

Using Excel to Access Sales Data from Microsoft Dynamics

As part of the Progress Pacific platform, DataDirect Cloud simplifies access to cloud and on premise data sources for your applications and business intelligence tools.

In this tutorial you will learn how to view MS Dynamics sales data in Excel using DataDirect Cloud. This tutorial assumes that a data source for Microsoft Dynamics is already established in DataDirect Cloud and the ODBC driver has been installed and configured to use the Microsoft Dynamics data source.

Prerequisite: Getting Started with DataDirect Cloud & Configuring DataDirect Cloud for use with ODBC

Step	Description
1.	In this video you will learn how to view sales data from Microsoft Dynamics CRM in Microsoft Excel using DataDirect Cloud.
2.	<p>To try these steps yourself, you must have two data sources already set up: a DataDirect Cloud data source definition to connect to your Microsoft Dynamics account, and a local ODBC data source set up to connect to DataDirect Cloud.</p> <p>Refer to the videos on these subjects found at www.progress.com/products/pacific/help</p> <p>The steps to connect excel to Microsoft Dynamics differ depending on the version of Excel you are using. This example demonstrates the steps required by Microsoft Excel 2007.</p>
3.	First, we need to connect Microsoft Excel to our existing local ODBC data source. Select the Data tab on the ribbon.
4.	From the Get External Data group, click From Other Source and select From Microsoft Query.
5.	The Choose Data Source dialog box appears. The data source for my DataDirect Cloud connection to Microsoft Dynamics CRM (ODBC_DDC_MSD) shows in the list of databases. Pick the data source and click OK.
6.	You are prompted to enter your DataDirect Cloud account credentials. Enter your login information, and click OK.
7.	<p>You can now navigate the Schema of the Microsoft Dynamics data to gather the information you require. In this example, we require basic sales information for a region.</p> <p>From the Add Tables window, click Add, and choose the Account table. Then close the Add Tables dialog.</p>
8.	From Microsoft Query under the Records menu, select Add Column. Use the dropdown list to navigate to the field, select it, and click Add. Do this for the following fields:

	<ul style="list-style-type: none">• Name• PrimaryContactID• PrimaryContactIDOmiName• Revenue <p>Click Close to exit the Add Column window.</p>
9.	Now we'll filter the results to just include contacts in Texas. From the Criteria menu, select Add Criteria. The Add Criteria dialog appears. In the Field dropdown box select Address1_StateProvince. For the Value enter TX and click Add. Then click Close. The selected data is filtered and displays in Microsoft Query.
10.	One more step is required to import the data into the spreadsheet. From the File menu, select Return Data to Microsoft Excel.
11.	You are prompted to select how you want the data to be imported. For this example I select Table and retain the default Worksheet value. Then click OK. My spreadsheet now contains the contact and revenue information I need for a sales report.
12.	This completes our look at using Microsoft Excel to access Sales data from a data source (in this case, Microsoft Dynamics CRM).
