

Manitou Core - Integration - Offline Account Linking

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This document explains the concept of offline account linking and how to accomplish it.



Important! Manitou Version 2.1 Required!

Account Linking

Account linking in its most generic sense refers to the process of connecting the account information of an entity that exists in two separate environments, assuming those environments have a way to point to an account in the other environment. An example would be an alarm customer in Manitou whose corresponding A/R account is in SedonaOffice. The Manitou customer can be assigned an A/R company and account number which point to the corresponding A/R site in SedonaOffice. The SedonaOffice site can be assigned "external link" information which points to the corresponding alarm customer in Manitou. When two such accounts exist but are not fully linked by both sides pointing to each other, they are a candidate for "account linking".

Account linking can typically be accomplished manually, one at a time, by going to an account's data entry screen and entering the necessary information. When there are many accounts that require linking, a bulk-linking tool is much more efficient. One such tool is the Sedona Linker which has been in use since the early 2000's. The Sedona Linker can be run locally at a customer site, by the customer, and performs the actual database updates as it runs. This tool, however, previously required direct access to both the Manitou and SedonaOffice databases. If a customer's data is stored in the cloud, direct database access is not available to that customer. Hence the necessity of "offline linking", in which the Sedona Linker plays a part.

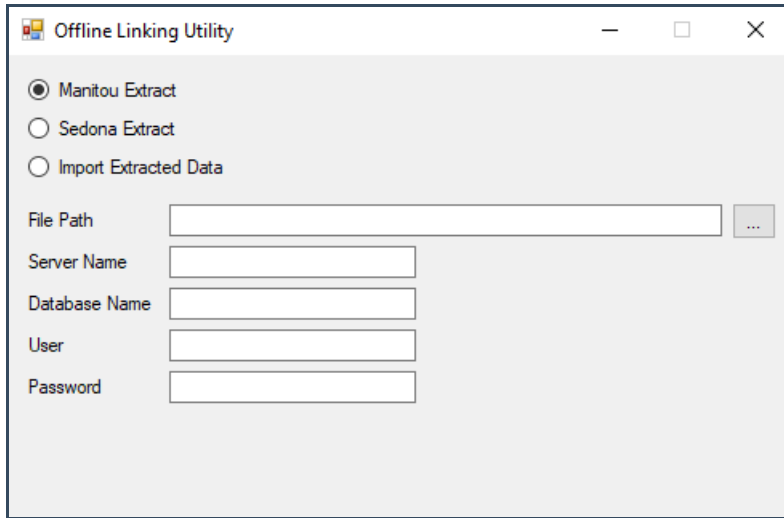
Offline Linking

Offline linking is used when one or both of a customer's environments (Manitou, SedonaOffice, etc.) requiring linking are stored in the cloud. A linking process typically needs several pieces of information for most all accounts in the database. Transferring that volume of information via API calls is inefficient and time-consuming. So, we have an "offline" process to extract the data one time from the live database, which is then used as the input to an offline linking tool. If the data is housed in the cloud, a Bold technician must perform the extract. If the data is local to the customer (not in the cloud), the customer can perform their own extract. The Sedona Linker has an "offline linking" option that uses the extracted data after it has been imported into an offline linking database. See the [Manitou-SO-AB Integration Documentation](#) for more information.

Offline Linking Utility

Extracting Data

To facilitate the extraction of data and its subsequent import into an offline linking database, the Offline Linking Utility is available for use. This should be used by a Bold technician when extracting from a cloud database, and by a customer when extracting from a local database or importing the extracted data.



This utility performs three functions:

1. Extract Manitou data necessary for offline linking via the Sedona Linker.
2. Extract SedonaOffice data necessary for offline linking via the Sedona Linker.
3. Import the extracted Manitou and SedonaOffice data into a database used by the offline linking functionality of the Sedona Linker.

When performing an extract, the File Path specifies where the extracted data will be placed. The Manitou extract consists of three files:

- OfflineLinkingManitouContpoints.txt
- OfflineLinkingManitouCustomers.txt
- OfflineLinkingManitouSystems.txt

The SedonaOffice extract consists of three files:

- OfflineLinkingSedonaSites.txt
- OfflineLinkingSedonaSystems.txt
- OfflineLinkingSedonaSystemTypes.txt

If Bold is performing the extract, those files are given to the customer.

Importing Data

When importing the extracted data, the File Path specifies where the extracted data has been placed. All of the above six files must have been placed in the File Path.

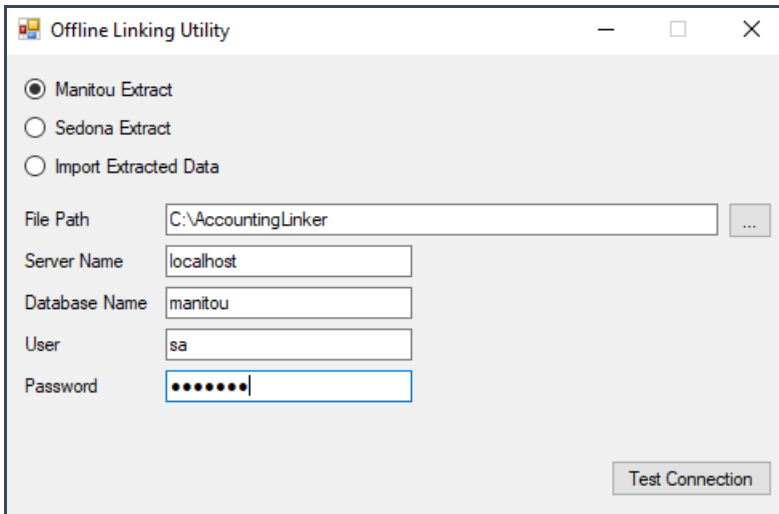
The remaining information on the form specifies the SQL server name, database name, and login credentials.

- When performing an extract, this is from where the data will be extracted.
 - The Manitou extract will verify that at least one record exists in the CUSTOMER table.
 - The SedonaOffice extract will verify that at least one record exists in the AR_Customer_Site table.
- When performing an import, this is to where the data will be imported. Only the existence of the database is verified. The import will drop the tables into which the data will be imported if they exist, then create the tables anew every time.

Important! The dB to import data into MUST be created already.

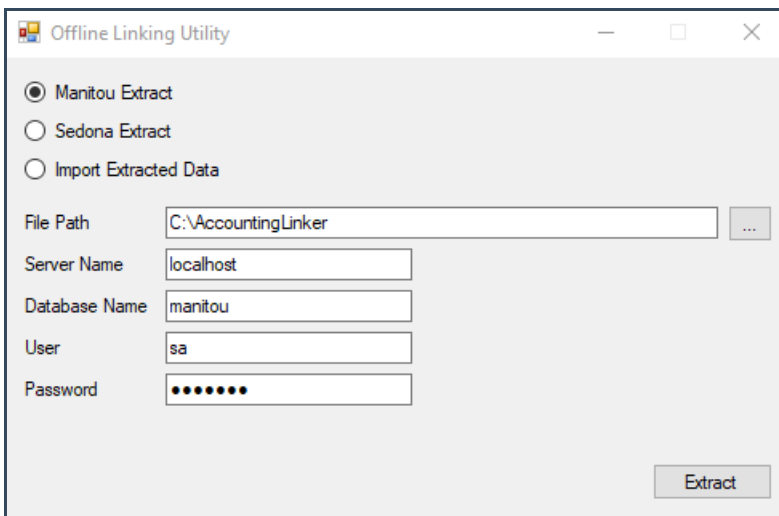
General

Once the SQL information has been populated, Test Connection will be available:



The screenshot shows the 'Offline Linking Utility' window. It has three radio buttons: 'Manitou Extract' (selected), 'Sedona Extract', and 'Import Extracted Data'. Below these are five text input fields: 'File Path' (C:\AccountingLinker), 'Server Name' (localhost), 'Database Name' (manitou), 'User' (sa), and 'Password' (masked with dots). A 'Test Connection' button is located at the bottom right.

Once the connection has been successfully validated, the Extract (or Import) button will be available:



The screenshot shows the 'Offline Linking Utility' window with the same configuration as the previous one. However, the 'Test Connection' button is no longer visible, and an 'Extract' button is now present at the bottom right.

As the extract or import is running, the Current Operation will be shown. If any errors are encountered, they will be displayed and the process will terminate. Once the extract or import is complete, the current operation will show "Process complete" and the Close button will be shown:

