



2 ways to see combined account and order data

Understand which types of accounts generate the most revenue for your company by viewing sales orders based on customer type and industry. This data can help you decide where to target your marketing and sales efforts.

To analyze your orders, you must be able to view data from two related Microsoft Dynamics CRM 3.0 record types: account records and order records. This article shows two methods to get data from those Microsoft CRM record types into Microsoft Office Excel. One method uses SQL Query and the other uses the Microsoft Query Wizard. Both methods require advanced Excel skills.



Export accounts and edit the SQL query

You start by exporting account data and conclude by editing the SQL query directly to add the order data.

To export accounts

1. In Workplace, under **Customers**, click **Accounts**. In the **View** box, select **Active Accounts**.
2. Click **Export to Excel**.
3. Select **Dynamic worksheet**, and then click **Edit Columns**.
4. Click **Add Columns**, select **Category**, **Customer Size**, and **Industry**, and then click **OK**.
5. Select **Primary Contact**, and then click **Remove**. Also remove **Main Phone** and **Address 1: City**, and then click **OK**.
6. Click **OK**, and then click **Export**.
7. Click **Open**, and then click **Enable automatic refresh**.

To edit the SQL Query

1. Right-click the data, and then click **Edit Query**. Click **OK** twice to see the two messages that pop up.
2. Microsoft Query opens. Click the **SQL** button.
3. The following SQL statement appears:

```
SELECT account.name, account.industrycodename,
       account.customersizecodename,
       account.accountcategorycodename
FROM FilteredAccount as account
WHERE (account.statecode = 0)
ORDERBY account.name asc
```

4. Replace the SQL statement with the following code, which joins the **FilteredAccount** and **FilteredSalesOrder** entities, and displays two fields from the **FilteredSalesOrder** entity, **totalamount** and **submitdate**:

```
SELECT    account.name,
          account.accountcategorycodename,
          account.industrycodename,
          account.customersizecodename,
          order.totalamount, order.submitdate
FROM      FilteredAccount as account,
          FilteredSalesOrder as order
WHERE     account.accountid = order.accountid,
          (account.statecode = 0)
ORDERBY  account.name asc
```

To view the data in Excel

1. On the **File** menu, click **Return Data to Microsoft Excel**, and then click **OK**. Select where you want to put the data, and then click **OK**.
2. To save your new report, on the **File** menu in Excel, click **Save As**, and then specify a file name.
3. To refresh the data from Microsoft CRM, on the **Data** menu, click **Refresh Data**.
4. If you prefer to see your data in a PivotTable, on the **Data** menu, click **PivotTable and PivotChart** report, and use the wizard to create your PivotTable or PivotChart.

Create a query using the Microsoft Query Wizard

You use the Microsoft Query Wizard, a component of Excel, to define the query that pulls data from accounts and orders. Because this approach does not start with a direct export from Microsoft CRM, the first step requires you to create a data source for the Microsoft CRM database.

To create the data source

1. In an empty worksheet in Microsoft Office Excel, on the **Data** menu, point to **Import External Data**, and then click **New Database Query**.
2. Click **<New Data Source>**, and then click **OK**.
3. In the **Create New Data Source** dialog box, type a name for the data source, and then in the driver list, select **SQL Server**.
4. Click **Connect**.
5. In the **SQL Server Login** dialog box, in the **Server** box, type the name of the Microsoft SQL Server where the Microsoft CRM database is stored, and then click **Options**.
6. In the **Database** box, select *Organization_MSCRM*, and then click **OK** three times. The Query Wizard opens.

To select the filtered views to include

1. In the **Available tables and columns** list box in the Query Wizard, expand the **FilteredAccount** view. This view shows all the data from account records.
2. Select the **name** field. Because the **name** field is a mandatory field in Account, there is data for every record. You can choose the other fields in your spreadsheet in a later step.
3. Click **Next** three times. In the **Query Wizard – Finish** dialog box, select **View data or**

edit query in Microsoft Query, and then click **Finish**.

4. Microsoft Query opens. On the **Table** menu, click **Add Tables**, and then click **FilteredSalesOrder**. This view shows all data from order records.
5. Click **Add**, and then click **Close**.

To define the connection between FilteredAccount and FilteredSalesOrder

1. Adjust the width of the two filtered views so that the field names are completely visible.
2. In **FilteredAccount**, adjust the vertical scroll bar so that the **accountid** field is visible. In **FilteredSalesOrder**, adjust the vertical scroll bar so that the **accountid** field is visible.
3. Drag **accountid** from **FilteredAccount** to **accountid** in **FilteredSalesOrder**. Microsoft Query draws a line between the two fields, indicating that it has done a database join on the two filtered views based on data in these fields.
4. Drag the **accountcategorycodename**, **customersizecodename**, and **industrycodename** fields from **FilteredAccount** to the column section of the query.
5. Drag the **totalamount** and **submitdate** fields from **FilteredSalesOrder** to the column section of the query.
6. On the **View** menu, click **Criteria**.
7. In the first criteria column, expand the width to about three inches. Then, in the first **Criteria Field** field, select the **FilteredSalesOrder.submitdate** field.
8. In the first **Value** field, type **> 01/01/2006**. This specifies orders placed in 2006.
9. On the **Records** menu, click **Query Now**.

To view the data in Excel

1. On the **File** menu, click **Return Data to Microsoft Excel**, and then click **OK**. Select where you want to put the data, and then click **OK**.
2. To save your new report, on the **File** menu in Excel, click **Save As**, and specify a file name.
3. To refresh the data from Microsoft CRM, on the **Data** menu, click **Refresh Data**.
4. If you prefer to see your data in a PivotTable, on the **Data** menu, click **PivotTable and PivotChart** report, and use the wizard to create your PivotTable or PivotChart.

Add the Excel report to Microsoft CRM

Now that you have created the Microsoft Excel file that includes orders and accounts, you can add it as a report in Microsoft CRM so that it is available to all Microsoft CRM users from the Accounts or Orders areas.

Because you used filtered views when you selected the data to display, other users see accounts and orders that they have permission to view. For all users, data refreshes each time the file opens.

To add the report for all users, you must have a security role with the Manage Reports privilege, such as the System Administrator or System Customizer security role.

To add the spreadsheet as a report

1. In Workplace, under **My Work**, click **Reports**, and then click **New**.
2. Click **Browse**, browse to the file you saved, and then click **Open**.
3. In **Related Record Types**, select **Accounts** and **Orders**, and then click **OK**.
4. In **Display In**, select **Lists for related record types**. Because you selected **Accounts** and **Orders** in the **Related Record Types**, this report appears in the Report list available from the Accounts and Orders areas.
5. Click **Save and Close**.
6. To see how the report looks in Microsoft CRM, on the **Go To** menu, point to **Sales**, click **Accounts**, and then click the **Reports** icon.

With the data in Excel, you can now analyze your orders and take necessary action. And, by learning how to combine data from two record types in Excel, you've opened up many reporting possibilities.