

MIE TRAK 2010.1
SHIPPERS / INVOICES
USER GUIDE

Readme

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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.)

A screenshot of the 'Logon' window in the MIE Trak application. The window has a blue title bar with the text 'Logon' and a close button. The main area is light blue and contains a large empty square on the left. To the right of the square are four input fields: 'Division' (a dropdown menu with 'MIE Trak' selected), 'ID' (a text box with '1'), 'Name' (a dropdown menu with 'Admin N/A' selected), and 'Password' (a text box with six dots). At the bottom right, there are two buttons: 'Logon' with a key icon and 'Exit' with a door icon.

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

MIE Trak Ribbon Bar

DESCRIPTION

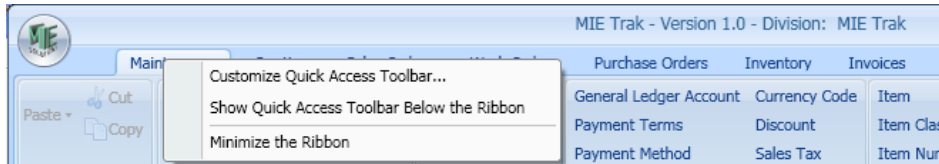
The MIE Trak ribbon bar is where the Invoices module is accessed.

The Invoices tab is where the daily modules for creating Packing Slips / Invoices and Manifests and running shipping and invoice reports are accessed.



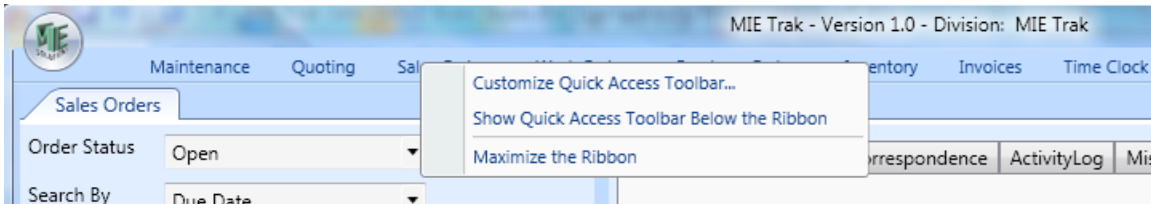
MINIMIZE THE RIBBON BAR

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.



MAXIMIZE THE RIBBON BAR

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.



Invoice Module

The Invoice module is used to create Packing Slips and Invoices in MIE Trak. The Invoice module is accessed from the Invoices tab on the MIE Trak ribbon bar and consists of the Search Query on the left and 6 tabs; Invoice, Shipping, Salespersons, Invoice Payments, Activity Log and Miscellaneous.

SEARCH QUERY

The Invoice Search Query gives the user the ability to query invoices by a number of statuses and to search by a number of variables.

KEY FIELDS

- Invoice Status Select the status of the invoice that the user wants to be listed. The statuses are All, Confirmed, Posted and Unconfirmed.
- Search By Select the search by option the user wants to look up invoices by. The options are Invoice Number, Customer, Date Range, Quote Number, Job Number, Item Number, S.O. Number, RMA Number, Part Number 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.

INVOICE TAB

The Invoice tab gives the user the ability to create a packing slip / invoice in MIE Trak and review or modify existing packing slips / invoices.

Invoice Shipping Salespersons Invoice Payments ActivityLog Miscellaneous

Invoice Information

Customer Invoice Status Unconfirmed

Invoice Number P.O. Number

Create Date Confirmed Date Post Date

Ship Date Payment Due

Discount Date Discount %

FOB User Defined

Ship Via Term Freight Code

Currency Code Division


Invoice Line Items

Line#	S.O. Line#	Job #	Part Number	Revision	Description	Shipped	Price	Tax	Extended Amount	Ordered	Notes
1		9	1480940	A	Plate, Tow Bar Support	12.00000	\$35.50		\$426.00	25.00000	
2		10	22132-101			50.00000	\$43.25		\$2,162.50	50.00000	
3		11	1319800	A	Spacer, hanger Bracket	25.00000	\$15.75		\$393.75	25.00000	
4		12	1328050	AH	Fender, Top, LH	25.00000	\$25.65		\$641.25	25.00000	
5	5	20	Tooling Charge		Tooling Charge	0.00000	\$250.00		\$0.00	1.00000	
6	6	21	Delivery Charge		Delivery Charge	0.00000	\$25.00		\$0.00	1.00000	




Total Invoice Amount

Taxable Amount Non-Taxable Amount Commission Amount
 Sales Tax 1 Amount Sales Tax 2 Amount Freight
 Sales Tax 3 Amount Sales Tax 4 Amount Total Amount

ENTERING NEW PACKING SLIP / INVOICE


To create a new packing slip/invoice click on the  button and the Add Invoice screen appears.

KEY FIELDS

Customer	Click on the  (<i>Search</i>) 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  (<i>Add</i>) button on the Search Party screen.
Search By	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  (<i>Add</i>) button and an Add Item screen will appear.

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Search Value	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.
Date Range	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.
Show # of Lots	

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.

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Invoice
Shipping
Salespersons
Invoice Payments
ActivityLog
Miscellaneous

Invoice Information

Customer Customer A Invoice Status Unconfirmed

Invoice Number 14 P.O. Number 123456DC

Create Date 8/24/2010 Confirmed Date ▼ Post Date ▼

Ship Date 8/24/2010 ▼ Payment Due ▼

Discount Date ▼ Discount %

FOB User Defined

Ship Via CUSTOMER TO ARR ▼ Term Net 45 Days ✕ ▼ Freight Code ✕ ▼

Currency Code US Dollar to Mexica ▼ Division MIE Trak ✕ ▼

Invoice Line Items

Line#	S.O. Line#	Job #	Part Number	Revision	Description	Shipped	Price	Tax	Extended Amount	Ordered	Notes
1	3	24	1319800	A	Spacer, hanger Bracket	25.00000	\$15.75	8.750	\$393.75	25.00000	
2	4	25	1328050	AH	Fender, Top, LH	25.00000	\$25.65	8.750	\$641.25	25.00000	
3	6	27	Delivery Charge		Delivery Charge	0.00000	\$25.00	8.750	\$0.00	1.00000	

Total Invoice Amount

<table style="width: 100%;"> <tr> <td style="width: 33%;">Taxable Amount \$1,035.0000</td> <td style="width: 33%;">Non-Taxable Amount \$0.0000</td> <td style="width: 33%;">Commission Amount \$0.0000</td> </tr> <tr> <td>Sales Tax 1 Amount \$90.5625</td> <td>Sales Tax 2 Amount \$0.0000</td> <td>Freight </td> </tr> <tr> <td>Sales Tax 3 Amount \$0.0000</td> <td>Sales Tax 4 Amount \$0.0000</td> <td>Total Amount \$1,125.5625</td> </tr> </table>	Taxable Amount \$1,035.0000	Non-Taxable Amount \$0.0000	Commission Amount \$0.0000	Sales Tax 1 Amount \$90.5625	Sales Tax 2 Amount \$0.0000	Freight 	Sales Tax 3 Amount \$0.0000	Sales Tax 4 Amount \$0.0000	Total Amount \$1,125.5625
Taxable Amount \$1,035.0000	Non-Taxable Amount \$0.0000	Commission Amount \$0.0000							
Sales Tax 1 Amount \$90.5625	Sales Tax 2 Amount \$0.0000	Freight 							
Sales Tax 3 Amount \$0.0000	Sales Tax 4 Amount \$0.0000	Total Amount \$1,125.5625							

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

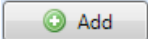
The Activity Log tab gives the user the ability to identify changes made to a sales order and the employee that made the changes.

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

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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 search on.


QUALITY CONTROL TAB

The Quality Control tab gives the user the ability to

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

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