Three Simple Steps for a Successful MIE Trak Pro/Workbooks Integration

Are you considering integrating MIE Trak Pro with Workbooks, but concerned about downtime, or the difficulty involved?

The MIE Trak Pro / Workbooks integration can be performed in just a few simple steps, in a matter of minutes, from your own computer... there are no files to download, no complex configuration to be performed, and no on-site implementation needed.

Ready to Get Started? Contact us TODAY to Start Streamlining Your Business!

sales@mie-solutions.com

(714) 786-6230, ext. 2

What Integrates?

MIE Trak Pro to Workbooks:

- Invoices goes into Customer Transactions
- Items (Inventory) goes into Products
- Aging goes into Organizations

Workbooks to MIE Trak Pro:

Customer Orders go to MIE Trak Pro as Electronic Sales Order and becomes a PO after processing

Organizations and People go Both Ways

MIE Trak Pro / Workbooks Integration

1. Create an API in Workbooks.

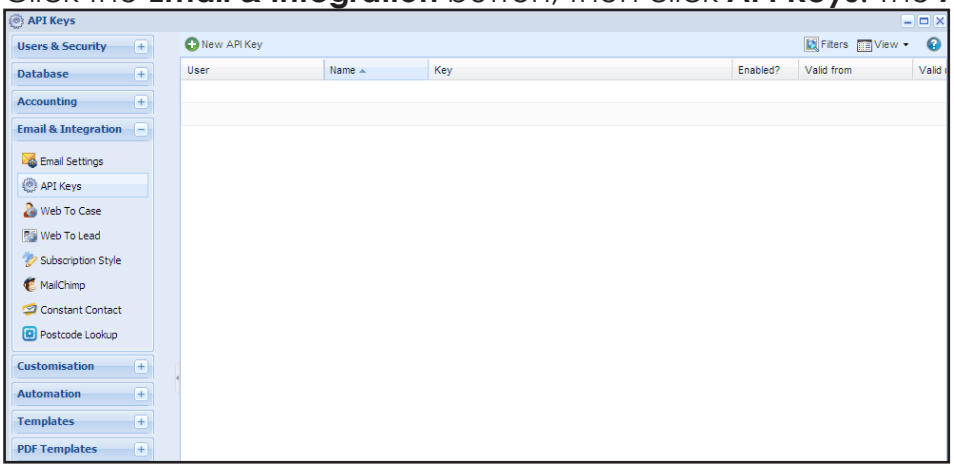
The API key allows Workbooks to access MIE Trak Pro.

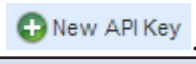
a. Make sure Workbooks is open.

b. Click the **Start** button 

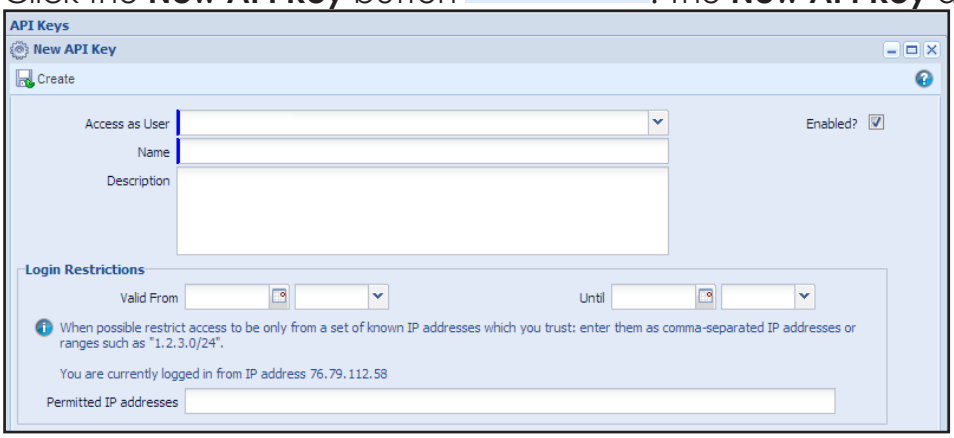
, then select **Configuration**. The **Configuration** window displays.

c. Click the **Email & Integration** button, then click **API Keys**. The **API Keys** screen displays.



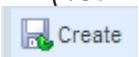
d. Click the **New API Key** button 

. The **New API Key** dialog box opens.



e. The new API must be assigned to a user. To do this, click the **Access as User** drop-down arrow, then select the individual who you would like to assign the API to.

f. Create a name for the API (i.e. MIE Trak Pro integration) in the **Name** field.

g. Click the **Create** button 

. The API key displays in the **API Key** field.

h. In the **API Key** field, use your mouse to select the API key, then copy and paste the API key into a blank document. You will need this API key when setting up the integration server.

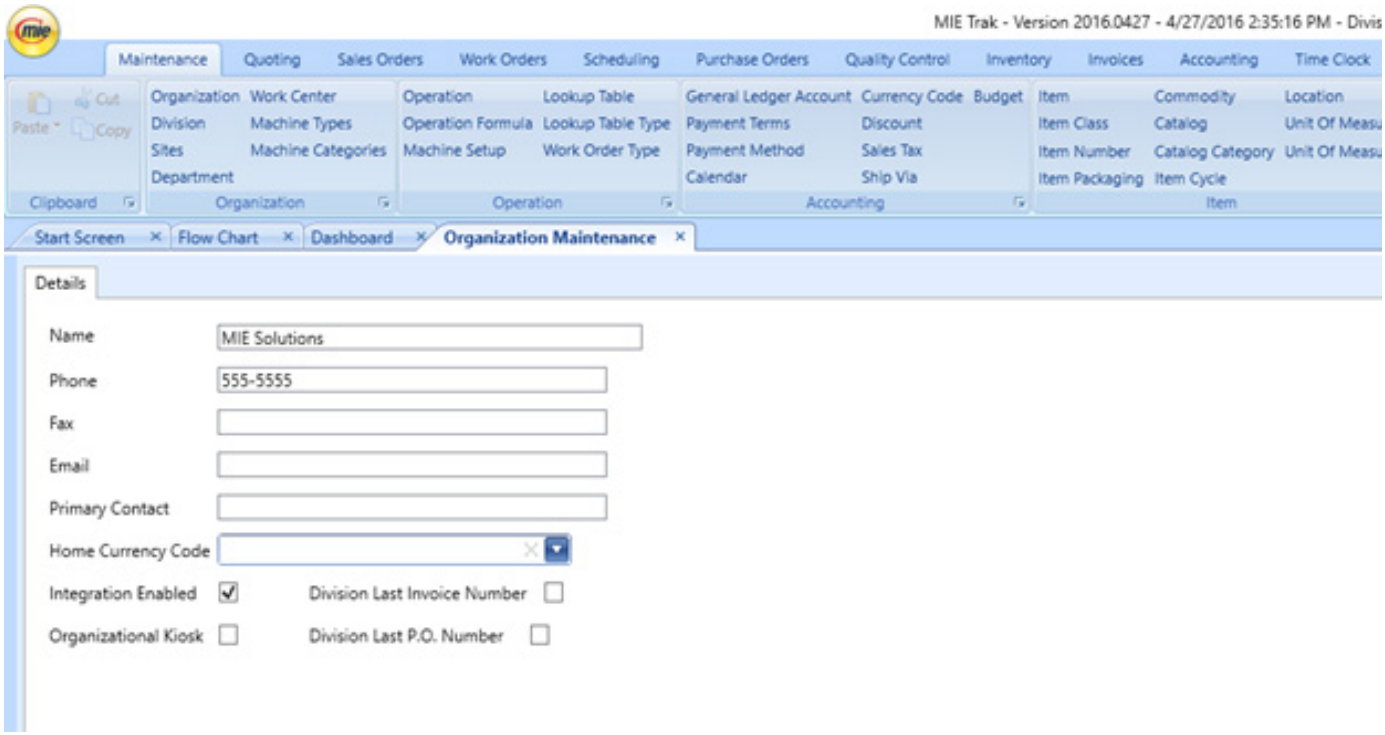
i. Click the **Save & Close** button. The **API Keys** screen displays.

MIE Trak Pro / Workbooks Integration

2. Enable the integration server in MIE Trak Pro.

The integration server records all of the changes that occur in Workbooks in order to synchronize with MIE Trak Pro.

a. Open MIE Trak Pro if it is not already open.
b. In the **Maintenance** section, click **Organization.** The **Organization Maintenance** screen displays.

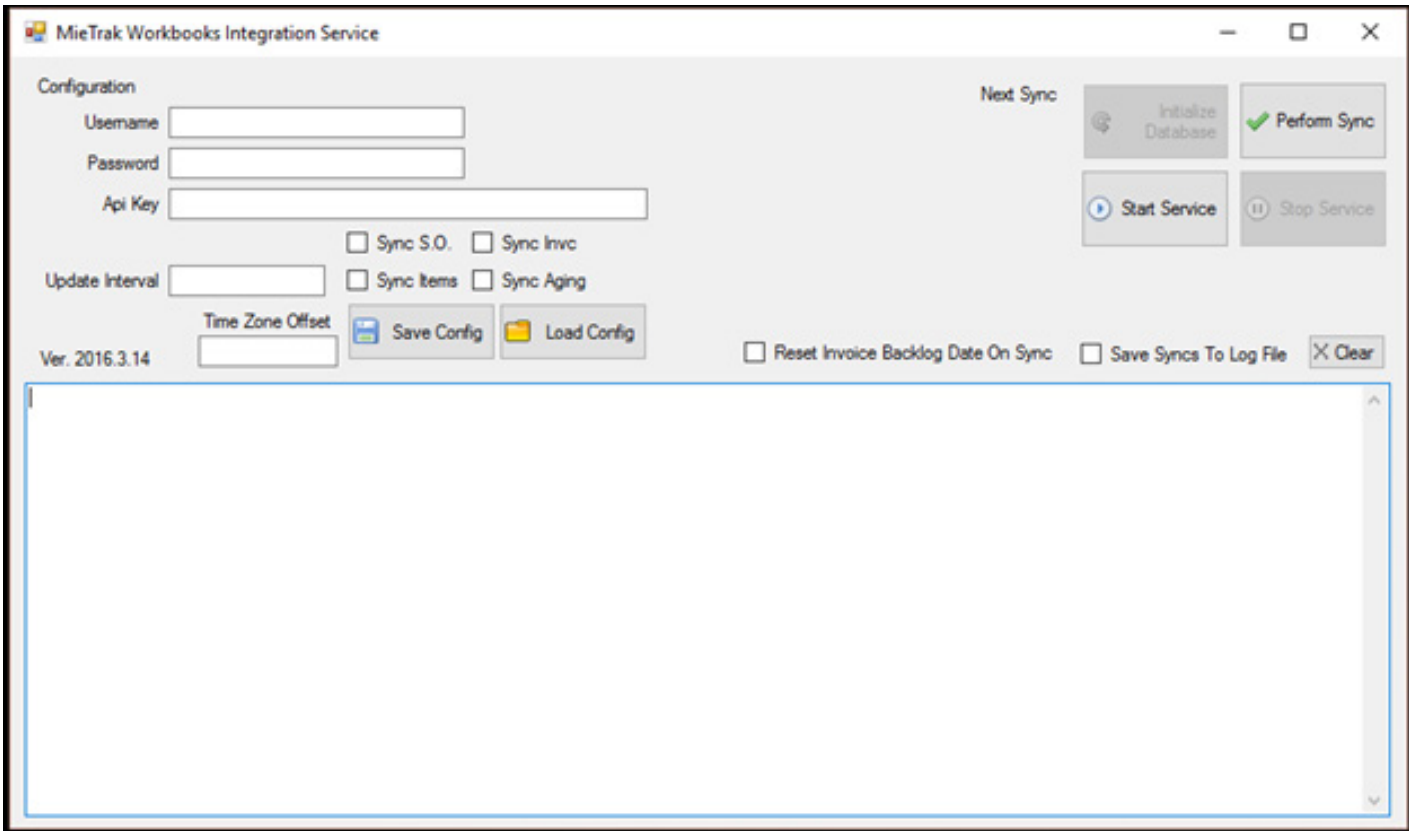


MIE Trak Pro / Workbooks Integration

3. Set up the integration server.

The integration server must be set up on a server, not on a workstation.

a. Double-click the **Mie.WorkbooksIntegrationUI.exe file** that you received from MIE Solutions. The MIE Trak Workbooks Integration Service window opens.
b. In the **Username** and **Password** fields, type the user[1]name, and password of a user who is set up in both MIE Trak Pro and Workbooks.
c. In the **Api Key field**, insert the API key that was created in Workbooks previously.
d. Use the **Update Interval field** to specify how often you want Workbooks to sync with MIE Trak Pro. (The number must be entered in MINUTES i.e. 10 is ten minutes.)
e. When you are finished, click **Save Configuration**.
f. You are now ready to initialize the database and export data from MIE Trak Pro to Workbooks. Click **Initial Database**, then Perform Sync. Depending on the amount of data you have in MIE Trak Pro, this process may take several hours.
g. After the process is complete, click **Start Service.** The service must always be running in the background in order for synchronization to occur.



mie solutions™

Integrated Data.
Informed Decisions.

Why Workbooks?

Workbooks.com PARTNER

TMC Cloud Computing EXCELLENCE AWARD 2014

NETWORK computing AWARDS 2014 ★ WINNER ★ CRM PRODUCT OF THE YEAR

WINTER 2014 HIGH PERFORMER G2 CROWD