



Installing Proactive Sales Coach (PSC)

There are three versions of PSC: the installation process below is the same in all cases.

PSC operates as a licensed application running on Excel. This is primarily to provide a sufficiently comprehensive calculating engine but it also enables the PSC to be adapted fairly quickly to fit any corporate requirements.

In order for PSC to work, you must have a compatible PC (or Mac) with Excel from Office 2007 or later, 32 or 64 bit.

You can download a trial of your preferred version of PSC from <http://www.no2ndprize.co.uk/download/>.

The download is in the form of a zip file. This contains:

- This Installation guide as a .pdf
- The chosen PSC app as an executable
- The full PSC user manual, also as a .pdf

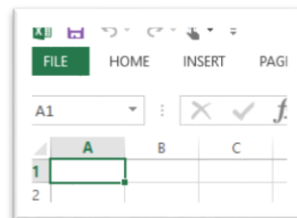
You can extract these into your chosen location.

Before you click on the executable...

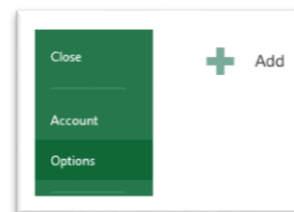
The licence uses some vba code, so *before you open PSC for the first time*, you must enable signed macros on Excel.

To do this:

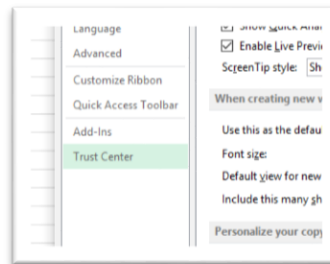
1. Open Excel, if not open.



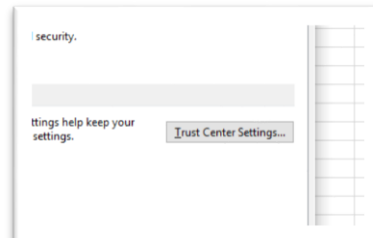
2. Click on the "File" menu



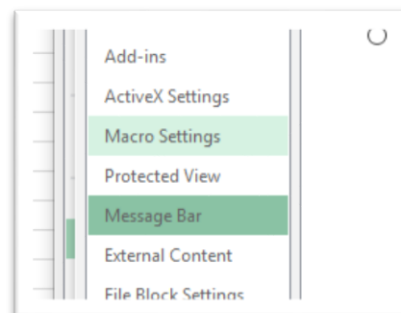
3. Select "Options" (at the bottom on the left)
4. This opens the "Excel Options" Window.



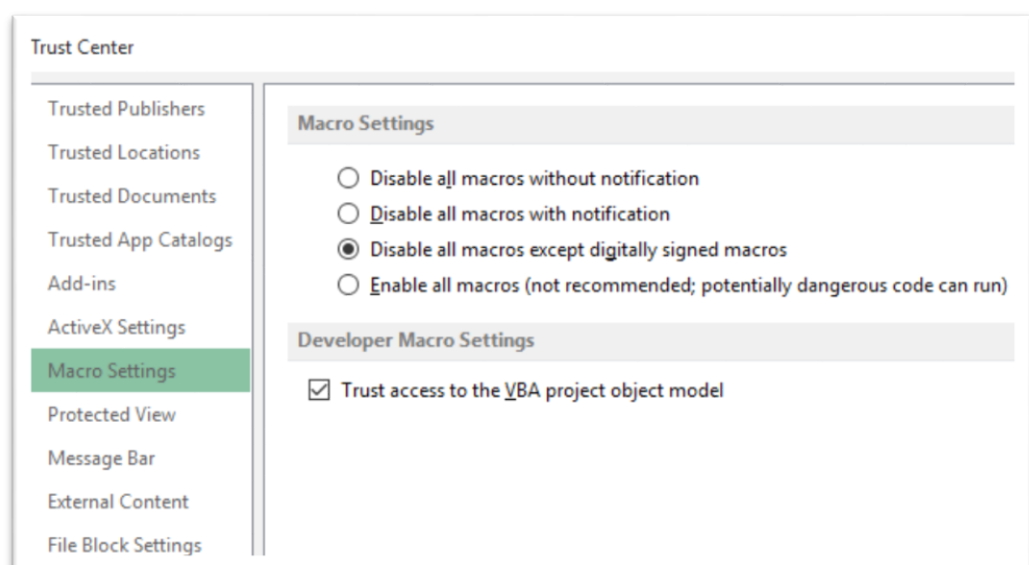
5. Select “Trust Center” – the bottom option



6. Click “Trust Center Settings...” (RHS)
7. This brings up a new dialog box.



8. Select “Macro Settings” – half way down
9. Tick the “Trust access to the VBA project object model and select “Disable all macros except digitally signed macros”.
 - a. It is NOT recommended to select “Enable all macros” – though this will work. Excel macros are sometimes used to spread malicious code and unsigned macros should therefore remain blocked.



10. Click OK. This closes the Trust Center dialog box.
11. Click OK to close the Excel Options dialog box



12. Now save any other workbooks you may have open and **shut down Excel**.

13. Click on the PSC executable, identified with one of the three icons below:



For PSC Lite

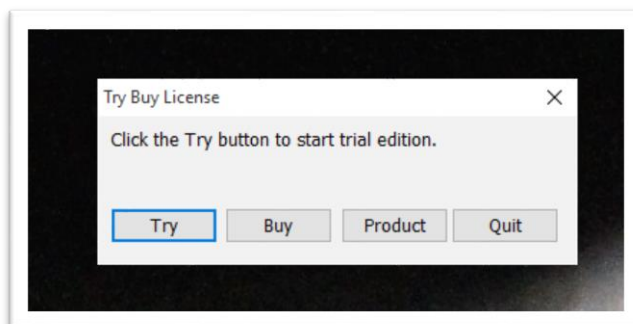


For PSC Std

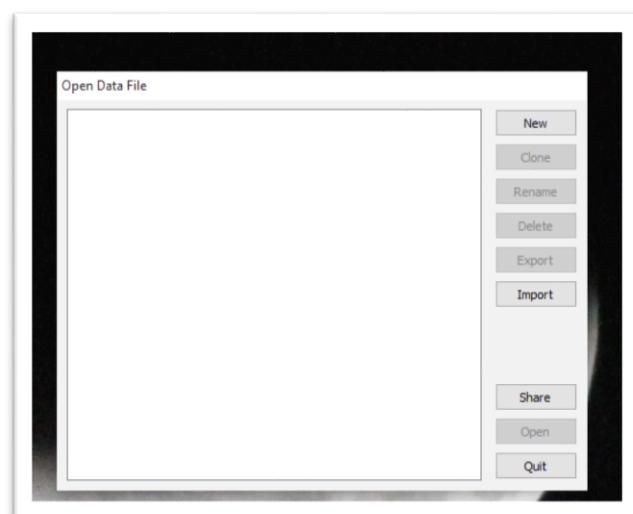


For PSC Pro

14. You will be presented with a Try/Buy dialog box.

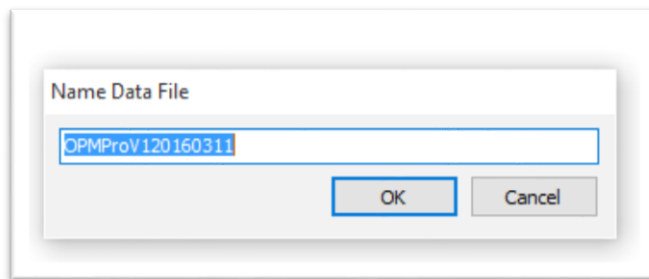


15. Click on "Try". This will bring up the File Manager dialog box.





16. Click on “New”. This brings up a “Name Data File” dialog box.



- a. Note: The default file name is the PSC software version and a date – but make it whatever means something to you just by typing in the box.
- b. Each opportunity you work on will have its own file – so use names that make sense
- c. If you use the default and save multiple project files on the same day you will have to re-name subsequent ones – this is also true of multiple versions of your own file names
- d. Special and non-alphanumeric characters may sometimes result in a permission error – spaces are OK, though.

17. Click on OK once you have named it or accepted the default.

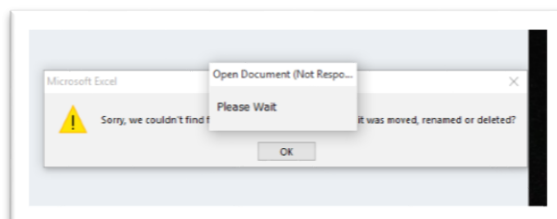
18. The file will be created and appears on the project file list. It will be highlighted.



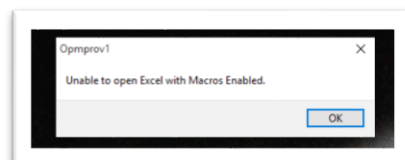
19. To open it, click Open - RHS, near the bottom

20. Excel will start momentarily and then close again – *this is normal and only occurs when you open the first file on each PSC work session.*

21. **If you already had Excel open, it will hang and present you first with an error box:**



22. If this happens, shut Excel manually using file manager or wait for PSC to shut it down, when



you will see:

23. Then click on OK and click on the PSC icon and start from Step 15 again.

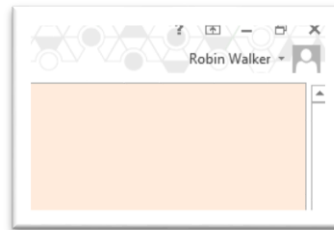
24. Once PSC is running, you may open other Excel workbooks or create new files in the normal way with no constraints: the only limitation is you cannot start PSC if Excel is already open.

25. You are now ready to use PSC to help you make better, more proactive sales decisions.

26. To understand what the inputs are and how to use PSC, refer to the accompanying User Manual as you work your way through the various tabs.

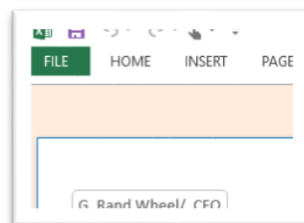


When you have finished entering information into this opportunity file, close it with the normal top right hand “Close” X button – when you do this, you will be prompted to confirm save (so you can say No to abandon your changes).



Doing this will save the opportunity file and return you to *the file selector menu* so you can continue working with another opportunity.

You can also hit the “Save” button (or click Ctrl + S in the usual way), doing this will bring up the same save prompt but then *exit you from the PSC app altogether*.



If you use close to return you to the file menu, you can also quit from there.