

Manitou to Managely Accounting Setup (customer steps)

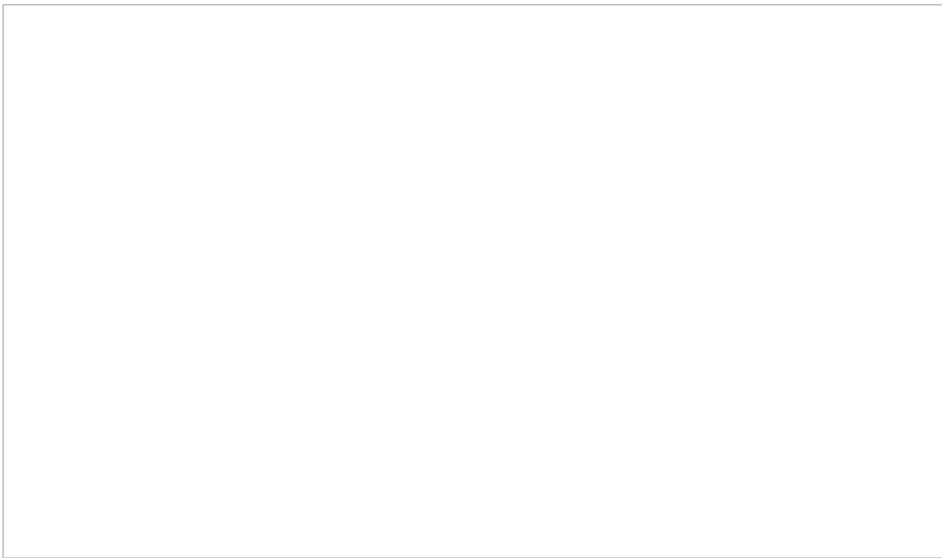
08/07/2024 6:49 pm EDT

- Creating an Accounting Company
- Defining Billable Charges
- Dealer Billing/Third Party Billing
- Accounting Status
- Accounting Functions
- Common Fields
- Entering a new customer
- Systems

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.

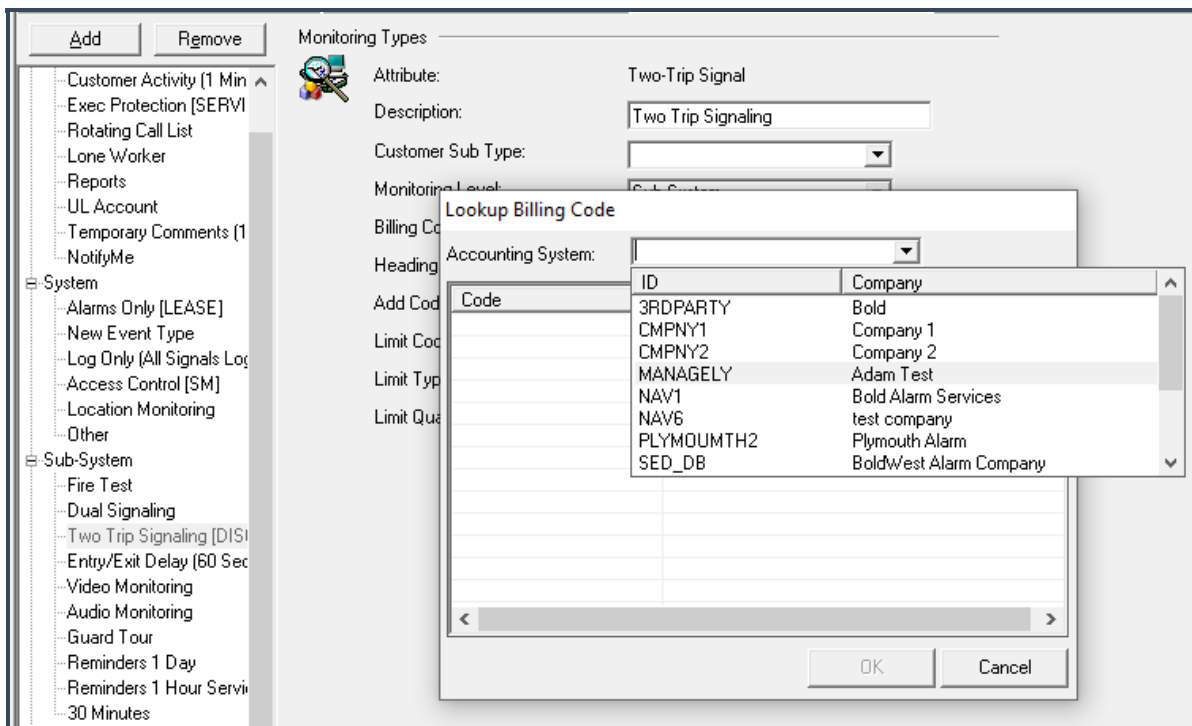
[Return to Contents](#)

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.

[Return to Contents](#)

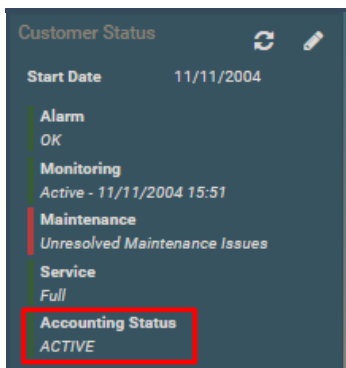
Dealer Billing/Third Party Billing

This is not currently supported.

[Return to Contents](#)

Accounting Status

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



[Return to Contents](#)

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.

[Return to Contents](#)

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	Name
Address 1	Address 1
Address 2	Address 2
City	City
State	State
Zip Code	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.

[Return to Contents](#)

Entering a New Customer

Initial Setup

☒ Create new Customer
 ☐ Copy from Existing Customer

Customer ID
ABC-123

Country
United States of America

Time Zone
GMT-07:00 - Mountain Time (US & Canada)

Language
English (American)

Dealer

Accounting Company
MANAGELY - Adam Test

Accounting Number
This field is required.

Monitoring Status
Active

CANCELNEXT

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.

Link Account No.

Accounting Company
MANAGELY - Adam Test

New Account Number

☐ Name
 ☐ Address
 ☐ City
 ☒ None

SEARCH

Q

Accounting Number	Name	Address	City	ID
1028-2	Papay, Travis	123 stages test	Chagrin Falls	
1028-11102	Papay, Travis	527 Street	Irvine	
1028-11105	Papay, Travis	527 Street	Irvine	
1029-11134	Donoson, Bill	645 YZZ	Irvine	
1029-3	Donoson, Bill	123 New Street	Chagrin Fall	
1030-4	Jones, Drew	123 lake	Chagrin Falls	
1030-12386	Jones, Drew	123 lake	Chagrin Falls	
1033-6	BLINN, BILL	1234 Main St.	Seluda	
1034-7	Cocker, Alta	3554 Main St.	Parma	
1034-11066	Cocker, Alta	10113 Kendall Ln	Streetsboro	

Rows: 10

1-10 of 356

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CANCELDONE

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.

The screenshot shows the 'Customer Wizard - Sally Fields' form, specifically the 'NAME & ADDRESS' step. The form is divided into several sections with labels above them: NAME & ADDRESS, CONTACT POINTS, MONITORING DETAILS, SYSTEMS, CONTACTS, CALL LISTS, and USER DEFINED FIELDS. The 'NAME & ADDRESS' section contains the following fields:

- Customer Type:** A dropdown menu.
- Customer ID - Auto Generate:** A text field containing 'ABC-123'.
- Name:** A text field containing 'Sally Fields'.
- Search By:** A text field containing 'SALLY FIELDS'.
- Account Type:** A dropdown menu with 'Normal Account' selected.
- Related Type:** A dropdown menu with 'Normal' selected.
- Zip Code:** A text field containing '92606'.
- City:** A text field containing 'Irvine'.
- State (United States of America):** A dropdown menu with 'California' selected.
- Street1:** A text field containing '645 YZZ'.
- Street2:** A text field.
- Latitude:** A text field.
- Longitude:** A text field.
- Cross Street:** A text field.
- Time Zone:** A dropdown menu with 'GMT-07:00 - Mountain Time (US & Canada)' selected.
- Subdivision:** A text field.
- Language:** A dropdown menu with 'English (American)' selected.
- Country:** A dropdown menu with 'United States of America' selected.
- Accounting Company:** A text field containing 'MANAGELY - Adam Test'.
- Accounting Number:** A text field containing '1029-11134'.

At the bottom right of the form, there are three buttons: CANCEL, NEXT, and FINISH.

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.

[Return to Contents](#)

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:

The screenshot shows the 'Edit System' interface for '1 - Event System'. The 'System Type' is set to 'Event Monitoring'. The 'System Number' is '1'. The 'Description' is 'Event System'. The 'Accounting ID' is '13344' and the 'Accounting Description' is 'Event Monitoring'. The 'Monitoring Type' is 'Alarms Only'. The 'Panel Type' is not specified. The 'Panel Type Comments' section lists 'Max TX' as '1' and 'Max Areas', 'Max Zones', 'Max Devices', and 'Max Users' as 'No Limit'. The 'CANCEL' and 'DONE' buttons are at the bottom right.

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:

System	Description	Panel Type	Status	Other
13344	PNL B		Active	

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.

Edit System
1 - Event System

System Type

☒ Event Monitoring

☐ Access Control

☐ GPS Tracking

☐ Other

System Number

1

Description

Event System

Accounting ID

13344

Accounting Description

Event Monitoring

Monitoring Type

Alarms Only

Panel Type

Panel Type Comments

Max TX

1

Max Areas

No Limit

Max Zones

No Limit

Max Devices

No Limit

Max Users

No Limit

Lookup Accounting Systems

CANCEL

DONE

[Return to Contents](#)
