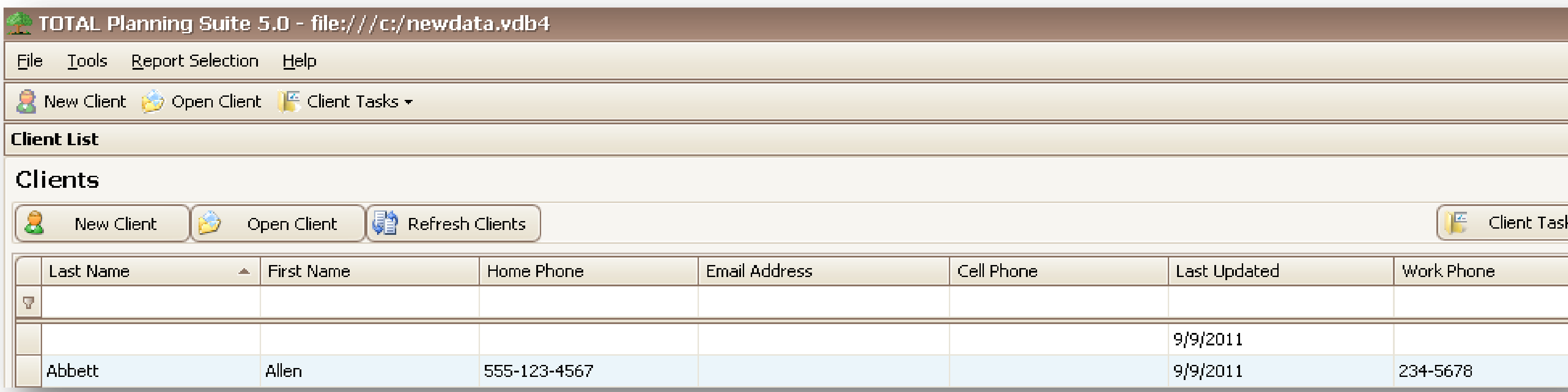
TOTAL Planning Suite Overview Tutorial



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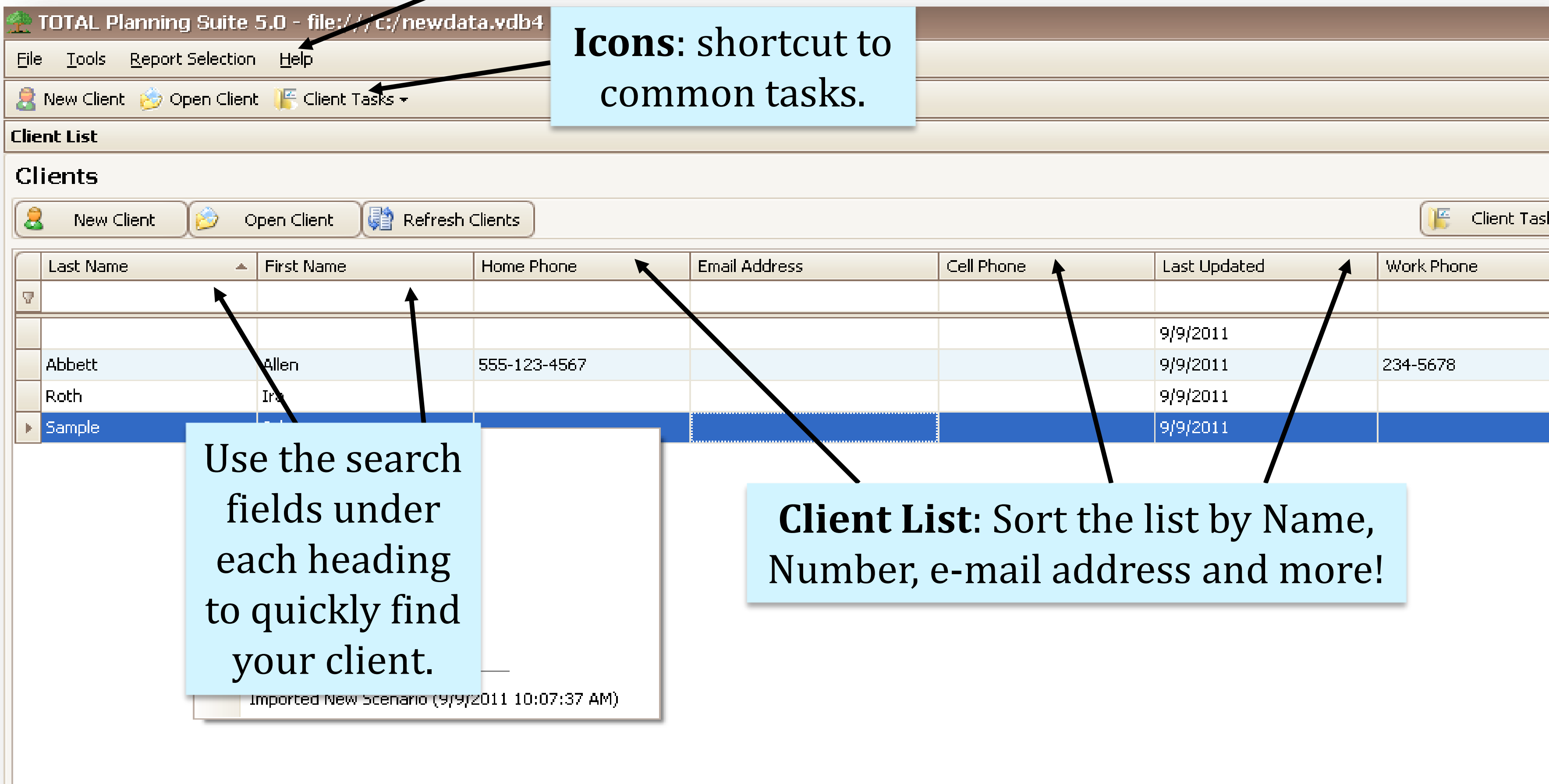
Client List: Start here

Menu Items: File, Tools, & More.

Icons: shortcut to common tasks.



Use the search fields under each heading to quickly find your client.

Client List: Sort the list by Name, Number, e-mail address and more!

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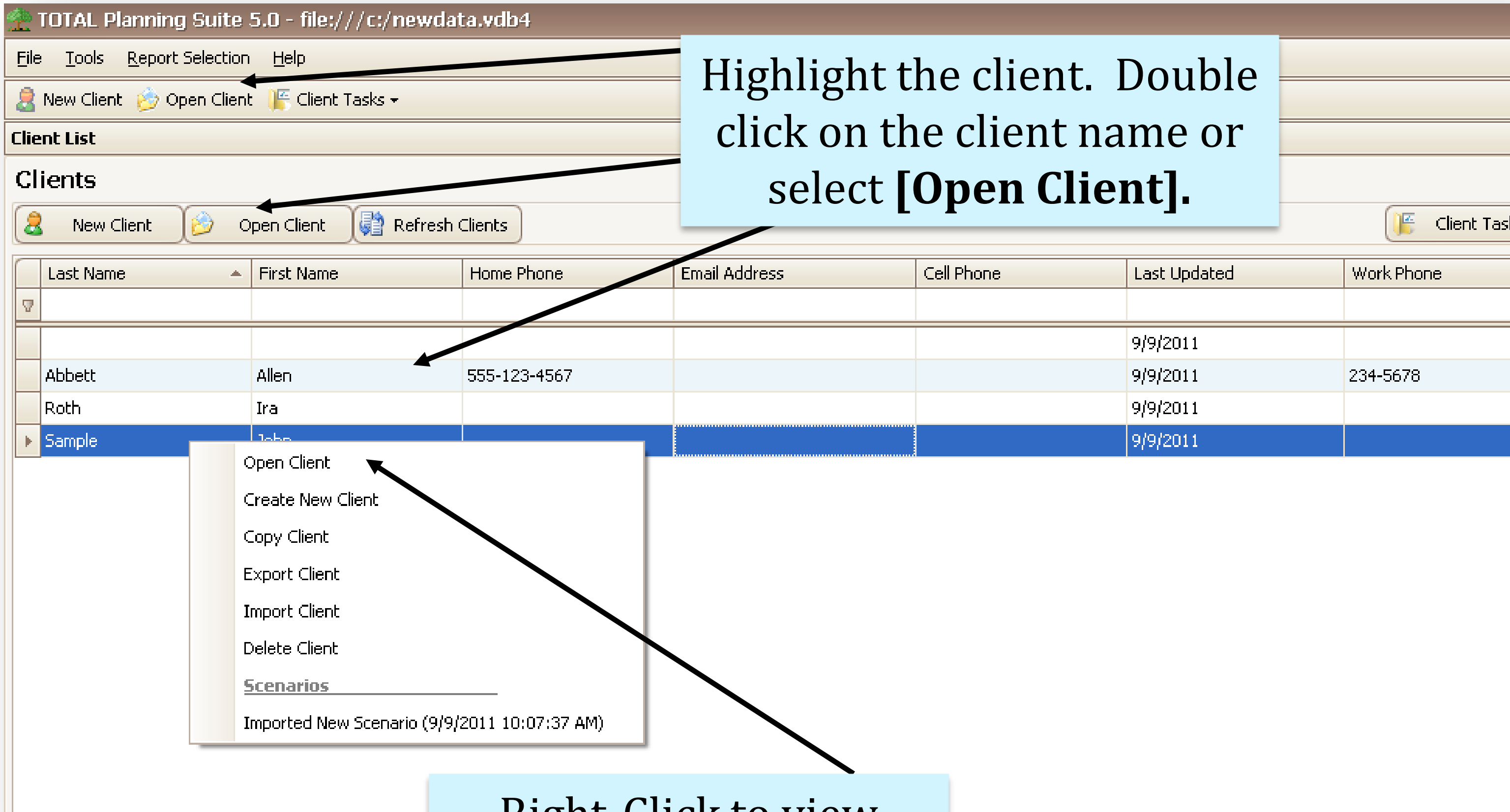
Opening a Client file



Highlight the client. Double click on the client name or select **[Open Client].**

Right-Click to view available Client options.

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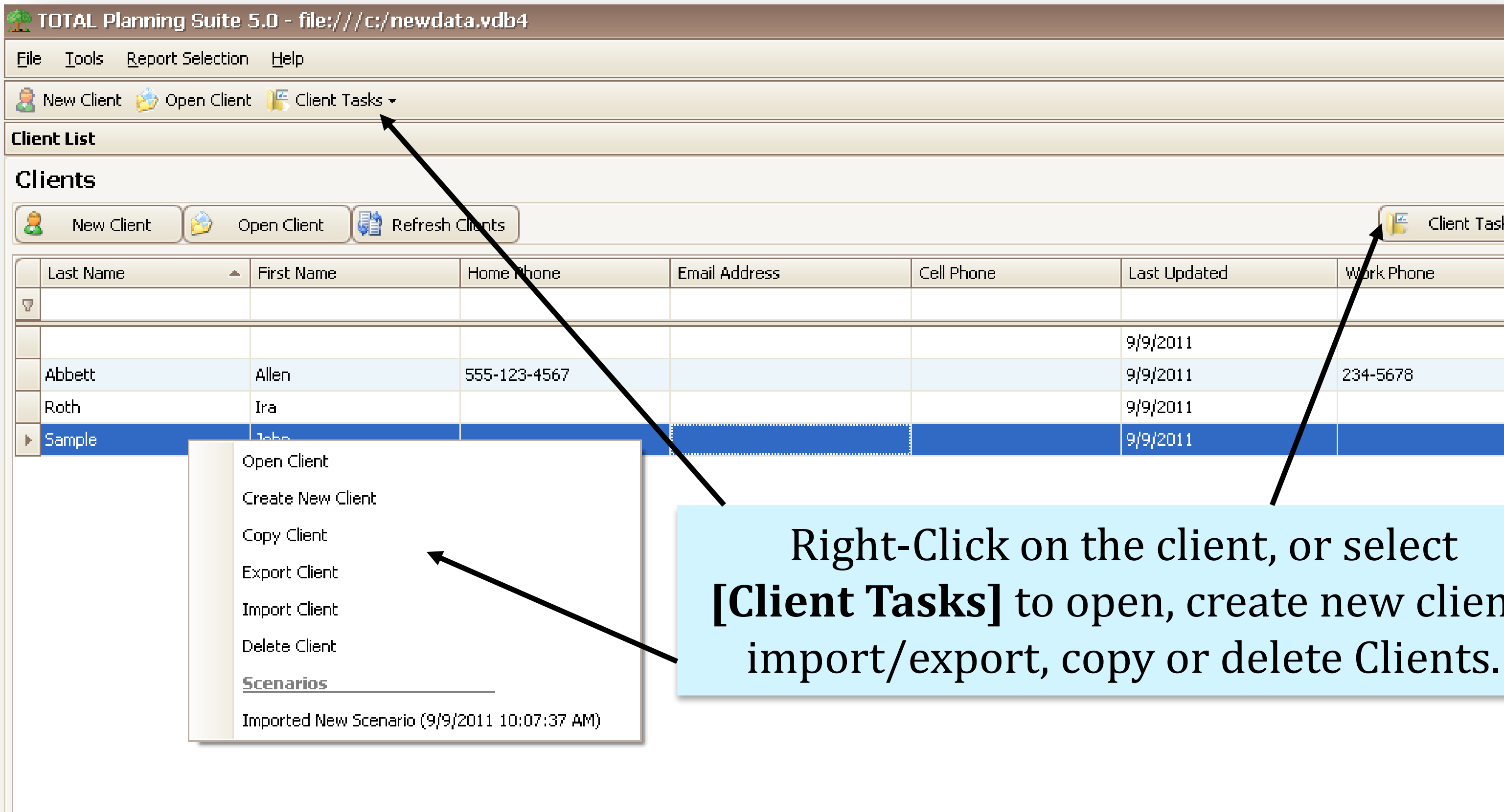
Client File Options



Right-Click on the client, or select **[Client Tasks]** to open, create new client, import/export, copy or delete Clients.

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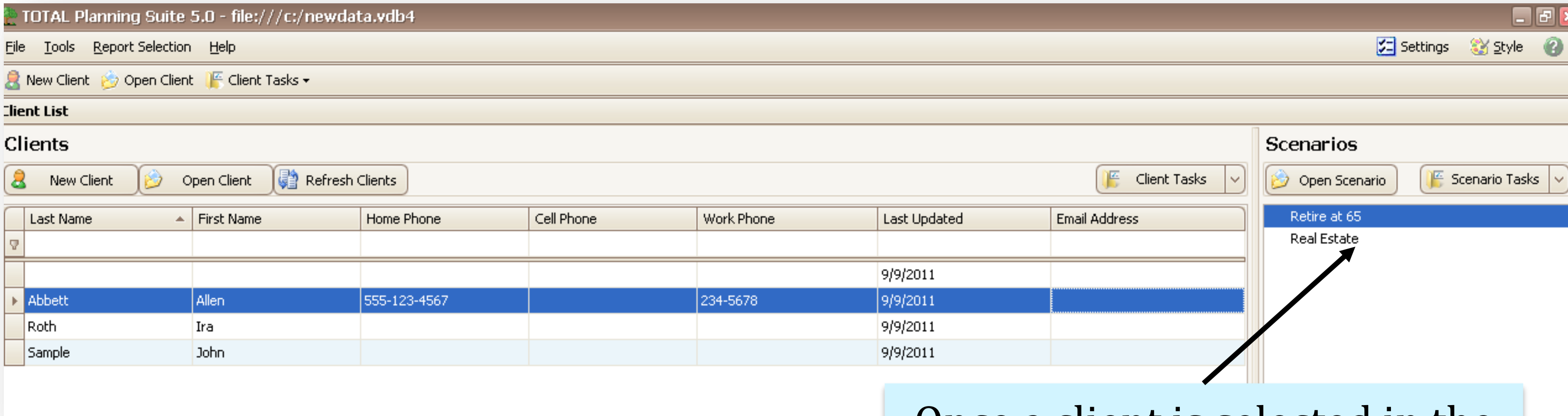
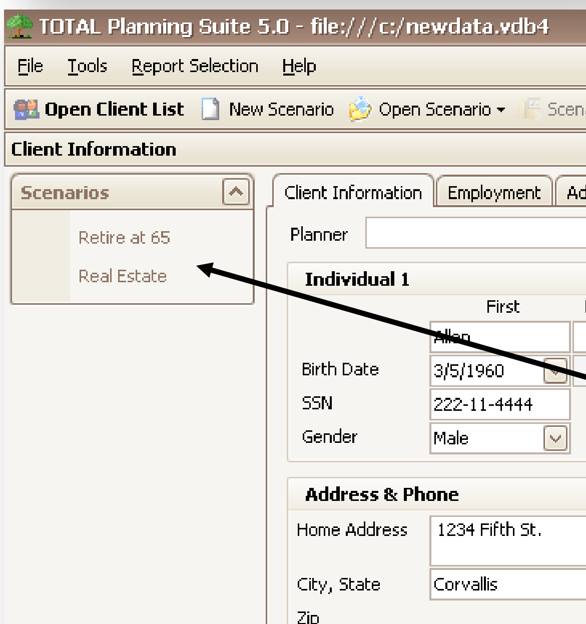
Scenario Selection



Once a client is selected in the list, you can instantly pick a scenario here. This will open the client and the desired scenario at the same time.



If the client file is already open, you can select the available scenarios here.

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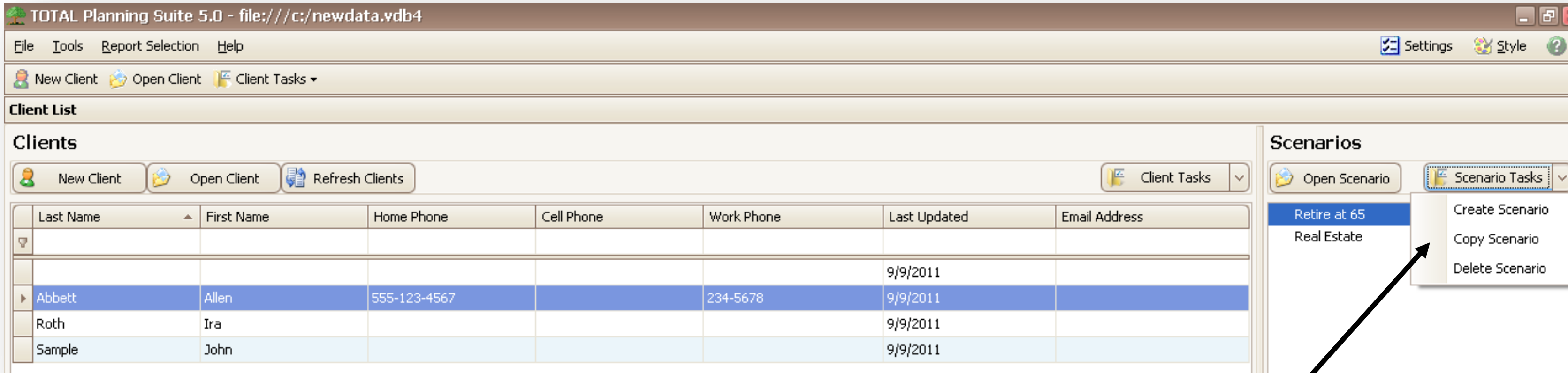
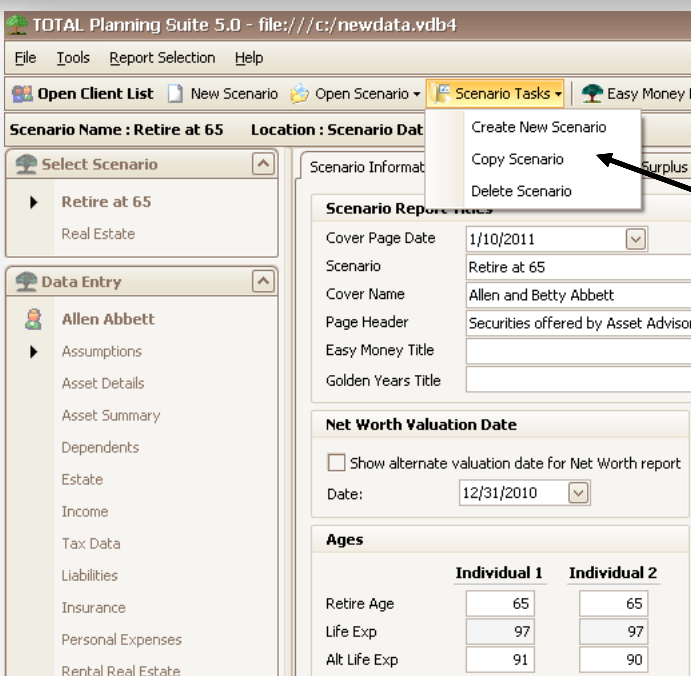
Scenario Tasks





You can create, copy or delete scenarios from either the **Client List**, or from within the client file by selecting the Scenario Tasks button.

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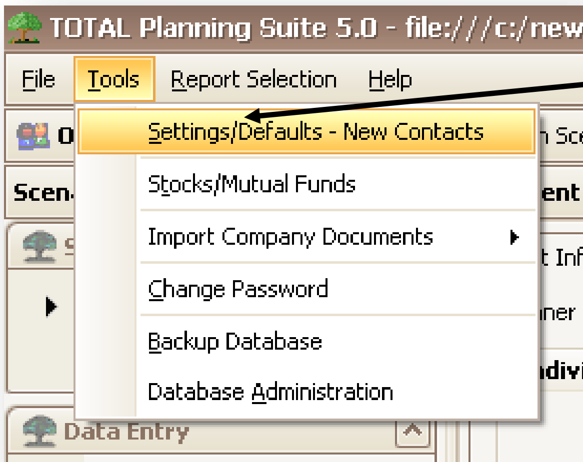
Settings and Defaults



Customize the default values and program settings to fit your preferences.

This will allow you to modify basic assumptions such as inflation, rates of return, or localized information regarding clients.

See the "***Settings***" tutorial for more information.

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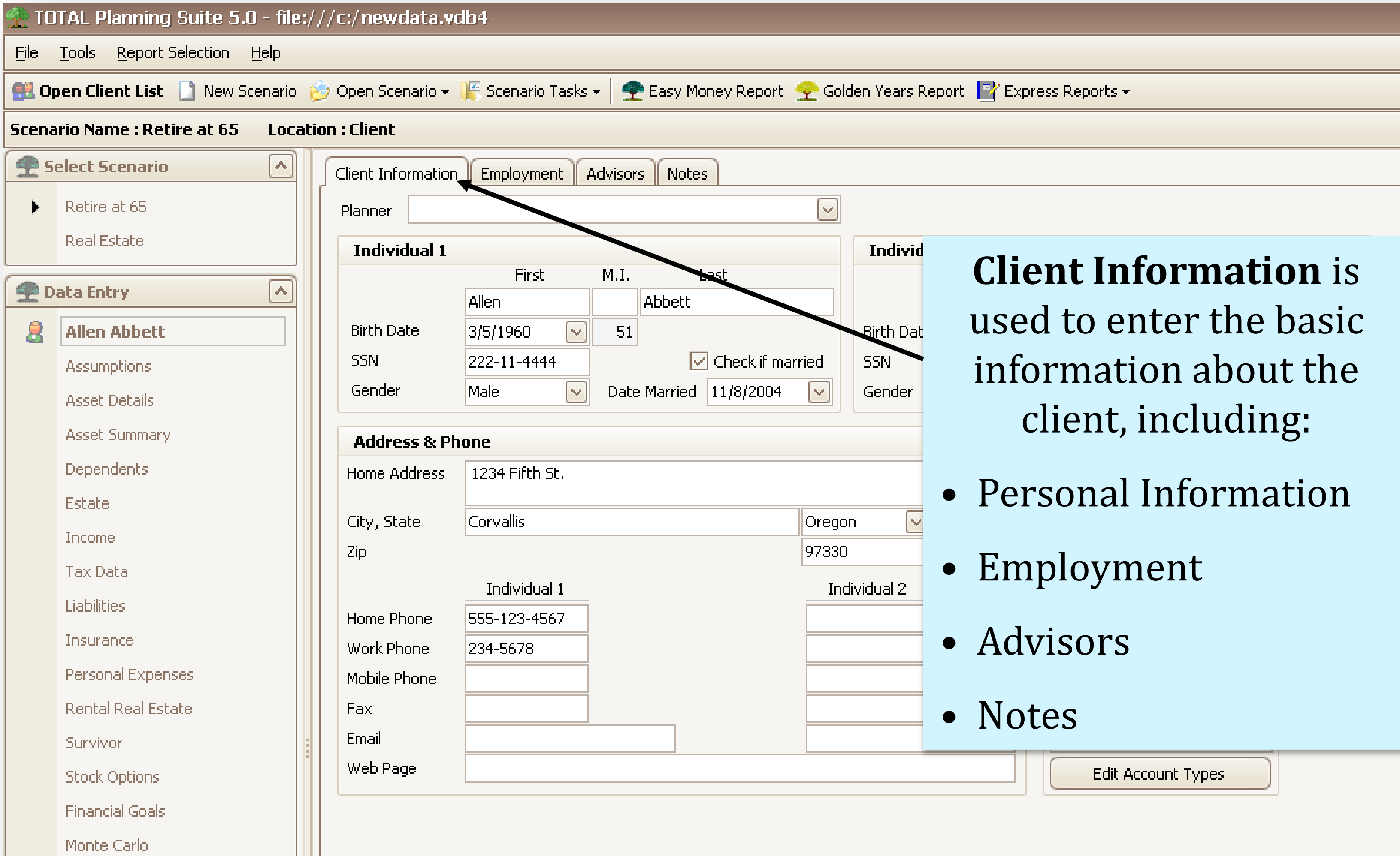
Contact Information



Client Information is used to enter the basic information about the client, including:

- Personal Information
- Employment
- Advisors
- Notes

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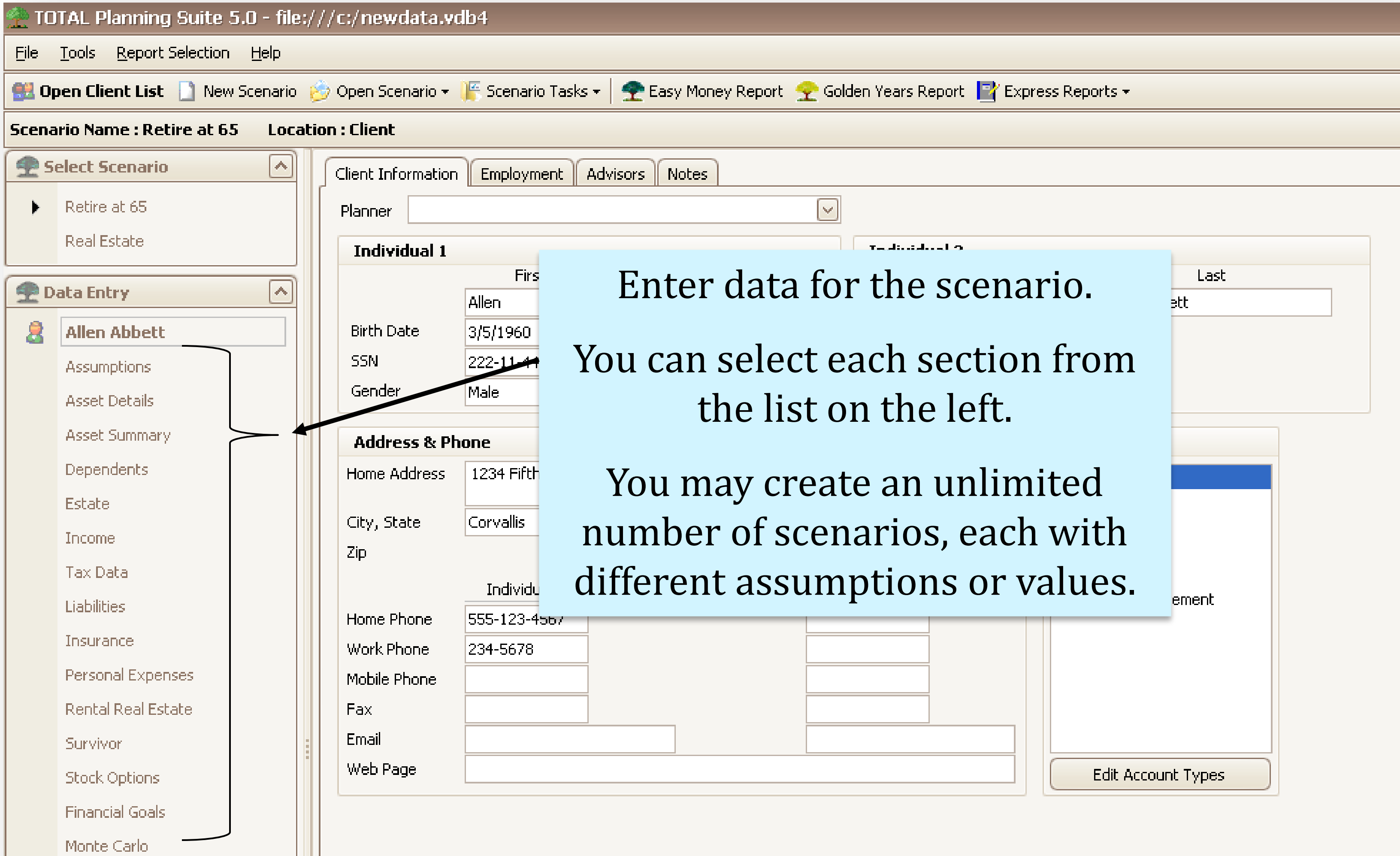
Scenario Data



Enter data for the scenario.

You can select each section from the list on the left.

You may create an unlimited number of scenarios, each with different assumptions or values.

*For more details on creating clients and scenarios, refer to the "***Clients and Scenarios***" tutorial.

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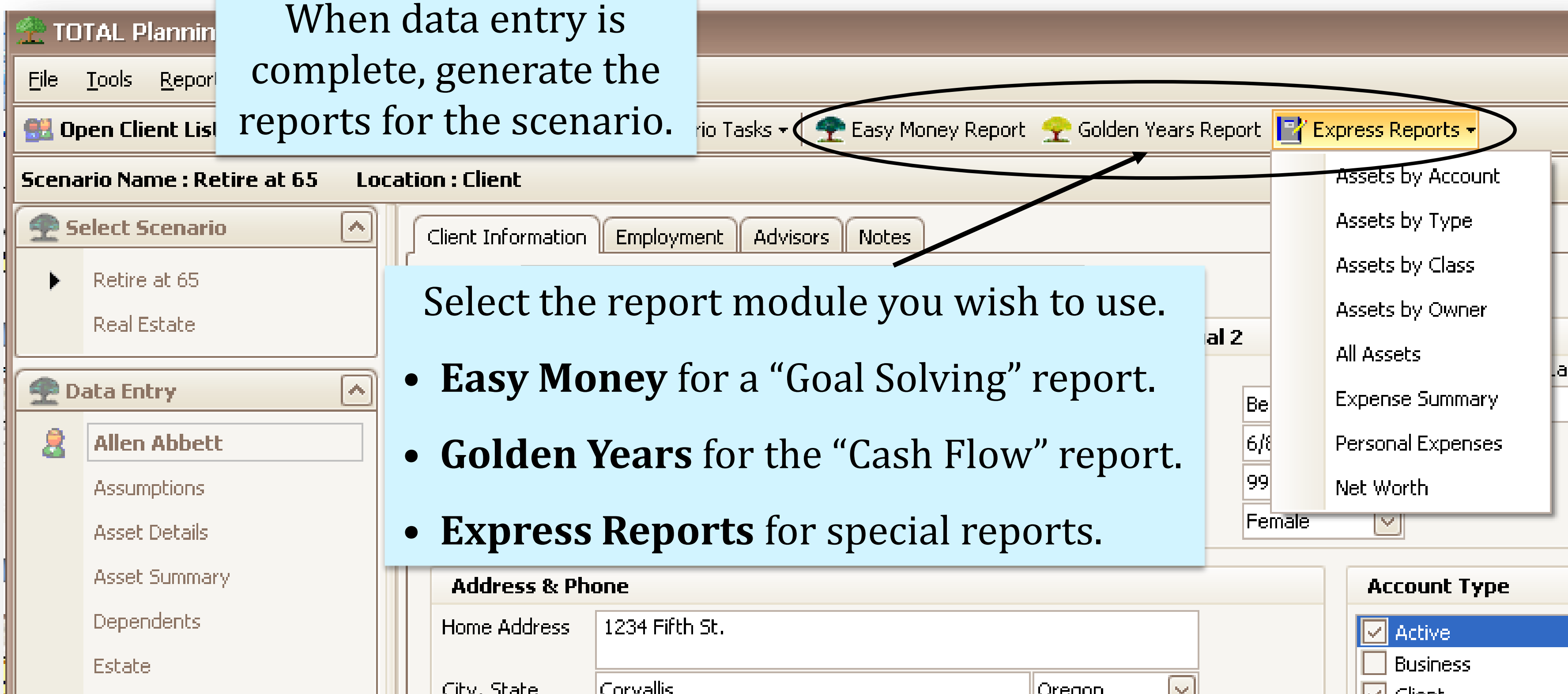
Generating Reports

When data entry is complete, generate the reports for the scenario.



Select the report module you wish to use.

- **Easy Money** for a "Goal Solving" report.
- **Golden Years** for the "Cash Flow" report.
- **Express Reports** for special reports.

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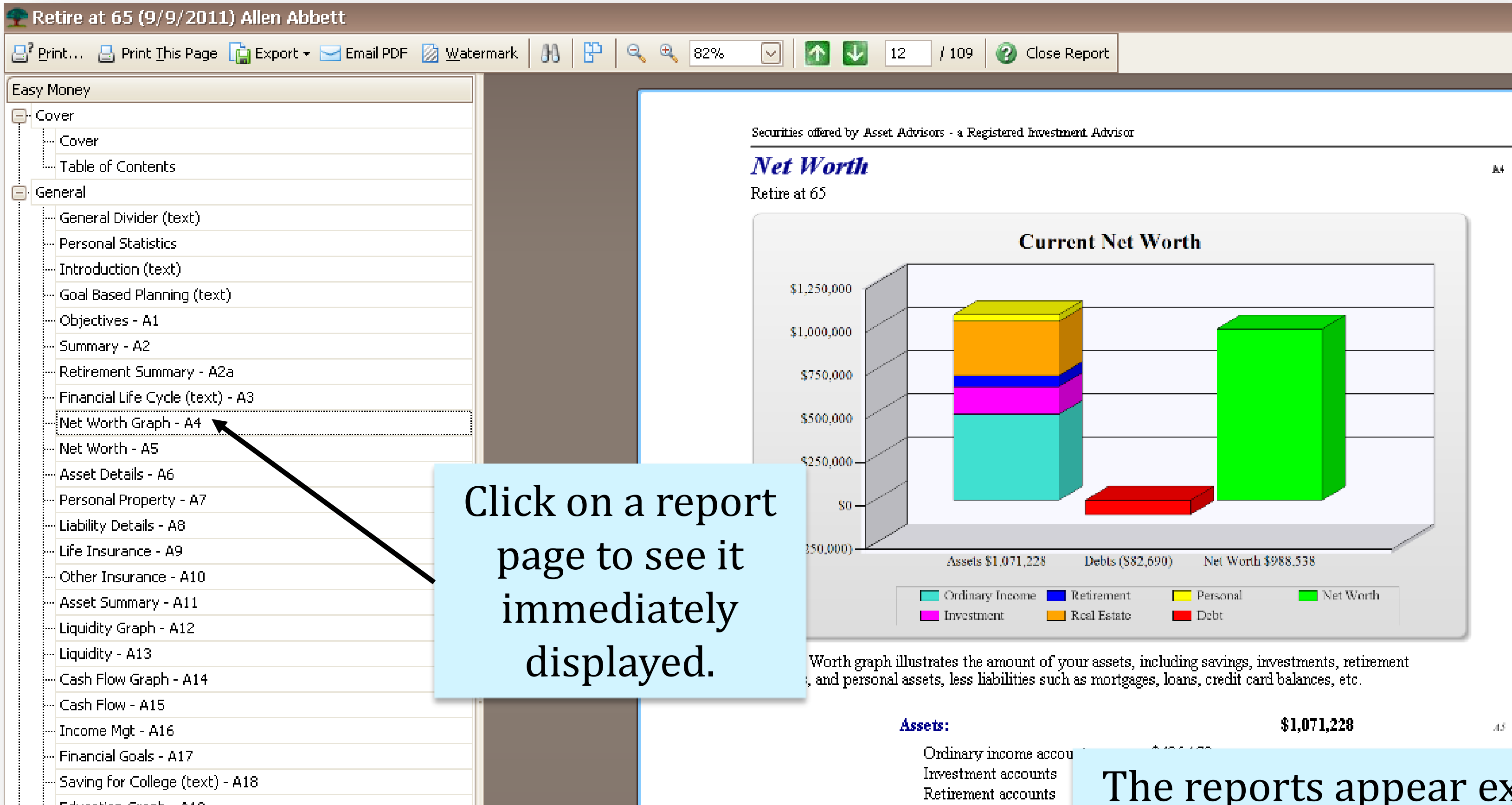
Viewing Reports



Click on a report page to see it immediately displayed.

The reports appear exactly as they will be printed.

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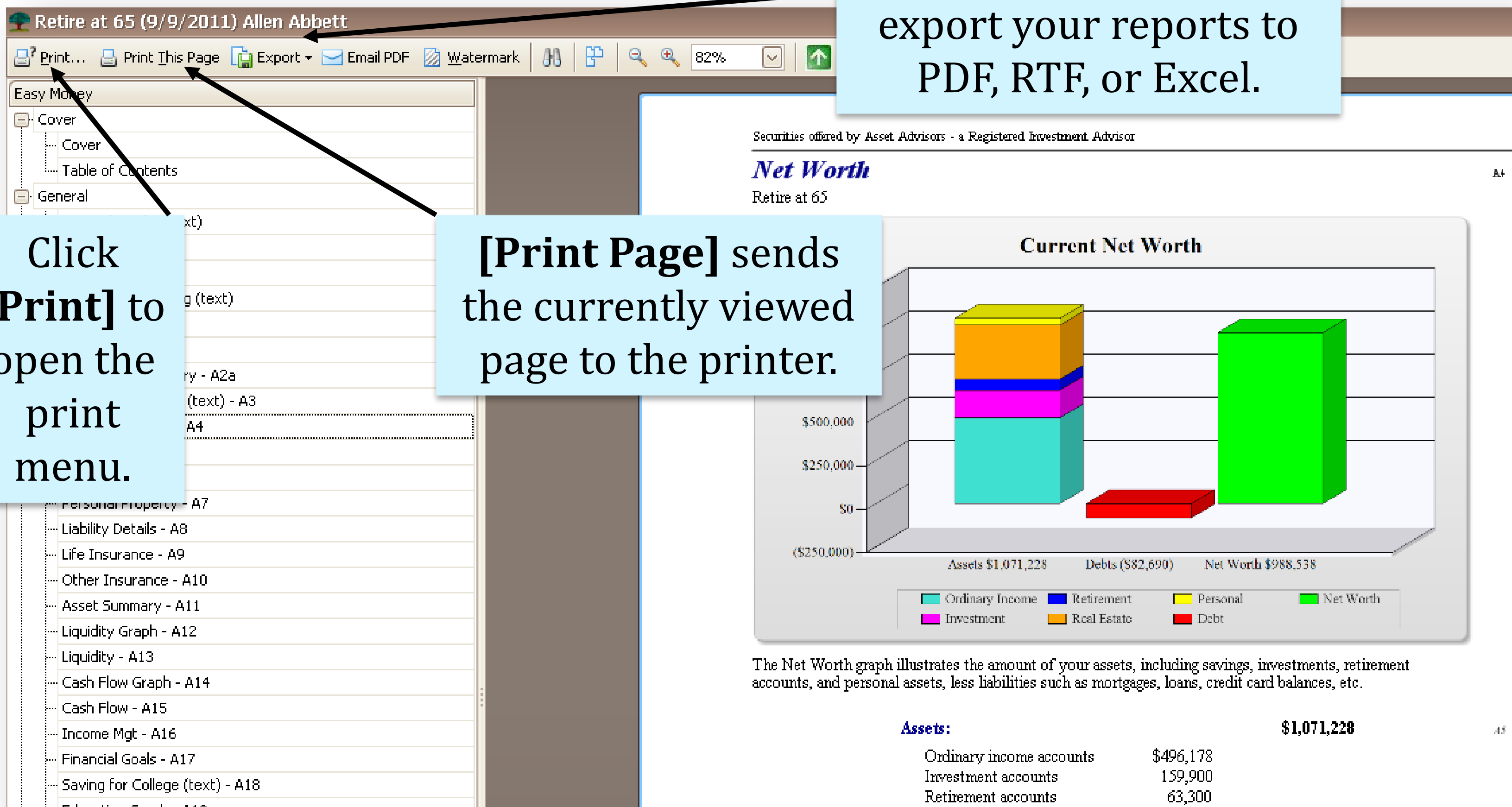
Printing/Exporting reports

[Export] Allows you to export your reports to PDF, RTF, or Excel.

Click **[Print]** to open the print menu.

[Print Page] sends the currently viewed page to the printer.



*For more details on viewing, printing or creating custom reports, refer to the "***Viewing/Printing Tutorial***".

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End of
Overview
Tutorial

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