

Manitou to Managely Integration (internal steps)

08/05/2024 12:52 pm EDT

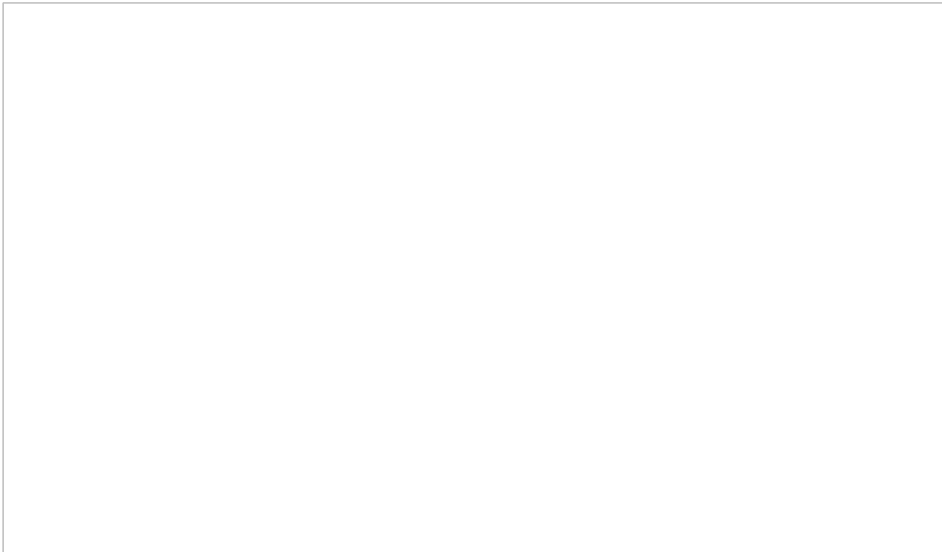
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NOTE: [Creating an Accounting Company](#) needs to be completed prior to Router Configuration.

Creating an Accounting Company

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

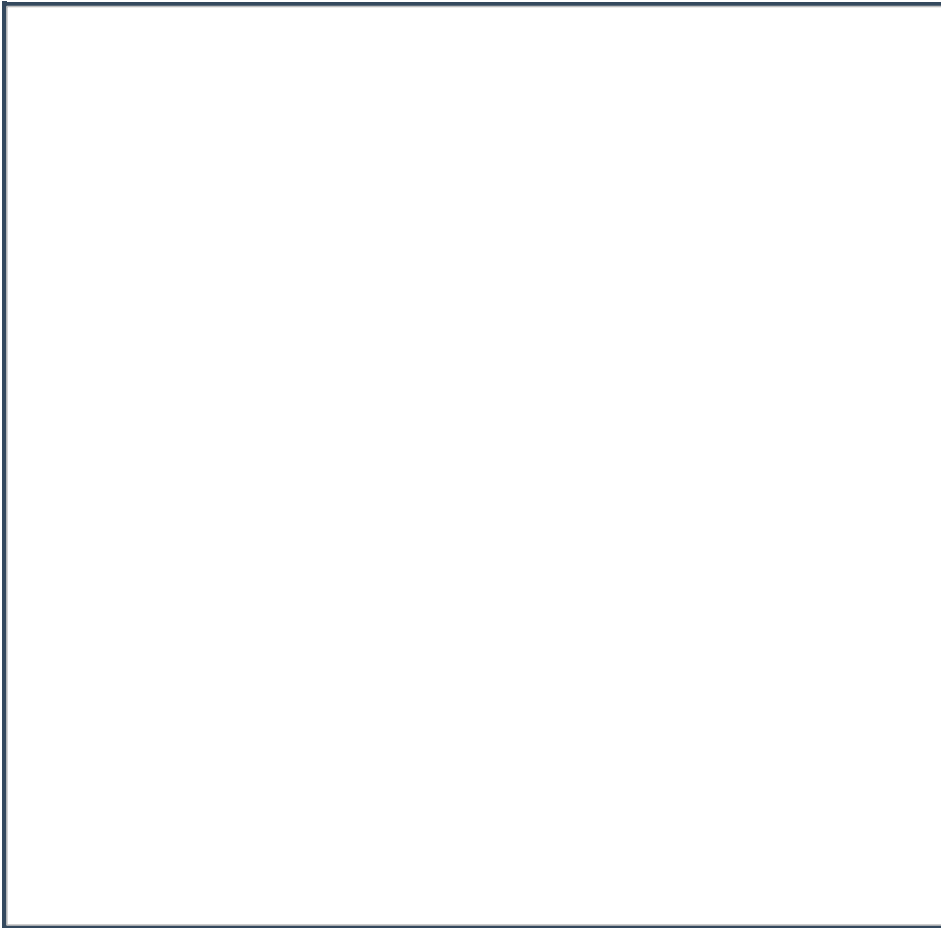
1. In Supervisor Workstation go to Maintenance | Accounting Companies; click Edit
2. Click the Add The Add Accounting Company dialog box appears.



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.

- a. Accounting to Manitou: All billing is manually entered and maintained in Managely.
- b. 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.
- c. 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.

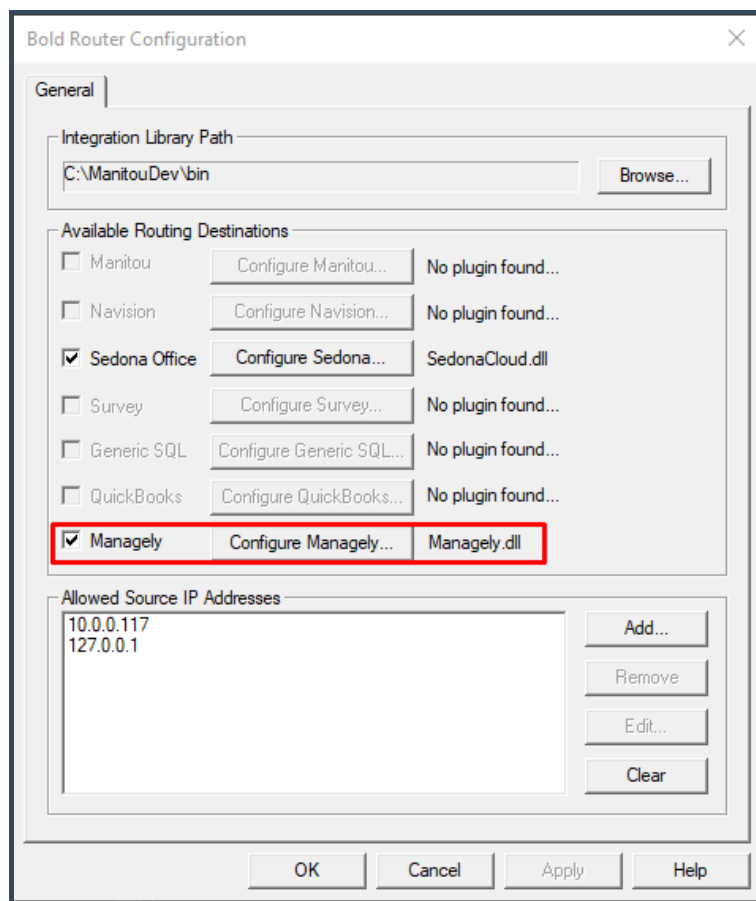


You **MUST** have Push customer changes enabled to create a brand new Managely customer from a Manitou Customer. This is also true from the new customer wizard in Manitou.

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.

Router Configuration

1. Go to the Manitou folder on the Manitou Server that will host the Router.
2. Check to ensure the required dll's (listed below) are in the Manitou folder. If not, look in the patch folders for the latest versions and copy them into the Manitou folder. BoldTechnologies.Drivers.Managely.dll, IdentityModel.dll, Managely.dll, Microsoft.Bcl.AsyncInterfaces.dll, Newtonsoft.Json.dll, System Buffers.dll, System.Memory.dll, System.Numerics.Vectors.dll, System.Runtime.CompilerServices.Unsafe.dll, System.Text.Encoding.Web.dll, System.Text.Json.dll, System.Threading.Tasks.Extensions.dll and System.ValueTuple.dll are required.
3. Right-click RouterConfig.exe and select Run as Administrator. The Bold Router Configuration window appears.



4. Click the Browse button next to the Integration Library Path
5. Go to the Manitou folder and click OK.



Note: The Configure Managely button is now active. Managely.dll will be shown to the right.

6. Check the Managely check box.
7. Click the Configure Managely button. The Setup dialog box will be displayed.

Managely Library Setup

Company URL mappings

	Company Name	URL	User ID	User Password	Safe Host
✎	Managely	http://managelyqa.com/	Test	Test	☒
✎					☐

Customer Create Sales Person Name

☒ Update customer address
☒ Customer name "Last, First"
☒ Use Manitou system description as System Number in Managely
☒ Inactivate site and systems on Manitou deactivate/delete
☒ Also cancel customer

OK Cancel

The Company Name here must match the company name (not ID) entered in Accounting Companies setup in Supervisor Workstation. Multiple companies may be entered here to accommodate multiple Managely companies configured in Supervisor Workstation.

The URL, User ID, and User Password are set according to the Managely installation. Safe Host disables certificate verification.

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Options Common to both installations

Customer Create Sales Person Name: When creating a Managely customer, this is the name of the salesperson to use. It has to match the name of a salesperson in Managely exactly and the employee has to be set as a salesperson.

The screenshot shows the BOLD GROUP software interface. On the left, the 'Setup' menu is highlighted with a red box. In the center, the 'Employees' list is displayed. The 'Employees' list has columns for Image, Name, User, Email, Technician, Salesperson, and actions (Edit, Delete, Docs). The 'Salesperson' column for the employee 'Manitou' is highlighted with a red box, showing a 'YES' status. The 'Setup' menu on the left also has a red box around the 'Employees' option.

Update Customer Address: When a Managely site's address, phone number, or e-mail is updated by Manitou, the Managely's site's customer's corresponding information can optionally be updated as well.

Customer name “Last, First”: If this option is enabled, the Manitou customer “search name” field (converted to title case) is used instead of the “normal” customer name to populate the Managely customer/site name.

Use Manitou system description as system ID in Managely: By default, the Manitou customer ID is used to populate the Managely system number. If it is desired to use the Manitou system’s description (not to be confused with the system type description) to populate the Managely system number, enable this option.

Inactivate site and systems on Manitou deactivate/delete and Also cancel customer:

When a Manitou customer changed to inactive or deactive then:

- If this is not enabled, Managely is left unchanged.
- If this is enabled:
 - The Managely site is inactivated.
 - The Managely systems for that site are inactivated.
 - If there are no other active sites remaining on the Managely customer:
 - If “Also cancel customer” is enabled, the customer is terminated.

Manitou will deactivate customers/sites/systems but does not currently activate/reactivate them.

NOTE: Customer/Site defaults used to create customers/sites are set up in Managely under Setup->Company->System Defaults.

The screenshot shows the 'System Defaults' configuration page in the Bold Group software. The left sidebar contains a navigation menu with 'Setup' highlighted. The main area is divided into two columns. The left column contains various default settings such as 'Next Customer Number' (4363), 'Next Invoice Number' (3495), 'Next Vendor Number' (3001), 'Next Purchase Order Number' (1105), 'Accounting Open Date' (10/1/2014), 'Fiscal Year Starts' (1/1/2022), 'Labor Warranty' (Labor - 1 Year), 'Part Warranty' (Parts - 1 Year), 'Service Level' (Time and Material - Commercial), 'Work Order Type' (Service Call), 'Invoice Delivery' (Print), 'New Work Order Status' (New), 'CC/Checks Funding Month' (Current Month), 'Select Day for RMR Cycle' (OFF), 'Show Late Fees on Invoice' (ON), 'Auto Apply Payments/Credits' (ON), and 'Email RMR Payment Receipt' (ON). The right column contains dropdown menus for 'Customer Type' (Commercial), 'System Type' (Burglar Alarm), 'Billing Cycle' (Monthly), 'Default Term' (Net 15), 'Recurring Term' (Net 10), 'Service Invoice Term' (Due on Receipt), 'Manual Invoice Term' (Net 30 Days), 'Sales Tax' (Michigan), 'Country' (United States), 'Marketing Source' (Google), 'Default Vendor' (ADI), 'Customer Portal Work Order Type' (Service Call), and 'Customer Portal Work Order Status' (New). At the bottom, there is a 'Recurring Invoice Memo' field and a 'Thanks for being a valued customer.' message.

Click OK when finished with the Library Setup dialog. You return to the Bold Router Configuration.

In the bottom section of the Bold Router Configuration type the IP address of each of the Manitou machines, the IP address of 127.0.0.1.

To add each IP address:

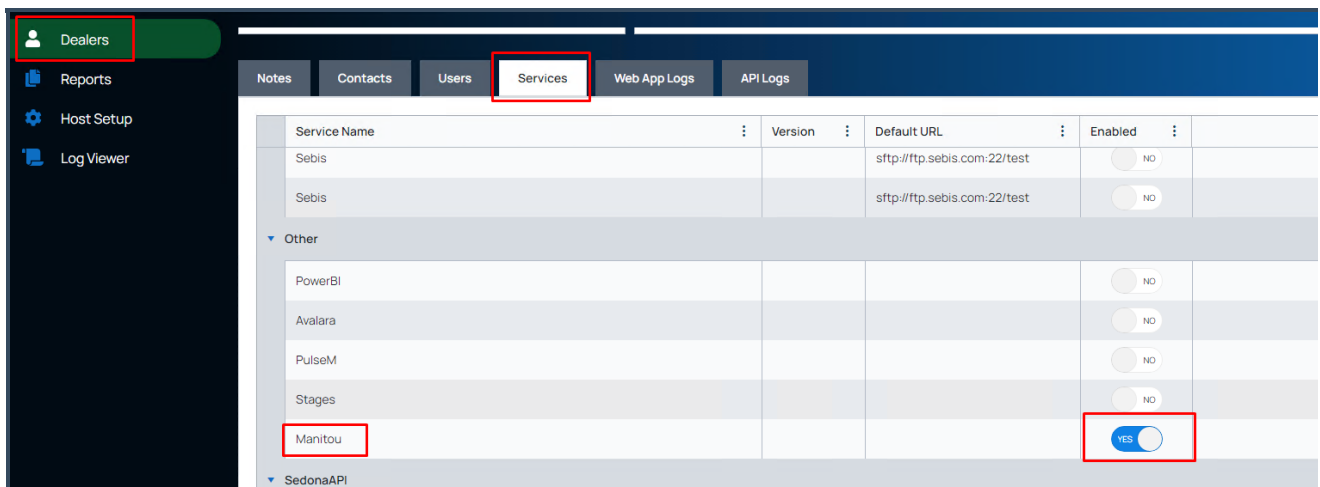
1. Click the Add
2. Type the IP address.
3. Click OK.

- Repeat until all addresses are entered.
- To complete the configuration click OK on the Bold Router Configuration

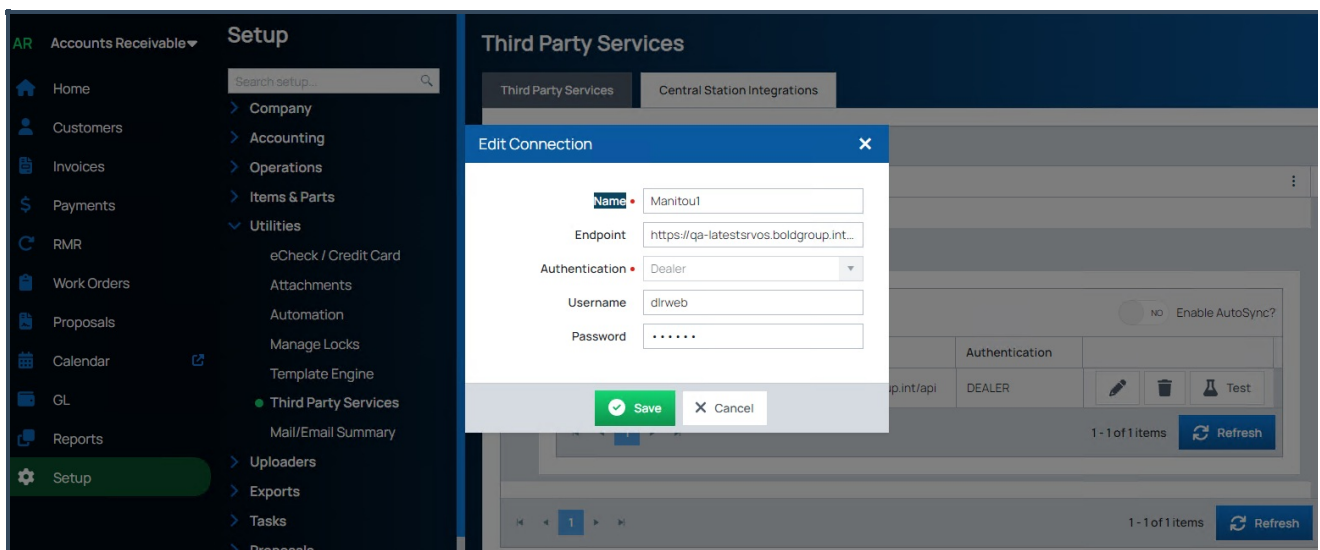
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Managely Configuration

In the Managely Host navigate to Dealers. Select the Services tab and scroll down to the "Other" section. Select to enable Manitou.

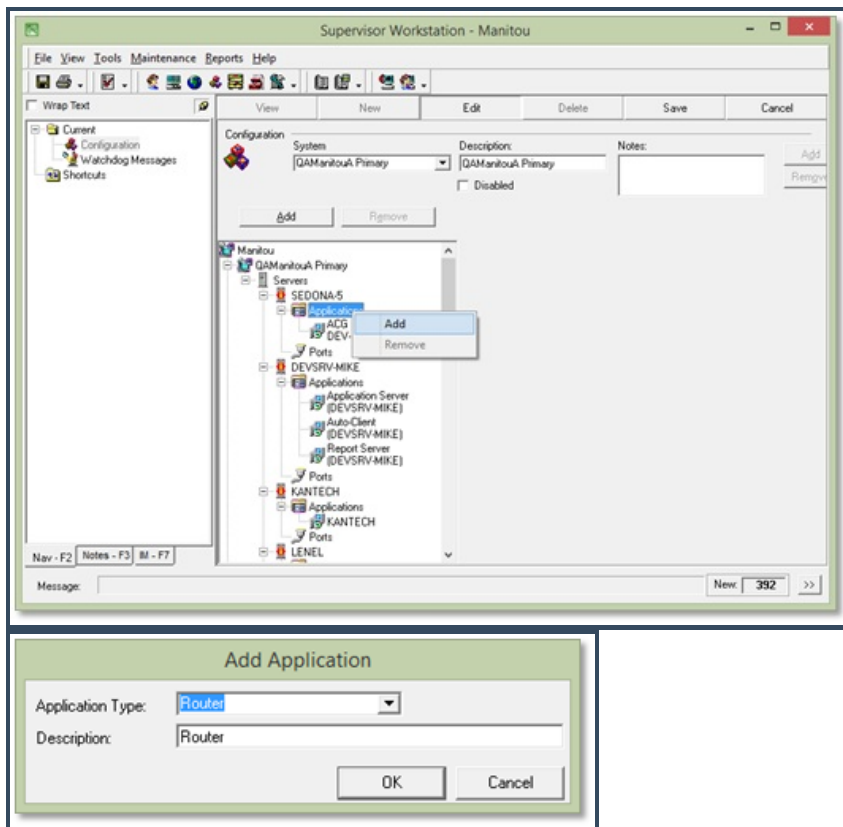


In the Managely application Navigate to Setup and expand Utilities. Select Third Party Services and select the Central Station Integrations tab. If the form is blank, click the Refresh button at the bottom. "Manitou" should load into the form. Expand Manitou and click the edit button to update the Name and Endpoint. The Username and Password need to be a valid BoldNet Web Login.

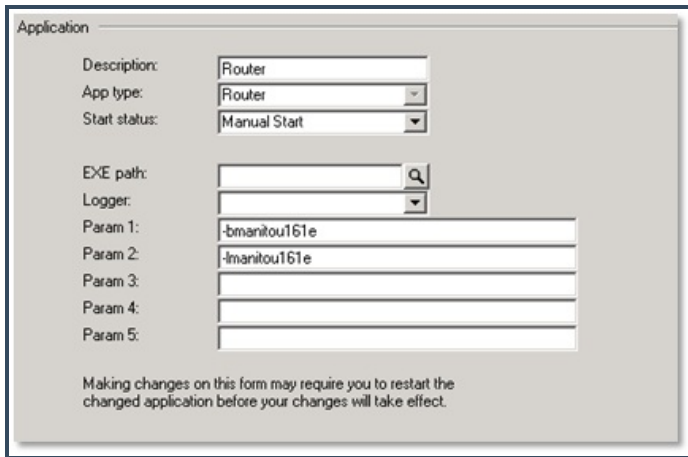


Adding the Router to the Manitou Configuration

1. Open Supervisor Workstation.
2. Go to Maintenance | Setup | Configuration.
3. Click Edit.
4. Right-click Applications under the server on which the router configuration was completed and click Add. The Add Application dialog box appears.



5. Select Router from the Application Type drop-down list box and click OK. The Application group box appears.
6. Under Application, type -b plus the BrokerServerName in the Param 1
7. Under Application, type -l plus the LoggerServerName in the Param 2
8. Click Save.
9. Repeat these steps for each additional configuration on the customer's system.



Application

Description: Router

App type: Router

Start status: Manual Start

EXE path:

Logger:

Param 1: -bmanitou161e

Param 2: -bmanitou161e

Param 3:

Param 4:

Param 5:

Making changes on this form may require you to restart the changed application before your changes will take effect.

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Starting the Router from the MSM

1. Open MSM on the active Manitou machine. If it is already open, click the Refresh
2. Right-click Router and click Start.

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Managely API calls that Manitou to Managely integration uses

customer->customer
customer->customerByCustomerNumber
customer->customersViewModels
customer->customerWizardAdd
customer->nextCustomerNumber
customer->terminateCustomer
customer->updateCustomerContact
customer->site->createCustomerSite
customer->site->customerSites
customer->site->inactivateCustomerSite
customer->site->nextCustomerSiteNumber
customer->site->updateCustomerSiteContact
customer->system->addCustomerSystem
customer->system->inactivateCustomerSystem
customer->system->updateCustomerSystem
dealer->employee->dealerEmployees
external->externalInstance->externalInstances
external->externalReference
external->externalReference->externalReferences
external->externalReference->linkExternal
external->externalReference->unlinkedSites

recurring->allRMR
setup->branch->branches
setup->defaults->dealerDefaultsWithEnumValues
setup->item->dealerInvoiceItems
setup->part->parts

customer->system->inactivateCustomerSystem
customer->system->updateCustomerSystem
dealer->employee->dealerEmployees
external->externalInstance->externalInstances
external->externalReference
external->externalReference->externalReferences
external->externalReference->linkExternal
external->externalReference->unlinkedSites
recurring->allRMR
setup->branch->branches
setup->defaults->dealerDefaultsWithEnumValues
setup->item->dealerInvoiceItems
setup->part->parts
