

PTP Spreadsheet Planners (Including Incorporation, Tax Credits and Dividend v Salary)

The PTP Spreadsheet Planners consist of:

- PTP Incorporation Planner
- PTP Tax Credits Planner
- PTP Dividend v Salary Planner

Please note: You do not need to have purchased all three products as each will run independently of the others.

Quick guide

- Visit our download webpage www.ptpsoftware.co.uk/getmysoftware
- Select the “**PTP Spreadsheet Planners**” link on the Software Downloads webpage
- Select the “**PTP Spreadsheet Planners Installation**” link and follow the installation wizard
- After the installation open the PTP Spreadsheet Planners program and enter your registration details

Detailed guide

Please note: The installation will differ depending on whether the program has been installed on the workstation before. The following notes have therefore been split into All Users, Existing users and New users as appropriate.



Important note: You must have administrative access rights to install the PTP programs. If you do not have the necessary access rights you will need to seek assistance from your own IT support.

All users

Having programs open during installation can cause problems. Please ensure that all PTP programs are closed before you start.

The PTP Spreadsheet Planners are supplied via a download page on the PTP Software website, www.ptpsoftware.co.uk/getmysoftware. From the list of programs on the page choose **PTP Spreadsheet Planners**, and then select the “**PTP Spreadsheet Planners Installation**” link. You can then follow the on screen Installation Wizard.

New users

The Installation Wizard guides you through the process to make it as easy as possible. There are however some points to note.

The Installation Wizard will ask you for the destination folder in which to install the program. We strongly recommend that you install to the default location. If you are installing the network level software please see the notes below.

Please note: Depending on what files your system already contains, Microsoft Windows may require you to re-boot.

After installing, please register your software.

Existing users

Following on from the All users section above, the Installation Wizard will guide you through the rest of the process. The software will install in the same way as the previous updates/service packs. You will need to install the software on each workstation in a network version separately, please see the network installation notes below. After installing, please register your software on each workstation.

Registration

To start PTP Spreadsheet Planners click Start, All Programs, PTP Software, Spreadsheets, PTP Spreadsheet Planners. Depending on your security settings, you may be asked if you wish to Disable or Enable Macros, select Enable. To register click the Register button in the opening window, and enter the details from your Registration Document. If you have difficulty entering your registration details see Troubleshooting below.



Important note: It is important that you keep the registration document.

Installing on a network

PTP Spreadsheet Planners should be installed on each workstation. It is possible when saving new records to choose where to save the files. It is therefore possible to save the files to a shared network drive. Click on File, Save As and the choice is provided on the next screen.