

ID964 Contract Sync

EA Field	CW Field	Inserts	Updates	Notes
Contract 'Header' Fields				
1 Contract Number	1 ZCJ_ContractNumber	Next contract number from EA	Not touched	Contract number can be changed in EA after the contract is created by the sync. This will not change the contract mapping.
2 Customer	2 Company	Yes	Yes	Once billed in CW, the company on the agreement can not be changed.
3 Contract Type	NA	Copied from contract template	Not touched	
4 Contract Bill Code	NA	Copied from contract template	Not touched	
5 Status	NA	Yes	Yes	
6 Billing method	NA	Copied from contract template	Not touched	Once billed in EA, the billing method on the contract can not be changed.
7 Start Date	3 Agreement Start Date	Yes	Not touched	Once billed in CW, the start date of the agreement ca not be changed.
8 Expiration Date	4 End Date	Yes	Yes	No expiration date is populated if the agreement is set to no end date
9 Billing Cycle	5 Billing Cycle	Yes	Not touched	Once billed in either system, the billing cycle can not be changed.
10 Billing Period	6 Invoice Month/Year	Yes	Yes	Updated each month to match the billing period on the invoice from CW
11 Use Equipment Base Rates	NA	Copied from contract template	Not touched	
12 Base Rate	7 Invoice Total	Yes	Yes	Updated each month to match the invoice amount from CW
13 Base Distribution Code	NA	Copied from contract template	Not touched	
14 Activated On	NA	Yes	Not touched	Matches the start date on the contract
15 Terminated On	NA	Yes	Yes	Set to the date the sync terminates the contract
16 Termination Code	NA	Yes	Yes	Pulled from the default termination code set on ID964

Contract number: CW33799-0365 ¹ Rev: 01

Customer: AY02 - Amys Yoga Studio ²

Contract type: Type 128 - Type 128 ³

Contract bill code: MITInclusive - MIT All Inclusive Agreements ⁴

Status: Active - Active contract for the date range ⁵

Billing method: **Installment based** ⁶

Start date: 1/22/2025 ⁷

Expiration date: 2/28/2025 ⁸

Renewable: ☒ Renewable

Renewal cycle:

Installation based billing ⁹

Base rates

Billing cycle: Monthly - Monthly ⁹

Billing period: 3/ 1/2025 ¹⁰ through: 3/31/2025

☐ Bill base rate in arrears

Bill base in advance: 0 Month

☐ Use contract base rate

☐ Use equipment base rates

Base rate: ¹² \$620.00 ¹¹

for: 1 Month

☐ Use standard distribution ☐ Use custom distribution

Base distribution code: MSP Contracts MSP Contracts ¹³

[View base billing schedule](#)

Cycle: Monthly

Base: \$620.00

☐ Use base cycle consolidation

Billed through: Friday, February 28, 2025

Billing on: Saturday, March 1, 2025

¹⁴ Activated on: 1/22/2025 ¹⁵ Terminated on: 2/ 3/2025 ¹⁶ Termination code:

Renewed/Revised: 2/ 3/2025 ¹⁷ Renew/Revise

OK Cancel

¹⁸ This contract will bill to customer 'Studio 4'.

Company: Amys Yoga Studio

Company: * Amys Yoga Studio ²

Contact: * Becky Frahm

Direct ³ (515) 440-1670

Email: becky@amysyoga.com

Site: Main

220 Mills Civic Parkway
Des Moines, MN 502661
United States

Billing Information: Amys Yoga Studio

Bill To Company: Amys Yoga Studio

Billing Contact:

Billing

8001 Ralst Unite

Agreement Additions 3 Attachments 0 Invoices 2 Adjustments 0

SEARCH CLEAR

Invoice Nbr Date Amount Status Type ⁶ Month Year

All

Agreement: Office 365 User Licenses

Agreement Name: * Office 365 User Licenses

Agreement Type: * User Based +

Start Date: ³ Wed 01/22/2025

End Date: ⁴ Sat 02/28/2026 ☐ No End Date

Location: * Tampa ☐ Restrict

Department: * Admin ☐ Restrict

SLA:

ZCJ_ContractNumber: CW33799-01 ¹

Oppor: 72947 3/1/25 ⁷ \$620.00 Closed Agreement 3 2025

Custoi: 72946 2/3/25 \$1,380.00 Closed Agreement 2 2025

Cancellation Reason:

EA Field	CW Field	Inserts	Updates	Notes
<i>Billing and Contact Tab</i>				
1 Bill to	1 Bill To Company/Bill to Site	Yes	Yes	If billing site is NOT the main site, and the site is mapped to a location in EA, the sync will use that customer in EA as the bill to customer
2 Branch	NA	Yes	Yes	Pulled from the customer record at the contract header
3 Bill contract	NA	Yes	Yes	When contract is invoiced in EA, this box is unchecked by the sync and then checked when the contract is next updated by a new invoice from CW
4 Billing group	NA	Copied from contract template	Not touched	
5 Tax code	NA	Yes	Not touched	Pulled from the customer record at the contract header
6 Taxable	NA	Yes	Not touched	Pulled from the customer record at the contract header
7 Use equipment tax codes	NA	Copied from contract template	Not touched	
8 Terms	NA	Yes	Not touched	Pulled from the customer record at the contract header
9 Sales rep	2 ZCJ_EASalesRep	Yes	Yes	Option to set the sales rep on the EA contract to match a custom field from CW or use the sales rep on the customer record in EA. Default is to not set the sales rep on the contract.
10 Report Group	NA	Copied from contract template	Not touched	
11 Contact Name	3 Contact	Yes	Not touched	
12 Blanket PO	4 CW Invoice Number/PO Number	Yes	Yes	By default, will populate with the invoice # from CW. Option to switch the invoice number to post in the remarks field in EA, then any PO from the CW agreement will post here.

Billing/Contact *

*Bill to: AY02-001 - Studio 4
800 Main Street
Ralston, NE 68127

*Branch: Branch 102 - Branch 102

☐ Group invoices according to customer, bill to, etc.

☒ Bill contract

Billing group: CW Agreements - CW Agreements

Tax code: BA3 - Bartow Cty Gov't

☐ Taxable

☒ Use equipment tax codes

Exempt code:

Terms: C - C.O.D.

Sales rep: MAK - Bob Number 238

*Report group: CW Details - CW Details

Contact:
Name: Amy
Phone:
Fax:

Blanket PO:
Lease schedule number:
Job:
Charge method:

☐ Lock bill code

☒ Use latest bill code revision upon renewal

Lease mode: None - No extended

Company: Amys Yoga Studio

Company: Amys Yoga Studio

Contact: Becky Frahm

Direct (515) 440-1670

Email: becky@amysyoga.com

Site: Main

220 Mills Civic Parkway 123
Des Moines, MN 5026612345
United States

Billing Information: Amys Yoga Studio

Bill To Company: Amys Yoga Studio

Billing Contact:

Billing Site: Studio 4

800 Main Street
Ralston, NE 68127
United States

Agreement: Office 365 User Licenses

Agreement Name: Office 365 User Licenses

Agreement Type: User Based +

Start Date: Wed 01/22/2025

End Date: Set 02/28/2026

Location: Tampa

Department: Admin

SLA:

ZCJ_ContractNumber: CW33799-01

ZCJ_CustomerNumber:

ZCJ_InvoiceNumber:

ZCJ_EASalesRep:

Opportunity:

Customer PO:

Cancellation Reason:

Active Unlimited 0.00

Invoicing Recap			
Active	Last Invoice Date:		03/01/2025
Unlimited	Last Invoice Number:	4	72947
0.00	Last Invoice Amount:		\$620.00

EA Field	CW Field	Inserts	Updates	Notes
<i>Item Details</i>				
1 Item number	1 Product ID	Yes	Yes	Items no longer billed in CW will be terminated on contract in EA
2 Description	2 Product Invoice Description	Yes	Yes	
3 Quantity	3 Quantity to Bill	Yes	Yes	
4 Unit base rate	4 Unit Price	Yes	Yes	
5 Base rate	5 Ext Price	Yes	Yes	
6 Start Coverage Date	6 Effective Date	Yes	Not touched	
6 Start base billing date	Effective Date	Yes	Not touched	
7 End coverage date	7 Cancelled Date	Yes	Yes	
7 End base billing date	Cancelled Date	Yes	Yes	
8 Base Distribution Code	NA	Pulled from the EA item record	Pulled from the EA item record	
9 Bill code	NA	Pulled from EA contract record	Not touched	
10 Tax code	NA	Pulled from EA customer record	Not touched	
11 Override Taxable	NA	Yes	Yes	
12 Branch	NA	Pulled from EA customer record	Not touched	
13 Location customer	8 ZCJ_EALocation	Yes	Yes	The custom field ACJ_EALocation in CW must match the EA customer number exactly

Equipment/Item * Miscellaneous Item limits Custom properties

☐ Equipment ☒ Item

*Item number: 1 Office365 - Office365

Make and model: ---

Description: 2 Office365

Serial number: ---

Quantity: 3 5

Unit base rate: 4 \$75.00

Base rate: 5 \$375.00 for one month

*Start coverage date: 6 2/ 1/2025

*Start base billing date: 6 2/ 1/2025

End coverage date: 7 2/28/2026

End base billing date: 7 2/28/2026

Termination code: ---

☐ Inherit distribution code from Installment based billing tab

☒ Use standard distribution ☐ Use custom distribution

*Base distribution code: 8 MSP Contracts - MSP Contracts

Bill code: 9 MITInclusive - MIT All Inclusive Agreements

SLA code: ---

*Tax codes: 10 BA1 - Bartow Cty Taxable

☒ Override taxable 11 ☐ Taxable

Exempt code: ---

*Branch: 12 Branch 102 - Branch 102

Location: ---

*Customer: 13 AY02 - Amys Yoga Studio

Amys Yoga Studio (AY02)
220 Mills Civic Parkway 123
Des Moines, MN 5026612345
USA

Remarks: ---

Base billed through: 2/28/2025
Base billed through:** 2/28/2025
Base period:** 3/1/2025 - 3/31/2025

**Contract date vs. equipment date

[View base billing schedule](#)

Cycle: Monthly
Base: \$375.00

Agreement Additions 3 Attachments 0 Invoices 2 Adjustments 0 Agreements 0 Work Roles 1

< + [Icons] History [Icon]

Additions

Product ID: 1 * Office365	Sequence: 3.00
Description: Office365	Bill Customer: * Billable
Total Quantity: 5	Invoice Group: ---
Less Included: 0	UOM: Each
Quantity to Bill: 3	Ext Price: 5 375.00
Unit Price: 4 75.00	Ext Cost: 50.00
Unit Cost: 10.00	Margin: 325.00

☐ Taxable

Effective Date: 6 Mon 02/03/2025

Cancelled Date: 7

Serial Number: ---

Opportunity: ---

ZCJ_EALocation: 8

Product Invoice Description: 2 Office365

☐ Drop Ship

☐ Special Order

☐ Purchase Item