DNEXT

Harvesting Data, Growing Excellence

Excel Add-in User Guide

Table of Content

1. Overview

What is the DNext Excel Add-in?

The DNext Excel Add-in connects Microsoft Excel directly to your DNext platform, enabling seamless data management without switching between applications. Work with live platform data using familiar Excel tools.

What You Can Do

- **Download Data** - Pull datasets, productions, and trade matrices into Excel
- **Upload Data** - Push validated data back to the platform
- **Execute Workflows** - Run platform workflows directly from Excel
- **Create Templates** - Build reusable data entry forms

Benefits

- Work with DNext data in your preferred Excel environment
- Use Excel's full capabilities (pivot tables, charts, formulas) on platform data
- Streamline reporting and analysis workflows

---

2. Getting Started

Prerequisites

Before you begin, ensure you have:

- **Microsoft Excel**: Office 2016 or later, or Office 365 (Windows or Mac)
- **Operating System**: Windows 10/11 or macOS (latest two versions)
- **Internet Connection**: Required for all platform operations
- **DNext Account**: Valid username, password, and organization name
- **Administrator Rights**: Required for installation (Windows)

Quick Start Overview

Here's what you'll do to get started:

1. **Install the Add-in** → See 4.1 Installing the Add-in for detailed steps
2. **Connect to Platform** → See 4.2 Logging In for login instructions
3. **Start Using Features** → Explore 5. Main Features for available tools

✅ **First-Time Users**: Follow Section 4 step-by-step for installation and login

3. Key Concepts

💡 **Tip**: Understanding these concepts will help you use the add-in effectively.

Dataset

What it is: A structured collection of data stored in the DNext platform (e.g.,Supply & Demand, Customs , Cash Price)

Why it matters: Datasets are the primary data source you'll download, edit, and upload

Example: "Supply & Demand Corn World " containing columns for Date, Product, Item, Region and Value

---

Production

What it is: A configured view of agricultural or commodity data with forecasts and metrics

Why it matters: Productions contain analyzed data ready for reporting, with built-in calculations

Example: "US Soybean Production" showing area planted, yield, and total production by State

---

Trade Matrix

What it is: Import/export data organized by origin and destination countries

Why it matters: Visualizes trade flows and relationships between trading partners

Example: "Corn Tradeflow" showing which countries export corn to which destinations on a monthly basis

---

Workflow

What it is: An automated ETL process defined in the DNext platform that runs data operations

Why it matters: Execute Workflows on the platform directly from Excel without logging into the web interface

Template

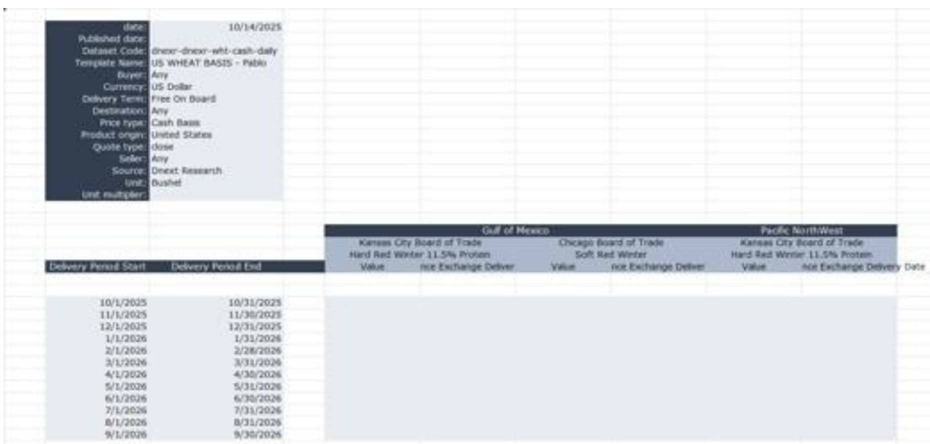
What it is: A pre-formatted Excel sheet structure linked to a dataset for data entry and upload

Why it matters: Ensures data consistency and validation before platform upload

Two Types:

- **Tabular Template**: Standard row/column format (flexible, most common)
- **Layout Template**: Pivoted format (for updating specific value fields)

Example: A Layout template for entering daily Wheat US Cash prices



date:	10/14/2025
Published date:	
Dataset Code:	dnexr-dnexr-wht-cash-daily
Template Name:	US WHEAT BASIS - Pablo
Buyer:	Any
Currency:	US Dollar
Delivery Term:	Free On Board
Destination:	Any
Price type:	Cash Basis
Product origin:	United States
Quote type:	close
Seller:	Any
Source:	Dnext Research
Unit:	Bushel
Unit multiplier:	

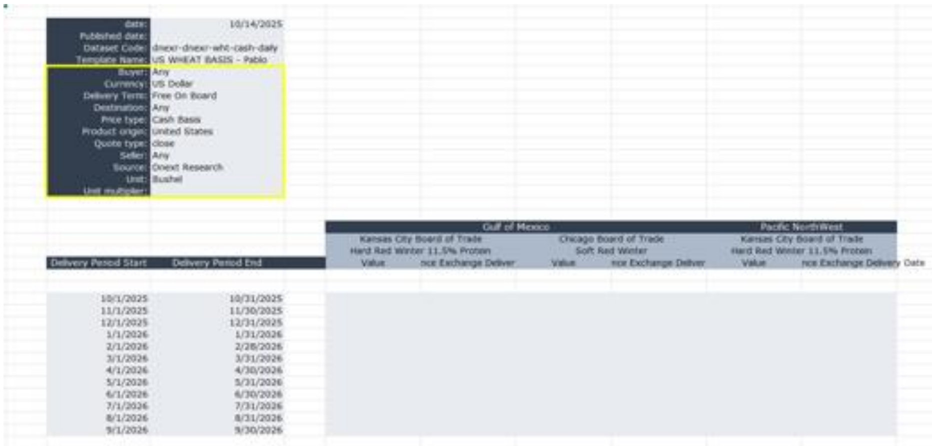
		Gulf of Mexico				Pacific NorthWest		
		Kansas City Board of Trade Hard Red Winter 11.5% Protein		Chicago Board of Trade Soft Red Winter		Kansas City Board of Trade Hard Red Winter 11.5% Protein		
Delivery Period Start	Delivery Period End	Value	nce Exchange Deliver	Value	nce Exchange Deliver	Value	nce Exchange Delivery	Date
10/1/2025	10/31/2025							
11/1/2025	11/30/2025							
12/1/2025	12/31/2025							
1/1/2026	1/31/2026							
2/1/2026	2/28/2026							
3/1/2026	3/31/2026							
4/1/2026	4/30/2026							
5/1/2026	5/31/2026							
6/1/2026	6/30/2026							
7/1/2026	7/31/2026							
8/1/2026	8/31/2026							
9/1/2026	9/30/2026							

Fixed Fields

What it is: Dataset fields with consistent values across all records in a template

Why it matters: Reduces repetitive data entry and ensures consistency

Example: If updating data only for with a Product Origin "United States" and currency "US Dollar", set **“Product_origin”** and **“Currency”** as fixed fields



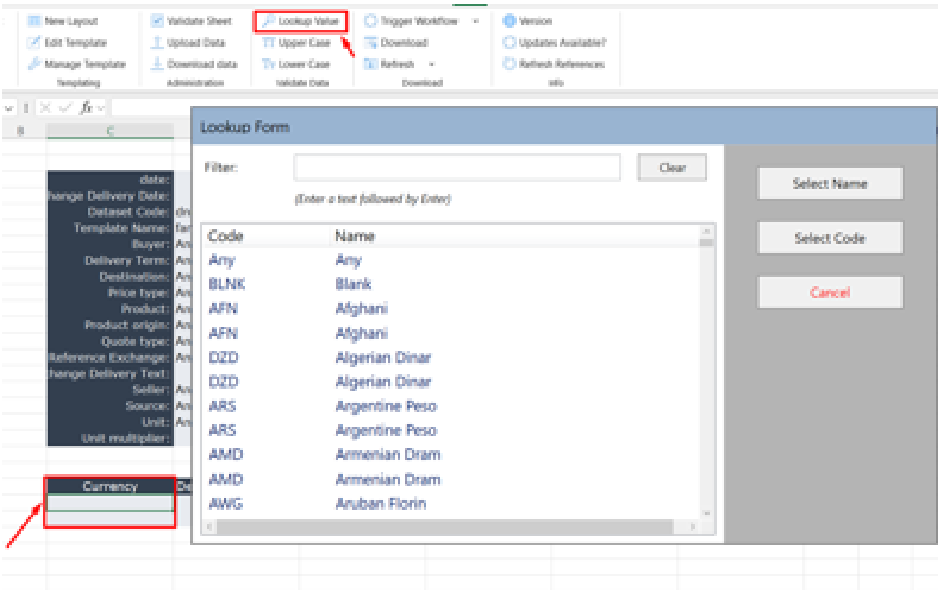
Reference Fields

What it is:
Fields that can only contain references to predefined, valid entries available on the platform, such as specific items, codes, or records from the platform’s database.

Why it matters:
Ensures data integrity by limiting input to valid references, which helps avoid data inconsistencies. While the platform won't reject invalid input at the point of entry, uploading such data will result in an error.

Example:
A **Product Code** field that only accepts product codes listed in the platform's product master list. If an invalid code is uploaded, it will trigger an error during the upload process.

How to view available references:
To view the list of available references, click on the cell aligned with the column where you want to input data, then click on the **"Lookup Value"** button.



Organization Name

What it is: The unique identifier for your DNext environment, found in your platform URL

Why it matters: Required for login; determines which data you can access

Example: If your URL is stage.dnext.io, your organization name is stage

---

4. Installation & Login

4.1 Installing the Add-in

Goal: Install DNext Excel Add-in on your computer **Time**: 5 minutes **Difficulty**: ☆☆☆☆☆

For Windows Users

Step 1: Download

1. Download setup.exe to your computer
2. Note the download location (usually Downloads folder)

✅ **Checkpoint**: File named `setup.exe` is saved on your computer

Step 2: Run Installer

1. Locate `setup.exe` in your Downloads folder
2. **Right-click** on `setup.exe`
3. Select **Run as Administrator**
4. If prompted by User Account Control, click **Yes**

⚠ **Important**: You must run as administrator or installation will fail

---

Step 3: Complete Installation

1. Follow the installation wizard
2. Wait for installation to complete (usually 1-2 minutes)
3. Click **Finish**

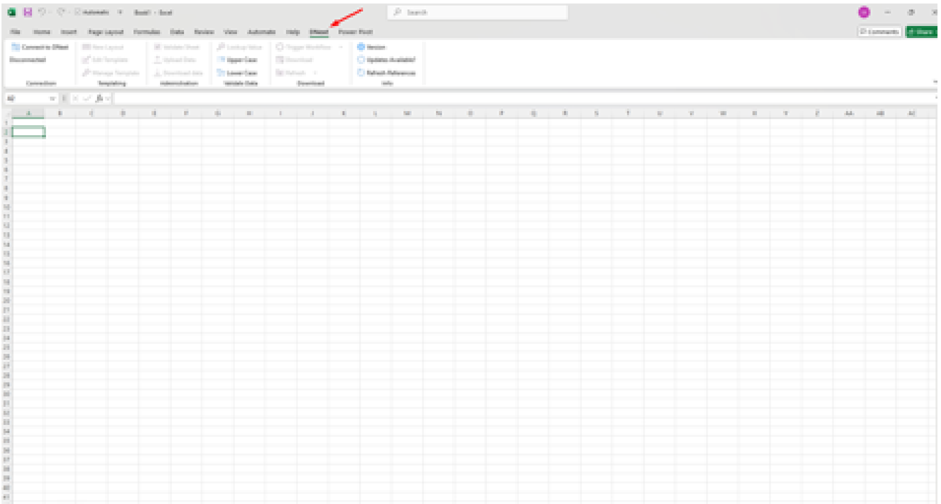
✅ **Checkpoint**: Installation wizard shows "Installation Complete" message

---

Step 4: Restart Excel

1. If Excel is open, close it completely
2. Open Excel again
3. Look for a new **DNext** tab in the ribbon

✅ **Success**: You should see the DNext tab between existing Excel tabs

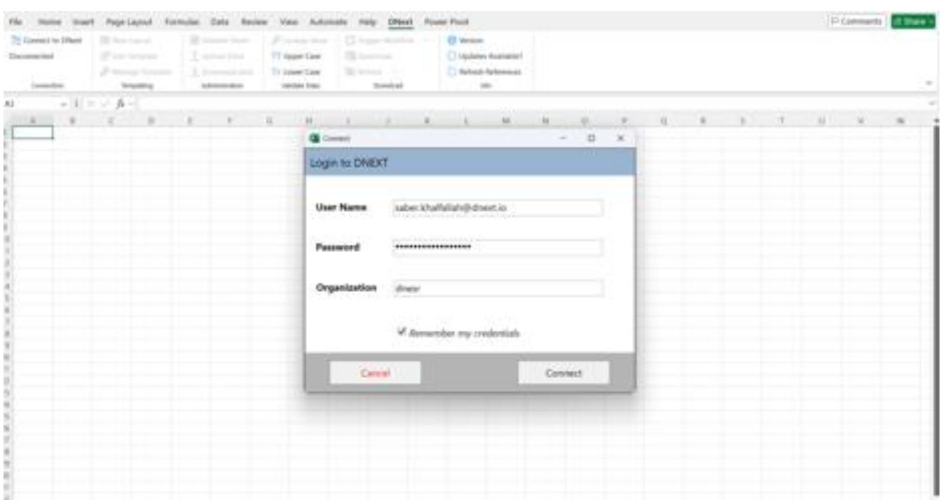


4.2 Logging In

Step 1: Open Connection Dialog

1. Open Excel
2. Click the **DNext** tab in the ribbon
3. Click **Connect to DNext** button (on the right side)

☑ **Checkpoint**: Login dialog window opens



Step 2: Enter Credentials

Fill in the following fields:

Field	What to Enter	Example
Username	Your DNext platform username	john.smith@company.com
Password	Your DNext platform password	••••••••
Organization	First part of your platform URL (lowercase)	stage (from stage.dnext.io)

⚠ **Common Mistakes**:

- Organization name must be **lowercase**
- Don't include .dnext.io in organization name
- Don't include https:// or www.

💡 **Finding Your Organization Name**:

- Look at your DNext platform URL in browser
- Format is: [organization].dnext.io
- Use only the [organization] part

Examples:

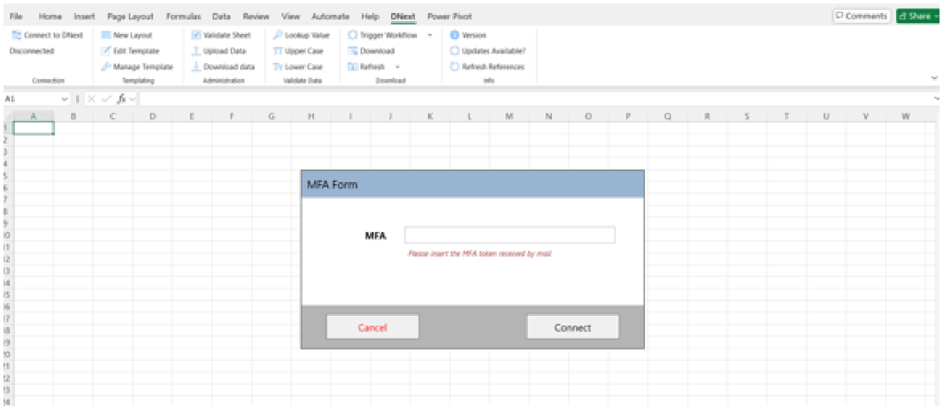
- URL: production.dnext.io → Organization: production
- URL: demo.dnext.io → Organization: demo
- URL: mycompany.dnext.io → Organization: mycompany

Step 3: Multi-Factor Authentication (MFA)

1. Click **Login** button
2. Check your email for MFA code
3. Enter the 6-digit code in the dialog
4. Click **Submit** or **Verify**

⚠ **MFA Code Not Received?**

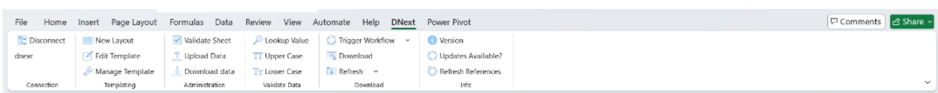
- Check spam/junk folder
- Wait 30-60 seconds (email may be delayed)
- Ensure email address in DNext profile is correct
- Click "Resend Code" if available



Step 4: Verify Connection

When login succeeds:

- ✅ All DNext ribbon buttons turn **black** (active)
- ✅ **Connect** button changes to show your organization name
- ✅ You can now use all add-in features



Staying Connected:

- Your session remains active while Excel is open
- If you close Excel, you'll need to reconnect next time
- Session may timeout after extended inactivity (requires re-login)

Disconnecting:

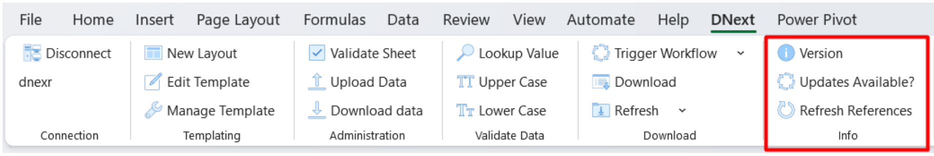
1. Click the **Connect** button (now shows organization name)
2. Select **Disconnect**
3. All buttons return to grey (inactive)

5. Main Features

5.1 Info Section

Purpose: Manage add-in version and reference data synchronization

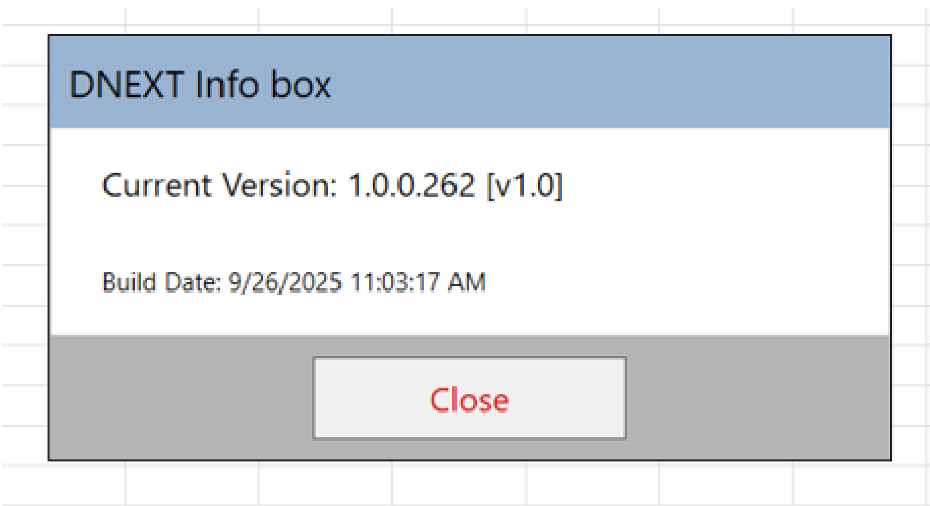
When to Use: Check for updates monthly or when experiencing issues



5.1.1 Version

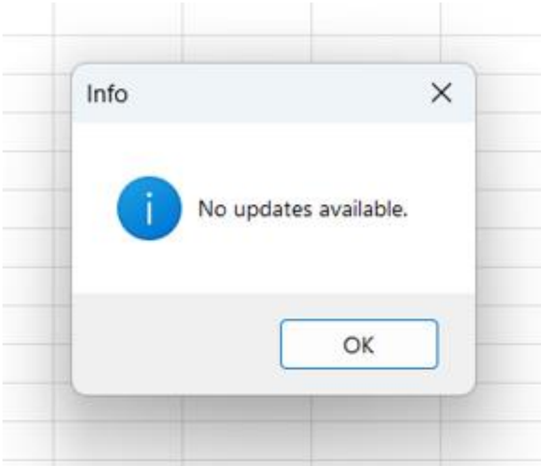
- **Location**: Info section, left side
- **Function**: Displays current add-in version number
- **How to Use**: Click to view version details
- **Why It Matters**: Helpful when reporting issues to support

Example Display:



5.1.2 Updates Available

- **Location**: Info section, center
- **Function**: Checks if newer version exists
- **How to Use**:
    1. Click **Updates Available**
    2. Dialog shows if a new version is available or not



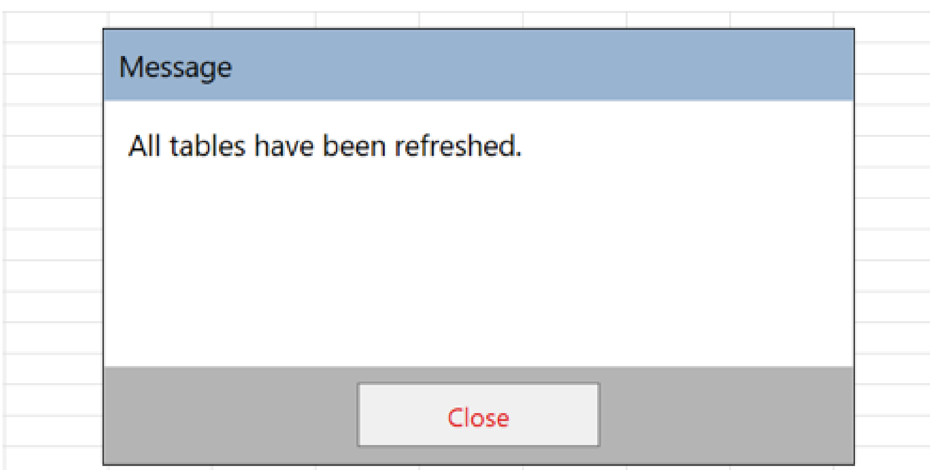
💡 **Best Practice**: Check for updates monthly to access new features and bug fixes

---

5.1.3 Refresh References

- **Location**: Info section, right side
- **Function**: Synchronizes reference lists with platform
- **How to Use**: Click to update all reference data
- **When to Use**:
    - After new products/locations added to platform
    - When references lists seem outdated

✅ **Success Indicator**: "References refreshed successfully" message appears

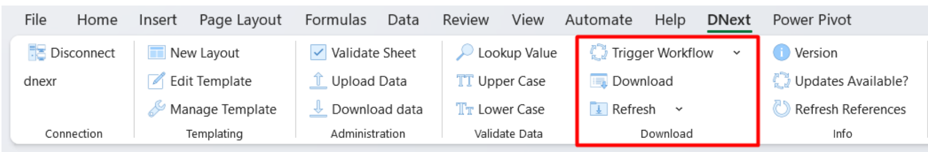


⚠ **Note**: This updates reference data, not your actual datasets. Use Download or Refresh for dataset updates.

5.2 Download Section

Purpose: Bring platform data into Excel for analysis and editing

When to Use: When you need to work with DNext data in Excel



5.2.1 Trigger Workflow

- **Location**: Download section, first button
- **Function**: Execute platform workflows directly from Excel
- **How to Use**:
  1. Click **Trigger Workflow**
  2. Select workflow from list
  3. Click **Execute**

Workflow Examples:

- running a python script to get new data from the web and add it to the dataset

💡 **Use Case**: Run your "Daily Prices" workflow while working in Excel instead of switching to the web platform

✅ **Success Indicator**: Red message on bottom left of the window displaying “your workflow is currently running” , then window close with no error message

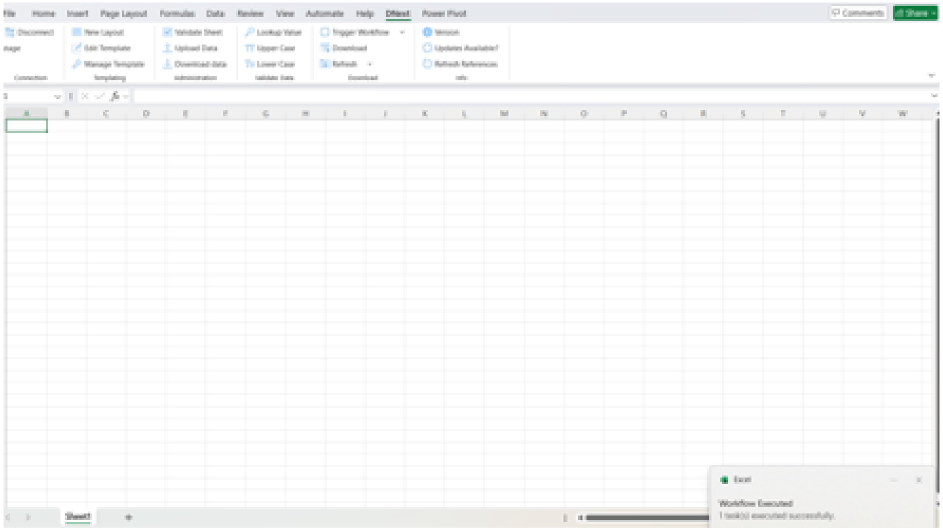
5.2.2 Run Last Workflow

- **Location**: Download section, second button
- **Function**: Re-execute the most recently triggered workflow
- **How to Use**: Single click executes immediately
- **When to Use**: When you need to run the same workflow repeatedly

⚠️ **Warning**: No confirmation dialog—executes immediately upon click

💡 **Shortcut**: Saves time when testing or running regular refresh workflows

✅ **Success Indicator**: a small notification on the bottom right of the screen



5.2.3 Download

- **Location**: Download section, center
- **Function**: Download data from Datasets, Productions, or Trade Matrices
- **How to Use**: See detailed guide in Section 6.1

Downloads From:

- ✅ Your environment's resources
- ✅ Resources shared with your environment

Data Types:

- **Datasets**: Raw structured data
- **Productions**: Analyzed agricultural/commodity data with forecasts
- **Trade Matrices**: Import/export flow data

5.2.4 Refresh

- **Location**: Download section, right side (dropdown button)
- **Function**: Update previously downloaded data
- **Options**:

Refresh Sheet:

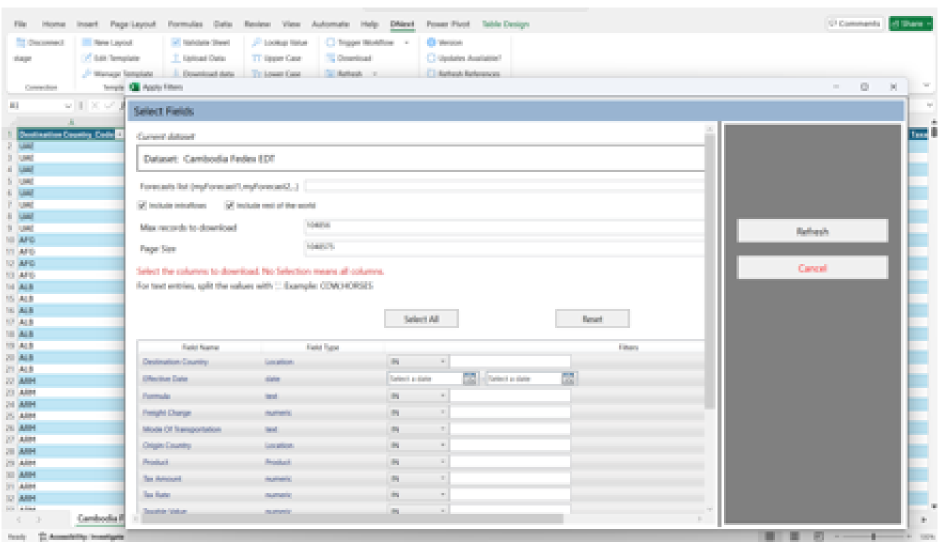
- Updates only the currently active sheet
- Fastest option
- Use when: Working on one sheet at a time

Refresh Workbook:

- Updates all sheets in the current Excel file
- Takes longer if many sheets
- Use when: Want all data synchronized

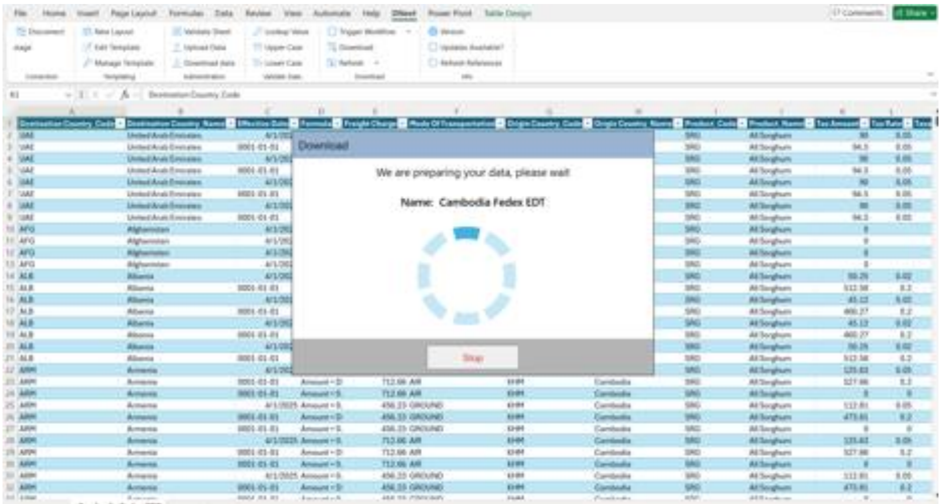
Refresh and Apply New Filters:

- Opens filter dialog before refreshing
- Allows you to modify filters/parameters
- Updates with new filter criteria
- Use when: Need to change date range or other filters



💡 **Best Practice**: Use "Refresh Sheet" frequently, "Refresh Workbook" at start/end of day

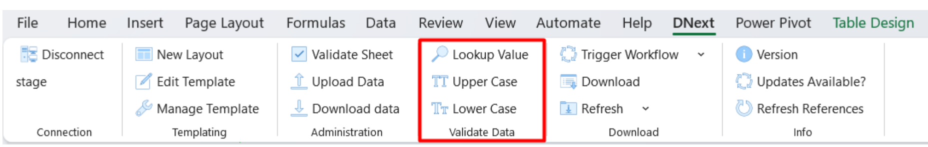
☑️ **Success Indicator**: Progress bar shows sheets being refreshed, and no error message afterward



5.3 Validate Data Section

Purpose: Check and format data to ensure quality before uploading

When to Use: Before uploading data to platform, or when cleaning data



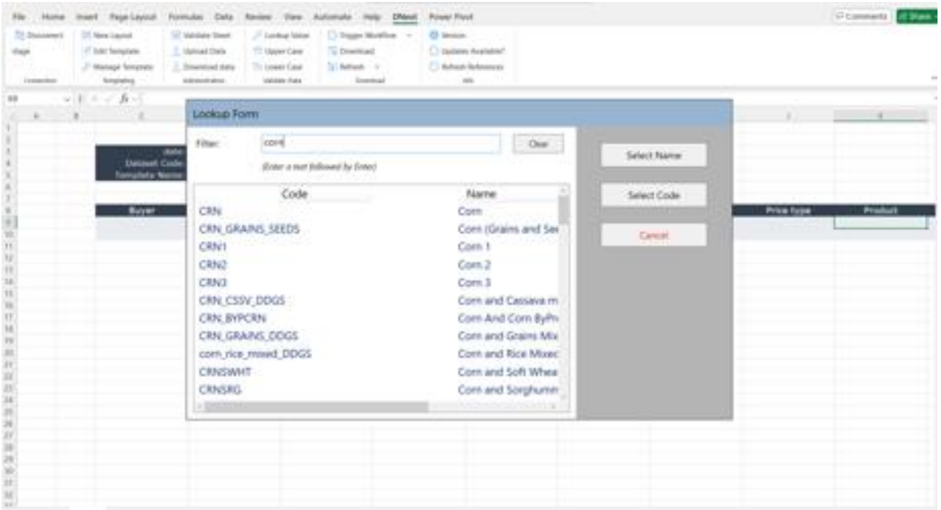
5.3.1 Lookup Value

- **Location**: Validate Data section, left button
- **Function**: Check valid references for a selected cell (⚠ Works only on Tabular Templates)
- **How to Use**:
    1. Click on a cell with a reference field
    2. Click **Lookup Value**
    3. Dialog shows all valid values for that field
    4. Select a value to populate the cell

Example:

- Click cell under "Product Code" column
- Click Lookup Value
- See list: CRN WHT, SBM
- Double-click to insert value

💡 **Prevents Errors**: Ensures you only enter values that exist in the platform



5.3.2 Upper Case

- **Location**: Validate Data section, center button
- **Function**: Convert text in selected cells to UPPERCASE
- **How to Use**:
    1. Select one or more cells
    2. Click **Upper Case**
    3. Text converts immediately

Example: product code → PRODUCT CODE

💡 **Use Case**: Standardize product codes, country codes, or IDs that must be uppercase

---

5.3.3 Lower Case

- **Location**: Validate Data section, right button
- **Function**: Convert text in selected cells to lowercase
- **How to Use**:
    1. Select one or more cells
    2. Click **Lower Case**
    3. Text converts immediately

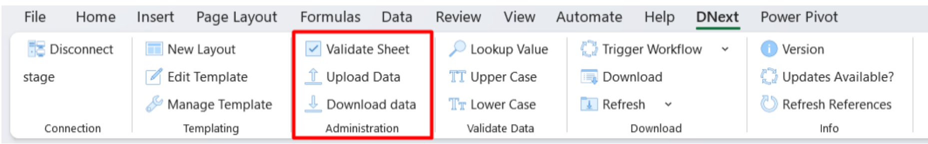
Example: UNITED STATES → united states

💡 **Use Case**: Standardize fields requiring lowercase

5.4 Administration Section

Purpose: Validate data integrity and manage uploads/downloads with templates

When to Use: Before uploading data or when downloading template-based datasets



5.4.1 Validate Sheet

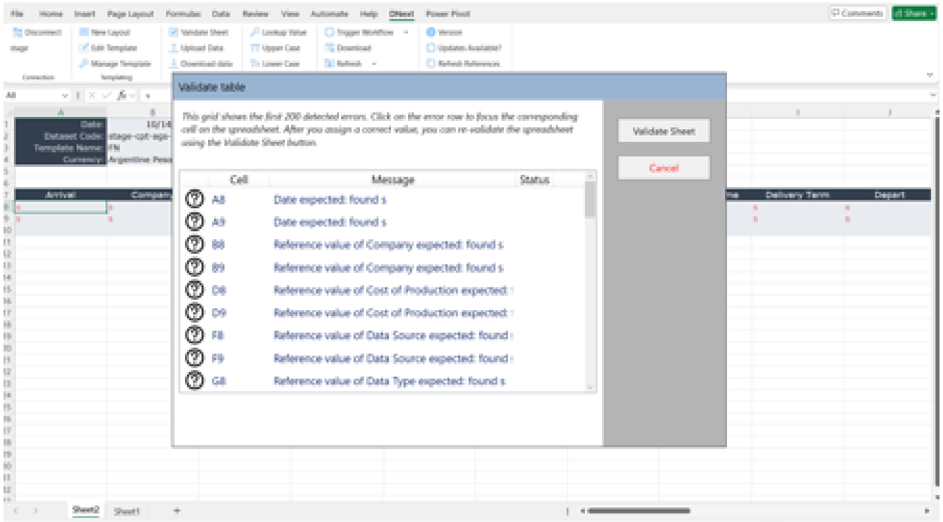
- **Location**: Administration section, left button
- **Function**: Scan sheet for errors before uploading to platform
- **How to Use**:
    1. Ensure you're on the sheet to validate
    2. Click **Validate Sheet**
    3. Review error report

What It Checks:

- Required fields not empty
- Reference values exist in platform
- Data types correct (numbers in number fields, dates in date fields)
- Field length limits not exceeded

Error Report Shows:

- Row number of error
- Column name
- Error description
- Up to 200 errors per validation



💡 **Best Practice**: Validate frequently while entering data, not just at the end

✅ **Success Indicator**: "No errors found. Sheet is ready for upload." message

⚠ **Note**: You cannot upload until all errors are fixed

5.4.2 Upload Data

- **Location**: Administration section, center button
- **Function**: Send data from your template sheet back to DNext platform
- **How to Use**:
    1. Complete data entry in template
    2. Validate sheet (must show no errors)
    3. Click **Upload Data**
    4. Confirm upload
    5. Wait for completion

⚠ **Note**: You can only upload data to datasets using “ExcelTemplate” as a trigger

Prerequisites:

- Sheet must be a valid template (Layout or Tabular)
- Sheet must pass validation (zero errors)
- dataset trigger must be “Excel Template”

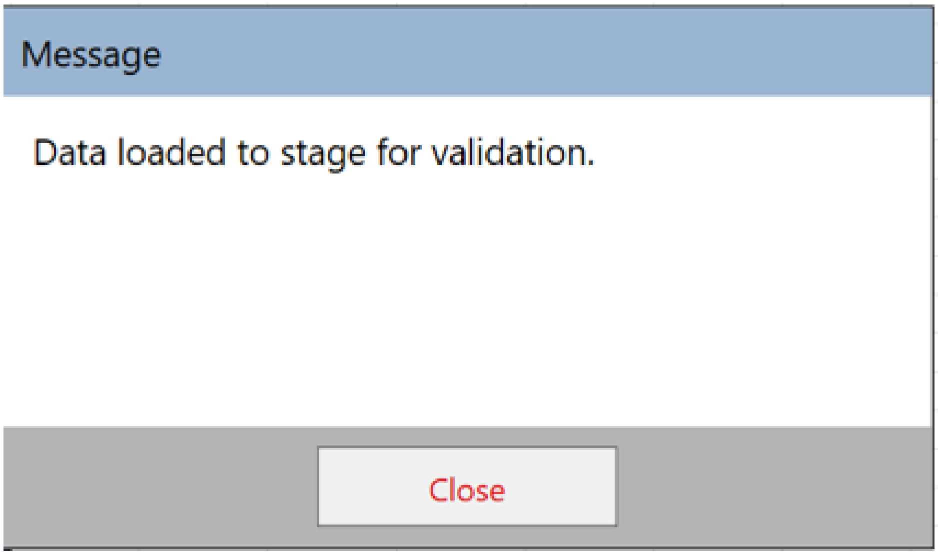
What Happens:

- Data is sent to platform
- Platform processes and integrates data

- Confirmation message shows records uploaded

⚠ **Warning**: Upload is immediate and cannot be undone from Excel. Ensure data is correct before uploading.

✅ **Success Message**: "Data loaded to [organization name] for validation"



5.4.3 Download Data

- **Location**: Administration section, right button
- **Function**: Download datasets marked with "CategoryExcelTemplate" in template format
- **How to Use**: See detailed guide in Section 6.2

Key Features:

- Filter by date range
- Choose download format:
  - **Tabular Form**: Standard row/column structure for editing
  - **Template Form**: Formatted template for data entry and upload

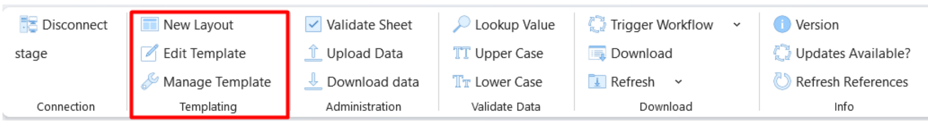
Difference from Download Section:

- **Download Section**: Any dataset, production, or trade matrix (read-only)
- **Administration Download**: Template-enabled datasets (editable, uploadable)

5.5 Templating Section

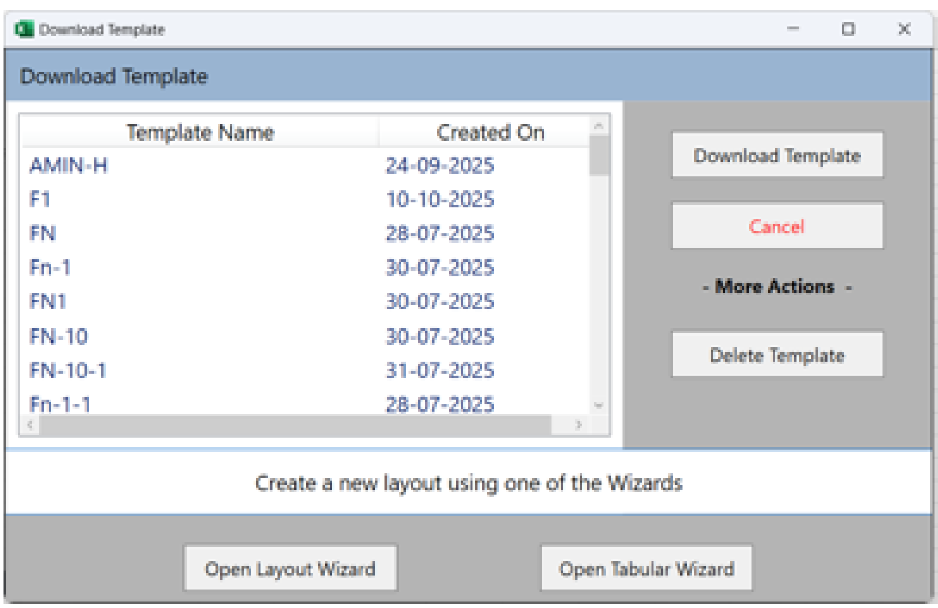
Purpose: Create, edit, and manage data entry templates

When to Use: When you need custom formats for data entry and upload



5.5.1 New Layout

- **Location**: Templating section, left button
- **Function**: Create new template or manage existing templates
- **How to Use**:
    1. Click **New Layout**
    2. Window shows available templates
    3. Choose action:
        - Download existing template
        - Delete template (if you created it)
        - Create new: **Open Layout Wizard** or **Open Tabular Wizard**



Template Types:

Type	Structure	Best For	Flexibility
Tabular	Row/column	Most use cases, multiple field editing	High
Layout	Pivoted format	Updating limited value fields with fixed dimensions	Low

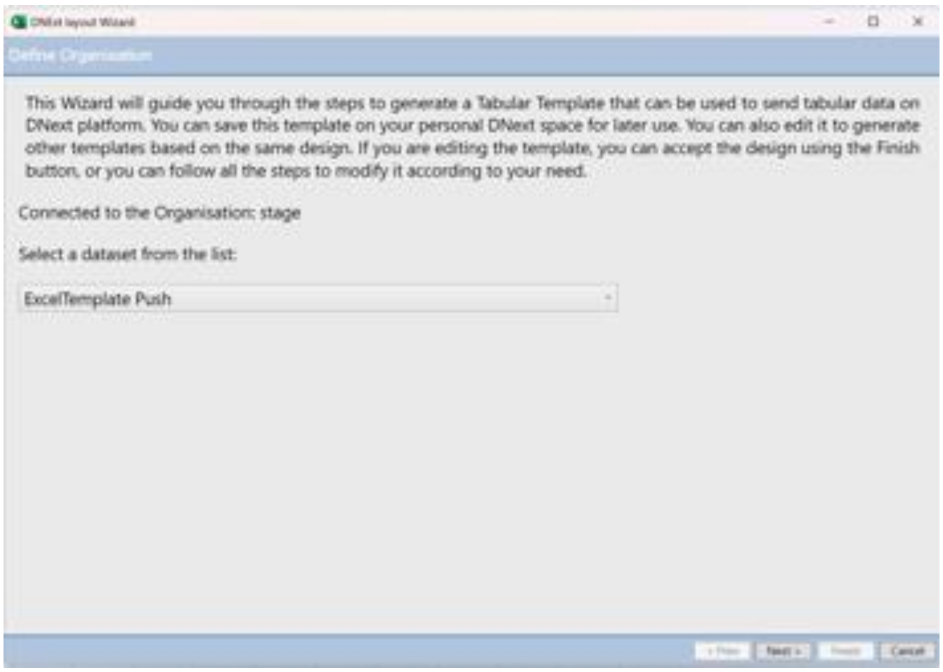
💡 **Recommendation**: Start with Tabular templates,they're more intuitive and flexible

---

Creating a Tabular Template (Open Tabular Wizard)

Wizard Step 1: Choose Dataset

1. Select dataset from dropdown list
2. Click **Next**

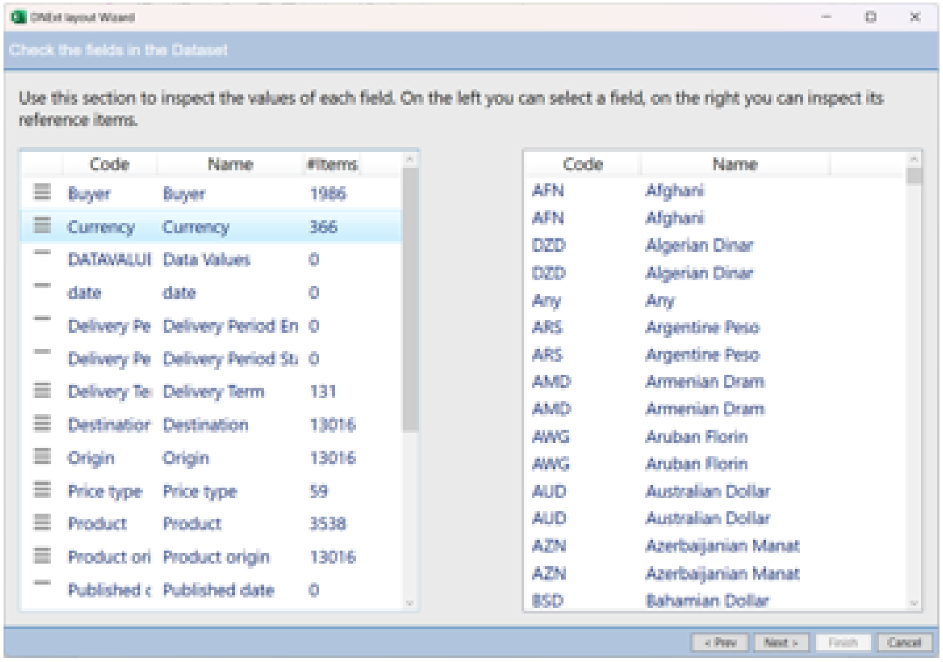


Wizard Step 2: Inspect Field Values

- **Left Panel**: Shows all dataset fields
- **Right Panel**: Shows reference values for selected field
- **Purpose**: Understand available values before configuring template

How to Use:

1. Click any field name on left
2. View its valid values on right
3. Note which fields have many vs. few values
4. Click **Next** when ready



💡 **Planning Tip**: Fields with few values are good candidates for Fixed Fields

---

Wizard Step 3: Define Fixed Fields

What are Fixed Fields? Fields that have the same value for all rows in your template

Why Use Them?

- Reduce repetitive data entry
- Ensure consistency
- Make template focused on specific data subset

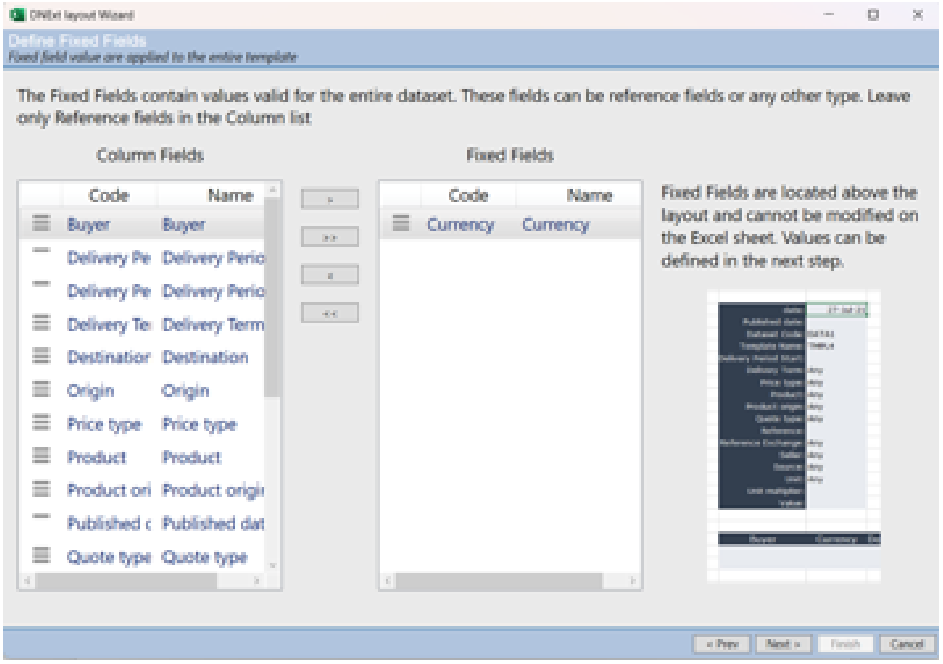
How to Configure:

1. Review **Columns Fields** list (left panel)
2. Select fields that should be fixed
3. Click arrow button to move to **Fixed Fields** (right panel)
4. Click **Next**

Example: If entering price data with same currency:

- Currency

→ Move "Currency" to Fixed Fields



Wizard Step 4: Define Values for Fixed Fields

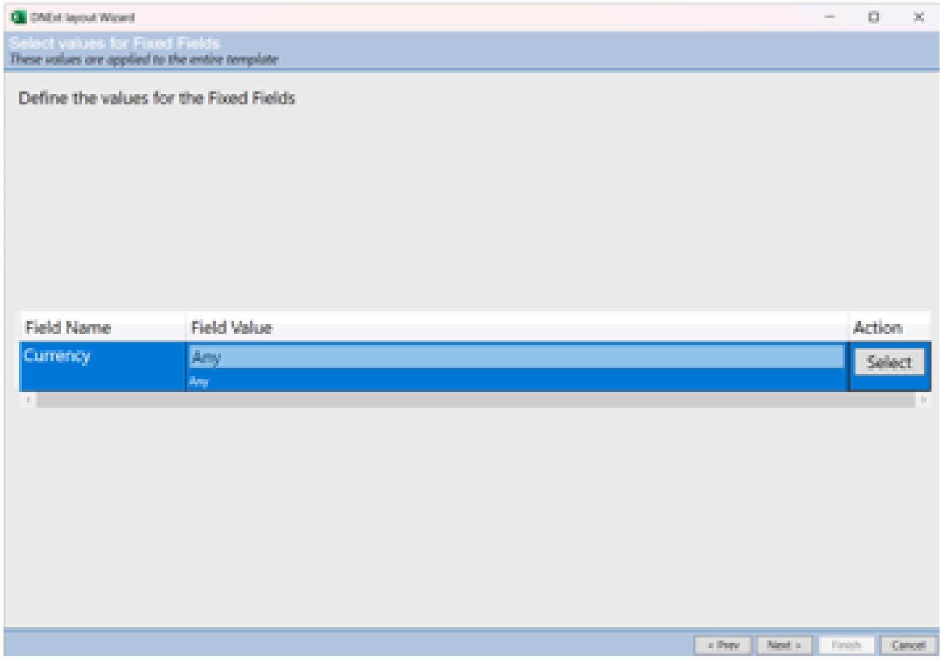
For each Fixed Field, specify its value:

1. Select Fixed Field from list
2. Choose value from dropdown or enter value
3. Repeat for all Fixed Fields
4. Click **Next**

Example:

- Currency= US Dollar

☑ **Checkpoint**: Every Fixed Field has a value assigned



Wizard Step 5: Define Column Hierarchy

Purpose: Determine the order of fields in your template columns

How It Works:

- Field order determines column grouping/nesting
- First field = outermost grouping
- Last field = innermost (most detailed)

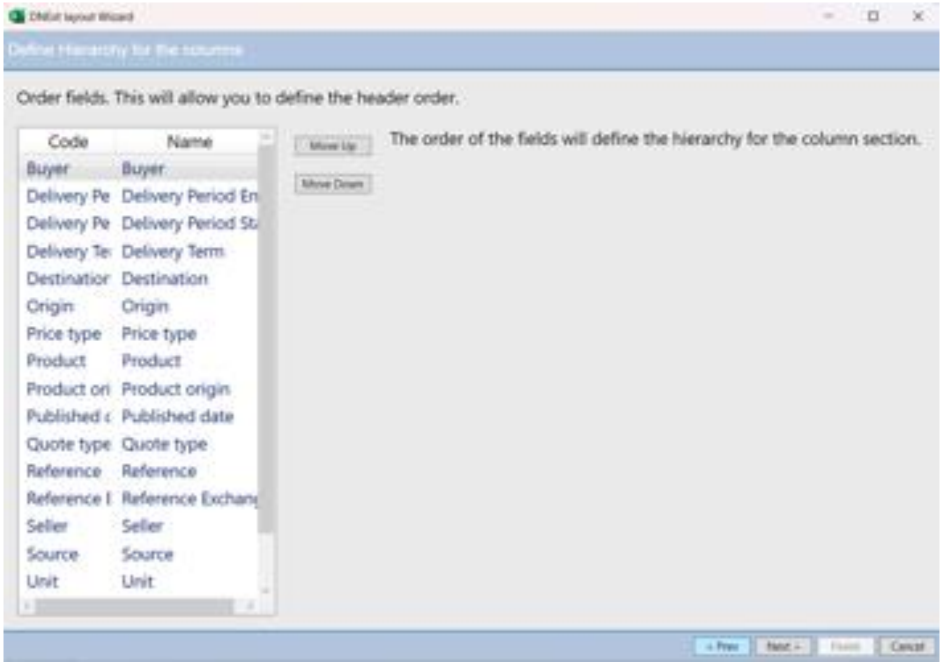
How to Configure:

1. Select Field
2. Click on the “Move Up” or “Move Down” Buttons
3. Preview shows resulting structure
4. Click **Next**

Example Hierarchy:

1. Product (outermost)
2. Region
3. Month (innermost)

Result: Columns grouped by Product, then Region, then Month



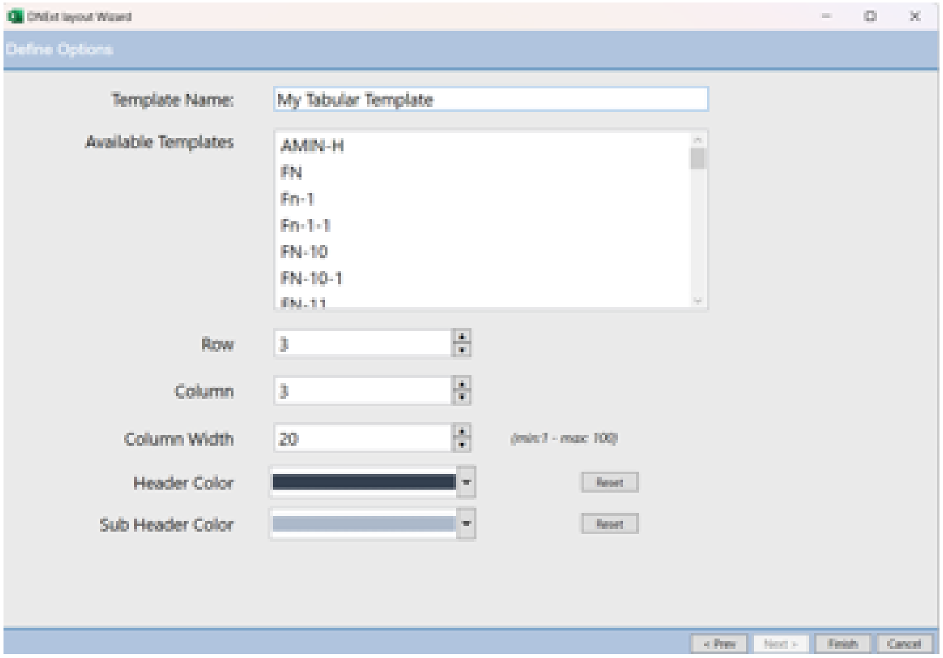
Wizard Step 6: Define Options

Configure template appearance and settings:

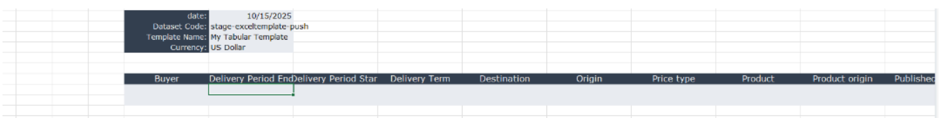
Option	Purpose	Recommendation
Template Name	Identifier for this template	Use descriptive name: "US Grains Entry 2025"
Number of Rows	Initial empty rows for data entry	put depending on typical data volume
Number of Columns	Calculated based on field hierarchy	Auto-calculated (read-only)
Column Width	Default width for all columns	15-20 works for most data
Header Color	Background color for column headers	Choose for visual distinction
Sub-header Color	Background color for sub-headers	Complementary to header color

Finalize:

1. Review all settings
2. Click on **Finish**
3. Template generates in new sheet



☑ **Success**: New sheet opens with your template structure ready for data entry



Creating a Layout Template (Open Layout Wizard)

Goal: Create a pivoted template for updating a specific value field **Steps**: 8-step wizard **Difficulty**: ☆☆☆☆☆

When to Use:

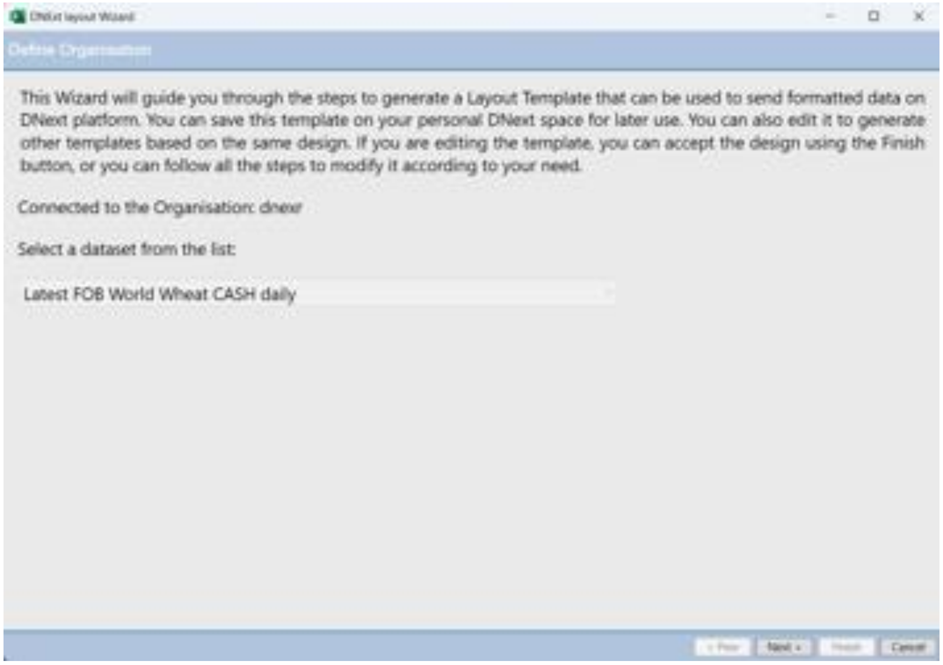
- Updating only chosen value fields (e.g., Basis Cash Price Values and Reference Exchange Delivery Date)
- Multiple Fixed Fields narrow focus
- Data naturally fits pivoted view

⚠ **Note**: Layout templates are more restrictive than Tabular. Use only when pivoted format is clearly better.

Wizard Step 1: Choose Dataset

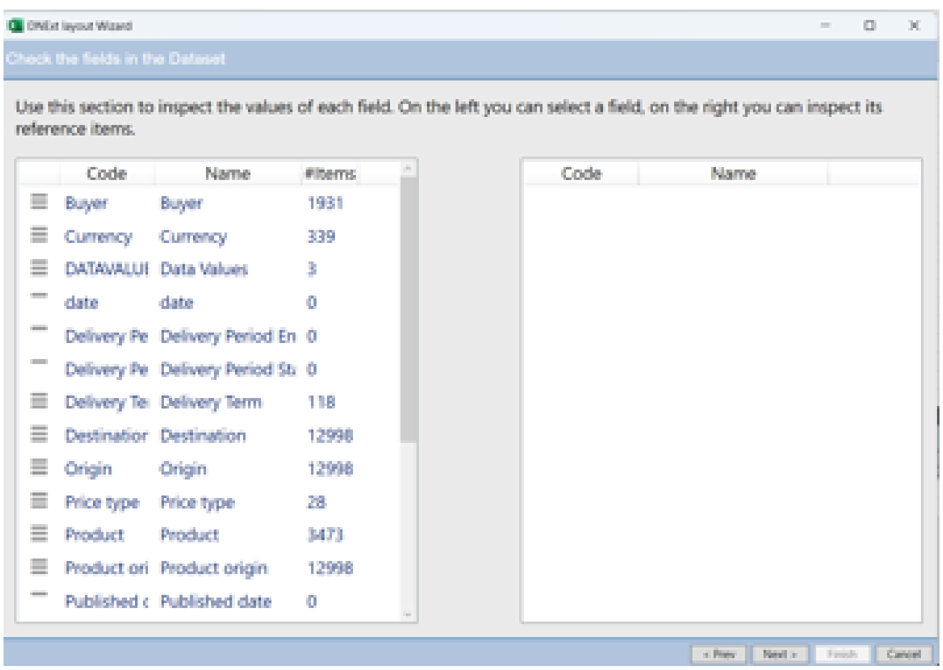
- Same as Tabular Wizard

- Select dataset and click **Next**



Wizard Step 2: Inspect Field Values

- Same as Tabular Wizard
- Review fields and their values
- Click **Next**



Wizard Step 3: Define Data Fields

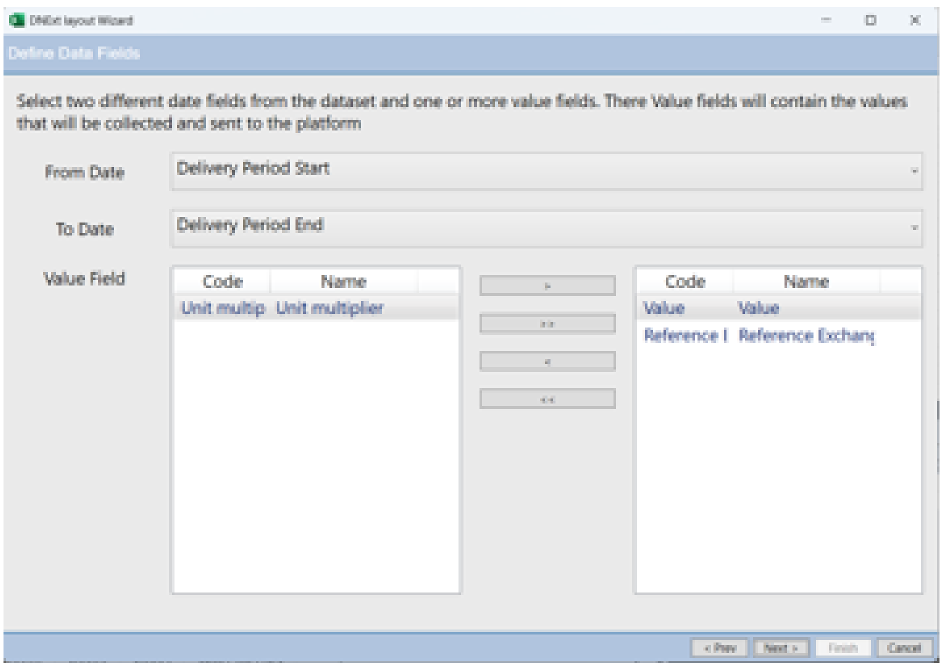
Select:

- **Two Date Fields**: Define the time dimension
  - Example: <u>Delivery Period Start Date</u> and <u>Delivery Period End Date</u>
- **One or More Value Fields**: The metrics you'll update
  - Example: <u>Price Value , Reference Exchange Delivery Date</u>

How to Configure:

1. Select the Data Fields
2. Move them by clicking on the → button
3. Click **Next**

⚠ **Requirement**: Must select exactly 2 date fields



Wizard Step 4: Define Fixed Fields

- Same concept as Tabular Wizard
- Move reference fields to Fixed Fields list
- These remain constant across the entire template
- Click **Next**

Example:

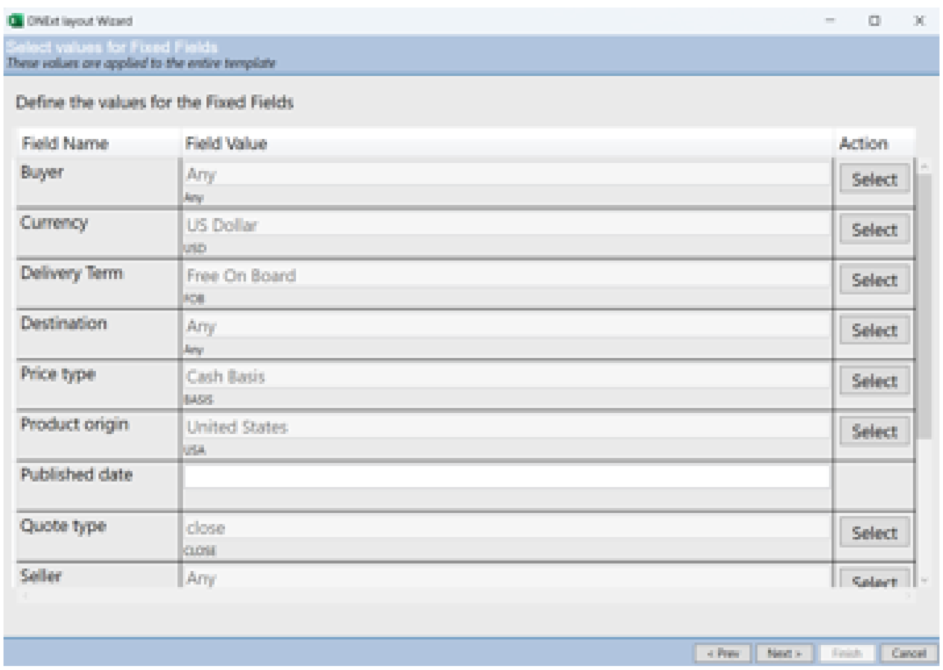
- Delivery Term
- Destination
- Price Type
- Product origin

Wizard Step 5: Define Values for Fixed Fields

Select values for fixed fields from the provided reference list. For fields like "Date," "Unit Multiplier"

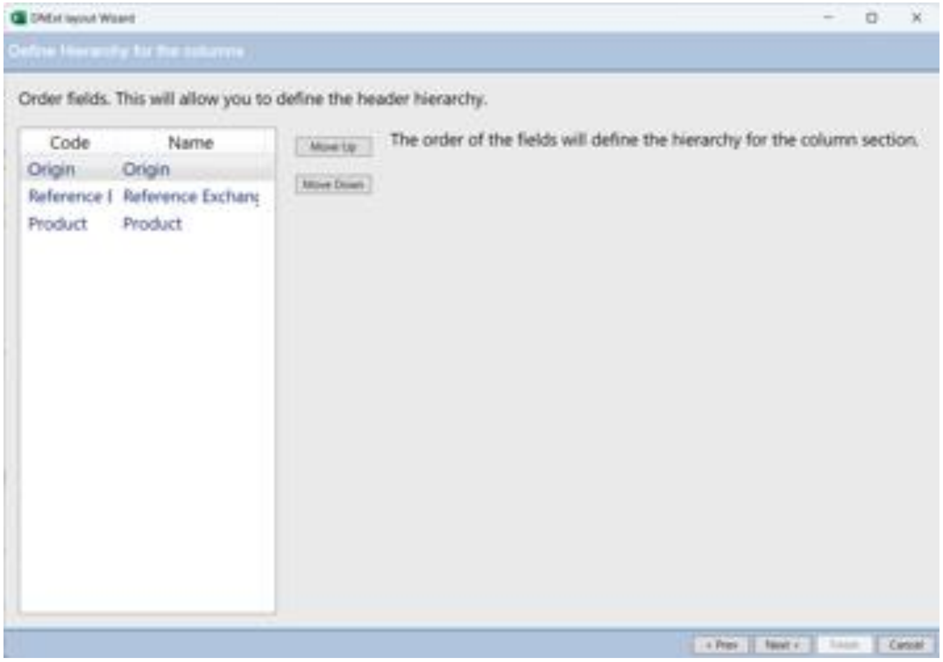
1. **Date Fields**: Choose a date in the format *mm/dd/yyyy* (e.g., 10/15/2025). If left blank, it will automatically default to today's date.
2. **Unit Multiplier Fields**: Enter a multiplier or leave it blank. If blank, the multiplier will default to *1*.

Click **Next** to proceed.



Wizard Step 6: Define Column Hierarchy

- Determines order of pivoted columns
- Select Field then click on “Move Up” or “Move Down” buttons
- First field = outermost column grouping
- Click **Next**



Wizard Step 7: Define First Level Values

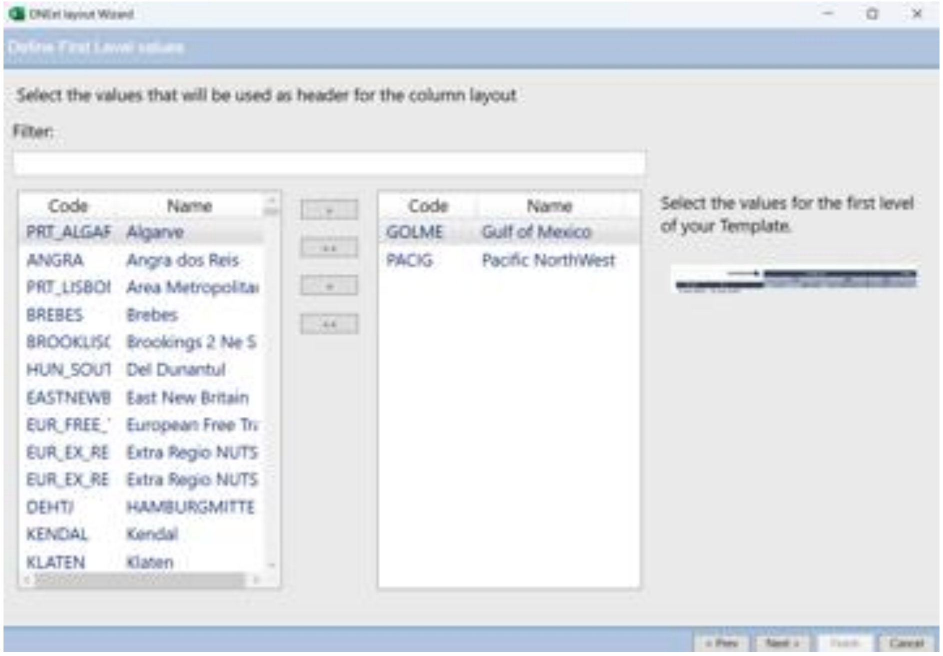
Purpose: Choose which values appear as column headers

1. Select the from the list of references in the left panel
2. Click on the “->” Button to move them to the right panel

⚠ **Note**: Upon choosing more then one reference each one will become a header for a new column

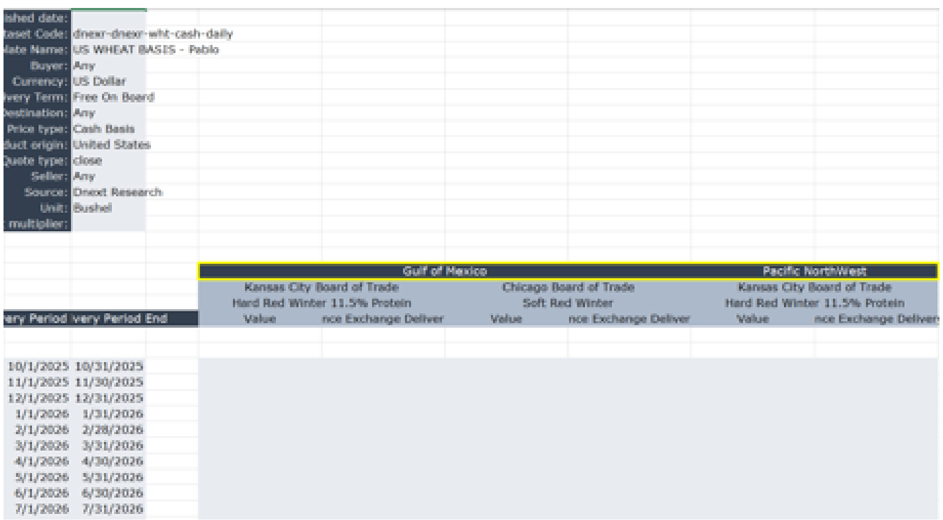
Example: If first field is "Origin":

- ☑ Gulf of Mexico
- ☑ Pacific North West



Click **Next**

☑ **How it would look in the final template**: Two column groups (Gulf of Mexico, Pacific North West)



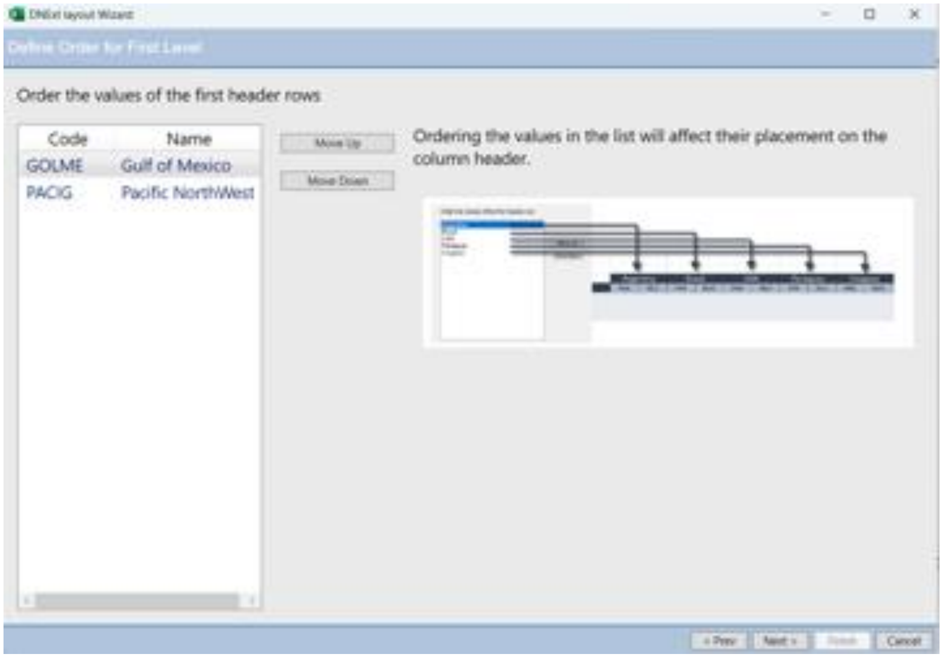
Wizard Step 7: Define Order for First Level

Purpose: Control left-to-right placement of column groups

1. Select Value from the list on the left panel
2. click on **"Move Up"** or **"Move Down"** Buttons
3. Top = leftmost columns

4. Bottom = rightmost columns
5. Click **Next**

Example Order:



Wizard Step 8: Layout Interactive Design

Purpose: Assign reference items for each column group

How It Works:

- Each column group (from First Level Values) appears
- Click **+ button** next to each to assign reference items
- Reference items determine which specific records appear

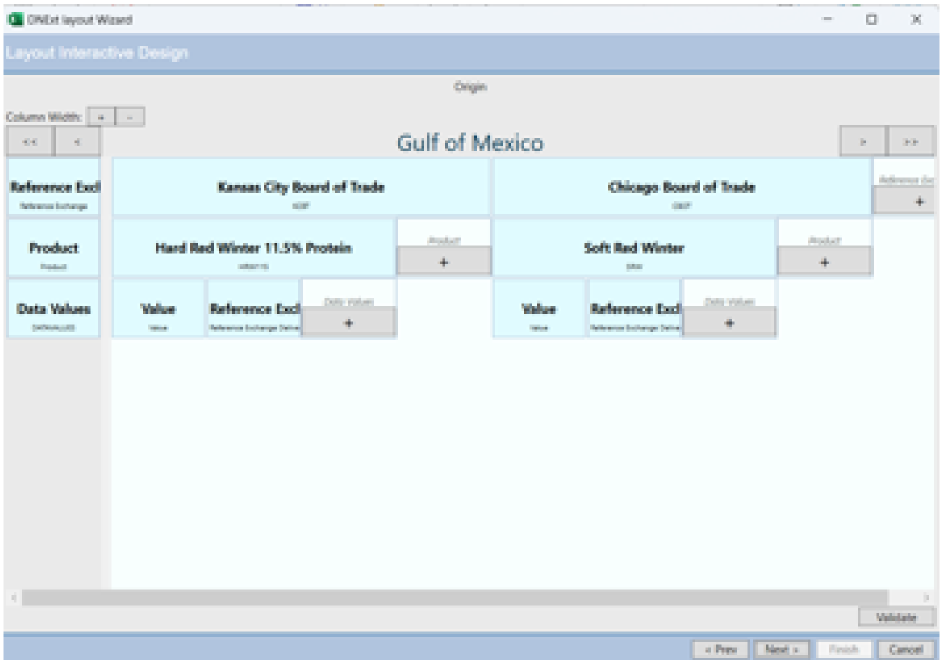
Example: For "Gulf of Mexico" column group:

- Click **+**
- Select reference items:
  - Reference Exchange : “Kansas City Board of Trade” , “Chicago Board of Trade”
  - Product “Hard Red Winter 11.5% Protein”, “Soft Red Winter”
  - Data Values : “Value” , “Reference Exchange Delivery”

⚠ **Note** : the “Value” in here means it's an input cell where user inputs Values

Finalize:

1. Assign references for all column groups
2. Click **Next**



Wizard Step 9: Define Options

- Same as Tabular Wizard Step 6
- Set template name, rows, column width, colors
- Click **Create Template** or **Finish**

☑ **Success**: Layout template generates with pivoted structure

5.5.2 Edit Template

- **Location**: Templating section, center button
- **Function**: Modify an existing template in the current sheet
- **How to Use**:
    1. Open a sheet with a template loaded
    2. Click **Edit Template**
    3. Wizard opens with current template settings
    4. Modify settings as needed in each step as needed
    5. Click on **Finish**

Use Cases:

- Duplicate a colleague's template with slight modifications
- Adjust Fixed Field values
- Change column hierarchy or options
- Save variations of same template structure

⚠ **Note**: Editing doesn't affect data in sheet—only template definition for future use

---

5.5.3 Manage Templates

- **Location**: Templating section, right button
- **Function**: View and manage sheet-template relationships and locally stored templates
- **How to Use**: Click to open management window

Two Tabs:

Tab 1: Sheet Maps

Purpose: Shows which sheets are linked to which templates/datasets

Display:

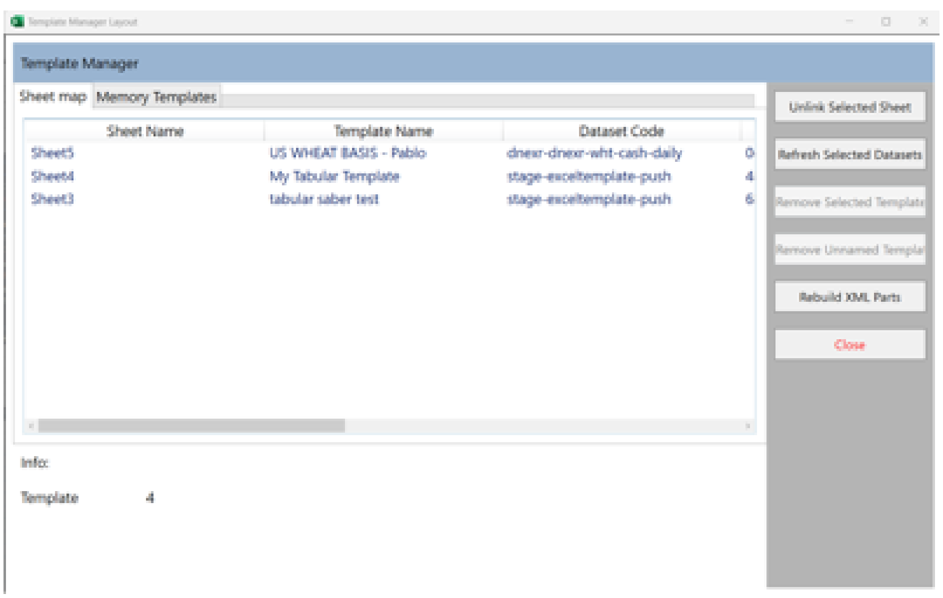
- Column 1: Sheet name
- Column 2: Linked template name
- Column 3: Linked dataset name
- Column 4: Last refresh timestamp

Actions Available:

- **Unlink Selected Sheet**: Disconnects template from sheet
  - Sheet remains but loses upload capability
  - Data stays intact
  - Use when: Repurposing sheet for different template
- **Refresh Selected Datasets**: Updates data in selected sheets
  - Same as Refresh button in Download section
  - Use when: Want to refresh specific sheets, not all

How to Use:

1. Select one or more sheets from list
2. Click action button
3. Confirm action



Tab 2: Memory Templates

Purpose: Lists templates stored locally in Excel's memory

What's Stored Here:

- Locally cached template definitions

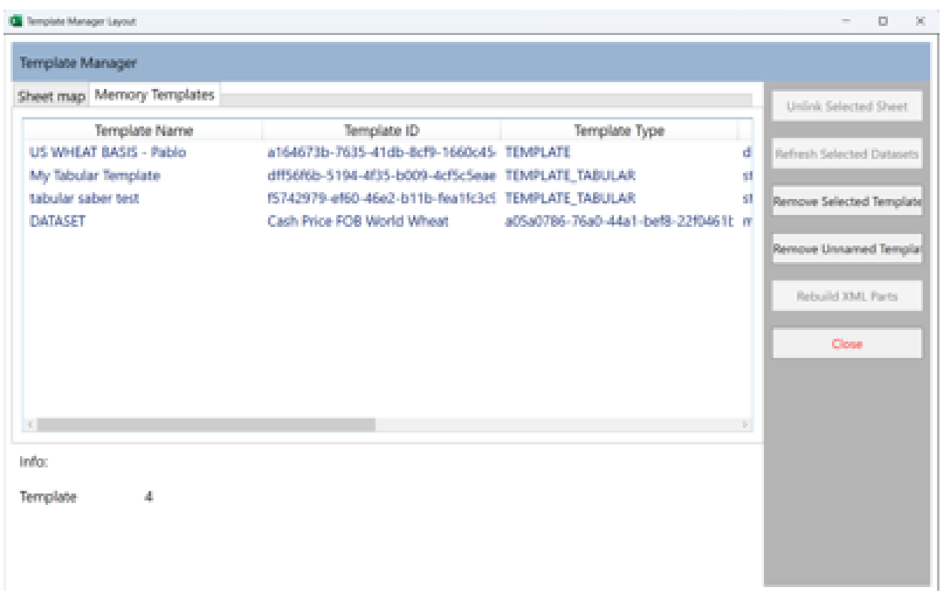
Actions Available:

- **Remove Selected Template**: Deletes template from local memory
  - Frees up memory
  - Use when: Cleaning up unused templates

How to Use:

1. Select template(s) from list
2. Click **Remove Selected Template**
3. Confirm deletion

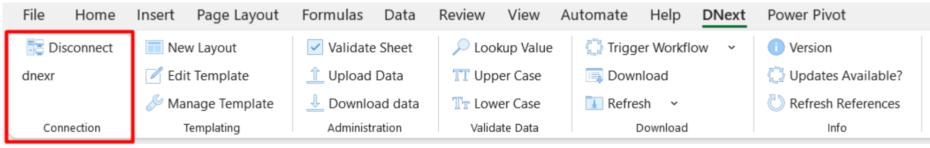
💡 **Note**: You can always re-download templates from platform if needed



5.6 Connection Section

Purpose: Manage your DNext platform connection

When to Use: Login, logout, or check connection status



5.6.1 Connect / Disconnect Button

- **Location**: Far right of DNext ribbon
- **Function**: Toggle connection to platform
- **Display**:
  - When disconnected: "Connect to DNext"
  - When connected: Shows organization name (e.g., "dnexr")

To Connect:

1. Click **Connect to DNext**
2. Enter credentials (see Section 4.2)
3. Complete MFA
4. Button shows organization name

To Disconnect:

1. Click button (showing organization name)
2. Select **Disconnect**
3. All ribbon buttons become inactive (grey)

Connection Status Indicators:

- ✅ Button shows org name + all buttons black = Connected
- ⚠️ Button says "Connect" + all buttons grey = Disconnected

💡 **Best Practice**:

- Disconnect before closing Excel for the day
- Connection persists across workbooks while Excel is open

---

6. Step-by-Step Guides

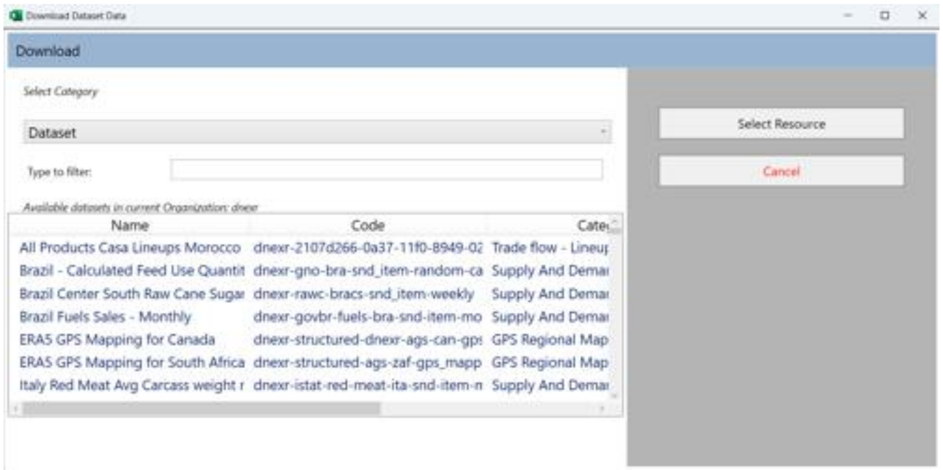
Guide 1: Download Data from Platform

Goal: Pull a dataset into Excel for analysis

Step 1: Open Download Dialog

1. Ensure you're connected (buttons are black)
2. Click **Download** button in Download section
3. Download window opens

☑ **Checkpoint**: Window titled "Download Dataset Data" Appears



Step 2: Select Data Category

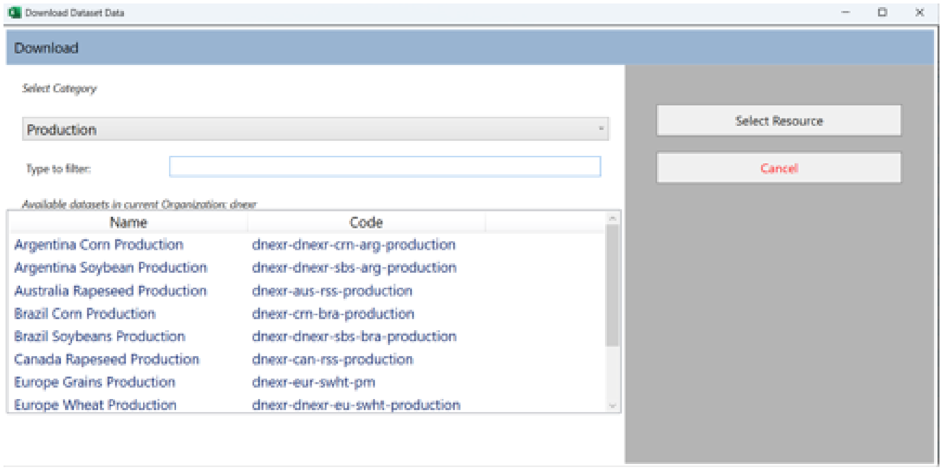
Choose the type of data you want to download:

Three Tabs Available:

Tab	Contains	Best For
Dataset	Raw Structured data of any field	Analysis , customs reports
Production	Agricultural data with forecasts	Production tracking, yield analysis
Trade Matrix	Import/export flow data with forecasts	Trade analysis, market research

1. Choose the Appropriate tab from the drop down menu
2. A list of available resources appears

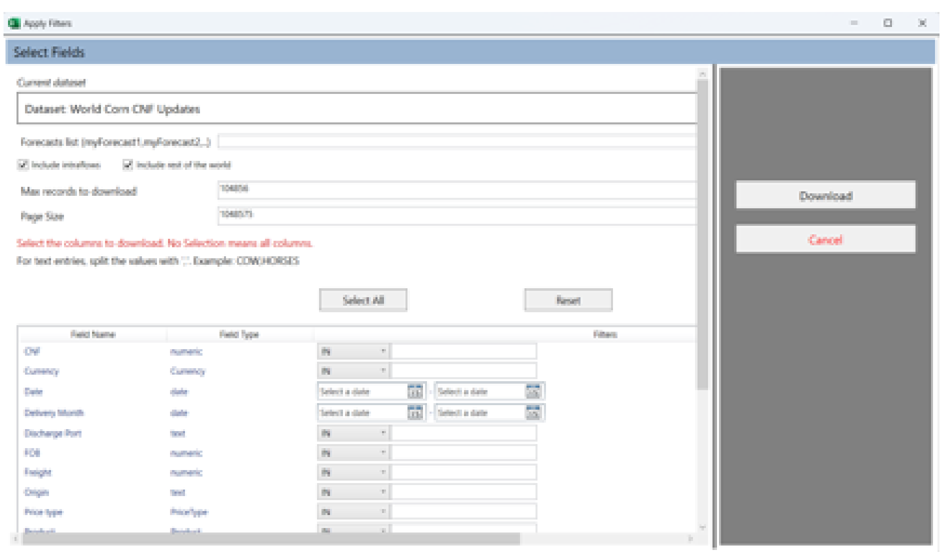
☑ **Checkpoint**: You see a list of datasets, productions, or trade matrices



Step 3: Select Your Resource

1. **Browse or Search**:
   - Scroll through the list, OR
   - Use search box to find specific resource
2. **Identify Your Data**:
   - Resource name
   - Resource code
   - Resource Category
   - Data Source
3. **Select**:
   - Click on the resource name to highlight it
   - Click **Select Resource** button

✅ **Checkpoint**: "Apply Filters" dialog opens



Step 4: Apply Filters

Purpose: Download only the data you need to reduce file size and improve performance

⚠ **Note** : Available Filters vary depending on the resource category

Forecasts list :

Forecasts list is for resources of Category “Production” or “Tradeflow”

you can input forecasts in the corresponding input box by putting their names and separating them with a coma

Example

- myForecast1,myForecast2

How to Apply:

1. for fields of type “Date” select a range of dates
2. for “Text” and “Numeric” Fields you can put a Value you want to match or exclude from the Data

💡 **Best Practice**: Start with broader filters, then refine in Excel if needed

No Filters Needed?

- Leave all filters blank
- Downloads entire dataset

4. Click **Download**

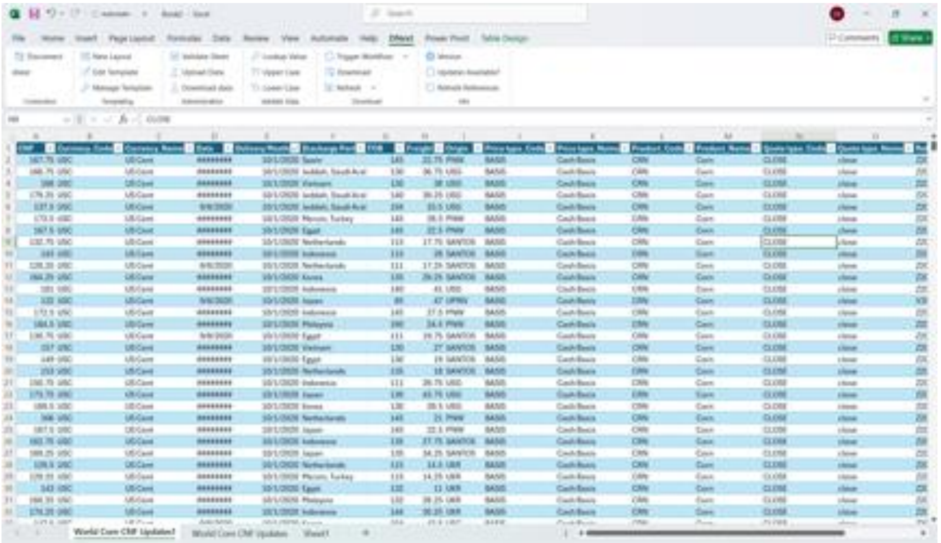
Step 5: Data Downloads to Excel

What Happens:

1. Loading window is displayed
2. New sheet is created in your workbook
3. Sheet name matches resource code
4. Data populates the sheet

✅ **Success Indicators**:

- New sheet tab appears at bottom
- Data visible in rows and columns
- Excel Notification signaling success



Step 6: Verify and Start Working

Check Your Data:

- Column headers match expected fields
- Row count seems reasonable
- Data values look correct

Next Steps:

- Create pivot tables
- Build charts
- Apply Excel formulas
- Save workbook for future use

💡 **Remember**: Use **Refresh** button to update this data later without re-downloading

---

Guide 2: Download Data with Template

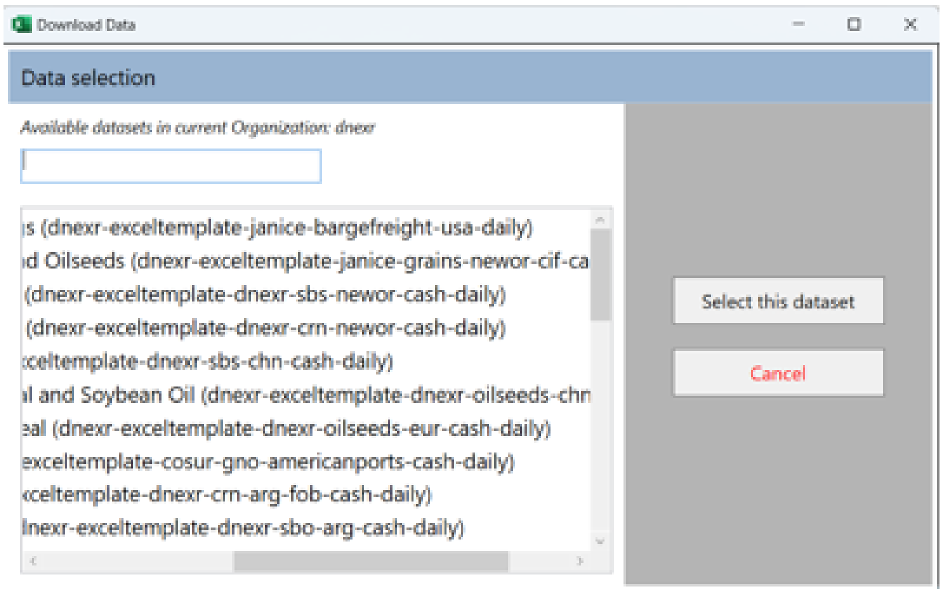
Goal: Download dataset in a template format for editing and uploading back

---

Step 1: Open Administration Download

1. Ensure you're connected to DNext
2. Click **Download Data** button in Administration section
3. Dialog opens showing template-enabled datasets

☑ **Checkpoint**: "Download Template Data" window appears



⚠ **Note**: Only datasets created with the category "CategoryExcelTemplate" appear here

---

Step 2: Select Dataset

1. Browse the list of available datasets
2. Click on dataset name to select it
3. Dataset description appears (if available)
4. Click **Next**

☑ **Checkpoint**: "Filter by Date Range" page appears

Step 3: Apply Date Filters

Purpose: Limit data to a specific date

1. **Identify Date Fields**:

- Bottom Panel shows available dates records in dataset
- Select the date(s) you want to download

⚠ **Note**: you can select / un select dates by clicking on them once

2. **Set Date Range**:
   - **Start Date**: Click calendar icon or type date
   - **End Date**: Click calendar icon or type date
   - Format: dd/mm/yyyy

Example:

- Start: 2025-01-01
- End: 2025-12-31
- Result: Only available 2025 data downloads

3. Click **Next**

⚠ **Note**: you can only download data after either selecting multiple date records or setting up a date range

⚠ **Note**: to download with template you need to only select one date as this will be the input of the data you upload

---

Step 4: Choose Download Format

Two Options:

Option A: Tabular Form

- Standard row/column structure
- Best for: Viewing, analyzing, ad-hoc editing
- Can edit and upload to a dataset you choose

⚠ **Note**: this method barely creates a payload for a the workflow of the dataset you choose there might be errors in the workflow steps that you might need to address on the platform not recommended for novice users

- Flexible and familiar

Option B: Template Form

- Structured template format
- Best for: Data entry, validation, uploading back

- Includes validation rules
- Can upload changes to platform

How to Choose:

1. Click radio button for desired format
2. Review description

Decision Guide:

- Need to upload data? → **Template Form**
- Just viewing/analyzing? → **Tabular Form**
- Not sure? → **Template Form** (more capabilities)

3. Click **Download**

Step 5: Template/Data Downloads

Tabular Form:

- Data appears in new sheet
- Standard Excel table format
- Ready for immediate use

Template Form:

- New sheet with template structure
- Headers formatted
- Validation rules embedded
- Data pre-populated (if any)
- Empty rows for new entries

✅ **Success**: Sheet appears with data/template structure

date:	10/14/2025
hed date:	
set Code:	dnext-dnext-wht-cash-daily
ble Name:	US WHEAT BASIS - Pablo
Buyer:	Any
Currency:	US Dollar
ery Term:	Free On Board
estination:	Any
Price type:	Cash Basis
uct origin:	United States
uote type:	close
Seller:	Any
Source:	Dnext Research
Unit:	Bushel
multiplier:	

		Gulf of Mexico				Pacific NorthWest	
		Kansas City Board of Trade		Chicago Board of Trade		Kansas City Board of Trade	
		Hard Red Winter 11.5% Protein		Soft Red Winter		Hard Red Winter 11.5% Protein	
ry Period	Delivery Period End	Value	nce Exchange Delivery	Value	nce Exchange Delivery	Value	nce Exchange Delivery Date
######	10/31/2025	135	12/1/2025	90	12/1/2025		
######	11/30/2025	135	12/1/2025	115	12/1/2025		
######	12/31/2025	135	12/1/2025	115	12/1/2025		
1/1/2026	1/31/2026	135	3/1/2026	100	3/1/2026		
2/1/2026	2/28/2026	135	3/1/2026	110	3/1/2026		
3/1/2026	3/31/2026	130	3/1/2026	100	3/1/2026		
4/1/2026	4/30/2026	130	5/1/2026	95	5/1/2026		
5/1/2026	5/31/2026						
6/1/2026	6/30/2026						
7/1/2026	7/31/2026						
8/1/2026	8/31/2026						

Step 6: Work with Template

If Editing/Adding Data:

1. Enter data in empty or filled rows
2. Follow column requirements
3. Use Lookup Value for reference fields
4. Validate before uploading (see Guide 3)

Guide 3: Edit and Upload Data

Goal: Enter data in template, validate, and upload to platform

---

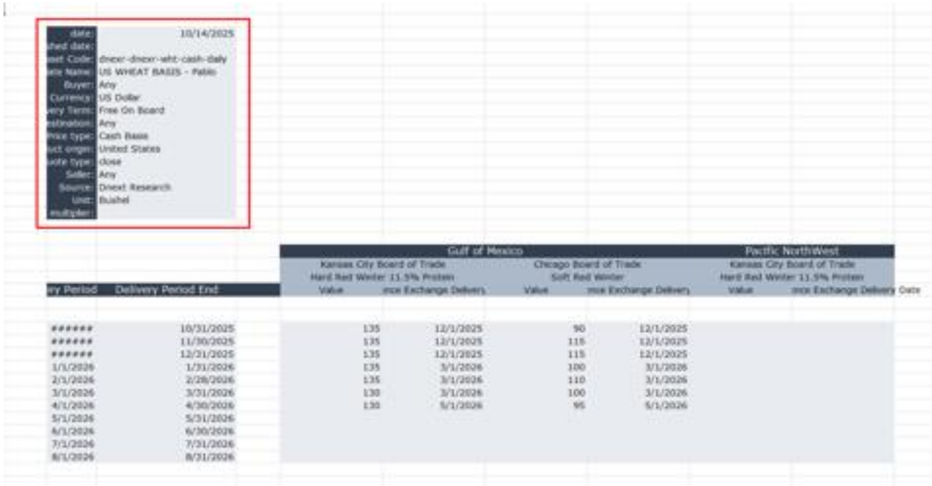
Prerequisites:

- Template downloaded via Administration > Download Data

Step 1: Understand Your Template

Review Template Structure:

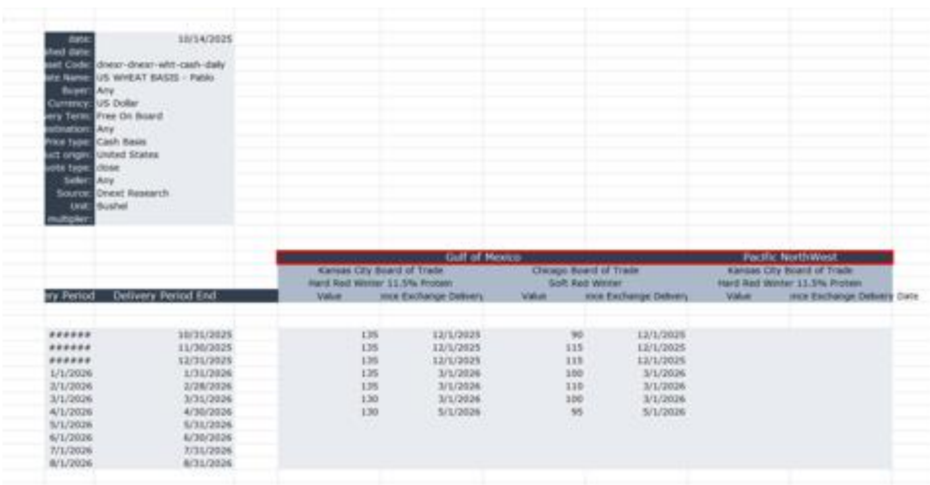
1. **Fixed Fields** (if any):
    - Shown at top left of the excel sheet
    - Already filled with consistent values
    - Don't modify these



date:	10/14/2025
hed date:	
set Code:	dnexr-dnexr-wht-cash-daily
ate Name:	US WHEAT BASIS - Pablo
Buyer:	Any
Currency:	US Dollar
ery Terms:	Free On Board
estination:	Any
Price type:	Cash Basis
uct origin:	United States
uote type:	close
Seller:	Any
Source:	Dnext Research
Unit:	Bushel
multiplier:	

		Gulf of Mexico				Pacific NorthWest	
		Kansas City Board of Trade		Chicago Board of Trade		Kansas City Board of Trade	
		Hard Red Winter 11.5% Protein		Soft Red Winter		Hard Red Winter 11.5% Protein	
ry Period	Delivery Period End	Value	ence Exchange Delivery	Value	ence Exchange Delivery	Value	ence Exchange Delivery Date
######	10/31/2025	135	12/1/2025	90	12/1/2025		
######	11/30/2025	135	12/1/2025	115	12/1/2025		
######	12/31/2025	135	12/1/2025	115	12/1/2025		
1/1/2026	1/31/2026	135	3/1/2026	100	3/1/2026		
2/1/2026	2/28/2026	135	3/1/2026	110	3/1/2026		
3/1/2026	3/31/2026	130	3/1/2026	100	3/1/2026		
4/1/2026	4/30/2026	130	5/1/2026	95	5/1/2026		
5/1/2026	5/31/2026						
6/1/2026	6/30/2026						
7/1/2026	7/31/2026						
8/1/2026	8/31/2026						

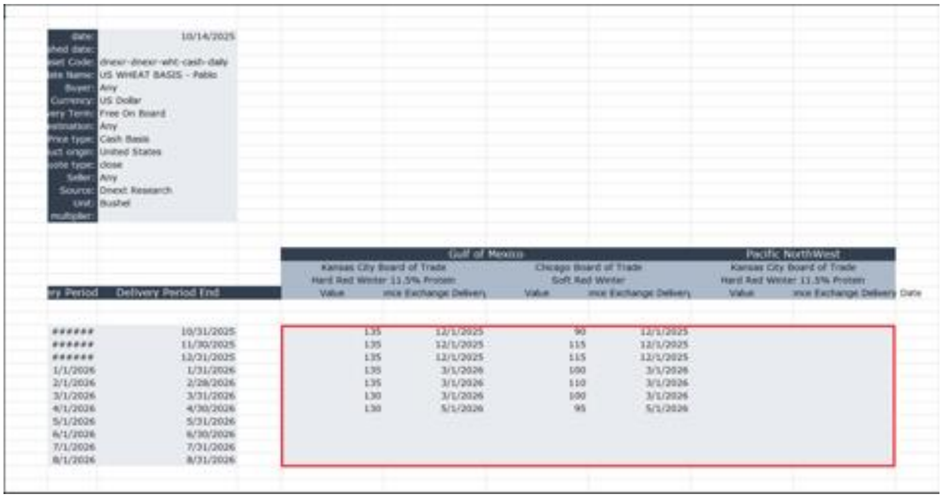
2. **Column Headers**:
    - Field names from dataset



date:	10/14/2025
hed date:	
set Code:	dnexr-dnexr-wht-cash-daily
ate Name:	US WHEAT BASIS - Pablo
Buyer:	Any
Currency:	US Dollar
ery Terms:	Free On Board
estination:	Any
Price type:	Cash Basis
uct origin:	United States
uote type:	close
Seller:	Any
Source:	Dnext Research
Unit:	Bushel
multiplier:	

		Gulf of Mexico				Pacific NorthWest	
		Kansas City Board of Trade		Chicago Board of Trade		Kansas City Board of Trade	
		Hard Red Winter 11.5% Protein		Soft Red Winter		Hard Red Winter 11.5% Protein	
ry Period	Delivery Period End	Value	ence Exchange Delivery	Value	ence Exchange Delivery	Value	ence Exchange Delivery Date
######	10/31/2025	135	12/1/2025	90	12/1/2025		
######	11/30/2025	135	12/1/2025	115	12/1/2025		
######	12/31/2025	135	12/1/2025	115	12/1/2025		
1/1/2026	1/31/2026	135	3/1/2026	100	3/1/2026		
2/1/2026	2/28/2026	135	3/1/2026	110	3/1/2026		
3/1/2026	3/31/2026	130	3/1/2026	100	3/1/2026		
4/1/2026	4/30/2026	130	5/1/2026	95	5/1/2026		
5/1/2026	5/31/2026						
6/1/2026	6/30/2026						
7/1/2026	7/31/2026						
8/1/2026	8/31/2026						

3. **Data Rows**:
    - Pre-populated data
    - Empty rows



date:	10/14/2025
shed date:	
set Code:	dnexr-dnexr-wht-cash-daily
ate Name:	US WHEAT BASIS - Pablo
Buyer:	Any
Currency:	US Dollar
ery Term:	Free On Board
estination:	Any
Price type:	Cash Basis
uct origin:	United States
uote type:	close
Seller:	Any
Source:	Dnext Research
Unit:	Bushel
multiplier:	

		Gulf of Mexico				Pacific NorthWest		
		Kansas City Board of Trade		Chicago Board of Trade		Kansas City Board of Trade		
		Hard Red Winter 11.5% Protein		Soft Red Winter		Hard Red Winter 11.5% Protein		
ery Period	Delivery Period End	Value	ince Exchange Delivery	Value	ince Exchange Delivery	Value	ince Exchange Delivery	Date
######	10/31/2025	135	12/1/2025	90	12/1/2025			
######	11/30/2025	135	12/1/2025	115	12/1/2025			
######	12/31/2025	135	12/1/2025	115	12/1/2025			
1/1/2026	1/31/2026	135	3/1/2026	100	3/1/2026			
2/1/2026	2/28/2026	135	3/1/2026	110	3/1/2026			
3/1/2026	3/31/2026	130	3/1/2026	100	3/1/2026			
4/1/2026	4/30/2026	130	5/1/2026	95	5/1/2026			
5/1/2026	5/31/2026							
6/1/2026	6/30/2026							
7/1/2026	7/31/2026							
8/1/2026	8/31/2026							

Step 2: Enter Your Data

For New Records:

1. Go to first empty row
2. Enter data column by column
3. Tab to move between cells

Best Practices:

- ✕ Don't modify Fixed Field values
- ✕ Don't delete or rename columns

For Date Fields:

- Use format: mm/dd/yyyy to match existing dates

For Number Fields:

- No commas in large numbers (enter 1000000 not 1,000,000)
- Decimal separator: period (.) not comma
- Match precision of existing data

Step 3: Upload to Platform

Once Validation Passes:

1. **Review Data One Last Time**:
   - Spot-check several rows

    - Verify Fixed Field values are correct
    - Confirm you're uploading the right data
2. **Initiate Upload**:
    - Click **Upload Data** button (Administration section)
    - Confirmation dialog appears
3. **Confirm Upload**:
    - Review information
    - Click **Yes**

⚠ **Note**: **“Validate Sheet”** only works on Tabular Templates so any errors in data validation are caught on the platform and are not displayed in excel

⚠ **Warning**: Upload is immediate and cannot be undone from Excel. Ensure accuracy.

Step 6: Monitor Upload Progress

During Upload:

- Progress bar shows completion rate
- Don't close Excel or disconnect during upload

Step 7: Verify Upload Success

✅ **Success Message**: "Data Loaded to [organization] for validation"

What Happens Next:

- Data is now in DNext platform
- Platform processes and integrates data depending on your loading strategy
- Data appears in platform immediately or after processing delay

Verification Steps:

1. Log into DNext platform (web interface)
2. Navigate to the dataset
3. Verify your records appear
4. Check data accuracy in platform

💡 **Best Practice**: Keep Excel file as backup record of uploaded data

---

If Upload Fails: ❌ Error message Appears

- Connection lost → Reconnect and try again
- Server error → Wait and retry, or contact support@dnext.io

Troubleshooting:

1. Check internet connection
2. Verify you're still logged in (click Connect button)
3. Try uploading again
4. If persistent, contact support@dnext.io with error message

---

Guide 5: Execute a Workflow

Goal: Run a platform workflow directly from Excel

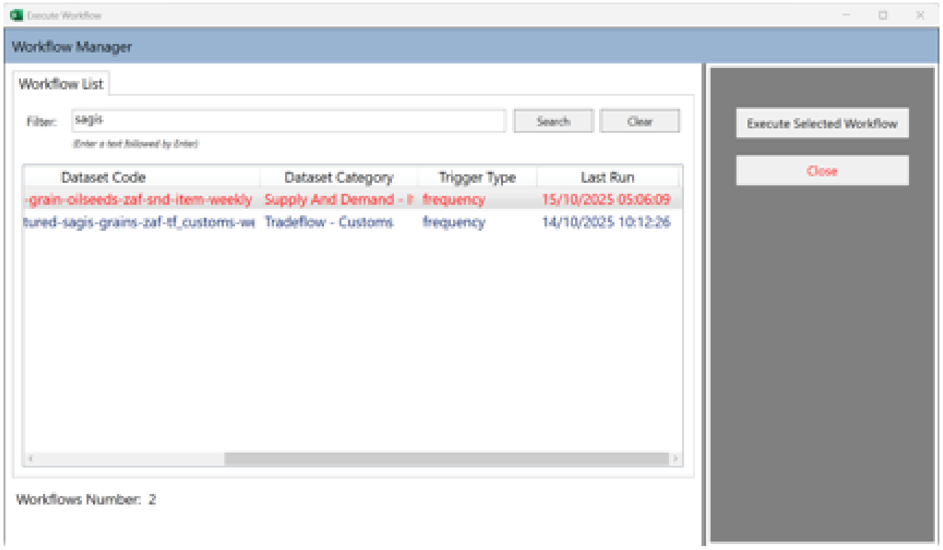
What Are Workflows? Automated processes in DNext platform that:

- Refresh datasets
- Refresh dashboards

Step 1: Open Workflow List

1. Ensure you're connected to DNext
2. Click **Trigger Workflow** button (Download section)
3. Workflow selection dialog opens

✅ **Checkpoint**: "Execute Workflow" window appears



Step 2: Select Workflow

Window Shows:

- Dataset name
- Dataset code
- Trigger Type
- Last run time

How to Choose:

1. **Browse** the list or **Search** by name
2. **Check last run** to see if recently executed
3. **Click** on workflow name to select

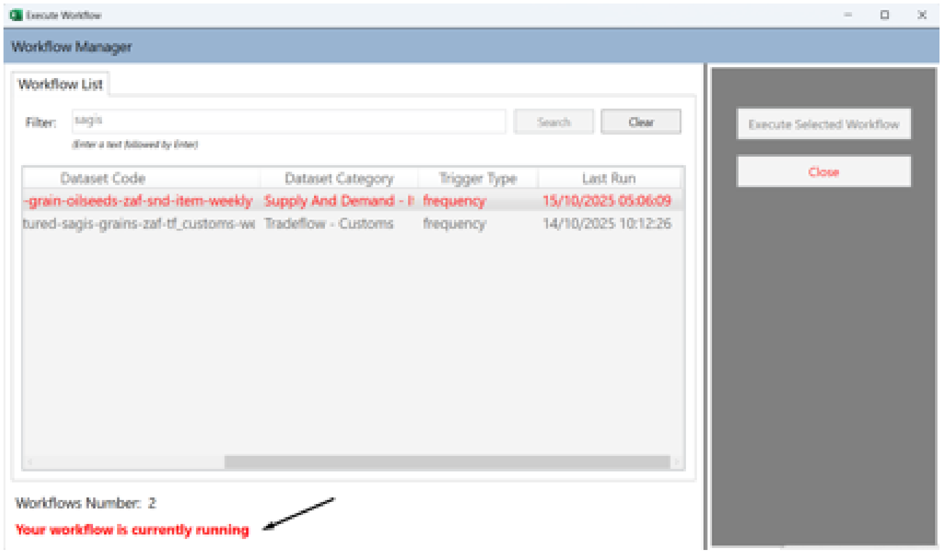
Step 3: Execute Workflow

1. Review selected workflow and parameters
2. Click **Execute** or **Run Workflow** button
3. Confirmation may appear
4. Click **Yes** to confirm

Step 4: Monitor Execution

During Execution:

- a message will appear on the bottom left of the window



Step 6: View Results

Outputs May Include:

- Updated datasets (refresh in Excel to see)

Next Steps:

- If workflow refreshed a dataset downloaded in your sheet via the Excel Add-in : Click **Refresh** button to update Excel

---

Guide 6: Refresh Data with New Filters

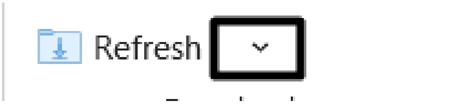
Goal: Update downloaded data with modified filter criteria

When to Use:

- Downloaded data for 2024, now need 2025
- Initially got all regions, now need only specific countries
- Need to add/remove forecasts in Production or Tradeflow data
- Want to expand or narrow data scope

Step 1: Select the “Refresh with new filters option”

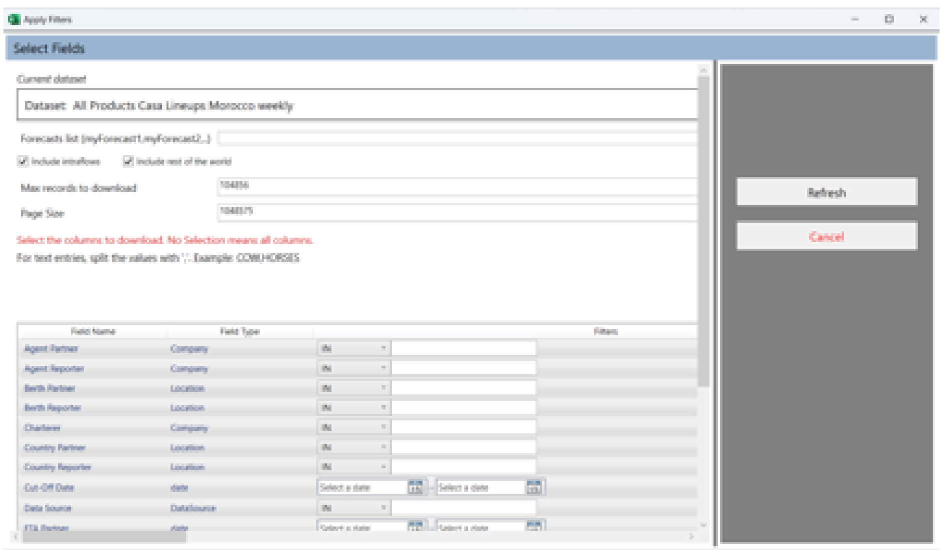
1. Click on the Expand Button next to the **“Refresh”** button in the download section



2. Click on the **“Refresh with new filters”** Button in the Download section of the DNext Ribbon
3. Filter dialog opens

☑ **Checkpoint**: Filter dialog appears showing current filter settings

⚠ **Note**: Only works for sheets created by the add-in, not sheets downloaded via any other method



Step 2: Modify Filters

Dialog Shows:

- Resource name (dataset/production/trade matrix)
- Current filter settings (what you used originally)
- All available filter options

Modify As Needed:

Example Modification:

Original Filters:
  Date: 2024-01-01 to 2024-12-31
  Countries: USA

```
New Filters:
  Date: 2025-01-01 to 2025-12-31  (changed year)
  Countries: Canada
```

Step 3: Apply and Refresh

1. Review modified filters
2. Click **Refresh** button

✅ **Success**: Excel Notification appears

Step 4: Data Refreshes

What Happens:

- Current data in sheet is replaced
- New data matching modified filters loads
- Sheet structure remains the same
- Formulas/formatting may need adjustment

Step 5: Verify New Data

Check:

- ✅ Row count changed appropriately
- ✅ Date ranges reflect new filters
- ✅ New countries/products appear
- ✅ Removed items are gone
- ✅ Column structure intact

If Using Pivot Tables or Charts:

- Click **Refresh** on pivot table
- Update chart data ranges if needed

💡 **Best Practice**: Save a copy before refreshing with major filter changes

---

7. Reference

7.1 Ribbon Button Quick Reference

Button	Section	Function
Version	Info	Show add-in version
Updates Available	Info	Check for updates
Refresh References	Info	Sync reference lists
Trigger Workflow	Download	Execute workflow
Run Last Workflow	Download	Repeat last workflow
Download	Download	Get data from platform
Refresh Sheet	Download	Update active sheet
Refresh Workbook	Download	Update all sheets
Refresh and Apply New Filters	Download	Update with new criteria
Lookup Value	Validate Data	Check reference values
Upper Case	Validate Data	Convert cell to uppercase
Lower Case	Validate Data	Convert cell to lowercase
Validate Sheet	Administration	Check for errors
Upload Data	Administration	Send data to platform
Download Data	Administration	Get template data
New Layout	Templating	Create/manage templates
Edit Template	Templating	create a new template based on current one
Manage Templates	Templating	View sheet/template links
Connect / Disconnect	Connection	Login/logout

7.2 Data Type Formats

Data Type	Required Format	Valid Examples	Invalid Examples

Date	mm/dd/yyyy	1/29/2025	Jan 15 2025, 2025-01-15, 2024-12-31
Number	No separators	1000000 || 5.99	1,000,000 || 5,99
Text	Any characters	Product Name, ABC-123	(no restrictions)
Reference	Exact match from list	Use **Lookup Value** for tabular templates	Typos not accepted
Boolean	True/False	True , False	Yes, No || 1,0

7.3 Template Types Comparison

Feature	Tabular Template	Layout Template
Structure	Row/column (standard)	Pivoted format
Flexibility	High - any fields	Low - specific use case
Learning Curve	Easy	Moderate
Best For	Most scenarios	few value field updates
Columns	As many as the the dataset contain	Predefined groups
Editing	Multiple fields at once	Focus on few value field
Recommendation	Default choice	Special cases only

---

8. Troubleshooting

Issue 1: Add-in Not Showing in Excel

Symptoms: No DNext tab appears in ribbon after installation

Causes:

- Add-in not properly installed
- Add-in disabled in Excel settings
- Excel not restarted after installation
- Incompatible Excel version

Solutions:

Solution A: Enable Add-in

1. Go to **File** > **Options** > **Add-ins**
2. At bottom, select **COM Add-ins** from dropdown
3. Click **Go** button
4. Check box next to **DNext Excel Add-in**
5. Click **OK**
6. Restart Excel
7. Uninstall current add-in:
   - Windows: Control Panel > Programs > Uninstall
8. Restart computer
9. Download fresh installer
10. Run as Administrator (Windows)
11. Restart Excel

Solution C: Check Excel Version

1. Go to **File** > **Account**
2. Verify version is Office 2016 or later
3. If older, upgrade Excel

Still not working? Contact **support@dnext.io**

Issue 2: Login Not Working

Symptoms: "Invalid credentials" or "Login failed" error

Causes:

- Incorrect organization name
- Wrong username/password
- MFA code expired or incorrect
- Account locked or disabled
- Network/firewall blocking connection

Solutions:

Solution A: Verify Organization Name

1. Check your DNext platform URL in browser
2. Format: `[organization].dnext.io`
3. Use only the `[organization]` part
4. **Must be lowercase** (common mistake)
5. Examples:
   - URL: `STAGE.dnext.io` → Enter: `stage` (lowercase)
   - URL: `Production.dnext.io` → Enter: `production`

Solution B: Verify Credentials

1. Try logging into DNext web platform first
2. Use exact same username/password in Excel
3. Username is usually email address
4. Password is case-sensitive

Solution C: MFA Code Issues

1. Check email spam/junk folder
2. Wait 30-60 seconds for email delivery
3. Enter code within validity period
4. Request new code if expired
5. Copy-paste code to avoid typos

Solution D: Check Account Status

1. Contact support@dnext.io
2. Verify account is active
3. Confirm you have the right permissions

Solution E: Network Issues

1. Verify internet connection is working
2. Try accessing your dnext platform in browser
3. Check if firewall is blocking Excel connections
4. If using VPN, try disabling it
5. Ask IT to whitelist `*.dnext.io` domain

Issue 4: Slow Performance

Symptoms: Add-in takes long time to respond, Excel freezes

Causes:

- Large dataset downloads
- Multiple large workbooks open
- Insufficient computer memory
- Network latency

Solutions:

Solution A: Reduce Data Volume

1. Use filters when downloading
2. Download only needed date ranges
3. Select specific countries/products instead of "All"
4. Download by year or quarter instead of all-time

Solution B: Close Other Files

1. Close unused Excel workbooks
2. Close other applications

Solution C: Refresh Selectively

1. Use **Refresh Sheet** instead of **Refresh Workbook**
2. Refresh only when needed, not automatically

Solution D: Computer Resources

1. Close background applications
2. Restart Excel periodically
3. Restart computer if Excel becomes sluggish
4. Consider upgrading RAM if consistently slow

Solution F: Network Optimization

1. Avoid VPN if not required

Issue 5: Downloaded Data Is Empty

Symptoms: Download completes but sheet has headers only, no data rows

Causes:

- Filters too restrictive (no data matches)
- Selected date range has no data
- Permission issues
- Resource itself is empty

Solutions:

Solution A: Check Filters

1. Download again with **no filters** (select all)
2. If data appears, filters were too restrictive
3. Gradually add filters to find correct combination

Solution B: Verify Date Range

1. Check dataset's available date range in platform
2. Ensure your filter dates overlap with available data
3. Try downloading "All dates" first

Solution C: Check Permissions

1. Log into DNext web platform
2. Navigate to the same dataset
3. Verify you can see data there
4. If not, request access from **support@dnext.io**

Solution D: Verify Resource Has Data

1. Check resource in web platform
2. May be empty or pending population
3. Contact **support@dnext.io**

Issue 6: Cannot Upload Data

Symptoms: Upload button is greyed out or error occurs during upload

Causes:

- Sheet not validated
- Validation errors not fixed
- Not a valid template sheet
- Connection lost

Solutions:

Solution A: Validate First

1. Click **Validate Sheet** button if you are using a Tabular Template
2. Must show an empty list
3. Fix any errors shown
4. Re-validate until zero errors
5. Then try Upload button again

Solution B: Verify Template Sheet

1. Sheet must be created via:
    - Administration > Download Data (Template Form), OR

    - Templating > New Layout
2. Manually created sheets cannot be uploaded
3. Check **Manage Templates** > **Sheet Maps** to verify sheet is linked

Solution C: Reconnect

1. Click **Connect** button to verify connection
2. If disconnected, log in again
3. Try upload again

Solution E: Check Sheet Modifications

1. Don't rename columns
2. Don't delete columns
3. Don't modify Fixed Field values
4. Don't change sheet structure
5. If modified, re-download template and re-enter data

Issue 7: Refresh Button Not Working

Symptoms: Clicking Refresh does nothing or shows error

Causes:

- Sheet not created by add-in
- Original resource deleted or moved
- Connection lost
- Permissions changed since download

Solutions:

Solution A: Verify Sheet Source

1. Check **Manage Templates** > **Sheet Maps**
2. Verify sheet is listed with linked resource
3. If not listed, sheet wasn't created by add-in
4. Must re-download data instead of refreshing

Solution B: Check Resource Availability

1. Log into DNext web platform
2. Navigate to the resource
3. Verify it still exists and is accessible
4. If deleted, contact **support@dnext.io**

Solution C: Reconnect

1. Verify connection status (Connect button)
2. Reconnect if needed
3. Try refresh again

Solution D: Re-download Instead

1. If refresh consistently fails
2. Use **Download** button to get fresh data
3. Copy any work to new sheet
4. Delete old problematic sheet

Issue 11: Can't Find Downloaded Data

Symptoms: Download completed but can't locate the new sheet

Causes:

- Sheet created but not visible
- Sheet tabs hidden
- Sheet name doesn't match expectations
- Scrolled past new sheet

Solutions:

Solution A: Check Sheet Tabs

1. Look at bottom of Excel window
2. Check all sheet tabs (left/right arrows to scroll tabs)
3. Look for sheet with dataset name or similar
4. Click tab to activate sheet

Solution B: Unhide Sheets

1. Right-click on sheet tab area
2. Select **Unhide**
3. Check if your sheet is in list
4. Select and click **OK**

Solution C: Search for Data

1. Press **Ctrl+F** (Windows)
2. Enter search text from your data

3. Find will navigate to data location
4. Note which sheet it's on

Solution D: Check File Location

1. Verify you're looking in correct workbook
2. Download creates sheet in currently open workbook
3. Check if Excel opened new workbook instead

Issue 12: Lookup Value Not Working

Symptoms: Lookup Value button is inactive or shows no values

Causes:

- Not a reference field
- selected cell is not in a Tabular template
- No reference data loaded
- Wrong cell selected

Solutions:

Solution A: Verify Field Type

1. Only reference fields show lookup values
2. Check column header for field description
3. Free-text fields won't have lookup
4. Try different field in same row

Solution B: Check Template Type

1. Lookup Value only works on Tabular templates
2. Check **Manage Templates** > **Sheet Maps**
3. Verify sheet is linked to template
4. Re-download template if not linked

Solution C: Refresh References

1. Click **Refresh References** button (Info section)
2. Wait for completion
3. Try Lookup Value again
4. Reference lists may have been empty

Solution D: Select Correct Cell

1. Ensure you're in data row (not header)
2. Ensure you're in correct column
3. Click cell clearly and try again
4. Verify cell background shows you're in data area

Issue 13: Data Appears Incorrectly Formatted

Symptoms: Numbers show as text, dates show as numbers, formatting lost

Causes:

- Excel auto-formatting disabled
- Regional settings causing format issues

Solutions:

Solution A: Apply Number Formatting

1. Select affected cells/column
2. Right-click > **Format Cells**
3. Choose appropriate format:
   - **Numbers**: General or Number
   - **Dates**: Date format matching the following : mm/dd/yyyy
4. Click **OK**

Solution B: Use Find & Replace

1. For text numbers, convert to actual numbers:
   - Press **Ctrl+H** to open Find & Replace
   - Find: ' (apostrophe, if text starts with it)
   - Replace with: (leave blank)
   - Click **Replace All**
2. Select column, right-click > **Convert to Number**

Solution C: Check Regional Settings

1. Windows: Settings > Language > Region
   - Verify decimal separator (. or ,)
   - Verify date format
2. Ensure matches your data source

---

9. Glossary

Add-in: Software extension adding functionality to Excel

Benchmark: Primary dataset displayed in comparisons

COM Add-in: Component Object Model add-in type (Windows)

Connection: Active login session between Excel and platform

Dataset: Structured collection of data in platform

Field: Column or attribute in a dataset

Filter: Criteria limiting which data is downloaded

Fixed Field: Template field with consistent value across rows

Forecast: Projected values for future periods

Hierarchy: Ordered arrangement of fields in template

Layout Template: Pivoted template format for specialized use

Lookup Value: Feature viewing valid reference values

MFA: Multi-Factor Authentication security code

Organization Name: Unique identifier for your environment

Parameter: Input value required for workflow

Priority Rules: Configuration determining benchmark vs reference

Production: Configured view of agricultural data with forecasts

Reference: Comparison dataset alongside benchmark

Reference Field: Field accepting only predefined values

Refresh: Update previously downloaded data

Reporter: Geographic location in production data

Resource: General term for dataset, production, or trade matrix

Session: Active connection period

SND Item: Specific agricultural metric

Tabular Form: Standard row/column data structure

Tabular Template: Standard row/column template

Template: Pre-formatted Excel sheet linked to dataset

Trade Matrix: Import/export flow data

Upload: Send data from template back to platform

Validate: Check data before uploading

Value Field: Numeric field with measurements

Workflow: Automated platform process

10. FAQ

General Questions

Q: Is the add-in included in my subscription? A: Yes, the add-in is included at no additional cost.

Q: Can I use the add-in offline? A: No, internet connection required. Previously downloaded data viewable offline.

Q: Will updates break my workbooks? A: No, updates are backward compatible.

Q: Can I install on multiple computers? A: Yes, install anywhere you use Excel. Access controlled by username/password.

Q: Is my data secure in Excel? A: Data is only as secure as your file. Use password protection and encryption.

Installation Questions

Q: Why do I need Administrator rights? A: The add-in requires system-level permissions to integrate with Excel.

Q: Can I install without Administrator? A: for now not possible, Administrator privileges required on Windows. but

Q: How do I uninstall? A: Windows: Control Panel > Programs > Uninstall

Q: Can I have multiple versions? A: No, only one version. Updates replace automatically.

Q: What if the installer fails? A: Restart computer, close all programs, run as Administrator again.

Login Questions

Q: How do I find my organization name? A: First part of your platform URL (e.g., STAGE.dnext.io → "stage"). Must be lowercase.

Q: How often do I need to log in? A: Once per Excel session. Timeout after 24 hours inactivity.

Q: What if I forget my password? A: Use "Forgot Password" on DNext web platform login page.

Q: Can I use the same credentials? A: Yes, use exact same username and password as web platform.

Q: Why isn't my MFA code arriving? A: Check spam folder, wait 60 seconds, request new code, verify email address.

Data Questions

Q: What's the maximum dataset size? A: the number of maximum rows in an excel sheet which is **1,048,576**

Q: Can I edit after uploading? A: Yes,you can set up a loading strategy in the platform which lets you update concerned rows **.**

Template Questions

Q: Difference between Tabular and Layout? A: Tabular is flexible standard format (recommended). Layout is pivoted for specialized use.

Q: Can I create templates without downloading first? A: Yes you can create your own template

Q: Can I modify existing templates? A: No, but you can use Edit Template to adjust an already existing template and create a new version of it

---

Performance Questions

Q: Why is downloading slow? A: Large dataset or network latency

Q: How to speed up add-in? A: Close other apps, reduce data size, use sheet refresh instead of workbook.

Feature Questions

Q: Works with other data sources? A: No, designed specifically for DNext platform. but we can help you streamline your own data or any other public available data in the platform and then use it in the Excel Add-in

Q: Works with Excel Online? A: No, requires desktop Excel only.

---

11. Support

Primary Support Channel

Email: support@dnext.io

- **Response Time**: Usually within 24 hours
- **Availability**: Business hours, Monday-Friday

What to Include:

```
Subject: Excel Add-in Issue: [Brief Description]

Body:
- Add-in version: [Click Version button]
- Excel version: File > Account
- Operating System: [Windows 10/11]
- Issue Description: [What you were doing]
- Steps to Reproduce: [How to replicate]
- Error Message: [Exact text]
- Screenshot: [If available]
```

Before Contacting Support

☑ Check this guide ☑ Search FAQ section ☑ Check troubleshooting section ☑ Restart Excel and try again ☑ Verify internet connection

---

Feedback & Feature Requests

We Value Your Input:

- Bug reports improve quality
- Feature requests drive roadmap
- Usage feedback improves design

Submit Feedback:

- Email: support@dnext.io

Version Information

Current: 1.0.0 236 (October 2025)

Compatibility:

- ☑ Office 2016+
- ☑ Office 365
- ☑ Windows 10/11