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 <u>cubes.salesout.co.uk</u>, the same site used to connect to SalesOut data.

2.1. Initial Install

This type of installation **<u>must</u>** be done from Microsoft Edge browser.

2.1.1. Download

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



Open this file?

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

Report file as unsafe



Microsoft Office C The Microsoft O	ustomization Installer	`
Name: From:	SOExcelAddIn https://cubes.salesout.co.uk/SOExcelAddIn/SOExcelAddIn.vsto	Close

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 <u>step-by-step</u>.

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? <u>Yes</u> / <u>No</u>. If Yes then this is effectively an Update. The link will take you to that.

AutoSa	ave 💽 🛱 🏷 - 🖓 - 🗢	Book1 - Excel	
File	Home Insert Page Layout Form	ulas Data Review View Help <mark>SalesOut</mark> Tear	m
300 1.0.0.0	New Image: Constraint of the second	Pivot Table	MoveTable Image: Custom Groups Field List Duplicate Show Query Worksheet
	SalesOut Connections	Create SalesOut Queries	SalesOut Tools

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 <u>https://cubes.salesout.co.uk</u>

Did the Addin install successfully? <u>Yes</u> / <u>No</u>

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 <u>here</u>.

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 <u>Uninstall</u>.

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 <u>Internet Options</u> 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 <u>Internet</u> <u>Options</u> 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

		_ 0 X
🗇 🕘 🧔 about:blank	▷ - ㅎ 🖉 Blank Page	× û ☆ ŵ
	Trusted sites	Internet Options ? X
	You can add and remove websites from this zone. All websites in this zone will use the zone's security settings. Add this website to the zone: cubes.salesout.co.uk Add	General Security Privacy Content Connections Programs Advanced Select a zone to view or change security settings. Image: Security Settings Internet Local intranet Trusted sites Restricted sites
	Websites: Core.exevault.com *.ore.exevault.com *.statitics.gov.uk http://sbp.enterprisedb.com ttps://spitub.com Vesser.un.a.gov.exet.com Descrite cargo: subficter (bttp:) for all cities in this more	Trusted sites Sites This zone contains websites that you trust not to damage your computer or your files. You files. Sites You have websites in this zone. Security level for this zone.
	Close	Allowed levels for this zone: All
		Enable Protected Mode (requires restarting Internet Explorer) Oustom level Default level Reset all zones to default level
		OK Cancel Apply

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. <u>Clear temporary data</u> 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

Settings		
命 Home	Apps & features	
Find a setting	Realtek Audio COM Components	599 KB 20/11/2019
Apps	Realtek High Definition Audio Driver	
	() AT	20/11/2019
Ē Apps & features	SecureUSB	4.92 MB 05/12/2019
⊟ Default apps	• SimplySecure	9.40 MB
띠. Offline maps		05/12/2019
	Snip & Sketch	8.00 KB 20/11/2019
Apps for websites	SOExcelAddin	
□ Video playback	15.0.28	30/01/2020
	Mod	ify Uninstall
	Sticky Notes	8.00 KB
	TeamViewer 14	20/11/2015
		20/11/2019
	VLC media player	20/11/2019
		20/11/2015
	Microsoft Corporation	20/11/2019
	VP9 Video Extensions	8.00 KB
	Microsoft Corporation	20/11/2019
	Web Media Extensions Microsoft Corporation	16.0 KB 20/11/2019
	Webp Image Extensions	8.00 KB
	Microsoft Corporation	20/11/2019

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

Apps > Apps & features			
Choose where to get apps	Anywhere Y		
Share across devices Continue app experiences on other devices connected to your account	~		
More settings	~		
App list			
salesout $\begin{subarray}{c} \label{eq:salesout} \begin{subarray}{c} eq:saleso$			
1 app found			
SOExcelAddIn 2.1.0.26 SalesOut 02/08/2022	:		
Help with Apps & features	^		
Installing web apps from Microsoft Updating apps			
Ret help			
Give feedback			

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

Control Panel\Programs and Features				
🕞 💿 👻 🛧 🕅 🕨 Control P	Panel Programs Programs and Features	✓ C Search Programs and Feat	atures 🔎	
Control Panel Home	Uninstall or change a program			
View installed updates	View installed updates To uninstall a program, select it from the list and then click Uninstall, Change, or Repair.			
😌 Turn Windows features on or				
off	Organize 🔻 Uninstall	:= :=	- 🕜	
Install a program from the network	Name 🔺	Publisher	Installed (^	
inclusion.	Progress Telerik Fiddler	Progress Software EAD	09/03/202	
	💷 psqIODBC_x64	PostgreSQL Global Developmen	09/10/201	
	PuTTY release 0.70 (64-bit)	Simon Tatham	12/12/201	
	🜣 Snow Inventory Agent	Snow Software AB	07/02/202	
SOExcelAddIn SalesOut		SalesOut	27/10/202	
SQL Server 2008 R2 Analysis Services OLE DB Provider Microsoft Corporation		Microsoft Corporation	10/04/201	
SQL Server Data Mining Add-Ins for Office Microsoft Corporation		Microsoft Corporation	19/04/201	
Tabular Editor Daniel Otykier		15/07/201		
	💷 Talend Open Studio		28/01/202	
	Trend Micro Deep Security Agent	Trend Micro Inc.	20/02/202	
	💷 Visual Studio 2010 Prerequisites - English	Microsoft Corporation	28/10/201	
Visual Studio Community 2017 (3) Micros		Microsoft Corporation	05/05/202	
💷 Visual Studio Professional 2017 (2) Mice		Microsoft Corporation	04/05/202	
WWware Tools VMware, Inc.		VMware, Inc.	23/02/202	
😓 WinMerge 2.14.0 Thingamahoochie Software		Thingamahoochie Software	07/09/20' =	
Sa WinSCP 5.11.3 Martin Prikryl		16/01/20		
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	SalesOut Product version: 1.7.0.0 Help link: https://www.sa	lesout.co.uk/		

Go to <u>Clear temporary data</u>

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 <u>Updates</u>.

4.2. Failed

Contact your SalesOut account manager