



NEW

Import/Export Task Wizard

- Data is imported from other software
- Import into TOTAL Planning System
- Export to several programs
- Many already available
- More to come



Easy Import/Export function

The screenshot displays the TOTAL Planning Suite software interface. The 'File' menu is open, showing options such as 'New Contact', 'Open Contact', 'Delete Contact', 'Copy Contact', 'Import TOTAL Contact', 'Export TOTAL Contact', and '15 More Imports/Exports' (which is circled in red). The 'Import Wizard' dialog box is also open, titled 'Total Planning Suite 2.5 or 3.0 Import Wizard for dbCAMS+'. It prompts the user to 'Select Information Source' and lists various software and data sources, with 'dbCAMS+' selected. A yellow callout bubble points to the 'dbCAMS+' option with the text 'Select source of data.'.

File Tools Help

Find Refresh Import/Export

Contact List

Import Wizard - c:\documents and settings\mike

Help

Import

Send information from TOTAL Planning Suite to other

2002 Year end

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Brown

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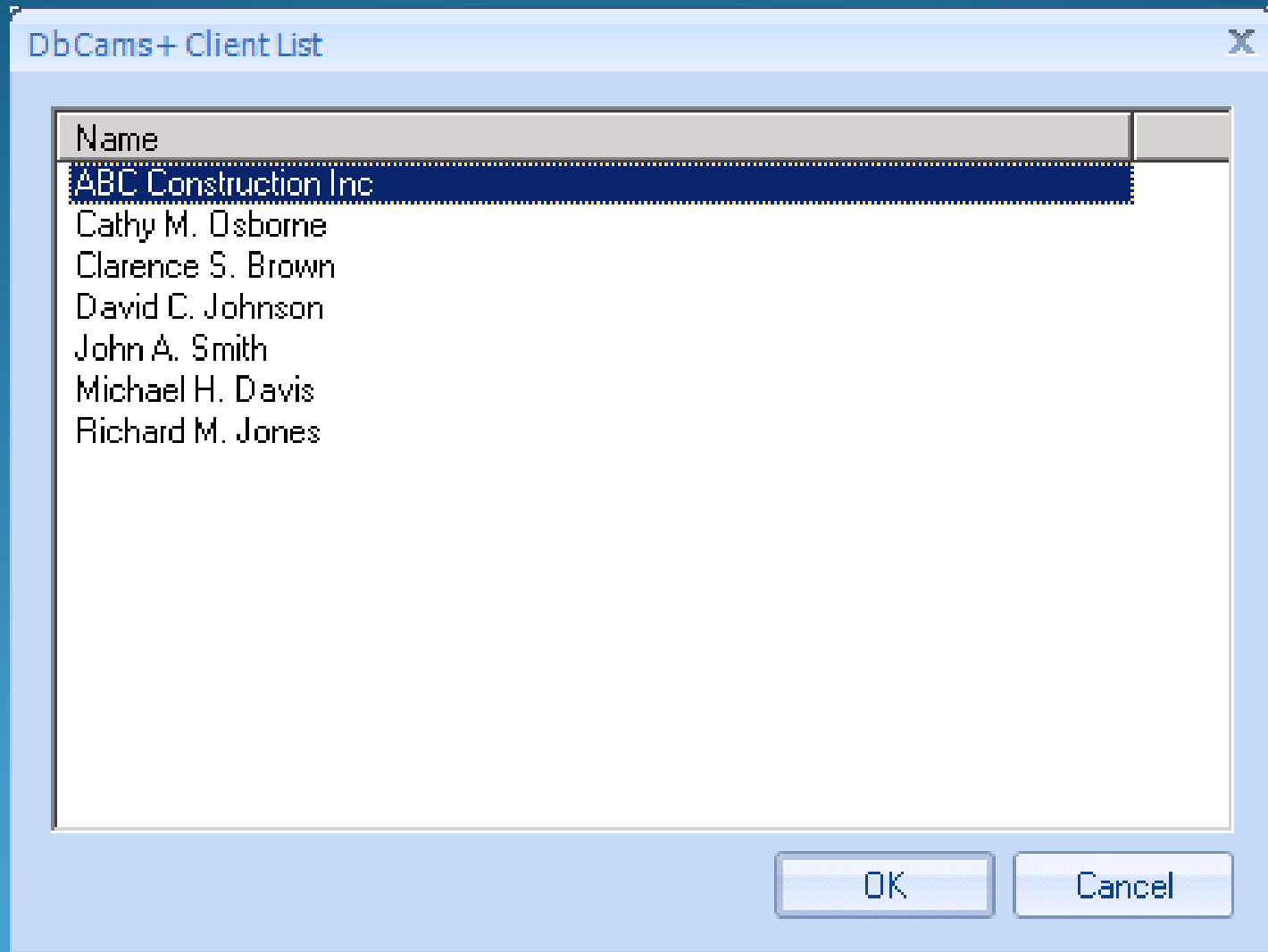
Select Information Source

Click on one software or data source from the list. Click "Info-Match" if you are using the list. "Info-Match" is a multi-function importing tool that allows you to import data from a variety of sources into TOTAL Planning Suite or Silver Financial Planner.

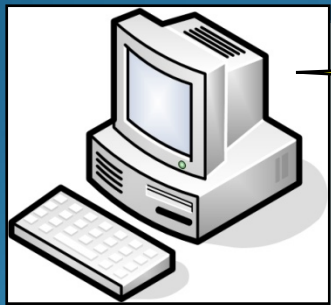
- TOTAL Planning Suite
- ACT!
- Act4Advisors
- Advisor Exchange
- Advisors Assistant
- Albridge Solutions
- dbCAMS+**
- Info-Match (text file data wizard)
- Junxure-i
- Microsoft Outlook
- ProTracker Advantage
- PortfolioCenter
- PortfolioCenter Relationship Manager® (PCRM)
- Redtail
- Silver Financial Planner
- Secure Online Planning Survey
- WebAllly

Select source of data.

Select Contact to Import

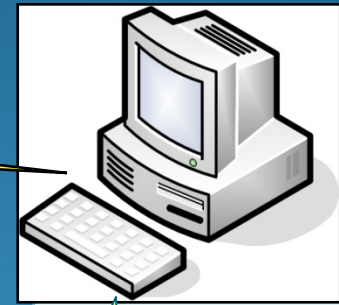


Data is "Mapped"



Your CRM or
Portfolio
Management data

Import/Export Wizard
grabs data and puts it in
the corresponding Money
Tree field.



Money Tree
TOTAL Planning
Suite data

Import Fine-Tuning

- Depending on the source, you may need to edit:
 - Asset Group, Class or Type
 - Ownership
 - Some personal data
- That's better than entering everything by hand!



NEW

Info-Match Wizard

- For the first time – a “do it yourself” tool so you can create your own data import mapping process.
- Import from nearly **ANY program** that will export a *Text or XML* file.

Info-Match for Do-it-yourself

Select Information Source

Click on one software or data source from the list. Click on the list, "Info-Match" is a multi-function importing tool that a

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Redtail

Silver Financial Planner

Secure Online Planning Survey

WebAlly

Choose Info-Match
from the menu.

Info-Match Wizard Selections

The screenshot shows the TOTAL Task Wizard application window. The title bar reads: "TOTAL Task Wizard - c:\documents and settings\mike\local settings\application data\money tree software\total planning system\new25.tpsdb". The menu bar includes "File" and "Help".

The main area is divided into two columns:

- 1) Select a product.** This column contains a list of products, with "Info-Match (text file data wizard)" selected and highlighted in blue. Other products listed include: TOTAL Planning System, ACT!, Act4Advisors, Albridge Solutions, dbCAMS+, Junxure-i, LaserApp, Microsoft Outlook, ProTracker Advantage, PortfolioCenter, PortfolioCenter Relationship Manager® (PCRM), Redtail, Silver Financial Planner, Secure Online Planning System, WebAlly, and Additional Wizards.
- 2) Select a task.** This column contains a list of tasks, with "Import contact data from delimited text files (*.csv, *.txt)" selected and highlighted in blue. Other tasks listed include: Export contact data to delimited text files (*.csv, *.txt), Export user-defined data to delimited text files (*.csv, *.txt), Import contact data from an XML data set files (*.xml), and Import user-defined data from delimited text files (*.csv, *.txt).

A yellow callout box with a blue border is centered in the "2) Select a task." area, containing the text: "Match field names in your program with the corresponding names in Money Tree."

At the bottom of the window, there is a "Run Task" button. Below the main content area, a status bar displays "Press F1 for help." on the left and "CONNECTED" on the right.