Installation Instructions
Planned Giving Manager Products
Planned Giving Manager/Mini Manager/Gift Annuity Manager
Version 7.7B
Windows

The Planned Giving Manager (PGM) installation program can install PGM onto your local hard drive. The installation program provides complete instructions as you run it. If you have any problems with installing PGM, please contact our Client Services Department at 888-474-2252 or support@pgcalc.com.

1. Before you begin:

   - **If your computer support staff helped you install a previous version of PGM or you are uncomfortable installing software**, you should get help installing the PGM 7.7B update from your computer support staff. They may need to log on to your machine with administrative rights to perform the install. And they may need to use the alternative WinZip installer for network installs if they did so before.

   - **If you are installing to a shared network directory** or other environment where the InstallShield installation program does not work, you can obtain a WinZip version of the PGM install program at: https://marketing.pgcalc.com/pgm-77b-downld. Use those instructions instead of these.

   - **Do not delete your existing PGM files if you are updating an existing PGM program!** PGM will require some of them to run. Consider backing up your pgmw32.dat configuration file by copying it from your PGM application folder (by default C:\PGM) to another location, in case you need to reinstall the previous version.

   - **If you have modified any of the narratives** in your existing PGM program and saved them without changing the file name(s), the PGM installation program may overwrite them. We suggest that you first rename your modified .nar narrative files before running the update.

   - **Close all Windows applications** that are currently open, including PGM. The task bar at the bottom of your screen should contain only the *Start* button when you have completed this step. If you install PGM with PGM open and running, you will receive a message that you need to reboot your machine to complete the installation.

2. Using your Internet browser, go to: https://marketing.pgcalc.com/pgm-77b-downld. Click the *Download PGM 7.7B* button. What happens next depends on whether you are using Internet Explorer, FireFox, Chrome, Safari or another browser. Your browser may give you the choice to run or open the download, or to save it in a download manager or folder to run later. If you are prompted with a Save As window, make note of the location you select so that you can find the download on completion. **Do not save the *pgm77b.exe* file to your PGM folder.**

   The download may take a few minutes depending on your internet connection speed, you may get a notification on completion of downloading, and you may need to double click the *pgm77b.exe* download file to launch. Once the download launches, go to step 3.

3. Follow the step-by-step instructions provided by the installation program.

   - If you get a blue screen with the warning, "Microsoft Defender SmartScreen prevented an unrecognized app from starting," click the *More Info* link, confirm that PG Calc Incorporated is the publisher, and click the *Run anyway* button.

- If you get a screen indicating InstallShield will **"update the installed version"** of PGM, that indicates that you are updating a previous version of PGM and the new version will be installed into the same directory. Click *Next,* then click *Finish,* and skip to step 7.

- If you get a screen asking if you want to **Modify, Repair, or Remove** PGM, that indicates that you have already installed this version of PGM. Choose *Repair* and any missing components will be reinstalled. Then click *Finish* and skip to step 7.

- If the installation program doesn't run or gives an error message, check with your computer support staff as to whether you have sufficient rights to install PGM and whether virus-protection or other security software needs to be turned off or otherwise configured to let you install PGM.

4. If this is your first time installing PGM on this machine, you will be presented with a ***Customer License Agreement***. Please read the agreement and, if you agree to the terms, choose *I accept the terms of the license agreement* to continue with the install process. If you wish to print the agreement, click the *Print* button. When done, click *Next.*

5. By default, PGM will be installed into the *C:\PGM* directory on your local hard drive. To install the update in a folder other than *C:\PGM,* click the *Change* button, select the folder (or type in the directory path) in which to install the update, and then click *Next.*

6. The next screen will confirm that the program install wizard is ready to begin installing PGM. To continue, click *Install.* Once the install program has completed, click *Finish.* If you receive a message from the Program Compatibility Assistant asking whether to reinstall, choose ***"This program installed correctly."***

7. Double click on the *PGM* icon on your desktop. You may see a **License Authorization** screen.

- If this is a **new PGM install,** enter the 16-character authorization code included in the introductory letter or email that accompanied your software. Click *Enter.* Next you will see an Initial Setup screen. Fill it in with your organization's name and the other requested information. Click *Enter.*

- If you are **updating an existing PGM program,** getting the License Authorization screen indicates PGM is not finding your old pgmw32.dat configuration file. You may have installed to a different location from your previous version of PGM, in which case you should uninstall and reinstall to the correct location. If you installed the previous PGM using the network install, see step 1 above.

You may also see a screen asking you to confirm what gift annuity rate table to use. Ordinarily, you will want to choose the latest ACGA rate table.

8. The PGM copyright screen will open briefly and should reflect **Planned Giving Manager Version 7.7B**. The copyright screen will close automatically. You can display the copyright screen anytime by choosing Help-About in the Menu Bar.

9. **Special instructions for install by administrator:** If you are installing PGM while logged in as an administrator rather than as the user who will be running PGM, you should check file access privileges to the PGM directory on completion of the install. Ordinarily the user should be given full access to the PGM directory. At a minimum, the user should be given read/write access to the following configuration files: *pgmw.dat, pgmw32.dat, pgm.ini,* and *afr.ini.* To confirm, have the user who will be running PGM log on, run PGM, change one of the settings in the Customize menu, and see if they can save that change.