

# Excel Add-in Configuration & Installation Guide

## Vendor Payment & Bank Statement Manager – Plug and Play Setup

### 1. Node.js Installation & Setup

- 1 Step 1 – Download Node.js: Go to <https://nodejs.org> and download the LTS version for your OS.
- 2 Step 2 – Include in PATH: During installation, check 'Add to PATH'.
- 3 Step 3 – Verify Installation: Run 'node -v' and 'npm -v' in terminal.
- 4 Step 4 – Project Initialization: Unzip project folder → 'cd excel-vendor-payment-addin' → 'npm install'.
- 5 Step 5 – Run in Development Mode: Run 'npm start' (starts local HTTPS server <https://localhost:3000/>).
- 6 Step 6 – Build for Production: Run 'npm run build' (generates compiled files in /dist).

### 2. Yo Office Generator – Creating Excel Add-in Structure

- 1 Step 1 – Install Yeoman & Yo Office: 'npm install -g yo generator-office'.
- 2 Step 2 – Create New Project: 'yo office'.
- 3 Step 3 – Follow Prompts: Choose Project Type = Excel Add-in, Script Type = JavaScript, enter name & location.
- 4 Step 4 – Install Dependencies: 'cd vendor-payment-manager' → 'npm install'.
- 5 Step 5 – Run Dev Server: 'npm start' (Excel loads taskpane from <https://localhost:3000/taskpane.html>).
- 6 Step 6 – Edit Manifest: Open manifest.xml → update SourceLocation & DisplayName.
- 7 Step 7 – Sideload in Excel: Insert → Office Add-ins → My Add-ins → Upload My Add-in → select manifest.xml.
- 8 Step 8 – Verify Connection: Ensure the task pane loads in Excel successfully.
- 9 Step 9 – Switch to Production: Change SourceLocation to hosted HTTPS URL (<https://yourdomain.com/dist/taskpane.html>).

### 3. Plug-and-Play Usage

- 1 1. Unzip the project folder.
- 2 2. Run 'npm install' to install dependencies.
- 3 3. Run 'npm start' to launch the add-in locally.
- 4 4. Upload manifest.xml in Excel → Insert → Office Add-ins → My Add-ins → Upload My Add-in.
- 5 5. Start using Vendor Payment & Bank Statement Manager inside Excel.