

# SIGNIFLOW® SOFTWARE

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[www.signiflow.com](http://www.signiflow.com)

## Microsoft Add-ins:

The methods described below will be the same for each of the following Microsoft applications:

Desktop Applications:

- Microsoft Word 2019 and later (including Office 365)
- Microsoft Excel 2019 and later (including Office 365)
- PowerPoint 2019 and later (including Office 365)
- Outlook 2019 and later (including Office 365)

Office 365 for Web:

- Word 365
- Excel 365
- PowerPoint 365
- Outlook 365

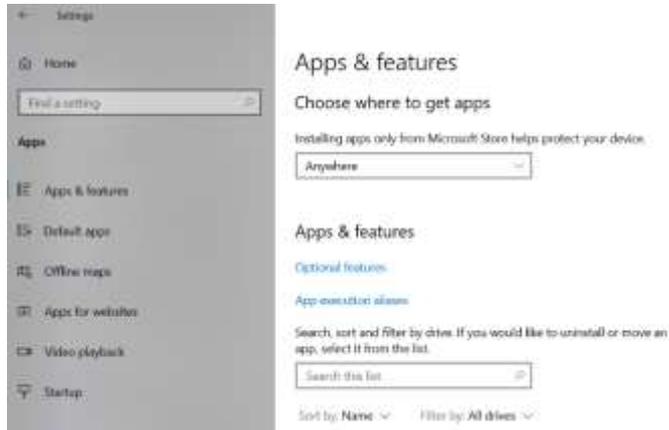
## Requirements for the Add-in

To use the SigniFlow for Microsoft Office Add-Ins, the user must have a SigniFlow account on at least one SigniFlow server.

## How to uninstall the old Add-in

The user will need to uninstall the entire old toolset (VSTO base toolset).

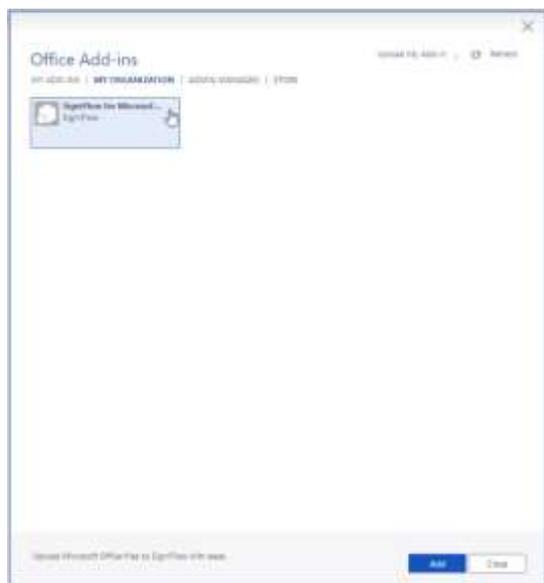
The user will need to navigate to their computer's Settings -> Apps -> Apps and features and then, find SigniFlow Toolset and follow the on screen prompts to uninstall the package.



## How to remove the Add-in

If necessary, a user can remove the SigniFlow Add-In from the Office Add-Ins page in their respective Microsoft Office application. More information relating to uninstalling an Add-In can be found here:

<https://support.microsoft.com/en-us/office/view-manage-and-install-add-ins-in-office-programs-16278816-1948-4028-91e5-76dca5380f8d>



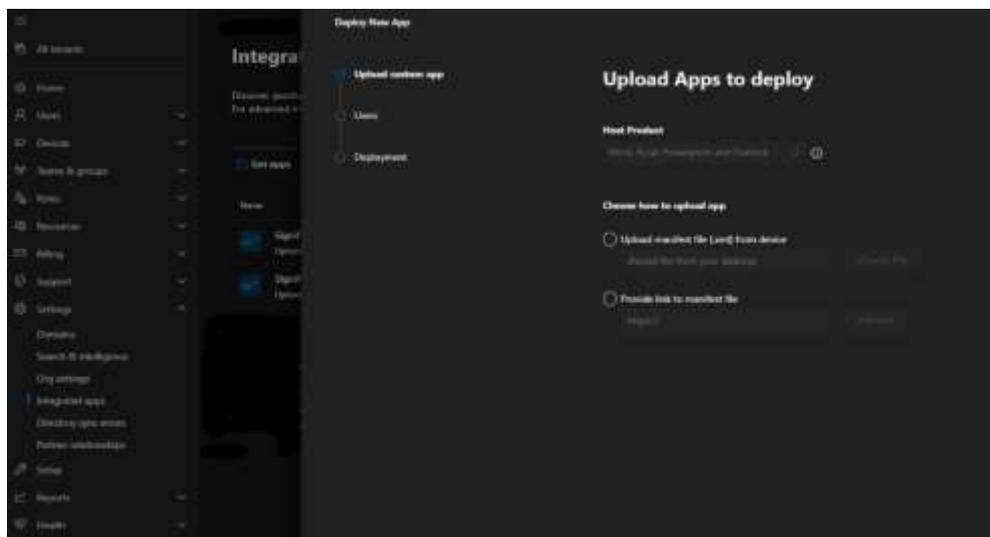
## How to install for business

The business' IT Admin will be responsible for enabling and applying the Add-in to all employees throughout their organization, for them to do this, they will first need to download the manifest file from the Software Download page, under the software tab in SigniFlow.

The manifest XML file required to enable the Add-ins can also be requested through [support@signiflow.com](mailto:support@signiflow.com) or downloaded from the software page in the user Profile tab on SigniFlow.

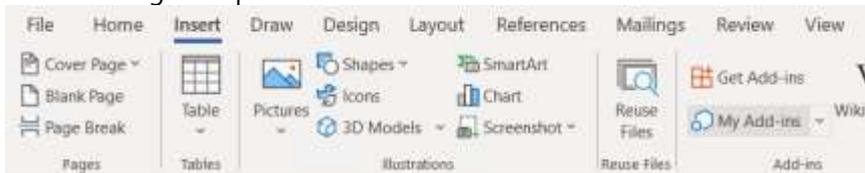
Once the manifest has been obtained your organizations IT Admin can then upload this manifest as a Microsoft Add-in and apply it as an organization wide Add-in for all users in your company.

For users who want to side load the Add-In more information can be found here: <https://docs.microsoft.com/en-us/office/dev/add-ins/testing/sideload-office-add-ins-for-testing#sideload-an-office-add-in-in-office-on-the-web>



## How to install for individuals under a business

First open the application you want to activate the SigniFlow Add-in on. The following example screenshots are all from Microsoft Word.



Click on the "Add-ins" tab under "Insert", this will open the Microsoft Office Add-ins Store. Your companies Admin user will be responsible for adding the Add-in to your Microsoft Office Organization tab or your Admin Managed tab under Add-ins.



Select the Add-in.

## How to use the Add-in

Once the Add-in has been added to your organization it will appear on the top left-hand corner of your menu. You can now use this Add-in to send documents for signature through SigniFlow.



After clicking on the "Send to SigniFlow" tab the following panel will open on your application:



Insert your email address and click on "Continue".



If you have an account on multiple SigniFlow servers, then a drop-down list will be displayed to allow you to choose which server you would like to use to workflow your document.



Once the server has been selected click on "Continue"



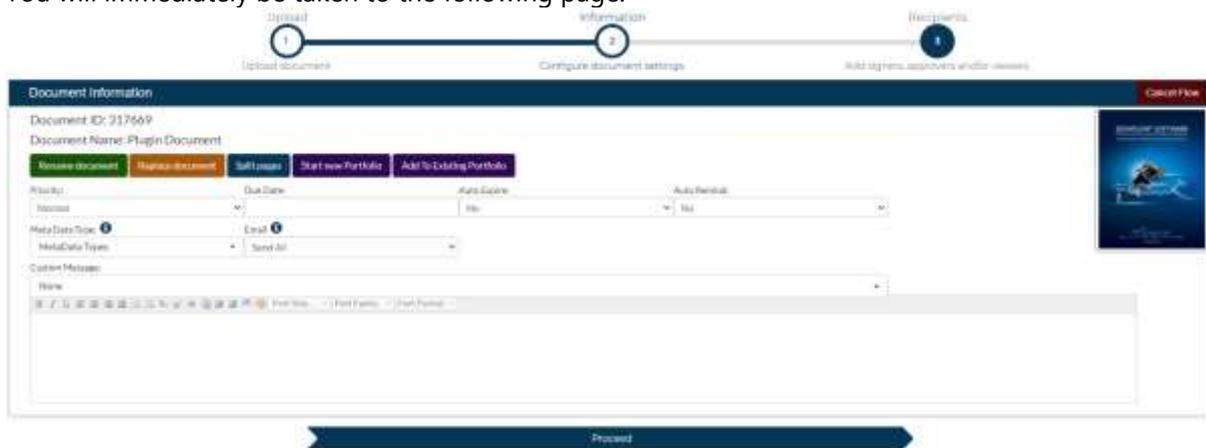
Enter your Log In credentials which is your email address as the username and your SigniFlow account password and click on "Log In".



Once logged in you can open your document in SigniFlow by clicking on "Upload Document", this will send your document to SigniFlow and start the workflow process.



You will immediately be taken to the following page:



You can then add participants to your workflow and send the document for signing.

If for any reason you were not able to log into SigniFlow after opening the document, then the document will be housed under your Drafts basket on your SigniFlow Dashboard.