

ID522 Project Invoice 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 ID522
4 Location	NA	Location always matches main company
5 Contract	3 Agreement	
6 Description	4 Summary	Description contains ticket summary along with CW ticket # and Project name
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	PO number in CW is set on the finance tab of the project
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	SC704983	CW-Service	ConnectWise		
<input checked="" type="checkbox"/>	Yes	SC704984	CW-Service	ConnectWise		

Call: SC704984 2

Ready to review (cleared) i OK to Invoice

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 #148962 Documentation Sample 2/1075 Accounting Setup

Caller contact:

Caller: 7

Location remarks:

Call type: 8 ECIWeb - Call entered via web

Priority: 9 1 - Priority 1

Technician: 10 AMW1 - Amy Wickett

Call received at: 11 10/29/2024 2:14 PM

Due by: 10/30/2024 8:14 AM

Start time - est.: 10/30/2024 8:14 AM

Duration - est.: 01:00

PO number: 12

Bill code: 13 MITInclusive - MIT All Inclusive /

Job:

Summary: * Accounting Setup 4

Age: 97d 21h 15m SCREENCONNECT SESSION FOLLOW

Company: Amys Yoga Studio 1

Company: Amys Yoga Studio Site: Main

Contact: 5 Address 1: 900 Main

Ticket: Address 2: City: State: Zip: Country: United States

Email: CustomField1: CustomField2:

CustomField2: Country: United States

Ticket #148962 2

Board: * Integrations Test Agreement: 3 User Based +/Service Testing

Status: * Finished Project: Documentation Sample 2

Type: 6 Phase: New Client Information / Setup

Subtype: WBS Code: 1.2

Item: Predecessor:

Ticket Owner: 7 (Unassigned) Estimated Start Date: Due Date: Duration: Priority: Priority 3 - Medium

CustomField1: CustomField2: ZCJ_CustomerNumber: Priority:

Additional Details

Opportunity: Entered By: Amy Wickett Notify

Source: Email Connector 8 Tue 10/29/2024 at 1:14 PM UTC-05

Billing Information for Base Project: Documentation Sample 2

Billing Method: * Actual Rates Down Payment: 0.00 USD

Hourly Rate: 1,000.00 USD Customer PO: 9

Billing Start Date: PO Amount: 0.00 USD

Bill Time?: * Billable Est. Time Cost: 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:
 Entered on 12/27/2024 4:11 PM by CJID965
 Updated on 12/27/2024 4:11 PM by CJID965
 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.