

FFM Desktop User Manual



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Getting Started: Welcome

Welcome to financefilemanager Desktop Version 2.0!

The FFM Desktop 2.0 application allows you to easily and securely post files directly to the financeware.com website for your clients to view. Conveying investment research, newsletters and reports has typically involved printing hardcopy, stuffing envelopes, mailing, and waiting. With FFM, you simply print from your favorite financial applications or select files already on your computer—like Word or Excel files—and securely send them up to your client's document folders at financeware. As an added benefit, FFM Desktop will generate and send customized messages to your clients whenever you post new documents for them to review. And it is just as easy to post a newsletter to all of your clients as it is to post a single report to an individual client. Please see "Using FFM Desktop" for more information, or check our Support section.

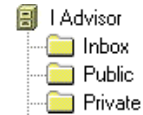
The FFM tool uses the familiar Windows™ Explorer-style of 'folders and files' to let you easily organize the documents that you want available to your clients when they login to their financeware.com account. If you have ever used Explorer before, you will be right at home with FFM Desktop.

**** Compatibility with FFM v1.0 ****

Users of FFM v1.0 will be able to access their existing FFM documents. Documents produced and uploaded by FFM v1.0 can be easily managed using the FFM Desktop v2.0 product.

Using FFM Desktop: Your Folders










In your file list, you can save documents, using the Inbox, Public, and Private folders. You can also create additional folders and sub-folders in which to store documents. To move the files, drag the file from the Document list to the file in the "Folders" list in which you want to place it.



While on-line, you can access your FFM files by clicking on your Documents tab. You will see your folder list on the left side of your screen, and the document list for the folder you have opened on the right side.

Inbox

Any document you have placed in your desktop Inbox will appear in your on-line Inbox and will not be seen by your clients. You can move documents to the Public folder or to any client's Private folder from your on-line Inbox. From this screen, you can move and delete the files using the Command Menu.

Inbox Documents:		
Document Name	Upload Date	Command Menu
 TEST99119911	3/12/2001 5:02:35 PM	 
 test99999	3/12/2001 4:44:51 PM	 
 TEST88888	3/12/2001 4:38:18 PM	 

On-line View of the Inbox (the Public and Private Document Lists have similar views)

Public

Documents placed in your Public folder will be received by all of your clients and will appear in their Public folder. From this screen, you can move and delete the files using the Command Menu.

All files placed in the Public folder are delivered as copies to your clients and appear in their Public folder. They have the ability to copy and make changes to these files, but the original (in your Public folder) will remain unchanged. Copies of files are marked in your FFM Document list with a yellow icon.

Private

Documents placed in a *client's* Private will be received only by the client that you specify and will appear in their on-line Private folder. Your Private folder acts much like your Inbox. From this screen, you can move and delete the files using the Command Menu.

Using FFM Desktop: Client Folders

In your FFM Desktop Folders list, you can create and maintain folders for each client. Dropping published files into their folders means that those documents will appear in their "Documents" folder on-line.

When you add a new client to your account, FFM Desktop will automatically add the client to the folder list, under which you can create and maintain folders for documents.



Managing the Folders

Folders can be added beneath the client heading by right clicking on the client's name, highlighting "Add," and left clicking on "Folder." Clients should have a Public folder** and a Private folder. The Public folder contains a list of the files you have sent to all of your clients. The Private folder contains a list of the files you have sent only to that particular client. Dropping a file into the Private folder of a particular client and then publishing that file means that the file will appear in the client's document folder.

You can also email your clients to let them know about the new files you have placed in their folders.

Client Sharing

If you have shared your client with another Advisor via the Client Share Group option, the client's Public folder will contain all documents located in the Public folders of all the Advisors in the Client Share Group. Their Private folder will include all documents placed in that folder by any of the Advisors in the Client Share Group.

Should an Advisor leave the Client Share Group, the documents he or she placed in the client's Private folder will remain. The documents belonging to that Advisor that were previously in the client's Public folder will no longer appear in the client's Public folder.



How do I prevent my clients from editing the Word, PowerPoint or Excel documents I post for them?

All files placed in the Public folder are delivered as copies to your clients and appear in their Public folder. They have the ability to copy and make changes to these files, but the original (in your Public folder) will remain unchanged. When sending read-only copies of documents to other folders, Word, PowerPoint, and Excel files can be formatted as read-only and/or password protected.




The Public folder listed beneath each client's name is just a copy of your Public folder. You cannot place files in this folder. All Public files should be placed in your Public file. You will not be able to open the documents in the Document list for a client's Public folder.

Using FFM Desktop: Document List

The Document list, located to the right of the Folder list, is a list of the files within whichever folder you have opened. For instance, if you click on your Inbox folder, you will see a list similar to the following:

Inbox Documents:	
Name	Upload Date
 test2.doc	2/2/2001 1:50:57 PM
 test3.doc	2/2/2001 1:50:59 PM

Desktop View

Inbox Documents:			
	Document Name	Upload Date	Command Menu
	TEST99119911	3/12/2001 5:02:35 PM	▶ ✕
	test99999	3/12/2001 4:44:51 PM	▶ ✕
	TEST88888	3/12/2001 4:38:18 PM	▶ ✕

On-line View

Clicking on the folder icon will open the associated document list in the Document frame. From this list, you can click on the document name to open the document and view its contents. Unpublished files are marked in the document list with a red icon. Copies of files (such as those files located in your clients' Public folders) are marked with a yellow icon.



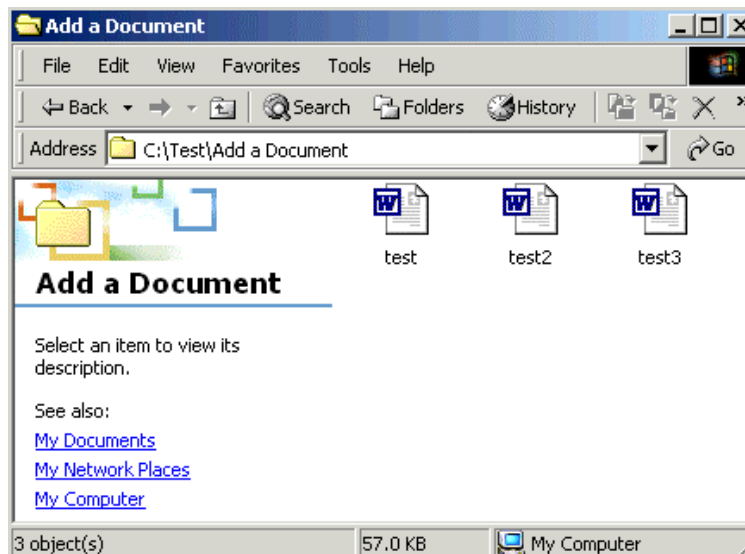
Using FFM Desktop: Adding Files

You can add files to a folder in two ways. The first way is by using the **Add a Document** window (pictured below). You can access this window by left-clicking on File in the top menu and clicking "New Document" or by right-clicking on the Document list, left clicking on "Add" and left-clicking on "Document". For more on how to add a file, see Tools.



You can also use the **drag and drop** feature. Simply open the file browser on your computer and drag the file you want to save over to FFM Desktop by left clicking on the file and moving the cursor over to the FFM Folder list without releasing the mouse button. "Drop" the file into the appropriate folder when the cursor highlights the folder name.

Once you have dropped the file into the folder, click on the folder name and the file should appear as an unpublished document in the Document list.



Using FFM Desktop: Tools

Top Menu Tools

To use the top menu, left-click on any of the items and you will see a drop down menu with selections. Those in black font are available options. Those in gray are disabled, possibly because you do not have a folder or file selected.

File

New Document

This will add a document. You can also add a document by using the right-click tool or clicking the Document button in the toolbar.



New Folder

This will add a folder. Be sure left-click once (this will also open the folder) on the folder or client heading beneath which you want the new folder to appear. For instance, in the image to the right, to add a folder beneath the Private folder for A Client, you should click on Inbox and then open the "File" menu. You can also right-click on a folder in order to add another folder beneath it. Or, you can click on the Folder button in the toolbar to add a folder beneath whatever folder you have selected.

Save Changes

This will publish a document. You can also publish a document by clicking the Save button in the toolbar.

Exit

This will close the program. You can also exit by clicking the button in the top right corner of the window.

Edit

Delete

This function will delete a selected file or folder. Before clicking delete, left-click on the file or folder and then open the "Edit" menu and click "Delete". You can also delete using the right-click tool or the Delete button option.

Rename

If you want to rename a file or folder, you can use this option. Clicking "Rename" will create a text box around the file or folder name, and you can edit or change it within the text box. Left-clicking on the changed name or pressing "Enter" on your keyboard will make the change permanent. You can also rename a file by right-clicking on it.

View

Refresh

After you have saved a new file or folder and want to see the new view of the Folder list, or "tree", click on "View" and then on "Refresh" to see the updated Folder list. You can also refresh the screen by clicking the Refresh button.

Toolbar

If you want to view or remove the view to the Toolbar, click "View". A checkmark beside the "Toolbar" option means that the toolbar will be visible. Clicking on "Toolbar" will remove the toolbar from view. You can make this option visible again, but clicking on "View" and "Toolbar" again to replace the checkmark beside the option.

Status Bar

To remove the Status Bar (shown below) from view, click on "View" and "Status Bar" to remove the checkbox from beside that option. You can make this option visible again, but clicking on "View" and "Status Bar" again to replace the checkmark beside the option.

Tools

Options

Clicking on "Tools" and then "Options" opens the screen enabling you to manage your "Email" options. From this screen, you can manage your email and choose what notifications you and your clients will receive when you use FFM Desktop. You can also access "Options" by clicking on the Options button in the toolbar or right-clicking and then clicking on "Options." For more information, [click here](#).

Help

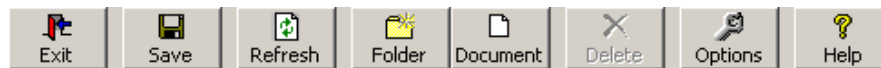
Contents

Clicking this option opens the Help function you are currently in. You can also access this function by clicking on the Help button in the toolbar.

About

Clicking "About" opens a window of publication information for FFM Desktop.

Toolbar



Exit

This will close FFM Desktop.

Save

This will publish your documents. You can also publish a document using the Top Menu option "File" and "Save Changes".

Refresh

If you rearrange files and folders, and then decide you would like them returned to the original order in which you had them at the beginning of your FFM session, click the Refresh button.

Folder

This will add a folder. Be sure left-click once (this will also open the folder) on the folder or client heading beneath which you want the new folder to appear. You can also right-click on a folder in order to add another folder beneath it. Or, you can click on "File" and then "Folder" in the top menu items.

Document

Clicking this button will add a document. You can also add a document by using the right-click tool or clicking "File" and "New Document" in the top menu items.

Delete

This button is enabled when you have clicked on a folder or file and will delete a selected file or folder. You can also delete using the right-click tool or by clicking "Edit" and "Delete" in the top menu.

Options

Clicking this button opens the screen enabling you to manage your "Email" options. From this window, you can manage your email and choose what notifications you and your clients will receive when you use FFM Desktop. You can also access "Options" by clicking on the "Tools" and "Options" in the top menu items or right-clicking and then clicking on "Options". For more information, [click here](#).

Help

Clicking the Help button opens the program you are currently using. You can also access Help using the top menu items.

Right-Click Tools



Add

Document

Right-clicking on a folder or document list will add a document. You can also add a document by using the Document button in the toolbar or clicking "File" and "New Document" in the top menu items.

Folder

This will add a folder. Be sure left-click once (this will also open the folder) on the folder or client heading beneath which you want the new folder to appear. You can also right-click on a folder in order to add another folder beneath it. Or, you can click on "File" and "Folder" in the top menu items.

Edit

Delete

When you have right-clicked on a folder or file, left-clicking on "Edit" and "Delete" will delete the selected file or folder. You can also delete using the Delete button in the toolbar tool or the by clicking "Edit" and "Delete" in the top menu items.

Rename

If you want to rename a file or folder, you can use this option. Right-click on the file or folder and then left-click on "Edit" and "Rename". This will create a text box around the file or folder name, and you can edit or change it within this text box. Left-clicking on the changed name or pressing "Enter" on your keyboard will make the change permanent. You can also rename a file by clicking on "Edit" and "Rename" in the top menu items.

Command Menu

The Command Menu is your menu of options in the on-line Document List. It includes "Move" and "Delete".



Move

Clicking "Move" allows you to move the document from one folder to another. When you click "Move", you will see a window containing your list of folders and clients. Clicking on a folder within this window sends the document automatically. When you move this document, a copy of it will not remain in the original folder.

Delete

Clicking "Delete" allows you to delete this file from the folder. You will get an "Are you sure?" window with the option to click "OK" or to "Cancel" the deletion.

Viewing Tools

Using these buttons, you can minimize the screen by left-hand button. Clicking the middle button will maximize the screen. Clicking the right-hand button will close the program. You can also close the program by clicking "File" and "Exit" in the top menu items.



Using FFM Desktop: Publishing Files

To designate which folder you want to have file published in, you can drag and drop the file between folders from your document list to your folder list or use the Add a Document window.

Unpublished files are marked in the document list with a red icon. Copies of files (such as those files located in your clients' Public folders) are marked with a yellow icon.



Unpublished



Published



Copy

Ready to Publish?

When you are ready to publish a file and pass it to your clients, you can follow one of two procedures:

1. Open the File menu, and click "Save". Your files will automatically be published to the folder in which they are located.



2. Click once on the Save button in the toolbar. This will automatically publish files in the folder you have designated.



Make sure that the file is in the folder to which you wish it to be published. Do not publish files in the Public folder if you do not want them to be received by all of your clients.

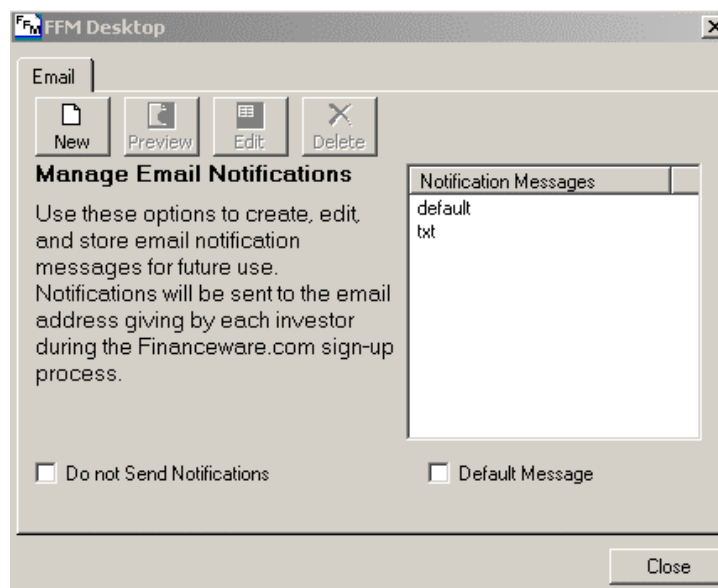
Using FFM Desktop: Email Notification

When you publish a document, you can notify your client(s) that the document has been placed in their Documents folder on-line. You can either send a formatted email with the same information each time, or create a new email each time you publish documents.

Options for Email Notification

Clicking on your "Options" tool will open your email options. The "Email" window allows you to create a new email to attach to a document you are about to publish, preview a saved email, edit a previously saved email, and delete a previously saved email. You can also choose to send no notifications.

You can also set one email as your default email by highlighting its name in the notification messages list and clicking the checkbox to "Set as Default" (this email can be sent every time you publish documents to let your client(s) know the document has been published). Clicking "Close" will close the Options window.



Manage Email Notifications

New

Clicking the "New" button will open an email window from which you can create a new email.

Preview

Clicking this button allows you to view a previously saved email. First, highlight the email you want to view in the email list in the white scroll box on the right side of the window, then click preview.

Edit

To edit an existing email, highlight the name of the email you want to edit and click "Edit". This will open the email in the window pictured below. You can edit the email and click "Save" to save it under the same name or change the name and click "Save" to save the new version as a separate email.

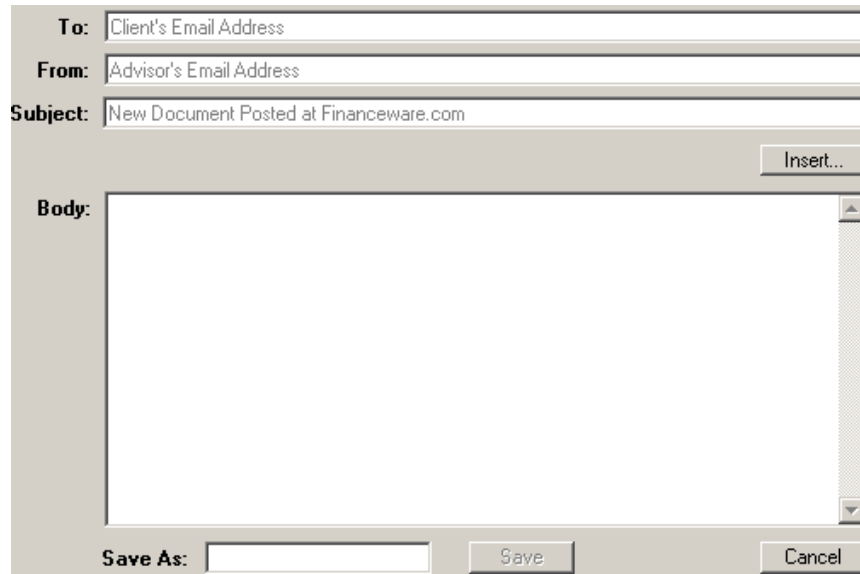
Delete

To delete an email, highlight the name of the email you wish to remove, and then click delete.

Creating a New Email

Clicking the "New" button will create a new email window. From this screen, you can create a new email to send to your client(s). The options provided for the email are listed below.

** The "To" and from "From" fields will automatically contain the client's address and your address. "Subject" will always be "New Document Posted at Financeware.com".



The screenshot shows a dialog box for creating a new email. It has three input fields at the top: 'To:' with the text 'Client's Email Address', 'From:' with 'Advisor's Email Address', and 'Subject:' with 'New Document Posted at Financeware.com'. Below these is a large text area labeled 'Body:' with a vertical scrollbar on the right. An 'Insert...' button is located to the right of the 'Body:' field. At the bottom of the dialog, there is a 'Save As:' field, a 'Save' button, and a 'Cancel' button.

Insert

Using the insert button, you can automatically enter the client's first and last names.

Save

After you type the email name into the "Save As" field, click Save, and the email will be saved under that name in your email list on the Options window.

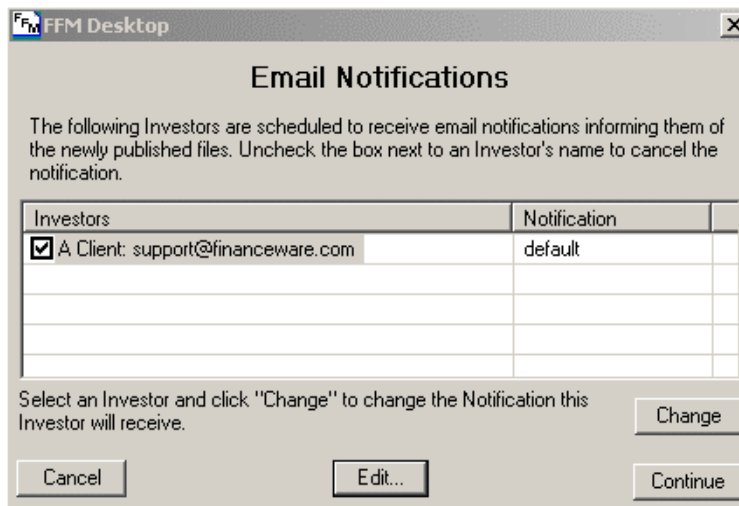
Cancel

If you decide not to save an email you have created, click "Cancel".

Sending an Email with a Document

You will receive a notification before an email is sent to your client(s) when you publish a document. From this notification, you have the option to edit the email by clicking "Edit" or to send, click "Continue".

Check the box next to all the clients who should receive the email. You may choose which of your saved emails they should receive using the drop-down box beneath the heading "Notification".



The screenshot shows a dialog box titled "Email Notifications" with a close button in the top right corner. The text inside reads: "The following Investors are scheduled to receive email notifications informing them of the newly published files. Uncheck the box next to an Investor's name to cancel the notification." Below this is a table with two columns: "Investors" and "Notification".

Investors	Notification
<input checked="" type="checkbox"/> A Client: support@financeware.com	default

Below the table, there is a note: "Select an Investor and click "Change" to change the Notification this Investor will receive." At the bottom of the dialog, there are four buttons: "Cancel", "Edit...", "Change", and "Continue".

Using FFM Desktop: Importable File Types

FFM Desktop can import many file types for viewing in their native formats, including .pdf files, Word, Word Perfect, etc. The program does not support .exe or .vbs files.

I often see .pdf files on the web. What are they and how do I produce them?

A .pdf file is a file saved in Adobe Acrobat format. Basically, these files are snapshots of a file in another format (i.e. Word or Excel). The .pdf format is most useful when you cannot be sure that the client will have the program required to view a certain file type. If your client does not have Acrobat Reader, however, they will have to obtain the free download before they can view the .pdf file.

If you attempt to import a file and have a problem with the format, please contact support.

Administration: Contact Support

If you need more assistance in using this product, please contact our support personnel by filling out the form found in our Support area. Someone will contact you either by email or phone (depending on which is your preference) as soon as possible.

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