

## ConnectWise Preflight Migration - Accounts not linking

<https://campus.barracuda.com/doc/93197025/>

### Summary

Add the ability to link an ECHO account to a ConnectWise Company when the **Company ID** Field is already in use.

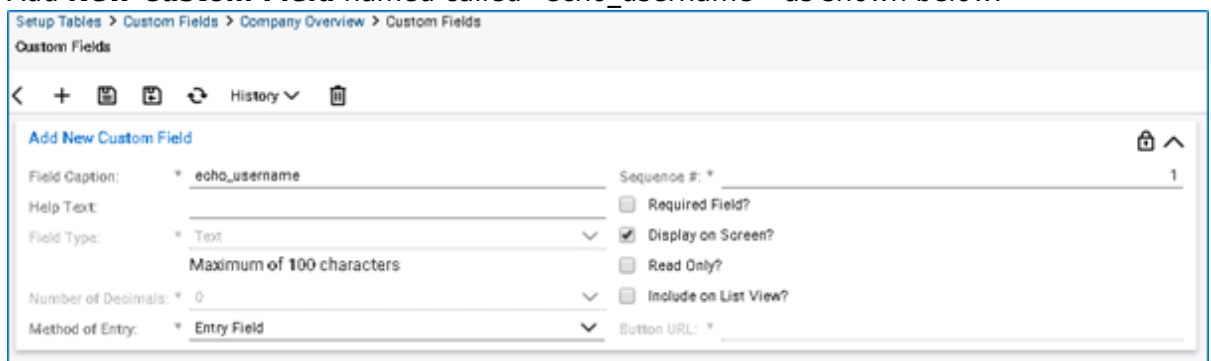
### Details

A partner may encounter a conflict linking an ECHO account to a ConnectWise Company when the **Company ID** Field is already in use for an existing 3rd party integration.

Workaround: Partners affected with a ConnectWise **Company ID** conflict must add a custom field in the **Company Overview** by performing the following steps.

#### 1. Add new Custom Field

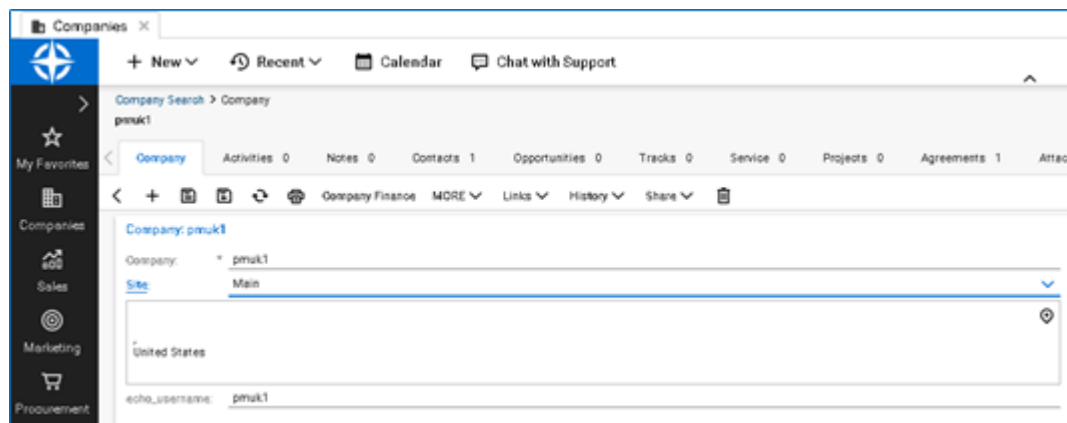
- In the **ConnectWise Manage Portal** go to **System > Setup Tables > Custom Fields > Company Overview**
- Add **New Custom Field** named called "echo\_username " as shown below:



- Click **Save**.

#### 2. Add Echo Username to the newly created Custom Field

- In the **ConnectWise Manage Portal** go to **Company > Company Search > Company**
- In the section called "echo\_username" enter the ECHO account username as shown below:



## Notes

- The ECHO account username entered in the "echo\_username" Custom Field must be identical to the ECHO account username.
- The ECHO account username must be unique across each company in order for an ECHO account to link with a ConnectWise Company.

## Figures

1. clipboard\_e9864f60be2aef2c6ae92d75f21e8468e.png
2. clipboard\_e8d5b7b10bd7a8b60d76da40bd0cdcfa6.png

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