Managely Release Notes

December 2022

Contents

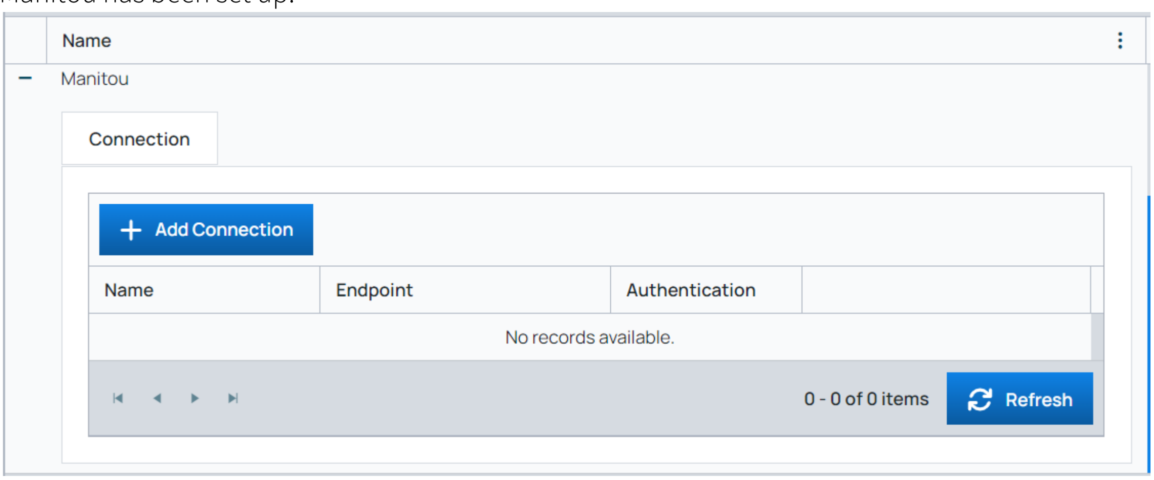
Enhancements

Managely Integration with Manitou

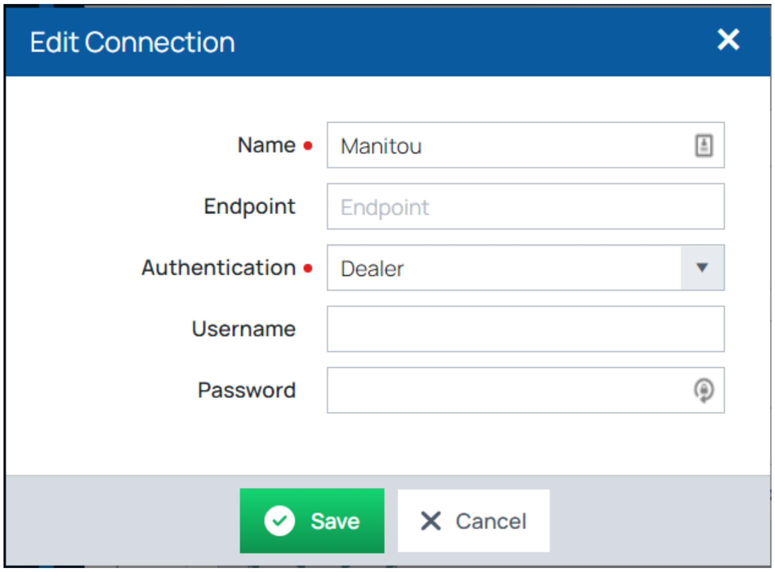
Managely can now integrate with Manitou. This integration allows Managely to push data to Manitou and allows Manitou to push data to Managely.

Set Up the Third-Party Integration

1. Navigate to Setup > Utilities > Third Party Services.
2. Click the Central Station Integration. This shows the central station integrations that can be set up.
3. Click the + beside Manitou. This shows a Connection tab that will be blank if no connection to Manitou has been set up.



4. Click +Add Connection.



5. On the Edit Connection screen, complete the fields:
   - Name: This defaults to Manitou.
   - Endpoint:
   - Authentication: This defaults to Dealer; choices are Dealer, Host, and User.
   - Username:
   - Password:
6. Click Save.

This completes the integration setup.

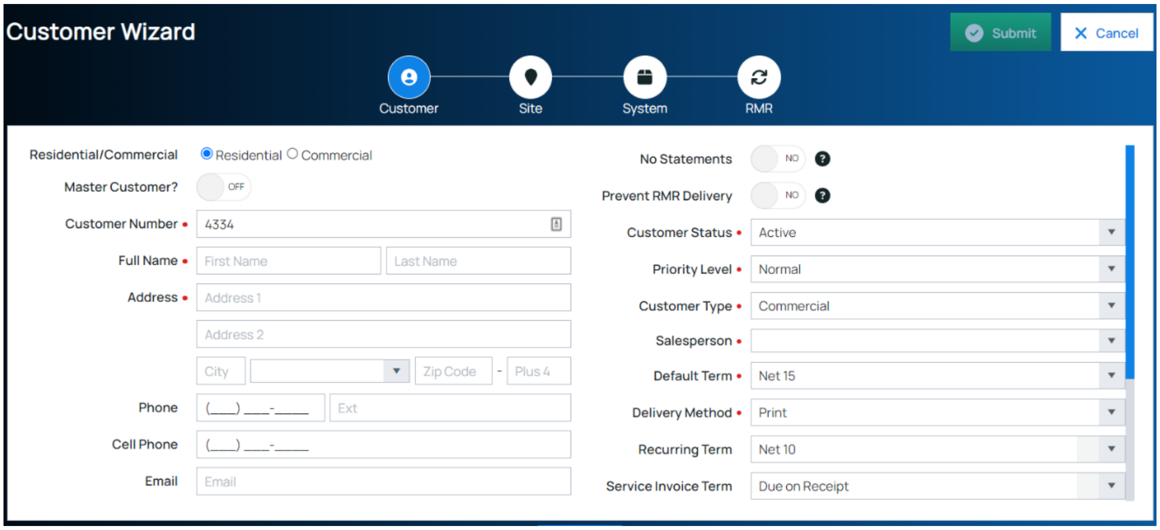
Set Up Customer, Site, System Integration

This integration allows users to push data from Managely to Manitou and to push data from Manitou to Managely.

1. Open the Customer Wizard (Customers > +Add Customer).

Customer

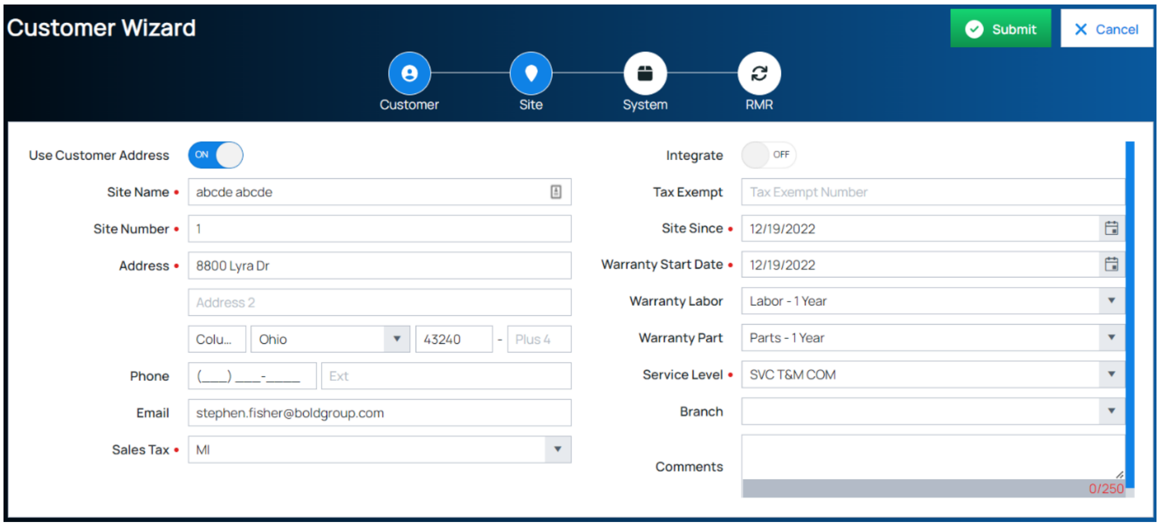
2. At a minimum, complete the required fields for the Customer.



3. Click Next.

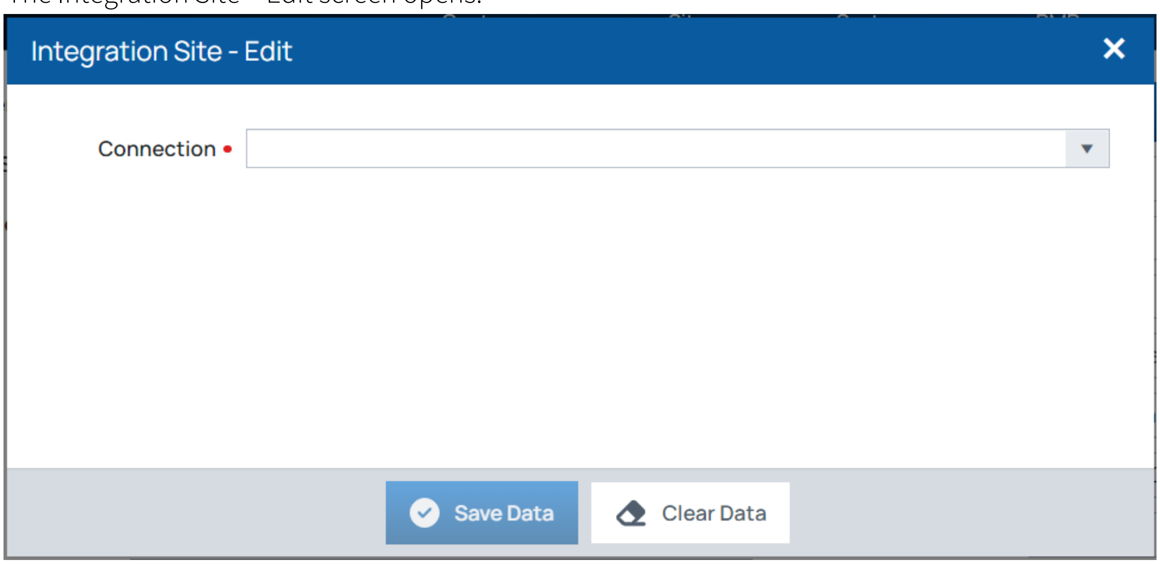
Site

4. At a minimum, complete the required fields for the Site.



5. Click the Integrate switch from Off to On.

The Integration Site – Edit screen opens.



6. In the Connection field, select the Manitou connect set up earlier. This comes from Setup > Utilities > Third Party Services > Manitou > Connection tab.
7. This shows the Manitou Dealer field. Select a Manitou dealer.
8. Choose the Integration Type:
   - Link Existing Manitou Customer
   - Push New Manitou Customer

The screen shows different fields based on your choice.

9. Link Existing Manitou Customer: This shows the customer from the customer wizard in the Managely Integration Entities. Under External Integration Entities, the External Sites list shows all customers for the selected Manitou Dealer. Choose a customer to link.
   - Push New Manitou Customer: This option changes the fields on the screen.
   - Customer Type: choose one
   - Customer ID: Type one
   - Customer Name: This comes from the Managely customer wizard
   - Timezone: Select one from the list
   - Country: Select one from the list
   - Address: This comes from the Managely customer wizard
   - Dealer: Select one from the list
   - Locale: Select one from the list
   - Branch: Select one from the list
   - Fire Authority: Select one from the list
   - Police Authority: Select one from the list
   - Medical Authority: Select one from the list
   - Cross Street: Type one, if needed
   - Subdivision: Type one, if needed
10. Use the Contact List tab and the Contact Points tab to create these for Manitou. Pushing data to Manitou adds the Contact List and Contact Points to Manitou.
11. When finished, click Save Data, and return to the customer wizard in Managely.
12. After saving the data, if needed, click Edit Integration Data button (beside the Integrate switch) to change the Manitou data. If you want to reset the integration, click the Clear Data button.
13. On the Customer Wizard, click Next to advance to System.

<u>System</u>

If you integrated at the site level, then it is possible to integrate at the system level. If you did not integrate at the site level, you cannot integrate at the system level.

14. At a minimum, complete the required fields for the System.
15. To integrate a system, click the Edit Integration System button. The Integration System – Edit screen opens.
   - Connection: Manitou is pre-selected
   - Integration Type: One of these is pre-selected based on the Site choices
   - Unique System Number: Type one
   - Description: Type one
   - Panel Type: Select one from the list
16. To add an area, click the Area tab, and click the +Add Area button.

- Area ID: Type the hexadecimal area ID (Manitou needs this)
- Description: Type one

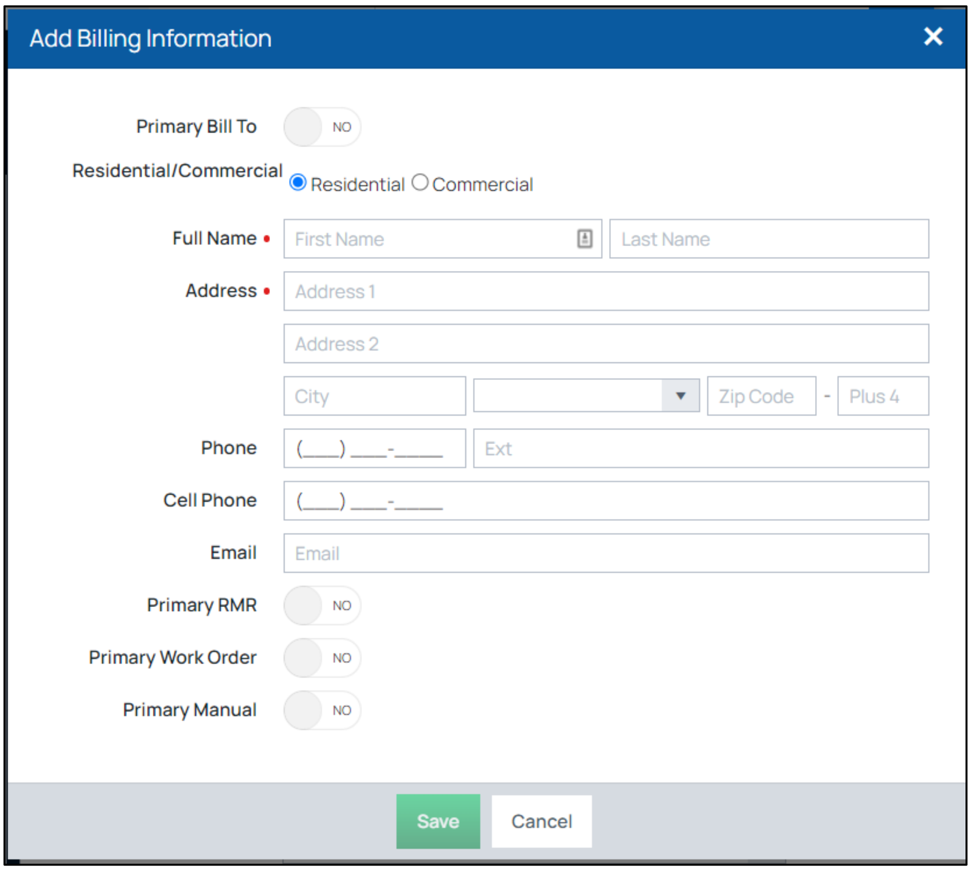
17. To add a zone, click the Zone tab, and click the +Add Zone button.
18. When finished, click Save Data, and return to the customer wizard in Managely.
19. To make any changes, click the Edit Integration System button.
20. On the Customer Wizard, if needed, click Next to advance to RMR.
21. When finished with the customer wizard, click Submit.
22. The customer shows a Manitou tab. On the Manitou tab, add contact lists and contact points.
23. On the customer System tab, there is a Manitou tab. At the system level, on the Manitou tab, add areas and zones.
24. On the customer System tab, Manitou tab, there is an Activate Text Mode button. Click this to put this system on test. This opens the Edit On Test screen.
    - Description: Type one
    - Date From: This is required
    - Date To: This is required
25. Click Activate to start the test, which ends when the Date To is reached.
26. To end the test early, click the Disable Test Mode button. At the prompt, click Disable.

Automatically Synchronizing Data with Manitou

1. Navigate to Setup > Utilities > Third Party Services > Central Station Integration tab > Connection tab. There is an Enable AutoSync switch. (By default, this is off.)
    2. Turn the Enable AutoSync switch to On. If users make changes in Managely to Manitou sites and systems, the Enable AutoSync keeps the changes synchronized with Manitou.

Add Bill-To Button to Screens Where Bill-To can be Selected

Some Managely pages now have an option to add a “bill to” to customers from anywhere users would select a “bill-to” to associate with an entity. This is a + button beside the bill-to list on add and edit pages:



This is on these screens:

- RMR Edit
- Invoices/Credits
- Work Orders
- Customer RMR Add

Application Corrections

Resolved Issues
Proposal Follow up Appointment implementation Resolved this issue by implementing proposal appointments and adding Customer and Salesperson dropdown fields.
Redirect Users After Processing RMR Invoices Resolved this so that users are redirected back to the previous screen when the job starts processing.
Sites with large amounts of parts seeing a delay loading Resolved this issue by not including site parts, which are not needed in the site parts search.
Account Payments not working Resolved an issue that happened when making a payment directly to an account where Forte was not submitting the payment.