





## Microsoft 365 add-in: Seamless workflow creation

SigniFlow's add-ins were designed to improve the workflow creation experience for our users by making it seamless, faster, and more practical.

SigniFlow for Microsoft 365 is a free add-in that enables users to directly send documents for signing in SigniFlow from Outlook, Word, Excel or PowerPoint.

## How SigniFlow for MS365 works

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:

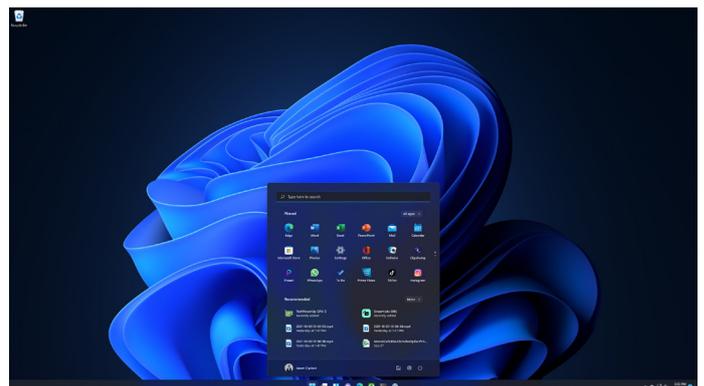
- Word 365
- Excel 365
- PowerPoint 365
- Outlook 365

### User requirements

To be able to make use of the SigniFlow for Microsoft 365 add-in, you need to:

1. Have a SigniFlow account on at least one SigniFlow server; and
2. Have a subscription to MS365; or
3. Have purchased MS Office'

**NOTE:** If you have the previous version of SigniFlow's MS365 add-in, you will need to uninstall this before installing the current version, as outlined below.\* If you do not have this, you can skip 'How to uninstall the old add-in' below and jump straight to the 'How to install' section.\*\*



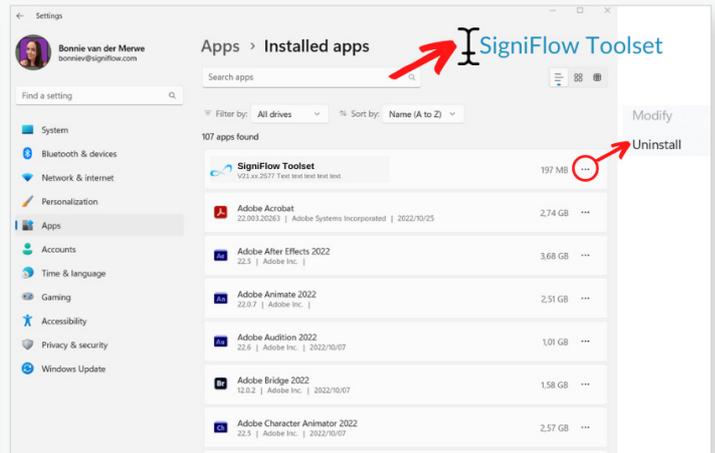
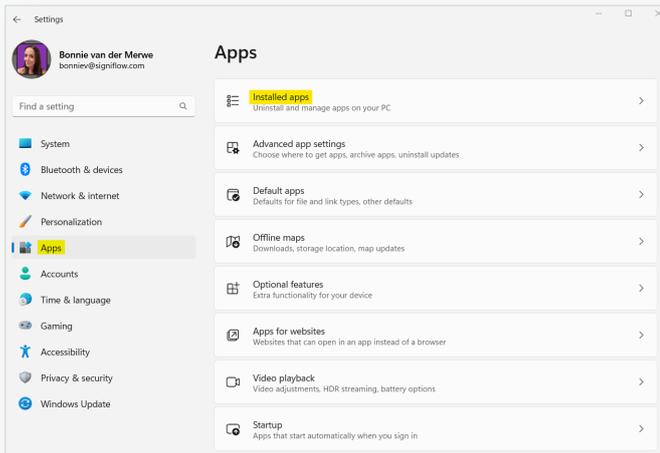


## How to uninstall the old add-in

To uninstall the former Microsoft add-in, you first need to uninstall the entire Visual Studio Tools for Office (VSTO) base toolset.

\*You can do this by following the steps below:

1. On your computer, navigate to Settings -> **Apps** -> **Apps & Features**
2. Locate the SigniFlow Toolset
3. Double click on 'SigniFlow Toolset' app (Windows 10) or on the three dots in the right-hand corner (Windows 11) and follow on-screen prompts to uninstall the package.



## How to remove the old add-in if required

If you need to remove the SigniFlow add-In from the Office add-Ins page in each respective Microsoft Office application, you can do so by following the steps in Microsoft's Support page on how to View, manage, and install add-ins in Office programs:

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

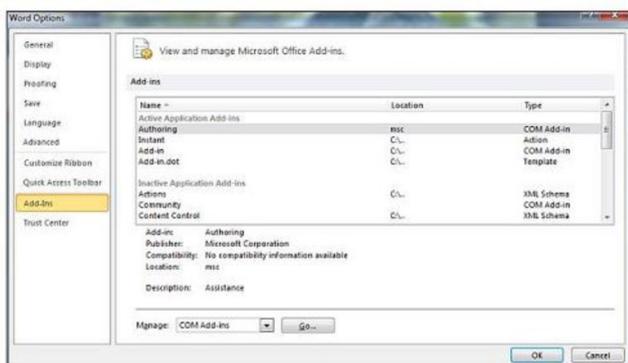
## View installed add-ins

1. Click **File > Options > Add-Ins**.
2. Highlight each add-in to see the add-in name, its publisher, compatibility, its location on your computer, and a description of its functions.

Microsoft 365

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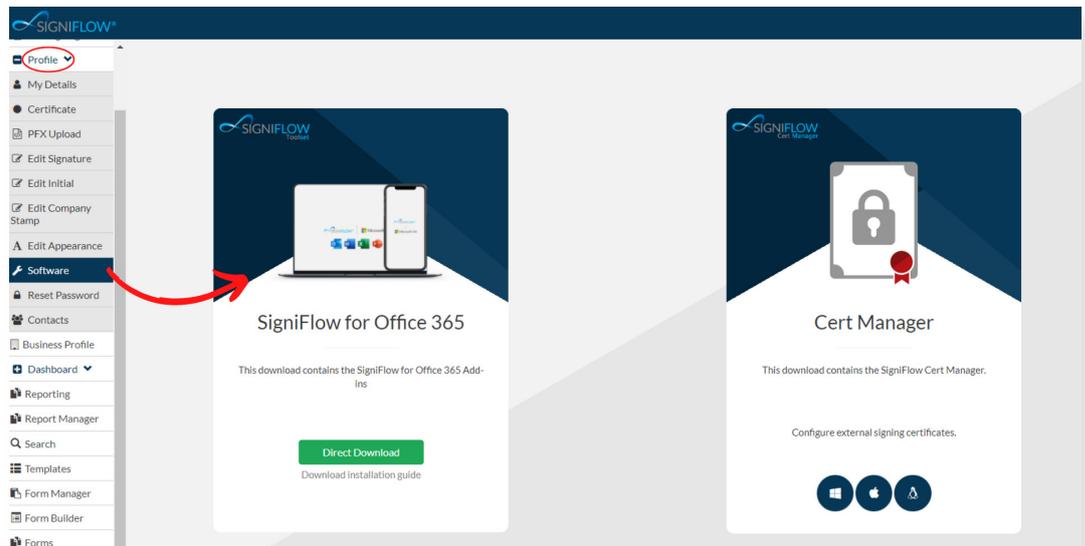
Start now





## How to install SigniFlow for MS365 for your business

1. The business's IT Administrator for SigniFlow will be responsible for enabling and applying the add-in for all employees in the organisation.
2. For employees to do this, they first need to download the manifest file from the Software Download page, under the Software tab in SigniFlow.
3. The manifest XML file required to enable the add-ins can also be requested via [support@signiflow.com](mailto:support@signiflow.com) or downloaded from the software page in the user Profile tab in SigniFlow.

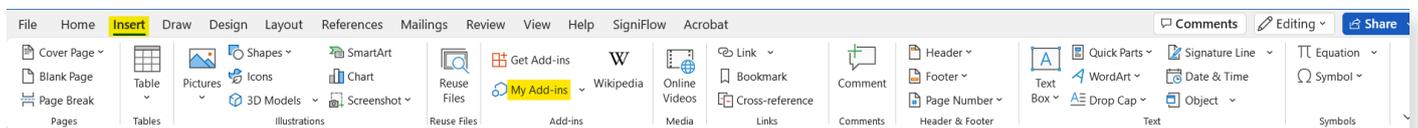


4. Once the manifest file has been obtained, your organisation's IT Administrator can upload it as a Microsoft Add-in and apply it as an organisation-wide add-in for all users in the company.
5. For users who want to side load the add-in more information can be found via Microsoft Learn: [Sideload Office Add-ins to Office on the web](#)

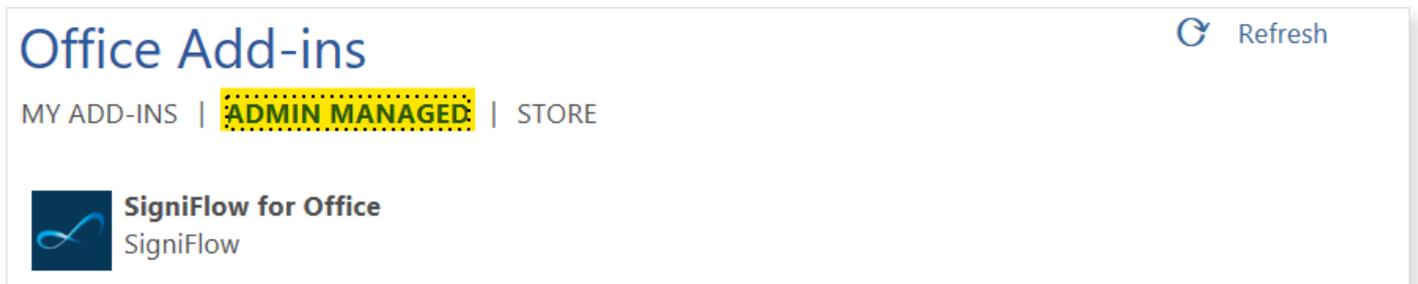


## How to install SigniFlow for MS365 for individuals under a business

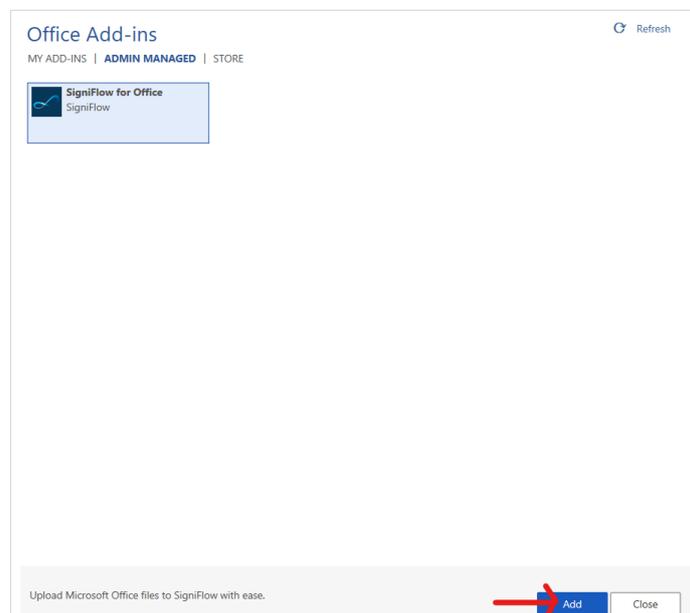
1. Open the application you want to activate the SigniFlow Add-in on. For the sake of this guide, we have used Microsoft Word, but all Office applications work on the same premise.
2. Click on 'My Add-ins' under the 'Insert' tab in your Microsoft Word toolbar.



3. The Microsoft Office Add-ins Store will open.
4. Your company's admin user will be responsible for adding the Add-in to your Microsoft Office organisation tab, or the 'ADMIN MANAGED' tab under Office Add-ins:



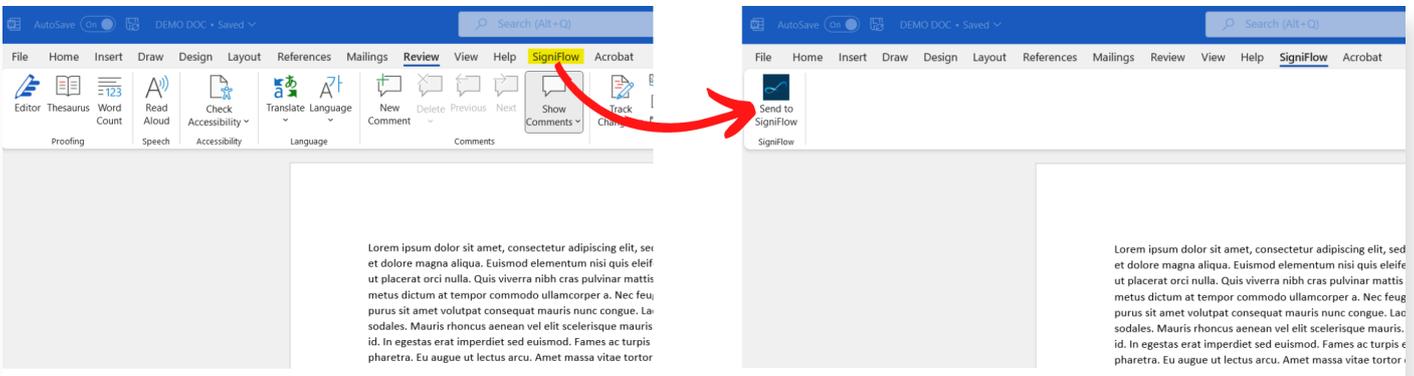
5. Select the SigniFlow for Office add-in.
6. Click 'Add'.



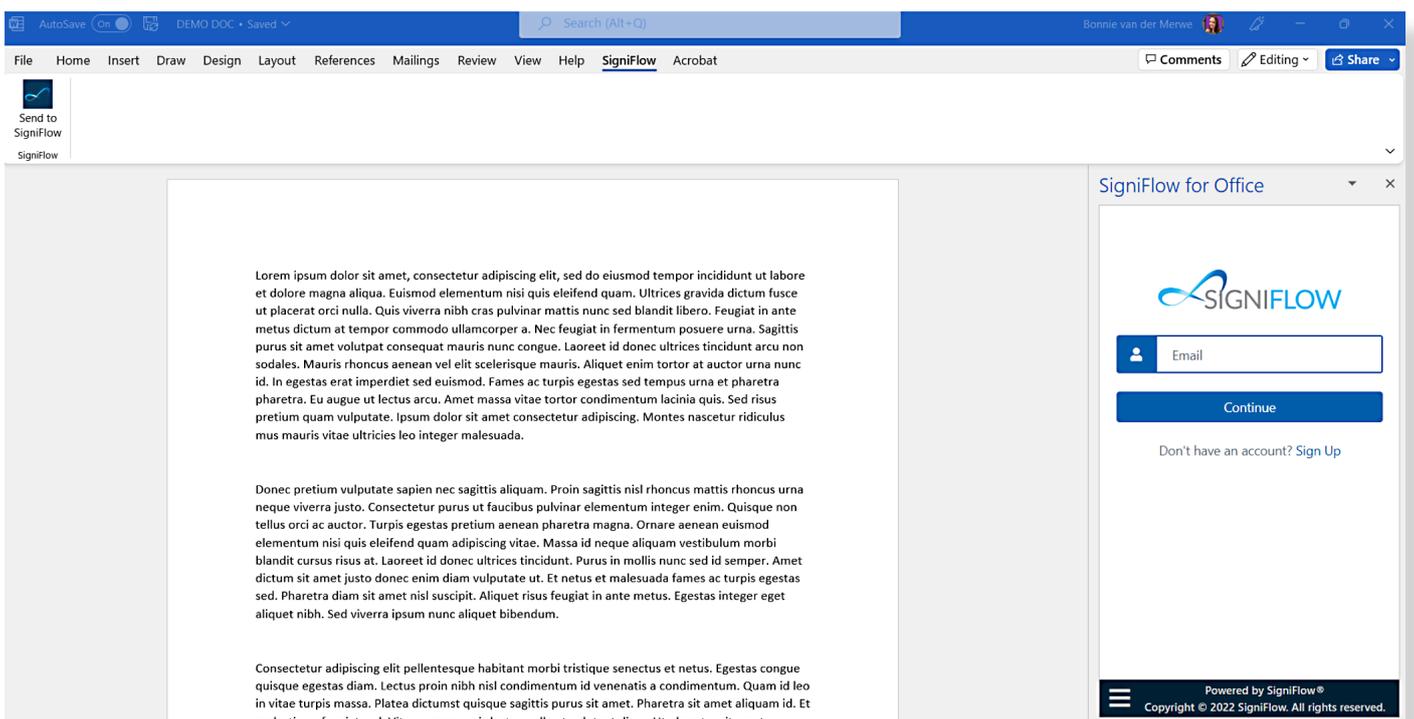


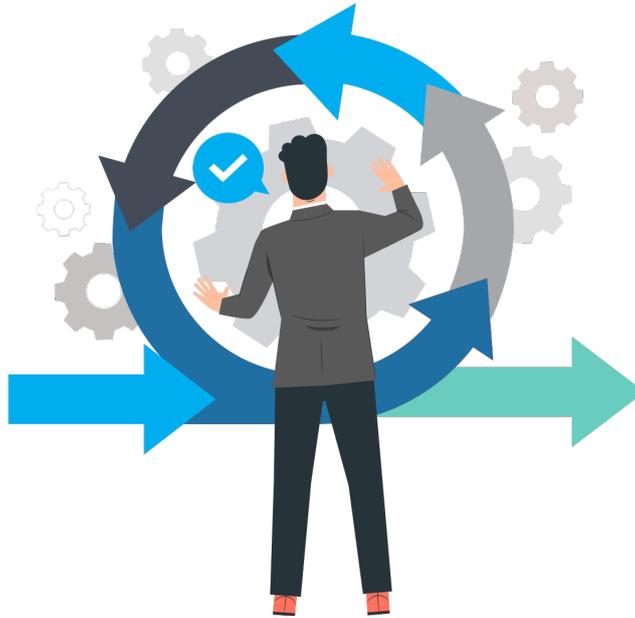
## How to use the SigniFlow for MS365 add-in

1. Once the add-in has been installed, it will appear in your toolbar.
2. Click on 'SigniFlow'.
3. You will now see a 'Send to SigniFlow' option in the top-left corner of your toolbar:



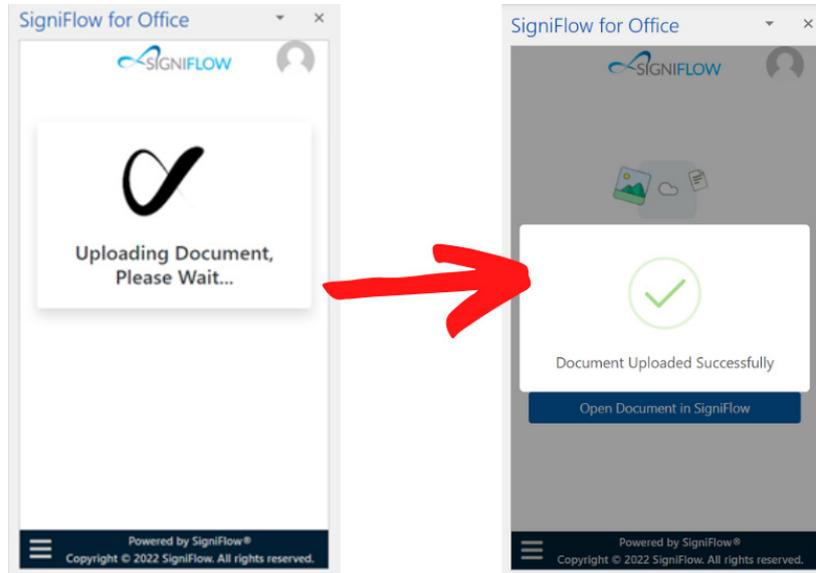
4. You are now ready to use the SigniFlow for MS365 add-in to send documents for signing directly from the relevant MS application, to SigniFlow.
5. After clicking on the 'Send to SigniFlow' tab, the SigniFlow for Office panel will open:



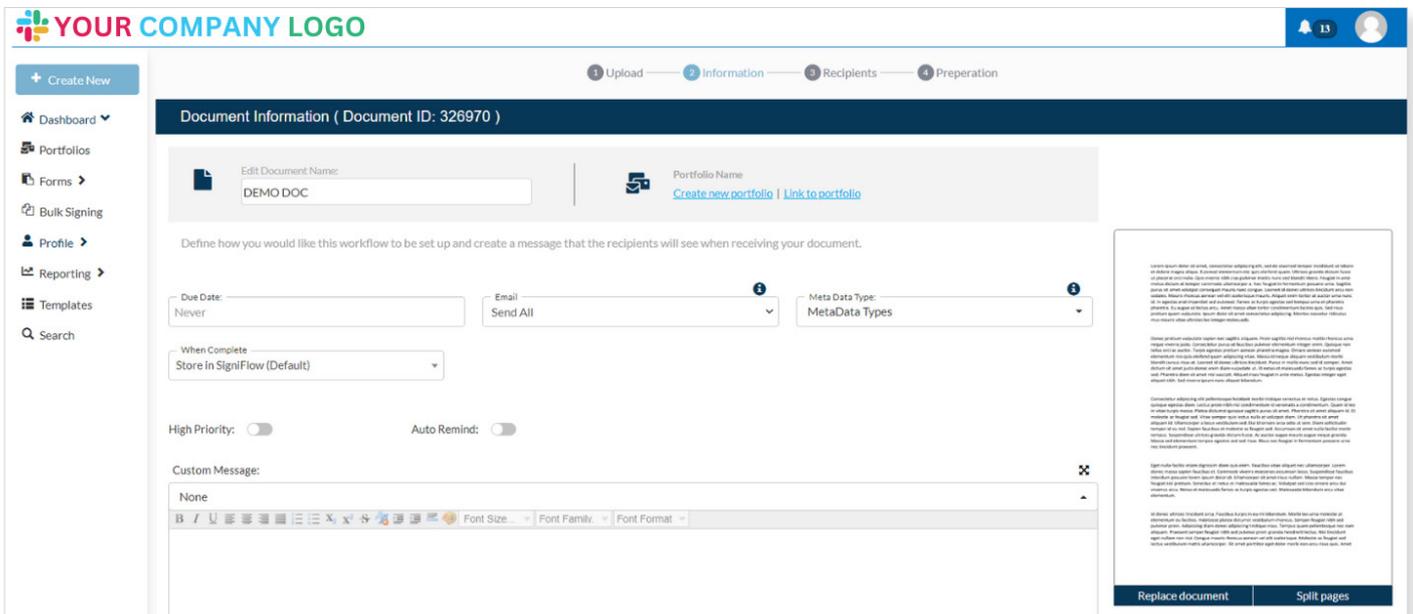


6. Enter your email address and click on 'Continue'.
7. If you have account on multiple SigniFlow servers, a drop-down list of these will be displayed to allow you to select which server you would like to use to workflow your document.
8. Click on your server of choice and then click on 'Continue'.
9. Enter your login credentials, i.e., your email address (Username) and your SigniFlow account password.
10. Click 'Log in'.
11. Once you are logged in, you can open your document in SigniFlow by clicking on 'Open Document in SigniFlow'.

The screenshot shows a PDF viewer window with a menu bar (File, Home, Insert, Draw, Design, Layout, References, Mailings, Review, View, Help, SigniFlow, Acrobat) and a toolbar (Comments, Editing, Share). A sidebar on the left contains a 'Send to SigniFlow' button. The main content area displays a document with three paragraphs of placeholder text. The right sidebar, titled 'SigniFlow for Office', features the SigniFlow logo, a user profile icon, and a central button labeled 'Upload Document to SigniFlow'. Below this button, text explains that uploading the document will open a preparation interface for signing. At the bottom of the sidebar is a blue button labeled 'Open Document in SigniFlow' and a footer with the text 'Powered by SigniFlow® Copyright © 2022 SigniFlow. All rights reserved.'



12. This will send your document to SigniFlow and start the workflow process.
13. You will immediately be taken to the following page:



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

**NOTE:** If, for any reason, you were not able to log into SigniFlow after opening the document, you will be able to find the document in your Drafts basket, which you can access via your SigniFlow Dashboard.