

User Guide



Administration

Moneytree Plan

moneytree.com

1-877-421-9815



Administration

moneytree Moneytree Plan

Welcome John! | Log Off | Help

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Clients
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Help
Administration

Last Logged In: Wed, Jul 29 2020, 2:04 PM

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

TOTAL Online Program Guides

Getting Started Videos

Desktop to Online Setup Guide

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Users

The screenshot displays the Moneytree Plan Administration interface. At the top left is the Moneytree logo, and at the top right is the text "Moneytree Plan". Below this is a green navigation bar with a home icon and the word "Administration". On the right side of this bar, it says "Welcome John! | Log Off | Help".

On the left side of the main content area, there is a vertical menu with the following items: Home, Clients, Settings, Help, and Administration (which is highlighted with a right-pointing arrow).

The main content area has a sub-navigation bar with tabs for "Users", "Roles", "Password Policy", "Style Settings", and "Import Database". The "Users" tab is selected.

Below the tabs, the section is titled "User Administration". On the left side of this section, there are three buttons: "Add User" (with a plus icon), "Edit User" (with a pencil icon), and "Delete User" (with an 'x' icon).

To the right of these buttons is a table with the following columns: "First Name", "Last Name", "Email", "Admin", and "Disabled". The table contains one row of data:

First Name	Last Name	Email	Admin	Disabled
John	Sample	moneytree_sample@...	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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



Add User

The screenshot displays the Moneytree Administration interface. The 'Add User' dialog box is open, showing the following fields and options:

- Email Address:
- Password:
- Confirm Password:
- First Name:
- Last Name:
- License Available:
- Title:
- Assigned Role:
- Administrator: Allows user to edit settings found in the administration section (users and roles).

The background interface shows the 'User Administration' section with a table containing one user:

First Name	Last Name	Email
John	Sample	moneytree_sa

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

The screenshot displays the Moneytree Administration interface. The main navigation bar includes 'Home', 'Clients', 'Settings', 'Help', and 'Administration'. The 'Administration' section is active, showing a 'User Administration' table with columns for 'First Name', 'Last Name', 'Email', 'Admin', and 'Disabled'. A user named 'John Sample' with email 'moneytree_sample@...' is listed. The 'Edit User' dialog box is open, showing the following fields and options:

- Email Address: moneytree_sample@moneytree.c
- Password: [Empty]
- Confirm Password: [Empty]
- First Name: John
- Last Name: Sample
- License: TOTAL Online - Expires (1/1/2025)
- Title: [Empty]
- Assigned Role: Advisor
- Administrator: Allows user to edit settings found in the administration section (users and roles).
- Disable User:

Buttons for 'OK' and 'Cancel' are visible at the bottom of the dialog box.

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

Roles

The screenshot displays the Moneytree Plan Administration interface. At the top left is the Moneytree logo, and at the top right is the text "Moneytree Plan". A green navigation bar contains a home icon, the word "Administration", and the text "Welcome John! | Log Off | Help". Below this, a sidebar on the left lists "Home", "Clients", "Settings", "Help", and "Administration" (with a right-pointing arrow). The main content area has a tabbed interface with "Users", "Roles", "Password Policy", "Style Settings", and "Import Database". The "Roles" tab is active, showing "User Administration". On the left of this section are three buttons: "+ Add User", "Edit User" (with a pencil icon), and "Delete User" (with a trash icon). To the right is a table with the following data:

First Name	Last Name	Email	Admin	Disabled
John	Sample	moneytree_sample@...	<input checked="" type="checkbox"/>	<input type="checkbox"/>

An orange callout box is overlaid on the table, containing the text: "[Roles] define permissions that can be assigned to each user. Three roles of Advisor, Paraplanner and Assistant pre-set by Moneytree Software."

At the bottom of the interface, the Moneytree logo is on the left, and the copyright notice "© 2020 Money Tree Software Ltd. All rights reserved. Version: 2.1.181.0 - Build: 2.1.181.0" and a link to "Terms of Use" are on the right.

Add Role

The screenshot shows the Moneytree Plan Administration interface. The top navigation bar includes the Moneytree logo, the text 'Administration', and user information 'Welcome John! | Log Off | Help'. A sidebar on the left lists 'Home', 'Clients', 'Settings', 'Help', and 'Administration'. The main content area has tabs for 'Users', 'Roles', 'Password Policy', 'Style Settings', and 'Import Database'. The 'Roles' tab is active, showing a 'Role Administration' section with buttons for '+ Add Role', 'Edit Role', and 'Delete Role'. Below these buttons is a table with columns for 'Title' and 'Description', containing rows for 'Advisor' and 'Paraplanner'. An 'Add Role' dialog box is open in the foreground, featuring input fields for 'Name' and 'Description', and a list of permissions with checkboxes. The permissions are: 'View/edit all contacts' (allows interaction with all contacts), 'Import Contacts' (allows importing contacts), 'Export Contacts' (allows exporting contacts), 'Delete Contacts' (allows deleting contacts), and 'Customize Settings' (allows editing default settings). 'OK' and 'Cancel' buttons are at the bottom of the dialog.

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Role Administration

+ Add Role Edit Role Delete Role

Title	Description
Advisor	Advisor
Paraplanner	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

The screenshot displays the Moneytree Plan Administration interface. The top navigation bar includes the Moneytree logo, the text 'Moneytree Plan', and a user greeting 'Welcome John! | Log Off | Help'. The main navigation menu on the left lists 'Home', 'Clients', 'Settings', 'Help', and 'Administration'. The 'Administration' section is active, showing sub-tabs for 'Users', 'Roles', 'Password Policy', 'Style Settings', and 'Import Database'. The 'Roles' tab is selected, displaying a 'Role Administration' section with buttons for 'Add Role', 'Edit Role', and 'Delete Role'. A table lists roles: 'Advisor' and 'Paraplanner'. The 'Advisor' role is selected, and the 'Edit Role' dialog box is open. The dialog box contains the following fields and options:

Edit 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 Moneytree Plan in your office.

Buttons: OK, Cancel

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

Password Policy

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Users Roles Password Policy Style Settings Import Database

Password Policy

Session Timeout (minutes)

Require Two Factor Authentication

Allow Password Reset Via Email

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.

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Style Settings

The screenshot displays the Moneytree Administration interface. At the top left is the Moneytree logo, and at the top right is the text "Moneytree Plan". A green navigation bar contains a home icon, the word "Administration", and the text "Welcome John! | Log Off | Help". Below this is a sidebar menu with links for Home, Clients, Settings, Help, and Administration. The main content area has a breadcrumb trail: Users > Roles > Password Policy > Style Settings > Import Database. The "Style Settings" page is titled "Customize Website" and features a "Browse..." button, the Moneytree logo, and a "Color Scheme:" dropdown menu currently set to "Money Tree Green". An orange callout box contains the text: "[Style Settings] allows the administrator to customize the look of the interface by selecting a logo and picking a color scheme." The footer includes the Moneytree logo, copyright information for Money Tree Software Ltd. (2020), version and build numbers (2.1.181.0), and a link to the Terms of Use.

Style Settings

ASSET ADVISORS

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

Customize Website

Browse... ASSET ADVISORS

Color Scheme: Dark Blue ▼

[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

The screenshot shows the Moneytree Administration interface. The top navigation bar includes the Moneytree logo, the user's name 'John!', and options for 'Log Off' and 'Help'. The main navigation menu on the left lists 'Home', 'Clients', 'Settings', 'Help', and 'Administration'. The 'Administration' section is active, with sub-tabs for 'Users', 'Roles', 'Password Policy', 'Style Settings', and 'Import Database'. The 'Import Database' tab is selected, displaying the 'Import a TPS Desktop Database' section. A modal dialog titled 'Select A File To Import' is open, featuring a 'Browse...' button and a 'Cancel' button. The dialog text reads: 'Click "Browse.." to select a TPS database file. This file will have an extension of ".vdb4".'

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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