

SalesOut Excel Add-in Installation

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1. Requirements

1.1. System Requirements

- The SalesOut Excel Addin will only work on Windows, not MacOS.
- Excel 2013 or later is required. Office 365 is fine.
- Edge internet browser. Referred to hereafter as “your browser”. Chrome, Opera, Firefox and other commercial browsers will **not** work. Mostly Edge is found on Window 10 and later.
- An internet connection is required for the install and to connect to SalesOut data.

1.2. Skillset Requirements

- Know what Windows version you are installing on. For the purposes of this process its either Windows 10, 11 or Windows earlier version.
- Know how to do a screenshot. If anything goes wrong at any point of the install you **must** report the exact wording of any error message to SalesOut. The simplest way to do this is by taking a screenshot of the relevant bit.
- Know how to open and use Windows Explorer to explore your computers files.

2. Summary of Installation

The Add-in is released as a Click-Once install downloaded from the SalesOut website cubes.salesout.co.uk, the same site used to connect to SalesOut data.

2.1. Initial Install

This type of installation **must** be done from Microsoft Edge browser.

2.1.1. Download

Using Microsoft Edge browser, click the Download the installation file link found at <https://cubes.salesout.co.uk>



SalesOut Excel Add-in



[Download the installation file](#)

[Read the installation guide](#)

Open this file?

Do you want to open SOExcelAddIn.vsto from cubes.salesout.co.uk?

[Report file as unsafe](#)

Open

Cancel

Microsoft Office Customization Installer

Publisher has been verified

Are you sure you want to install this customization?



Name: [SOExcelAddIn](#)

From: <https://cubes.salesout.co.uk/SOExcelAddIn/SOExcelAddIn.vsto>

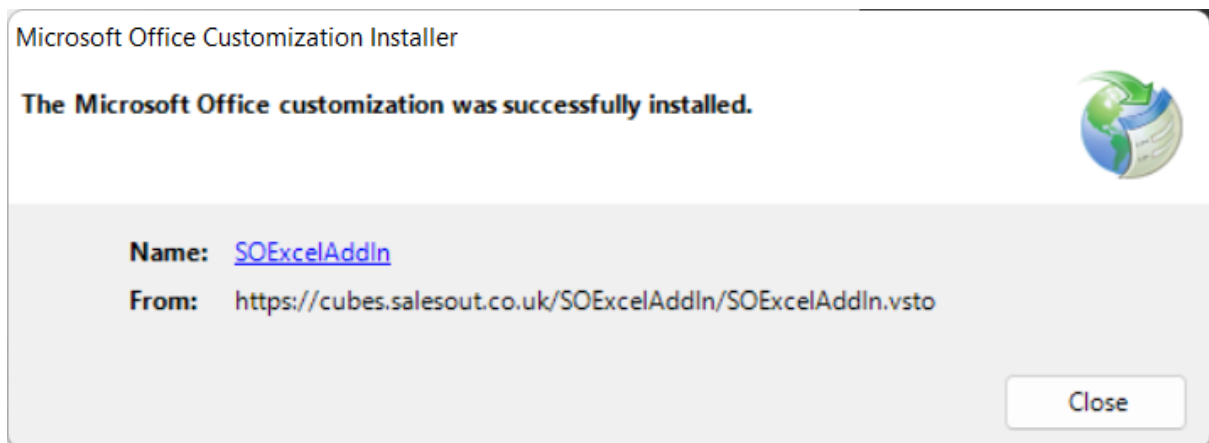
Publisher: [Information Resources, Inc.](#)



While Office customizations from the Internet can be useful, they can potentially harm your computer. If you do not trust the source, do not install this software. [More Information...](#)

Install

Don't Install



It will automatically download and install the AddIn.

The next time you open Excel there will be an SalesOut tab, under that will be some SalesOut options.

2.1.2. Trust SalesOut

Although the software now has been certified to verify that it comes from a known publisher, if the download fails you may still need to set SalesOut as a trusted website by adding cubes.salesout.co.uk to trusted sites. See [step-by-step](#).

2.2. Version

Once installed, the current Addin version can be seen by selecting the SalesOut tab and noting the number displayed beneath the SO logo on the Addin ribbon.

2.3. Automatic Updates

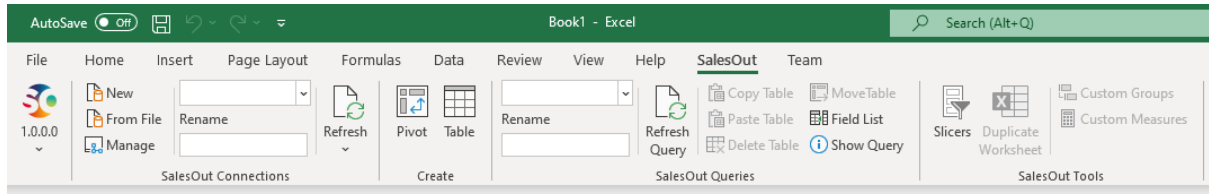
Once installed, each time you open Excel while connected the internet it will check to see if there is an updated version available and automatically install updates if available.

3. Step by Step Guide

Follow the Q&A and click on links (underlined) to move to next step

3.1. Is the Addin already installed?

Open Excel, is there a SalesOut tab on the ribbon with SalesOut options in it? [Yes](#) / [No](#). If Yes then this is effectively an Update. The link will take you to that.



3.1.1. What version is installed?

- Check the number below the SalesOut logo on the ribbon (see above)
- Check with SalesOut support what the latest version number is.

Version is current? [Yes](#) / [No](#)

3.2. Install

3.2.1. Download

- Make sure Excel is closed.
- Using Microsoft Edge browser, click the “Download the installation file” link found at <https://cubes.salesout.co.uk>

Did the Addin install successfully? [Yes](#) / [No](#)

3.3. Installation Error Messages

If there are any error messages it is vital to either write down the exact wording of the message or take a screenshot of that window. SalesOut will need to know the sequence of events leading up to that point.

Some messages may have 2 buttons underneath: Details and Close. Always click Details, often the details IT require will be there.

3.3.1. Untrusted site?

The SOExcelAddin is independently certified by Digicert.com to verify that it was produced by a known publisher (IRI). However, depending on the security policies applied on a PC it might still be necessary to manually "Trust" cubes.salesout.co.uk. See [here](#).

3.3.2. Already Installed?

If something fundamental changes either to the download or the PC (Windows or Office updates might be enough) then it might be necessary to uninstall and reinstall the Addin. The error message will tell you that. Go to [Uninstall](#).

3.3.3. Any other Error message at this point

Contact SalesOut IT via your Account Manager.

3.4. Trust the SalesOut website

3.4.1. Windows 10 Trust

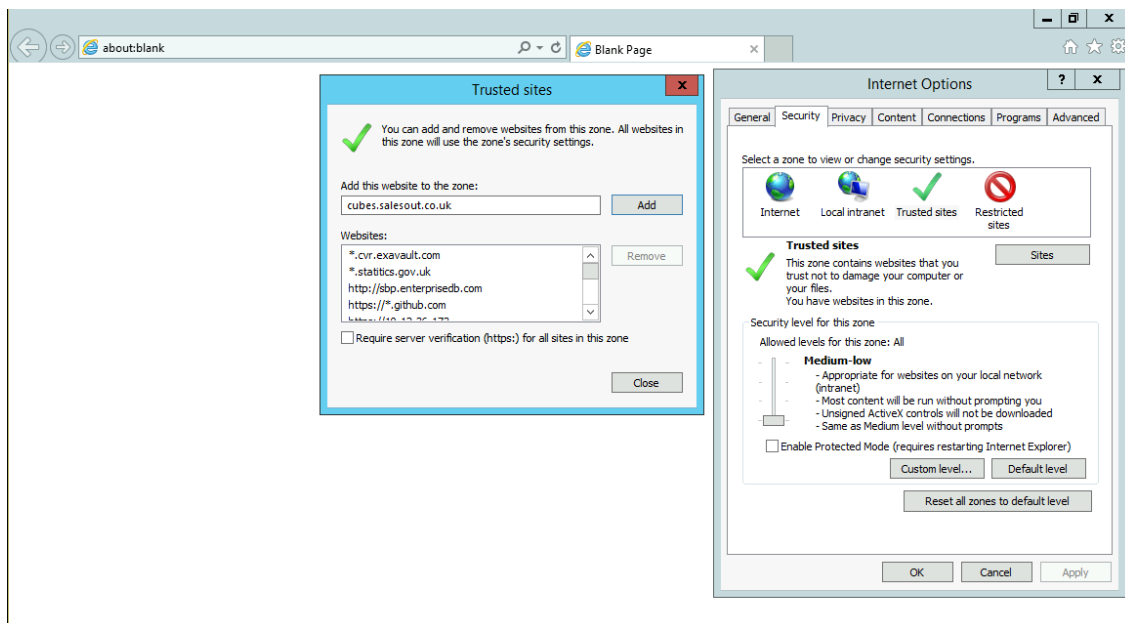
- In the bottom left of screen click on the Search icon next to the Windows logo
- Type “Internet Options” which should find only one result, select that and it will bring up the same [Internet Options](#) as for Older Windows.

3.4.2. Windows 11 Trust

- Click the Windows logo on the toolbar and type “Internet Options” which should find only one result, select that and it will bring up the same [Internet Options](#) as for Older Windows.

3.4.3. Internet Options

- Select Security tab and click on Trusted Sites as shown below
- Enter cubes.salesout.co.uk in the upper box and click Add



3.5. Updates

Updates will normally be automatic but sometimes after accepting Office updates it is necessary to reinstall the Addin.

3.5.1. Re-install

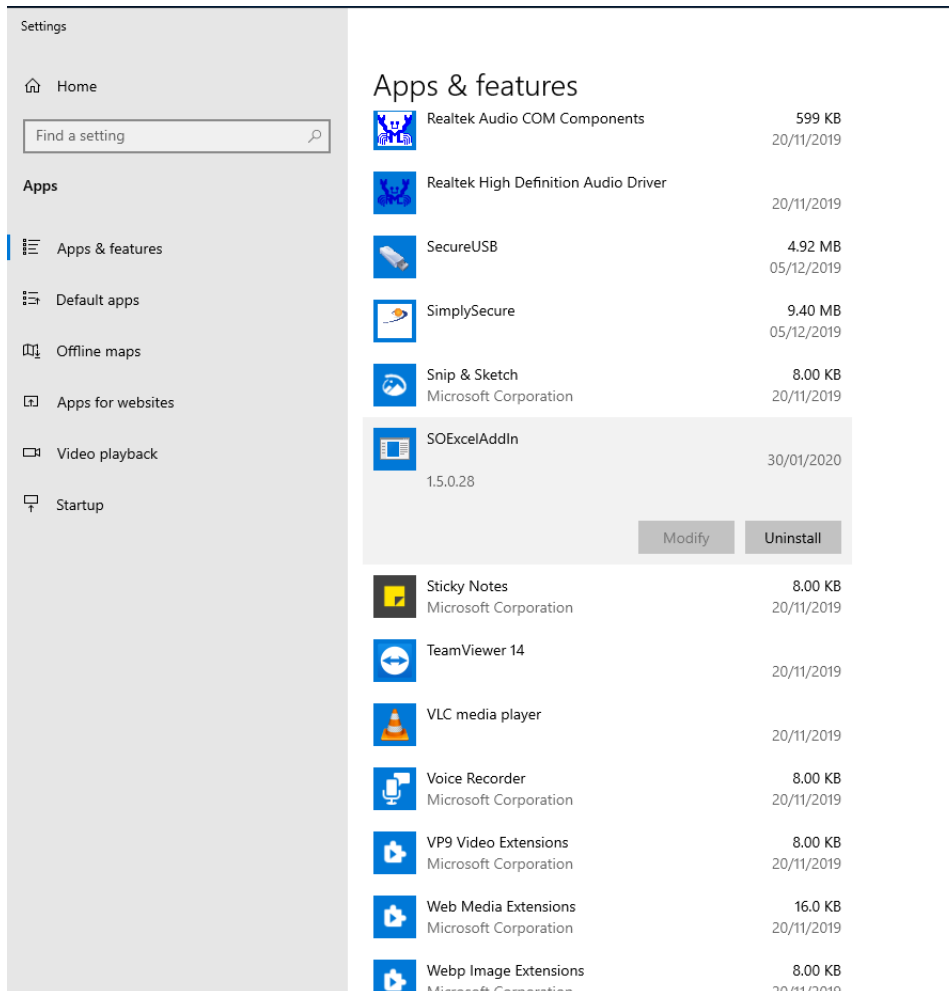
Sometimes after major updates of Windows or Office 365 it is necessary to clear references to the old version of the Addin before reinstalling. Follow these steps:

1. [Uninstall](#)
2. [Clear temporary data](#) that contains references to the old version
3. Reboot. Switching it off and on again is normal for Windows.
4. When Windows comes back up, before reopening Excel retry from [Install](#)
5. Did that work? [Yes](#) / [No](#)

3.5.2. Uninstall the Addin

Windows 10 Uninstall

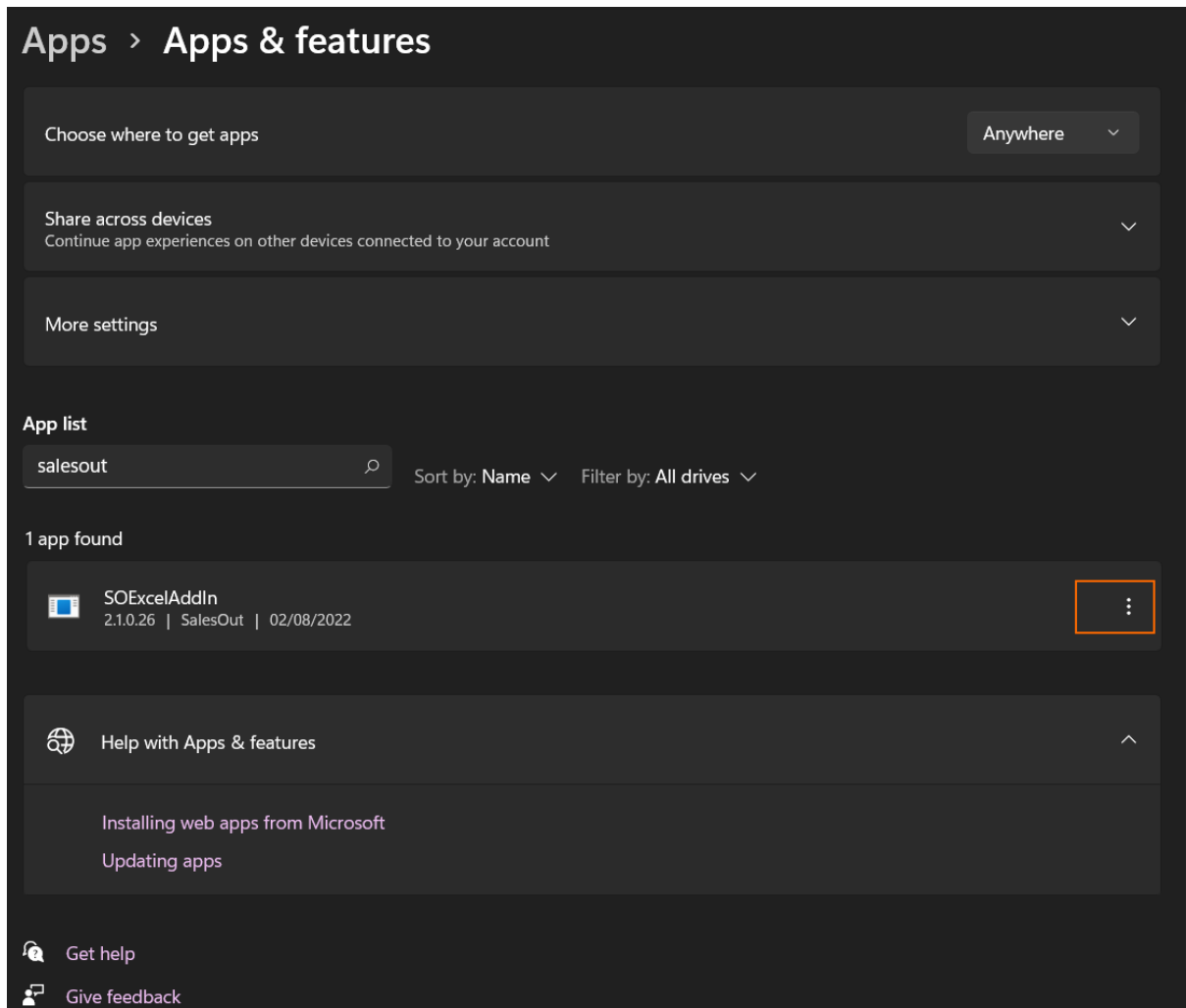
- Right click on the Windows logo in your taskbar
- Select Apps and Features
- Find SOExcelAddin
- Click Uninstall



Go to [Clear temporary data](#)

Windows 11 Uninstall

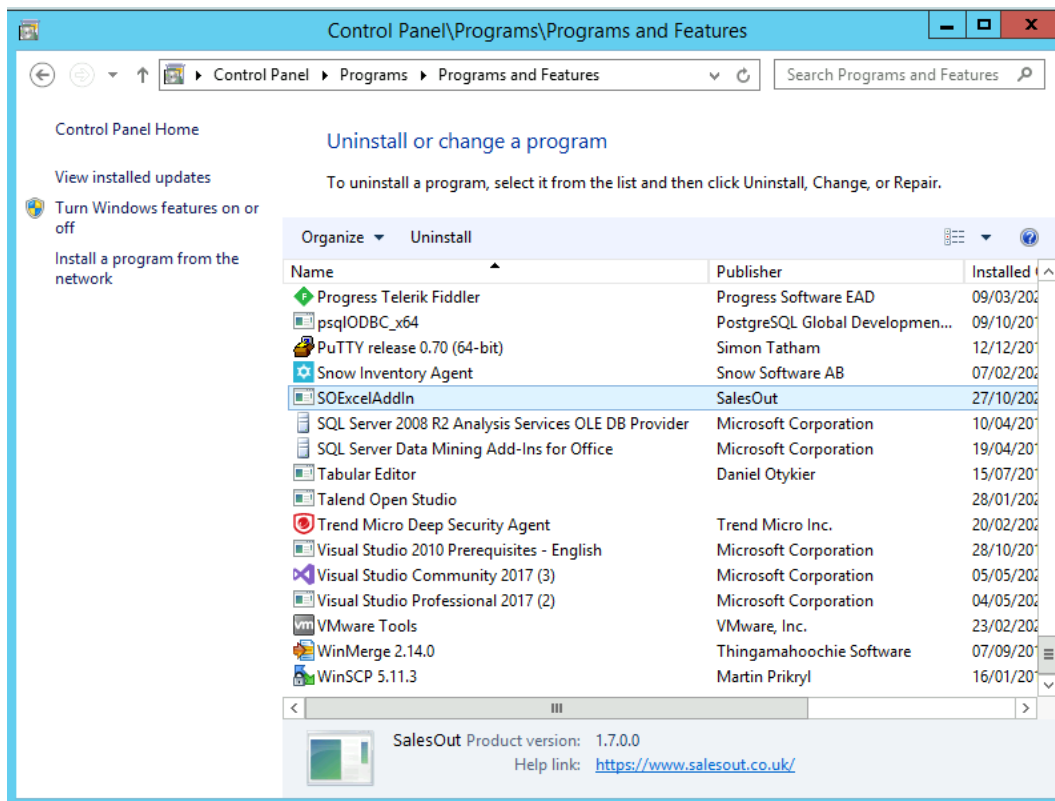
- Right click on the Windows logo in your taskbar
- Select Apps and Features
- Find SOExcelAddin
- Click the three vertical dots next to the entry
- Click Uninstall



Go to [Clear temporary data](#)

Windows Older Uninstall

- Right click the Windows logo, select Control Panel
- Under Programs, select Uninstall a program
- A list of installed programs will appear. You can sort by Name by clicking on the column heading
- Find SOExcelAddin (see below), right-click, Uninstall

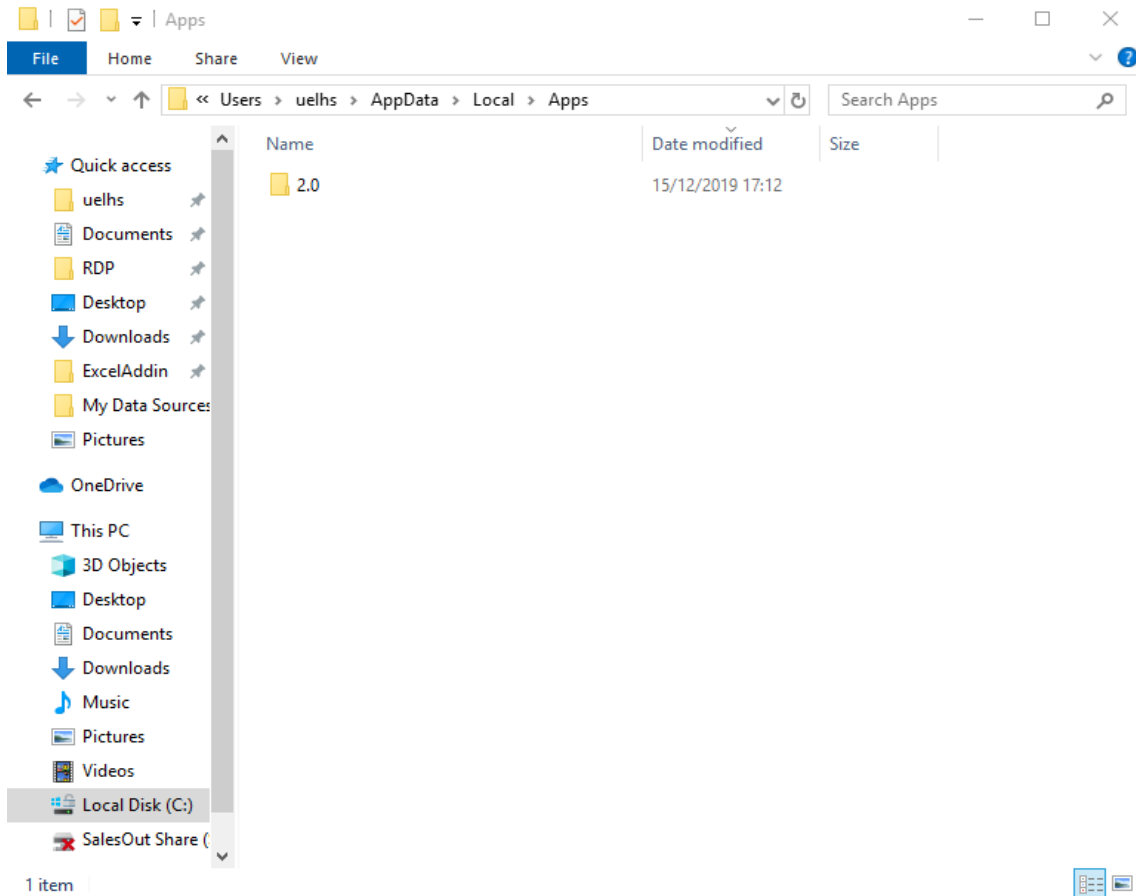


Go to [Clear temporary data](#)

3.5.3. Delete the temporary data folder

This should be the same in any version of Windows.

- Open Windows Explorer and in the address bar type “%AppData%\..\Local\Apps” and press enter
- Delete the folder called 2.0.



Go back and follow the steps from [Re-install](#)

4. Results

4.1. Everything is installed OK

Close this document and start using the Addin.

For future reference it is worth reading about [Updates](#).

4.2. Failed

Contact your SalesOut account manager