

Creating Products in ConnectWise

<https://campus.barracuda.com/doc/96025773/>

The billing integration updates a ConnectWise company's agreement by adjusting Products on that agreement. For each agreement, multiple products are used. One for each for the following:

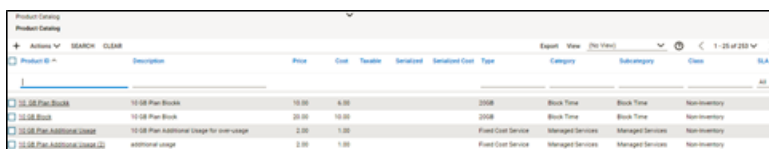
- Usage
- Local backup subscriptions
- QuickSpin host licenses
- Imaging licenses
- Hyper-V host licenses

In the ECHOplatform portal, you can map all plans or any individual plan to a level, which is then mapped to products in the Managed Devices Integration table's cross-references. However, if you do not have any products created in ConnectWise for use with online backup, you need to create them.


Creating Products in ConnectWise

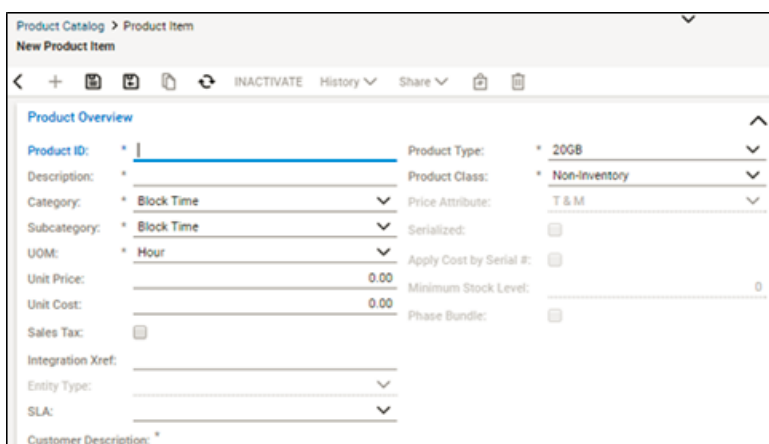
To create products in ConnectWise, perform the following steps.

1. Log into ConnectWise and select **Procurement, Product Catalog** at the navigation menu. The Product Catalog page is displayed.



Product ID	Description	Price	Cost	Taxable	Serialized	Serialized Cost	Type	Category	Subcategory	Class	SLA
10-08-Plan-Block	10-08 Plan Block	10.00	6.00				200B	Block Time	Block Time	Non-Inventory	
10-08-Plan-Block	10-08 Plan Block	20.00	10.00				200B	Block Time	Block Time	Non-Inventory	
10-08-Plan-Additional-Usage	10-08 Plan Additional Usage for user usage	2.00	1.00				Fixed Cost Service	Managed Services	Managed Services	Non-Inventory	
10-08-Plan-Additional-Usage	Additional usage	2.00	1.00				Fixed Cost Service	Managed Services	Managed Services	Non-Inventory	

2. Click the New Item  icon. The new Product Item form is displayed.



Product Catalog > Product Item

New Product Item

Product Overview

Product ID: * Product Type: * 200B

Description: * Product Class: * Non-Inventory

Category: * Block Time Price Attribute: T & M

Subcategory: * Block Time Serialized: ☐

UOM: * Hour Apply Cost by Serial #: ☐

Unit Price: 0.00 Minimum Stock Level: 0

Unit Cost: 0.00 Phase Bundle: ☐

Sales Tax: ☐

Integration Xref:

Entity Type:

SLA:

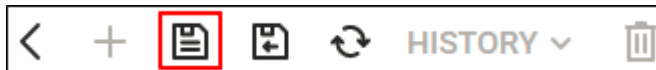
Customer Description: *

3. Choose a unique Product ID.

4. Type a brief product description.
5. Choose a category/subcategory of Managed Services/Managed Services.
6. Choose a product type of Fixed Cost Service.
7. Choose a product class of Non-Inventory.
8. Choose a Unit of Measure of Month.

- When creating a usage product, make sure that the Unit Price is equal to the amount you would like to charge per GB of backup storage.
- When creating a local backup, QuickSpin host licenses, Hyper-V host licenses, or Imaging licenses product, make sure that the Unit Price is equal to the amount you would like to charge per local backup subscription.

9. Type a brief customer description.
10. Click the Save icon, as shown below.



Figures

1. image2022-1-11 15:15:52.png
2. image2022-1-11 15:16:40.png
3. image2022-1-11 15:19:26.png
4. image2022-1-11 15:20:1.png

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