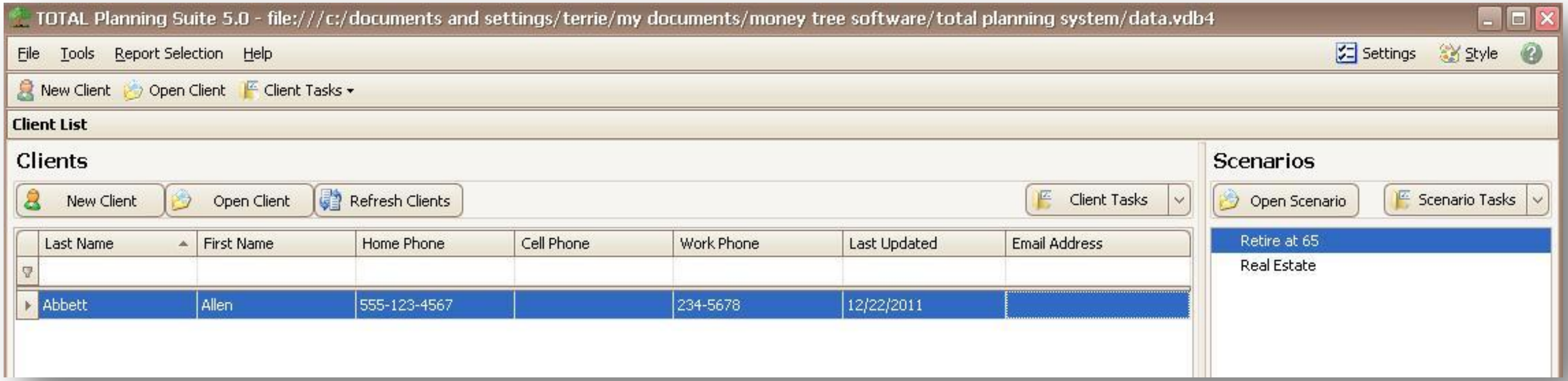
TOTAL Planning Suite

Client Data and Scenarios



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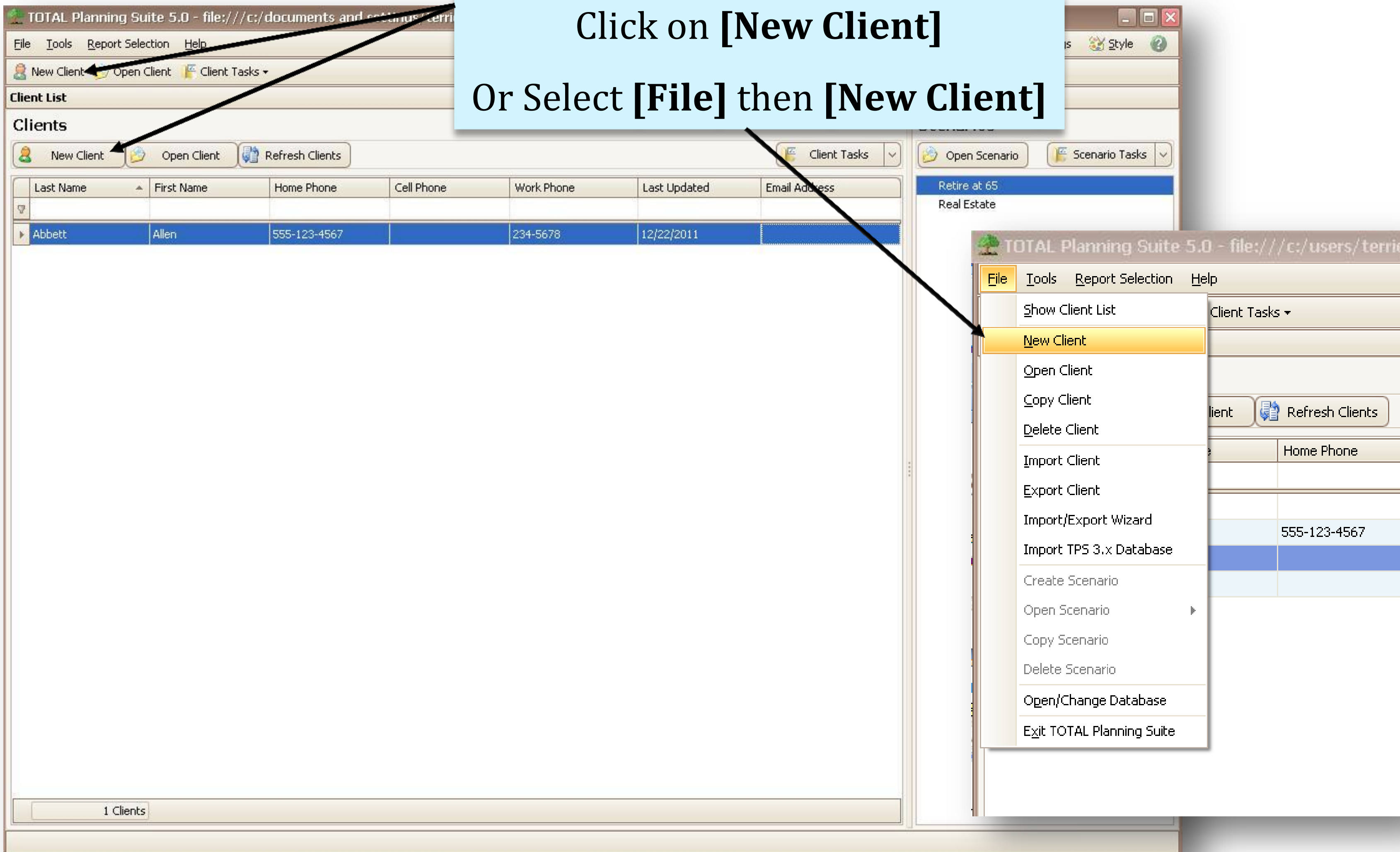
Creating a New Client

Click on **[New Client]**

Or Select **[File]** then **[New Client]**



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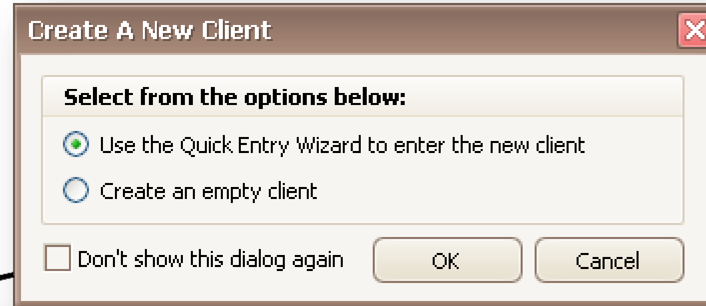
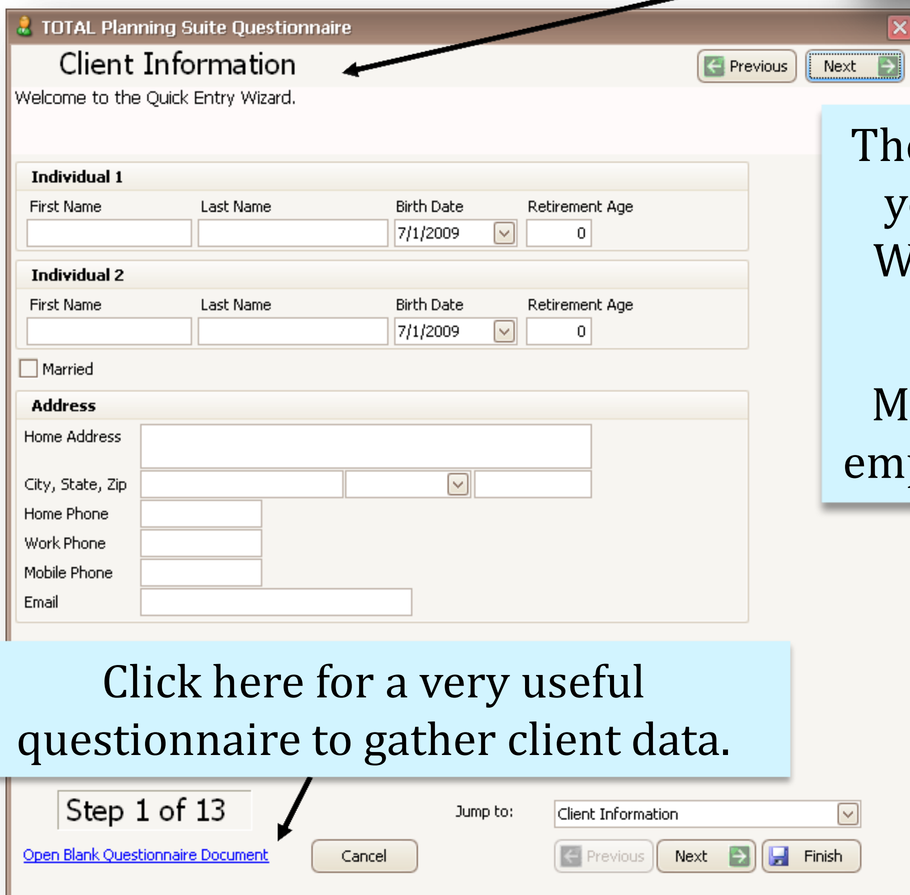
Quick Entry Wizard

Next, you will need to decide whether to use the **Quick Entry Wizard**, or to create a blank client.





The **Quick Entry Wizard** is great to get you started entering client data. The Wizard leads you through 13 steps to enter client data.

More experienced users often use the empty client option and skip the wizard.

Click here for a very useful questionnaire to gather client data.

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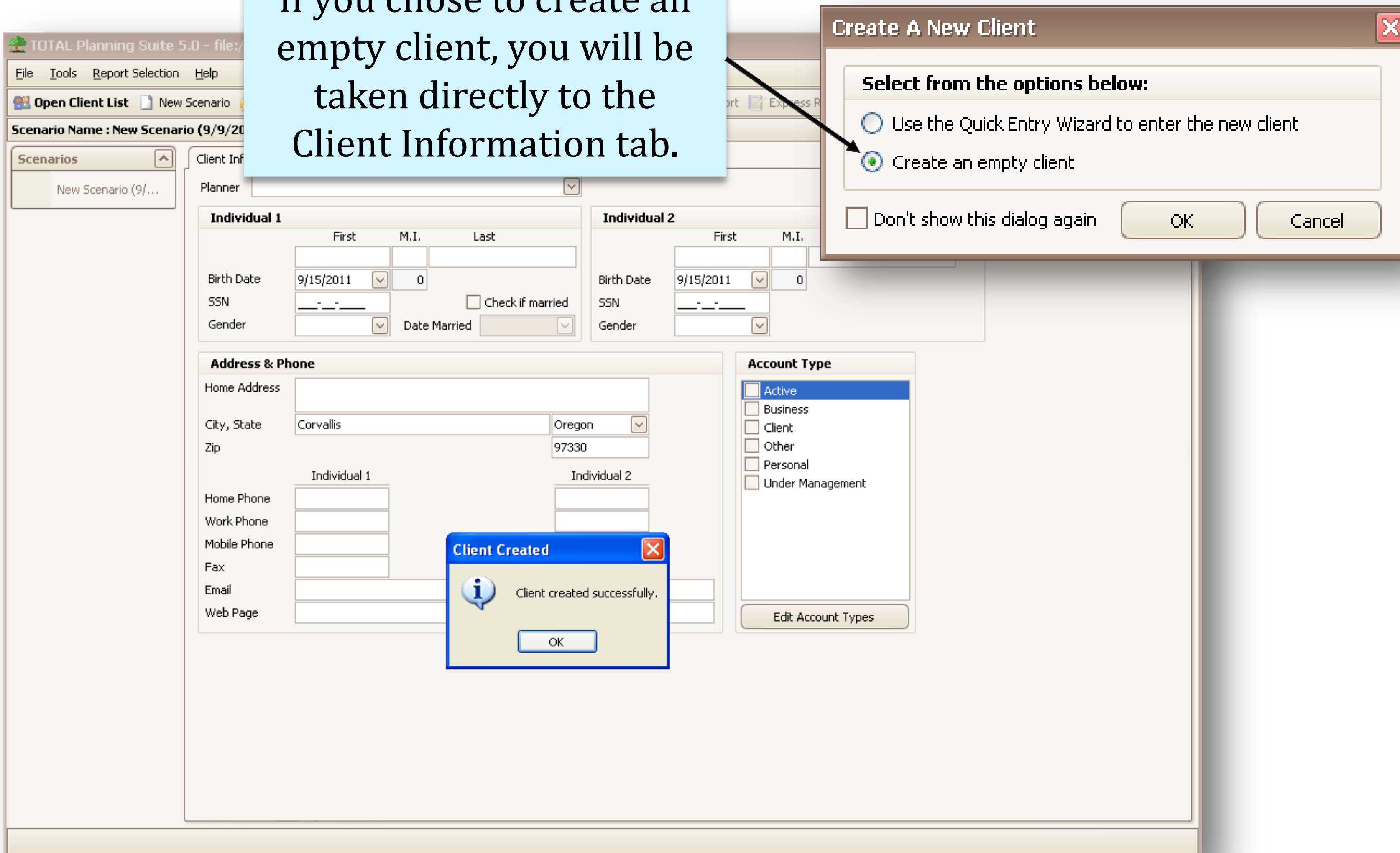
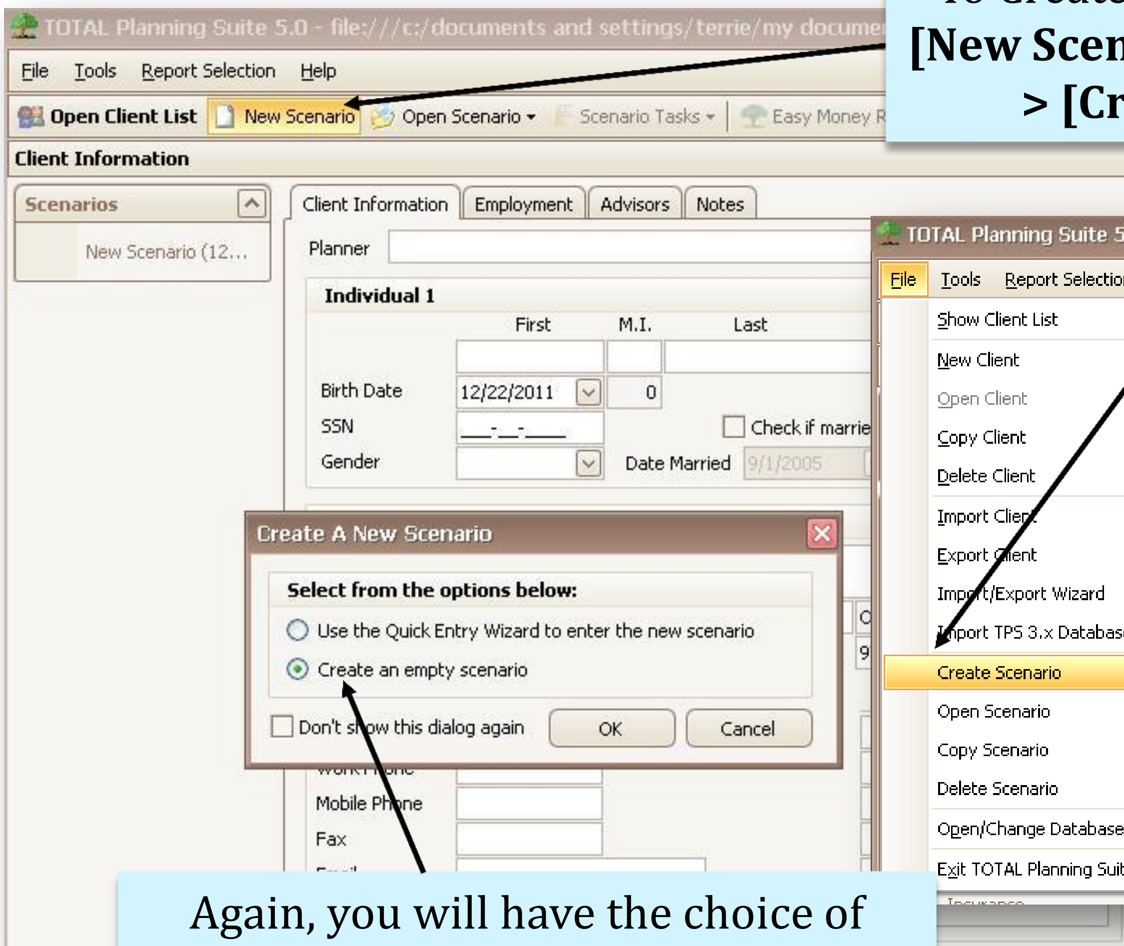
Create an Empty Client

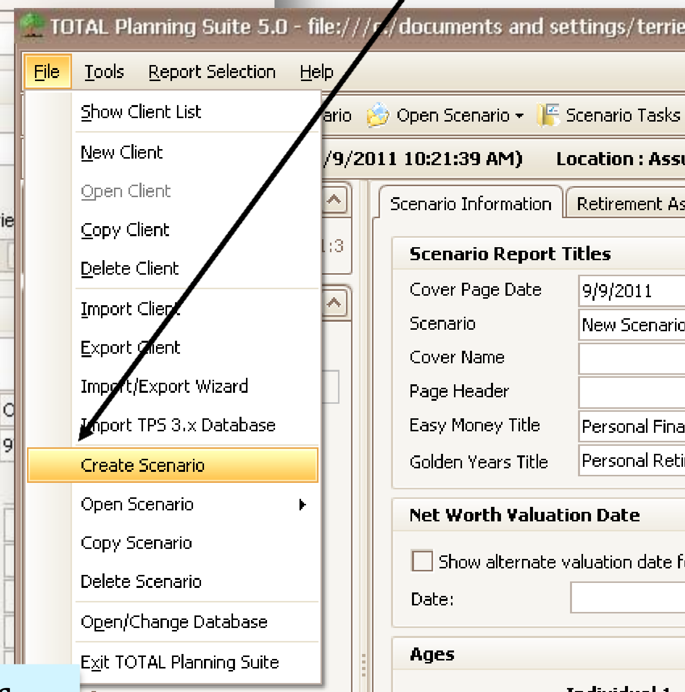
If you chose to create an empty client, you will be taken directly to the Client Information tab.



Create a New Scenario

To Create a scenario, click on **[New Scenario]** or select **[File] > [Create Scenario]**





Again, you will have the choice of using the **Quick Entry Wizard**, or starting with an empty scenario.

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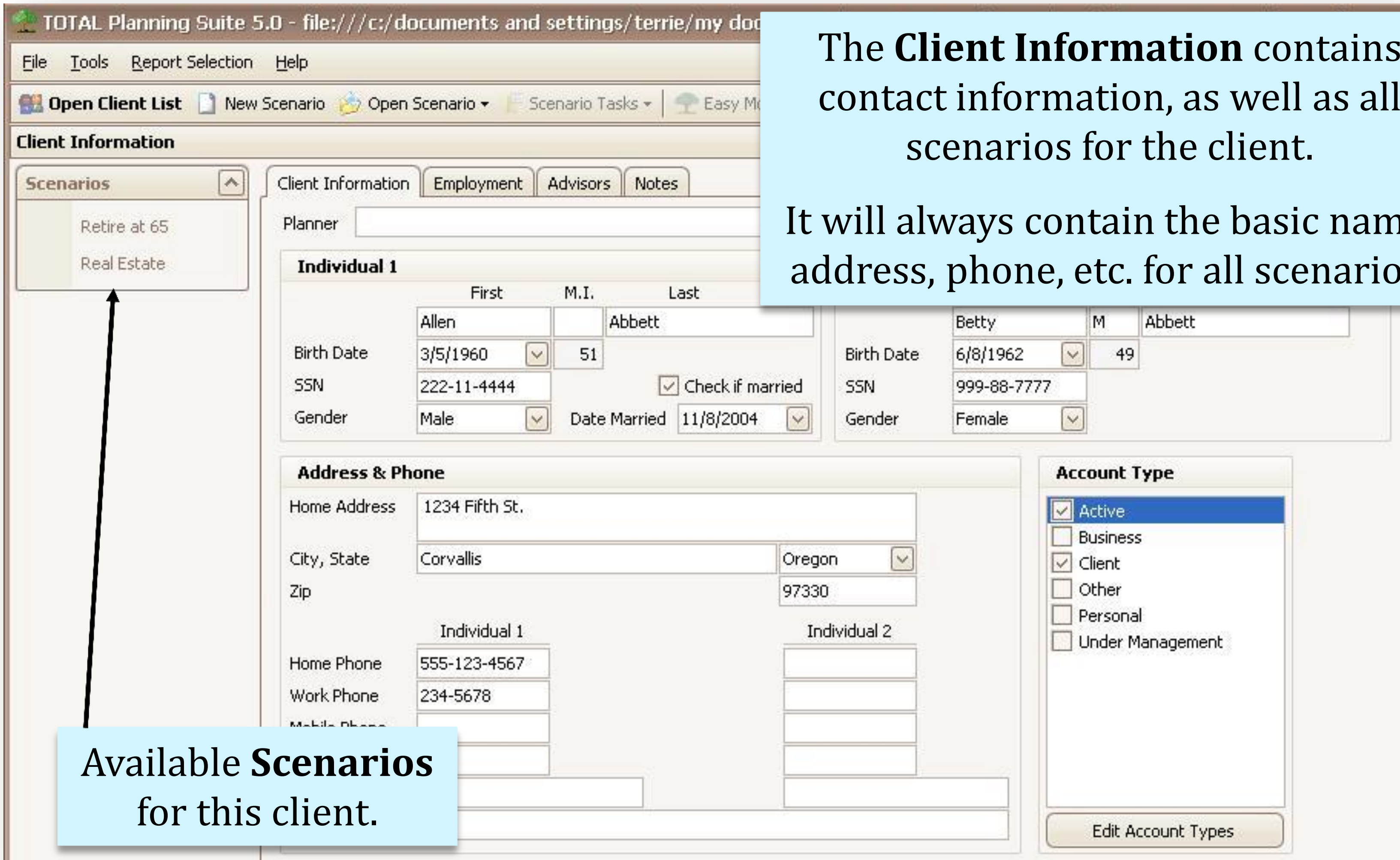
Client Information and Scenarios



The **Client Information** contains contact information, as well as all scenarios for the client.

It will always contain the basic name, address, phone, etc. for all scenarios.

Available **Scenarios** for this client.

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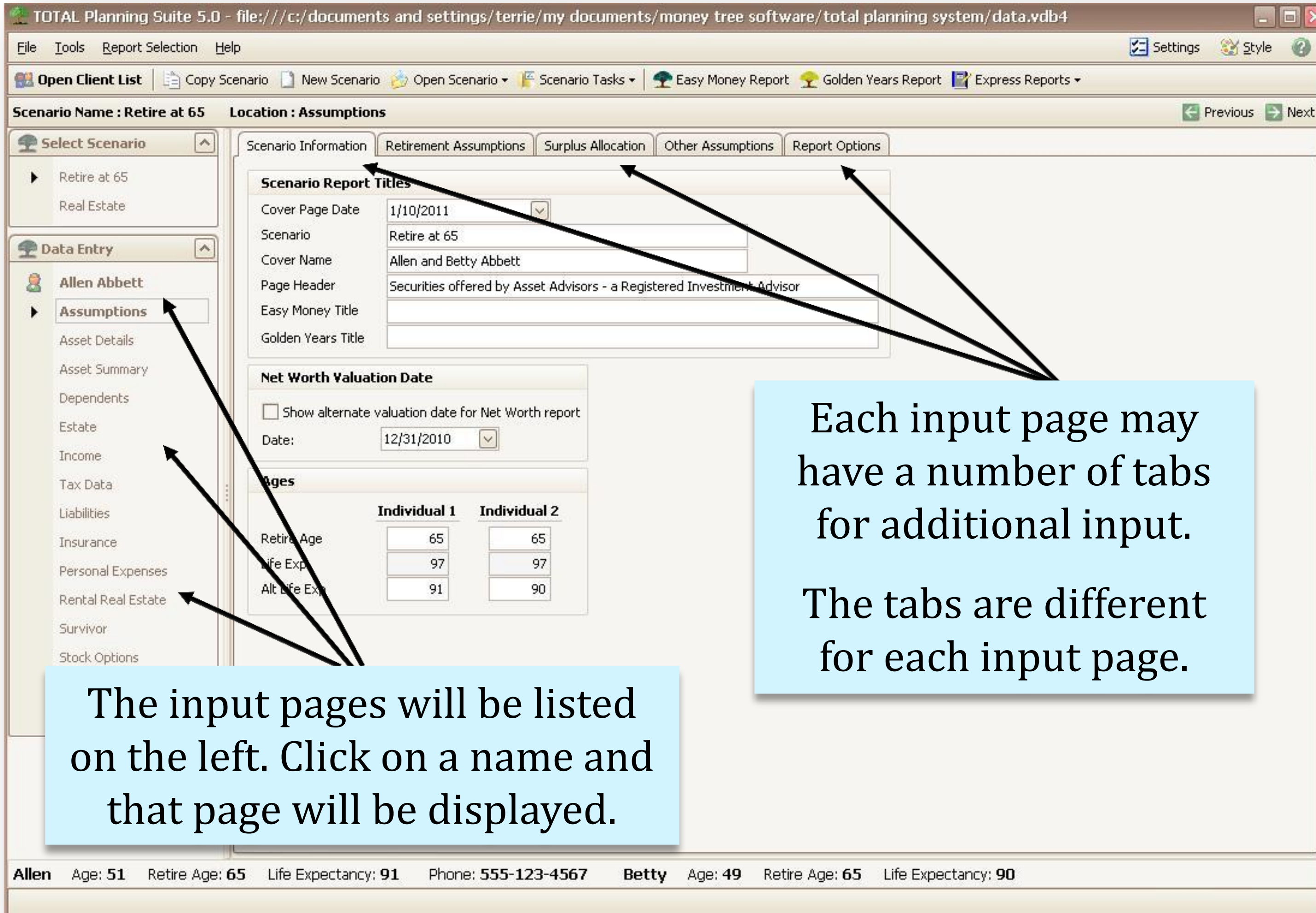
Scenario Information



Each input page may have a number of tabs for additional input.

The tabs are different for each input page.

The input pages will be listed on the left. Click on a name and that page will be displayed.

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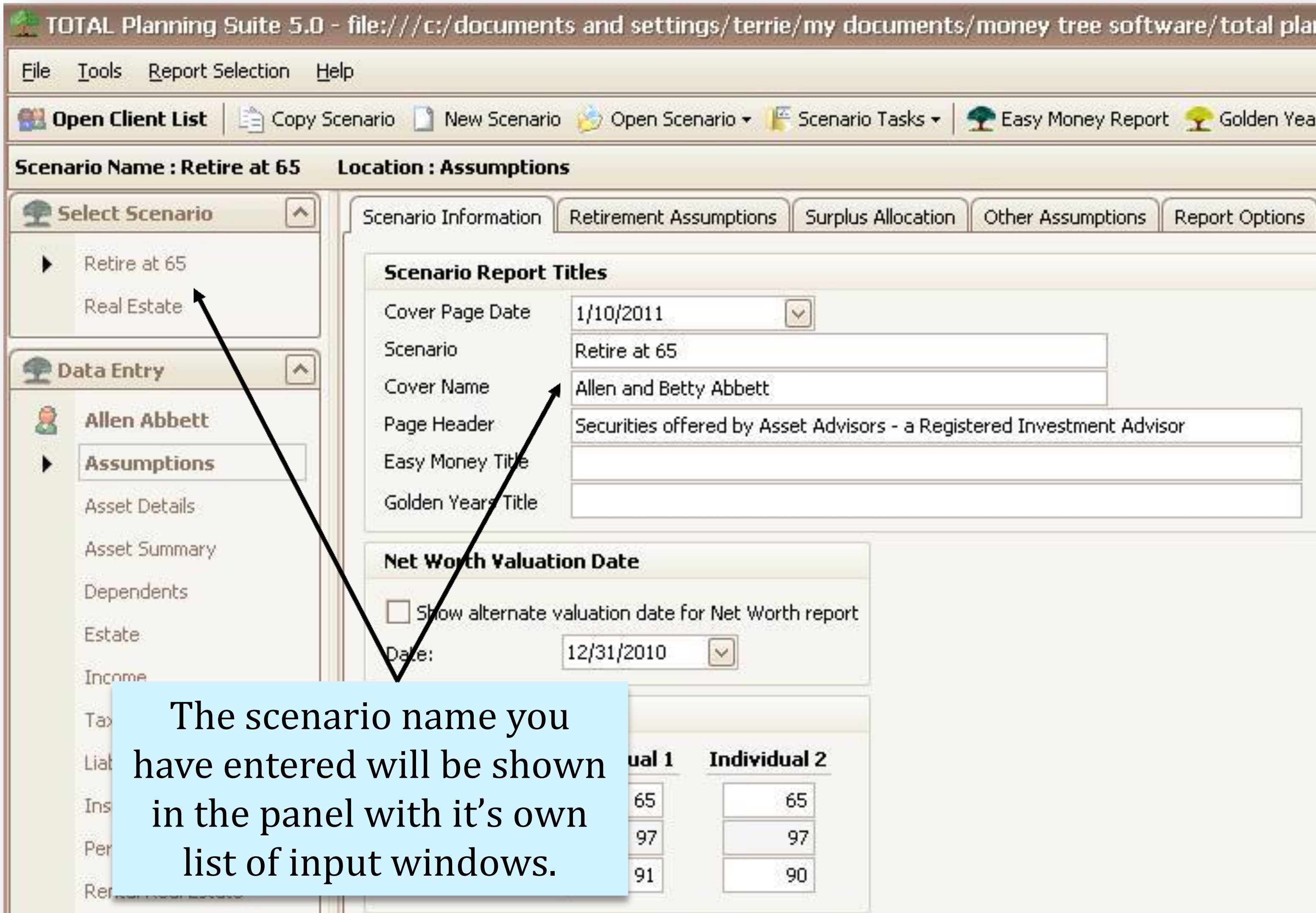
Scenarios cont.



The scenario name you have entered will be shown in the panel with it's own list of input windows.

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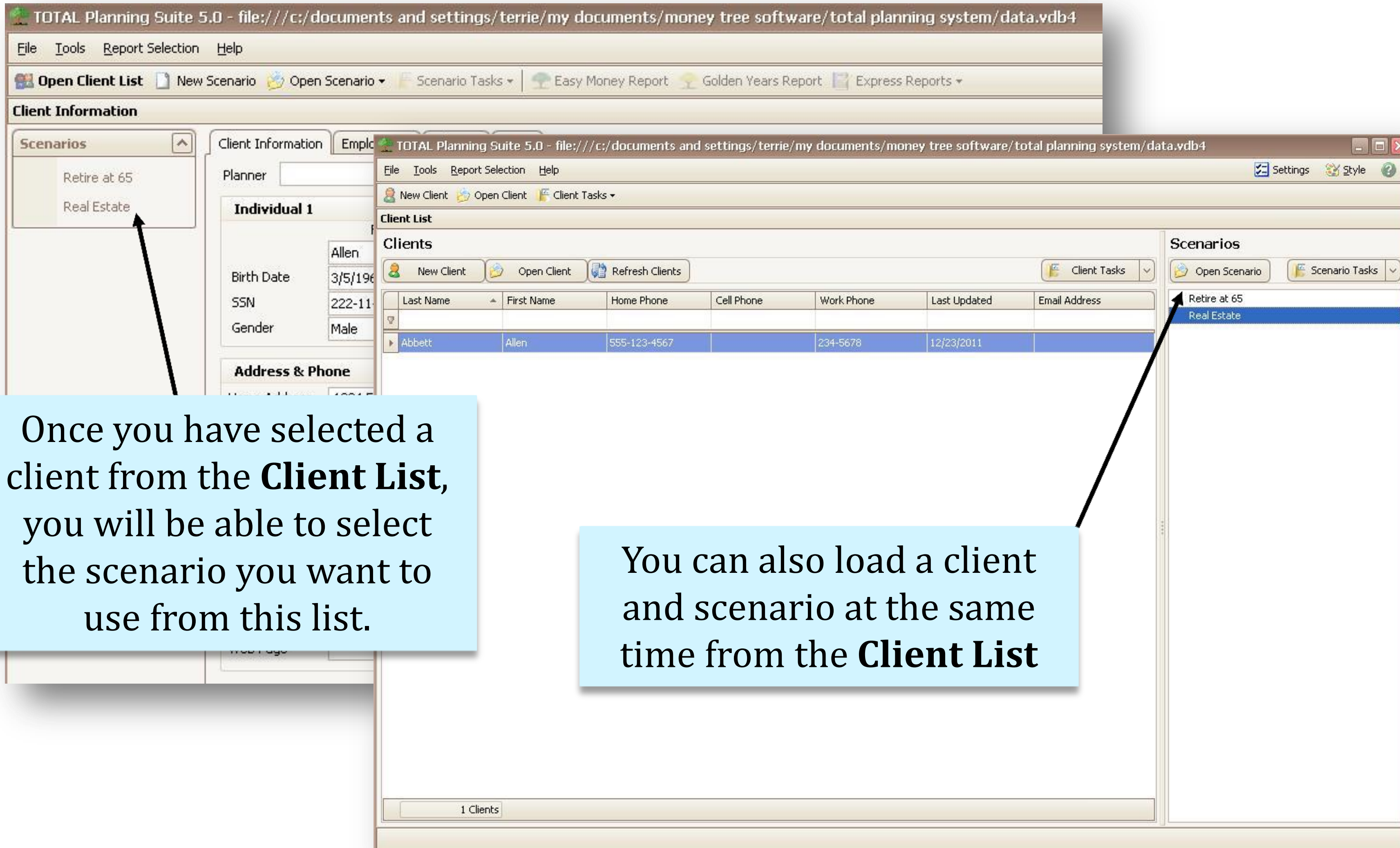
Scenario Selection



Once you have selected a client from the **Client List**, you will be able to select the scenario you want to use from this list.

You can also load a client and scenario at the same time from the **Client List**

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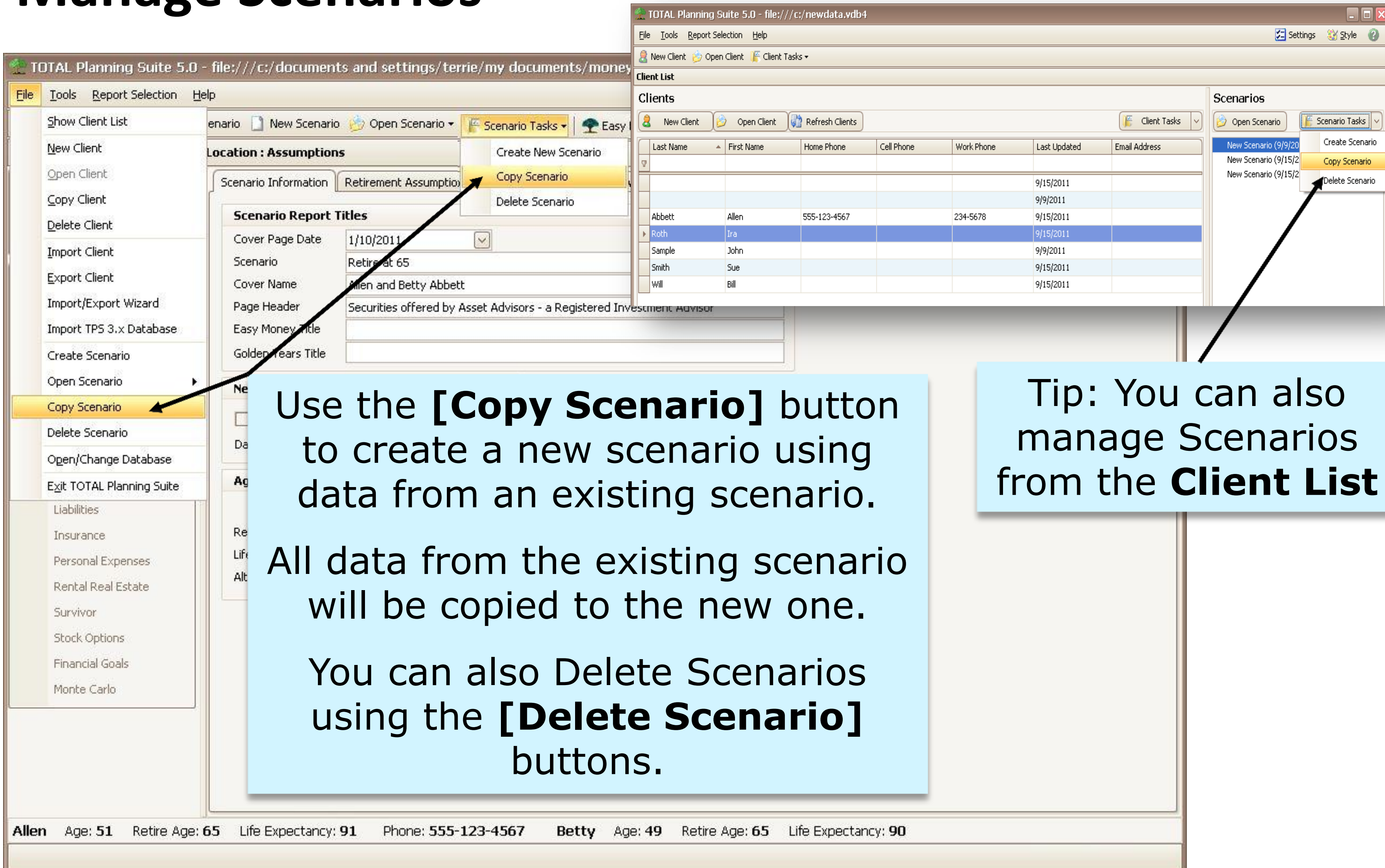
Manage Scenarios



Use the **[Copy Scenario]** button to create a new scenario using data from an existing scenario.

All data from the existing scenario will be copied to the new one.

You can also Delete Scenarios using the **[Delete Scenario]** buttons.

Tip: You can also manage Scenarios from the **Client List**

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End of
Client and Scenario
Tutorial