

A photograph showing four hands, each wearing a white shirt cuff and a dark suit sleeve, holding four interlocking puzzle pieces. The pieces are colored green, yellow, blue, and orange. The background is a blurred blue sky with white clouds. A green semi-transparent box is overlaid on the bottom half of the image, containing the title text.

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

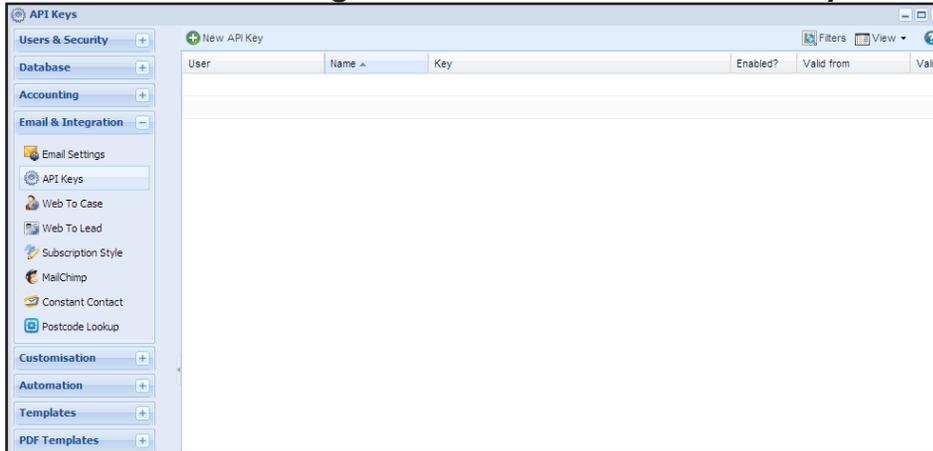
Organizations and People go Both Ways

MIE Trak Pro / Workbooks Integration

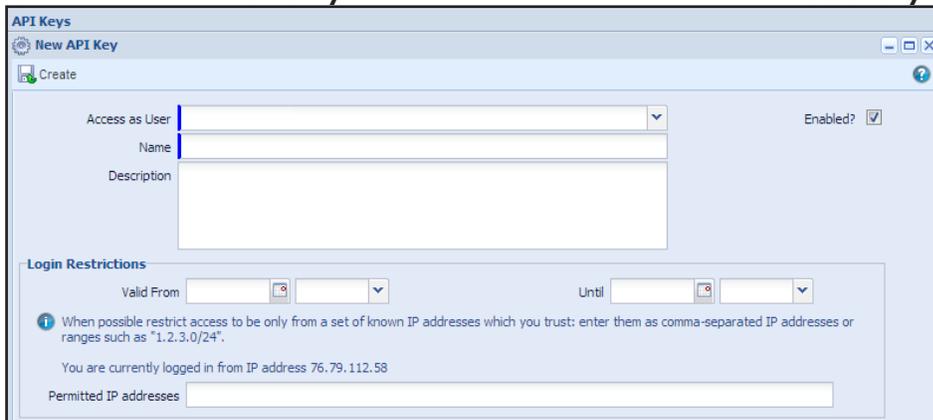
1. Create an API in Workbooks.

The API key allows Workbooks to access MIE Trak Pro.

- Make sure Workbooks is open.
- Click the **Start** button  , then select **Configuration**. The **Configuration** window displays.
- Click the **Email & Integration** button, then click **API Keys**. The **API Keys** screen displays.



- Click the **New API Key** button  . The **New API Key** dialog box opens.



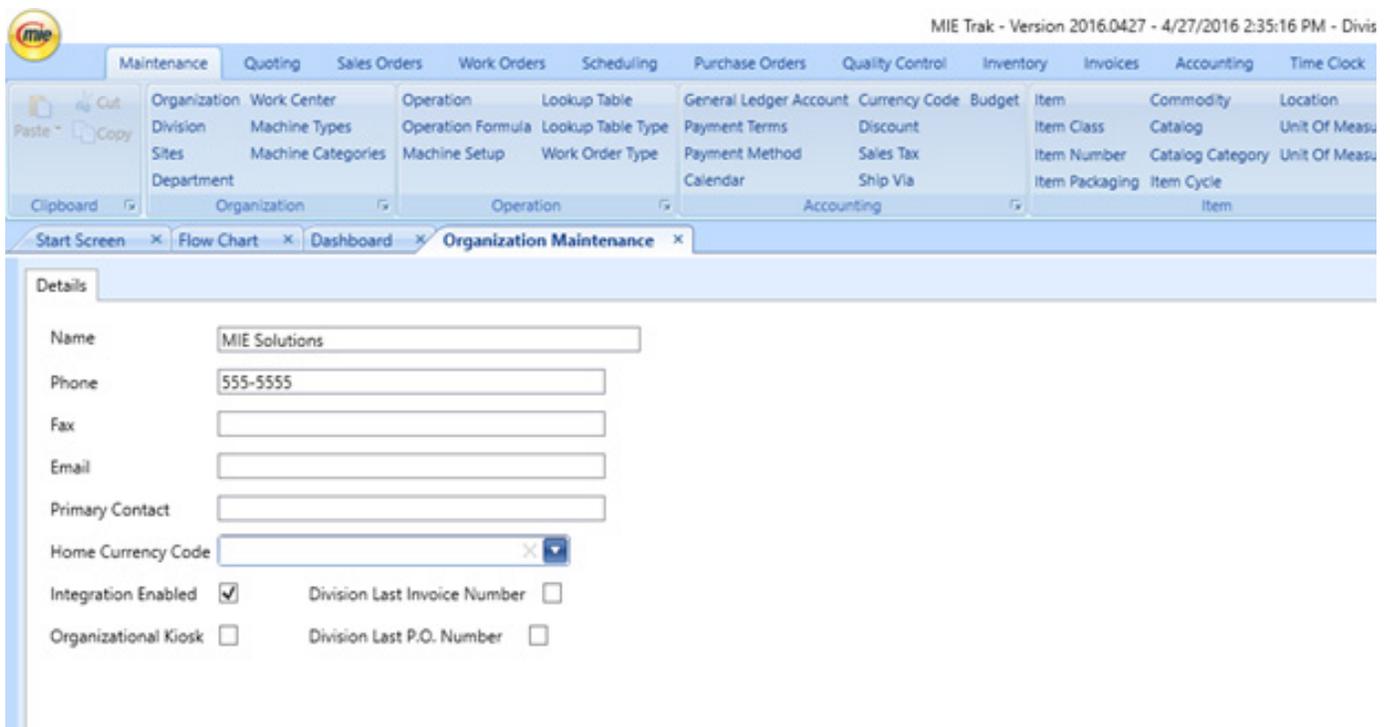
- The new API must be assigned to a user. To do this, click the **Access as User** drop-down arrow, then select the individual who you would like to assign the API to.
- Create a name for the API (i.e. MIE Trak Pro integration) in the **Name** field.
- Click the **Create** button  . The API key displays in the **API Key** field.
- 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.
- 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.

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



The screenshot shows the MIE Trak Pro software interface. The title bar indicates the version is 2016.0427 and the date/time is 4/27/2016 2:35:16 PM. The menu bar includes Maintenance, Quoting, Sales Orders, Work Orders, Scheduling, Purchase Orders, Quality Control, Inventory, Invoices, Accounting, and Time Clock. The Organization Maintenance screen is active, displaying a details form for an organization named "MIE Solutions". The form includes fields for Name, Phone, Fax, Email, Primary Contact, and Home Currency Code. There are also checkboxes for Integration Enabled, Organizational Kiosk, Division Last Invoice Number, and Division Last P.O. Number.

Organization	Work Center	Operation	Lookup Table	General Ledger Account	Currency Code	Budget	Item	Commodity	Location
Division	Machine Types	Operation Formula	Lookup Table Type	Payment Terms	Discount		Item Class	Catalog	Unit Of Measure
Sites	Machine Categories	Machine Setup	Work Order Type	Payment Method	Sales Tax		Item Number	Catalog Category	Unit Of Measure
Department				Calendar	Ship Via		Item Packaging	Item Cycle	Item

Organization Maintenance Details

Name: MIE Solutions

Phone: 555-5555

Fax:

Email:

Primary Contact:

Home Currency Code:

Integration Enabled: Division Last Invoice Number:

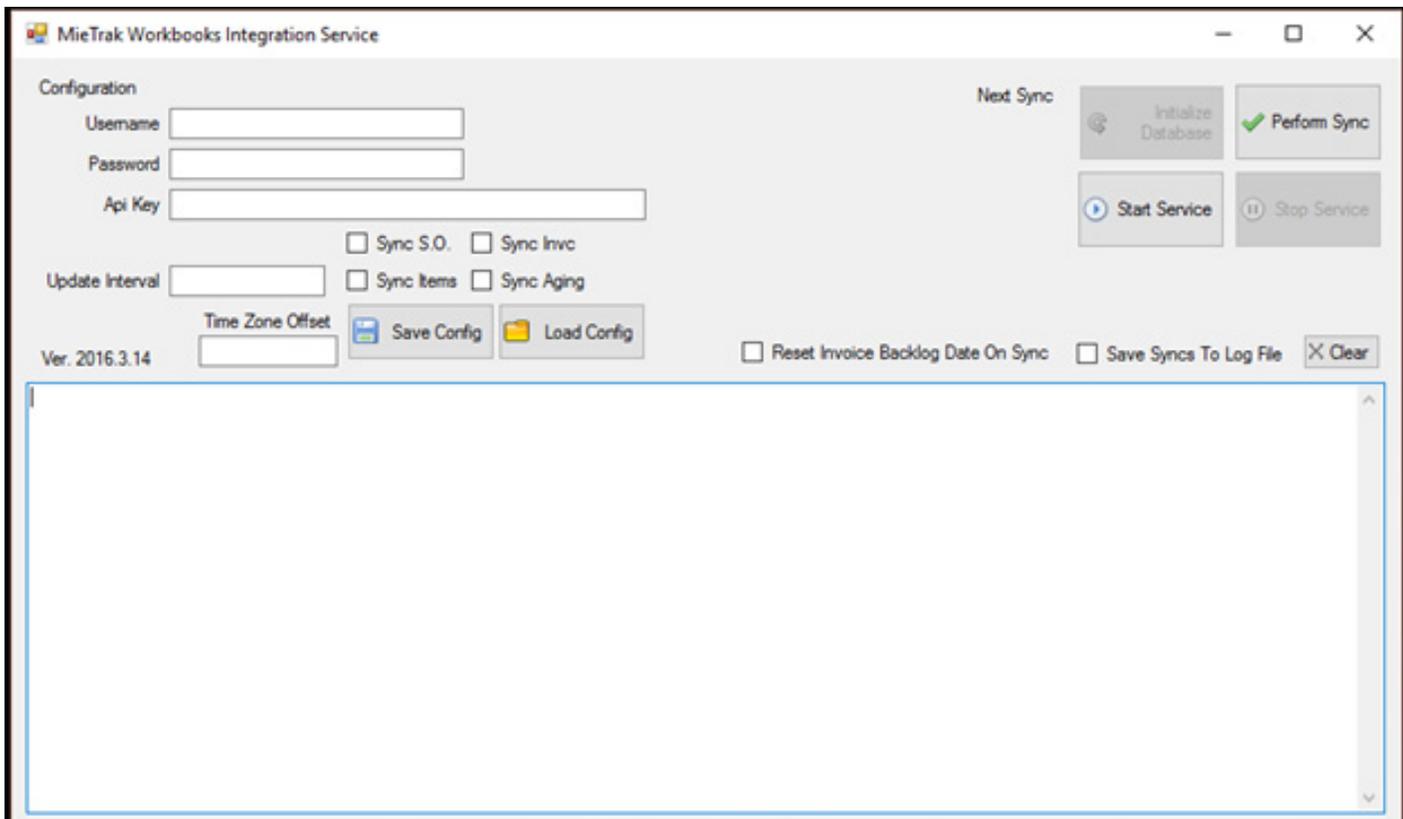
Organizational Kiosk: Division Last P.O. Number:

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.

- Double-click the **Mie.WorkbooksIntegrationUI.exe** file that you received from MIE Solutions. The MIE Trak Workbooks Integration Service window opens.
- In the **Username** and **Password** fields, type the user¹name, and password of a user who is set up in both MIE Trak Pro and Workbooks.
- In the **Api Key** field, insert the API key that was created in Workbooks previously.
- 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.)
- When you are finished, click **Save Configuration**.
- 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.
- After the process is complete, click **Start Service**. The service must always be running in the background in order for synchronization to occur.



The screenshot shows the 'MieTrak Workbooks Integration Service' configuration window. It features a 'Configuration' section with input fields for 'Username', 'Password', and 'Api Key'. Below these are checkboxes for 'Sync S.O.', 'Sync Invc', 'Sync Items', and 'Sync Aging', along with an 'Update Interval' field and a 'Time Zone Offset' field. A 'Next Sync' section contains buttons for 'Initialize Database', 'Perform Sync', 'Start Service', and 'Stop Service'. At the bottom, there are 'Save Config' and 'Load Config' buttons, and checkboxes for 'Reset Invoice Backlog Date On Sync' and 'Save Syncs To Log File'. A 'Clear' button is also present. The version number 'Ver. 2016.3.14' is displayed in the bottom left corner. A large empty text area is at the bottom of the window.



Integrated Data.
Informed Decisions.

Why Workbooks?

