

ID965 Service Ticket Sync

EA Field	CW Field	Notes
<i>Service Call 'Header' Fields</i>		
1 Customer	1 Company	Company must be linked to customer record via the ZCJ_CW_CompanyID custom property
2 Call number	2 Ticket # / Invoice #	Default option uses the next call number from EA, option to use the CW ticket # Invoice # as call number in invoice-only mode.
3 Item number	NA	CW-Service item is added to all calls created by ID965
4 Location	NA	Location always matches main company
5 Contract	3 Agreement	
6 Description	4 Summary	
7 Caller	5 Contact	
8 Call type	6 Ticket Type	
9 Priority	NA	Priority is pulled from the call type used on the call in EA
10 Technician	7 Ticket Owner	If there is no ticket owner, the member from the last time entry will be used as the tech on the call.
11 Call received at	8 Entered time	If there is a time entry that predates the entered time, the sync will roll back the received at time in EA to match the first time entry
12 PO number	9 Customer PO	
13 Bill code	NA	Pulls from bill code on the CW-Service item set on the contract, if no contract, uses the default bill code in variable 5.

Customer: Amys Yoga Studio 1

Service calls:

Invoice	Cleared	Call number	Equipment/Item	Description	Serial number	Make
<input checked="" type="checkbox"/>	Yes	CW148981 72923	CW-Service	ConnectWise		

Call: CW148981 72923 2

Ready to review (cleared)

Call info * Labor Materials Problems / Repairs Service report Miscellaneous Holds Remarks

Equipment
 Item

Item number: 3 CW-Service - ConnectWise

Location: 4 AY02 - Amys Yoga Studio

Contract: 5 CW33782-01 - Type 128

Description: 6 CW Ticket #148981 Having network issues

Caller contact:

Caller: 7 5154401669

Location remarks:

Location address: AY02 - Amys Yoga Studio

Call type: 8 Network - Network Support by t

Priority: 9 8 - Priority 8

Technician: 10 AMW1 - Amy Wickett

Call received at: 11 12/26/2024 8:59 AM

Due by: 12/26/2024 8:59 AM

Start time - est.: 12/26/2024 8:59 AM

Duration - est.: 01:00

PO number: 12

Bill code: 13 MITInclusive - MIT All Inclusive /

Job:

Sales rep: AMW1 - Amy Wickett

Summary: * Having network issues 4

Age: 38d 17h 51m [SCREENCONNECT SESSION](#) [FOLLOW](#)

Company: Amys Yoga Studio 1

Company: * Amys Yoga Studio Site: Main

Contact: 5 Becky Frahm Address 1: 220 Mills Civic Parkway 123

Ticket: 5 (515) 440-1669 Address 2:

Email: becky@amysyoga.com City: Des Moines

State: MN

CustomField2: Zip: 5026612345

Country: United States

Ticket #148981 2

Board: * Help Desk SLA: No SLA

Status: * >Closed Agreement: 3 User Based +/-Testing Agreement Group Bill - Copy

Type: 6 Network Predecessor:

Subtype: Estimated Start Date:

Item: Due Date:

Ticket Owner: 7 Amy Wickett

CustomField1:

Entered By: 8 Amy Wickett Notify Fri 12/27/2024 at 3:08 PM UTC-06 Customer PO: 9

Assigned By: Amy Wickett Reference:

Closed By: Amy Wickett Est. Time Rev: 0.00 USD

Fri 01/03/2025 at 3:02 PM UTC-06 Est. Expense Rev: 0.00 USD

EA Field	CW Field	Notes
<i>Service Call Labor Entries</i>		
1 Technician	1 Member	
2 Activity Code	2 Work type	If there is no match between work type and activity code, the activity code from the call type will be used.
3 Arrival	3 Start time	
4 Departure	4 End time	
5 Labor Rate	5 Hourly Rate	If sync is running in Override Bill Code mode, labor rate and labor hours are pulled from these fields in CW. If the sync is running in the default mode, these two fields in EA are calculated based on the bill code
6 Labor hours	6 Total hours - Applied hours	

*Technician: AMW1 - Amy Wickett 1 Assist
 *Activity code: 2 L - Standard Labor
 Dates and Times:
 Dispatched: 3 12/26/2024 9:00 AM
 Arrival: 3 12/26/2024 9:00 AM
 Departure: 4 12/26/2024 11:00 AM
 *Tax as: LABOR - Standard Labor Tax
 Odometer reading:
 Beginning: 0
 Ending: 0
 Mileage: 0
 Labor rates:
 Regular: 5 \$125.00
 Overtime: \$125.00
 Billing entries:
 Labor hours: 6 0
 Overtime hours: 0
 Travel hours: 0
 Billable mileage: 0
 Amount: \$0.00

Overview
 Company: 1 Member: * Amy Wickett
 Date: * Thu 12/26/2024 Overnight Location: * Tampa
 Work Role: * Consultant Department: * Help Desk
 Agreement: User Based +/-Testing Agreement Group Bill - Copy Ticket Status: * >Closed
 Add notes to: Discussion Internal Resolution

Billing Options
 Hourly Rate: 5 125.00 USD 1
 Overage Rate: USD
 Total Hours: 6 2.00
 Applied Hours: 6 2.00 1
 Invoice Hours: 2.00

Time Details
 Start Time: 3 8:00 AM End Time: 4 10:00 AM Deduct: 0.00 Actual Hrs: 2.00 Work Type: * 2 Regular Billable: * Billable

EA Field	CW Field	Notes
<i>Service Call Remarks/Notes</i>		
1 Remarks	1 Resolution Remark	If there is no note in CW marked as the resolution, a default remark of 'Ticket #XXXX closed'
2 Call Notes	Summary of time entries	One call note added to call with a summary of the time entries on the ticket in CW

Ready to review (cleared) OK to Invoice
 Call info * Labor Materials Problems / Repairs Service report Miscellaneous Holds Remarks
1 Remarks:
 Talked to Becky, their network is currently down. working again.
2 Note:
 Amy Wickett: From Dec 26 2024 9:00AM to Dec 26 2024 11:00AM, 2 hours at rate of 125.00, (Regular)

work note: Labor Entry Department: * Help Desk
 Agreement: User Based +/-Testing Agreement Group Bill - Copy Ticket Status: * >Closed
 Add notes to: Discussion Internal Resolution 1
Billing Options
Time Details
 Start Time: * 8:00 AM End Time: 10:00 AM Deduct: 0.00 Actual Hrs: 2.00 Work Type: * Regular Billable: * Billable
 Notes: 1
 Talked to Becky, their network is currently down. Walked them through some troubleshooting steps and we were able to get everything working again.