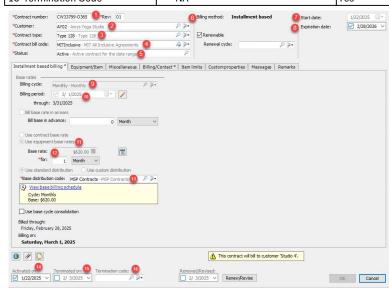


ID964 Contract Sync

EA Field	CW Field	Inserts	Updates	Notes		
Contract 'Header' Fields						
1 Contract Number	1 701 ContractNumber	Next contract number from EA	Not touched	Contract number can be changed in EA after the contract is created by the sync.		
	1 ZCJ_ContractNumber	Next contract number from EA	Not touched	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		

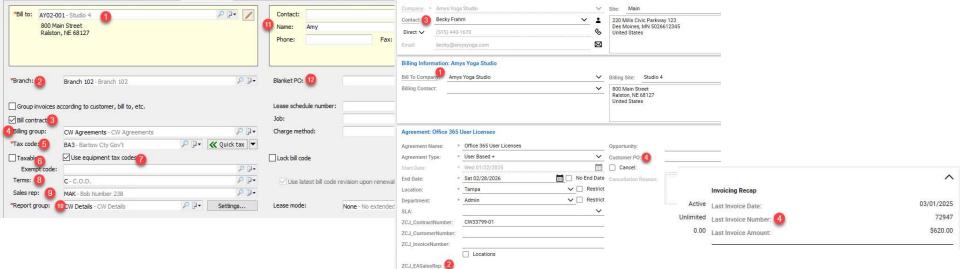


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Company: Amys Yoga Stud	dio	·						
Company: * Amys Yoga St	tudio 🙎	~	Site: Main					
Contact: * Becky Frahm		× 1	220 Mills Civic Parkwa					
Direct 🗸 (515) 440-167	70	S	Des Moines, MN 5026 United States	b1				
Email: becky@amysy	yoga.com	⊠						
Billing Information: Amys	Yoga Studio							
Bill To Company; Amys Yo	oga Studio	~	Billing					
Billing Contact:		~	800 I C Agreeme	nt Additions	3 Attachments 0	Invoices 2	Adjustmen	ts O
			Raist Unite C SEARCH	CLEAR				
			Invoice Nbr	Date	Amount Status	Туре	6 Month	Year
Agreement: Office 365 Use	er Licenses			All 🗸		~	~	-
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Department: * A	summ							
Department: * A	Samm	~						



EA Field	CW Field	Inserts	Updates	Notes		
Billing and Contact Tab						
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		
3 Bitt contract				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		
				Option to set the sales rep on the EA contract to match a custom field from CW or		
9 Sales rep	2 ZCJ_EASalesRep	Yes	Yes	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			
	4 CW Invoice Number/PO Number	Yes	Yes	By default, will populate with the invoice # from CW. Option to switch the invoice		
12 Blanket PO				number to post in the remarks field in EA, then any PO from the CW agreement will		
				post here.		

Installment based billing * Equipment/Item | Miscellaneous | Billing/Contact * | Item limits | Customproperties | Messages | Remarks | Company: Amys Yoga Studio



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EA Field	CW Field	Inserts	Updates	Notes			
Item Details	Item Details						
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			

