

Importing Manager 5.9.x Database Records into an Excel Spreadsheet

The database used in Mitchell Repair and ShopKey shop management software is secured to safeguard the valuable data and prevent inadvertent modifications that could cause your software investment to fail. You may however easily import the data contained within the database to Microsoft Excel. This document explains how to use Microsoft Excel 2007 (other versions are similar). The most common fields imported into Excel are from Customer and History table. You may however import any field within the database.

Step 1: Open Microsoft Excel 2007 with a blank worksheet open as shown in Figure 1.



Figure 1

Step 2: With Excel 2007 open, select <u>Da</u>ta tab, then choose Connections as shown in Figure 2.



Figure 2



Step 3: Select 'From Other Sources'; then choose the 'From Microsoft Query' option as shown in Figure 3.



Figure 3

Step 4: After clicking on 'From Microsoft Query', the 'Choose Data Source' dialog will appear. You need to select the entry that starts with 'MMS Series ...' and click 'OK' as shown in Figure 4.

Your system may show MMS Series I 32 SU, MMS Series I 32 MU, MMS Series II 32 SU or MMS Series I 32 MU.

Databases Queries OLAP Cubes	OK
<new data="" source=""></new>	Cancel
dBASE Files* Excel Files*	Browse
MMS Series II 32 SU* MS Access Database*	Options
Shopkey Management SU* SM Static Database*	Delete

Figure 4





Step 5: The Login dialog screen will display next (as shown in Figure 5), enter the following credentials and click OK: (**Note:** The Login Name and Password must be typed <u>exactly</u> as detailed, both are case sensitive)

Login Name: CMDMricStatic Password: su3845

Data Source	ОК	Reviev	w View	Add-In
MMS Series II 32 SU	Cancel	nections erties		Y
Login name: CMDMricStatic Password: su3845	Database Help	Links ns	Z↓ Sort	Filter Sort & Filt
		F	G	Н
2				

Figure 5

Step 6: In 'Query Wizard', scroll down to find the Customer table. Click on 'Customers' and then click on the right arrow tool to add it to the query (right column) and finally click on 'Next'. This will prepare to import all the records into Excel 2007 from the Customer table.

NOTE: At least one table/column must be selected for the Next button to become available to select.

What columns of data do you want to includ Available tables and columns: Altpartno Altprice CannedJob CannedJobUsage Category Customers CustTitle	e in your query? Columr Columr mr_ms firstna compa addres city	ns in your query: D me me ename any ss	
Preview of data in selected column:	< Back	Next >	Cancel

Figure 6





Step 7: Once you have clicked on the Next button in the Query Wizard – Choose Columns dialog, the Query Wizard – Filter Data window will appear (Figure 6). You may choose to apply filters at this point that can exclude or include specific ranges of data. In this example, we will bypass the filter and click on 'Next'.

Query Wizard - Filter Da	ata	
Filter the data to specify which If you don't want to filter the d <u>C</u> olumn to filter:	n rows to include in your query. ata, click Next. Only include rows where: cust_ID	
firstname lastname spousename company address citu	C And	
state zip CustCategory 💙	C And	C Or
2	< <u>B</u> ack	Next > Cancel

Figure 7

Step 8: The next dialog to appear is Query Wizard – Sort Order as shown in Figure 8. You may use to sort the data by any field or just continue. A typical sort may be ordered by Zip Code. In this example, we will bypass the sort and continue by clicking on Next.

Query Wizard - Sort Order				
Specify how you want your data sorted. If you don't want to sort the data, click Next.				
Sort by	•	O As O De	cending escending	<u>-</u>
Then by	7	O As O De	cending escending	
Then by	Ŧ	O As O De	cending escending	
2	< <u>B</u> a	ack	<u>N</u> ext >	Cancel

Figure 8





Step 9: When the Query Wizard – Finish displays (Figure 9), you are presented with a few options. Make certain 'Return Data to Microsoft Excel' is selected and click on Finish.

Query Wizard - Finish		
 What would you like to do next? <u>Return Data to Microsoft Excel</u> <u>View data or edit query in Microsoft Query</u> <u>C</u>reate an OLAP Cube from this query 		<u>S</u> ave Query
2	< <u>B</u> ack Finish	Cancel

Figure 9

Step 10: Microsoft Excel will display the Import Data (Figure 10) dialog. Be certain the 'Existing Worksheet' option is selected and click OK.





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In a few moments, depending on the size of your database, Microsoft Excel 2007 will contain a copy of all customer records contained in the database (Figure 11). You may use Excel to manipulate the data further. Be sure and save your Excel workbook file to keep this data readily available.

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2	370	0	Tony	Green	Laura		
3	372	0	Wanda	Maddox			
4	373	0	Jeff	Greenlee			
5	376	0	Andrew	Gress			
6	379	0	Don	Grosser			
7	381	0	Brian	Guidry			
8	382	0	Karen	Guile			
9	384	0	Gaylord	Haarhues			
10	385	0	Nancy	Hahn	AI		
11	388	0	Michael	Hale			
12	389	0	Kriss	Hale			
13	390	0	Jean	Hale			
14	393	0	Dan	Hamilton			î
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Figure 11

Your shop management software is fully capable of providing many useful reports using data that has already been decided upon and rendered by the program. You may be able to select a date range, category or other parameter but sometimes you want to see more than the standard reporting options.

This document showed you the step-by-step process of setting up Microsoft Excel to access your shop management database to utilize the data in your spreadsheets, where it can be re-sorted, filtered and looked at in a whole new way. Once you have this linkage setup, you will be able to have many new ways to look at your business data, by zip code, dollars spent or anything else you can dream up using the shop management data on the Excel playing field.

The good news is that you typically go through this process only once to establish the data connection (until you upgrade your computers or versions of Microsoft Excel). Once connected, you'll be able to concentrate on creating different spreadsheets taking full advantage of increased data access.