

EXCEL QUICK START GUIDE

MARQUIS IQ + EXCEL

**SIGN IN TO
MARQUIS IQ**

CONNECT TO EXCEL

Welcome to Marquis IQ

Getting you set up is as easy as 1-2-3.

Allowing Database Access

1 Click Sign In

Click the “**Sign In**” button in the top-right corner after navigating to <http://app.marquisiq.com/>.

2 After Signing In

After successfully signing in, Excel users will need to whitelist their IP address in Marquis IQ.

Click the icon with your initials in the top-right corner. To connect to Excel, select “**Allw Database Access.**”

3 A Green Box Will Appear

A green confirmation box will appear in the middle of your screen displaying “**Database Access Granted.**”

4 Remember

If your IP address changes due to a new location, VPN, or network change, you will need to reconnect your database access for Excel.

app.marquisiq.com/MasterCustomerAssignmentPage

marquisIQ

Sign In

1

Finish update

Welcome to marquisIQ

Please sign in using your Microsoft account.
To request access, contact support@marquisdata.com.

↓ Marquis Demo SM

Currently Logged In As:
support@marquisdata.com
Marquis Support
69.249.185.9 [Allow Database Access](#)

Sign Out

2

3

Database Access Granted

marquisIQ

HOME Database Access Granted CTR FILED

Authorizing Data Connections

1 OPEN an Excel File in Marquis IQ

Marquis IQ contains Excel files from your organization that you can connect to. Open the file you would like to connect to. After opening the file, click “**Enable Editing**”.

2 PRESS the Data Tab

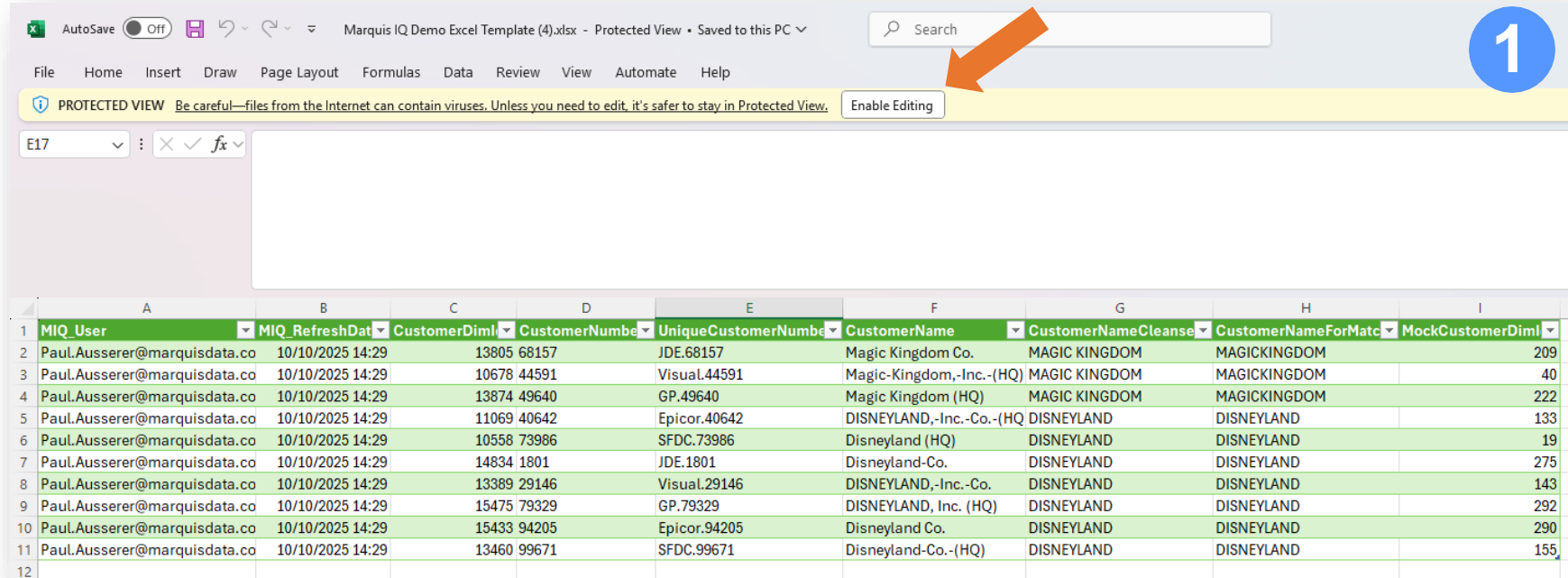
After selecting the Data tab, click “**Refresh All.**”

A query box will appear in the corner of your screen after clicking “**Refresh All.**”

Note: Only the first 10 rows of data are populated in the downloaded file until you click “**Refresh All.**”

3 PRESS “Run” in the Native Database Query Box.

A pop-up window will appear, and you will need to sign in to your Microsoft account.

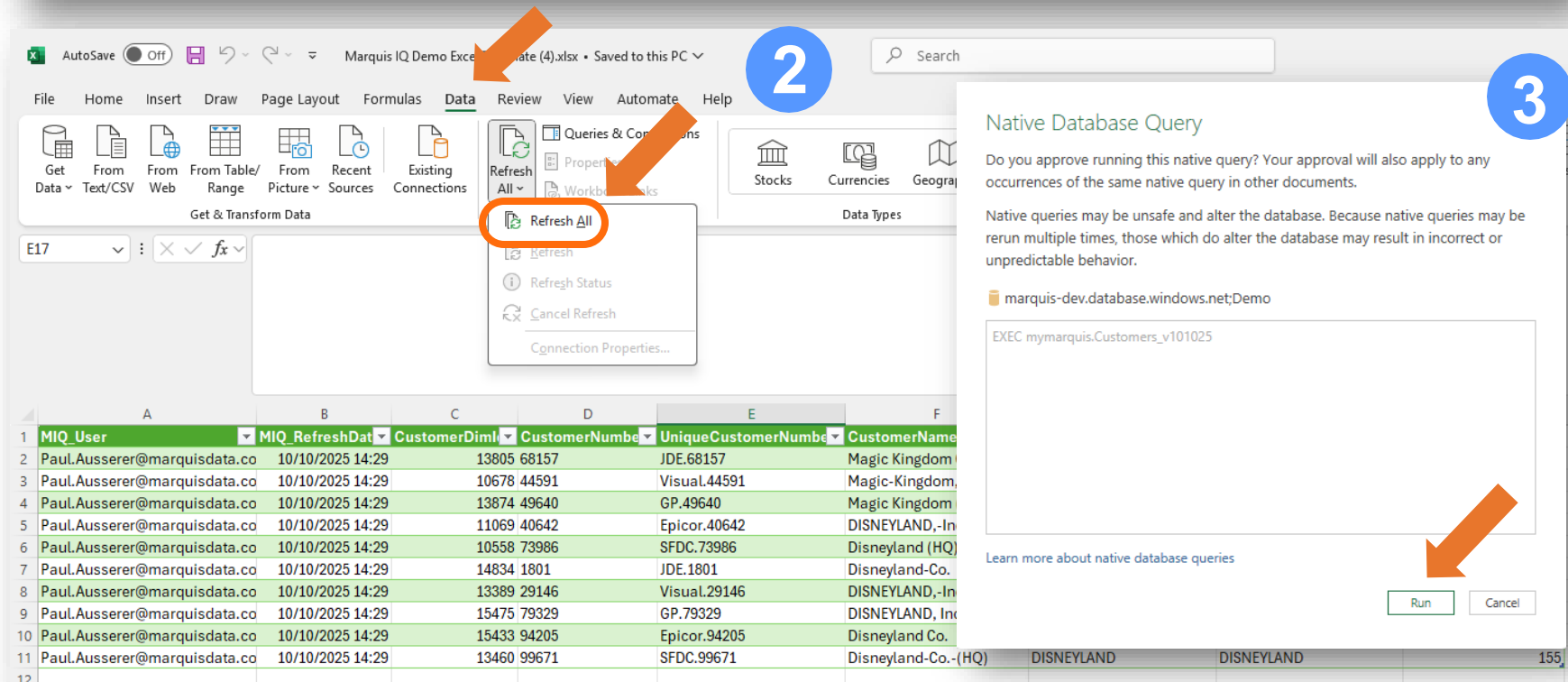


AutoSave Off Marquis IQ Demo Excel Template (4).xlsx - Protected View • Saved to this PC

File Home Insert Draw Page Layout Formulas Data Review View Automate Help

PROTECTED VIEW Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View. Enable Editing

MIQ_User	MIQ_RefreshDat	CustomerDiml	CustomerNumbe	UniqueCustomerNumbe	CustomerName	CustomerNameCleanse	CustomerNameForMatc	MockCustomerDiml
Paul.Ausserer@marquisdata.co	10/10/2025 14:29	13805 68157	JDE.68157	Magic Kingdom Co.	MAGIC KINGDOM	MAGICKINGDOM		209
Paul.Ausserer@marquisdata.co	10/10/2025 14:29	10678 44591	Visual.44591	Magic-Kingdom,-Inc.-(HQ)	MAGIC KINGDOM	MAGICKINGDOM		40
Paul.Ausserer@marquisdata.co	10/10/2025 14:29	13874 49640	GP.49640	Magic Kingdom (HQ)	MAGIC KINGDOM	MAGICKINGDOM		222
Paul.Ausserer@marquisdata.co	10/10/2025 14:29	11069 40642	Epicor.40642	DISNEYLAND,-Inc.-Co.-(HQ)	DISNEYLAND	DISNEYLAND		133
Paul.Ausserer@marquisdata.co	10/10/2025 14:29	10558 73986	SFDC.73986	Disneyland (HQ)	DISNEYLAND	DISNEYLAND		19
Paul.Ausserer@marquisdata.co	10/10/2025 14:29	14834 1801	JDE.1801	Disneyland-Co.	DISNEYLAND	DISNEYLAND		275
Paul.Ausserer@marquisdata.co	10/10/2025 14:29	13389 29146	Visual.29146	DISNEYLAND,-Inc.-Co.	DISNEYLAND	DISNEYLAND		143
Paul.Ausserer@marquisdata.co	10/10/2025 14:29	15475 79329	GP.79329	DISNEYLAND, Inc. (HQ)	DISNEYLAND	DISNEYLAND		292
Paul.Ausserer@marquisdata.co	10/10/2025 14:29	15433 94205	Epicor.94205	Disneyland Co.	DISNEYLAND	DISNEYLAND		290
Paul.Ausserer@marquisdata.co	10/10/2025 14:29	13460 99671	SFDC.99671	Disneyland-Co.-(HQ)	DISNEYLAND	DISNEYLAND		155



AutoSave Off Marquis IQ Demo Excel Template (4).xlsx • Saved to this PC

File Home Insert Draw Page Layout Formulas Data Review View Automate Help

Get Data From Text/CSV From Web From Table/Range From Picture Recent Sources Existing Connections

Refresh All Refresh Refresh Status Cancel Refresh Connection Properties...

Native Database Query

Do you approve running this native query? Your approval will also apply to any occurrences of the same native query in other documents.

Native queries may be unsafe and alter the database. Because native queries may be rerun multiple times, those which do alter the database may result in incorrect or unpredictable behavior.

marquis-dev.database.windows.net;Demo

```
EXEC mymarquis.Customers_v101025
```

Learn more about native database queries

Run Cancel

MIQ_User	MIQ_RefreshDat	CustomerDiml	CustomerNumbe	UniqueCustomerNumbe	CustomerName
Paul.Ausserer@marquisdata.co	10/10/2025 14:29	13805 68157	JDE.68157	Magic Kingdom	
Paul.Ausserer@marquisdata.co	10/10/2025 14:29	10678 44591	Visual.44591	Magic-Kingdom,	
Paul.Ausserer@marquisdata.co	10/10/2025 14:29	13874 49640	GP.49640	Magic Kingdom,	
Paul.Ausserer@marquisdata.co	10/10/2025 14:29	11069 40642	Epicor.40642	DISNEYLAND,-In	
Paul.Ausserer@marquisdata.co	10/10/2025 14:29	10558 73986	SFDC.73986	Disneyland (HQ)	
Paul.Ausserer@marquisdata.co	10/10/2025 14:29	14834 1801	JDE.1801	Disneyland-Co.	
Paul.Ausserer@marquisdata.co	10/10/2025 14:29	13389 29146	Visual.29146	DISNEYLAND,-In	
Paul.Ausserer@marquisdata.co	10/10/2025 14:29	15475 79329	GP.79329	DISNEYLAND, Inc	
Paul.Ausserer@marquisdata.co	10/10/2025 14:29	15433 94205	Epicor.94205	Disneyland Co.	
Paul.Ausserer@marquisdata.co	10/10/2025 14:29	13460 99671	SFDC.99671	Disneyland-Co.-(HQ)	

Downloading An Excel File

1 After Signing In

You will see a menu option in the top middle. Press “Files” to locate the Excel file you want to open.

2 After Clicking Files

On the left-hand side, you will see folders with drop-down menus. Press the drop-down arrows to expand the folders and view the available Excel files. You can also press into the folders on the right-hand side to locate the Excel file you want to open.

3 Downloading an Excel File

After finding the Excel file you want to download, click into the file. In the top-right corner, you will see three dots. After clicking the three dots, a drop-down menu will appear. Select “**Download.**”

4 Downloading an Excel File

Another way to download an Excel file is by pressing the blue button in the top-right corner labeled, “**Download Selected.**”

The image illustrates the process of downloading an Excel file in the MarquisIQ application through four sequential steps:

- Step 1:** The user is on the MarquisIQ dashboard. The 'FILES' menu item in the top navigation bar is highlighted with an orange arrow and a blue circle labeled '1'.
- Step 2:** The user has navigated to the 'FILES' section. On the left, a folder tree shows 'Marquis Demo' and 'My Downloads'. On the right, three folders are visible: 'Excel Templates', 'ToMarquis', and 'User Guides'. A blue circle labeled '2' is next to the search bar.
- Step 3:** The user has clicked into the 'Excel Templates' folder. A file named 'Automation_Test_File.xlsx' is shown with a green Excel icon. A three-dot menu icon is visible in the top right corner of the file card. A blue circle labeled '3' is next to the file.
- Step 4:** The user has clicked the three-dot menu. A context menu is open, showing options: 'Download', 'Share', and 'Details'. Additionally, a blue button labeled 'Download Selected (1)' is visible in the top right corner of the file view. A blue circle labeled '4' is next to the 'Download Selected' button.

Connecting to Excel

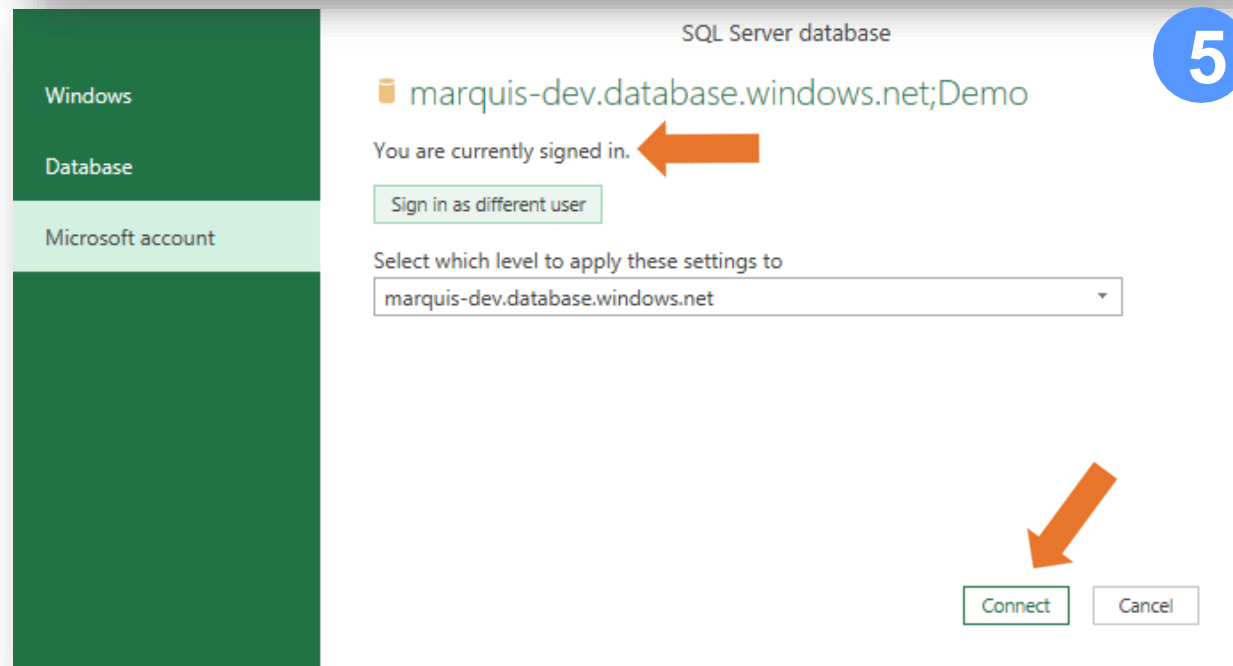
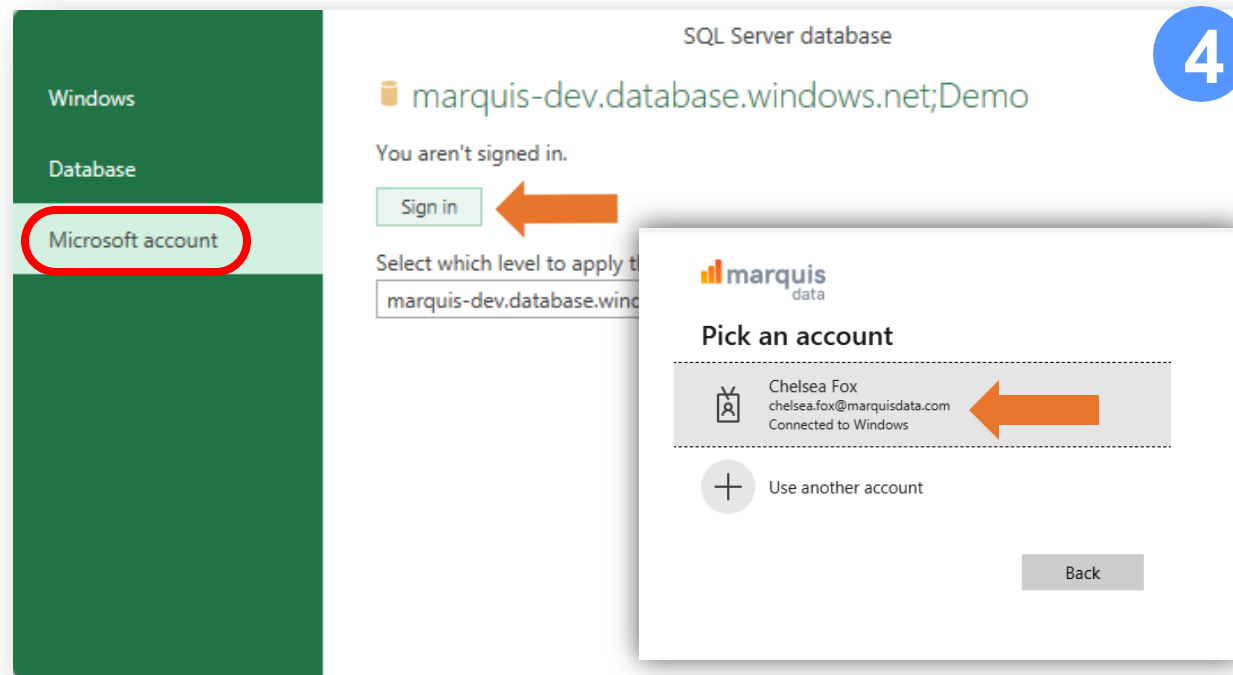
4 SELECT your Microsoft account, then click “Sign in.”

Another window will appear with your name and email address. Select your account, then click “Connect.”

Note: Sometimes it can be difficult to find the window. It may appear outside of the Excel file or behind your current window.

5 AFTER signing in

A message will appear saying, “You are currently signed in”. Click the “Connect” button.



Clearing Your Data Source in Excel

1 PRESS Data

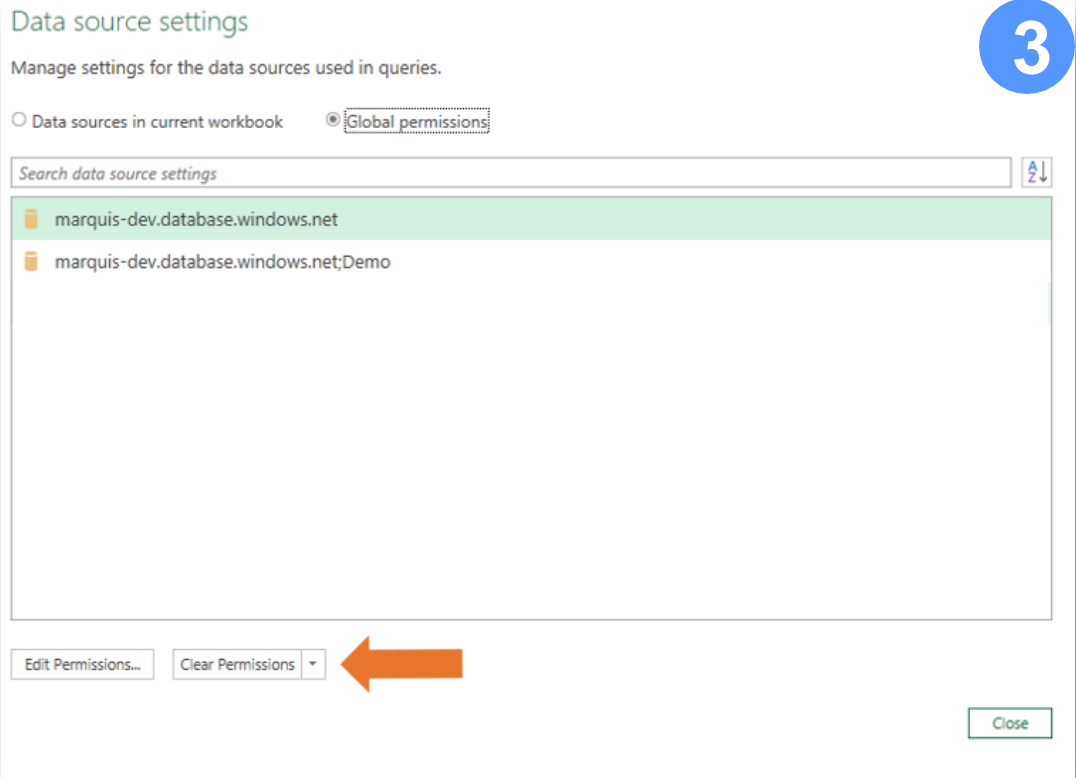
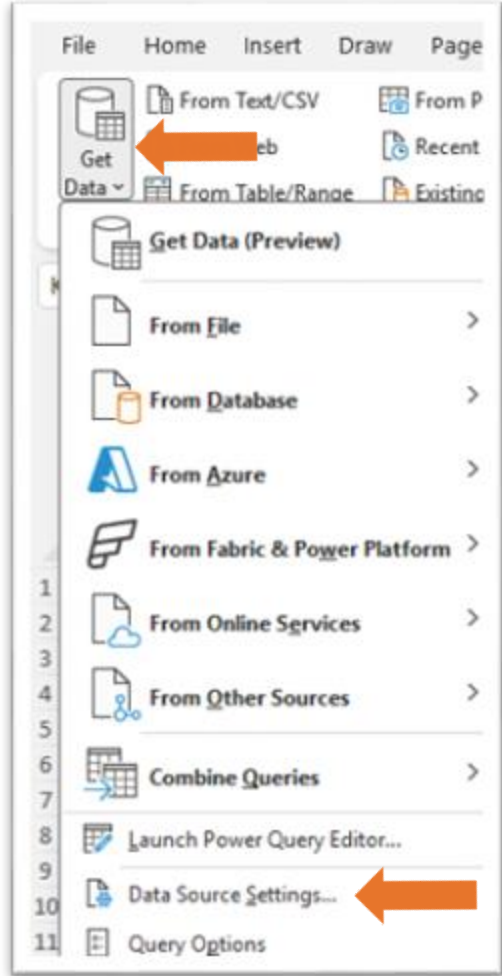
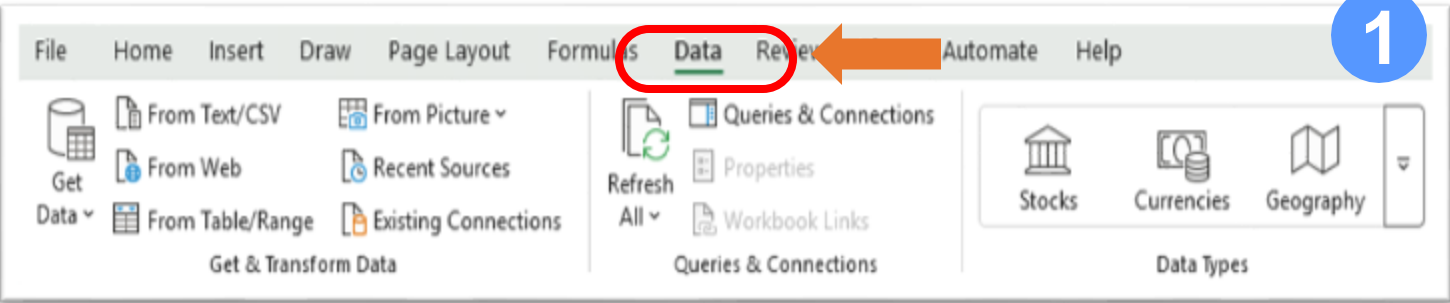
If you are having issues accessing data after connecting to an Excel file, you may need to clear your data source settings to regain access to the data. This is how you clear your data source settings to regain access to the data in the Excel file.

2 PRESS Get Data

After clicking “Get Data,” a pop-up window will appear. At the bottom of the window, select “Data Source Settings.”

3 AFTER Clicking Data Source Settings

Click “Clear Permissions.” A confirmation message will appear saying “Clear All Permissions.”



Direct Connect to Excel Troubleshooting

1 Error Accessing <http://app.marquisiq.com/>

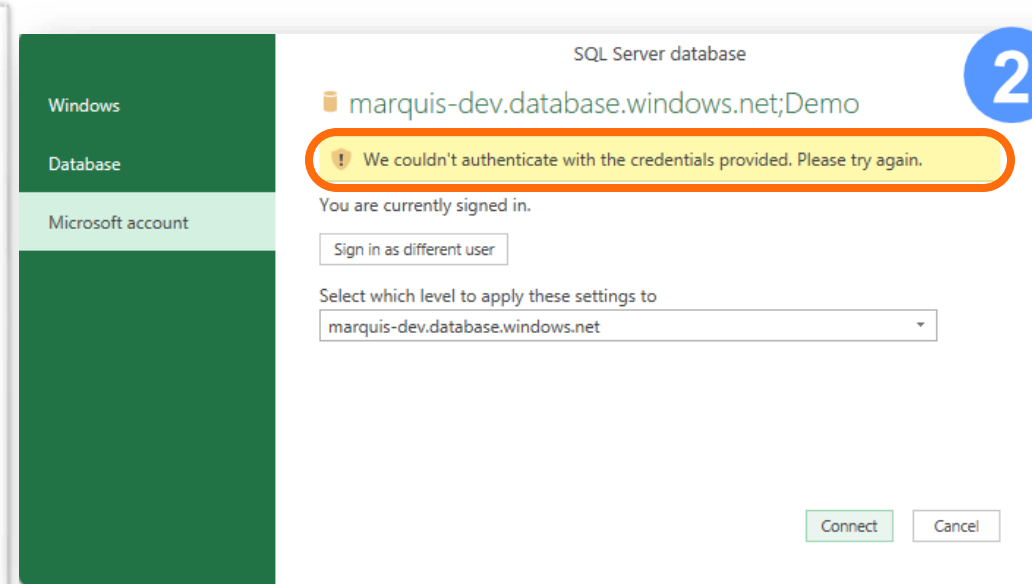
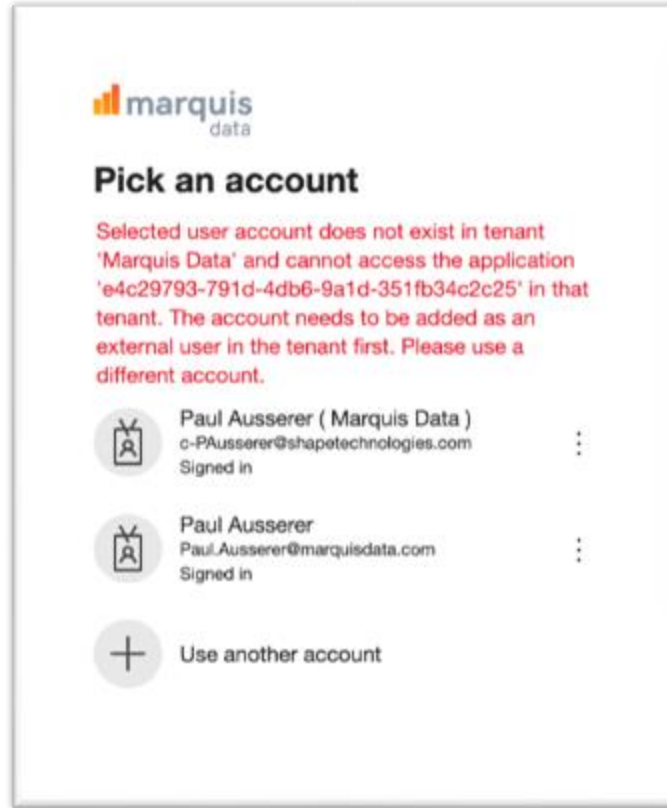
If you receive this error, please contact “support@marquisdata.com” for support.

2 Error Connecting to Excel

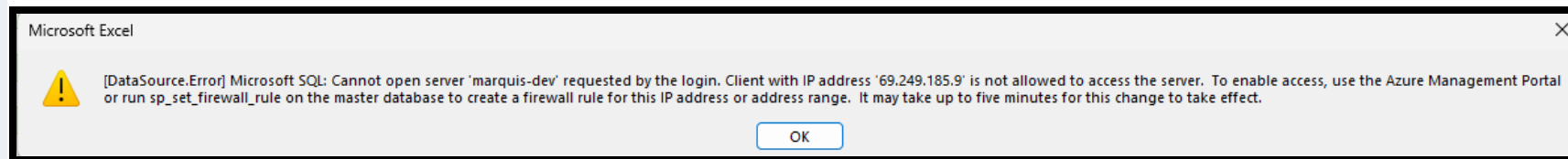
If you receive this error, please contact “support@marquisdata.com” for support.

3 Error Refreshing Excel Query

If you receive this error, your IP address will need to be whitelisted in <http://app.marquisiq.com/>. Follow the steps listed in Slide 2 to whitelist your IP address.



3



1

WE'RE HERE TO HELP

OUR TEAM IS READY TO ANSWER YOUR QUESTIONS

CALL

(888) 844-DATA

EMAIL

support@marquisdata.com

WEBSITE

www.marquisdata.com