

Task 6. Creating Agreements for ConnectWise Companies

<https://campus.barracuda.com/doc/96025476/>

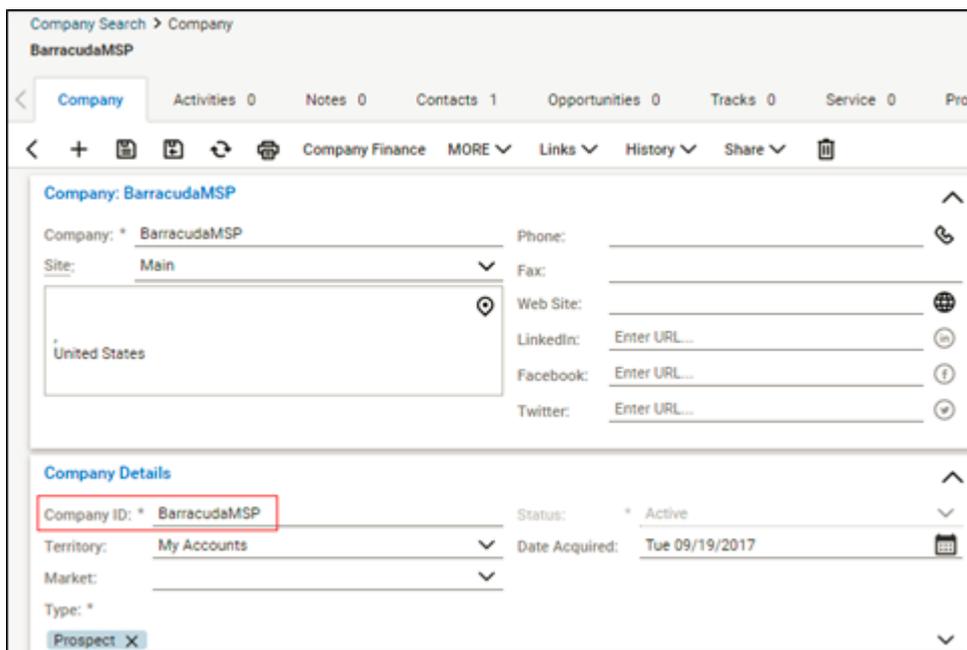
To successfully link BarracudaMSP accounts with ConnectWise companies and ensure billing information is correctly populated, an Agreement must be created for each company.

To create agreements for ConnectWise companies, perform the following steps.

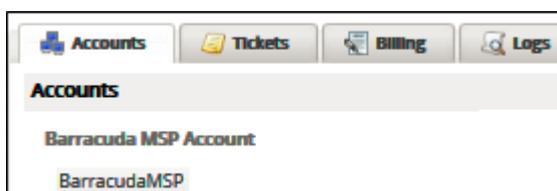
1. At the navigation menu, select **Companies, Companies**.
The Company search page is displayed.



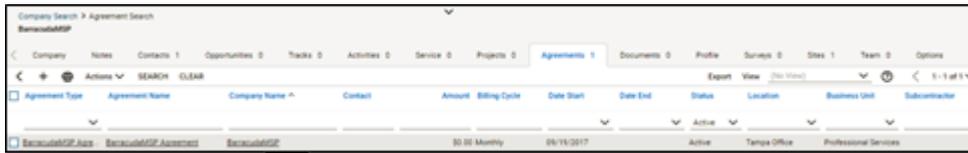
2. At the Company Name field, type the company name.
The Company profile is displayed.



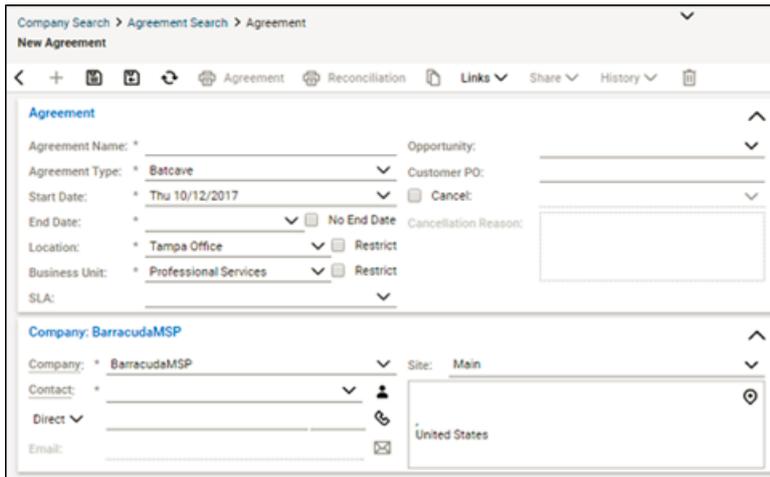
Note: Ensure that the Company ID field (in the above example, it is *BarracudaMSP*) matches the Barracuda MSP Account name you use in ECHOplatform, as shown in the example below. This page links ConnectWise companies to ECHOplatform accounts.



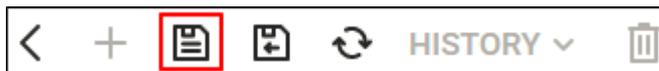
3. Click the **Agreements** tab.
The Agreement fields are displayed.



- Click the New Item  icon.
The New Agreement page is displayed.



- Provide the following information:
 - Agreement Name: Type an agreement name.
 - Agreement Type drop-down: Select the agreement type created in ConnectWise.
 - End Date drop-down: Choose an end date or select **No Ending Date** checkbox.
- Click the Save icon, as shown below.



Go to [Task 7. Adding Custom Fields to Link ECHOplatform Accounts to ConnectWise Companies.](#)

Figures

1. image2022-1-5 12:37:54.png
2. image2022-1-5 12:38:26.png
3. image2022-1-5 12:39:15.png
4. image2022-1-5 12:40:15.png
5. image2022-1-5 12:40:42.png
6. image2022-1-5 12:41:13.png
7. image2022-1-5 12:42:35.png

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