Setup & Installation Guide

Welcome to PlanSeeGo, the easy to use budget management tool for you and your family. This Installation Guide provides step-by-step instructions for installing and activating the PlanSeeGo program on your computer.

Contents

Frequently Asked Setup and Installation Questions

System Requirements

To install and run PlanSeeGo, your computer must meet the following minimum requirements:

- 45 megabytes (MB) of available hard drive space

- Windows 10, Windows 8, Windows 7, Windows Vista, Windows XP, or Windows 2000

- A licensed version of Microsoft Excel ® 2007 or later (through Excel ® 2016)
  Note: *If you are using Excel ® 2007, SP2 is recommended. For more information on using PlanSeeGo with Excel ® 2007, see the **Frequently Asked Questions** section at the end of this document.*

- Any version of Adobe Acrobat Reader (required to view program documentation)

- An Internet connection (required for product activation)

Quick Start Guide

If you're eager to get started with PlanSeeGo and are familiar with software installation procedures, follow these steps to install the program. For more detailed installation instructions, see the following sections of this document.

1. The run the PlanSeeGo installer, double-click the PlanSeeGo installation file. You can also right-click the installation file and select the **Open** option.

2. Follow the setup wizard instructions to complete the installation.

3. Follow the screen prompts to create your first PlanSeeGo monthly budget.

4. The first time you open PlanSeeGo, the Product Trial Status window will display. Click the **Activate Now** button, and follow the screen prompts to activate your copy of PlanSeeGo.

   Note: You will need to purchase an Activation License from PlanSeeGo.com before you can activate your copy of the program.

Installing PlanSeeGo

The PlanSeeGo installation package file name ends with ".exe" and contains the version number of the PlanSeeGo program that you downloaded. For example, if the installation package is for version 1.3.64, build 17 of PlanSeeGo, the install file will be named **PlanSeeGo_v1.3.64.17.exe**.

> **Note:** To insure your protection and the authenticity of the installation package, the PlanSeeGo installation file is digitally signed by MyFutureIsUpToMe, LLC. For details on how to view the digital signature, consult the FAQ at the end of this document about verifying the authenticity of the PlanSeeGo install file.

The installation process is detailed on the next several pages. Depending on the speed of your computer the entire process should take no more than a few minutes.

1. Double-click the PlanSeeGo installation file.

2. Click the **Yes** button to start the installation:
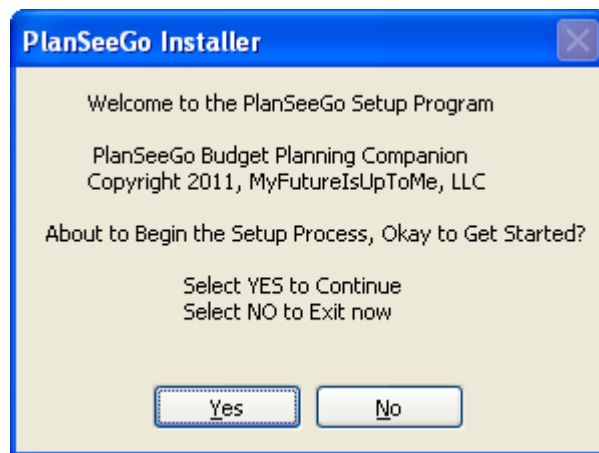
3. The WinZip Self-Extractor window shown below will display briefly and close by itself:
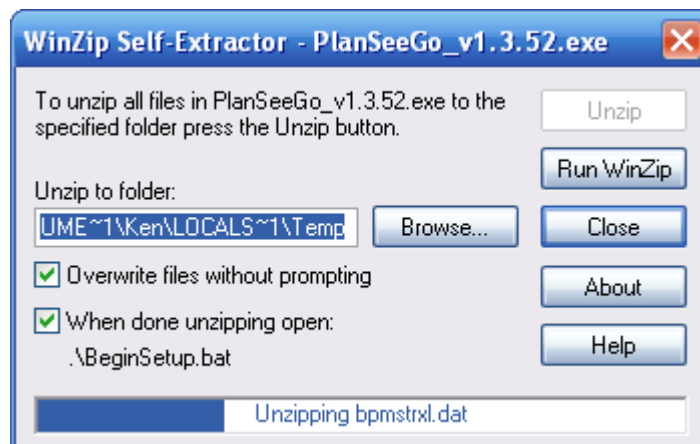
4. The PlanSeeGo End User License Agreement window will display. After reviewing the license agreement, select the option to **accept the terms of the License Agreement** and click the **Next** button:
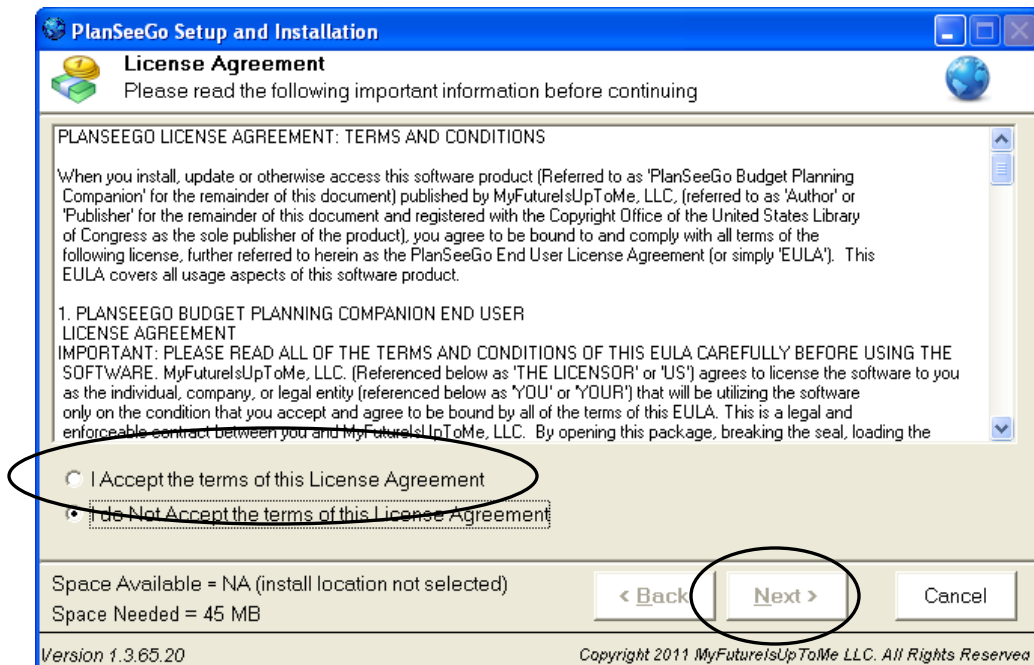
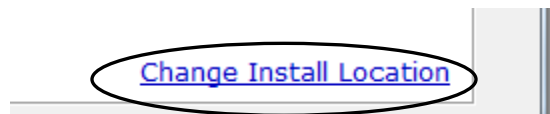5. The Select Install Location window will display:
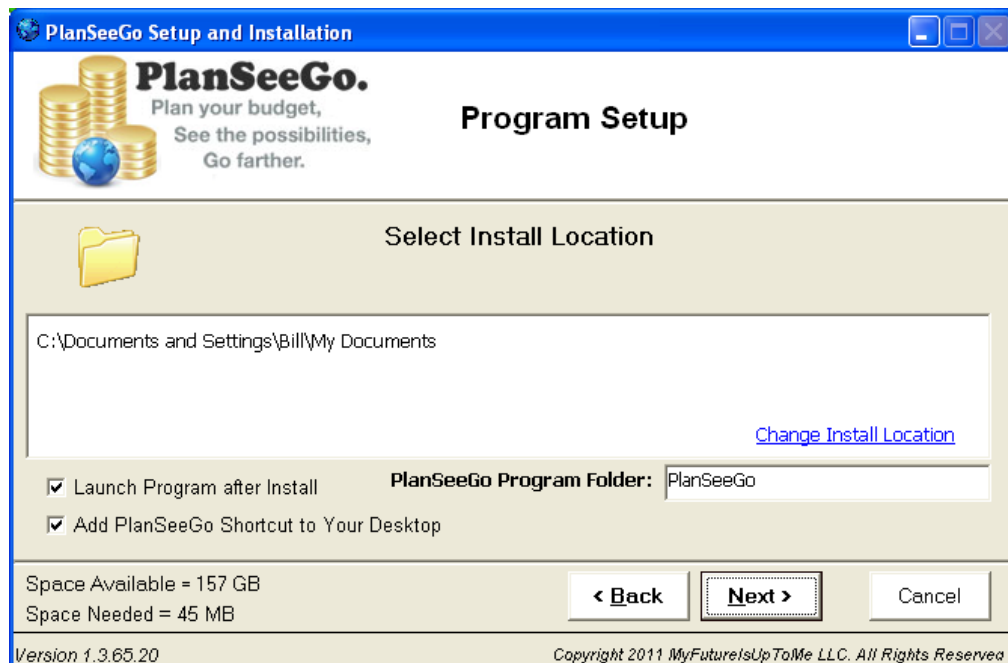
On this window you can select the location where you want the PlanSeeGo program to be installed on your computer. The name of the folder to contain your PlanSeeGo program files can also be specified. You can you choose to accept the default choices presented or make different choices.

Selecting the program folder location

5A. When this window is first opened, the box in the middle of the window shows the default install location of the PlanSeeGo program folder. The default location will vary depending on the version of Microsoft Windows you are running.

If you want to install PlanSeeGo in the default location, skip to step 5B below.

If you want to select a different location for your PlanSeeGo program folder, click the Change Install Location link:


The Specify Install Location window will display. Navigate to the location where you would like to install the PlanSeeGo program folder, and click the **Select** button.

> **Note:** After you install PlanSeeGo, do *not* move the program folder, or move the files in the program folder to a different folder. When you start PlanSeeGo, the program will always look for its program files in the folder you select in this step. If you need to move the program folder to a different location or another computer, follow the instructions in the **Moving or copying your PlanSeeGo program files** section of this document.

Naming the program folder

5B. The **Planner Folder** field shows the name of the folder that will contain your PlanSeeGo program files. The default name of this folder will be **PlanSeeGo**:
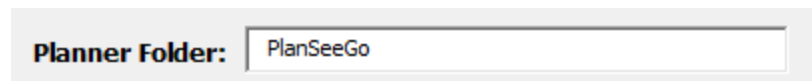
If you want to use a different name, change the text in the **Planner Folder** field to what ever program folder name you would like to use.
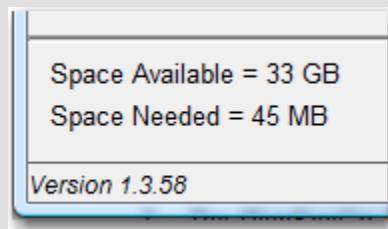
5C. When you have finished reviewing and making selections in the Select Installation Location window, click the **Next** button to proceed with the installation:
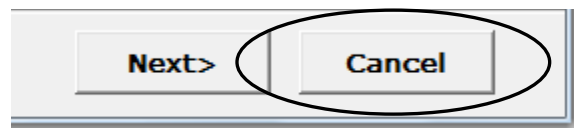
6. After the setup process is complete, the Setup and Installation window will give you the option to create a PlanSeeGo shortcut on your desktop and start the PlanSeeGo program. Click the **Finish** button to close the installer.


> **Note:** If you receive a warning message that you do not have enough disk space to install PlanSeeGo, look at the lower left section of the PlanSeeGo Setup and Installation window. This section shows how much disk space is available for the program folder you selected in the previous step, as well as how much space is required for PlanSeeGo:
>
>
>
> If you do not have enough disk space to install PlanSeeGo, click the **Back** button to return to the Select Install Location window, and then select a location that has enough available disk space.

7. When the PlanSeeGo program starts, the Trial Status window will display and report the status of your Free Trial.
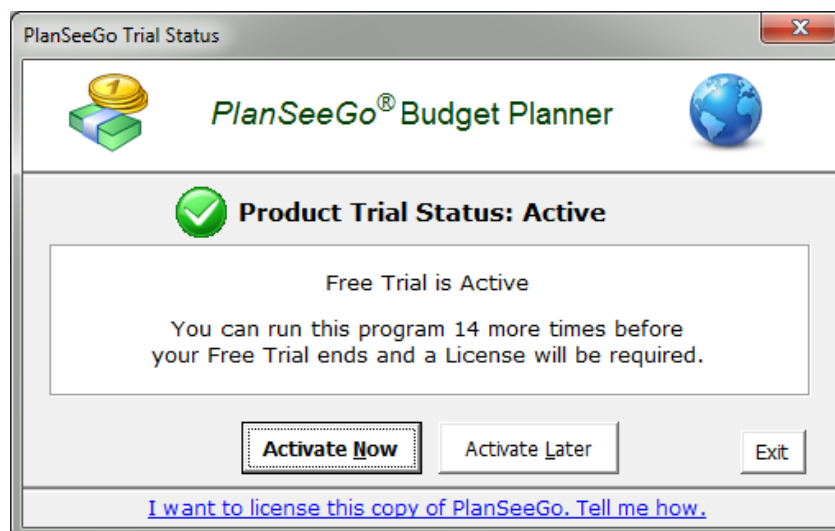
You can now:

- Activate PlanSeeGo by clicking the **Activate Now** button. See the **Activating PlanSeeGo** section of this document for more information.

- Skip activation for now and put PlanSeeGo through its paces during the Free Trial. Do this by clicking the **Activate Later** button. See the **Creating your first PlanSeeGo budget** section of this document for more information.

- Close PlanSeeGo by clicking the **Exit** button.

If you choose to activate later and run the program, the PlanSeeGo Product Information window will display.
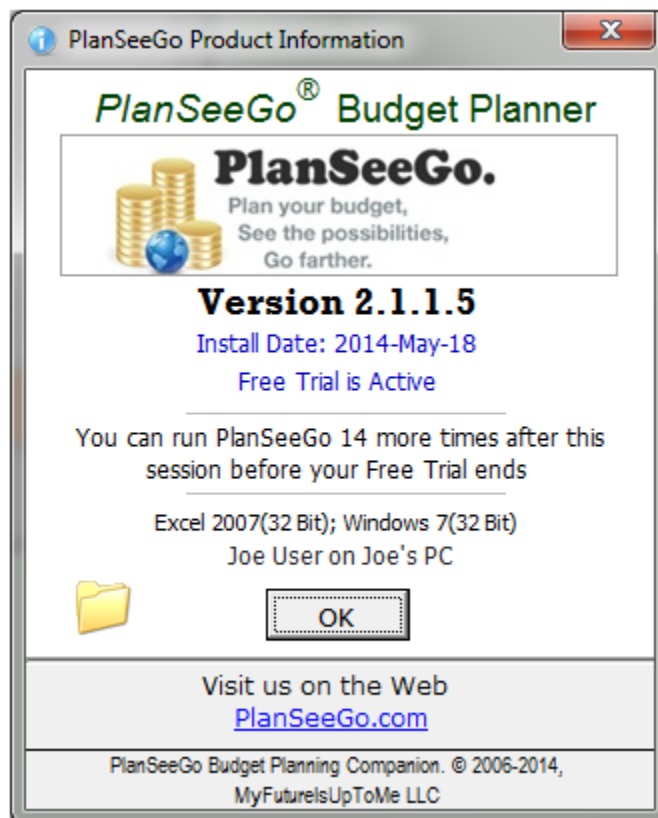
Activating PlanSeeGo

The PlanSeeGo Trial Status window will display each time you open PlanSeeGo until you purchase a product license and activate the program.

> **Note:** You can always skip the PlanSeeGo Trial Status window by clicking the **Activate Later** button. The free trial version of PlanSeeGo will allow you to run the program 15 times with access to most features of the program*. After your fifteenth run of PlanSeeGo, it will open in limited functionality mode unless you buy a license and activate it. While in limited functionality mode you can view all budget plans you've created but will not be able to create new budget plans or save new changes to your existing budget plans.
>
> **Backup, import, and data export features are not available in the Trial version*

The process to activate your copy of PlanSeeGo takes only a few minutes depending on the speed of your computer and Internet connection. After buying a license from the PlanSeeGo.com website, follow these simple steps to complete the activation process.

1. In the PlanSeeGo Product Activation window, click the **Activate Now** button.

   Or, if you selected the **Activate Later** option when starting PlanSeeGo and are already running the program, select the **Activate Product** option from Console tab of the PlanSeeGo console.

Select the Activate Product command in the Ribbon
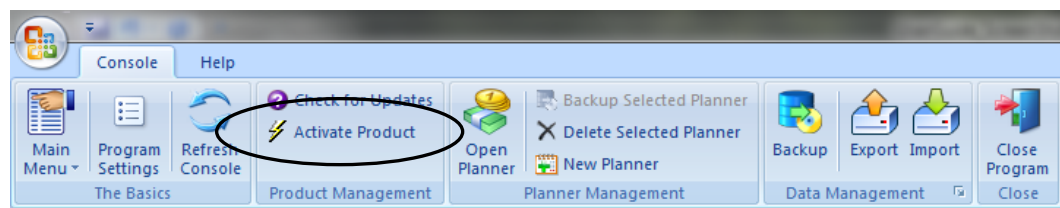
The PlanSeeGo Activation Credentials window will display. The activation window will walk you through a simple set of 1-2-3 activation steps as shown in the following illustrations:

When you purchase PlanSeeGo from the PlanSeeGo.com website, you receive an Order Confirmation email that contains an Order Number and Product Key. Enter this information, along with your first and last name from the Order Confirmation, in the PlanSeeGo Activation Credentials window as shown below. When all order details have been entered, a green check mark will appear in the progress header at the top of the window and inside the Order Details section. This signifies you can move on to the next step in the process.

2. After entering your Order Details, click the **Get Activation Code** button to retrieve the Activation code that will activate this installed copy of PlanSeeGo.

The PlanSeeGo Activation Credentials window is shown below with an example of how it will look after valid Order Details have been entered:


After clicking the **Get Activation Code** button, a web page will open containing your Activation Key. You must have an internet connection to complete this step.

Enter the Activation Key from PlanSeeGo.com in the PlanSeeGo Activation Credentials window. It's kind of a long string of numbers and letters so to make things a bit easier click the Copy activation key to clipboard link under the Activation Key as shown above. You can then easily paste the key into the Activation Window as shown in the next step.

3. In the PlanSeeGo Activation Credentials window, enter your Activation Key into the **Activation Code** field. If you have clicked the Copy activation key to clipboard link in the previous step, you can paste the key into the window by clicking the Paste Activation Code from Clipboard link:
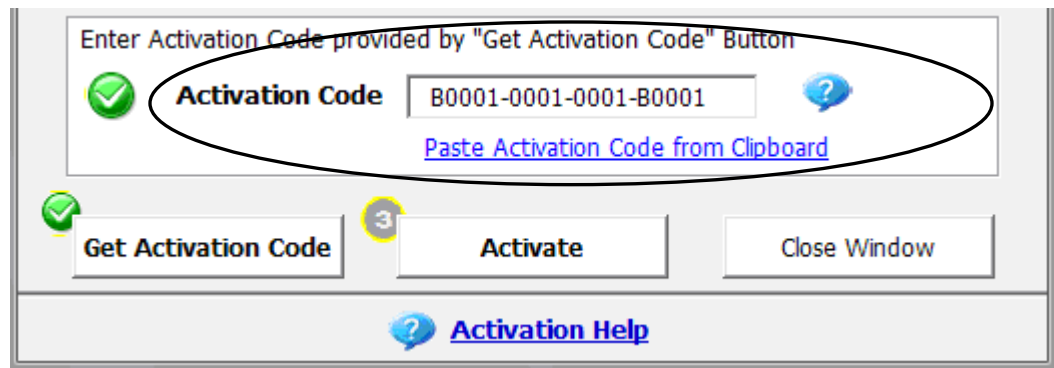
That's all there is to it. Now just click the **Activate** button and the Activation Complete window should display. Click **OK** to continue and you're all set, your copy of PlanSeeGo has been activated. Your PlanSeeGo license will allow you to install and activate the program on up to three computers. Should you wish to activate another copy under this same license, install the software and follow these same steps.
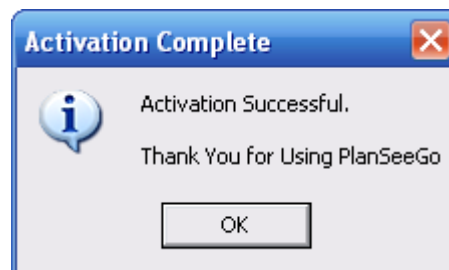
After you activate PlanSeeGo, you will receive a one-year product subscription which will allow you to download and apply software updates for free for a full year.

If you have not created any budget plans, you will be prompted to create your first budget plan. Go to the **Creating your first PlanSeeGo budget** section of this document or consult the PlanSeeGo User Guide for more information.

If you are not able to retrieve your Activation Code or successfully activate PlanSeeGo, Please verify you have entered your Order Details correctly and your connection to the Internet is working. If you are still having problems, send an email to ActivationHelp@PlanSeeGo.com. Please be sure to provide your order details as well as the email address on file in your PlanSeeGo.com profile so we may assist you.

Creating your first PlanSeeGo budget

When you open PlanSeeGo for the first time, you will be invited to create your first budget:
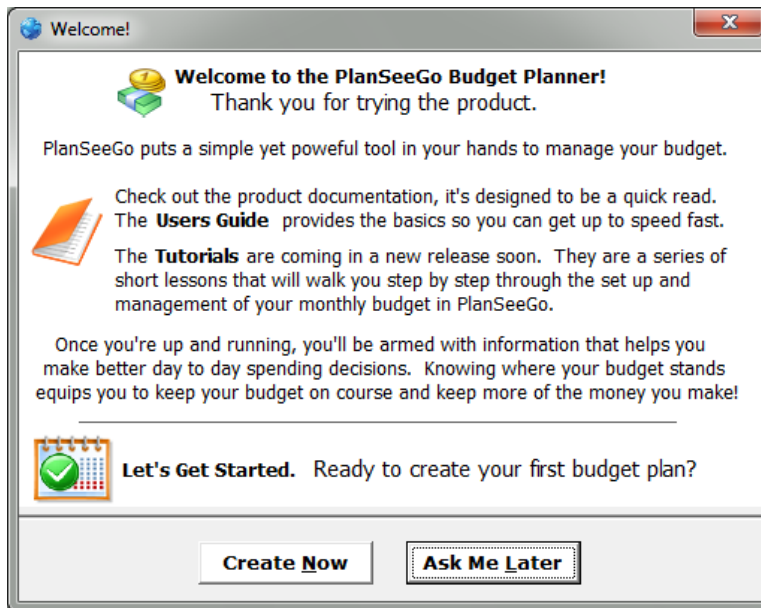
> **Note:** You can choose to skip this step by clicking the **Ask Me Later** button.
> Instructions for creating your first budget plan can be found in the Product
> Introduction Guide and the User Guide.

There are just a few simple steps to follow to create your first budget. Depending on the speed of your computer, the entire process should take no more than a few minutes.

1. Click the **Create Now** button. The **Create New Budget Planner** window will display:
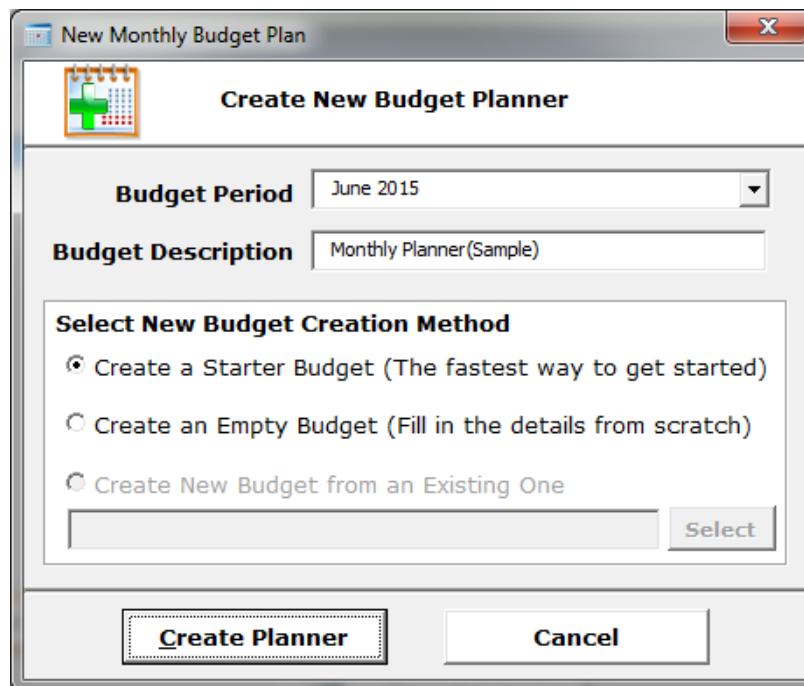
2. Review or change the selection in the **Budget Period** field. To create a budget for the current month, leave the selection in this field unchanged. To create a budget for a different month, click the down arrow to the right of this field. The current month, the three months prior, and the next three months will display in a list:
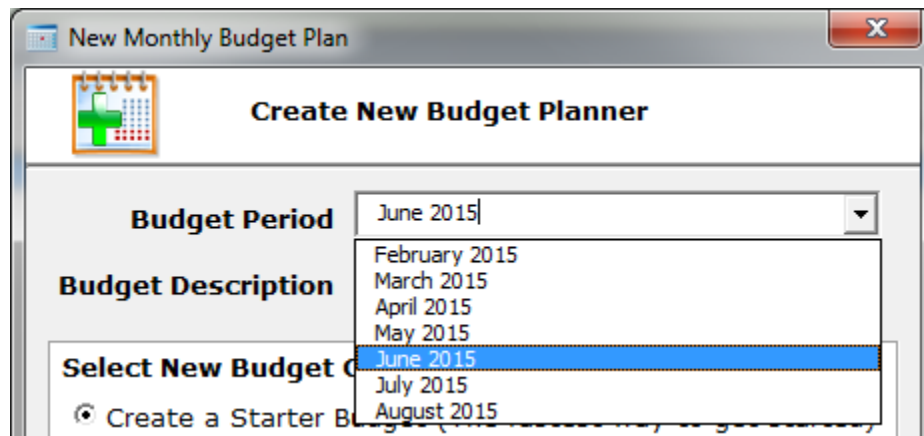
Select the desired month from this list.

3. Beneath the Budget Period field, select the option for the type of budget you wish to create:

    *   If you want to create a starter budget, select the **Create a Starter Budget** option:
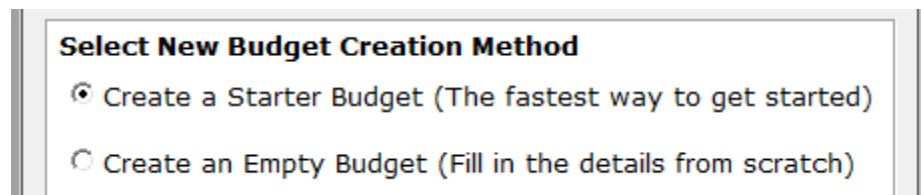
    *   If you want to create a budget plan with no data, select the **Create an Empty Budget** option:
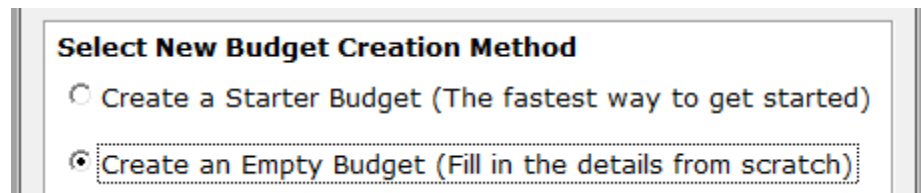
4. Click the **Create Planner** button:
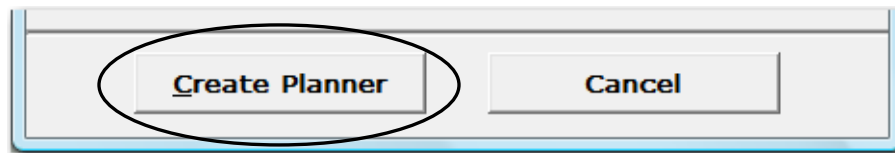
5. After a few moments, a confirmation window will display. Click **OK** to proceed:
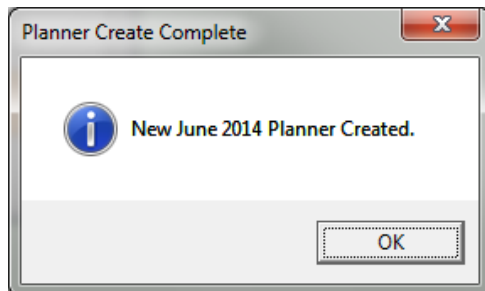
6. The PlanSeeGo Console window will display, with the PlanSeeGo budget you just created listed:
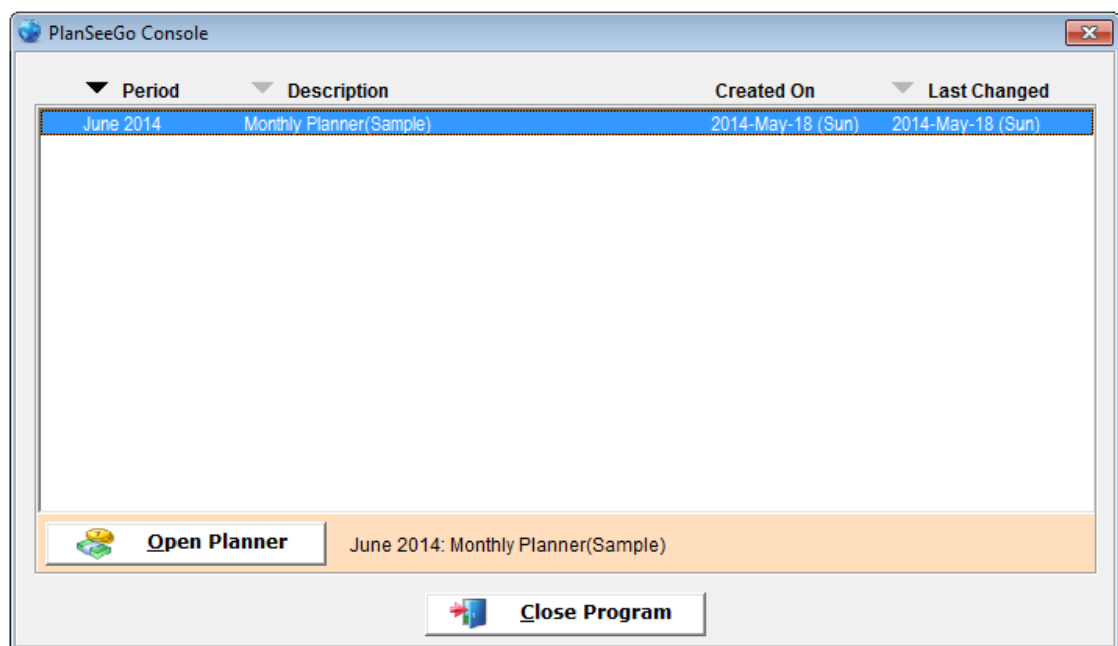
Select the monthly budget you created and click the **Open Planner** button to proceed:
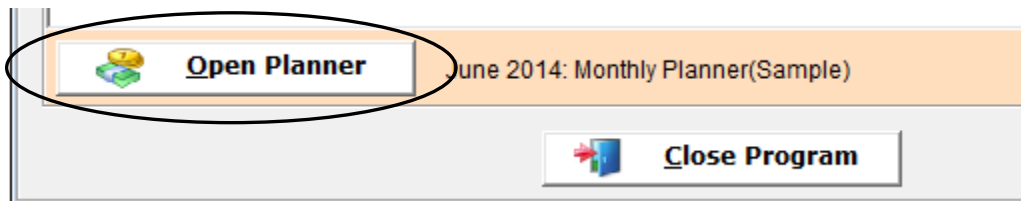
As soon as you select the monthly budget you created and click the **Open Planner** button, you will receive an information message as shown below:
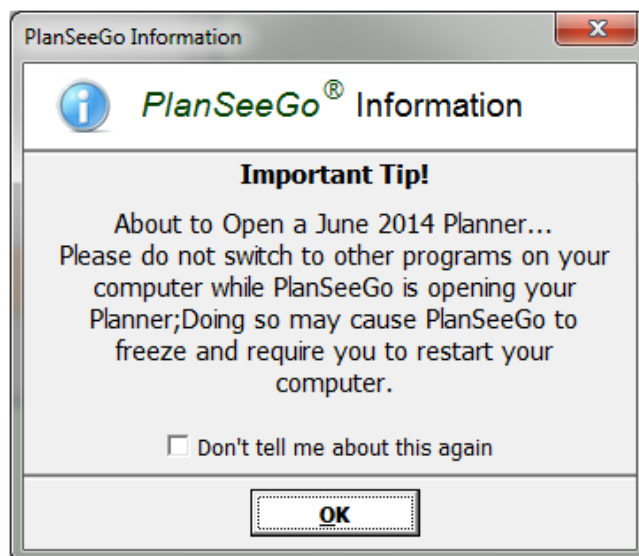
Please pay attention to this tip! Do not switch to other programs that are running on your computer while PlanSeeGo opens your budget. Due to the nature of how PlanSeeGo and Excel interact, your PlanSeeGo session may freeze and you'll need to restart your computer to continue running the PlanSeeGo program.

7. PlanSeeGo will then go about a number of tasks as it prepares your budget for use. When PlanSeeGo is finished, the window shown below will display. Click **OK** to proceed.
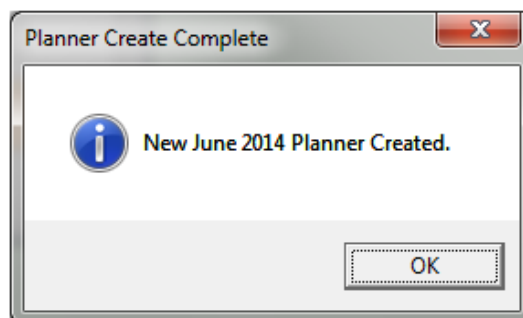
8. The "About This Planner" window will then be displayed. Click **OK** to proceed:
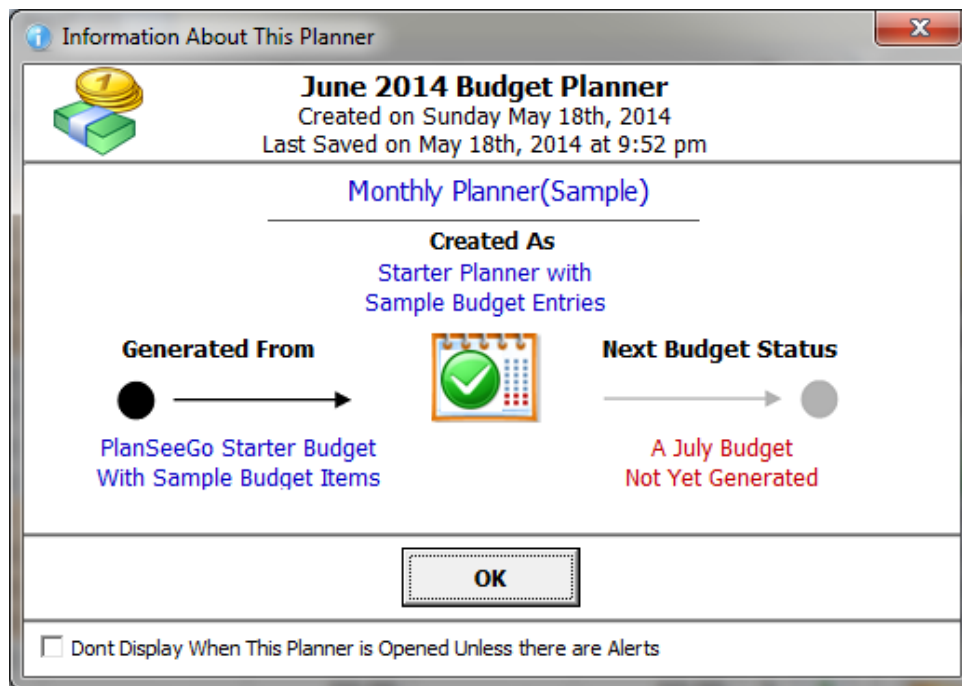
Congratulations! Your first PlanSeeGo budget is ready for use.

Page Size Adjustments and Zoom Settings

Note: When any of the pages in your first PlanSeeGo planner are displayed for the fist time, a message box like the one below will display. It allows you to decide how big or small you want each page to be displayed. Once you select a zoom setting for a page, it applies to all of your planners and PlanSeeGo won't ask you again.
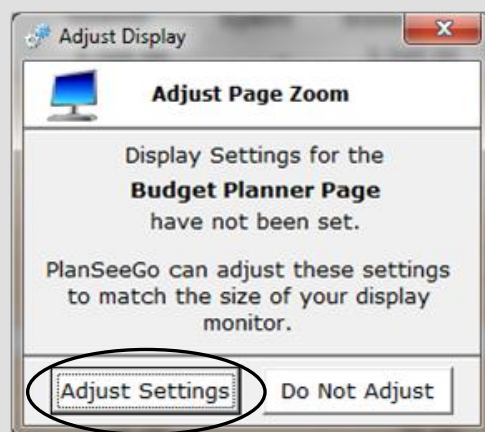
Clicking the Adjust Settings button will display the window shown at the top of this page. After you set the display settings for a page once, PlanSeeGo remembers that setting across ALL planners.

You can manually adjust zoom settings at any time by selecting the **Zoom** icon from the PlanSeeGo command ribbon:
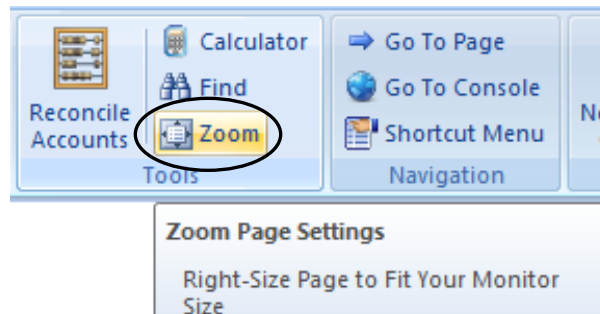
This will allow you to refine the zoom setting for any one of the pages of your budget planner. If the 'Remember Zoom Settings for This Window' option is specified when you click the Close button, your new zoom setting will apply to that page on ALL planners you open in the future.
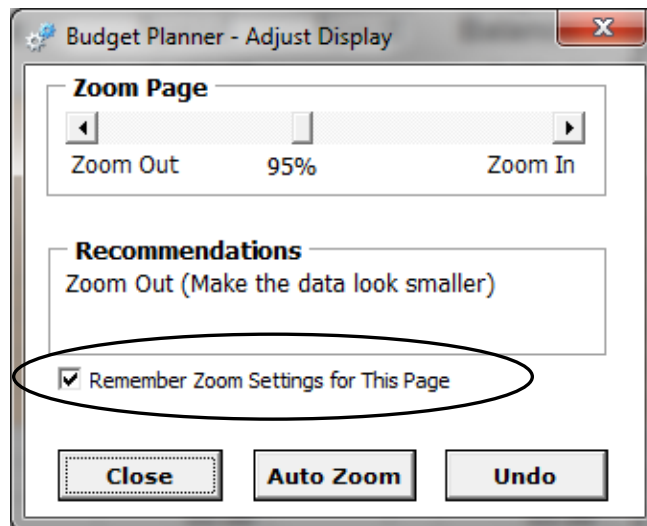
Activation Prompts

If you have not already activated your installation of PlanSeeGo, you will be prompted to activate the each time you open the program. See the **Activating PlanSeeGo** section of this document for more information.

Maintaining PlanSeeGo

After you have installed and activated PlanSeeGo, you will occasionally need to perform some or all of the following maintenance actions:

- Renew your PlanSeeGo subscription

- Back up your PlanSeeGo program files

- Move or copy your PlanSeeGo program files

- Uninstall PlanSeeGo

The following sections describe how to perform each of these actions.

Renewing your PlanSeeGo subscription

After you activate PlanSeeGo, you will receive a one-year product subscription, which will allow you to download and apply software updates for free from PlanSeeGo.com.

Thirty days before your subscription expires, a reminder window will display when you open the program. If your subscription expires, you will no longer be able to download and apply software updates, or access the subscriber customer support knowledge base on PlanSeeGo.com.

You can purchase a renewal subscription by clicking the **Renew Now** link in the reminder window, which will open your web browser and direct you to the subscription renewal page on PlanSeeGo.com. After you purchase a subscription renewal, follow these steps to apply your renewal to your installed copy of PlanSeeGo:

1. Purchase a subscription renewal from PlanSeeGo.com. You will receive a new order number and product key with your renewal.

2. From the Console window, open the PlanSeeGo Subscription Renewal window:

   - Click **Renew Subscription** in the Ribbon
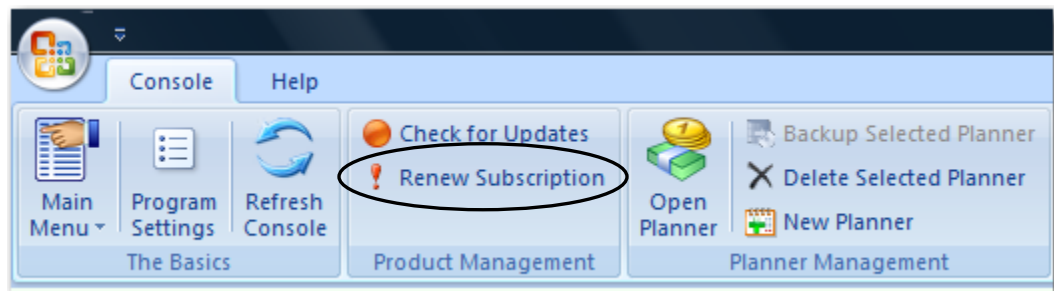
3. The PlanSeeGo Subscription Renewal Credentials window will display. Follow the same instructions described in the earlier section titled **Activating PlanSeeGo**.

   After you renew your one-year subscription, you can continue to download and apply free PlanSeeGo program updates from PlanSeeGo.com.

Backing up your PlanSeeGo planner files

Follow these steps to create a backup copy of your PlanSeeGo planner data files.

1. Open the Console window.

2. Then Select the **Main Menu** icon in the Ribbon, then go to **Program and Data Management > Data Backup**:
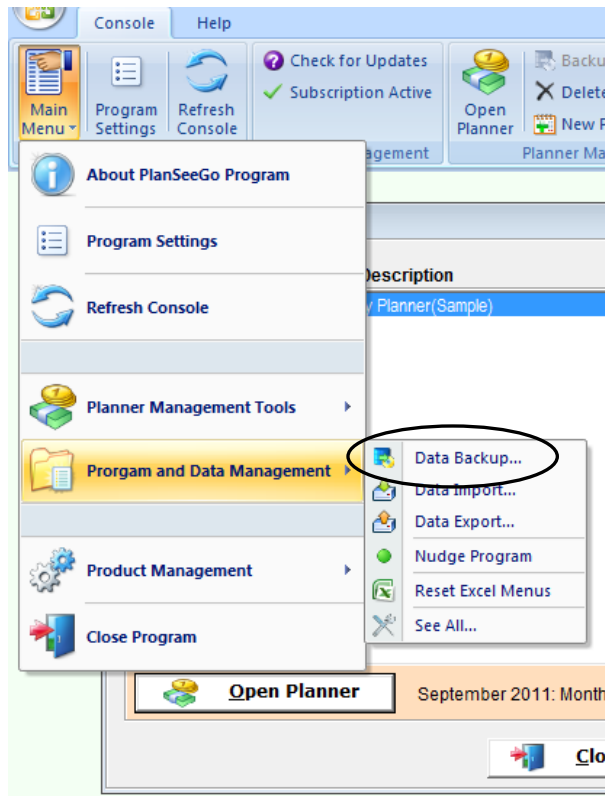
3. The PlanSeeGo Data Backup Manager window will display:
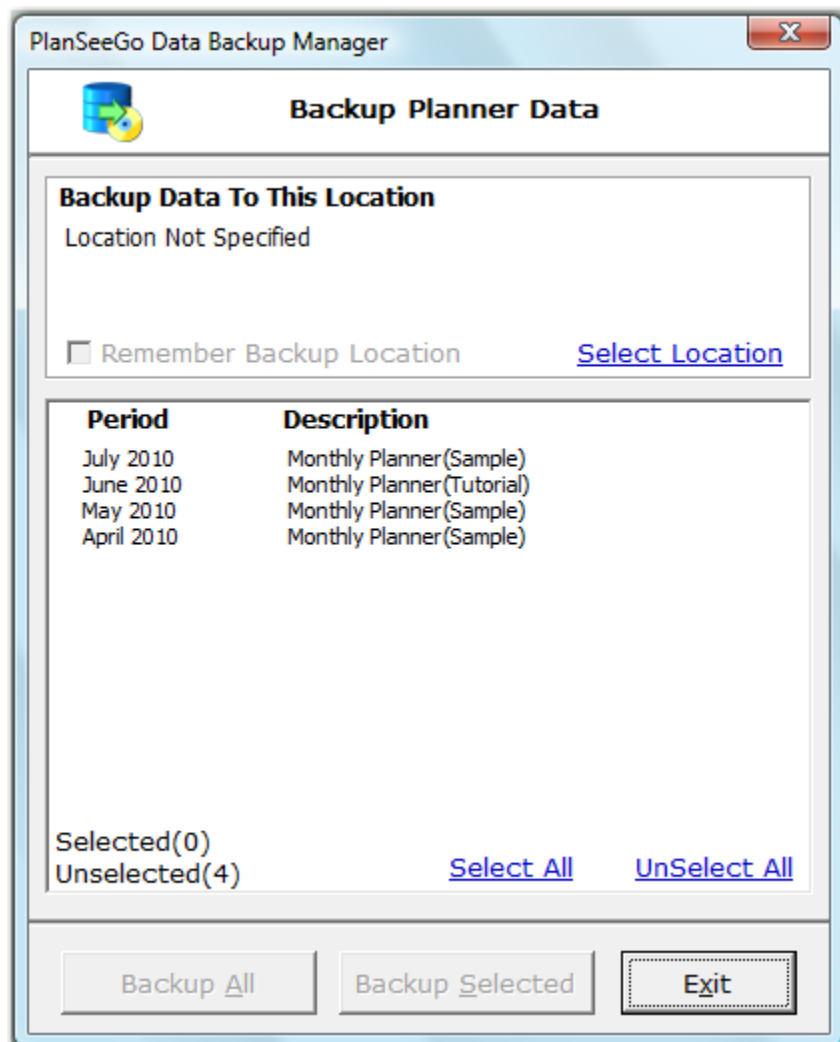
You will make two decisions in this window:

- Where you will save your backup planner data files
- Which planner data files you will back up

4. In the upper section of this window, click the Select Location link:

5. The Specify Backup Location window displays. Navigate to the folder where you will save your backup files, and click **OK**.

6. A list of your budget planner files will display in the lower section of this window. You must select at least one budget planner file to proceed.

    To back up all of your budget planner files, click the **Backup All** button:
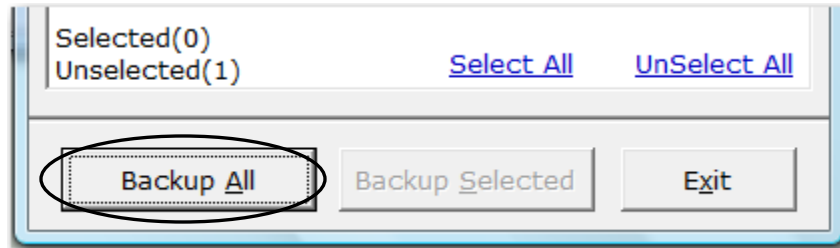
    To select only some of your budget planner files, use either of the following methods:

    - Hold down the CTRL key on your keyboard and select each of the budget planner files to be backed up with your mouse pointer.
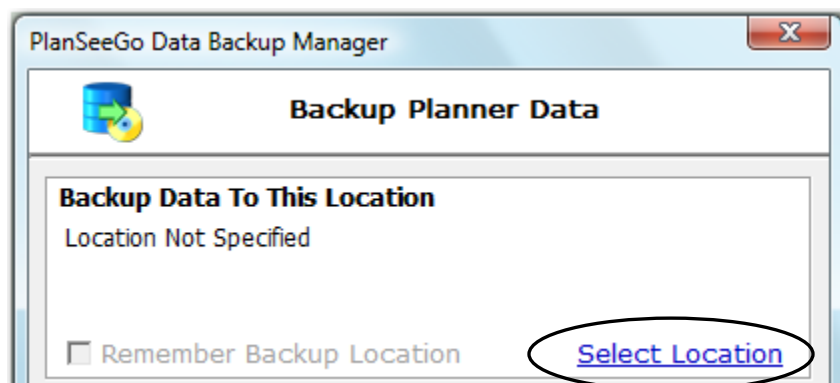
    - Click the Select All link:
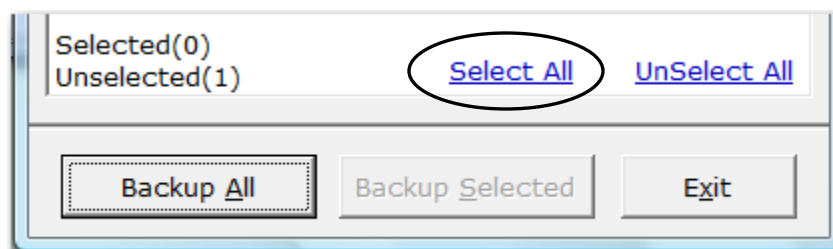
    All budget plans in the window will be highlighted. To remove a budget planner file from the select list, hold down the CTRL key on the keyboard and select the budget planner file(s) that are not to be backed up with your mouse pointer.

    When finished selecting budget planner files, click the **Backup Selected** button:
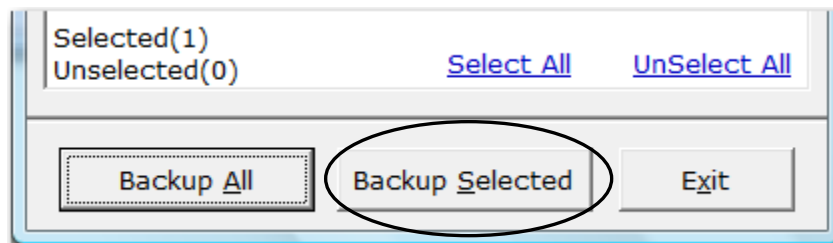
7. Click **Yes** when the confirmation window displays:

Backup Message

? About to Backup Selected Planners.

Okay to Continue?

Yes   No
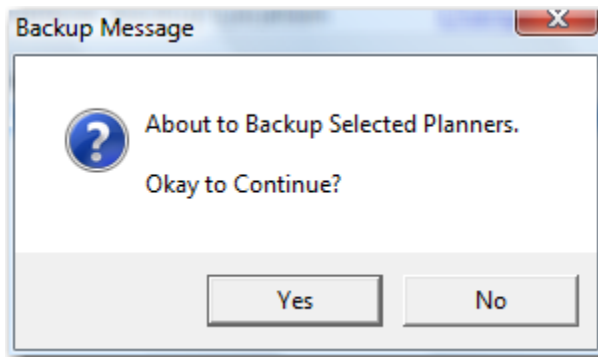
8. Click **OK** when the results window displays:
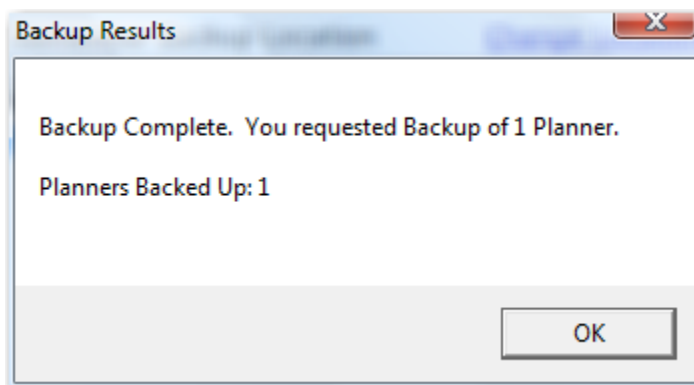
Backup Results

Backup Complete. You requested Backup of 1 Planner.

Planners Backed Up: 1

OK

9. The PlanSeeGo Data Backup Manager window will display again. Click **Exit** to close the window:

Selected(1)
Unselected(0)   Select All   UnSelect All

Backup All   Backup Selected   Exit
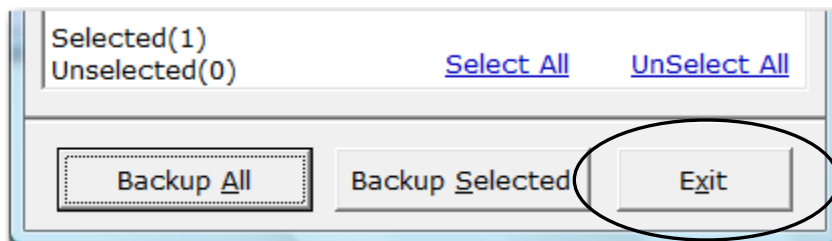
Exporting your PlanSeeGo planner files

When you installed PlanSeeGo, you specified a program folder location. If you want to export your PlanSeeGo planner files so they can be used by a copy of PlanSeeGo installed in a different location or on a different computer, follow the procedures in this section.

> **Note:**   When you start PlanSeeGo, the program will always look for its program and data files in the folder you specified during installation. The Data Export function of PlanSeeGo is intended to export planner data files only. If you move the program's installation folder to a different location, PlanSeeGo will *no longer operate*.

1. Open the Console window.

2. Select the **Main Menu** icon in the Ribbon, then go to **Program and Data Management > Data Export**:
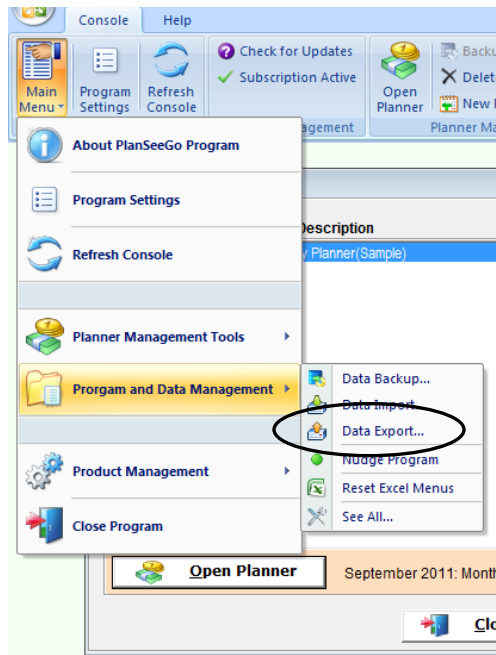
3. The PlanSeeGo Data Export Manager window will display:
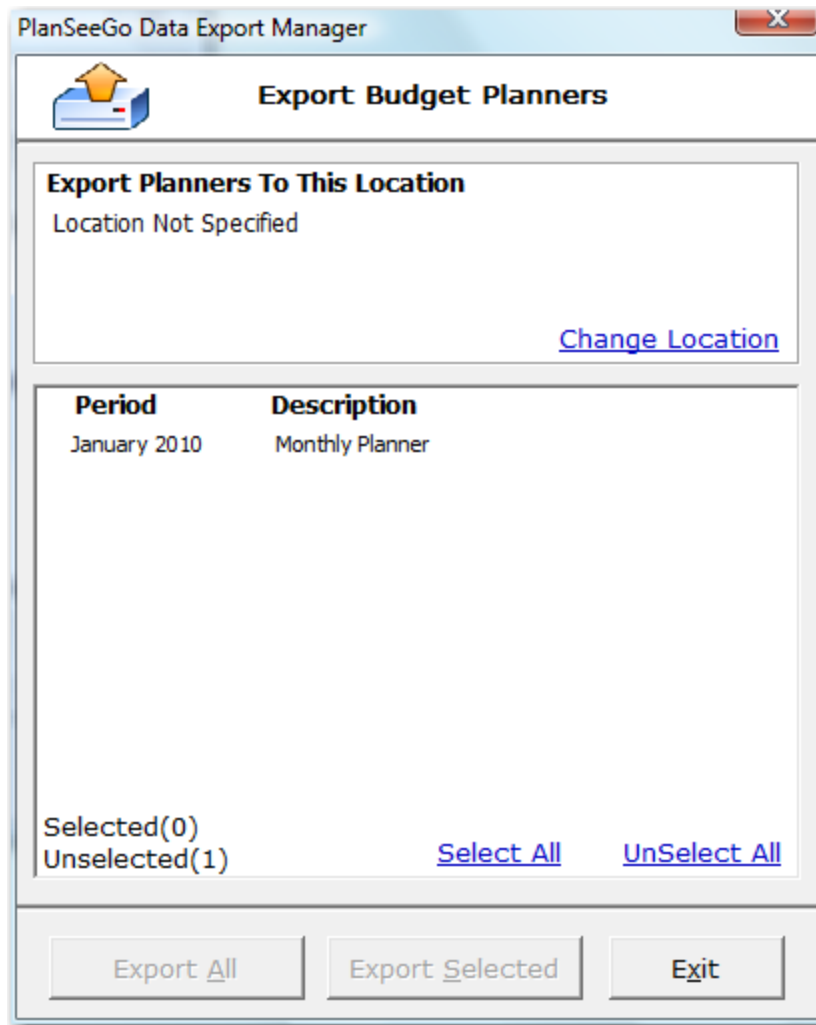
You will make two decisions in this window:

- Where you will export your budget planner files
- Which budget planner files you will export

4. In the upper section of this window, click the Change Location link:
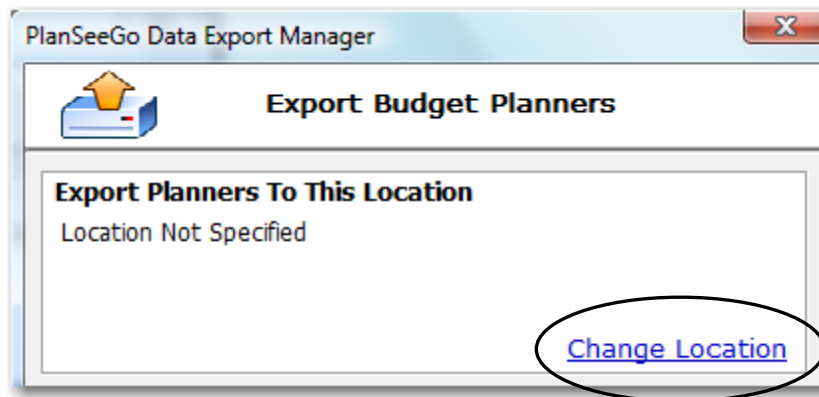
5. The Specify Export Location window displays. Navigate to the folder where you will export your budget planner files, and click **OK**.

6. A list of your budget planner files will display in the lower section of this window. You must select at least one budget planner file to proceed.

   To export all of your budget plans, click the **Export All** button:
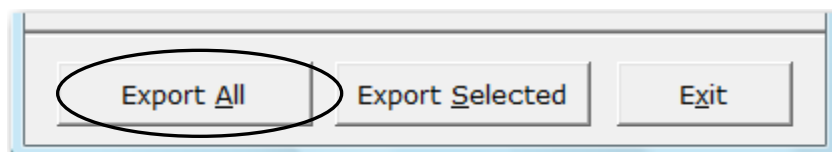
   To select only some of your budget planner files for exporting, use either of the following methods:

   - Hold down the CTRL key on your keyboard, and select each of the budget planner files to be exported with your mouse pointer.

   - Click the Select All link:
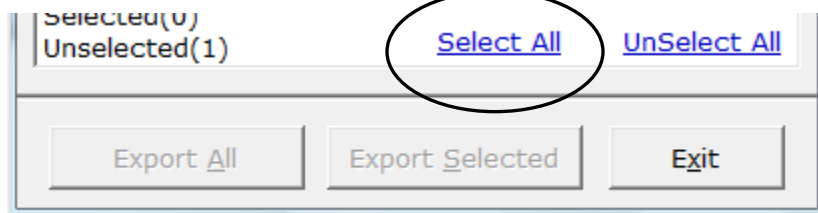
   All budget planner files in the window will be highlighted. To remove a budget planner file from the export list, hold down the CTRL key on the keyboard and select the budget planner file(s) that are not to be exported with your mouse pointer.

   When finished selecting budget planner files to be exported, click the **Export Selected** button:
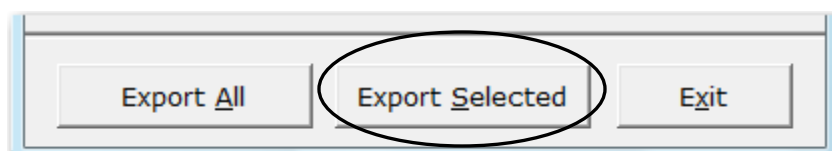
7. Click the **Yes** button when the confirmation window displays:

8. When the export process is complete, the results window will display. Click the **OK** button to continue:
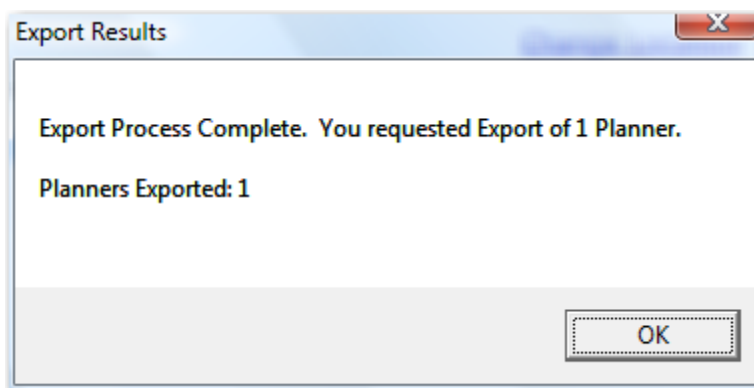
9. The PlanSeeGo Data Export Manager window will display again. Click **Exit** to close the window:

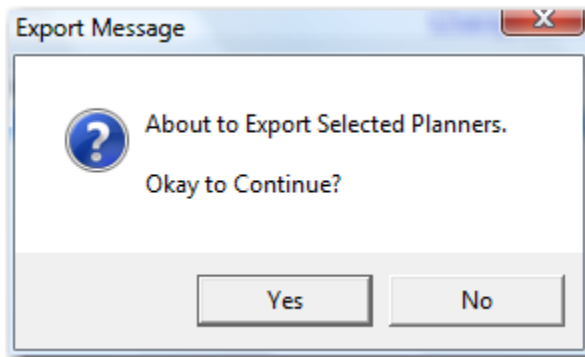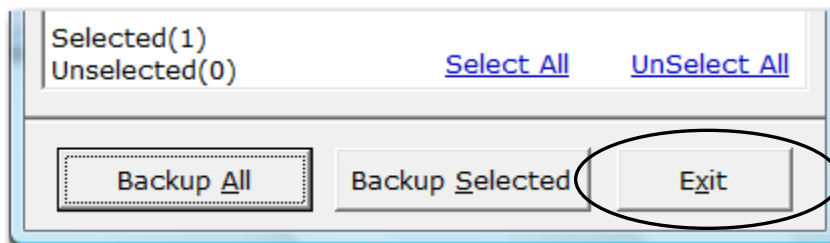| **Note:**	After you have exported or backed up your planner data files, you may safely uninstall PlanSeeGo without losing your monthly budget planners.
	For instructions on uninstalling PlanSeeGo go to the Uninstalling PlanSeeGo section of this document. If you are installing PlanSeeGo in a different location or on a different computer, you may import the planner data files saved using the Data Export or Data Backup functions. See the Importing your PlanSeeGo planner files section for instructions on how to import planner data files into a different installation of PlanSeeGo.

Importing your PlanSeeGo planner files

If you want to import PlanSeeGo planner files previously backed up or exported from a different location or computer, follow the procedures in this section.

1. Select the **Main Menu** icon in the Ribbon, then go to **Program and Data Management > Data Import**:
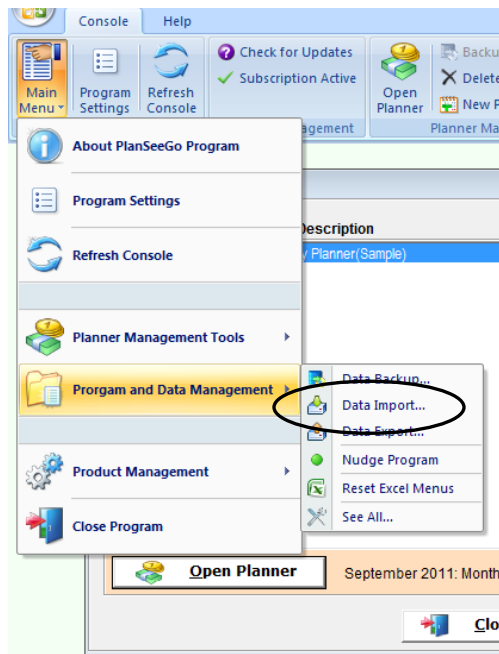
2. The PlanSeeGo Data Import Manager window displays:
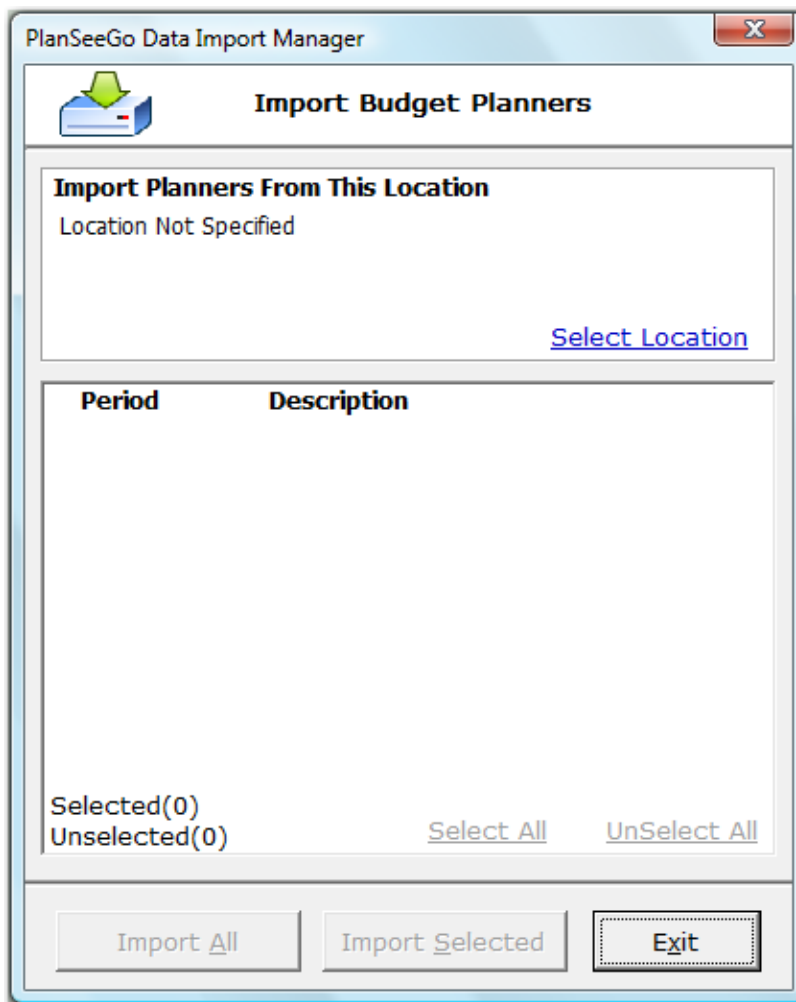
You will make two decisions in this window:

- The location of the budget planner files you want to import
- Which budget planner files you will import

3. In the upper section of this window, click the Select Location link:

4. The Specify Import Location window displays. Navigate to the folder where you saved your budget planner files, and click **OK**.

5. A list of the budget planner files in the import folder you selected will then display in the lower section of the window. You must select at least one budget planner file to proceed.

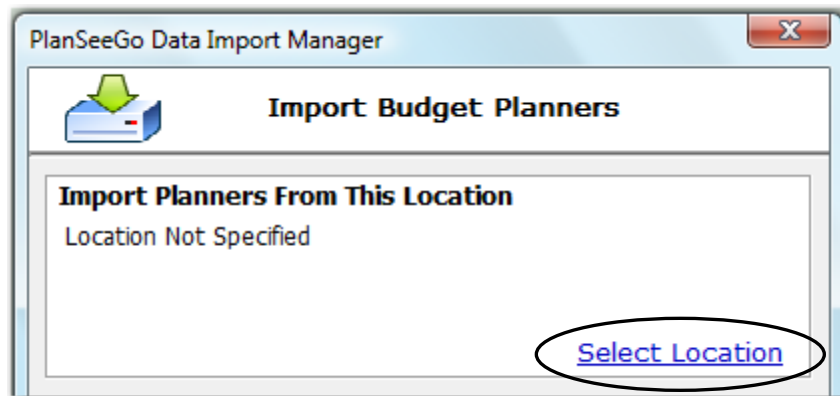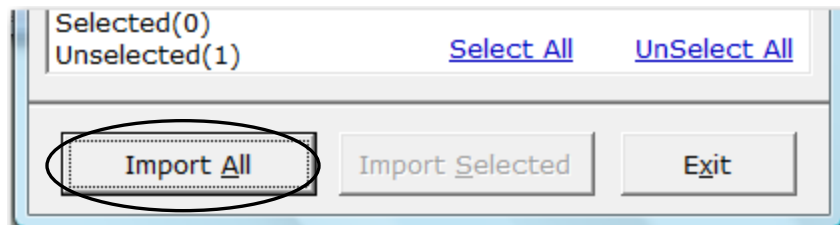   To import all of the budget plans, click the **Import All** button:

   To select only some of the budget planner file for importing, use either of the following methods:

   - Hold down the CTRL key on your keyboard, and select each of the budget planner files to be imported with your mouse pointer.

   - Click the Select All link:
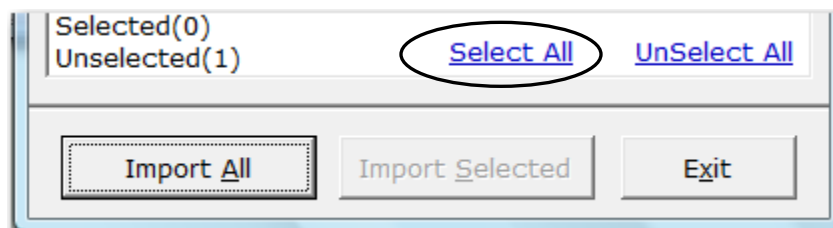
   All budget plans in the window will be highlighted. To remove a budget planner file from the import list, hold down the CTRL key on the keyboard and select the budget planner file(s) that are not to be imported with your mouse pointer.

   When finished selecting budget planner files to be imported, click the **Import Selected** button:
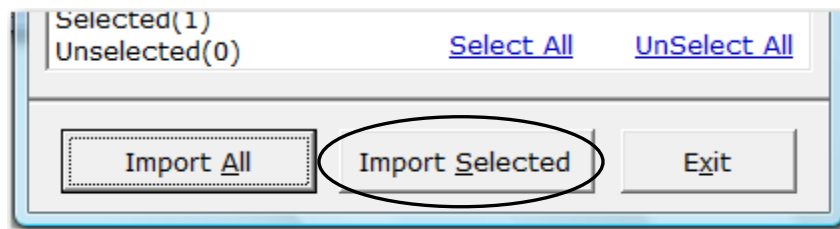
6. Click the **Yes** button when the confirmation window displays:
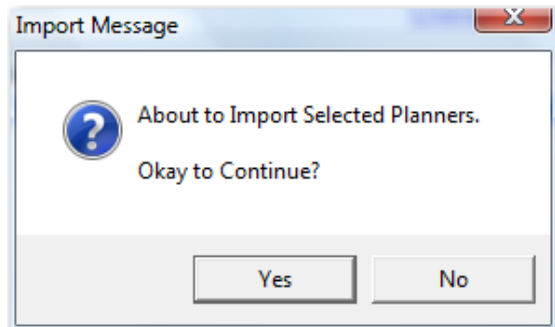
7. When the import process is complete, the results window will display. Click the **OK** button to continue:
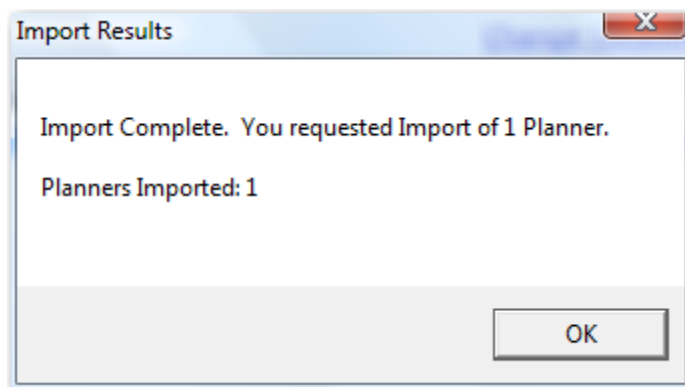
8. The PlanSeeGo Data Import Manager window displays again. Click **Exit** to close the window:
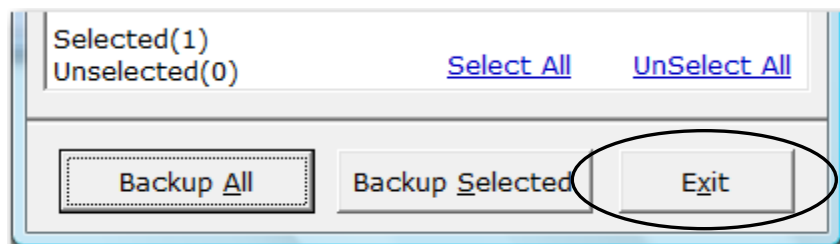
Uninstalling PlanSeeGo

If you want to move your PlanSeeGo program folder to a different location or another computer, you will need to uninstall the program from its current location. Follow these steps to uninstall PlanSeeGo:

1. Open the Console window.

2. Select the **Main Menu** icon in the Ribbon, then go to **Program and Data Management > See All**. You can also click the small widget in the lower right corner of the **Data Management** section of the Ribbon:
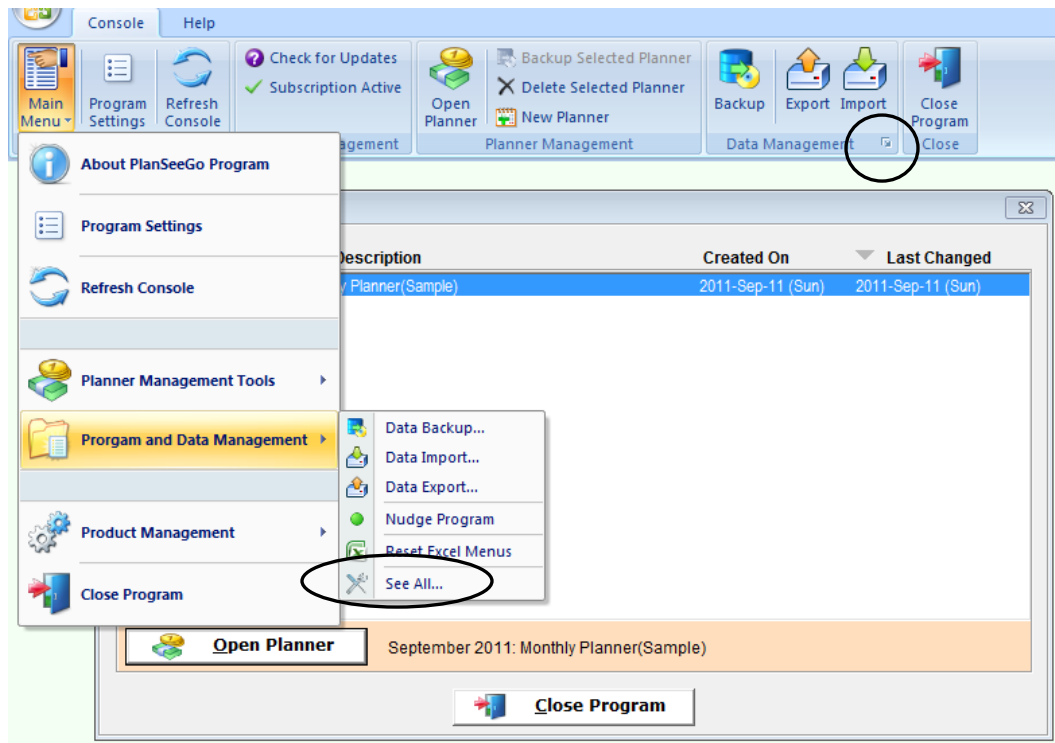
3. The PlanSeeGo Tools window displays. Click the **Uninstall PlanSeeGo** button:
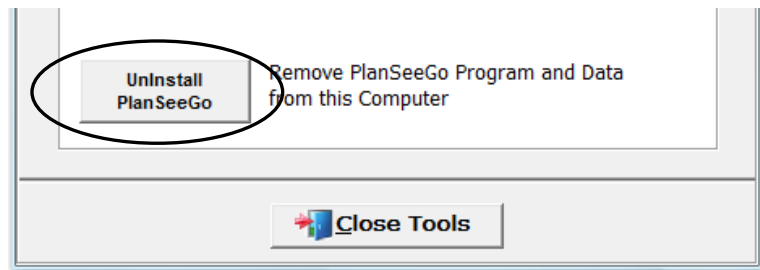
4. Click the **Yes** button when the confirmation window shown below displays:
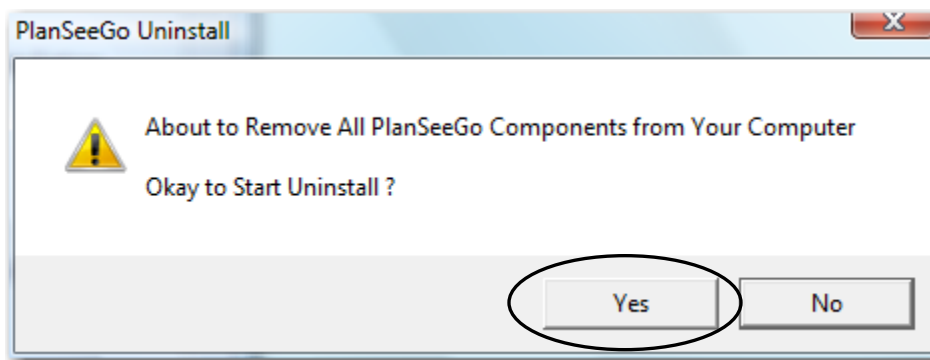
5. If you have created any budget plans, the window below will display:
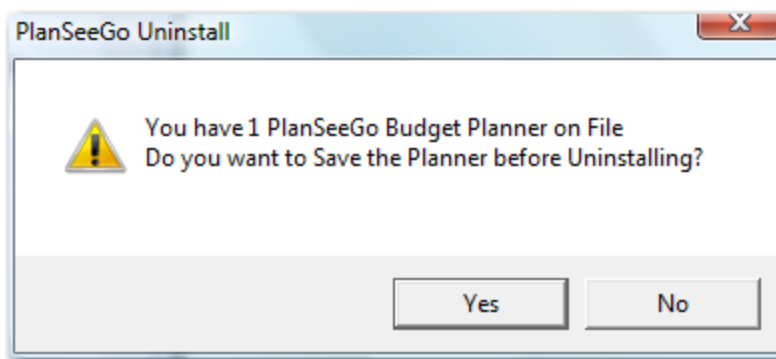
- If you have already backed up or exported your budget planner files, click the **No** button and proceed to the next step.

- If you have not backed up or exported your budget planner files, click the **Yes** button. The PlanSeeGo Data Export Manager window will display, and you will have the opportunity to save your budget planner files before they are removed during the uninstall process. For further instructions, see the **Backing up your PlanSeeGo planner files** or **Exporting your PlanSeeGo planner files** sections of this document.

6. When the uninstall process is complete, the confirmation window below will display. Click **OK** to continue:
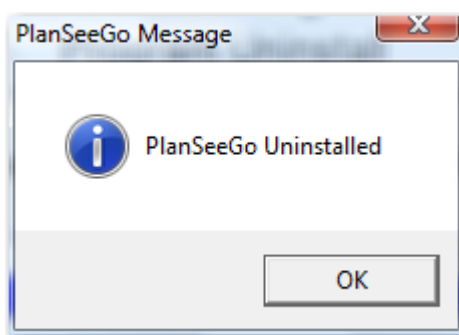
PlanSeeGo Installation Guide – Frequently Asked Questions

Q1. Does PlanSeeGo work in versions of that are older than Excel ® 2007?

PlanSeeGo no longer supports Excel versions running on Microsoft Office ® 2003 or earlier. If you have Excel version 2002 or 2003 and wish to run PlanSeeGo, please contact us at Support@PlanSeeGo.com.

Q2. I have Excel ® 2007. Do I need to do anything special before installing PlanSeeGo?

You should install Service Pack 2 (SP2) for Microsoft Excel ® 2007 before you install PlanSeeGo. If you have automatic updates enabled for Microsoft Office, SP2 should already be installed.

For more information on SP2, go to http://support.microsoft.com/kb/953195.

Q3. I want to install PlanSeeGo on a virtual PC. What do I need to do to make this work?

You must configure your virtual PC to use a consistent CPU ID. If this isn't done, PlanSeeGo will not start properly after the installation.

Q4. I chose a program folder location and name, and am getting the message "Cannot Install Into This Location". What do I do?

This message appears if you have selected a location and name for your PlanSeeGo program folder that already exists on your computer. For example, if you already have a folder on your computer called C:\Users\Public\Documents\PlanSeeGo, you cannot install into that pre-existing location. You can take one of two actions to resolve this problem:

(1) Change the install location to something other than **C:\Users\Public\Documents**

  -- or --

(2) keep the install location as-is and select a PlanSeeGo program folder name other than **PlanSeeGo**.

Q5. I moved my PlanSeeGo program folder to a different location. Now the program does not run. What do I do?

Move your PlanSeeGo folder back to its originally installed location. If you do not know the original installation location, you will need to reinstall the program and follow the instructions in the section of this document titled Importing your PlanSeeGo planner files.

Q6. I chose a program folder location and name, but received the error message below. What should I do?
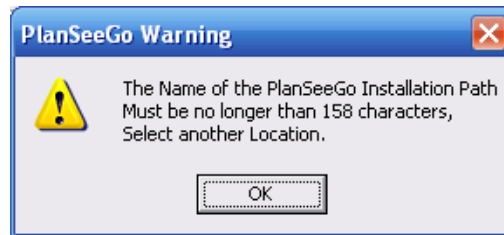
The total number of characters (words, letters, punctuation, and spaces) in the combined program folder location and name cannot be more than 158. If you receive this error, you must choose a different program folder location and/or name to proceed with the installation.

Q7. How do I verify the authenticity of a PlanSeeGo installation or Update file?

An authentic copy of the PlanSeeGo installation or program update file will always contain a digital certificate signed by MyFutureIsUpToMe, LLC, the exclusive publisher of PlanSeeGo. Right-click the installation file, select the **Properties** option and then select the **Digital Signatures** tab. If the installation file is authentic, MyFutureIsUpToMe, LLC will be displayed under the caption "Name of signer". Select the signer name with your mouse and click the **Details** button. You will then see a notice indicating the signature is authentic and the Signer name is verified to be MyFutureIsUpToMe, LLC. The signing time will vary and will not be the same signing time shown in the illustration below.
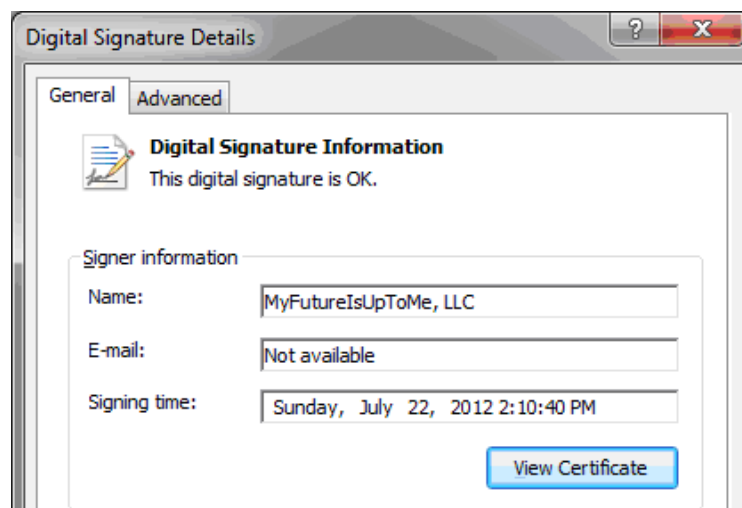
If the Signer name is not MyFutureIsUpToMe, LLC, then do not run the installation program. Visit PlanSeeGo.com for an authentic, certified PlanSeeGo installation program.