Manitou to Managely Accounting Setup (customer steps)

08/07/2024 6:49 pm EDT

Creating an Accounting Company

An Accounting Company first needs to be entered into the Supervisor Workstation to be used when configuring the Router setup.

1. In Supervisor Workstation go to Maintenance | Accounting Companies; click Edit
2. Click the Add The Add Accounting Company dialog box appears.
3. Enter an appropriate name for the Managely Accounting Company in the Company ID
4. Select Accounting to Manitou CS, Manitou CS to Accounting, or Dealer Billing from the Interface Type drop-down list box. This "direction" essentially specifies which application controls changes in billing, and in which application a new account is first entered. However, when the direction is Manitou to Accounting, a new account can be entered in Managely first. It is of utmost importance to discuss the functionality and determine which direction is appropriate.
   1. Accounting to Manitou: All billing is manually entered and maintained in Managely.
   2. Manitou to Accounting: Assuming the "Customer Push" option is enabled for the company, customer changes in Manitou are pushed to Managely. NOTE: as billable monitoring services are added, modified, or removed

in Manitou, recurring is NOT currently adjusted appropriately in Managely.

   3. Dealer Billing: This is currently not supported with the Managely integration.

5. Select Managely from the Application drop-down list box.
6. The Name drop-down list will be populated with the available Managely Companies. Select the appropriate company.
7. Click OK.
8. The information on the main form can then be entered

DSN is not used by Managely integration.

User and Password are not used by Managely.

Server is not used by Managely integration.

Update common fields: If this option is not enabled, Manitou will not attempt to update Managely when the customer name, address, or contact points are updated. If this option is enabled, common fields are updated regardless of integration direction. In other words, even if the direction is Accounting to Manitou, changes to name, address, or contact points in Manitou will update Managely. If the direction is Manitou to Accounting and Push Customer Changes is enabled, that option takes precedence over this one.

Account ID required: Specifies whether or not an A/R number must be entered when this accounting company is selected on a customer. This is forced to “enabled” for Managely integration.

Force Account ID to be unique: Specifies whether or not the same A/R number can be assigned to more than one customer in the same accounting company. This is forced to "enabled" for Managely integration.

Force services to be one-to-one with recurring: This is not used by the Managely integration. Recurring is not currently supported.

Push customer changes: This option must be enabled to push any changes other than the update of "common fields" (as defined above) to Managely. This includes the addition and deletion of systems. Under normal circumstances, this should always be enabled.

You MUST have Push customer changes enabled to create a brand new Managely customer from a Manitou Customer. This is also true from the new customer wizard in Manitou.

Additional companies can be added at this point if desired. Click Save when all desired companies have been added to save all the accounting company information.

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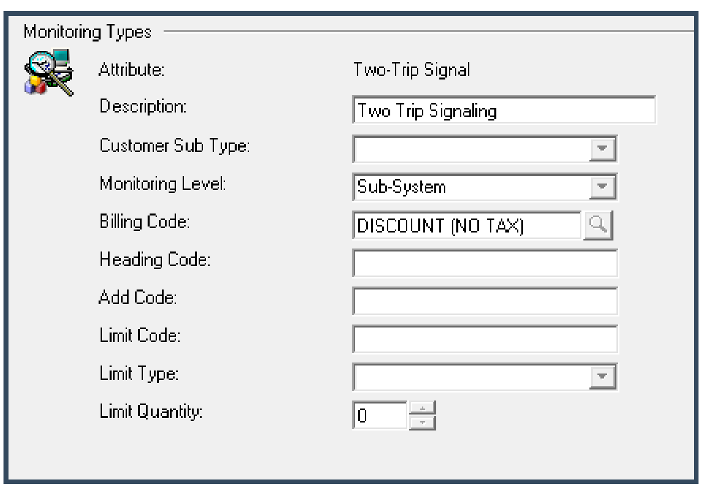
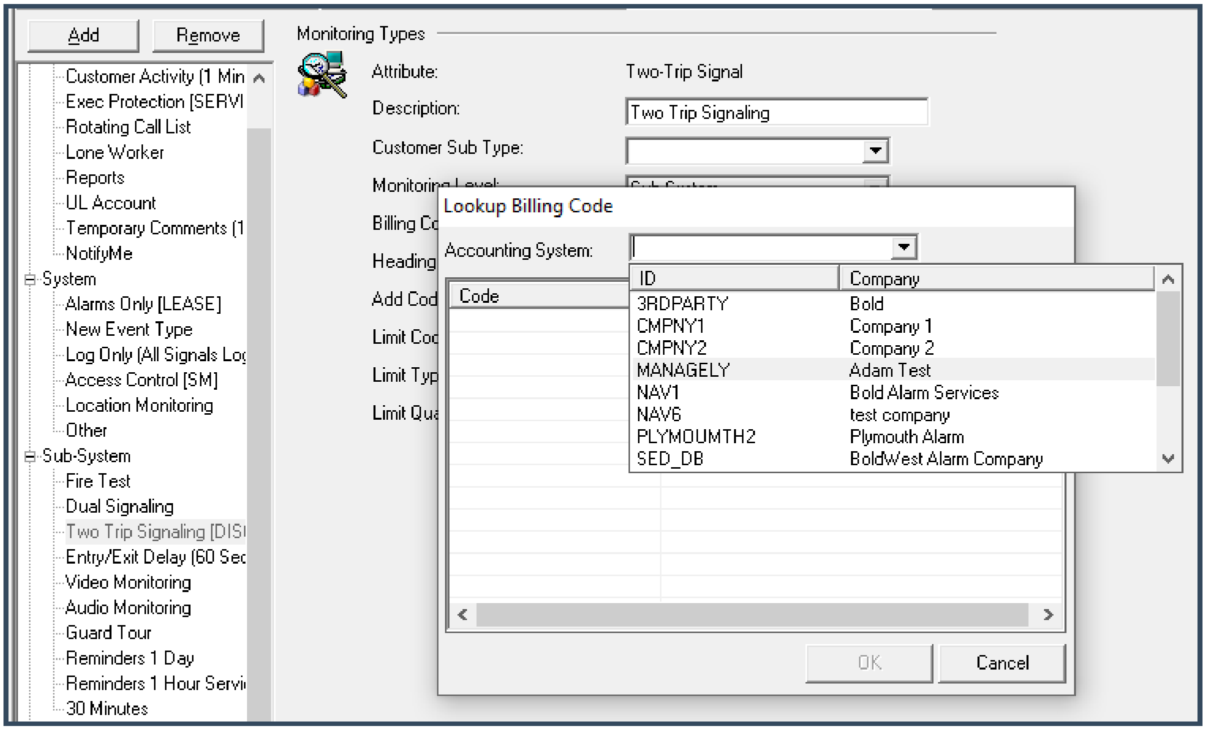
Defining Billable Charges

Although you can link billing codes to Monitoring Types, the ability to create recurring items in Managely has not yet been developed.

Manitou Monitoring Types are the link between billable services in Manitou and their associated charges in Managely. A monitoring type is attached to a monitoring service of a customer. The billing code of that monitoring type is then used as the recurring item when that billing information is pushed into Managely. Monitoring type definitions are entered in Supervisor Workstation | Maintenance | Setup | Monitoring Types.



Billing Code. The available item codes from Managely can be looked up by clicking the magnifying glass.



Once the desired accounting system (company) is selected, the available billing (item) codes will be displayed, allowing a code to be selected. If the desired item code does not yet exist in Managely, it will be necessary to add it in Managely first, then it can be selected here.

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Dealer Billing/Third Party Billing

This is not currently supported.

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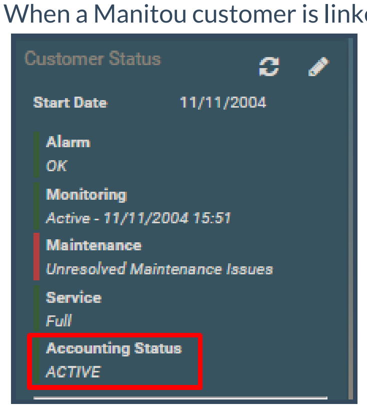
Accounting Status

When a Manitou customer is linked to accounting, the Customer Status section includes the accounting site's status:



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Accounting Functions

When a Manitou customer is linked to accounting, the additional "Accounting" menu item is hidden since all the items in this menu are service ticket related and Managely doesn't currently have service functions.

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Common Fields

One of the accounting company setup options is "Update Common Fields". The "common fields" consist of the name and address information as a whole, plus the individual contact points explained below. Note that the Manitou address labels may be different based on the country setup.

Manitou	Managely
Name Address 1 Address 2 City State Zip Code	Name Address 1 Address 2 City State Zip
First contact point of type "phone"	Phone 1
First contact point of type "e-mail"	E-Mail

If so optioned in the integration setup, when any of the common fields are changed in Manitou, the corresponding field in Managely is updated.

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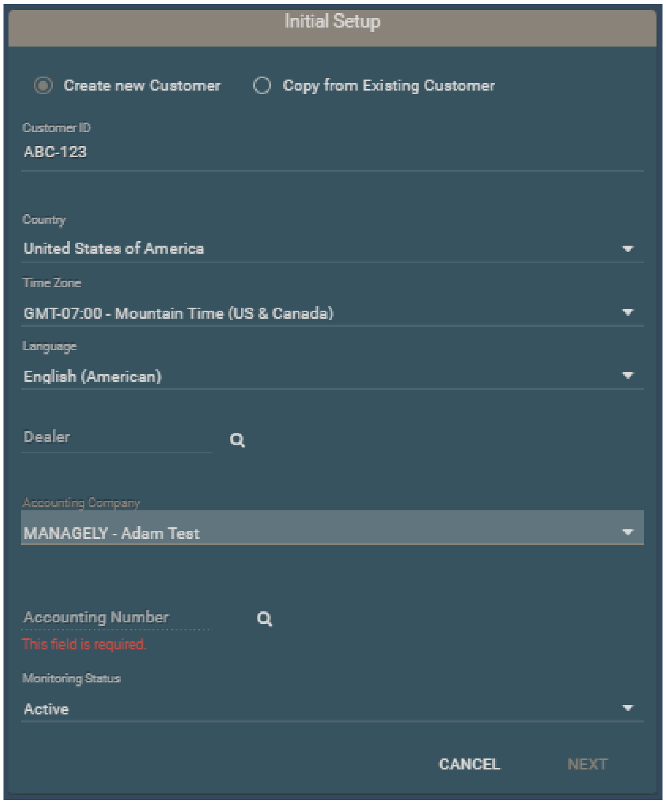
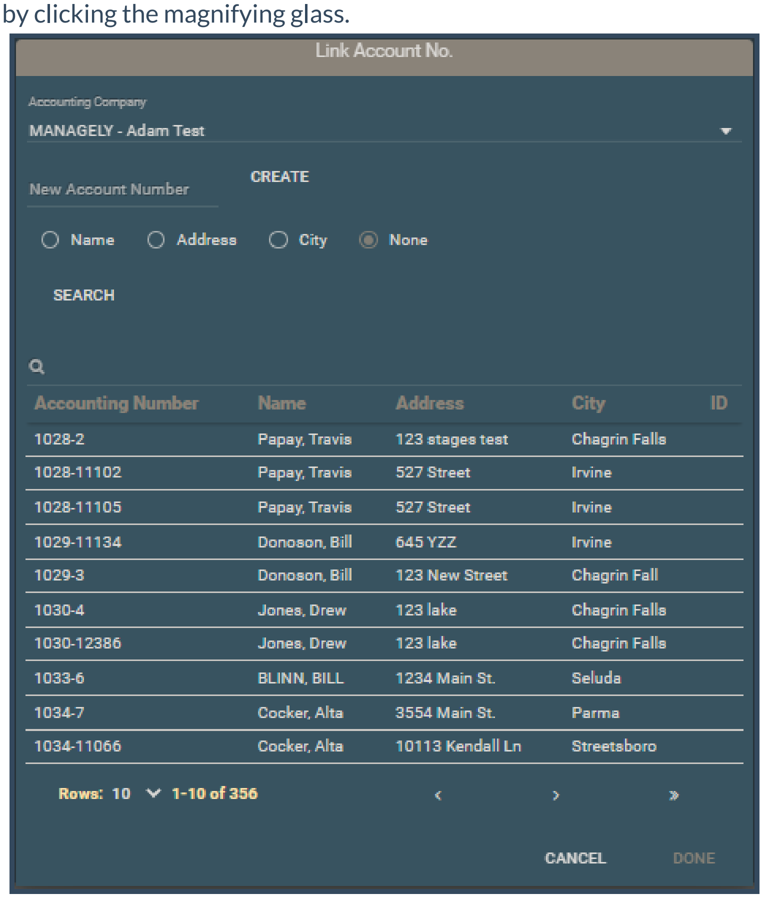
Entering a New Customer



When entering a new Manitou customer that will either be tied to an existing Managely site or pushed into Managely as a new site, the appropriate A/R Company is selected from the drop-down list. Next, the A/R Number look-up is performed by clicking the magnifying glass.



If the integration direction is Manitou to Accounting, and the Managely site does not yet exist, click the Create button to auto-assign the A/R Number using the next available account number in Managely. The lookup form is immediately closed and the A/R Number field is populated with "* (AUTO)". When the new customer is first saved, the account will be created in Managely, after which Manitou will show the account number that got assigned.

If the integration direction is Accounting to Manitou, the customer information must be entered in Managely first, so the Create New portion of the form is disabled.

Search for Existing is used to find the appropriate site in Managely. The search can be filtered by Name, Address, or City. Selecting None will return all accounts available to be linked. However, no more than 200 accounts will be shown at one time. Additional filtering may be necessary to limit the total number displayed so that the desired account is included in the results. Once the desired account is located, select that line and click OK. The lookup form is closed and the A/R Number and Name fields are populated with the information from Managely.

After the remainder of the New Customer Information has been entered/verified, click the Next button. The "normal" customer information screen is then shown.

If the customer is tied to an existing Managely site, the "common fields" (address information here and contact points on Details screen) are pre-populated from the information in Managely.

If the customer is new to Managely, the A/R Number will still show "* (AUTO)". The name, address, and "common" contact points entered here will be pushed into Managely when the new customer is first saved.

Note that the A/R Number is comprised of the Managely customer number plus the Managely customer site ID (<customer number>-<site ID>). This format may be referenced in this or other documentation as a “two-tiered” account number because it is comprised of two components.

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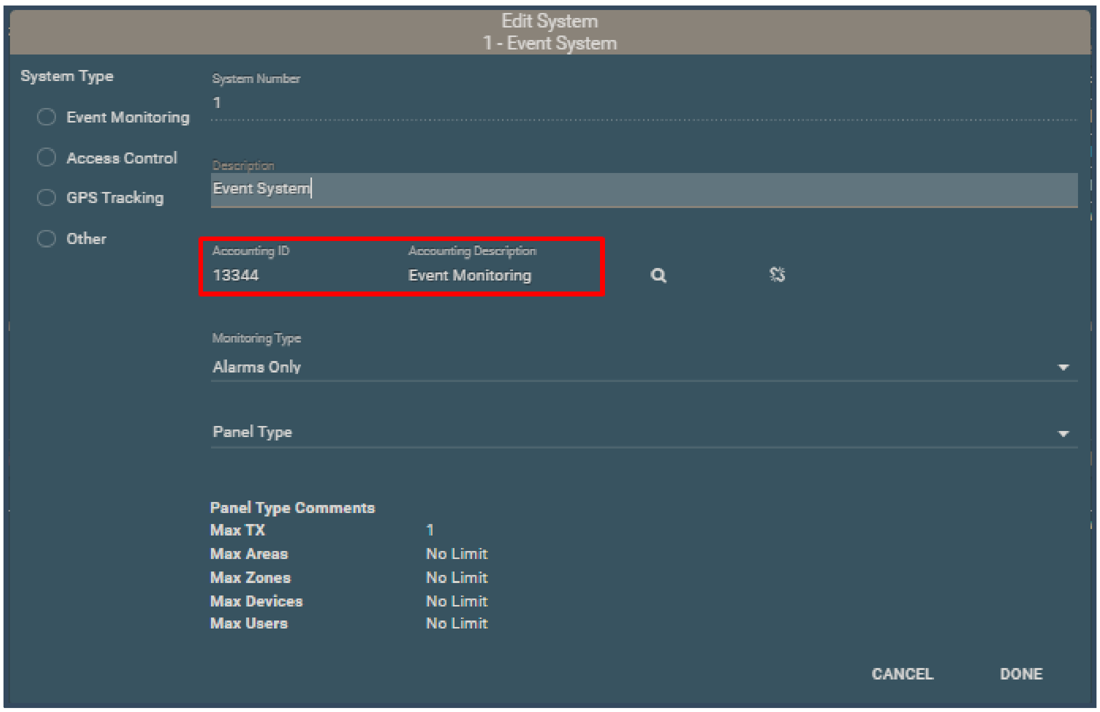
Systems

Manitou systems can be tied to Managely systems. If the integration direction dictates that Manitou will push changes into Managely, and the Manitou customer is currently tied to Managely, adding a new system in Manitou will automatically create the system in Managely and tie the two together. Following is an example Manitou system screen:



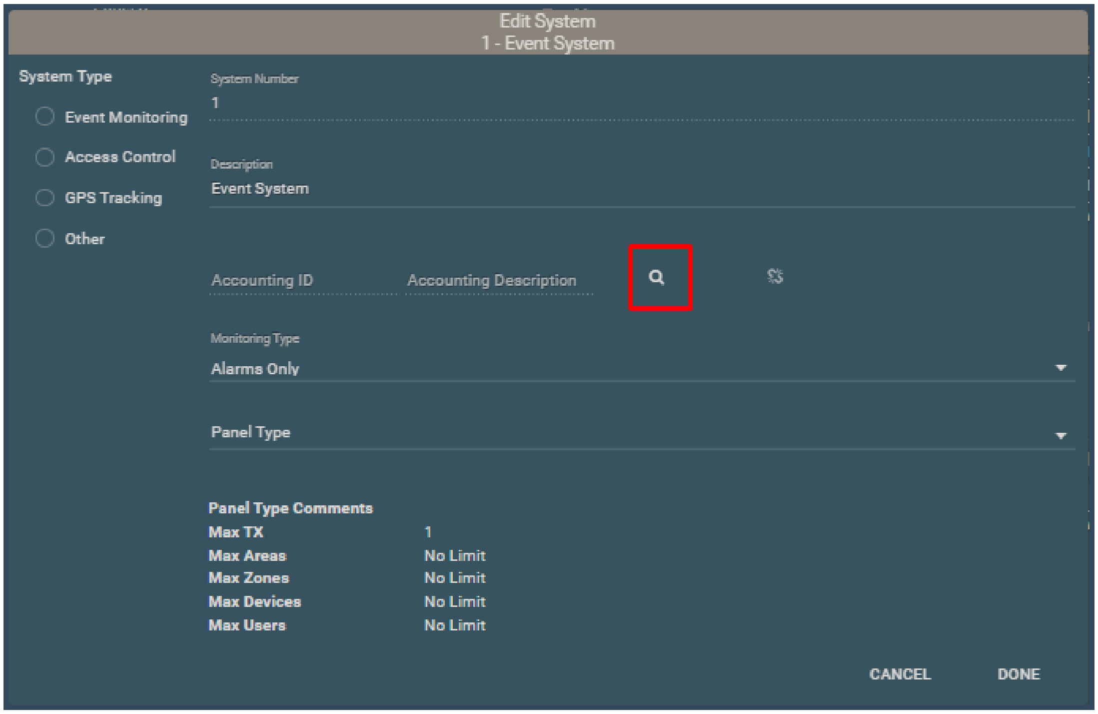
In the above example, the System ID is populated with the Customer System Id from Managely. A value in this field indicates the Manitou system is tied to the corresponding Managely system.

When pushing a new system to Managely, the following table shows the field mappings that are used. The Use Manitou system description as system ID in Managely integration option dictates if the Manitou customer ID or the system’s description will be pushed into the Managely system’s alarm account (system number) field.

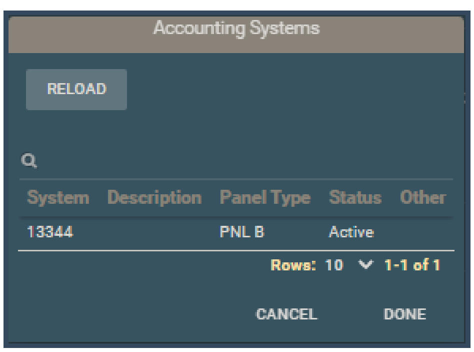
Manitou System	Managely System
Customer ID or System Description	Alarm ACcount (System Number)
Managely Default Warranty Labor	Warranty Labor
Part found in Managely Parts by Manitou Panel Type	Panel Type
Managely Default Warranty Part	Warranty Part
Current date	Warranty Start
Managely Default Service Level	Service Level

Managely Default System Type	System Type
"Manitou Created"	System Comments

A Manitou system can be manually linked to a Managely system using the system lookup dialog. Click the magnifying glass next to the Accounting Description field:

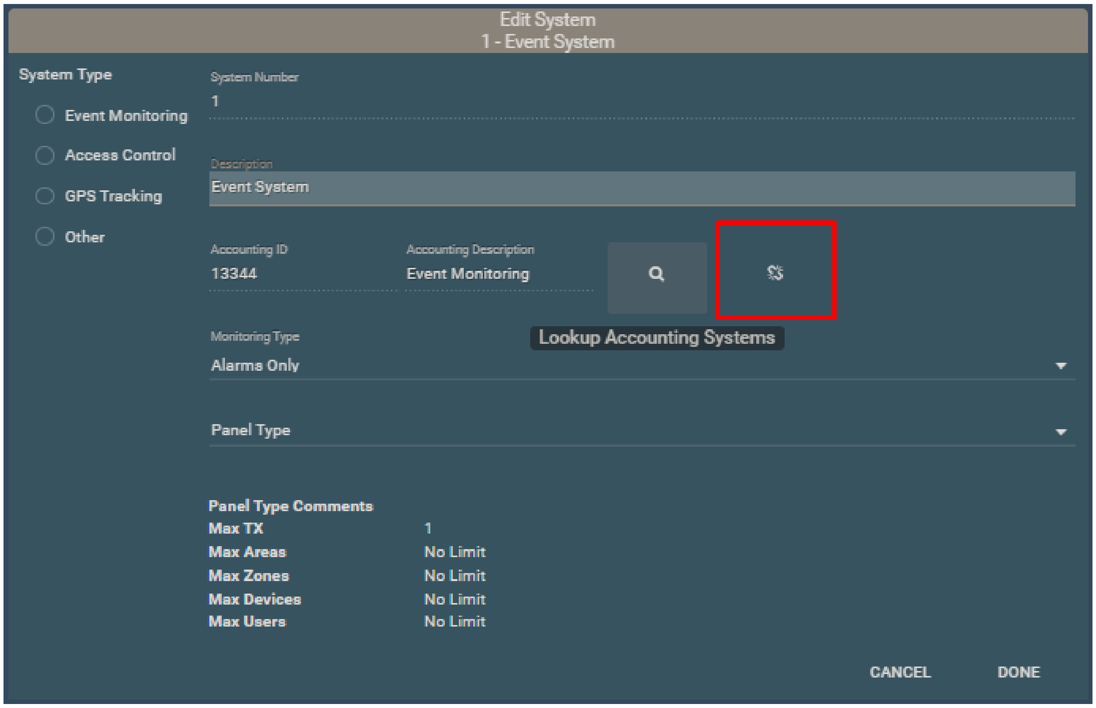


The lookup dialog is displayed:



If there are any Managely systems available to be linked, they will be displayed in the dialog. Selecting one and pressing DONE will link the selected Managely system to the Manitou system. At that time, the Manitou system description can be optionally replaced with the description from Managely.

If the Manitou and Managely systems are currently linked, to unlink them click the X. The linking will be removed and the Accounting ID fields will be empty.



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