

SWS - Forms in the Maintenance Menu - Accounting Companies

Manitou can integrate with Sedona and Quickbooks Accounting Software products. Manitou can be configured with these products so that updates in one program automatically result in the same updates in the other program.

Adding and Configuring Accounting Software Products in Manitou

Perform the following steps to add and configure Accounting Software products in Manitou:

1. Navigate to the Maintenance menu and click "Accounting Companies".
2. Click "Edit" then click "Add".

Result: The "Add Accounting Company" window displays as shown in the following screenshot:



3. Enter the Company ID into the appropriate field.
4. Open the "Interface Type:" dropdown menu.

Note: The following are available options in the "Interface Type:" dropdown menu:

- Not interfaced - There is no integration between Manitou and the Accounting Company, and the two systems will not exchange any data.
- Manitou CS to Accounting- The Accounting Company is integrated with Manitou and the software is updated in the following direction: Manitou to Accounting (i.e., changes made in Manitou result in the same changes made to the Accounting Software)
- Accounting to Manitou CS - The Accounting Company is integrated with Manitou and the Accounting Software is updated in the following direction: Manitou to Accounting (i.e., changes made in the Accounting Software result in the same changes made in Manitou)
- Read only - Changes made in either Manitou or the Accounting Software do not affect the other program (although the Accounting Software can read information from the Manitou database)

5. Select an Interface Type from the "Interface Type:" dropdown menu.

Result: If you select either the "Manitou CS to Accounting" or the "Accounting to Manitou CS" options, the "Application:" field displays as shown in the following screenshot:

6. Select the Accounting Company from the "Name:" dropdown menu.

Result: If the Accounting Company you want to add does not display in the "Name:" field after you select an Application, Manitou has not been configured for integration with the product and the Accounting Company cannot be added.

7. Click "OK".

Result: The system returns you to the "Accounting Company" form and displays the Accounting Company you added as the currently selected item as shown in the following screenshot:

8. Enter the DSN number into the "DSN" field.

Note: DSN is an acronym for Data Source Number.

9. Enter the username the system will require to access Accounting Company information into the "User:" field.
10. Enter the password the system will require to access Accounting Company information into the "Password:" field.
11. Enter the Server on which the Accounting Company software resides into the "Server" field.
12. If you want, select the "Update common fields" option.

13. If you want, select the "Account ID required" option.

Note: Selecting this option results in the user being prompted for credentials when attempting to log in.

14. If you want, select the "Force Account ID to be unique" option.

Note: Selecting this option results in the system ensuring that entries in the "Name:" and "Password:" field are unlike those of any other user.

15. If you want, select the "Force services to be one-to-one with recurring" option.

16. If you want, select the "Push Customer Changes" option.

17. Click "Save".
