

Adding Custom Fields to Link ECHOplatform Accounts to ConnectWise Companies

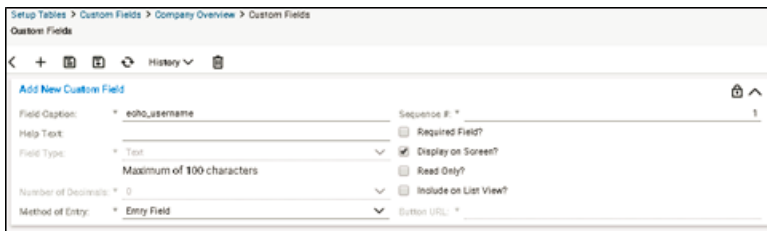
<https://campus.barracuda.com/doc/96025777/>

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 third-party integration.

Partners can resolve a ConnectWise "Company ID" conflict by adding a custom field in the ConnectWise Company Overview page.

To add the custom field, perform the following steps.

1. In the ConnectWise Manage Portal select **System, Setup Tables, Custom Fields, Company Overview**.
2. In the Field Caption field, type the New Custom Field named called "echo_username " as shown in the example below.



Setup Tables > Custom Fields > Company Overview > Custom Fields

Custom Fields

Add New Custom Field

Field Caption: * echo_username Sequence #: * 1

Help Text: _____

Field Type: * Text

Maximum of 100 characters

Number of Decimals: * 0

Method of Entry: * Entry Field

Required Field?

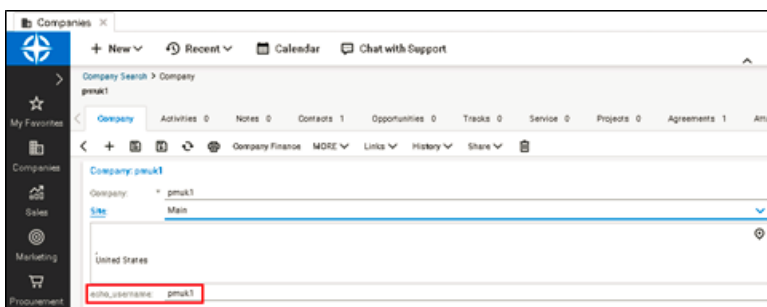
Display on Screen?

Read Only?

Include on List View?

Button URL: *

3. Click **Save**.
4. In the ConnectWise Manage Portal select **Company, Company Search, Company**.
 - o The ECHO account username must be unique for each company so the ECHO account can link with the ConnectWise Company.
 - o The ECHO account username entered in the "echo_username" Custom Field must be identical to the ECHO account username.
 - o The echo_username field should only be populated if it is different from the Company ID.
5. In the field called "echo_username" type the ECHO account username, as shown below.



Companies

+ New Recent Calendar Chat with Support

Company Search > Company

pmuk1

Company

Company Finance MDRE Links History Share

Company pmuk1

Company: * pmuk1

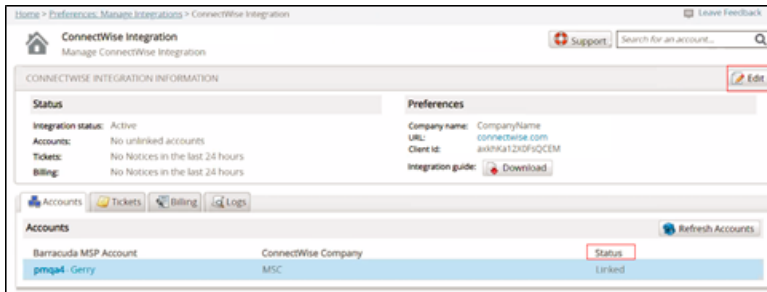
Site: Main

United States

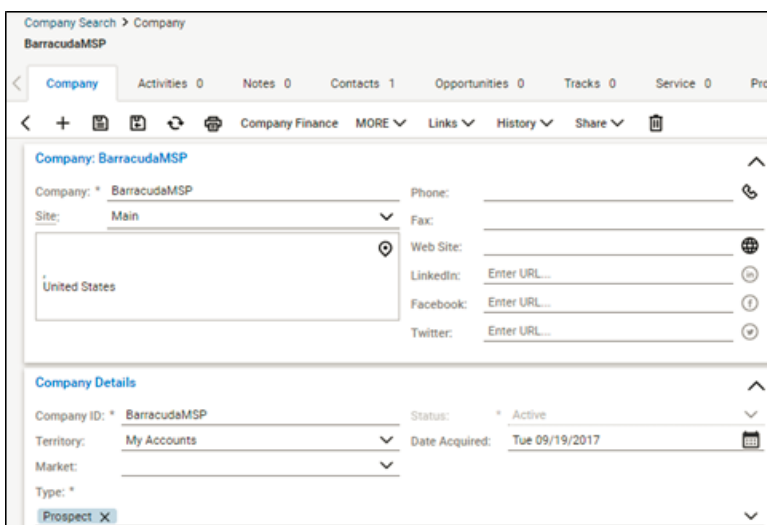
echo_username: pmuk1

6. Click **Save**.
7. Refresh the ConnectWise Integration page.
Your account is displayed with updated Link Status and with an Edit button to make any future

modifications to your preferences, as shown in the example below.



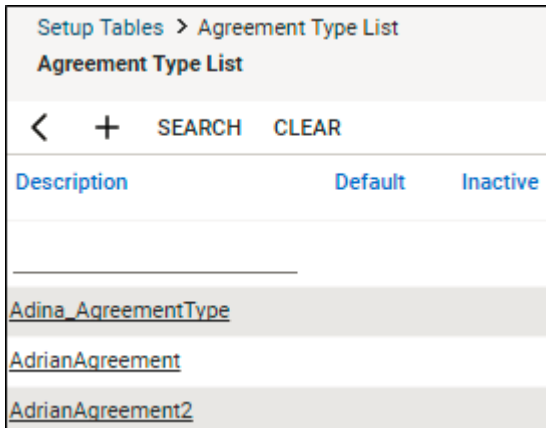
The Company profile is displayed.



8. Click the **Agreements** tab.
The Agreement Search page is displayed.

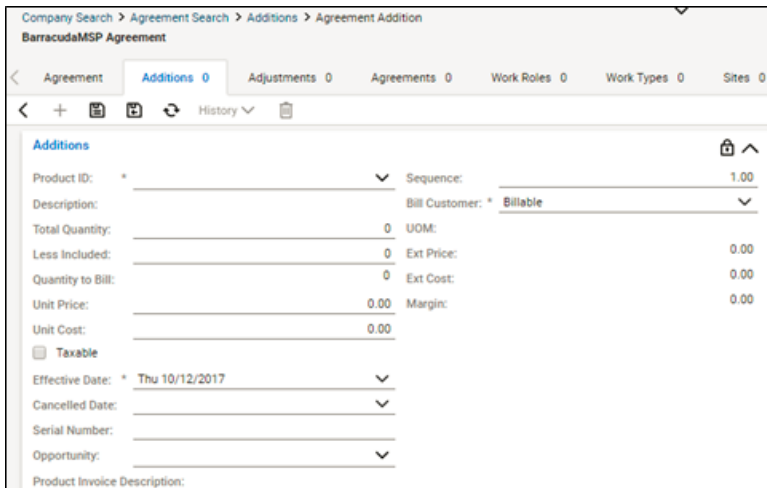


9. Click the Agreement Type link.
The Agreement Type List is displayed, as shown in the following example.

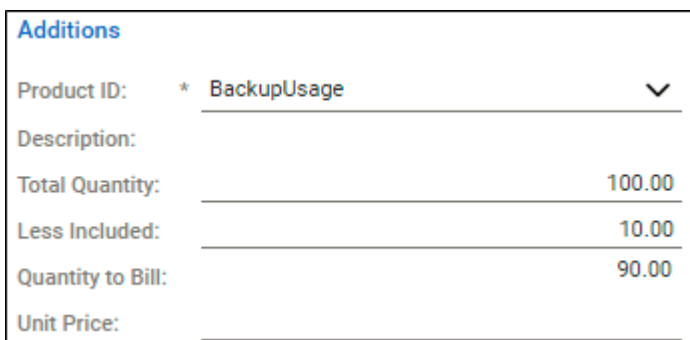


- Click the agreement you want to modify, click the **Additions** tab, and then click the New Item icon.

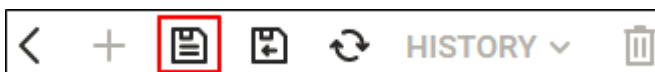
The Agreement Addition page is displayed.



- At the Less Include field, type the number of included units (either GBs or local backup subscriptions, depending on which addition you are editing), as shown below.



- Click the Save icon, as shown below.



Figures

1. image2022-1-11 15:28:33.png
2. image2022-1-11 15:30:57.png
3. image2022-1-11 15:31:51.png
4. image2022-1-11 15:32:33.png
5. image2022-1-11 15:33:17.png
6. image2022-1-11 15:33:59.png
7. image2022-1-11 15:34:36.png
8. image2022-1-11 15:35:30.png
9. image2022-1-11 15:36:3.png

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