

Task 7. Adding Custom Fields to Link ECHOplatform Accounts to ConnectWise Companies

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

To avoid 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 must add a custom field to 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.

Oustom Fields	Fields > Company Overview > Custom Fields		
(+ 🗈 🗉	⊕ History∨ 自		
Add New Custom Fie	ea.		₫ ^
Field Caption:	echo_usemane	Sequence #: *	1
Help Text		Required Field?	
Field Type:	* Test	 Display on Screen? 	
	Maximum of 100 characters	Read Only?	
Number of Decimals:	· 0	/ 📄 Include on List View?	
Method of Entry:	* Emry Field	Button URL: *	

- 3. Click Save.
- 4. In the ConnectWise Manage Portal select **Company**, **Company Search**, **Company**.
 - The ECHO account username must be unique for each company so the ECHO account can link with the ConnectWise Company.
 - $^\circ\,$ The ECHO account username entered in the "echo_username" Custom Field must be identical to the ECHO account username.
 - 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.

E Compa	nies ×	
*	+ New Y 🚯 Recent Y 🛅 Calendar 🛱 Chat with Support	~
> ★	Company Search > Company person	
My Fevorites	Company Activities 0 Notes 0 Contacts 1 Opportunities 0 Tracks 0 Service 0 Projects 0 Agreements 1	Arted
lla 🛛	< + 🗈 🗈 🕹 🐵 Company Finance MORE V Links V History V Share V 📋	
Companies	Company: pmsk1	
ೆ	Company: * pmuk1	
Sales	Site Main	~
0		۲
Marketing	United States	
Ä		
Procurement	elho,username pmult	

- 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.

Barracuda Intronis Backup



	Vise Integration ionnectWise Integration		Support Search for an a			
CONNECTWISE IN	TEGRATION INFORMATION				20	
Status			Preferences			
Integration status: Accounts: Tickets: Billing:	Active No unlinked accounts No Notices in the last 24 hours No Notices in the last 24 hours		Company name: CompanyName URL: connectaise.com Client ld: axi8NKa12XIDFsQCEM Integration guide:			
📥 Accounts 🛛 💪	Tickets Billing Logs					
Accounts					🔒 Refresh Accounts	
Barracuda MSP /	Account	ConnectWise Company		Status		
pmga4-Gerry		MSC		Linked		

The Company profile is displayed.

Company	Activities	0	Notes 0	Contacts	1	Opportu	nities	0	Tracks 0	Service 0	
+ 🖺	E 0	@	Company Fina	ance MOR	ΕV	Links 🗸	н	istory 🗸	Share 🗸	Ū.	
Company: Ban	racudaMSP										
Company: * B	arracudaMSP					Phone:					
Site; M	lain				~	Fax:	_				
				(Э	Web Site:	_				
to a second						LinkedIn:	Ent	er URL			
United States						Facebook:	Ent	er URL			
						Twitter:	Ent	er URL			
Company Deta	ils										
Company ID: *	BarracudaM	SP				Status:		Active			
Territory:	My Accounts				~	Date Acquire	d:	Tue 09/1	9/2017		
Market:					~						

8. Click the **Agreements** tab.

The Agreement Search page is displayed.

Setup Tal Setup Tal			
SEARCH	CLE/	AR	
Category		Table 个	Description
	\sim	Agreement Type	
Agreements		Agreement Type	Example: Block Time, Gold Support, Web Hosting

9. Click the Agreement Type link.

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

Setup Tables > Agreement Type List Agreement Type List								
<	+	SEARCH	CLEAR					
Descr	iption		Default	Inactive				
Adina_	Adina_AgreementType							
AdrianAgreement								
Adrian	Agreen	nent2						



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

The Agreement Addition page is displayed.

Agreement	Additions 0	Adjustments 0	Agre	ements 0	Work Roles 0	Work Types 0	Sites
+ 🖺 🛛	🖺 🔂 Histor	y∨ 📋					
Additions							6 /
Product ID: *			~	Sequence:			1.0
Description:				Bill Customer: *	Billable		\ \
Total Quantity:			0	UOM:			
Less Included:			0	Ext Price:			0.0
Quantity to Bill:			0	Ext Cost:			0.0
Unit Price:			0.00	Margin:			0.0
Unit Cost:			0.00				
Taxable							
Effective Date: *	Thu 10/12/2017		~				
Cancelled Date:			~				
Serial Number:							
Opportunity:			~				

11. 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.

Additions			
Product ID:	*	BackupUsage	~
Description:			
Total Quantity:			100.00
Less Included:			10.00
Quantity to Bill:			90.00
Unit Price:			

12. Click the Save icon, as shown below.



For IBU users, go to Task 8. Entering ConnectWise Credentials in ECHOplatform.

For MSP App users, go to <u>Setting Up ConnectWise Manage Integrations</u>.



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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