

## ID966 Sales Order Sync

EA Field	CW Field	Notes
<b>Sales Order 'Header' Fields</b>		
1 Number	1 Order Number	
2 Customer	2 Company	
3 Description	3 Opportunity Description	Description in EA also contains the subtotal amount from the CW order
4 Order Type	NA	
5 Sales rep	4 Sales Rep	
6 PO number	5 PO Number	
7 Branch	NA	Pulls from customer record in EA
8 Warehouse	NA	Pulls from customer record in EA
9 Department	NA	Blank unless specified in the variables
10 Status	NA	Pulls from default set in variables

Customer: **2** BA11 - Becca's Art Studio  
Phone:   
Description: **3** ConnectWise Order Subtotal: \$3652.83  
Order Type: Other - Other Order **4**  
Sales rep: **5** AMW1 - Amy Wickett  
PO number: **6**  
Ordered by:   
Branch: **7** Test - Test

Number: **1** CW149  
Date: 1/29/2025  
Due by: 1/29/2025  
Req. date: 1/29/2025  
Warehouse: **8** 1 - Warehouse #1  
Department: **9**  
Status: **10** Open - Open  
Quote:

Summary  
Items total: \$3,652.83  
Discount: \$0.00  
Sub total: \$3,652.83  
Freight: \$0.00  
Tax:   
Total:   
This customer has exceeded their credit limit of \$345,151.10.

Sales Order List > Sales Order  
Sales Order #149 **1**  
Member: Amy Wickett  
Show sales orders for all members

Order Products 2 Attachments 0 Invoices 0 Conversions 0 Configurations 0 Finance Audit Trail

Company: Becca's Art Studio **2**  
Company: \* Becca's Art Studio  
Contact:   
Email:   
Site: Main  
100 Main Street  
Cincinnati, OH 12345  
United States

Sales Order  
Status: \* Synced, DO NOT EDIT  
Opportunity: **3**  
Customer PO: **5**  
Location: \* Tampa  
Department: \* Admin  
Sales Rep: **4** \* Amy Wickett  
Order Date: Wed 01/29/2025  
Due Date:   
Subtotal: 3,652.83 USD  
Sales Tax: 219.17 USD  
Total: 3,872.00 USD

EA Field	CW Field	Notes
<i>Item Fields</i>		
1 Line Number	1 Sequence	Default sequence of items in CW is 1, 2, 3. You can edit the sequence to make a parent/child relationship that will carryover to EA.
2 Item	2 Product ID	
3 Description	3 Description	
4 Quantity	4 Quantity	
5 Price	5 Unit Price	

Items *									
Billing / Shipping * Miscellaneous * Out cost Messages Customproperties Remarks									
<input checked="" type="checkbox"/> Hide canceled line items									
Line	Item	Description	Quantity	Canceled	On hand (Al...	UM	Price		
1	13530347	Microsoft Windows Remote Des...	1	0	2	EA	\$5,000.00		
1.1	**ErrorItem	12RRDLKFJASLKDJFE : New lic...	1	0	0	EA	\$0.00		
1.2	1G100F	1G100F One (1) Span Digital T1...	1	0	0	EA	\$1,666.00		

Order									
Products 3 Attachments 0 Invoices 0 Conversions 0 Configurations 0 Finance Aud									
+ Actions SEARCH CLEAR									
<input type="checkbox"/>	Sequence	Product ID	Description	Quantity	Unit Price	Bill	D		
<input type="checkbox"/>	1.00	13530347	Microsoft Windows Remote Desktop Services 201...	1.00	\$5,000.00	B			
<input checked="" type="checkbox"/>	1.10	12RRDLKFJASLKDJFE	New license	1.00	\$0.00	B			
<input type="checkbox"/>	1.20	1G100F	1G100F One (1) Span Digital T1/E1/PRI to VoIP Ga...	1.00	\$1,666.00	B			

EA Field	CW Field	Notes
<i>Billing/Shipping Tab Fields</i>		
1 Ship to	1 Shipping Site	The ship to will default to the main company on the order, unless the shipping site is not the main site and is mapped to a location customer in EA.
2 Attention	2 Shipping contact	Attn: line is populated if there is a shipping contact in CW.
3 Tax code	NA	Tax Code is pulled from the customer record in EA.
4 Ship method	3 ZCJ_ShipMethod	Ship method will be default set in ID634 variable or there is an option to create a custom field in CW to specify the shipping method to use for the order.

Items \* Billing / Shipping \* Miscellaneous \* Out cost Messages Customproperties Remarks

\*Bill to: AB57 - Analytics by Emily LLC  
100 State Street  
West Lafayette, IN 12345


Ship to: AB57 - Analytics by Emily LLC  
100 State Street  
West Lafayette, IN 12345  
United States  
☐ Same as bill to ☐ Show all customers

Terms: C - C.O.D.  
Terms discount: 0%  
Discount date: 2/14/2025

Charge method: Credit Card/ACH ☐ Auth on OK

Tax code: BL3 - Bulloch Cty Gov't  
☒ Taxable  
Exempt code:  
Order discount: 0%

Ship method: UPSGND - UPS Ground

ZCJ\_EAStatus: Status: Open:Backordered+ 10/2/2024 9:21:22 AM, On Hold: Error c  
ZCJ\_Warehouse: 

**Shipping Information: Analytics by Emily LLC**

Ship To Company: Analytics by Emily LLC  
Shipping Contact:   
ZCJ\_ShipMethod:   
Shipping Site: \* Main  
100 State Street  
West Lafayette, IN 12345  
United States