

Manitou - SedonaCloud Linking Quick Start Guide

05/24/2024 8:10 am EDT

Overview

SedonaCloud / Manitou integration is very different from the legacy integration because it allows either side to be hosted in the BoldGroup Cloud offerings. This does mean that the previous method of doing bulk linking has to change as well. We have a temporary solution that keeps the same basic workflow but requires some off-line data to be gathered. To make this easier, we created additional utilities to handle these off-line task. This document provides the necessary top-level flow to completely accomplish Linking using SedonaCloud and/or Manitou Cloud.

These steps are specifically for Manitou <-> SedonaOffice linking, but could be applied to other scenarios as well.

1. Use the Offline Linking Utility to extract Manitou data
2. Use the Offline Linking Utility to extract SedonaOffice data
3. Using the Offline Linking Utility, import extracted data into an "offline linking" database local to the user.
4. Run the Sedona Linker in offline linking mode
5. Run the Accounting Linker to apply the identified changes

Steps 1 and/or 2 may need to be done by BoldGroup but the rest can be done by the customer.

These tools are included in Package 91

Offline Linking Utility

See the [Manitou Core - Integration - Offline Account Linking](#) for complete information.

When extracting Manitou data, if Bold is doing the extract, we will have to run this tool and supply the files to the customer.

When extracting SedonaOffice data, if Bold is doing the extract, we will have to run this tool and supply the files to the customer.

Sedona Linker

Run the Sedona Linker. Choose "offline linking" and specify the "offline linking" database from the previous step.

The Sedona Linker will create a JSON file containing the information necessary to link the specified accounts. Use this file as the "File To Process" in the Accounting Linker.

Accounting Linker

The Accounting Linker will ultimately perform the updates to complete the physical linking of the accounts.