

How to configure a ODBC connection to use ESMETA SALES MANAGER.



Juan Antonio Breña Moral
bren@juanantonio.info

This document has been written to explain how to connect your Sales data with ESMETA SALES MANAGER, a Sales tool developed using R Technology to improve Sales Management process.

The key of the modern tools developed to improve sales management is how to manage the sales data. If your company use a ERP System, Enterprise Resource Planning as SAP, NAVISION, ORACLE, etc... and your Sales/Marketing Department don't have any CRM tool or a Sales Dashboard/Scorecard tool, ESMETA SALES MANAGER can help you.

Any Sales/Marketing Manager have to dominate the following dimensions:

- Budget
- Customers
- Geographical areas
- Salesperson performance
- Categories
- Products
- Sales
- Profits
- Financial balance

To improve the results of:

- Strategic plan
- Sales Budget
- Customer life cycle
- Salesperson performance
- Financial balance

The first Step to improve your results is to know how/where your company store the sales data. Sales information can be stored in:

1. ERP System with Database
2. Non ERP System with Database
3. Database
4. Excel Spreadsheet
5. Others

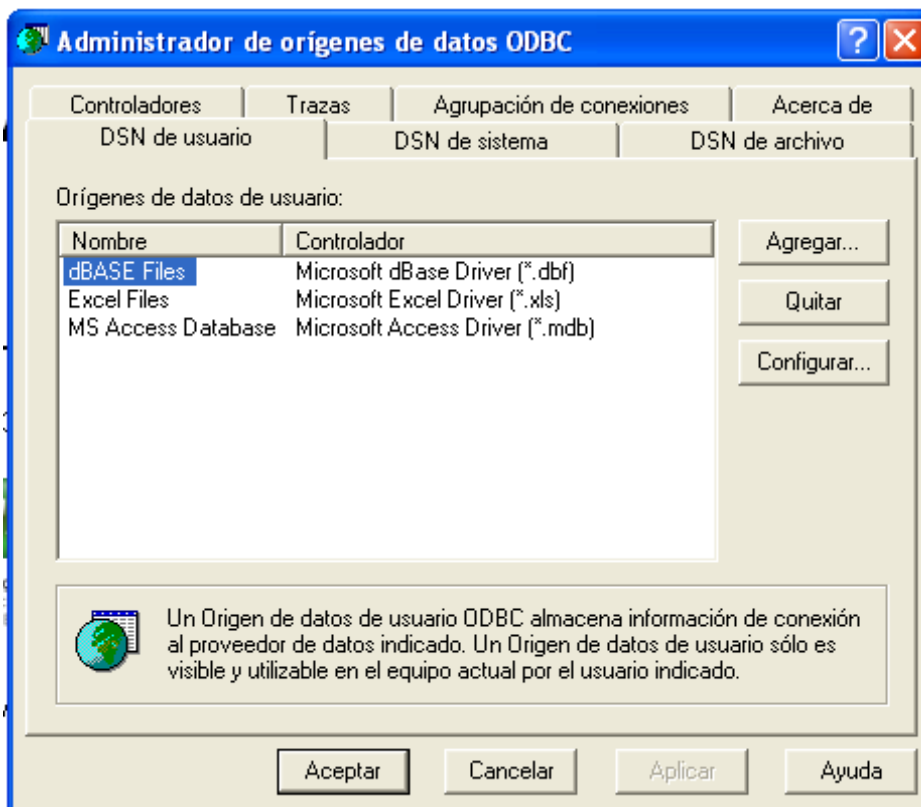
When you know it, you should connect your data using ODBC. To install the correct ODBC Driver of your sales data storage system, make a request to the IT Manager of your company. When you have installed the ODBC Driver, you should follow the steps:

Step1. Create a ODBC Driver

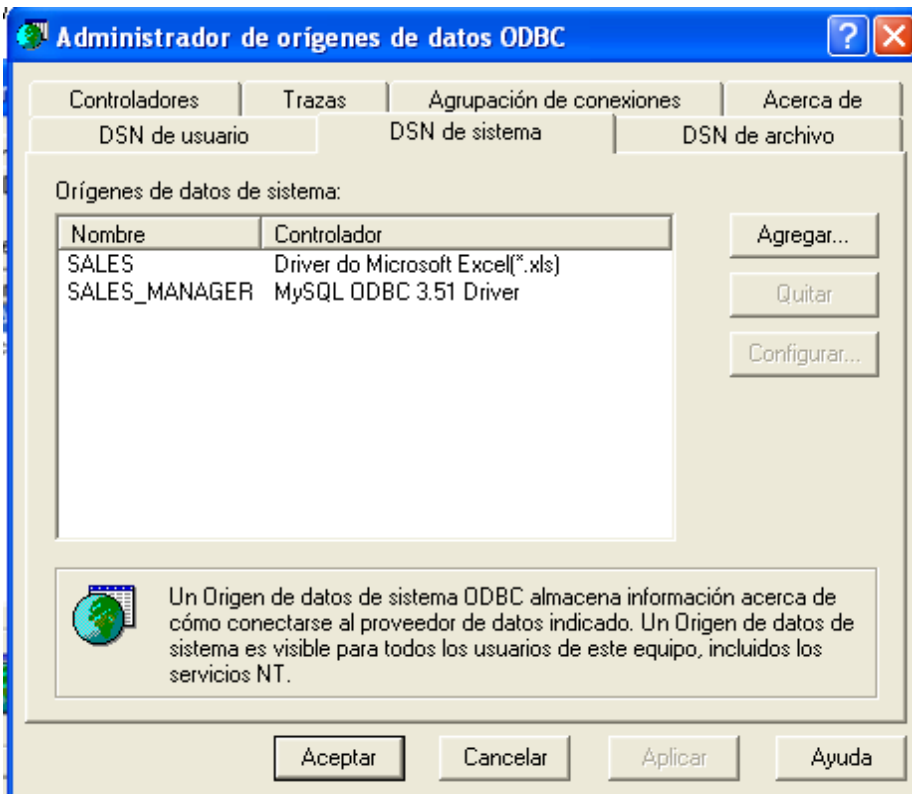
Start > Control Panel > Admin tools > Data Sources (ODBC)



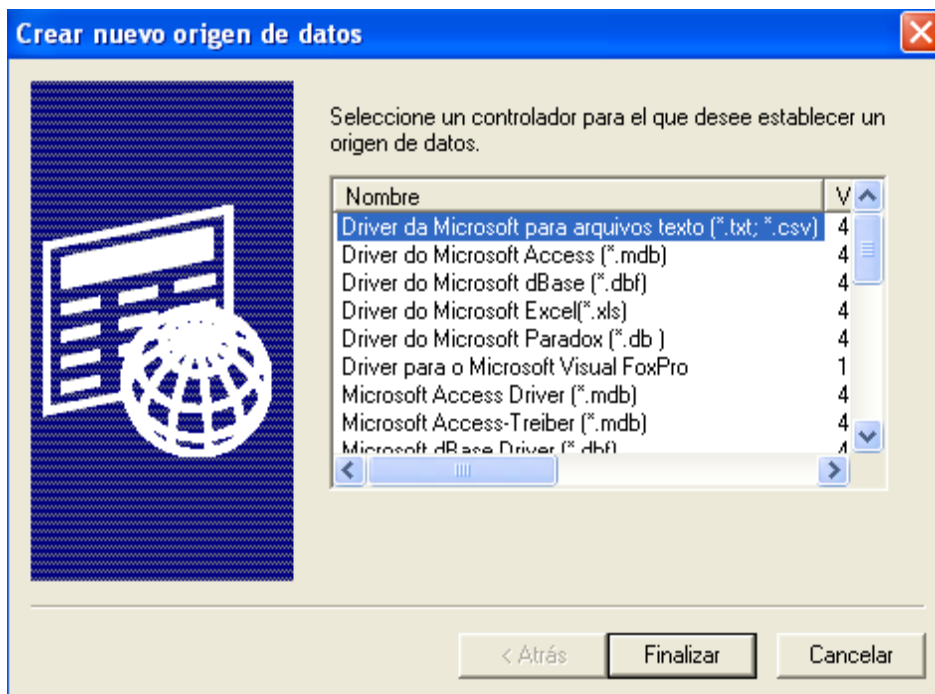
When you see Data Sources (ODBC) Window:



Click in DSN system to set a new ODBC connection:

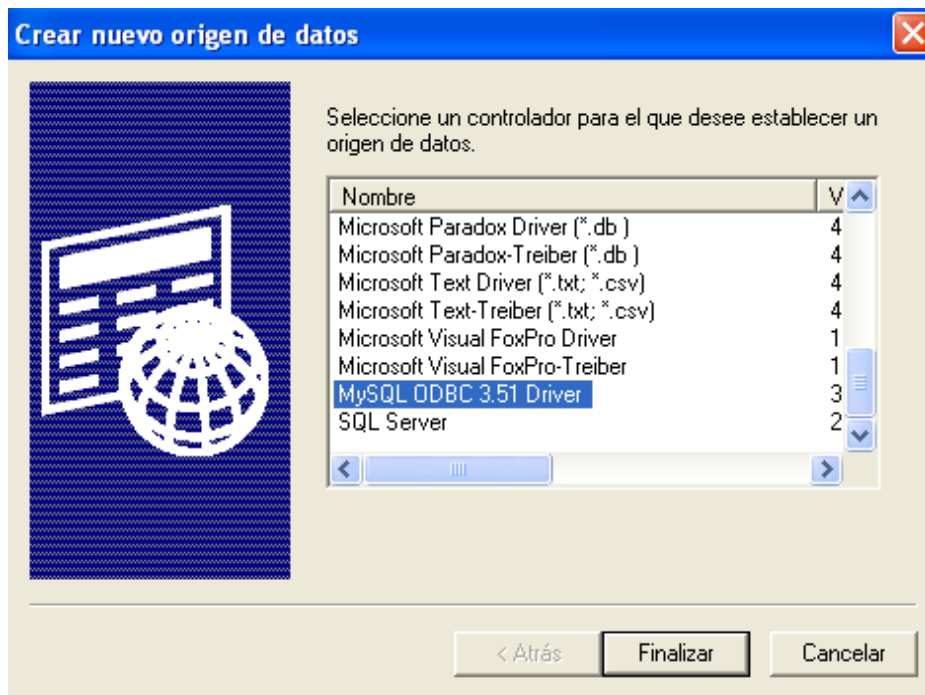


In this window, you can see the ODBC connections that it has been configured. To create a new ODBC connection, click in new ODBC connection: **Agregar...** then you will see a new window with different options:



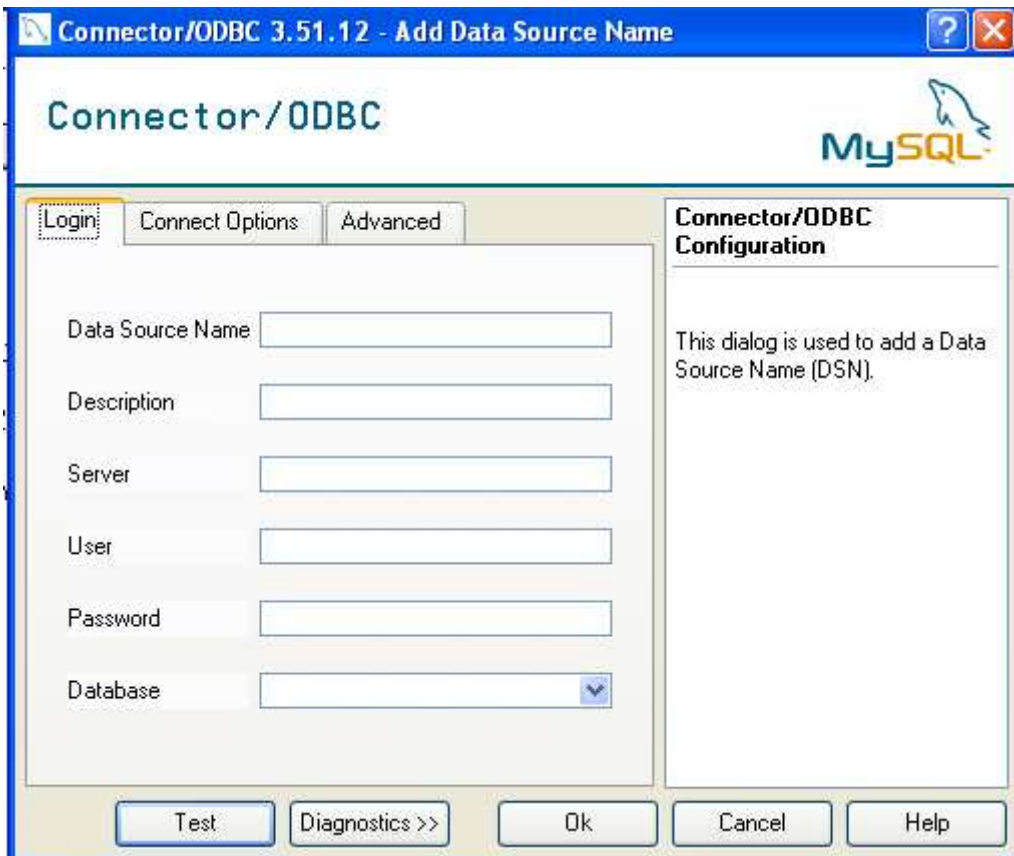
make a request to your IT Manager of your company to install the correct ODBC Driver, then you will see the connection option where your sales data are stored.

In this example, I use MySQL to store Sales Data then I choose MySQL ODBC Driver.

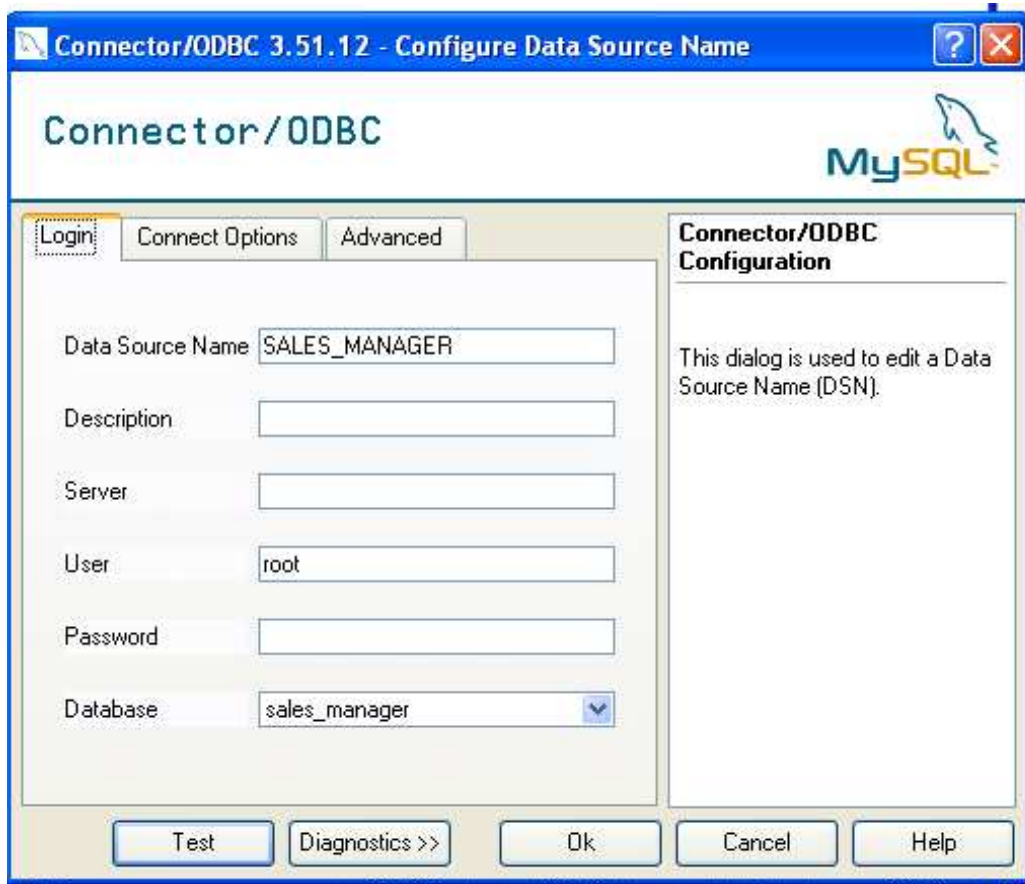


You can download MySQL ODBC Driver in the website of MySQL.

If you accept the new ODBC connection, **Finalizar** then you will see a MySQL ODBC Data Source Window:



If you want to use ESMETA SALES MANAGER, the name of the Data Source will be "SALES_MANAGER". Normally when you use MySQL Server, the name of the default user is root and this user don't have any password and the name of the Database where you store the sales data:



At the end you will test the connection and if the test is successful:



Then click in Ok button and you have a ODBC to connect your sales data with ESMETA SALES MANAGER