

Accessing Legrand CRM data using Microsoft Query

Overview

Legrand CRM databases are accessible via ODBC compliant applications. One such application is Microsoft Excel. Microsoft Excel includes a database query tool, Microsoft Query. Although quite restricted in its capabilities Microsoft Query provides a convenient way to extract data from ODBC compliant data sources. If installed as one of the Excel components Microsoft Query will be available in your Excel session under the Data menu.

Benefits:

1. Provides access to all the tables and fields in Legrand CRM
2. Create additional reports.
3. Automate adding data from Legrand CRM into existing Excel spreadsheets
4. Access to the data is read only and therefore no threat to overwriting or deleting data.

NOTE: This document is meant to simply point out that Microsoft Query is a readily available tool to extract data from Legrand CRM. It is not meant to be detailed instructions on all aspects and capabilities in Microsoft Query. Use **Help** menu from the Microsoft Query screen for detailed help.

System requirements

- Visual FoxPro ODBC driver
- Version of Microsoft Excel that includes Microsoft Query
- Access to folder with Legrand CRM database.

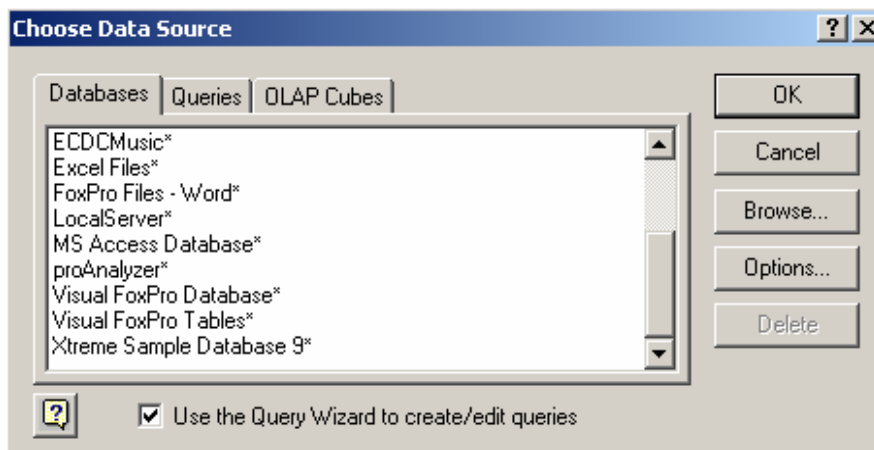
Legrand CRM requirements

- No special requirements.

Step 1 – Excel setup

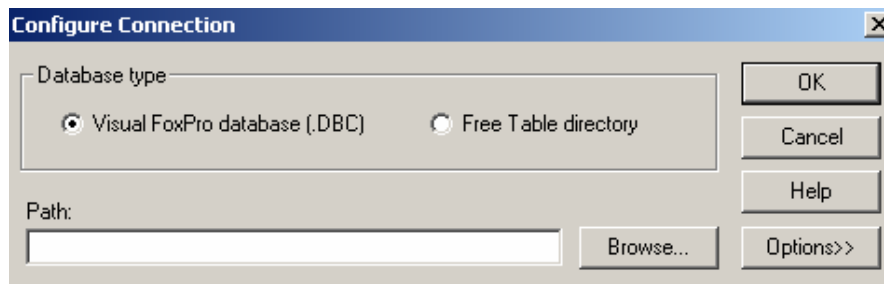
These steps assume that you have Excel, Microsoft Query and Legrand CRM installed with access to a Legrand CRM database.

1. Start Excel and open a new spreadsheet.
2. Select **Data>Get external data>New database query**. You should be presented with the following



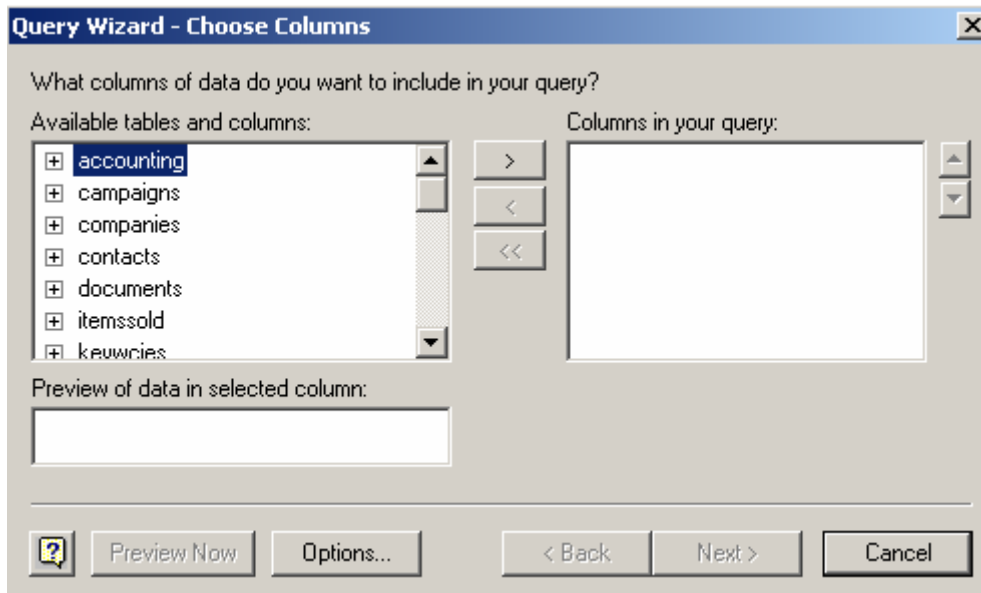
window. If Visual FoxPro Database selection is not visible then see XXXX to install the required ODBC driver.

3. Select **Visual FoxPro Database>OK**
4. Select the **Visual FoxPro database (.DBC)** radio button.

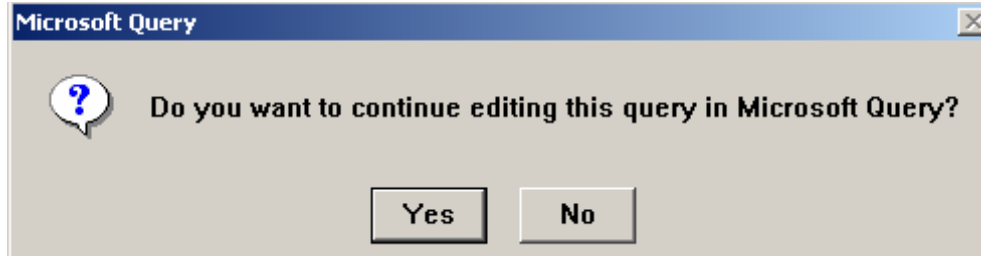


5. Use the **Browse** button navigate to your Legrand CRM directory and select the filename CRM.dbc.

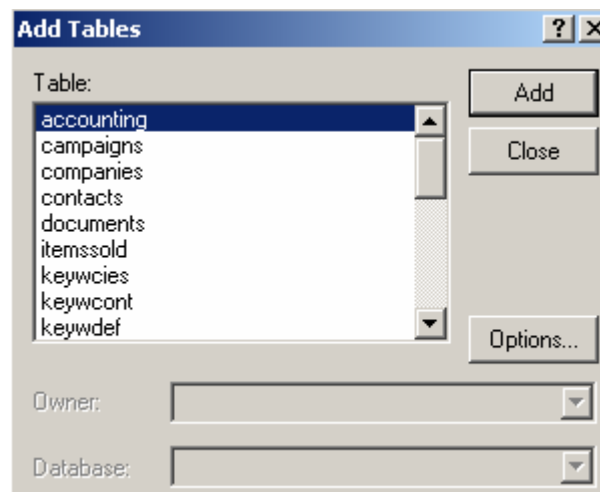
6. The next dialogue box presents the Legrand CRM data tables. Click on the **Cancel** button.



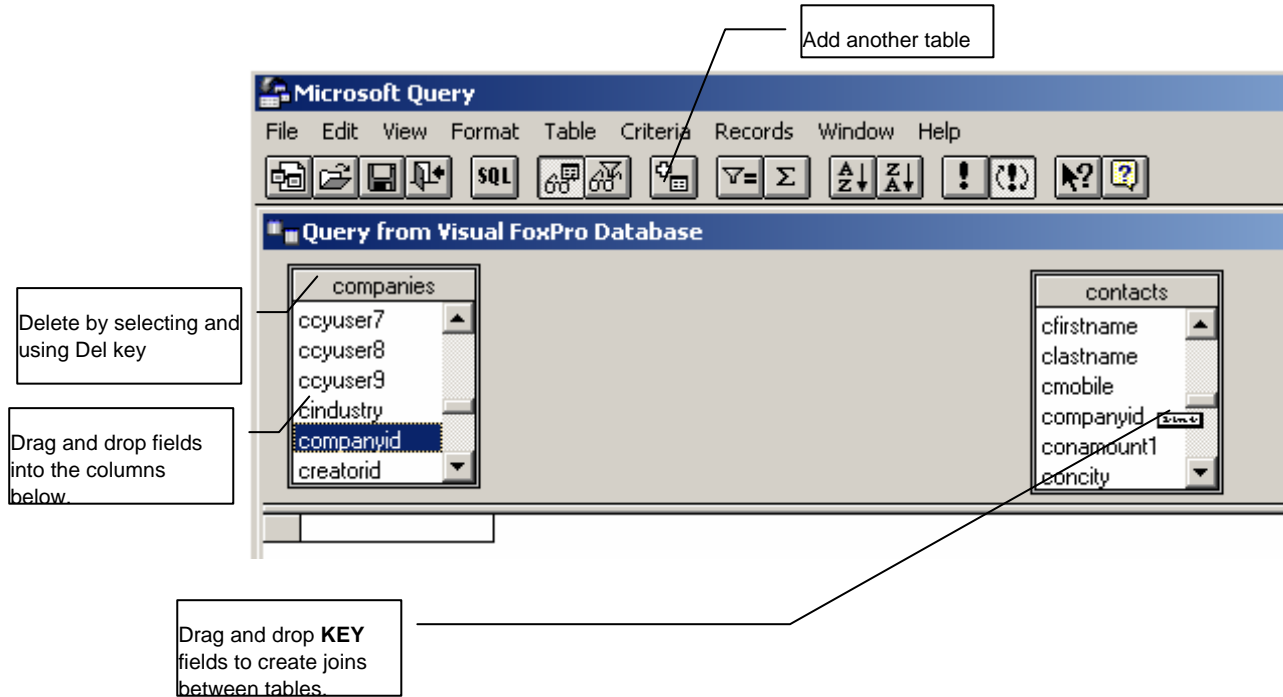
7. Select **Yes** button.



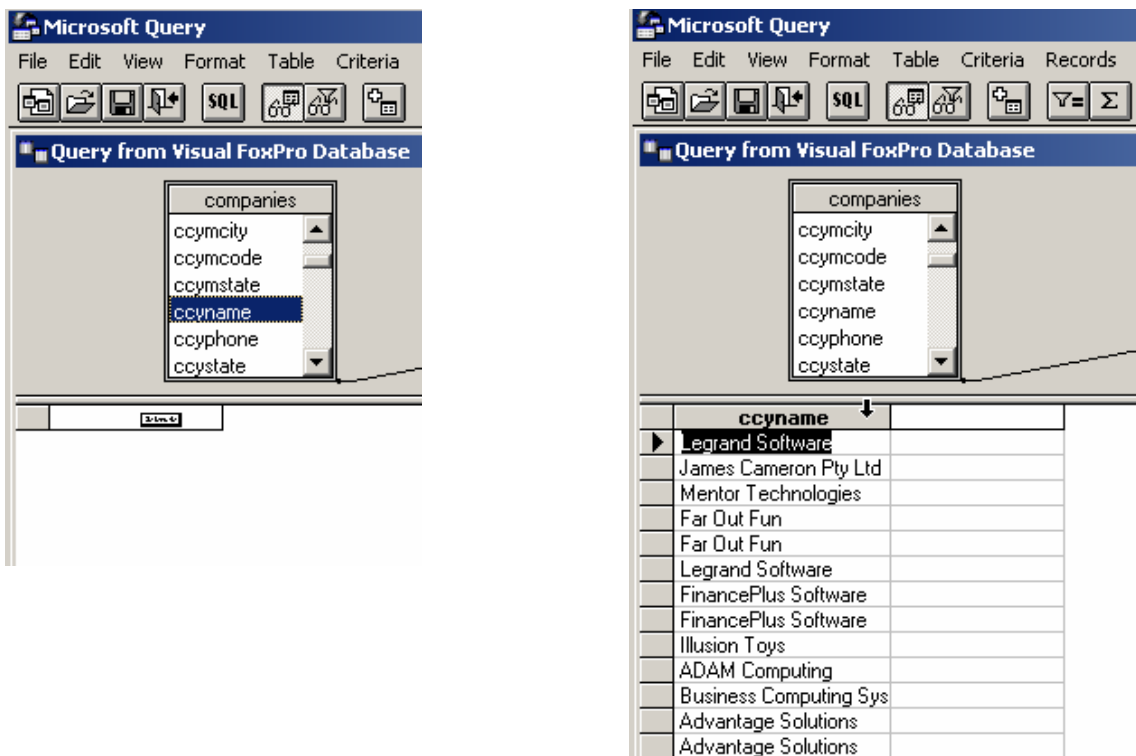
8. Using this screen choose and **Add** at least one table. You can change and add tables in the next screen so don't be too fussed. Select the **Close** button when completed.



9. Microsoft Query tool bar and menu bar. Some tips in setting up the query.



10. Dragging a field into the column will produce this result.



Understanding data

If your knowledge of databases is quite good then there is little else that requires explanation at this point as you will have some idea of how to go about achieving your required results. However, if your knowledge of databases is limited but you want to extract data then following is a very simple explanation which may help.

Tables, Rows and Columns

A table is similar to an excel spreadsheet. It contains rows and columns in which data can be stored. For example, a table could be named Companies and contain a column for Name, the next column for Address. Each row would then contain the name of a new company and address.

Another table could be names Contacts with columns and rows of data. But how do you relate the Contact to the Company? Create another column with as an identifier, say CompanyID. Create the same column name in the Company table.

So, when you browse through the data tables in Legrand CRM you will find identifiers that match with that of another table. In the Company and Contact example the fieldname for the identifier is in fact **companyid**.

Joins

In simple terms, a join between two tables is when a field in each table are compared to find matching values. In the above example, joining Company and Contacts with the CompanyID field means that only Contacts with the same CompanyID as the CompanyID in Company will be displayed.

companyid	ccyname	companyid	cfirstname	clastname
_CYLEGRAND	Legrand Software	_CYLEGRAND	Peter	Vasey
_OC119J2LK	James Cameron Pty Ltd	_OC119J2LK	Sally	Smyth
_OC119QU1B	Mentor Technologies	_OC119QU1B	George	Hansper
_OC11A0N9D	Far Out Fun	_OC11A0N9D	Ted	Edwards
_OC11A0N9D	Far Out Fun	_OC11A0N9D	Kate	Kelly
_CYLEGRAND	Legrand Software	_CYLEGRAND	Nicola	Ruse
_OC11A4USZ	FinancePlus Software	_OC11A4USZ	Kevin	Feary
_OC11A4USZ	FinancePlus Software	_OC11A4USZ	Ami	Sorrenson

CompanyID field in Company table used to find matching Contacts

Note: There is no need to actually display or extract the ID field. The screenshot above shows the ID field to demonstrate a join.

Conclusion

When using Excel to collate data, Microsoft Query can be easily implemented to populate fields with data. For more complex data reporting requirements, dedicated tools can be purchased more suited for that purpose.

Remember to check www.legrandcrm.com for software update announcements.

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