MIE TRAK 2010.1

SALES ORDERS

USER GUIDE

Revised 11/13/09

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Logging Into MIE Trak

Running the MIE Trak application is very simple.

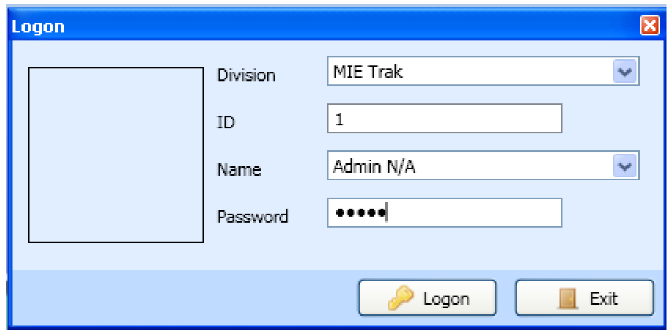
Click on the MIE Trak icon on the desktop or from the start menu to start the application.

The logon screen appears where the user picks the division they want to log on to and then enters their ID and password.

The default user name is:
Admin N/A

The default password is:
Admin

(Password is not case sensitive.)



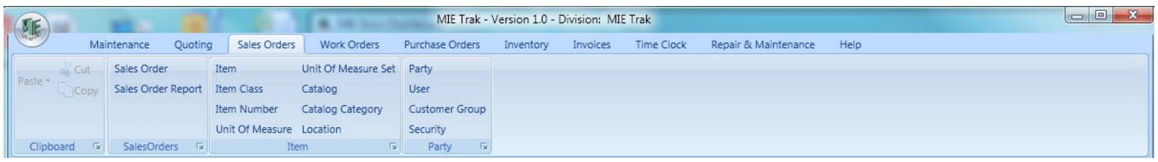
Once logged in, additional users can be added and passwords can be changed. This is done in User Maintenance.

MIE Trak Ribbon Bar

Description

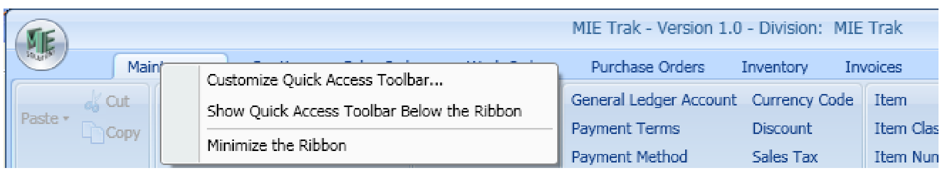
The MIE Trak ribbon bar is where the Sales Orders module is accessed.

The Sales Orders tab is where the daily modules for entering sales orders and running sales order reports are accessed.



Minimize the Ribbon Bar

The user has the ability to minimize the ribbon bar by right clicking on one of the tabs of the ribbon bar and clicking on the "Minimize the Ribbon" option.



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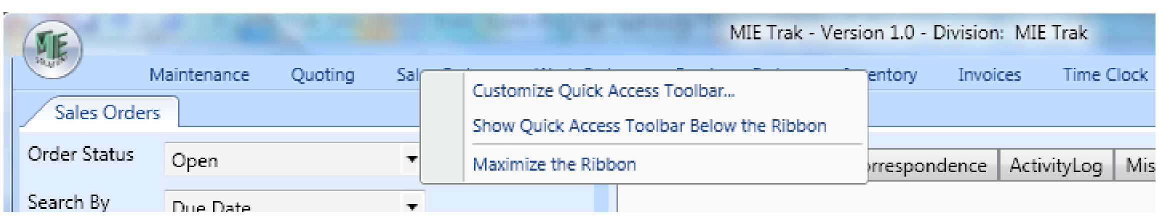
The user has the ability to maximize the ribbon bar by right clicking on one of the tabs of the ribbon bar and clicking on the "Maximize the Ribbon" option.

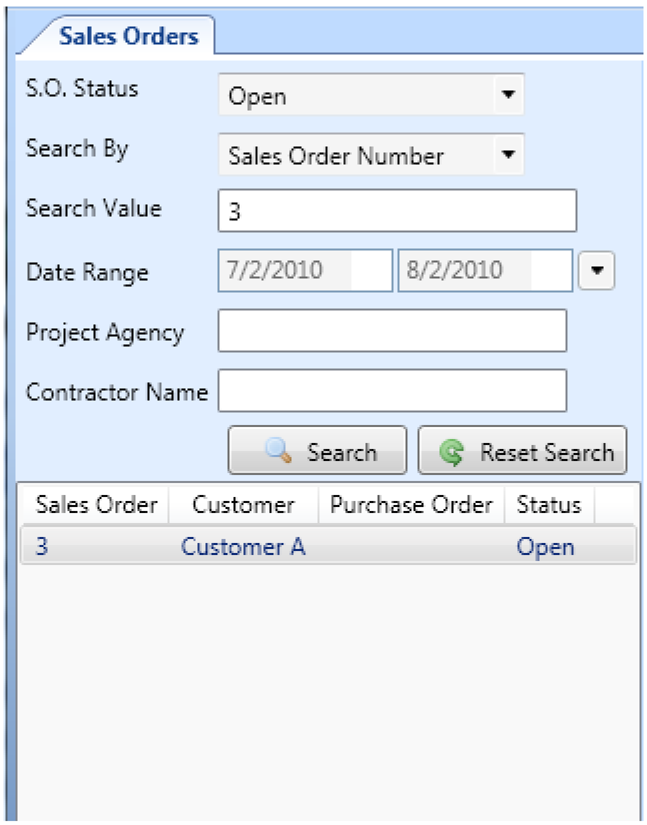


Sales Orders Module

The Sales Orders module is used to enter customer purchase orders into MIE Trak. The Sales Orders module is accessed from the Sales Orders tab on the MIE Trak ribbon bar and consists of the Search Query on the left and 9 tabs; Sales Order, Shipping, Salespersons, Correspondence, Activity Log, Miscellaneous, Quality Control, Project General and Project Detail.

SEARCH QUERY

The Sales Order Search Query gives the user the ability to query sales orders by a number of statuses and to search by a number of variables.



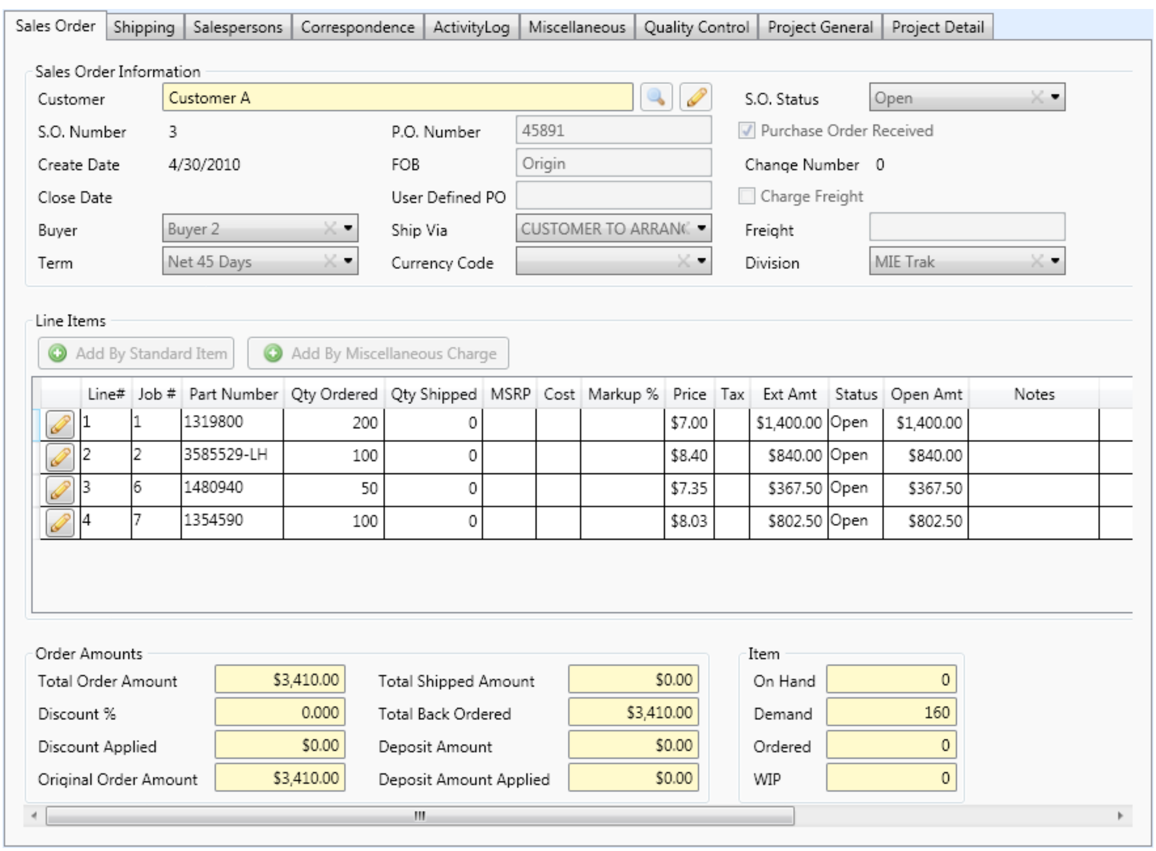
KEY FIELDS

S.O. Status	Select the status of the sales orders that the user wants to be listed. The statuses are All, Closed, Hold, Open and Production Hold.
Search By	Select the search by option the user wants to look up sales orders by. The options are Sales Order Number, Customer, Date Range, Due Date, Quote Number, Job Number, Work Order Number, Invoice Number, RMA Number, Part Number, Part Description and P.O. Number.

Search Value	Enter the value that corresponds to the search by option if there is one.
Date Range	Enter the date range that corresponds to the time period the user is looking for.
Project Agency	If the Project General tab is used this is a lookup of the Agency field on the Project General tab.
Contractor Name	If the Project General tab is used this is a lookup of the Primary Contractor Name field on the Project General tab.

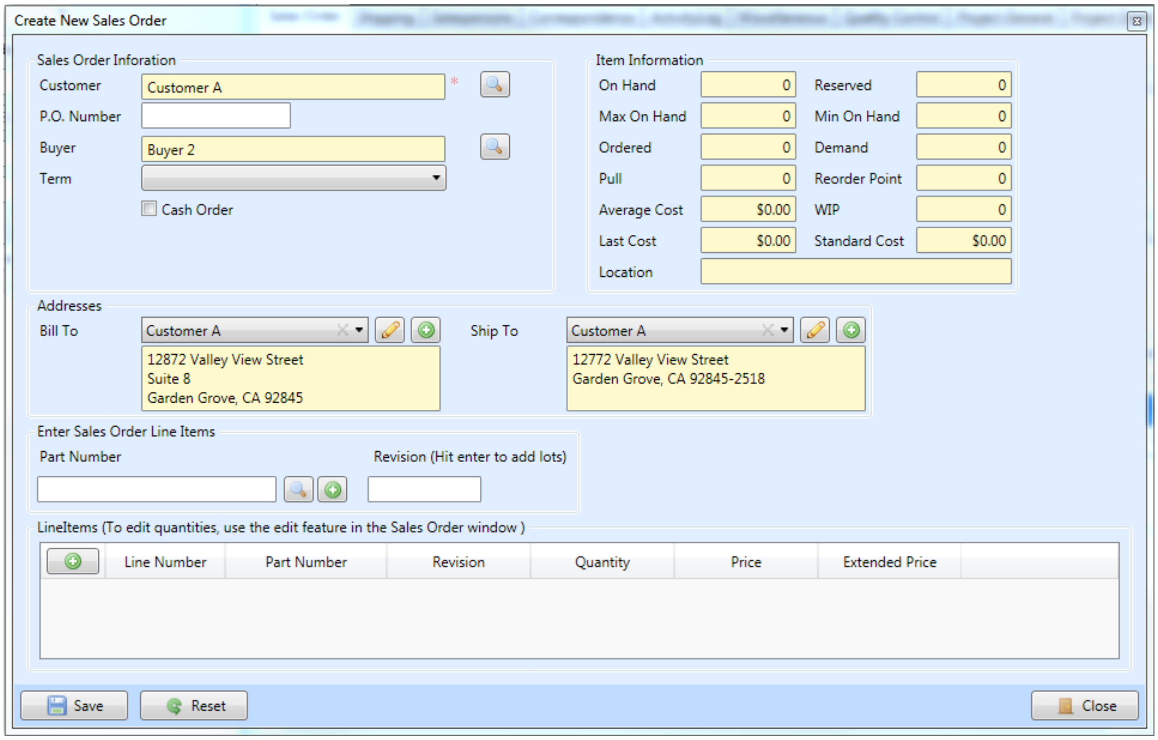
SALES ORDER TAB

The Sales Order tab gives the user the ability to enter new sales orders into MIE Trak and review or modify existing sales orders.



Entering New Sales Orders

To enter a new sales order click on the New button and the Create New Sales Order screen appears.



Required Fields

Customer

Click on the *(Search)* button to pick from the list of customers in the division list. If the customer is not listed it can be added by clicking on the *(Add)* button on the Search Party screen.

Part Number

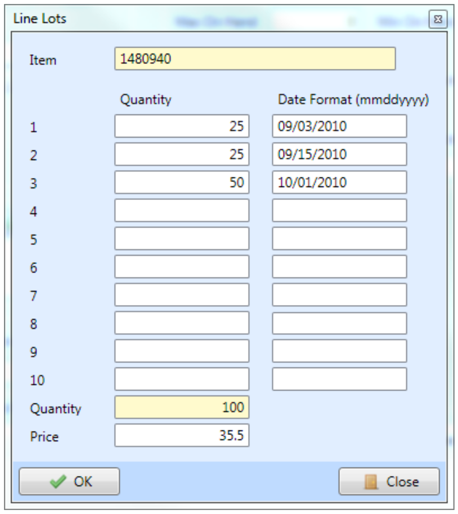
Start entering a part number and hit the <Enter> key and the Item Advance Search screen will appear listing all part numbers starting with the characters that have been entered. Select the part number desired or if not listed the part can be added to the system by clicking on the *(Add)* button and an Add Item screen will appear.

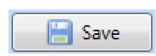
Quantity(s) & Due Dates

After entering the part number hit the <Enter> key and the Line Lots screen appears where up to 10 quantities and release dates can be entered. If the Due Date year is the same as the system year the user only needs to type in the month and day and hit the <Enter> key and the current year will be entered in the date field. Once all of the quantities have been entered the user can hit the <Enter> key while the cursor is in the next quantity field and the cursor will jump to the Price field.

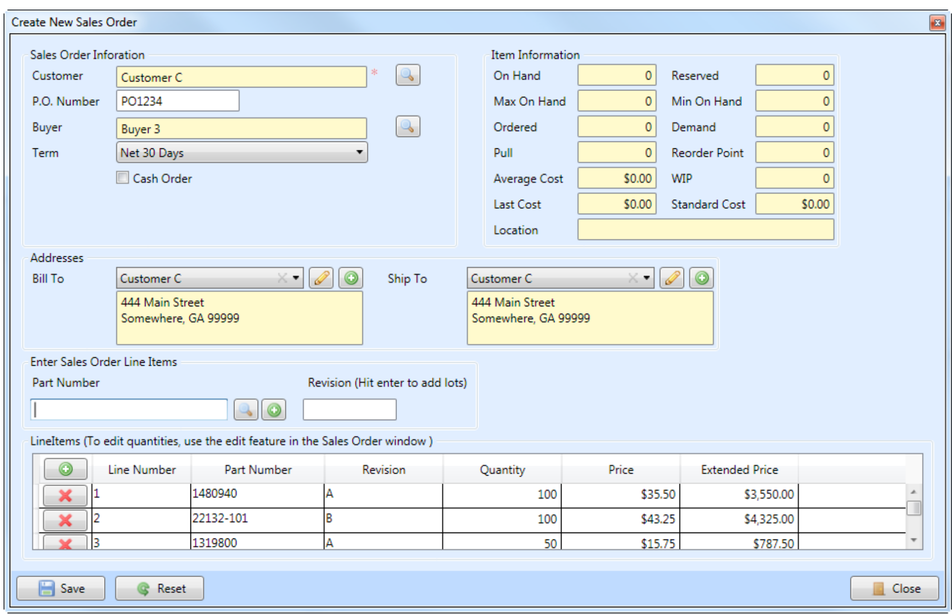
Price

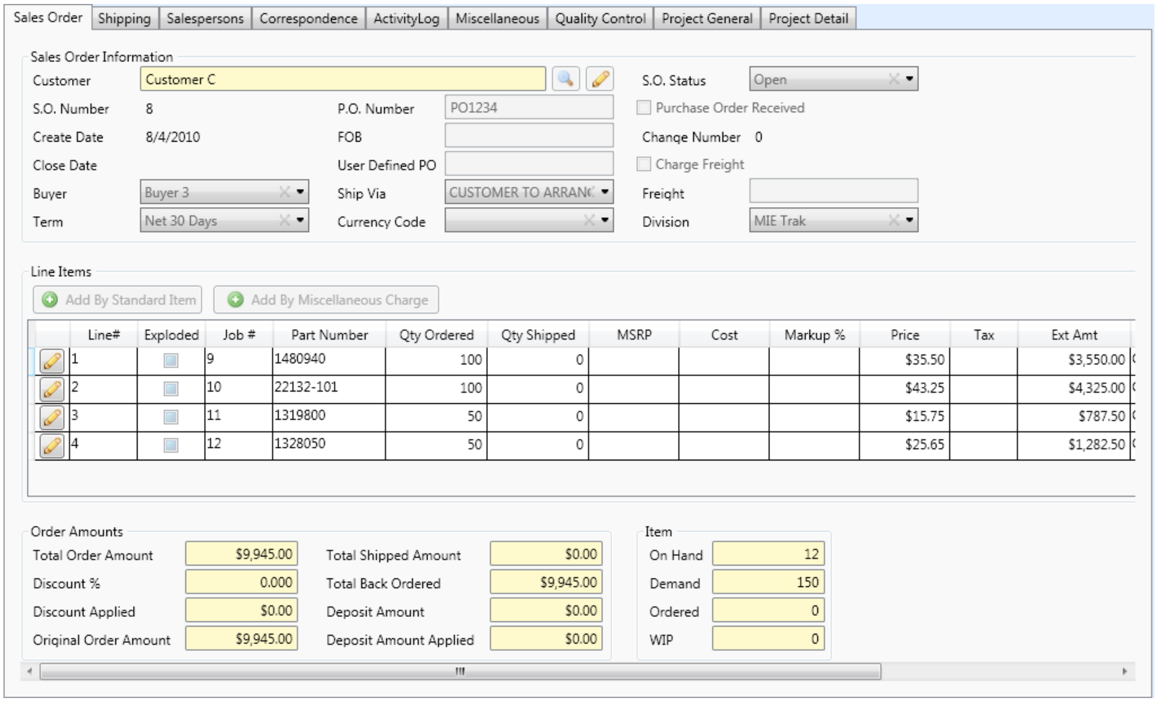
If there is a price entered in the Party Price tab in Item Maintenance for the customer the sales order is being created for that price will be brought over corresponding to the total quantity that has been entered for the part. If there is no Party Price for the customer however there is a Base Price entered then the system will bring over the Base price for the part from the Base Price tab in Item Maintenance. Otherwise enter the price that is to be charged for the part on this sales order.



After entering all of the line items of the sales order click on the 

button and the items will be saved to the sales order.

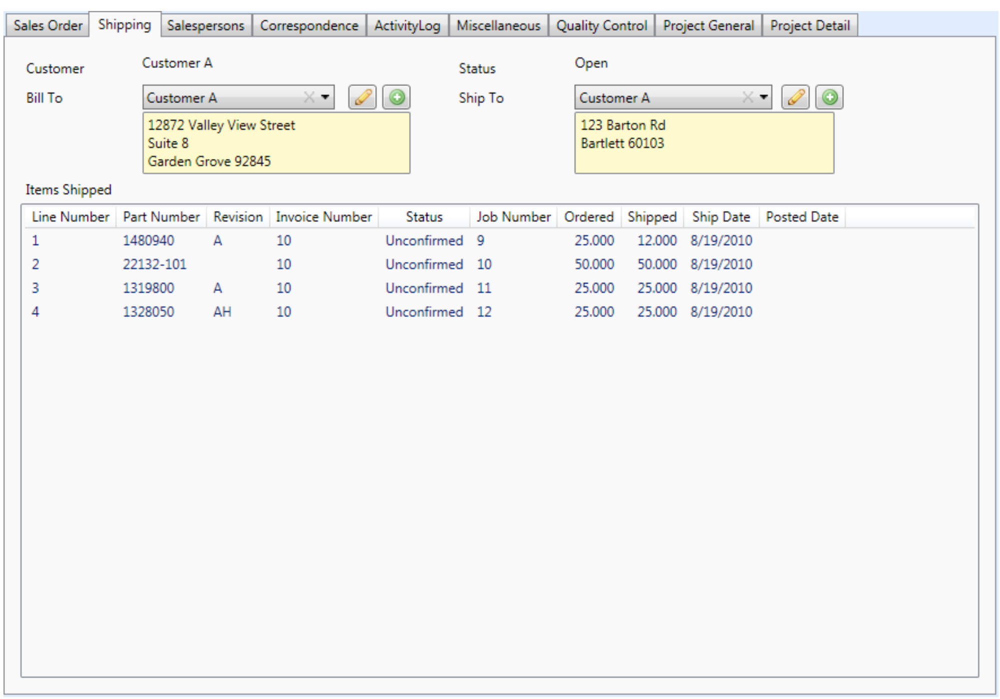




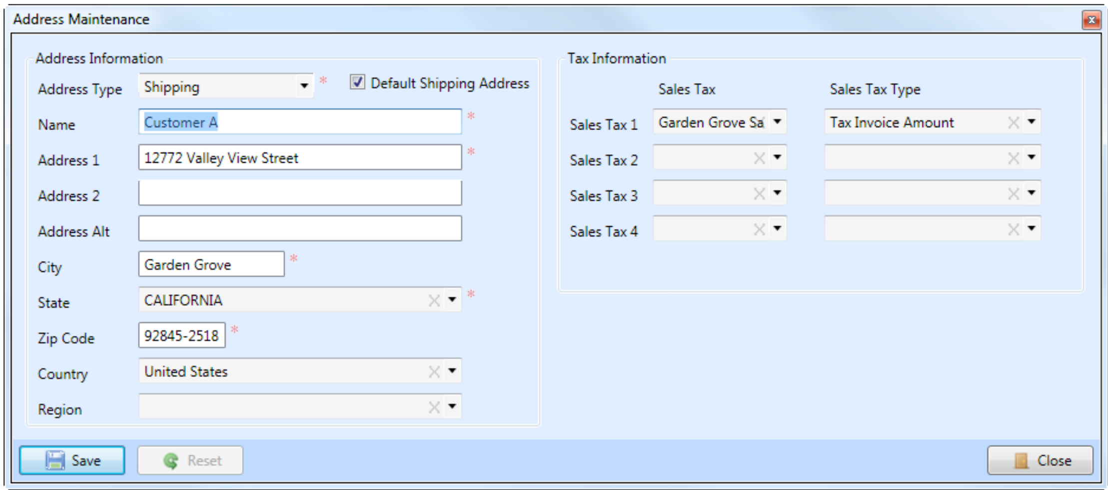
Tax *(checkbox)* Enter a check mark in the Tax checkbox if the line item should have sales tax applied to it.

SHIPPING TAB

The Shipping tab gives the user the ability to change from the default Bill To and Ship To addresses on a sales order basis and to view all of the shipments made on the sales order.



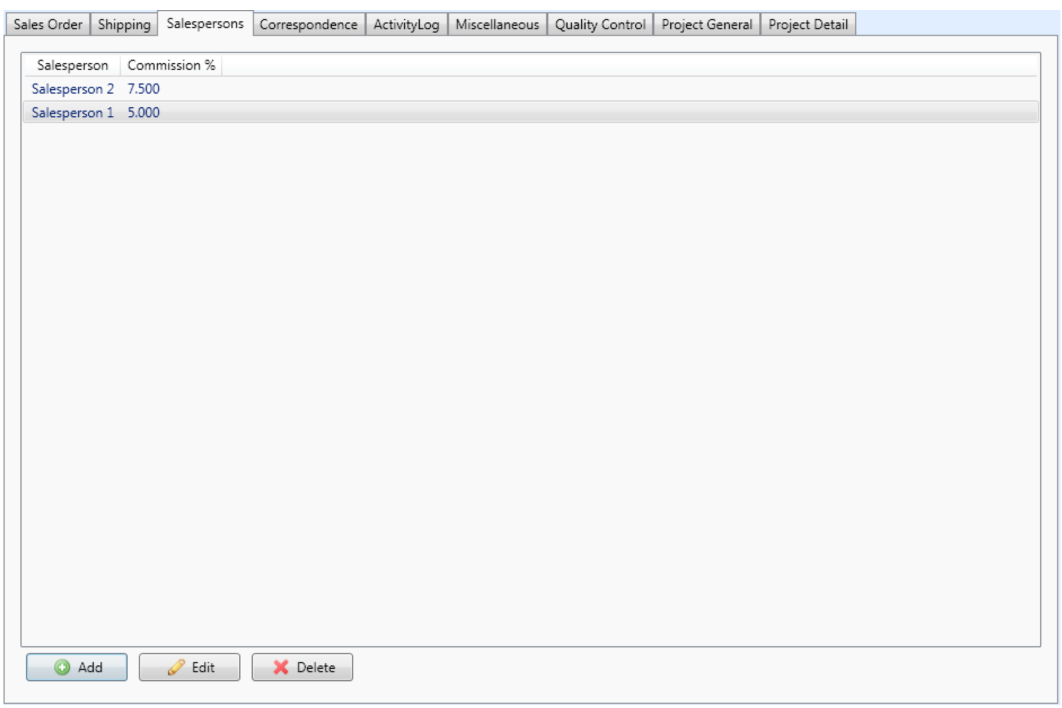
By clicking on the Edit button the user can either edit the Bill To and Ship To addresses or add new addresses. Clicking on the *(edit)* button or *(add)* button the Address Maintenance screen appears. Modify the existing data if the edit button was chosen or enter new data if the add button was chosen.



Click on the Save button when done.

SALESPERSONS TAB

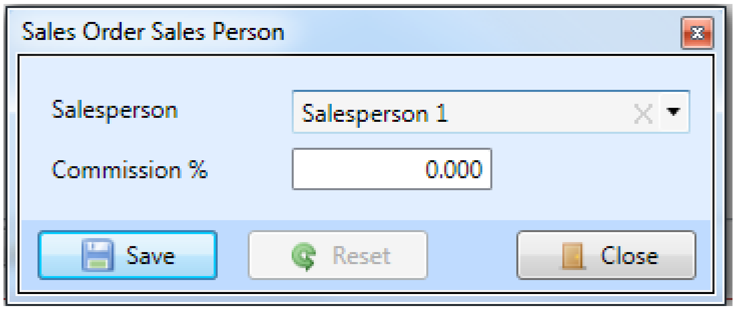
The Salespersons tab gives the user the ability to enter one or more salespersons and their commission rates to be applied against the sales order when the order is shipped. The system automatically brings over the salespersons and their commission rate from Party Maintenance when the sales order is created.



To add a salesperson click on the 

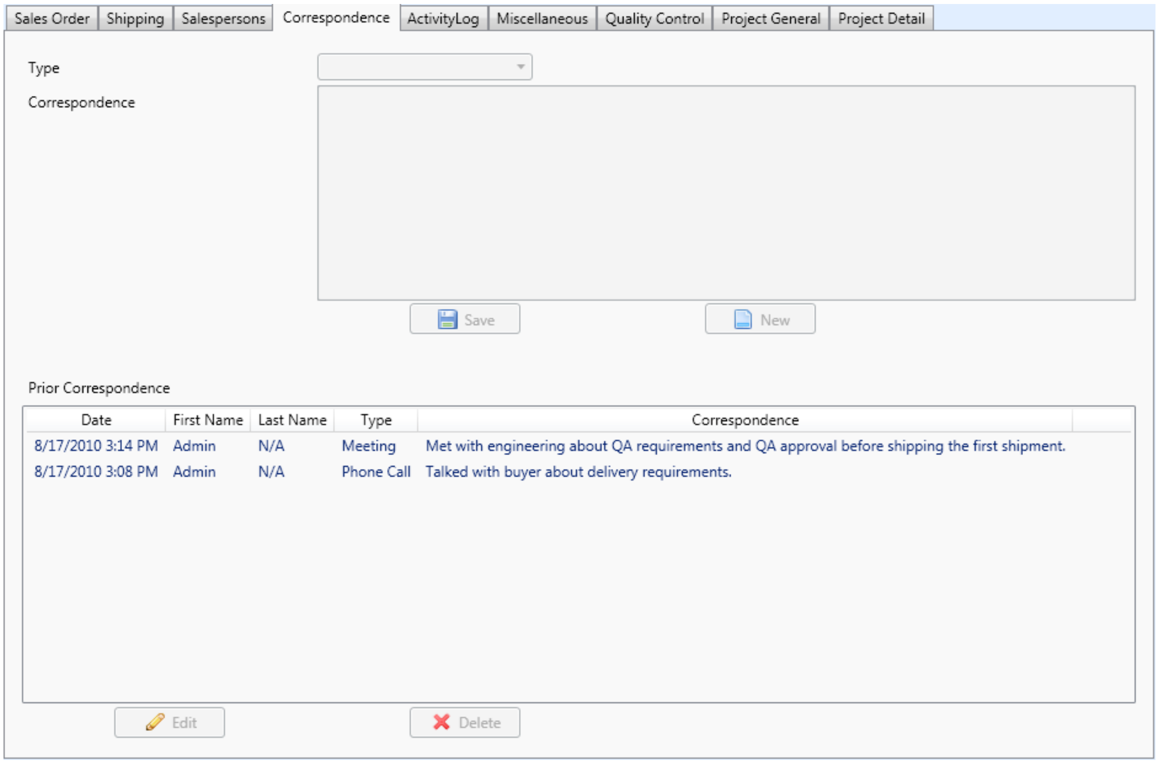
button and the Sales Order Sales Person screen appears. Select the salesperson from the list and enter their commission rate for this sales order. Or click on the 

button to edit an existing salesperson.



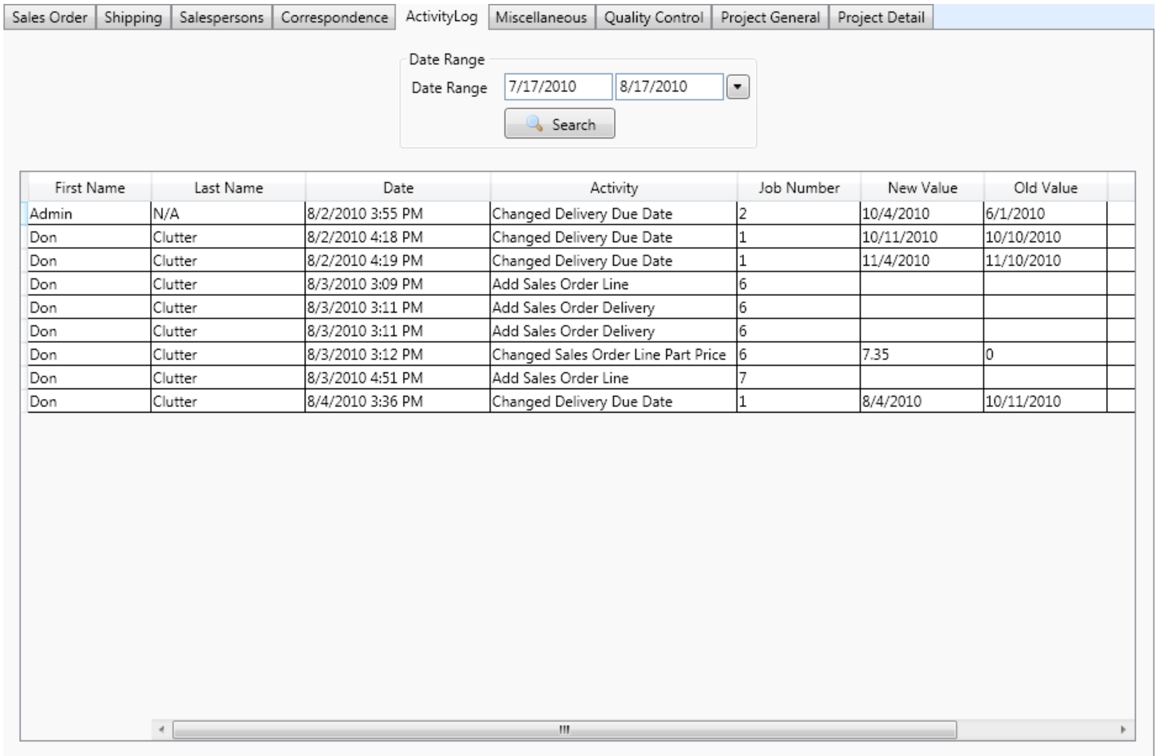
CORRESPONDENCE TAB

The Correspondence tab gives the user the ability to enter activities that occurred and are associated with the sales order.



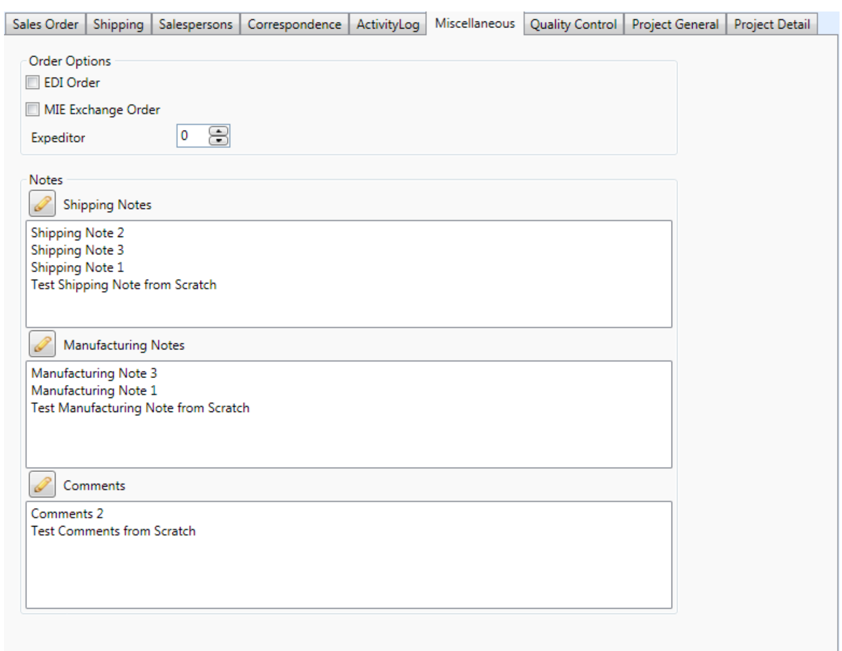
ACTIVITY LOG TAB

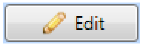
The Activity Log tab gives the user the ability to identify changes made to a sales order and the employee that made the changes.



MISCELLANEOUS TAB

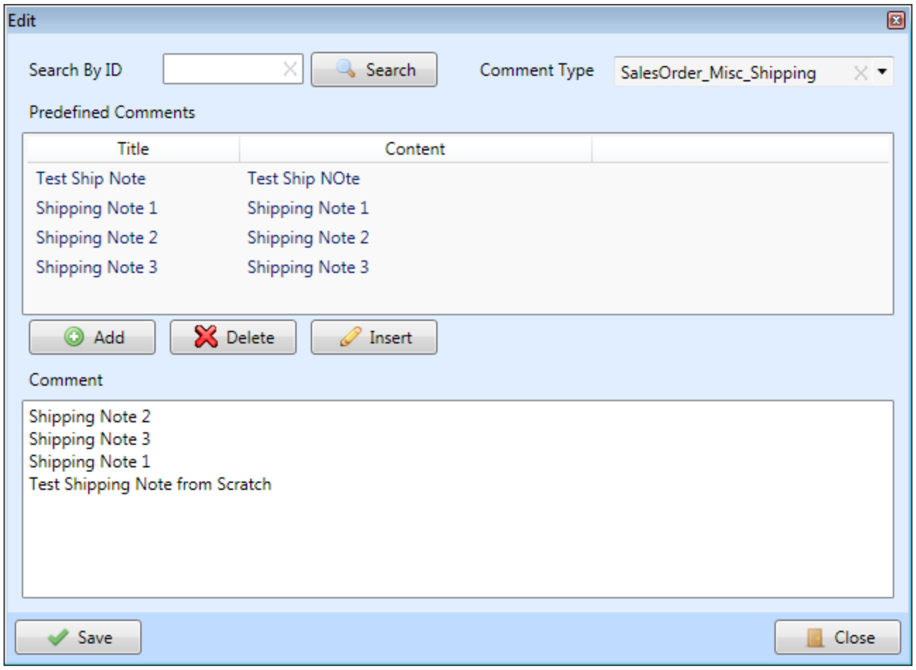
The Miscellaneous tab gives the user the ability to identify the order as an EDI Order or MIE Exchange Order as well as assign the order to an Expeditor. Also, the user can enter different types of notes and comments about the sales order. The Shipping Notes will be added to any invoice created from the sales order and are displayed on the Miscellaneous tab of the invoice.

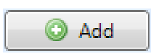


Click on the 

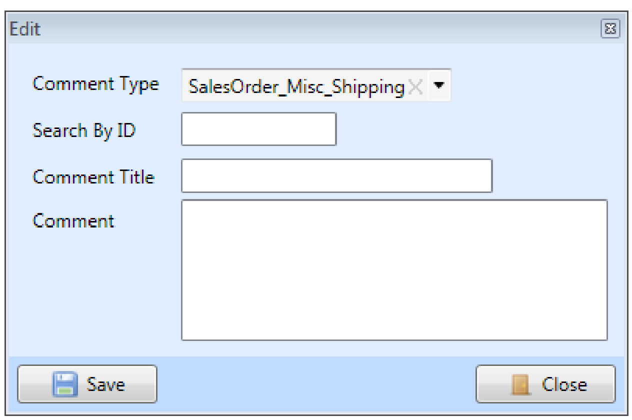
button to add notes to the sales order. Then click on the  *(edit)* button corresponding to the type of note that is to be added. The Edit screen appears where any predefined comments are listed and can be picked by double clicking on the comment in the Predefined Comments list.

Adding Predefined Comments



Click on the 

button to bring up the comment Edit screen.



Required Fields

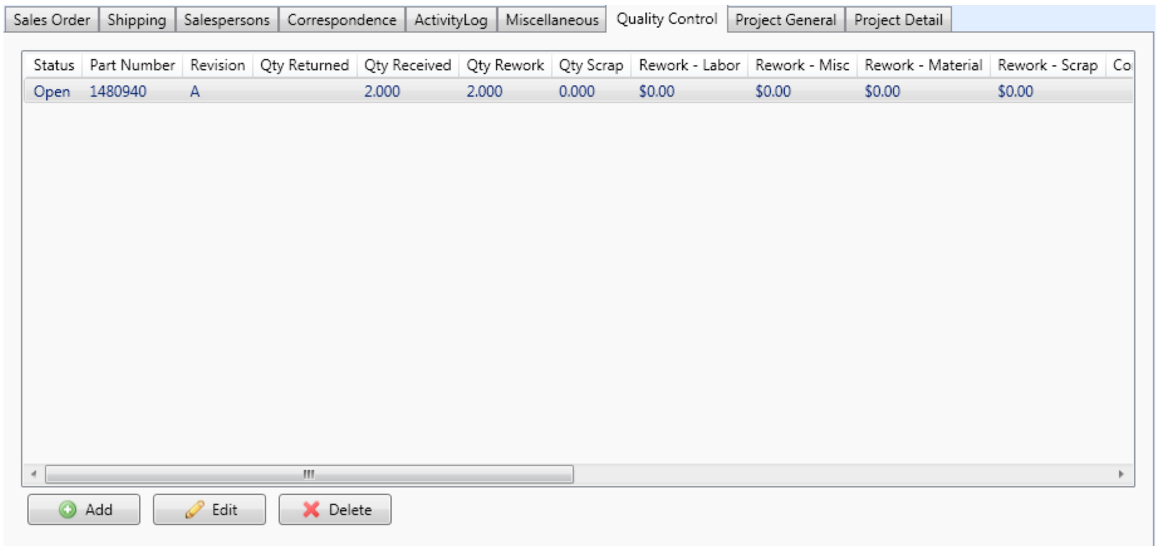
Comment Title	Enter a title identifying the comment.
Comment	Enter the comment that is to be used on any sales orders.

Optional Fields

Search By ID — Enter up to a 10 digit number that can be searched on.

Quality Control Tab

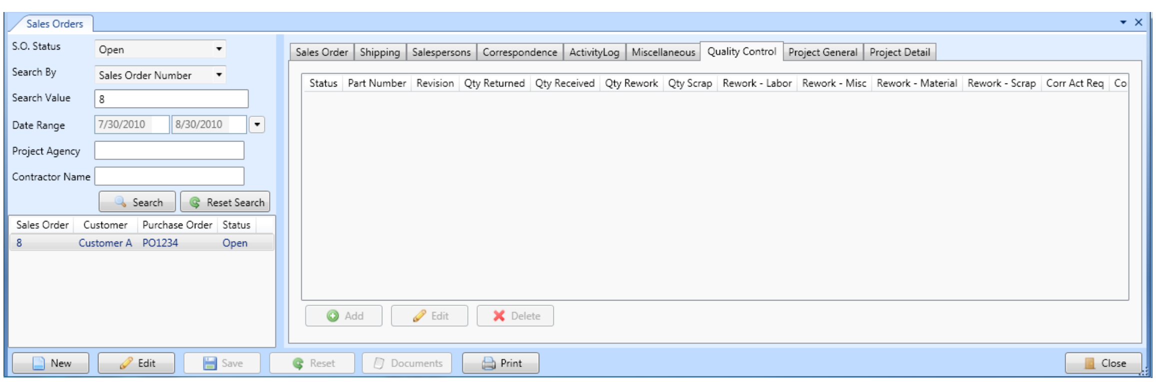
The Quality Control tab gives the user the ability to record an RMA for returned parts associated with the sales order the parts were shipped on.



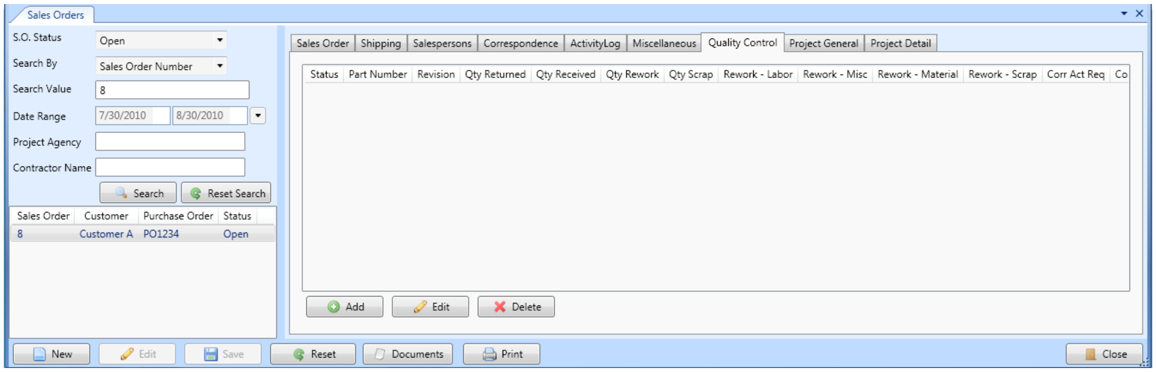
Adding an RMA to a Sales Order

To add an RMA to a sales order the user first looks up the sales order then clicks on the Quality Control tab of the sales order then clicks on the 

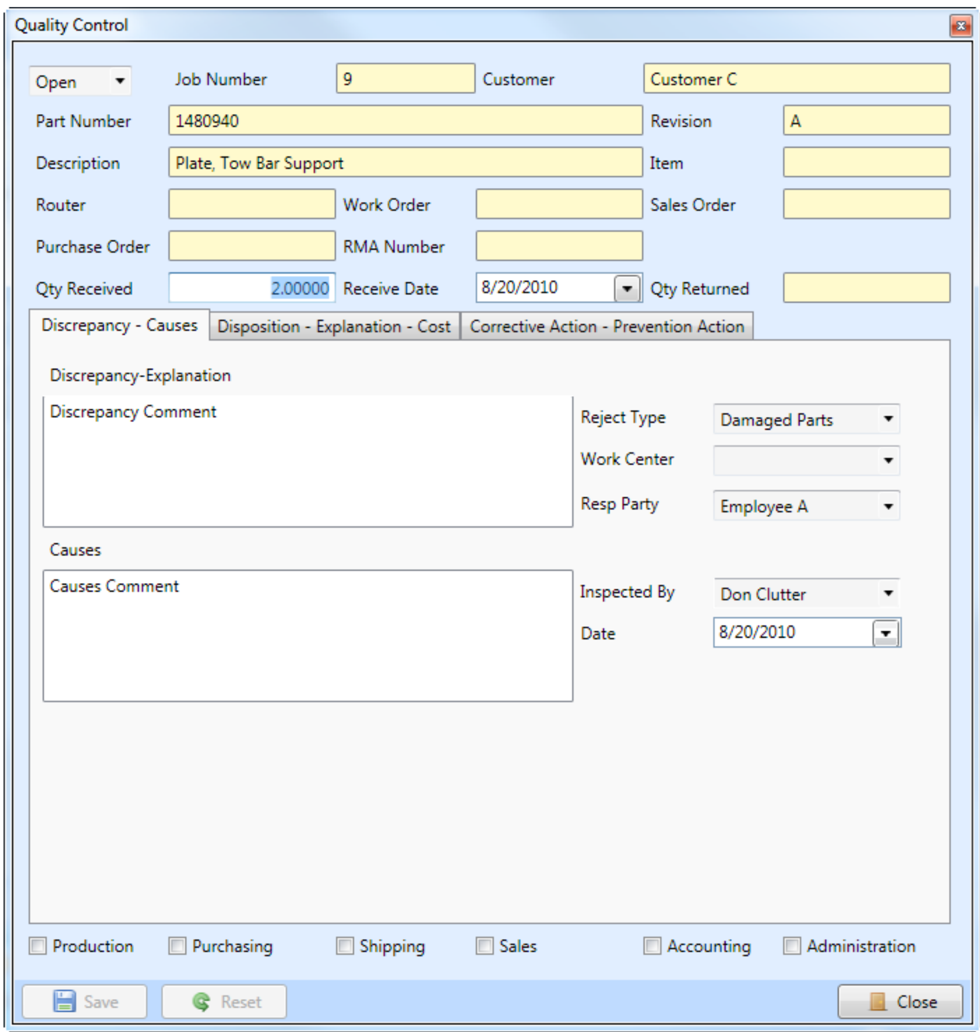
button on the Main Sales Order module tab at the bottom left of the screen.



That gives the user the ability to Add, Edit or Delete RMA records.



Click on either the Add or Edit button and the Quality Control screen appears.



REQUIRED FIELDS

Job Number	Click on the Job Number field and a list of all jobs will drop down. Highlight the job or part number of the part being returned.

Qty Received — Enter the number of parts that were actually returned from the customer.

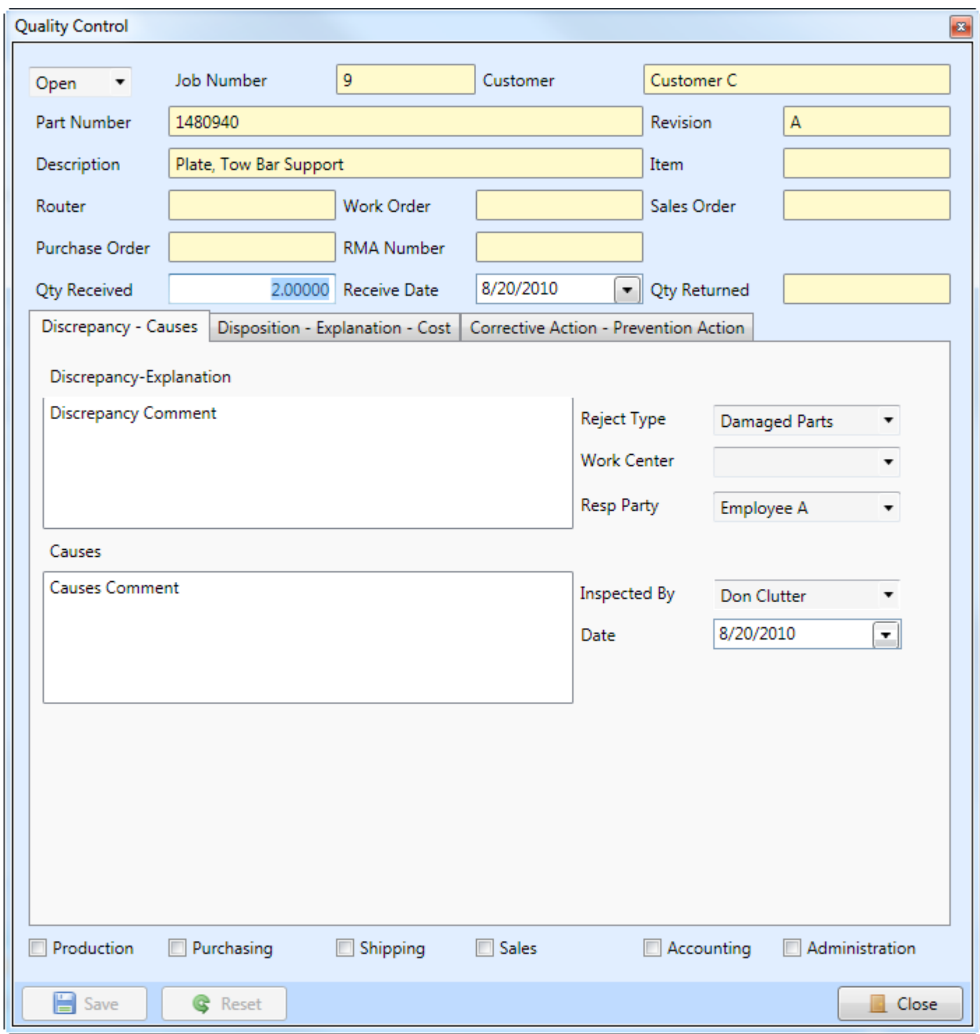
Optional Fields

Qty Authorized — Enter the number of parts that are authorized to be returned.

Receive Date — Enter the date the parts were received from the customer.

Discrepancy – Causes Tab

The Discrepancy – Causes tab is used to enter an explanation of the discrepancy and cause of the discrepancy.

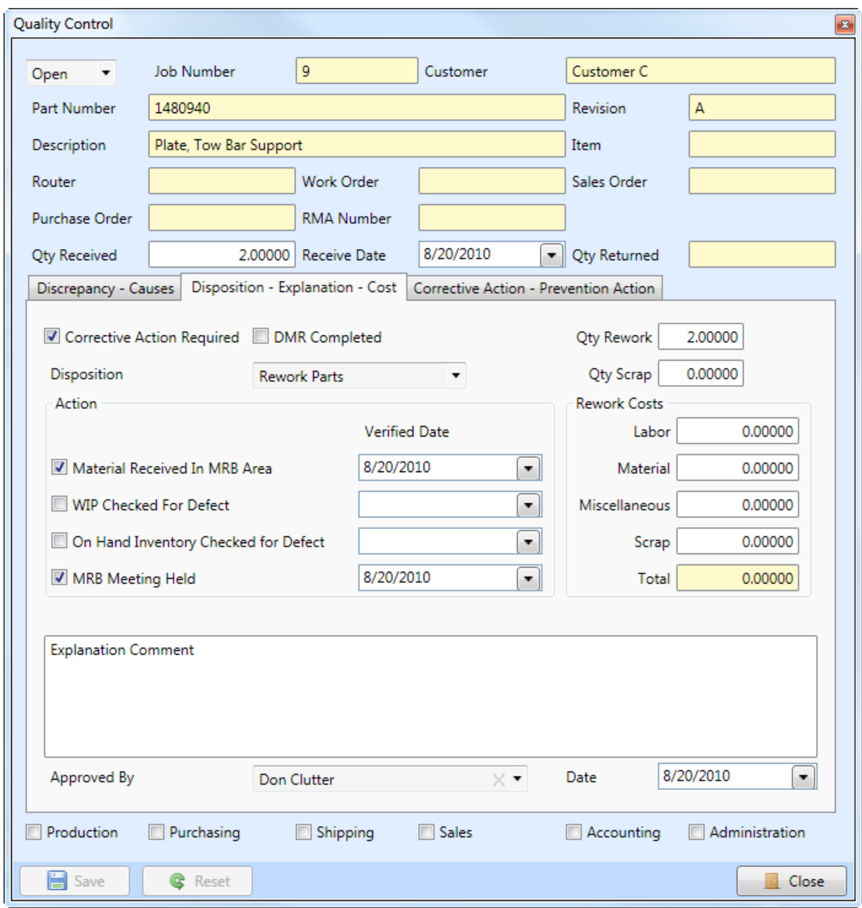


KEY FIELDS

Reject Type	Select the rejection type from the drop down menu. This gives the user the ability to generate reports based on the rejection type.
Work Center	Select the work center from the drop down menu. This gives the user the ability to generate reports based on the work center causing the rejection.
Resp Party	Select the employee responsible for the discrepancy from the drop down menu. This gives the user the ability to generate reports based on the employee responsible for the discrepancy.

DISPOSITION – EXPLANATION – COST TAB

The Disposition – Explanation – Cost tab is used to enter the disposition of the parts and to accumulate the costs incurred to rework the parts.



KEY FIELDS

Corrective Action Required (checkbox) — Enter a checkmark in the Corrective Action Required checkbox to activate the Corrective Action – Preventive Action tab in order to enter corrective action comments and preventive action comments.

Disposition — Select the disposition from the drop down menu. This gives the user the ability to generate reports based on the disposition.

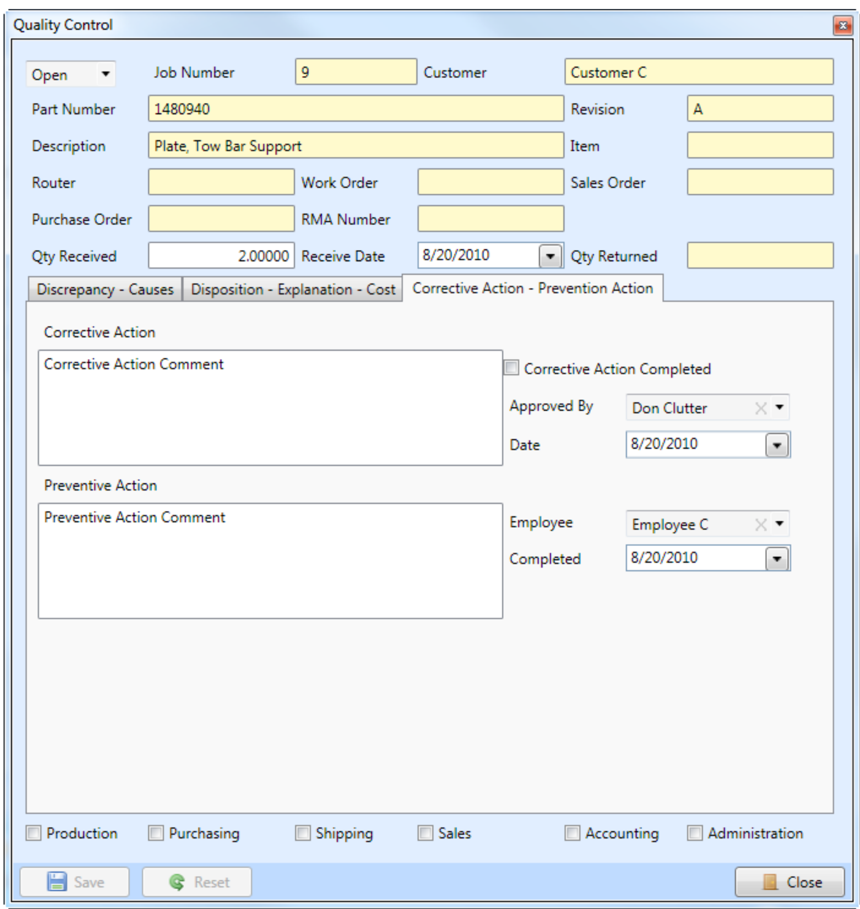
DEFINITIONS

DMR Completed (checkbox) — **DMR** is defined as **D**efective **M**aterial **R**eport

Material Received in **MRB** Area (checkbox) — **MRB** is defined as **M**aterial **R**eview **B**oard

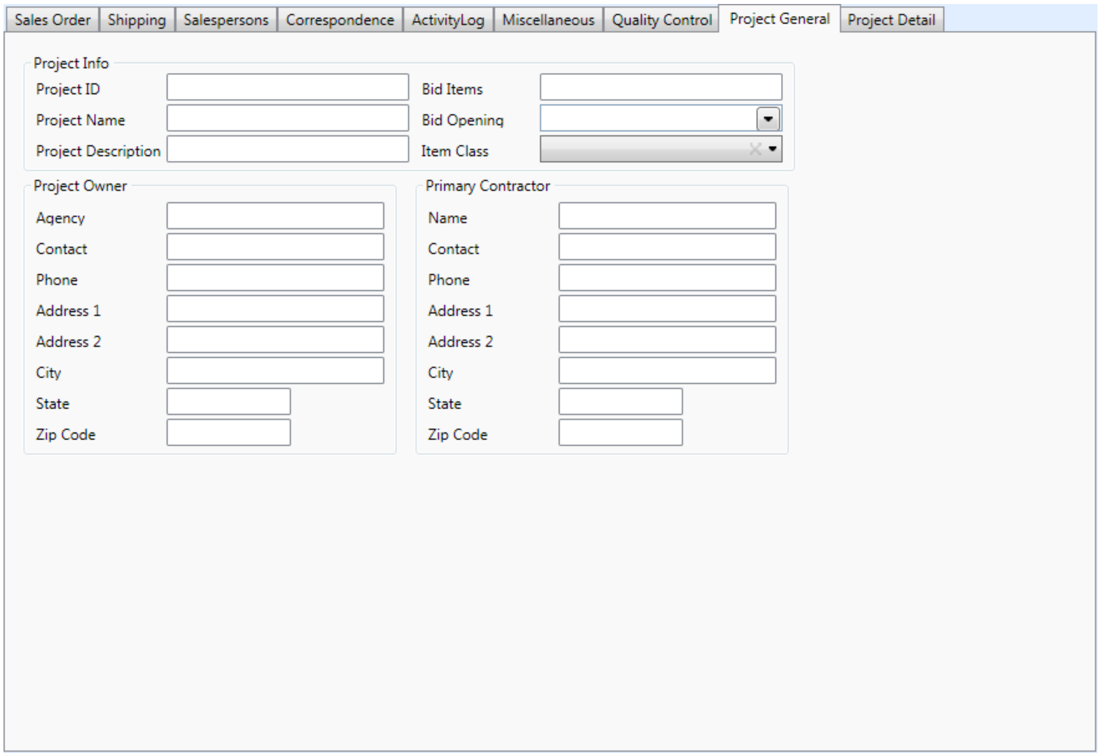
CORRECTIVE ACTION – PREVENTIVE ACTION TAB

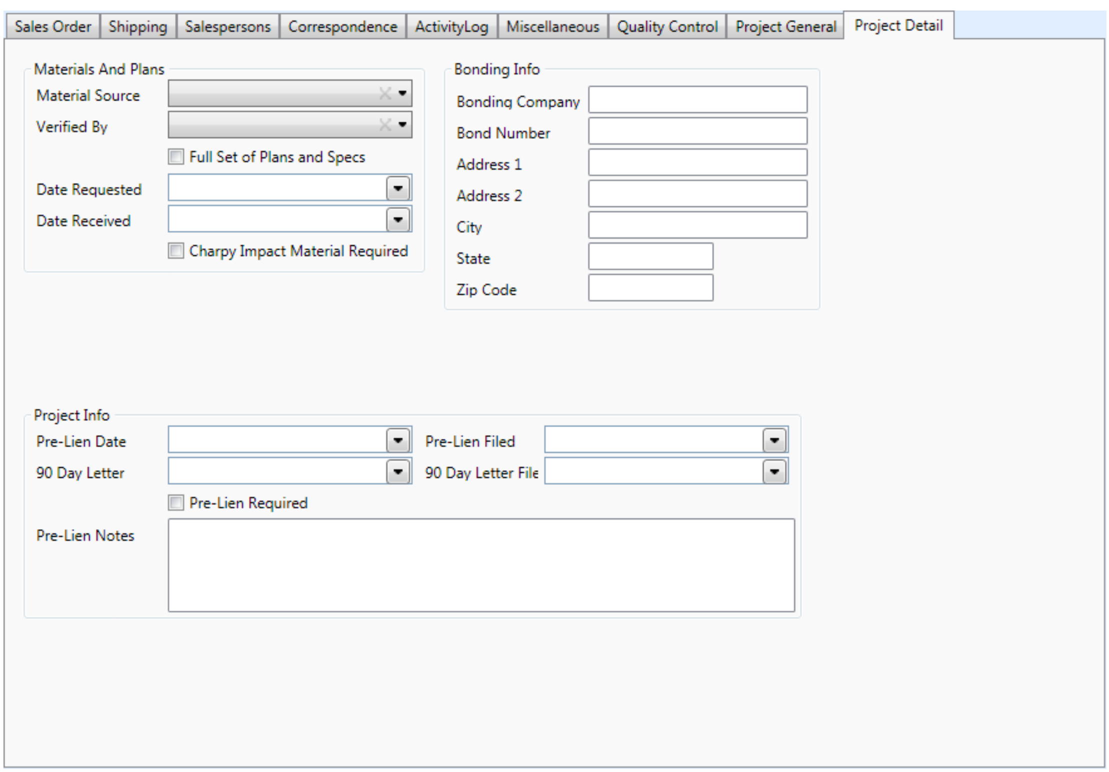
The Corrective Action – Preventive Action tab is used to enter any corrective actions taken and preventive actions implemented.



PROJECT GENERAL & PROJECT DETAIL TABS

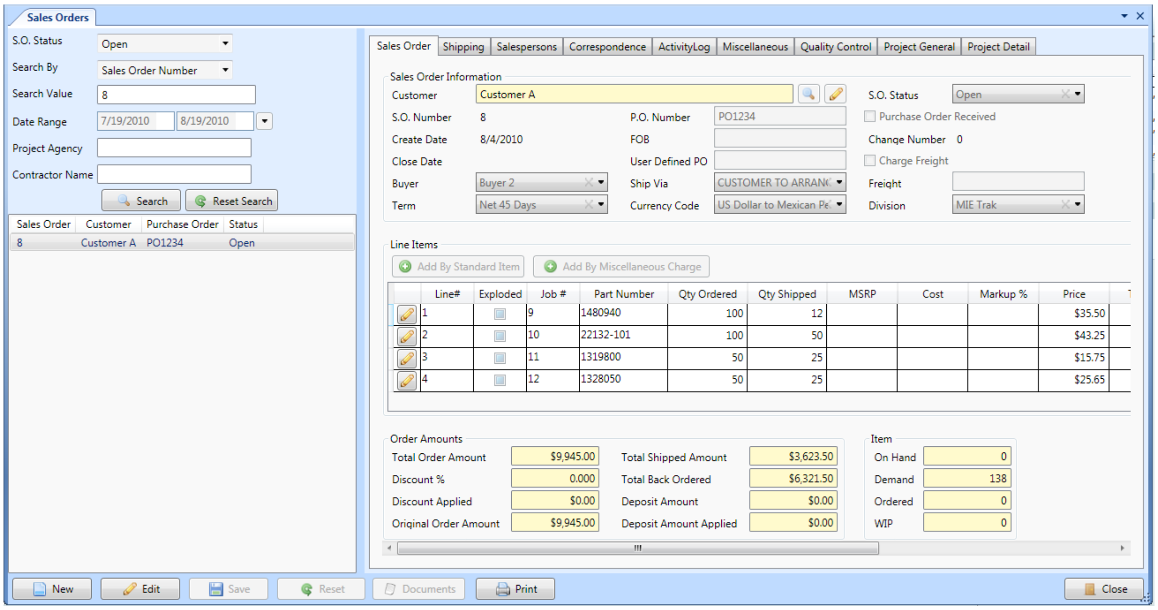
The Project tabs give the user the ability to enter information that is to be associated with the sales order. This is reference only information.



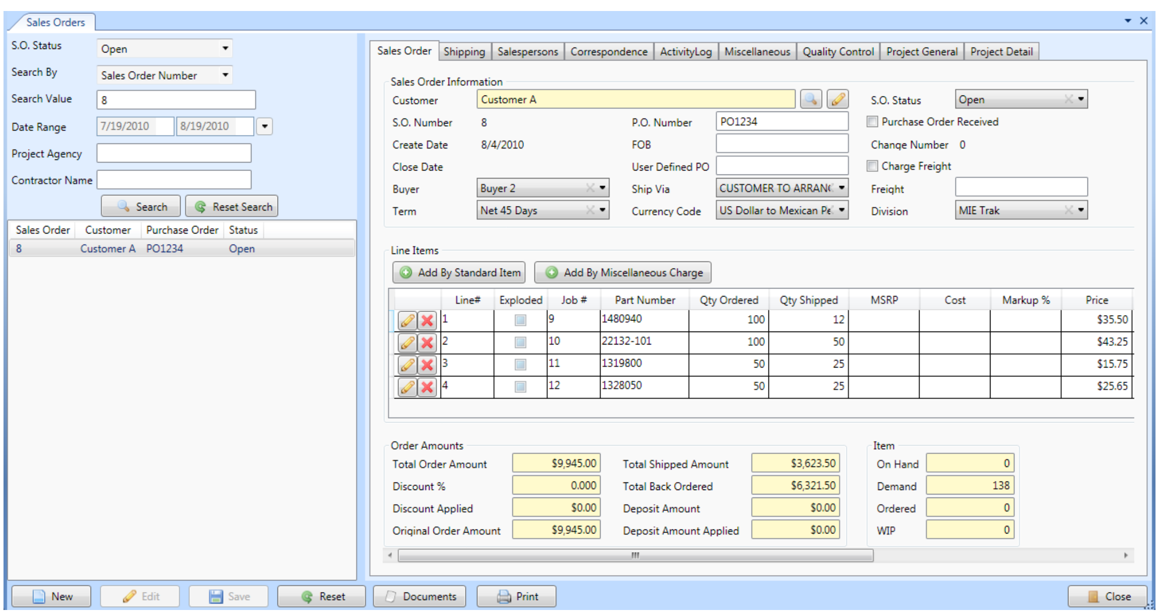


Edit Sales Order Line Items

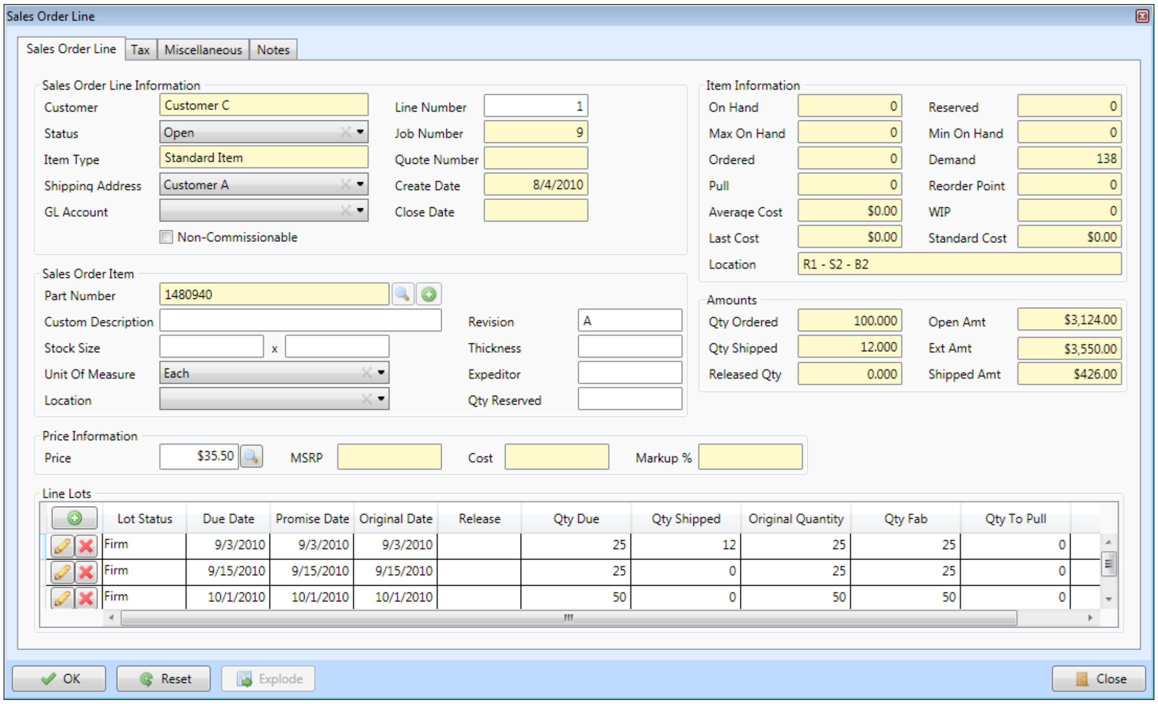
To edit a sales order line item click on the  button of the sales order that is to be modified. This action unlocks the sales order for the user who clicked on the edit button but locks the sales order for anyone else that may want to edit the record.



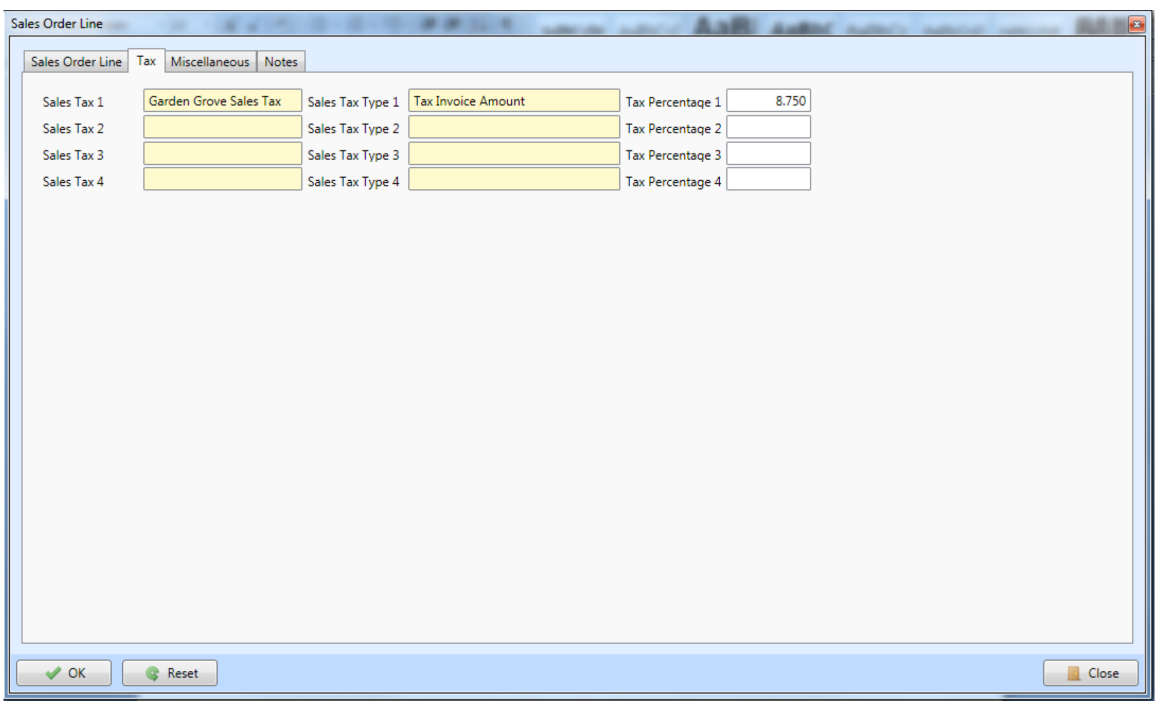
Now the sales order line items can be edited or deleted.

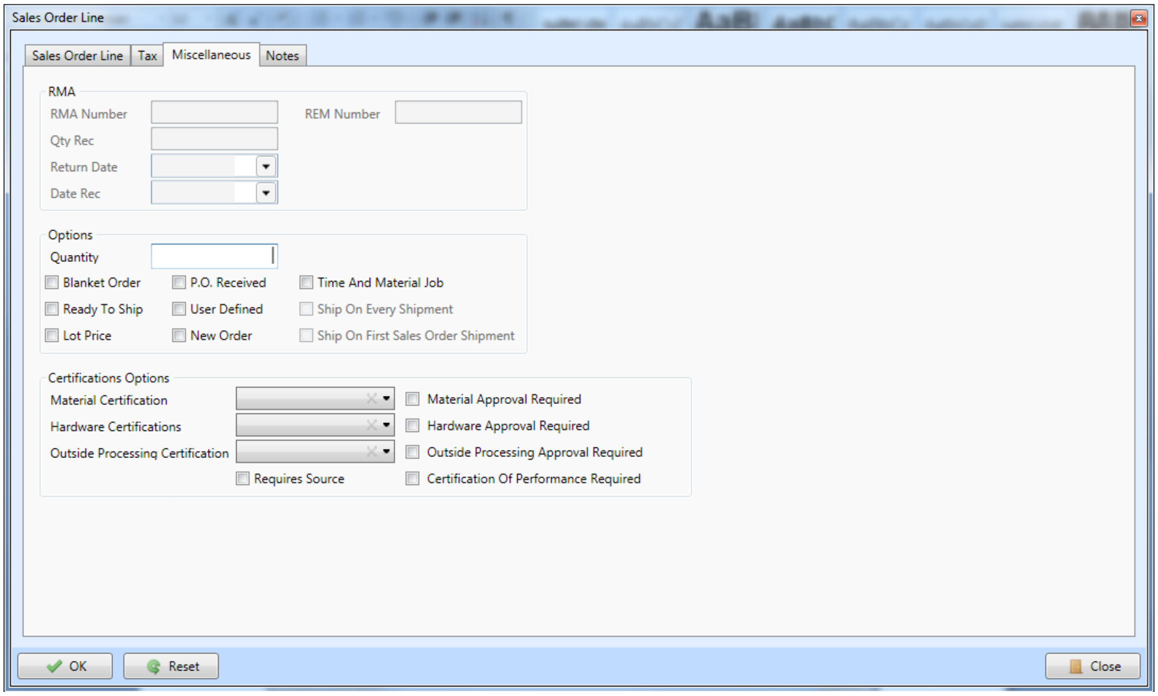


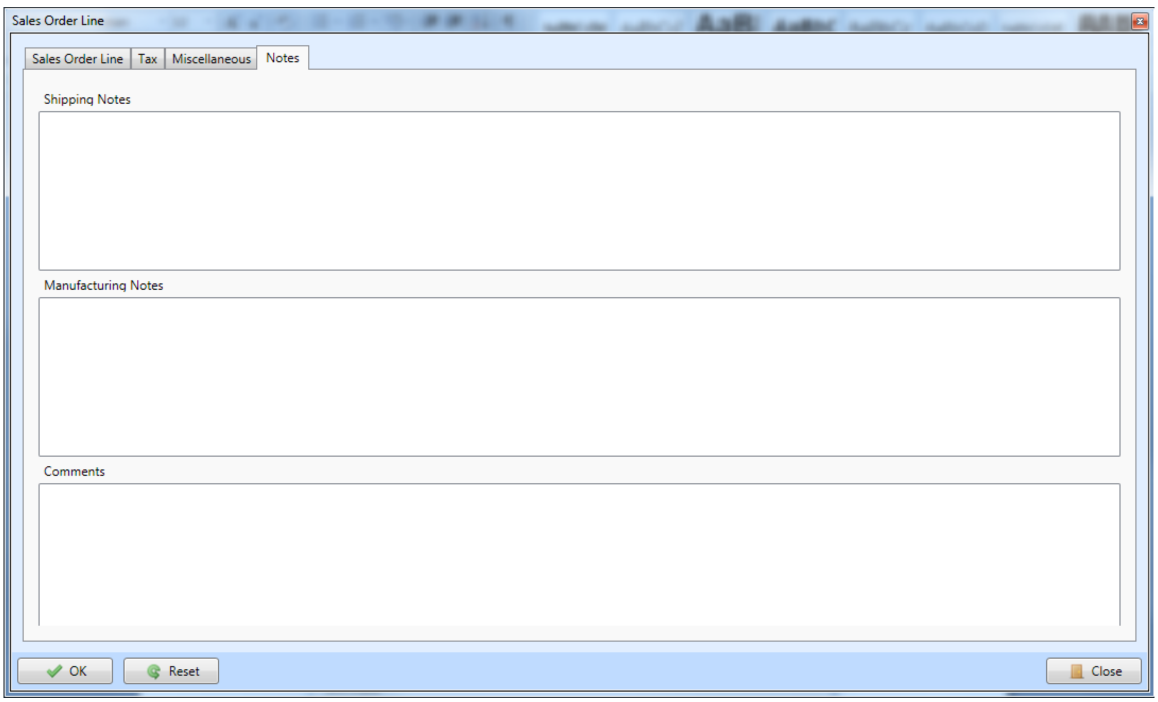
To edit a sales order line item click on the  *(edit)* button and the Sales Order Line screen appears.



To edit a sales







Summary of Usage