Intro

For property management companies and self-managed associations that use Sage for accounting, uManage offers convenient account integration. Download and install the uManage integration application and populate uManage with unit owner and address information, as well as ledger histories. This powerful integration eliminates the need for redundant manual data entry. Account data can also be displayed to homeowners upon login to the eUnify association web portal, keeping everyone up-to-date on their assessments.

Integration Setup

System Recommendations:

1. Operating system should be Windows 7 or newer, with a minimum of 6GB RAM and 10GB of free disk space, and two processor cores. The application will run on machines with lesser specs but the integration process may be slower depending on the size of the Sage company files.
2. The computer must be on (not in sleep mode), and connected to the internet in order for nightly integration to run automatically. The sync with eUnify servers typically runs in early morning hours, around 2:00 AM Central.
3. The integration app must be installed on a computer that has Sage installed. If running Sage in a server environment, the company files can be on a server but the integration app requires a local version of Sage to be installed.

Installation:

1. Download the eUnify integration setup file from http://www.eunify.net/download
2. Right-click the "Setup" application file and select to "Run as Administrator".
3. Click "Next" on the initial screen of the install wizard popup window.
4. Click "Next" again, or designate an alternate folder destination for the application with the "Change…" button and then click "Next" to proceed.
5. Click "Install" on the next screen of the popup window to confirm installation.

Installation may take a few minutes from this point, and a status bar indicates the progress of the install wizard. Once the installation is complete, click the "Finish" button, and the application is ready for use.

Note: Please make sure that the computer housing Sage and the integration application does not go into "sleep" or "standby" mode overnight, as this will prevent the account synchronization from running automatically.

Data in Sage

Contacts:

In Sage, there is always a default "bill-to" contact, and optionally designated "default ship-to" contact if the customer mailing and unit/billing addresses differ.

uManage takes only the designated "ship to" and "bill to" contacts from Sage. If only a "bill-to" contact exists, then uManage uses that address as the property unit address and the default owner mailing address as well. If

there is a different "ship-to" off-site address for the unit owner, please ensure that the address is assigned to a contact in Sage, and that the contact is set to be the "default ship-to contact for this customer" (as in screenshot (a) below).

In uManage, on the Setup Association > Manage Mgmt Co page, there is a setting in the "Accounting Integration" section, called "Address Identification", which allows you to designate the unit address to be determined by either the "Ship-to" or "Bill-to" address from Sage. This setting should be decided prior to initial integration and maintained as a standard for all integrated customer accounts (see screenshot (b) below).

Screenshot (a):
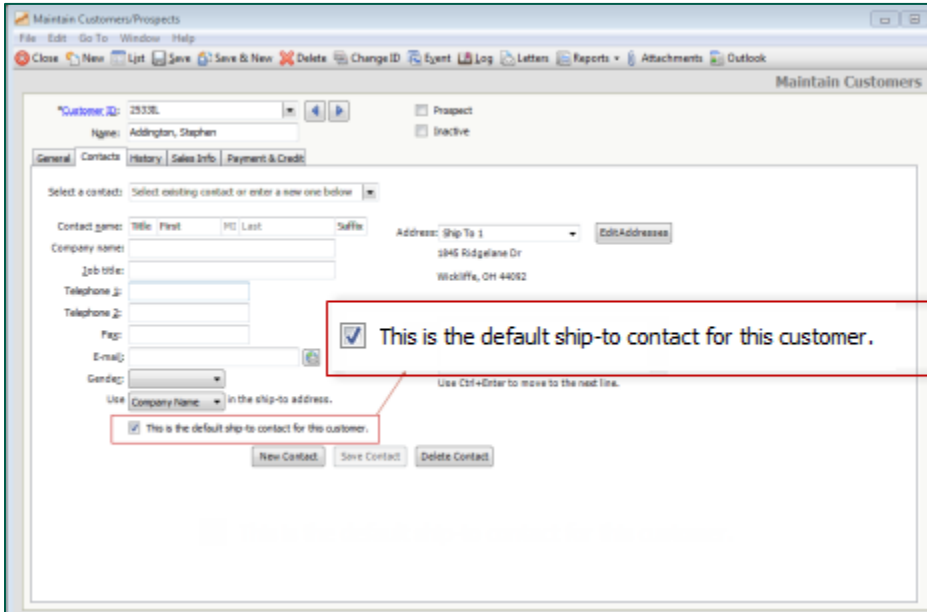
Note: For each customer in Sage, there will need to be one contact assigned as the "Billing" address, and one contact set as the "default ship-to contact". This point of setup is critical in order for the integration to function properly.

Select whether the unit address that populates into uManage is determined by either the "Bill-to" or "Ship-to" address in Sage on the Setup Association > Manage Mgmt Co page, Accounting Integration section.

Screenshot (b):
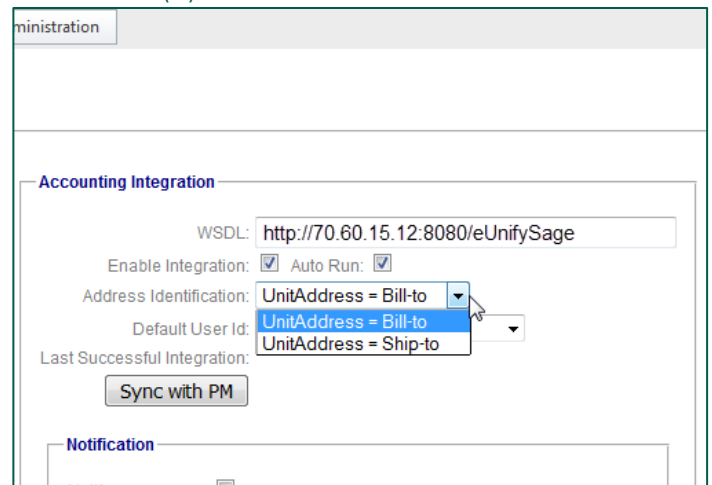
# Linking Company Files to uManage

Run the installed Sage integration application.

Note: You must have administrator access in Sage. Sage will need to open and logged in with administrator credentials when confirming company file access.

A few easy steps outlined below will complete setup and synchronize your company, customer, and transaction data in Sage with uManage units, accounts, and account ledgers.

1. Application Settings:

(a) Click on the "File" menu and select "Setup".
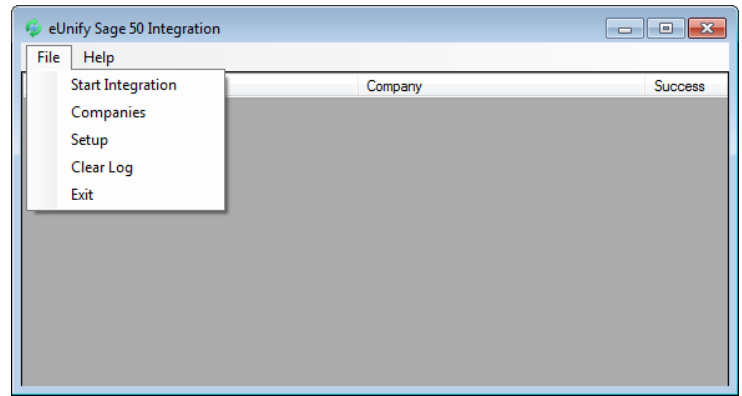
(b) In the resulting "Settings" popup window, enter the Firm ID, Authentication Code, and specify a time for the automated integration to start. Note that the computer must be on at this time and not in sleep mode.
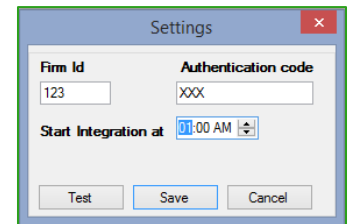

Note: Both the Firm ID and Authentication Code are found on the Setup Association > Manage Mgmt Co page.


2. Company Files:

(a) Click on the "File" menu and select "Companies". In the resulting window, click on the "Update from Sage 50" button to update the list of available company files for integration. Company files need only be linked once, so clicking this button displays only company files which have not yet been integrated with uManage.
Check the "Enabled" box next to the company name in the list and then click the "Request Access" button to initiate the link between the integration application and Sage.
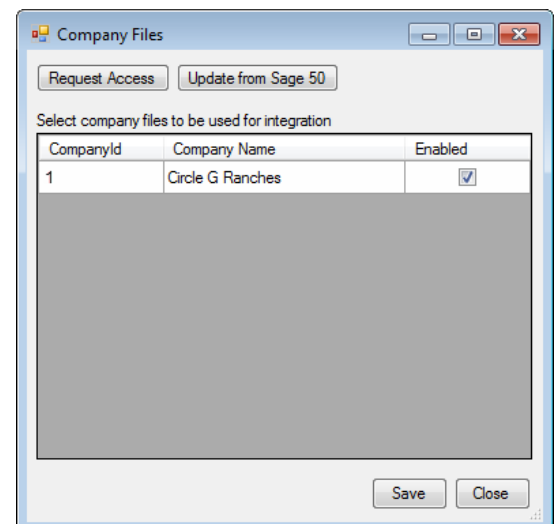

(b) After clicking the "Request Access" button for a company file, open Sage. Approve access in the popup "Third Party Application Access" window, which opens automatically upon login, after the request for integration access has been made.

Select the "Always allow access" option and click "OK".
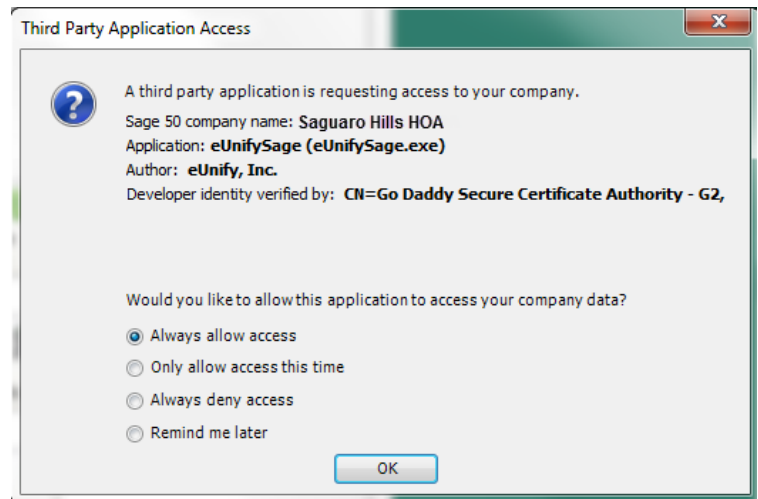
3. Start Integration:

(a) Click on the "File" menu and select "Start Integration". This initiates the integration, passing association (company) and account (customer) information from Sage to eUnify. Initiating integration calls a number of methods, identified as, "GetCompany", "GetCustomer", and "GetTransactions"; each of these methods should display a "True" value to confirm that the data was passed to eUnify.
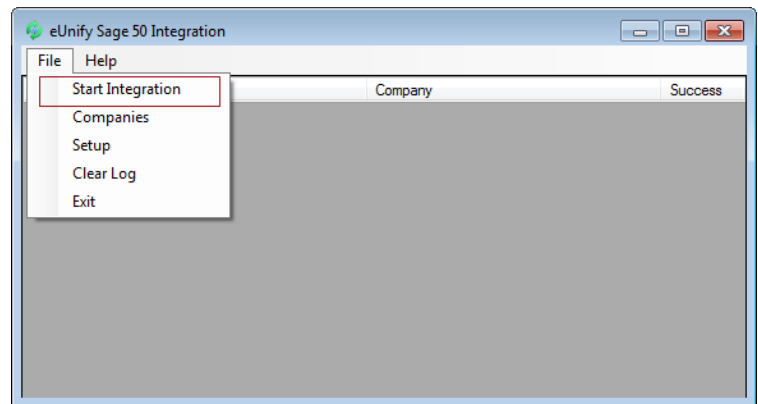
(b) If any of the methods for a company file display "Error", integration for that particular method failed and integration should be attempted again. Contact support@eunify.net to help troubleshoot.

Automatic + Manual Synchronization

Automatic Synchronization:

If the machine is on at the time specified in the 'Start Integration at' field, the application will attempt to integrate with the eUnify servers. This is the preferred method as it does not require any intervention once it is set up. The integration is fully automated.

Note: Please make sure that the computer housing Sage and the integration application does not go into "sleep" or "standby" mode overnight, as this will prevent the account synchronization from running automatically.

Manual Synchronization:

Integration may be initiated manually at any time using the "Start Integration" option under the "File" menu in the integration application. This is helpful if you post payments or transactions during the day and you want this information to be immediately available on the portals.