

Map Company Types

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Overview

When synchronising Companies from ConnectWise to Emersion, service providers can choose to synchronise all companies or just some, based on the *company type*.

This article guides users to setting up:

- which ConnectWise company types should be synchronised when accounts are created in Emersion.
- The Emersion account type and [account profile](#) to assign when the new Emersion company.

Business Rules

The account profile must exist in Emersion before it will appear in the list.



In some situations, if a mapping does not exist then the item will be skipped

If company type mappings are not present when the sync is *enabled*, the objects will not sync to the destination.

Synchronisation Support

This mapping is only used when the integration is configured to **Pull** Companies and Contacts data.

For service providers who are syncing in the other direction, the chosen **company type** field on the [Companies and Contacts settings](#) page (under the **Push: Emersion ConnectWise** section) is always used.

Mapping Company Types

To access the company types mapping page, go to **Integration > ConnectWise > Mappings > Company Types**

Connectwise Company Type	Sync	Emersion Account Type	Emersion Account Profile
Customer	☒	End User	Not Selected
Partner	☐	End User	Not Selected
Vendor	☐	End User	Not Selected
Suspect	☐	End User	Not Selected
Competition	☐	End User	Not Selected
Not-a-fit	☐	End User	Not Selected
Unknown	☐	End User	Not Selected
Prospect	☒	End User	Test Profile
Owner	☐	End User	Not Selected

For each ConnectWise Company type:

1. include it in the sync schedule by ticking the check box flag.
2. select the Emersion account type that it will create
3. select the Emersion account profile that the new account will be assigned.

When you are finished, press **Save**.

Related Pages

- [ConnectWise Invoice Settings](#)

- [ConnectWise Accounts and Contact Sync Fundamentals](#)
- [ConnectWise Accounts Data Mapping](#)
- [Pull Invoices from ConnectWise to Emersion](#)
- [ConnectWise Invoice Sync Fundamentals](#)
- [Push Invoices to Emersion from ConnectWise](#)
- [ConnectWise Company and Contact Settings](#)
- [ConnectWise](#)
- [ConnectWise Administration Settings and Mappings](#)
- [Override ConnectWise Product Defaults For a Package Plan](#)
- [Map Company Status](#)
- [ConnectWise Connection Settings](#)
- [Map Communication Types](#)
- [Map Tax Codes](#)
- [ConnectWise Product Default Settings](#)