Moneytree Plan.
Customize Settings
Allows User to Edit default settings and assumptions for everyone using
Moneytree Plan in your office.
OK
Cancel
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 Moneytree Software cannot be edited.

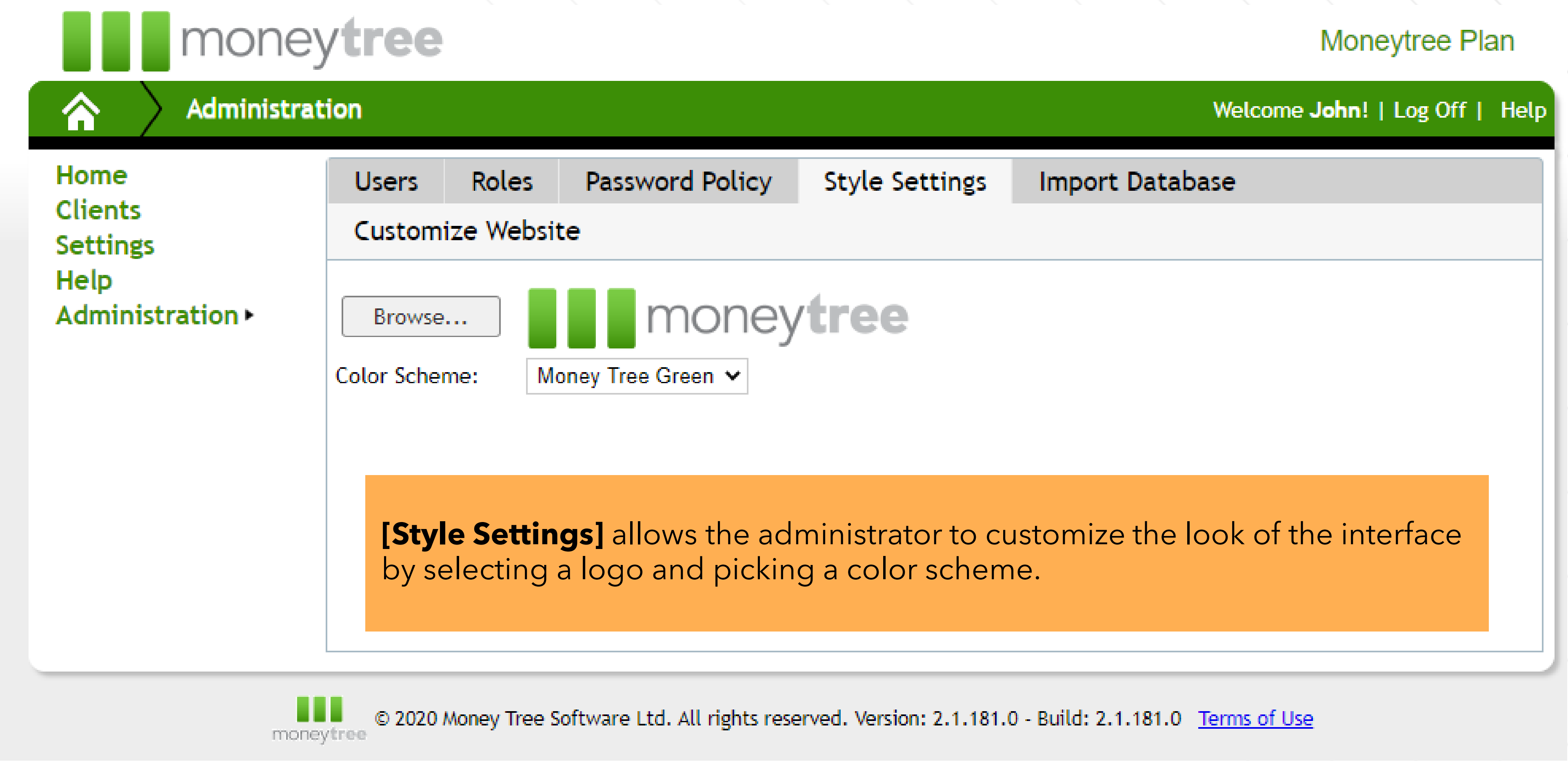
Password Policy



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.

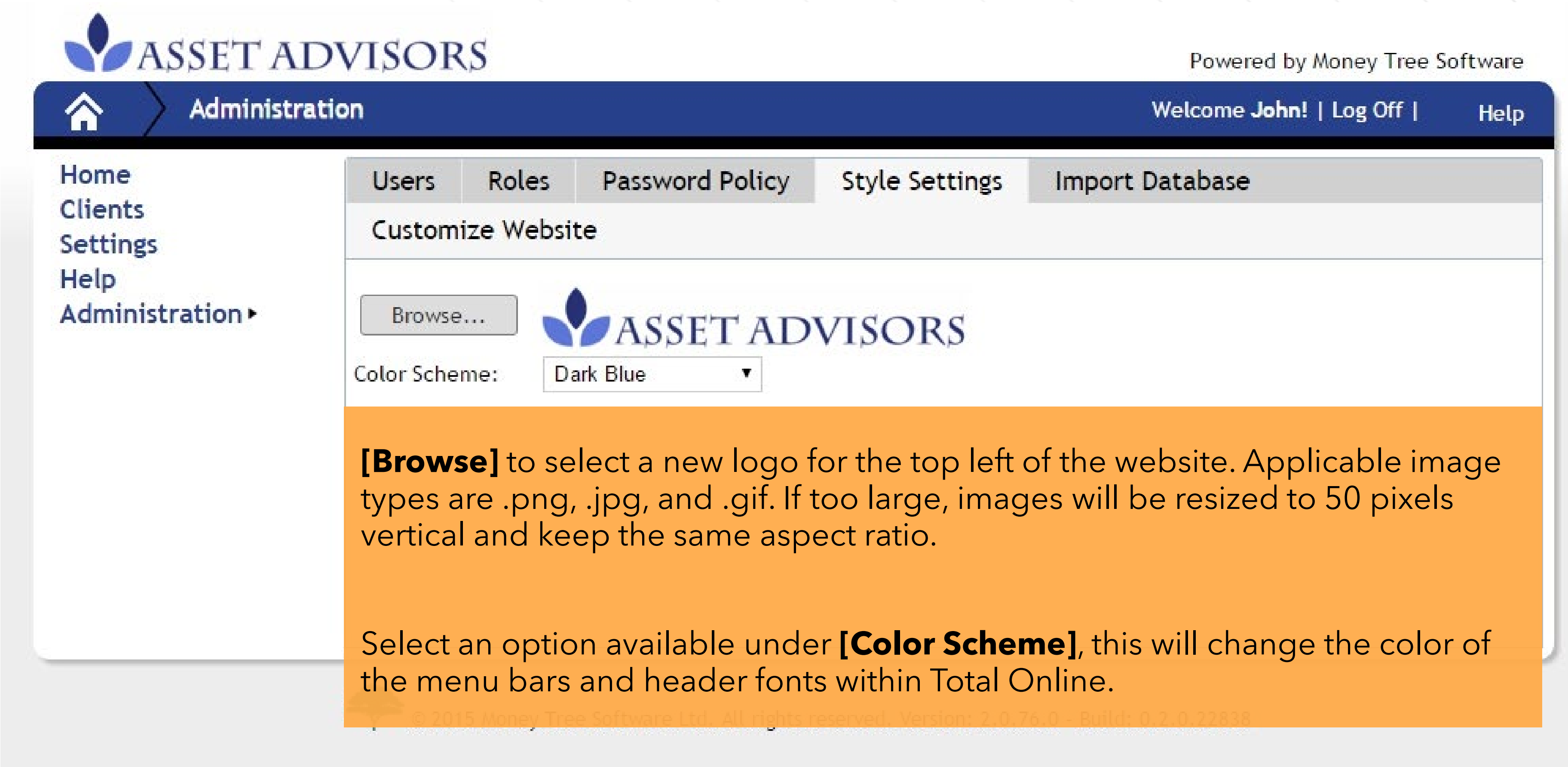
The default session timeout is 20 minutes. The maximum duration allowed is 90 minutes.

Style Settings



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

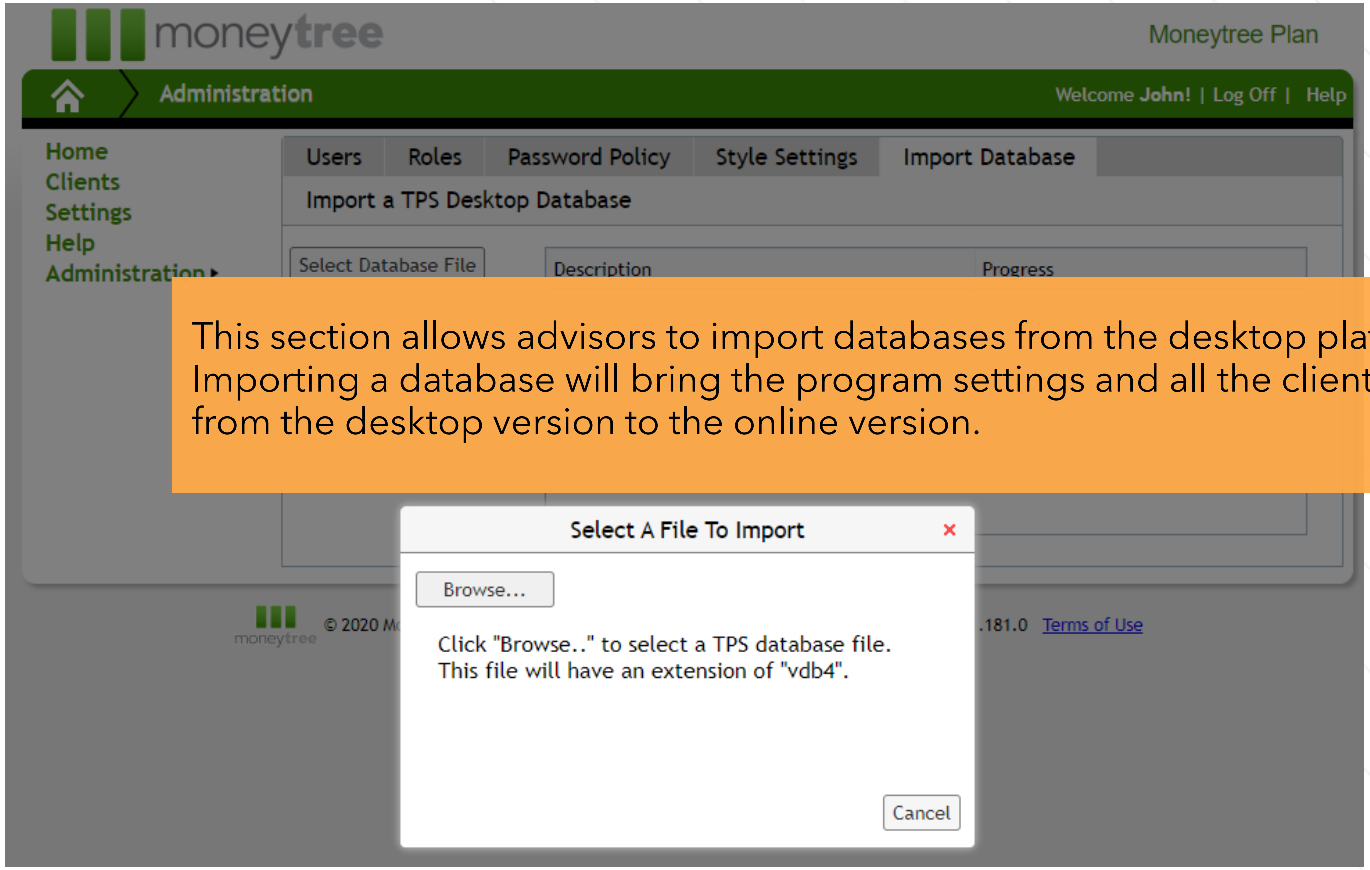
Style Settings



[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 section allows advisors to import databases from the desktop platform. Importing a database will bring the program settings and all the client scenarios from the desktop version to the online version.

Need assistance? Contact our client support team.

moneytree.com/support-center

877-421-9815

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