

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.

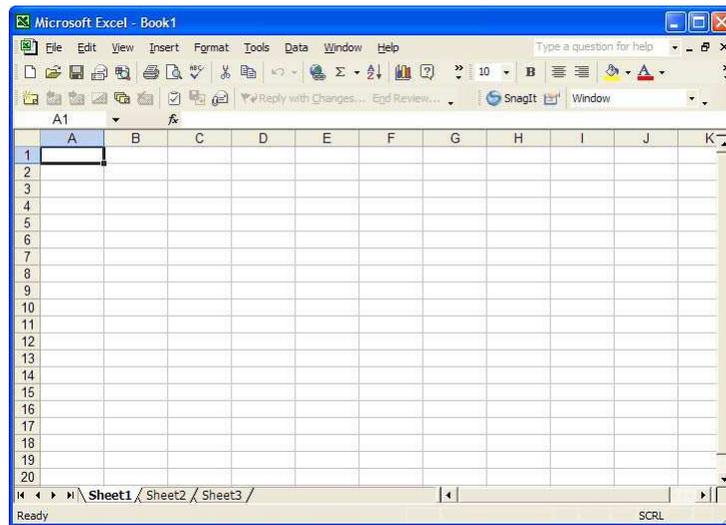


Figure 1

Step 2: With Excel 2007 open, select Data tab, then choose Connections as shown in Figure 2.

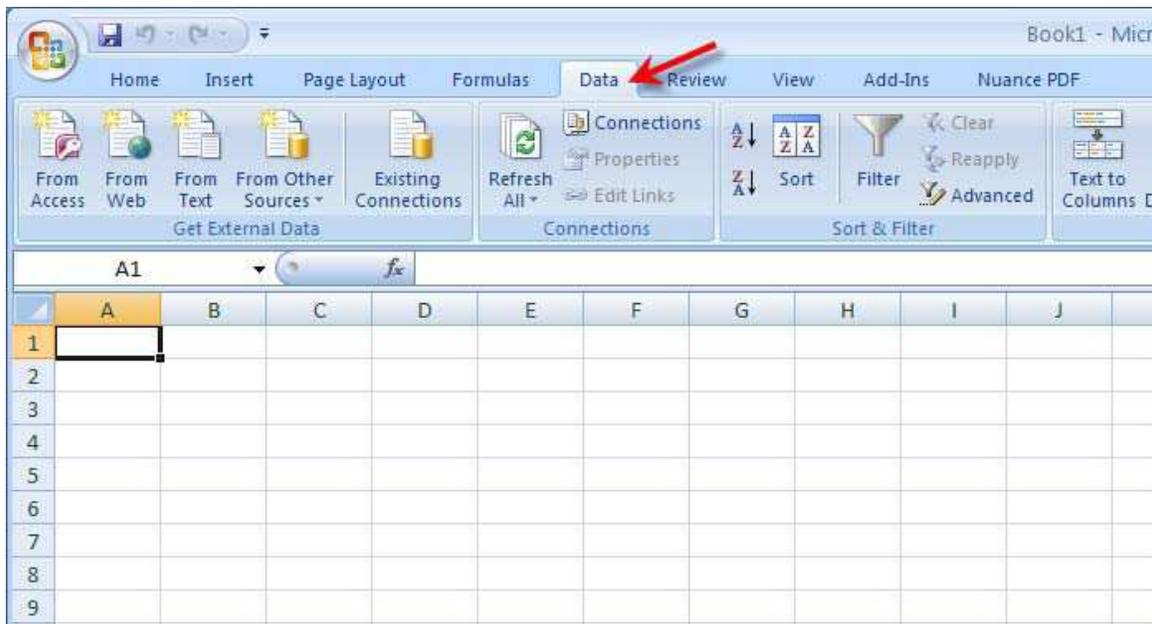


Figure 2

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

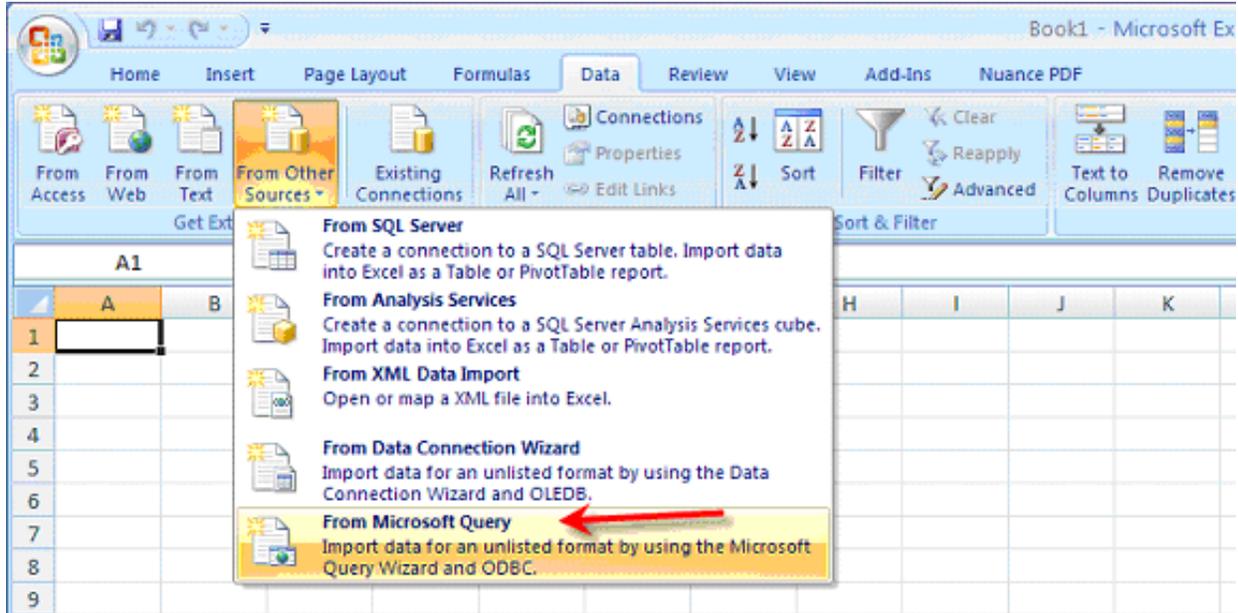


Figure 3

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.

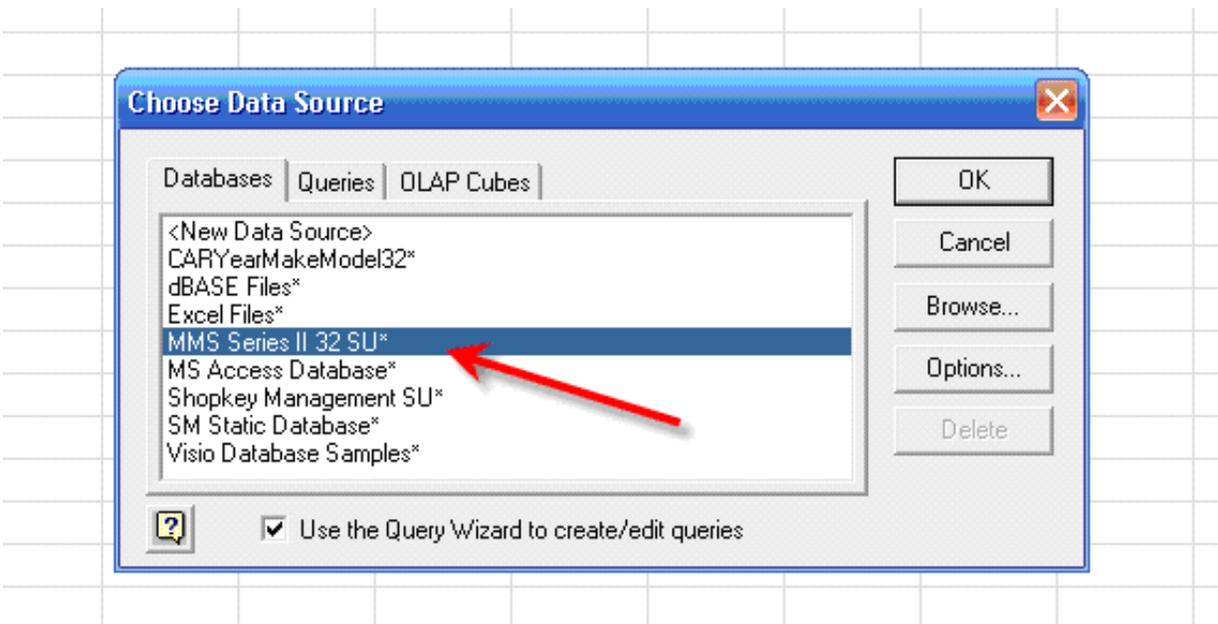


Figure 4

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 exactly as detailed, both are case sensitive)

Login Name: CMDMricStatic

Password: su3845

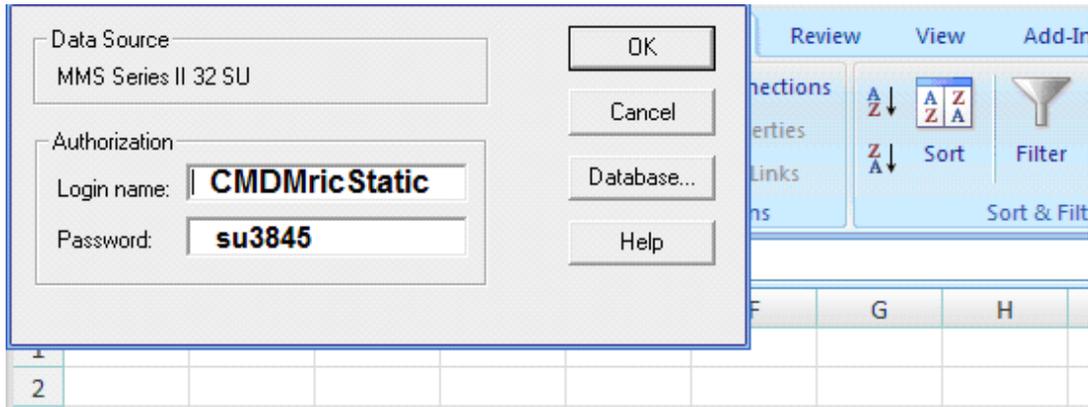


Figure 5

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.

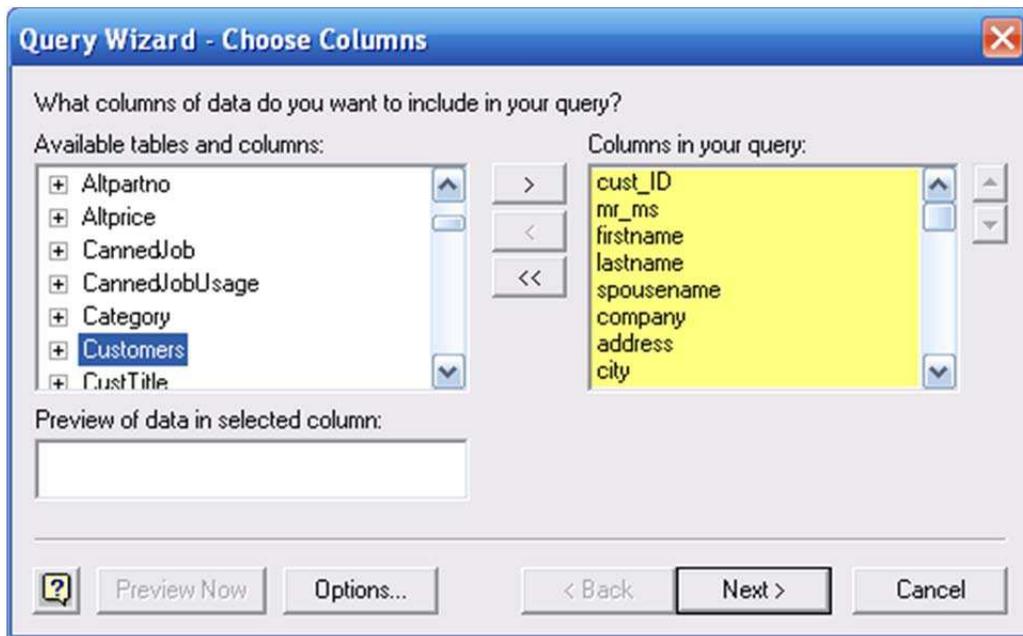


Figure 6

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'.

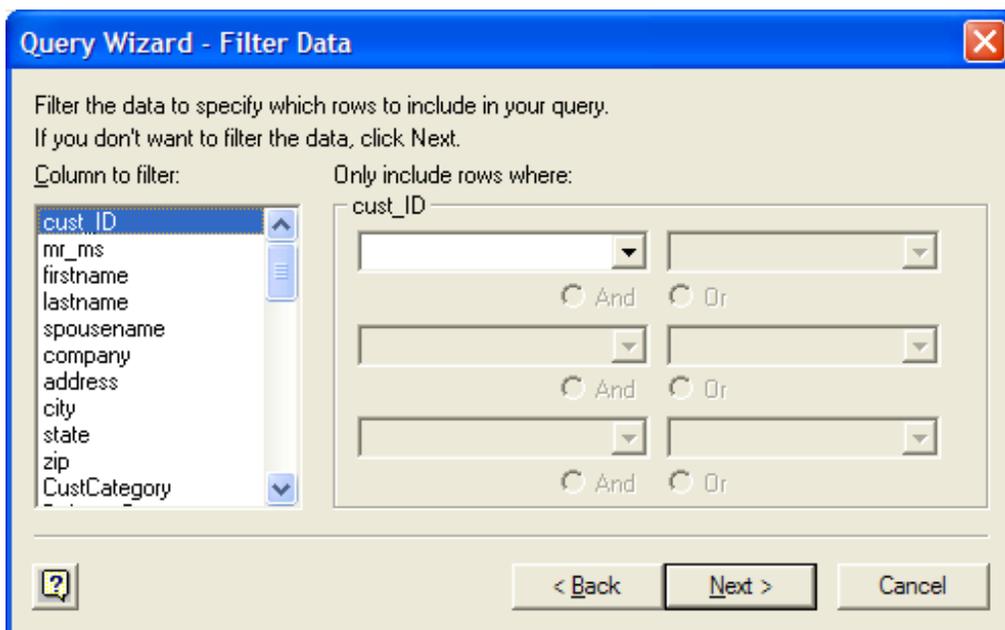


Figure 7

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.

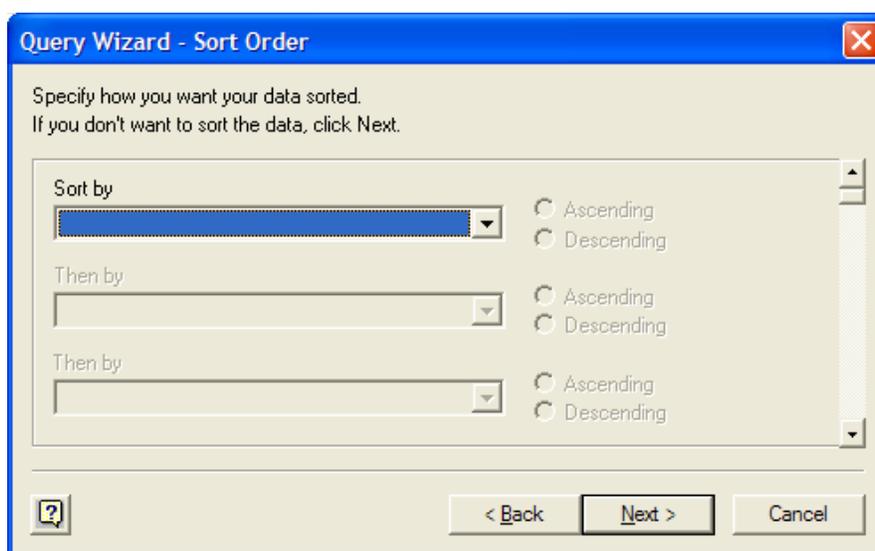


Figure 8

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.

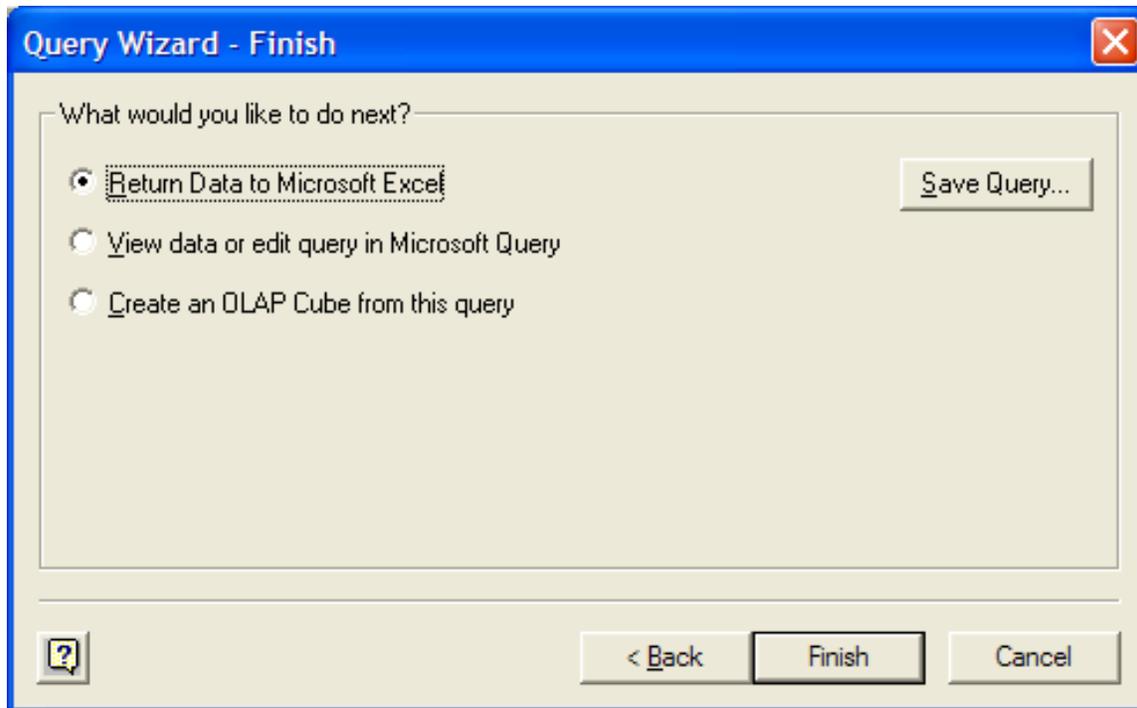


Figure 9

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

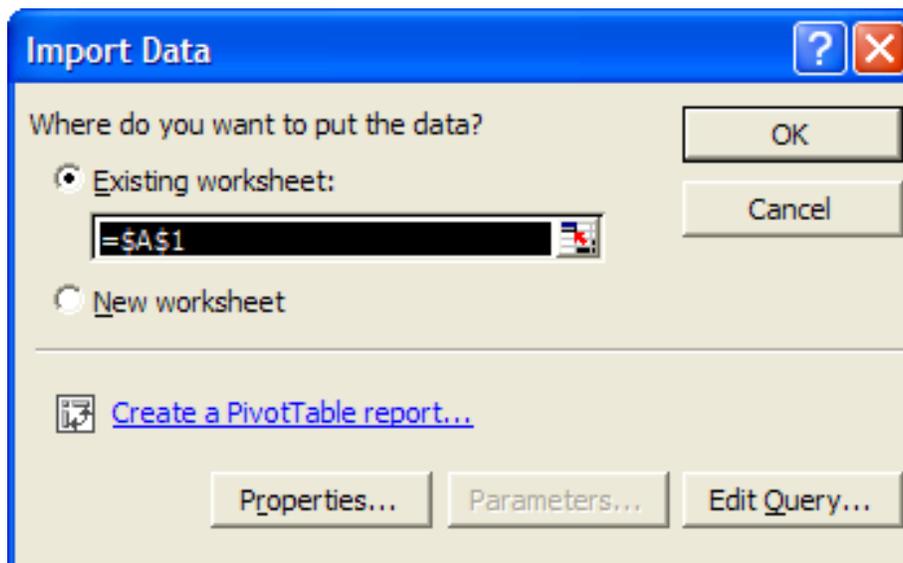


Figure 10

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.

	A	B	C	D	E	F
1	cust ID	mr_ms	firstname	lastname	spouse name	company
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	Al	
11	388	0	Michael	Hale		
12	389	0	Kriss	Hale		
13	390	0	Jean	Hale		
14	393	0	Dan	Hamilton		
15	396	0	Tom	Hancock		
16	398	0	Tom	Hanson		
17	401	0	Chuck	Harguth	Mary	
18	403	0	Rosalie	Harlan	John	

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.