

Initial Setup

<https://campus.barracuda.com/doc/96025462/>

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- [Task 7. Adding Custom Fields to Link ECHOplatform Accounts to ConnectWise Companies](#)
- [Task 8. Entering ConnectWise Credentials in ECHOplatform](#)

Task Overview

Prerequisite: Partners with an on-premise ConnectWise deployment must use the most current ConnectWise version.

For a successful integration you need to perform the following tasks in ConnectWise:

- Create the Security role
- Create an API member
- Create Client ID and Client Secret API keys
- Create a Management Solution
- Create an Agreement Type
- Add Custom Fields to Link ECHOplatform Accounts to ConnectWise Companies
- Create Agreements for ConnectWise Companies

Then, you need to perform the following tasks in ECHOplatform:

- Enter ConnectWise Credentials
- Map accounts, tickets and billing

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