

Installing NaviPlan Select

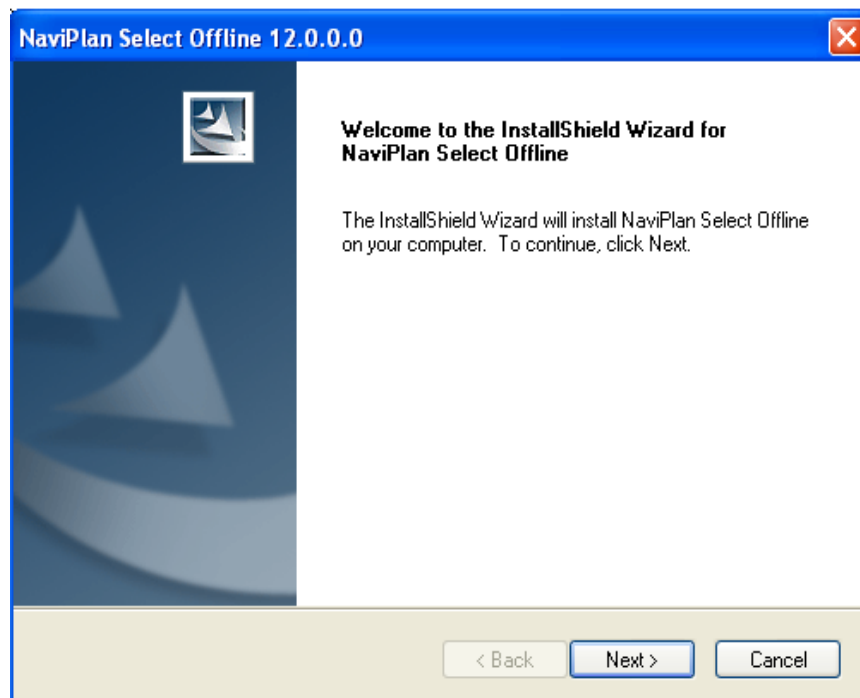
IMPORTANT: Review these instructions *before* downloading NaviPlan Select.

Before you begin:

- If you have a customized version of NaviPlan acquired through a home office, check with your home office and/or compliance department before installing this update.
- Ensure all your client files are saved and checked-in if you are an online user and your existing NaviPlan application is closed.

How to download and install NaviPlan Select – Transitioning from NaviPlan Standard to NaviPlan Select

1. Click the link called 'Download NaviPlan Select v12', which is in the Product Updates section of the NaviPlan Select support site: support.eisi.com/naviplan.
2. After the software is downloaded, the NaviPlan Install Wizard (shown below) prompts you through the installation process.
 - **Note:** If you are a NaviPlan Standard user it's recommended that you save NaviPlan Select to the default directories that appear in the Install Wizard. If you specify a different location, you may have difficulty accessing client files.



3. After the installation is completed and you have restarted your computer, a new NaviPlan Select icon appears on your desktop, as shown below.



4. To open NaviPlan Select, double-click the icon on your desktop.
 - If you were a NaviPlan Standard offline user (standalone)
 - At the login prompt after you open NaviPlan Select, select the **Standalone** option.
 - An *Authorization* dialog box opens. You have two options:
 - i. *Recommended option:* Contact our Sales department to authorize NaviPlan Select now: (888) 692-3474, option 2.
 - ii. Run NaviPlan Select for up to 30 days with the Advanced Planning Module. You must contact the Sales department to authorize and continue using NaviPlan Select, with or without the optional features, within 30 days.

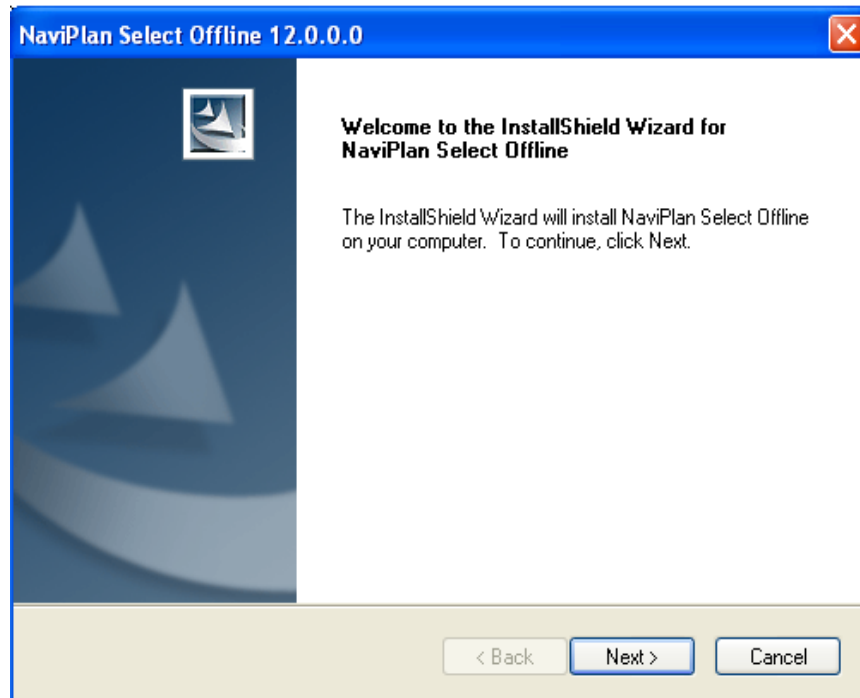
NOTE: *if you run NaviPlan Select in trial mode with advanced modules and create new clients or client files OR change data within existing clients or client files and decide NOT to authorize with all advanced planning modules you may experience a loss of data.*
 - If you were a NaviPlan Standard online/offline user (connected or disconnected)
 - At the login prompt after you open NaviPlan Select, select the **Connected** option, then enter your username and password. Your offline software will sync with your user profile on NaviPlan Central.
 - You can now use NaviPlan Select to access client files created in NaviPlan Standard. Once your client files are opened in NaviPlan Select, you are unable to open those files in NaviPlan Standard. It is recommended that you uninstall NaviPlan Standard.

How to download and install NaviPlan Select – Transitioning from NaviPlan Extended to NaviPlan Select

1. Click the link called 'Download NaviPlan Select v12', which is in the Product Updates section of the NaviPlan Select support site: support.eisi.com/naviplan.
2. After the software is downloaded, the NaviPlan Install Wizard (shown below) prompts you through the installation process.
 - **Note:** If you are a NaviPlan Extended online/offline user (connected or disconnected), it's recommended that you save NaviPlan Select to the default directories that appear in

the Install Wizard. If you specify a different location, you may have difficulty accessing client files.

- **Note:** If you are a NaviPlan Extended offline user (standalone), it's recommended that you change the default data directory when prompted from EISI/DATA to **EISI/DATA/Select**.



3. After the installation is completed and you have restarted your computer, a new NaviPlan Select icon appears on your desktop, as shown below.



- **Note:** If you are a NaviPlan Extended offline user (standalone), go to Windows Explorer and copy all of your existing NaviPlan Extended client files into the new EISI/DATA/Select directory, to allow you to open your existing NaviPlan Extended files in NaviPlan Select.
4. To open NaviPlan Select, double-click the icon on your desktop.
 - If you were a NaviPlan Extended offline user (standalone)
 - At the login prompt after you open NaviPlan Select, select the **Standalone** option.
 - An Authorization dialog box opens. You can run NaviPlan Select for up to 30 days before you contact our Customer Service department to authorize and continue using NaviPlan Select. To authorize, call (888) 692-3474, option 3.

- If you have difficulty with your *User Preferences* or *User-defined Asset Allocation*, please contact our Technical Support department at (888) 692-3474, option 4.
- If you were a NaviPlan Extended online user (connected)
 - You can now use NaviPlan Select to access client files created in NaviPlan Extended. When you do so, new copies are created. You can still use NaviPlan Extended to access the original client files; however any changes done in NaviPlan Select will not be reflected in those files
 - When you log in to NaviPlan select go to the *Client Management – Client List – Import Client* page to select client files to import from NaviPlan Extended to NaviPlan Select
- If you were a NaviPlan Extended online/offline user (connected or disconnected)
 - Along with the NaviPlan Select installation you must upgrade NaviPlan Extended to v10.2.0.14. Click the link called ‘Upgrade to Version 10.2.0.14’, which is in the Product Updates section of the NaviPlan Extended support site: support.eisi.com/extended.
 - At the login prompt after you open NaviPlan Select, select the **Connected** option, then enter your username and password. Your offline software will sync with your user profile on NaviPlan Central.
 - You can now use NaviPlan Select to access client files created in NaviPlan Extended. When you do so, new copies are created. You can still use NaviPlan Extended to access the original client files; however any changes done in NaviPlan Select will not be reflected in those files
 - When you log in to NaviPlan select go to the *Client Management – Client List – Import Client* page to select client files to import from NaviPlan Extended to NaviPlan Select

Need help?

If you require assistance installing NaviPlan Select or transitioning from a previous program, please contact our Technical Support department at (888) 692-3474, option 4.