

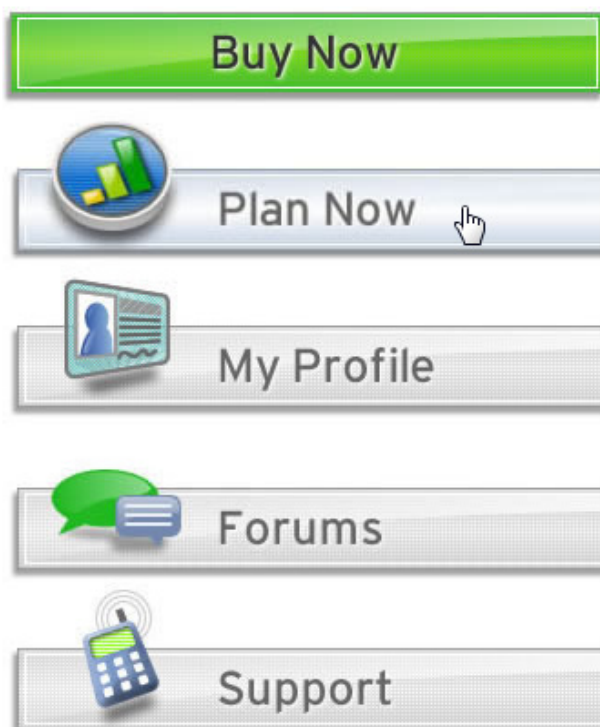
Getting Started - How to Install Voyant Adviser

Voyant Adviser is a [rich internet application](#), meaning that it has all of the data sharing conveniences of a web application but is installed to your computer and runs much like a desktop application. Unlike a pure web application, Voyant Adviser can be used offline whenever a connection to the internet is unavailable. There is no need to open a browser to run the software. And unlike a desktop application, Voyant Adviser can be used easily on different computers and by groups of users. Client files are updated, shared and automatically synchronised between computers.

1. To run the software, your computer must also be running **Java 6 Update 14 or later**. Java can be downloaded and installed, free of charge, from the Java website, <http://java.com>.
2. To run a quick check of your computer for Java, visit the [Java website](#) and click the "Do I have Java?" link.

Using Voyant Adviser on Mac OS X? Mac operating systems use a separate version of Java provided by Apple. If you are checking for the installation of Java on a Mac computer, you may be directed to use the **Software Update** feature on the Apple menu. Additional details are available on both the [Java website](#) and the [Apple Support website](#).

3. Visit the **Voyant UK website** www.planwithvoyant.co.uk.
4. Sign in and install Voyant Adviser by clicking the **Plan Now** button. Alternatively, click the **Plan** link in the top navigation.



Visit Voyant's UK Website

Please be sure to visit our U.K. website <http://www.planithvoyant.co.uk> to install the UK version of Voyant Adviser.

Voyant's U.S. website www.planwithvoyant.com offers access only to the U.S. version of Voyant Adviser.

Subscribing Through AXA Elevate?

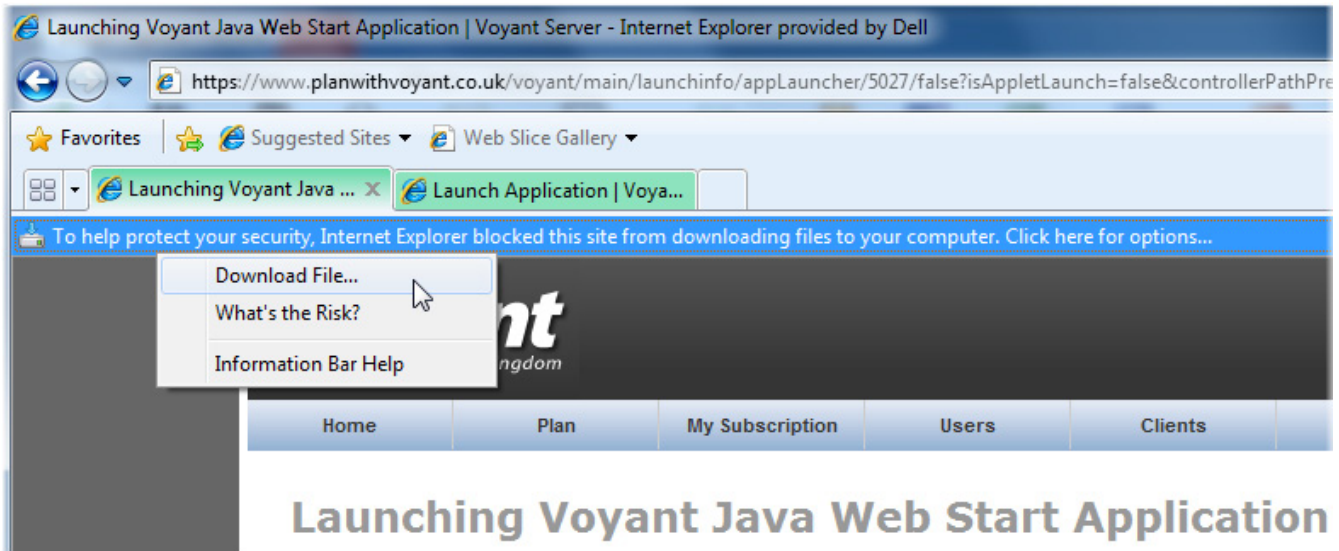
Visit us instead at <http://elevate.planwithvoyant.co.uk> and access the site using your AXA platform user name and password.

Browser-Specific Installation Tips

Internet Explorer

Depending on your browser's security settings, Internet Explorer may initially block the installation of Voyant Adviser. A security warning will display beneath the navigation tabs of the browser.

Click this warning message and select **Download File** if you wish to continue with the installation of Voyant Adviser.

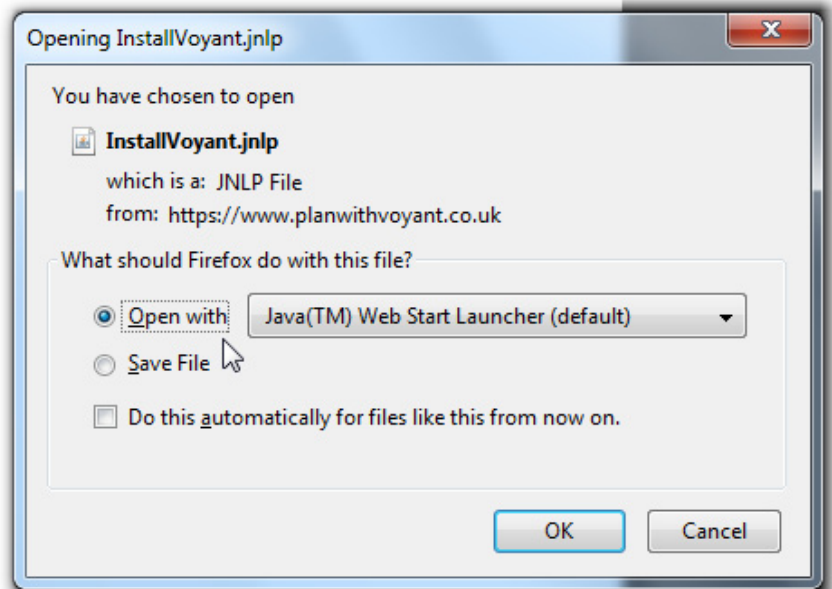


Launching Voyant Java Web Start Application

Mozilla Firefox

Firefox will prompt you with two installation options: to download the installation file for Voyant Adviser (InstallVoyant.jnlp) or to open it using Java Web Start.

1. Select the **Open With** option. The **Java Web Start Launcher** should already be selected as the default programme that will launch the file.
2. Click **OK** to continue with the installation.



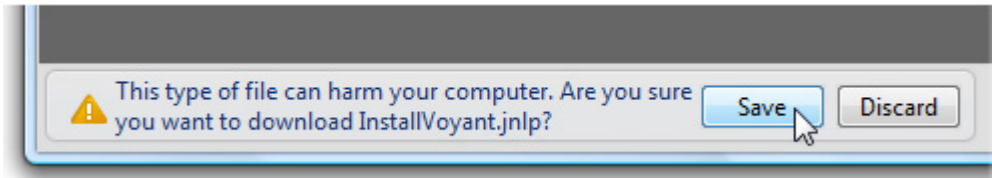
If the Java Web Start Launcher is not shown, you may not have Java installed on your computer. Java can be downloaded and installed, free of charge, from the Java website, <http://java.com>.

To run a quick check of your computer for Java, click the "Do I have Java?" link on this website.

Google Chrome

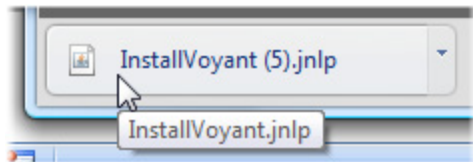
Depending on the browser's security settings, Chrome browsers may display a security warning before downloading the Voyant Adviser installation file – the `InstallVoyant.jnlp`. This warning will appear in the bottom-left corner of the browser window.

1. Click **Save** if you wish to download the file and continue with the installation of Voyant Adviser.



The Voyant Adviser installation file, **InstallVoyant.jnlp**, will be downloaded and displayed in the bottom-left corner of the browser window.

2. Click this downloaded installation file to begin installing the software.



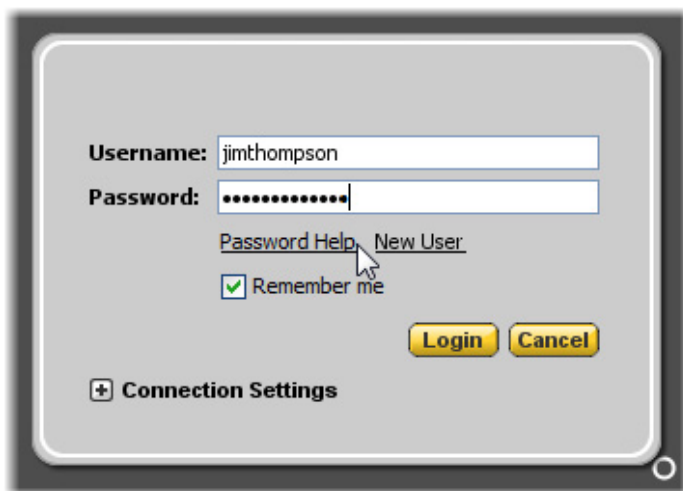
How to Launch Voyant Adviser

Voyant Adviser runs locally from your computer, much like a desktop application although it really isn't one, strictly speaking. The software is actually [Rich Internet Application](#) (RIA). Once you have installed Voyant Adviser, there is no need to log into our website to run it. In fact, doing so will reinstall the software. Reinstallation can be convenient if you ever have problems launching it but this is usually unnecessary.

1. Open Voyant Adviser by clicking the desktop link. If you are using a Windows computer, an additional link to Voyant Adviser is available in the **Start** menu > **All Programs** > **Voyant Adviser – UK**.

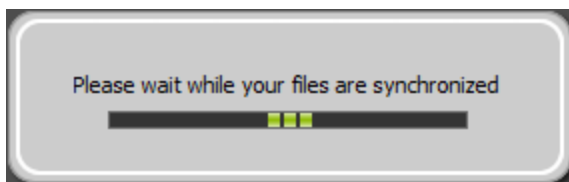


2. Sign into the software using your user name and password.



The login screen features a 'Username' field with 'jimthompson' entered, a 'Password' field with masked characters, and a 'Remember me' checkbox which is checked. There are 'Login' and 'Cancel' buttons, and a '+ Connection Settings' link at the bottom left. Links for 'Password Help' and 'New User' are also present.

Each time you open Voyant Adviser, the software will synchronise with our servers, loading the latest saved versions of your client files.



After signing in, a brief series of one to three interstitial screens may display, showing: the number of days left in your trial of the software, if you are not currently a subscriber; the software's latest release notes, if an updated release of the software was installed automatically to your computer; and upcoming training opportunities.

3. Click **Continue** to navigate through these informational screens.

User Names, Passwords and Login Assistance

These are the same credentials you chose when registering on our website (www.planwithvoyant.co.uk).

If you are unable to recall your credentials, click **Password Help** to use our website's user name and password assistance tools.

Contact Voyant Support

support@planwithvoyant.co.uk if after using these tools you are still unable to sign or if you are encountering any problems connecting to the Voyant server.

Voyant-AXA Elevate Users

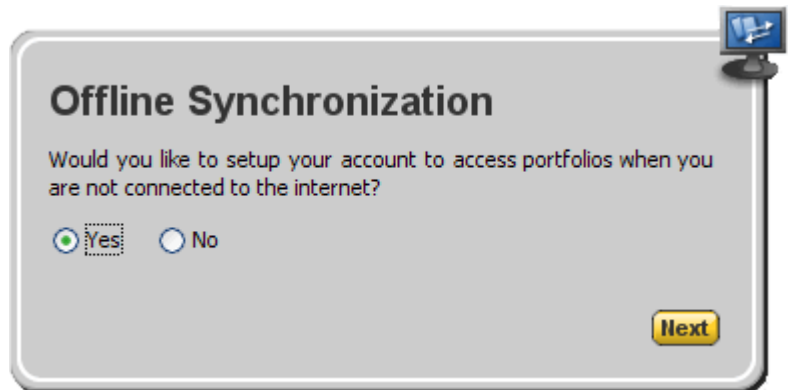
Users of the **Voyant-AXA Elevate** software should sign in using their Elevate platform credentials. Contact AXA Customer Care for assistance with expired passwords.

Use Voyant Adviser Offline – Set Up Offline Synchronisation, Choose an Offline Passcode

As a Rich Internet Application (RIA), Voyant Adviser normally operates using a live internet connection. But the software can also be run in offline mode when no internet connection is available. Travelling to visit a client? Take Voyant Adviser on a laptop and use the software to create, present or update a financial plan regardless of internet availability.

After downloading and first opening Voyant Adviser, you will be asked whether you want to have access to client files when running the software offline.

1. Select **Yes** if you plan to use Voyant Adviser to access client information, at least occasionally, in the offline mode.
2. Click **Next**.

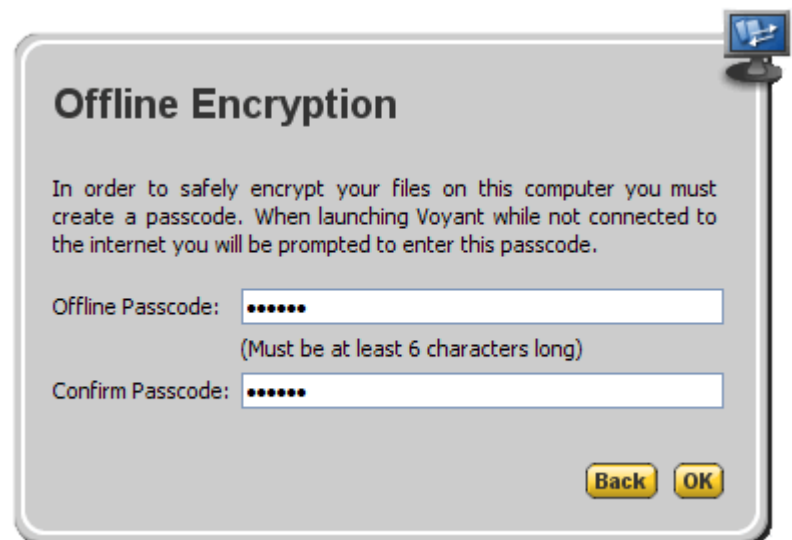


Enter an Offline Passcode

As an additional security precaution, an offline passcode (password) is used to encrypt client files and authenticate user credentials when Voyant Adviser is used offline.

3. Enter a passcode that is at least six characters long.

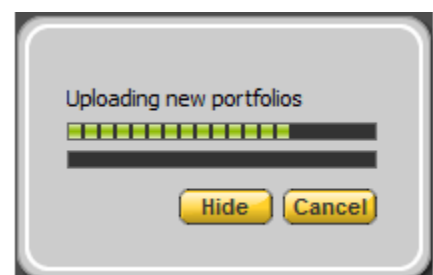
This passcode can match your Voyant user account password. The code will be encrypted and stored safely on your computer. Bear in mind that like Voyant passwords, offline passcodes are also case-sensitive.



4. Click **OK**.

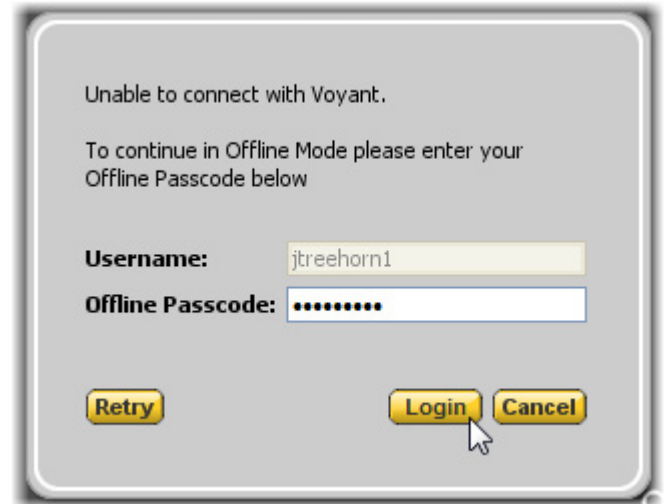
Note that this passcode can later be changed and offline mode enabled or disabled, if necessary, by accessing **Preferences** in the lower left corner of the screen. Expand **Application Preferences** to view the offline mode settings.

Later, as you bring your computer online again, client files will be automatically synchronized with Voyant's remote hosting environment. Synchronization allows client information to be accessed from any computer – at home, in the office or on the go – without ever transferring files from computer to computer.



With offline mode enabled, you will be prompted to enter a passcode whenever the software detects that an internet connection is unavailable. This passcode will allow you to log into the software and access client files locally when the Voyant server cannot be reached.

Note that Voyant Adviser can be used offline for a **maximum of seven consecutive days**, after which you will be required to sign into the software online so that your licence can be validated with the Voyant servers.

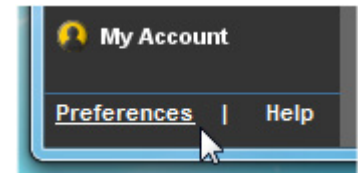


Preferences – Activate Offline Mode Anytime After Installation, Update Your Offline Passcode

To view and update settings related to using Voyant offline:

1. Click the **Preferences** link in the lower-left corner of the software's navigation.

Preferences are arranged into a series of expandable panels.



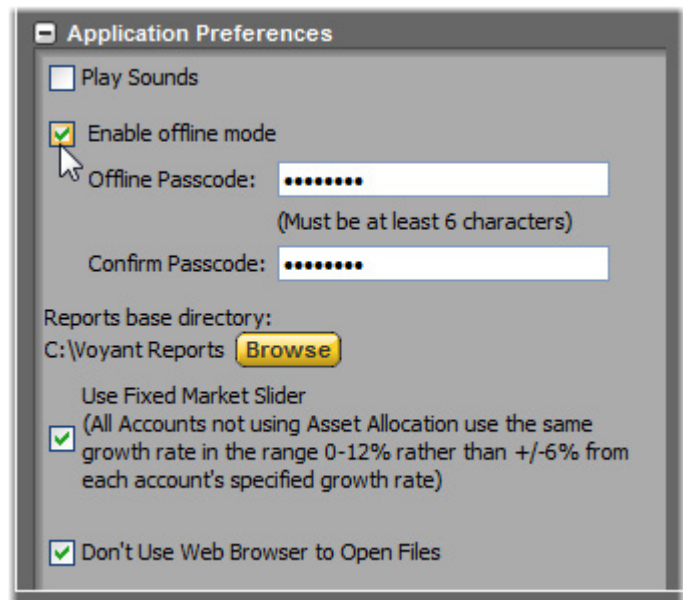
2. Expand the **Application Preferences** panel. This panel includes settings to enable or disable offline mode.

3. Tick the **Enable Offline Mode** check box to allow the software to be used when an internet connection is unavailable.

4. Enter an **Offline Passcode** of your choice.

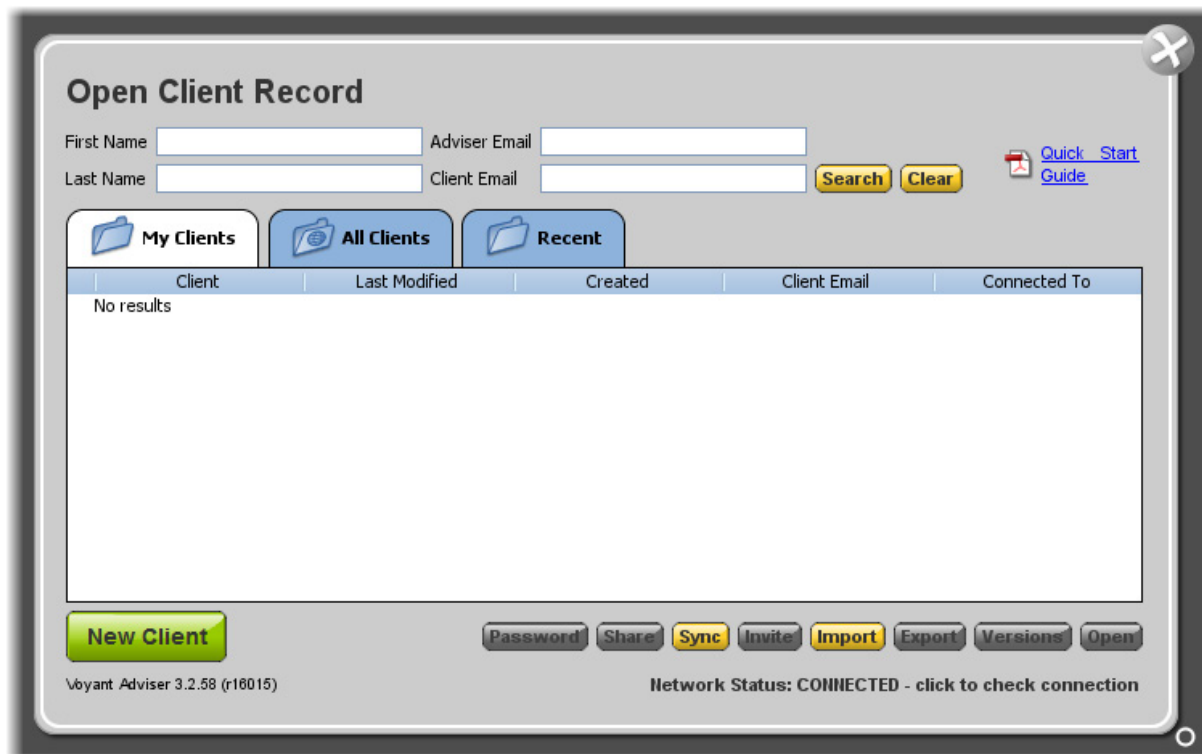
5. Reenter the passcode in the **Confirm Passcode** field.

6. Click the **Apply** button to save these updates to the System Preferences.



Create a New Client Case File - The Open Client Record Dialogue

The **Open Client Record** dialogue will then display. This is where you can open existing client files or create new ones.



Click the **New Client** button to start work on a new client file. Let's create your first client file, in this case for the Campbells.



Questions, Assistance?

Should you have any questions when building your first client case file, please feel free to contact our support staff by e-mailing support@planwithvoyant.co.uk.