

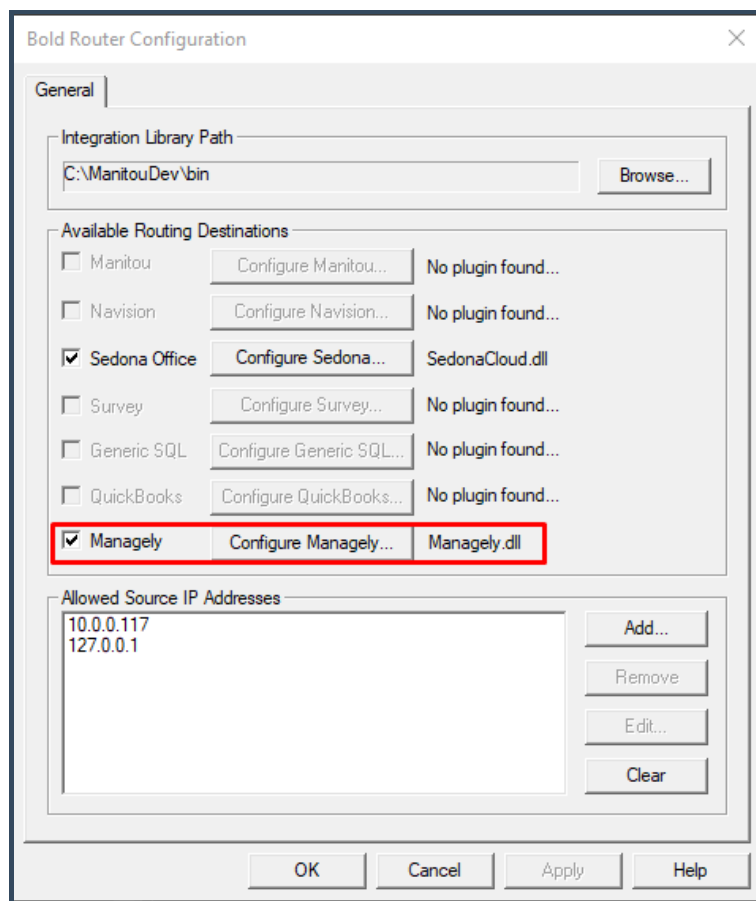
# Manitou to Managely Integration (entire process)

- Router Configuration
- Options common to both installations
- Managely Configuration
- Adding the Router to the Manitou Configuration
- Starting the Router from the MSM
- Creating an Accounting Company
- Defining Billable Charges
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- Common Fields
- Entering a new customer
- Systems
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**NOTE: Creating an Accounting Company** needs to be completed prior to Router Configuration.

## 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	<input checked="" type="checkbox"/>
✎					<input type="checkbox"/>

Customer Create Sales Person Name

McSalesperson, Salesperson

☒ 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 'Salesperson, Manitou' entry is highlighted with a red box. The 'Technician' and 'Salesperson' columns for this entry are also highlighted with red boxes, showing 'NO' and 'YES' respectively.

Image	Name	User	Email	Technician	Salesperson	
	Goes Here, Your Name		youremail@xxxx...	NO	NO	Edit Delete 0 Docs
	Toro, Bill		papayt@gmail.com	YES	NO	Edit Delete 0 Docs
	Salesperson, Manitou		travis@alarmbil...	YES	YES	Edit Delete 0 Docs
	Godby, Paul		noemail@onexcel...	NO	NO	Edit Delete 0 Docs
	Silvia, Jacob		jacobs@perennial...	YES	NO	Edit Delete 0 Docs
	Marks, Michael		mkmmarks@me.com	YES	YES	Edit Delete 0 Docs
	Marks, Luke	customeruser (Smith, John)	mkmmarks@me.com	YES	YES	Edit Delete 0 Docs
	DeBaggio, Justin		justin.debaggio@...	YES	YES	Edit Delete 0 Docs

**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 displays the BOLD GROUP software interface. On the left, a navigation menu is visible with the 'Setup' option highlighted in green. The main content area is titled 'System Defaults' and contains two columns of configuration options. The left column includes fields for '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 includes 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:

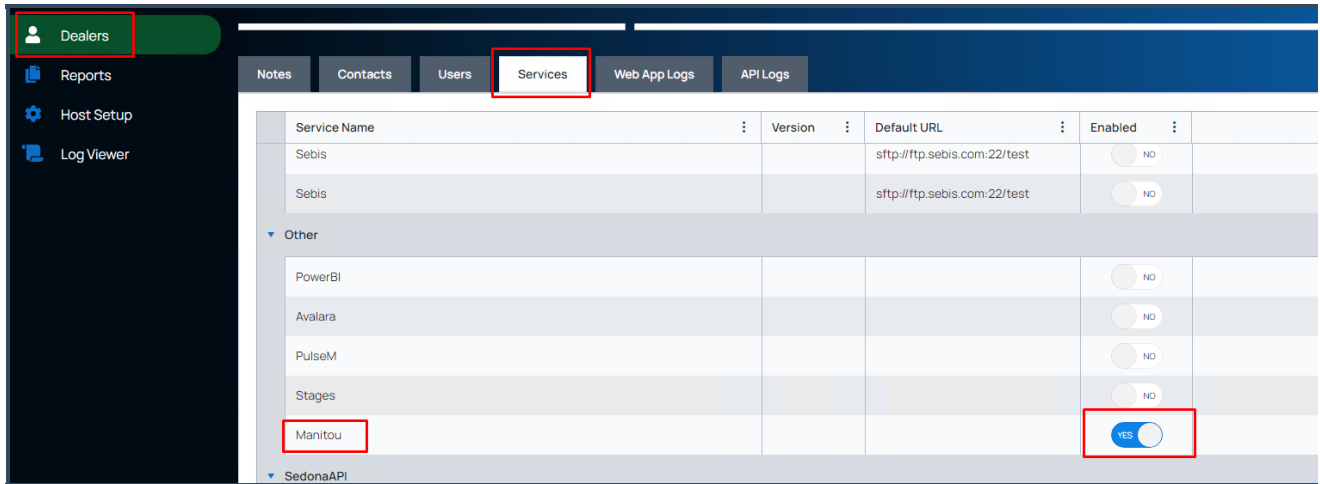
1. Click the Add
2. Type the IP address.
3. Click OK.

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

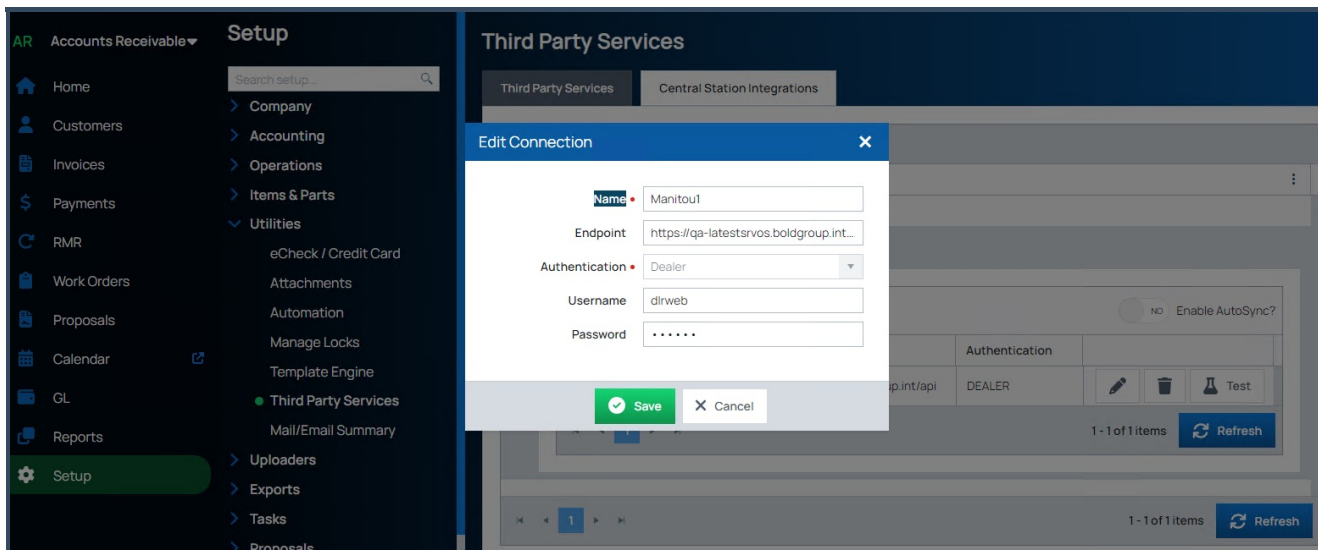
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# Managely Configuration

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



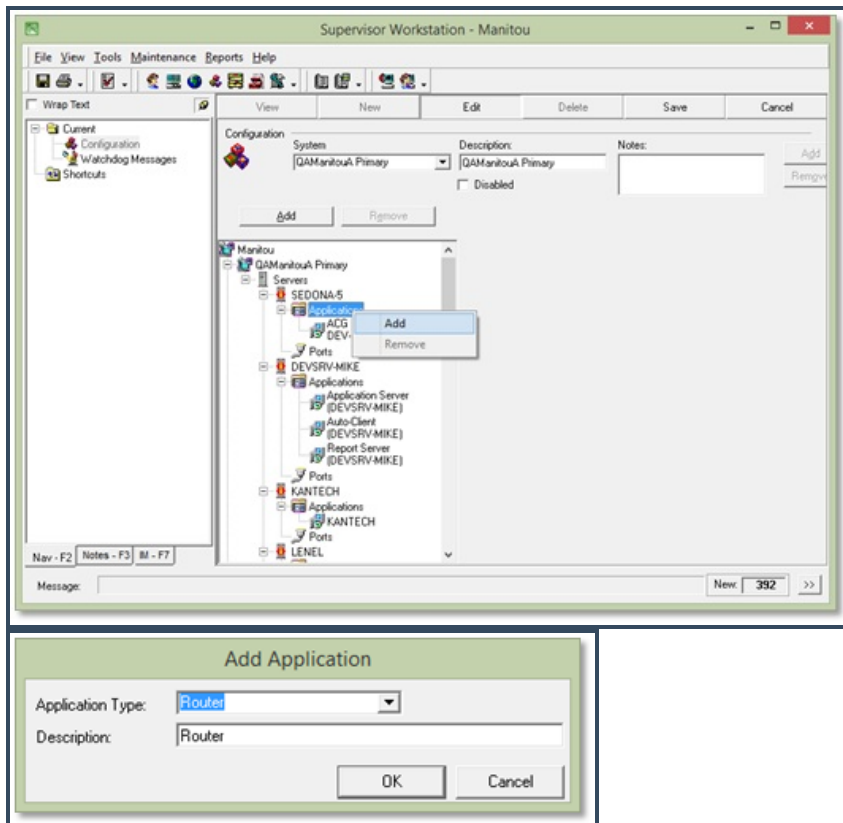
In the Managely application Navigate to Setup and expand Utilities. Select Third Party Services and select the Central Station Integrations tab. If the form is blank, click the Refresh button at the bottom. "Manitou" should load into the form. Expand Manitou and click the edit button to update the Name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



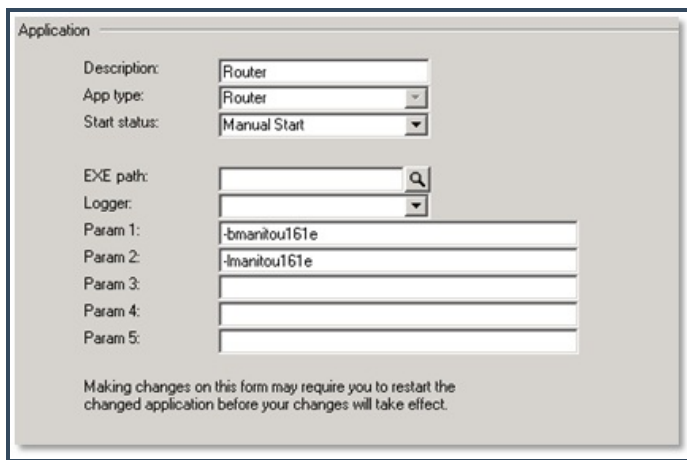
## Adding the Router to the Manitou

# 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.

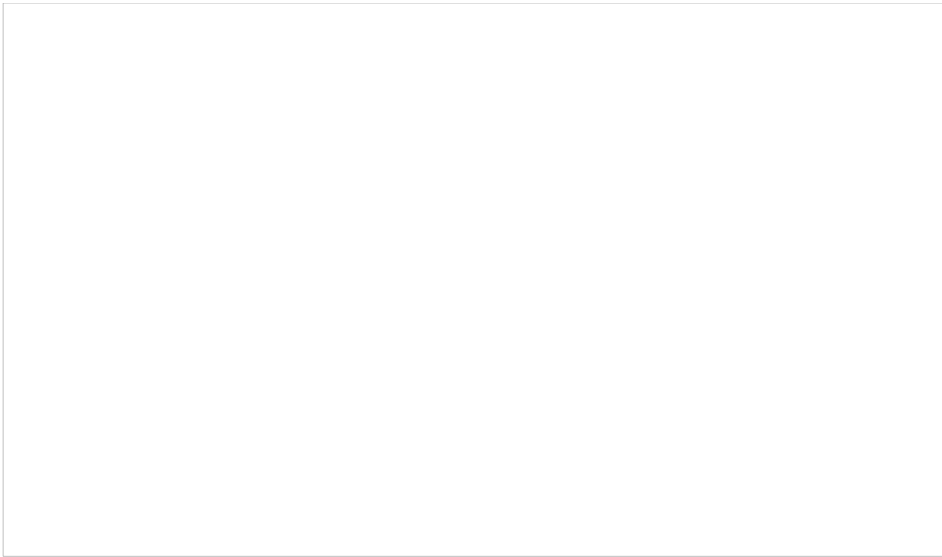
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The below are steps the customer will do.

## Creating an Accounting Company

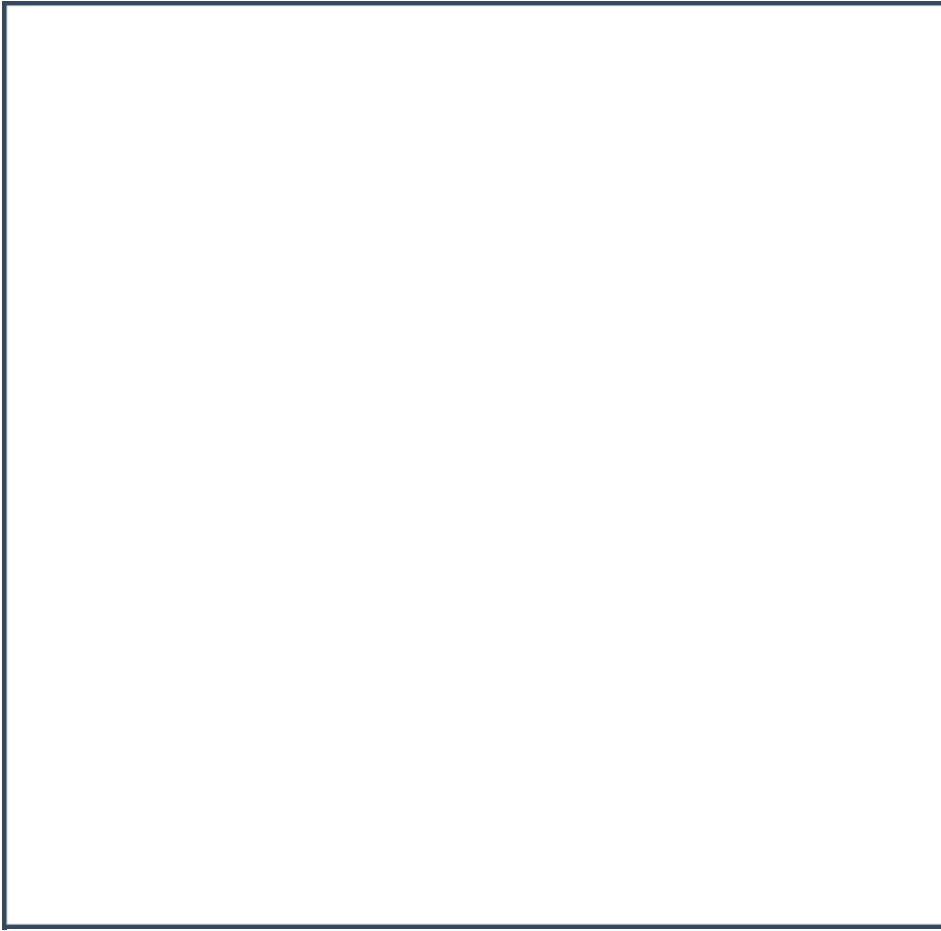
An Accounting Company first needs to be entered into the Supervisor Workstation to be used when configuring the Router setup.

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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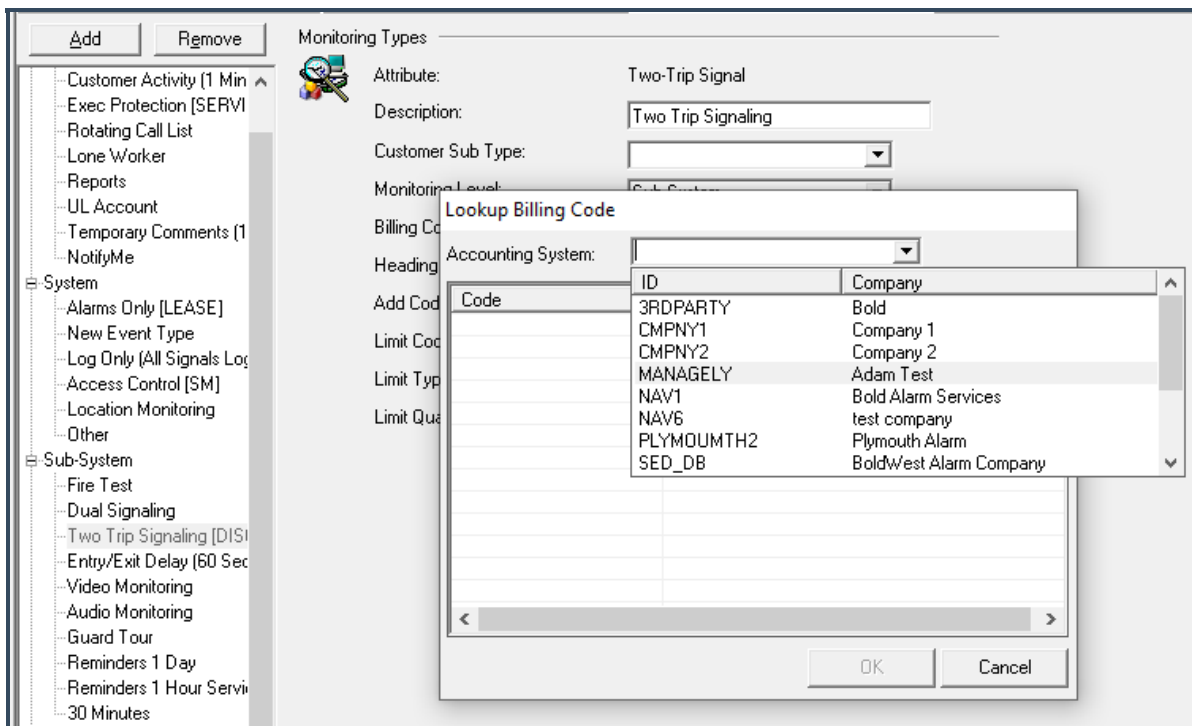
## Defining Billable Charges

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.

Attribute:	Two-Trip Signal
Description:	Two Trip Signaling
Customer Sub Type:	
Monitoring Level:	Sub-System
Billing Code:	DISCOUNT (NO TAX)
Heading Code:	
Add Code:	
Limit Code:	
Limit Type:	
Limit Quantity:	0

**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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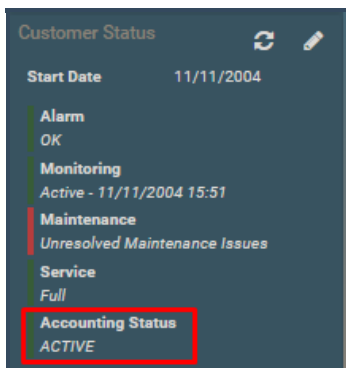
## Dealer Billing/Third Party Billing

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	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.

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# 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

CANCEL

NEXT

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

CREATE

☐ 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

<

>

>>

CANCEL

DONE

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.

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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:

**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

CANCEL DONE

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:

**Edit System**  
1 - Event System

System Type  
☐ Event Monitoring  
☐ Access Control  
☐ GPS Tracking  
☐ Other

System Number  
1

Description  
Event System

Accounting ID      Accounting Description      🔍      🔄

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

CANCEL      DONE

The lookup dialog is displayed:

**Accounting Systems**

RELOAD

🔍

System	Description	Panel Type	Status	Other
13344	PNL B		Active	

Rows: 10 ▼ 1-1 of 1

CANCEL      DONE

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

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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

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