

Accounting Integration

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Product Catalog Info

Product Code:

SFT-ADD-ACCTINTEGRATION

Product Description:

Links databases between the Manitou and approved, integrated accounting system. Integration package includes the ability to integrate user seats - giving those users access to Manitou from the integrated product.

<https://boldgroup.lightning.force.com/lightning/r/Product2/01t6g000002jG23AAE/view>

Knowledge Base

Manitou to Managely <https://manitou-knowledge-base.knowledgeowl.com/help/manitou-to-managely-integration-entire-process>

Manitou to SedonaOffice <https://manitou-knowledge-base.knowledgeowl.com/help/manitou-linking-to-sedonaoffice-5ee89af>

Pre-Requisite Document

Manitou to Accounting Integration Checklist

<https://securityandalarminternalkb.knowledgeowl.com/help/manitou-to-accounting-integration-checklist>

Supplementary information

Cost:

(The estimated cost is given as an example. Sales will confirm for each specific customer)

The accounting Integration module is for SedonaOffice and Manitou information push and pull. The MDK runs \$367.50/month plus about \$2K in services upfront for implementation. The accounting integration module is \$78.75/month plus roughly the same in services upfront.

Is MDK required for Accounting Integration?

Both MDK and Accounting Integration add on modules are required for Manitou and SedonaOffice / Managely to communicate.

BoldNet / MDK

If the customer has BoldNet, then they already have MDK

Is there a Manitou to SedonaOffice Linker?

Yes, there is a linker tool

Is there a Manitou to Managely Linker?

No, there isn't a linker tool. Linking will need to be completed manually.

Effort and Process

On Prem

The installation takes approx. 2 hours

- 1) System Consultant to meet with the customer to capture "Integration Checklist" pre-requisite document
- 2) PM to book time with a System Consultant and the customer

Hosted

The installation takes approx. 2 hours

- 1) System Consultant to meet with the customer to capture "Integration Checklist" pre-requisite document
- 2) PM to book time with a System Consultant to complete the Integration

Questions for the Customer

Question 1 - What accounting system is in use? (e.g. Managely, SedonaOffice etc.)

Question 2 - Is the requirement to enter data in Manitou or the Accounting app? This will determine the direction. All other questions are in the "Integration Checklist" pre-requisite document

IMPORTANT - Integration with Managely can only be linked automatically using a conversion before Data Conversion. Manual linking will be required after Data Conversion.

Training

How to link from accounting is part of the standard training.
