

Installation:

1. Watch a [quick setup demo](#) outlining how to install and get started with the XBRL Filed Add-in for Excel.
2. Open an Excel file from M365 or Office365, choose the Insert menu, click the Get Add-ins button, search for 'XBRL' and install XBRL Filed Data.
3. Click the XBRL Filed Data menu option, then Get a Free Account and [follow the instructions on that page](#).

XBRL US Members should be able to login and generate client ID and secret pairs. If you're not able to do this, follow the prompt and request provisioning for this in email.

4. After the Add-in installs, click the XBRL Filed Data menu option to show the ribbon.
5. Click the login link in the ribbon to show the Query Wizard task pane.

If you don't have an XBRL US Web account provisioned to generate client ID and secret pairs, click the Get Account and Credentials button in the ribbon and follow the instructions on the web page.

6. Click the login button on the task pane and enter your XBRL US Web account email, password, client ID and secret, then click the login button at the bottom of the popup window.
7. Choose one of the functions in the task pane from the dropdown, at least one filter criteria, and the fields that should populate from the 'Data to Return' section of the Query Wizard task pane, then click the Search button.

Troubleshooting:

If you're having trouble getting data to appear, try the following in the listed order, and stop when your issue is resolved:

1. If your account has recently been provisioned and you're unable to generate client ID and secret pair to use in the Add-in, try using a private/incognito browser window or a different browser to login to the XBRL US web site where these pairs are created (or clear your browser's cache)

2. If you're using the 'Sign on with Google' option to login on the XBRL US Web site, make sure you have created an XBRL US Web account with a password (you can use the same email as your 'Sign on with Google' email) and use that email and password as the login for the Add-in.
3. If you login on the Add-in and the Query Wizard doesn't show 'Data to Return' options, right-click the task pane and choose reload, then click the logout button. After this, click the login button. **Still not working?** Uninstall the Add-in, close, re-open and re-install the Add-in.
4. If you return to Excel and the Add-in task panel shows 'Unable to open' the Add-in, click close on the panel, then choose 'Login / Query Wizard' to re-initialize the Add-in.
5. **Clear the cache in your browser**, then close and re-open Excel and the Add-in.

Tried everything and it still won't work? Email info@xbrl.us.

A handwritten signature in black ink, appearing to read 'Campbell Pryde', with a large, stylized initial 'C'.

Campbell Pryde
President and CEO
XBRL US, Inc.