

Yigcore Excel Add-in User Guide

Installation, activation, configuration, features, and troubleshooting - Public beta, June 2026

Version: Public beta, June 2026

This guide explains how to install, activate, configure, and use the Yigcore Excel Add-in. It is written for an end user installing the public beta, and for an IT admin deploying the same manifest to a Microsoft 365 tenant.

1. What The Add-in Does

Yigcore brings AI-assisted finance work into Microsoft Excel. You can ask questions about workbook data, draft formulas, prepare reviewed workbook changes, run finance-oriented workflows, and use in-cell AI formulas with your own model provider.

The add-in is human-in-the-loop. When Yigcore wants to write to a workbook, it shows a preview first. You decide what to approve, reject, or adjust.

The current public beta is Excel-first. PowerPoint and Word are not part of the current public beta install path.

2. Requirements

- Microsoft Excel 2019 or Microsoft 365 with Office add-in support.
- Permission to install Office add-ins, or a Microsoft 365 admin who can deploy the manifest.
- Internet access to <https://excel-addin.yigcore.com>.
- A Yigcore trial key or paid license key.
- An API key for your chosen AI provider, unless you use a local Ollama model.

The 30-day Personal trial does not require a payment card and does not auto-charge. After the trial, you can activate a paid Personal license or stop using the add-in.

3. Download The Manifest

1. Go to <https://www.yigcore.com/office-addins/download/>.
2. Enter the email used for your trial or purchase.
3. Accept the Privacy Policy and Terms.
4. Request the email sign-in code.
5. Enter the code and download the Excel manifest XML.

The manifest is the Office add-in install file. It does not contain your license key, trial key, payment token, or private data. Activation happens inside Excel after installation.

The user manuals can be downloaded freely from the Docs page or the download page. The manifest itself remains email-gated so it is not distributed without account context.

4. Install In Excel

Windows Or Mac Desktop

1. Open Excel.
2. Open a blank workbook or an existing workbook.
3. Choose Insert > Add-ins > My Add-ins.
4. Choose Upload My Add-in or Upload Custom Add-in.
5. Select the downloaded Yigcore manifest XML.
6. Confirm the install.
7. Open the Yigcore button from the ribbon.

Menu names vary slightly by Office version. If you cannot see Upload My Add-in, your tenant may restrict custom add-ins. Ask your Microsoft 365 admin to deploy the manifest centrally.

If Upload My Add-in Is Missing

If Excel shows a message such as "Please add or enable add-in catalogs from the Trust Center", the manifest is not necessarily wrong. It means this Excel install has no trusted add-in catalog enabled, or your tenant has hidden direct upload.

For an individual Windows desktop install, use a trusted shared-folder catalog:

1. Create a folder such as C:\YigcoreAddins or C:\Users\you\Documents\OfficeAddins.
2. Copy the downloaded Yigcore manifest XML into that folder.
3. Share the folder in Windows and give the share a simple name such as OfficeAddins.
4. Prefer the local loopback path for a single-machine install, for example \\localhost\OfficeAddins. This avoids issues with long \\PC\Users\... paths or computer names that contain spaces or non-ASCII characters.
5. In Excel, open File > Options > Trust Center > Trust Center Settings > Trusted Add-in Catalogs.
6. Add the shared folder network path as the Catalog URL. Do not paste a file:///...xml path and do not point Excel at the XML file itself.
7. Select Show in Menu for that catalog.
8. Close and reopen Excel.
9. Go to Insert > Add-ins > My Add-ins > Shared Folder, then choose Yigcore. The add-in does not appear under the My Add-ins tab until it has been added.

Before returning to Excel, test the catalog path in File Explorer or PowerShell. Opening \\localhost\OfficeAddins should show the Yigcore manifest XML. If it does not, the folder was not actually shared under that name, or your Windows sharing permissions are blocking access.

For security, keep this catalog folder small and read-only. Put only the Yigcore manifest XML in it, give your own Windows user read access, and do not grant write access to Everyone. The manifest does not contain your license key, payment information, or provider API keys.

If the Trust Center page is locked by policy, or if the computer is managed by a company, use Microsoft 365 Admin Center deployment instead of local sideloading.

On Mac, sideloading uses the Office web folder rather than the Windows Trust Center catalog. On Excel on the web, if Upload My Add-in is hidden, the practical path is admin deployment.

Excel On The Web

1. Open Excel from <https://www.office.com/>.
2. Open or create a workbook.
3. Choose Insert > Office Add-ins.
4. Upload the downloaded manifest XML.
5. Open the Yigcore command from the ribbon.

Excel on the web requires HTTPS access to the hosted runtime. Corporate network rules can block add-ins from loading external hosts.

Microsoft 365 Admin Center Deployment

For company deployment, an admin can upload the same manifest in Microsoft 365 Admin Center under Integrated apps or Custom apps. Assign it to the users or groups who should receive the add-in. Users then open Excel and find Yigcore in the ribbon after Office refreshes the deployment.

5. Activate Trial Or License

1. Open the Yigcore taskpane in Excel.
2. Go to Settings.
3. Open the License section.
4. Paste your trial key or paid license key.
5. Confirm activation.

If activation fails, check that you pasted the full key, that the email matches your trial or purchase, and that the key has not expired or been revoked.

6. Configure The AI Provider

Yigcore uses a bring-your-own-key model for AI inference. The provider is selected in Settings.

1. Open Settings.
2. Choose a provider such as OpenAI, Anthropic, Gemini, Mistral, GLM, KIMI, MiniMax, Qwen, DeepSeek, Ollama, or Custom Endpoint.
3. Enter the provider API key when required.
4. Optionally set a model name.
5. Optionally set a base URL for a regional endpoint, proxy, or OpenAI-compatible endpoint.

6. Enable function calling when your provider supports it.
7. Connect.

For Ollama, run the model locally first, then choose Ollama in Settings. Ollama normally does not need a cloud API key.

Taskpane chat keeps the provider key in memory for the current session. Cloud in-cell formulas use OfficeRuntime.storage so the Excel custom-functions runtime can access the provider key. Clear the API key field in Settings to remove that stored formula bridge.

7. Main Features

Workbook Chat

Select cells in Excel, then ask Yigcore what you need. Examples:

- Explain the trend in this table.
- Draft a formula for gross margin.
- Identify unusual rows in the selected range.
- Summarize this month-close variance.

Yigcore can read workbook context that you select or reference. It does not require uploading the workbook to a Yigcore server.

Reviewed Write Actions

When a request would change the workbook, Yigcore prepares actions for review. You can inspect the affected sheet, range, values, formulas, and formatting before approving. Nothing is written until you approve it.

AI Formulas

Use the YIGAI custom function in cells for prompt-based results. Typical patterns include classification, extraction, formula drafting, and text generation from nearby workbook context.

Formula results can be manually refreshed. Provider limits and workbook recalculation behavior still apply.

Finance Workflows

Depending on your license and feature availability, the add-in can support finance-focused workflows such as audit review, reconcile output, month-close variance review, and evidence-backed workbook summaries.

If a workflow needs more source data, Yigcore should ask for the missing input rather than writing incomplete output.

8. Security And Data Handling

- Workbook contents and provider API keys are not sent to a Yigcore inference server.
- AI provider calls are made from the add-in runtime to the provider you configure.

- The Yigcore account service handles trial, license, and manifest access.
- Write actions require human approval before workbook changes are applied.
- The manifest is shared; the license key controls product access.
- Clear provider settings before sharing a computer or handing off a workbook session.

Review your AI provider's own terms and data policy, because selected workbook context is sent to that provider when you ask Yigcore to analyze it.

9. Troubleshooting

The manifest will not upload

- Confirm the file is the downloaded XML manifest.
- Confirm your Office version supports custom add-ins.
- Ask your admin whether custom add-ins are blocked.
- If Excel says to add or enable add-in catalogs from the Trust Center, use the trusted shared-folder catalog steps above or ask your admin for centralized deployment.
- If a shared-folder catalog is listed but Yigcore is missing, open the Shared Folder tab, not the My Add-ins tab. Click Refresh, then restart Excel if needed.
- If the catalog path uses your computer name and does not work, create a simple share name and use `\\localhost\OfficeAddins`.
- If `\\localhost\OfficeAddins` opens but the add-in still does not appear, make sure the manifest XML is directly inside that folder, not inside a nested subfolder.

The taskpane is blank

- Confirm you can access <https://excel-addin.yigcore.com> in a browser.
- Check whether a corporate firewall blocks Office add-in runtime domains.
- Close and reopen Excel.
- Remove stale developer sideloads if you previously installed a localhost development manifest.

Provider connection fails

- Confirm the API key is valid.
- Confirm the selected provider and model match.
- Check whether the provider supports browser-based calls from the add-in.
- For local models, confirm Ollama is running.

The license key is rejected

- Confirm you copied the complete key.
- Confirm you are using the correct email account.

- Confirm the trial has not expired.
- Contact support if you recently purchased and the key still fails.

Formulas do not update

- Refresh the formulas manually.
- Confirm the provider is connected.
- Confirm the API key is still available in Settings.
- Check provider rate limits.

10. Support And Uninstall

For support, email support@yigcore.com. Include your Office version, operating system, whether you are using Excel desktop or web, and a short description of the steps that failed.

To uninstall a personal sideload, remove the add-in from Excel's My Add-ins area. For company deployment, ask your Microsoft 365 admin to remove the assigned custom app.

Do not send workbook data or provider API keys in support emails unless Yigcore support explicitly asks for a sanitized sample.