ID747 Customer Sync

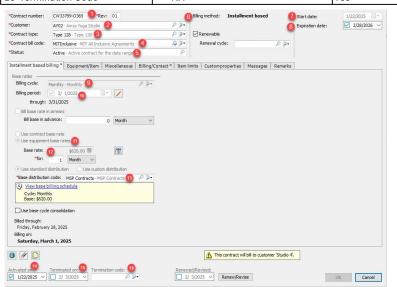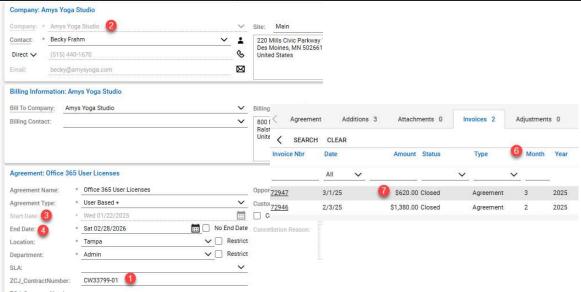| EA Field	CW Field	Inserts	Updates	Notes
Parent Company in EA to Company in CW				
1 Customer Number	1 Company ID	Set to 'EA CustomerID'	Not touched on update	The EA customer ID is the record number from EA, it's not visible in EA and can't be changed.
1 Customer Number	Account Number	Set to match EA	Updated to match EA	
2 Customer Name	2 Company Name	Set to match EA	Updated to match EA	
3 Address	3 Address	Set to match EA	Updated to match EA	
4 City	3 City	Set to match EA	Updated to match EA	
5 State	3 State	Set to match EA	Updated to match EA	State in EA must be either the two character abbreviation or the exact name or inserts and updates will fail.
6 Zip Code	3 Zip Code	Set to match EA	Updated to match EA	
7 Phone Number	4 Phone Number	Set to match EA	Updated to match EA	
8 Fax Number	5 Fax Number	Set to match EA	Updated to match EA	
9 On Hold Code	6 ZCJ_OnHoldCode	Set to match EA	Updated to match EA	
10 Sales Rep	7 ZCJ_SalesRepName	Set to match EA	Updated to match EA	
10 Sales Rep	8 ZCJ_SalesRepEmail	Set to match EA	Updated to match EA	
Child (Location) customer in EA to Site in CW				
1 Customer Name	1 Site Name	Set to match EA	Updated to match EA	
3 Address	4 Address	Set to match EA	Updated to match EA	
4 City	5 City	Set to match EA	Updated to match EA	
5 State	6 State	Set to match EA	Updated to match EA	
6 Zip Code	7 Zip Code	Set to match EA	Updated to match EA	
7 Phone Number	2 Phone Number	Set to match EA	Updated to match EA	
8 Fax Number	3 Fax Number	Set to match EA	Updated to match EA	

All fields updated by the sync can be disabled upon request

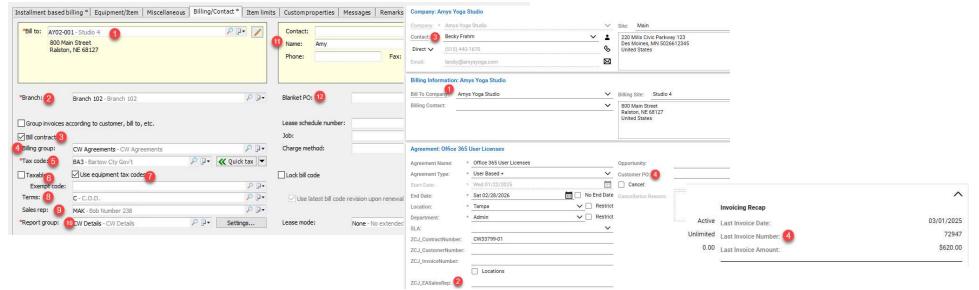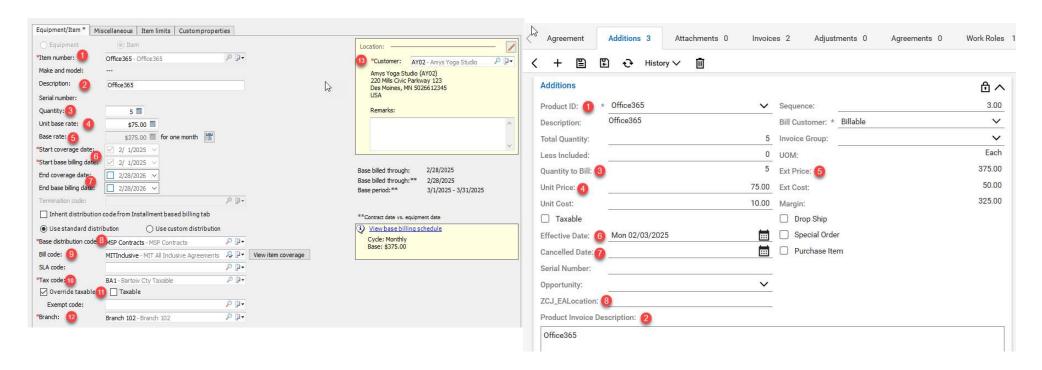| EA Field	CW Field	Inserts	Updates	Notes
Contract 'Header' Fields				
1 Contract Number	1 ZCJ_ContractNumber	Next contract number from EA	Not touched	Contract number can be changed in EA after the contract is created by the sync. This will not change the contract mapping.
2 Customer	2 Company	Yes	Yes	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

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 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.

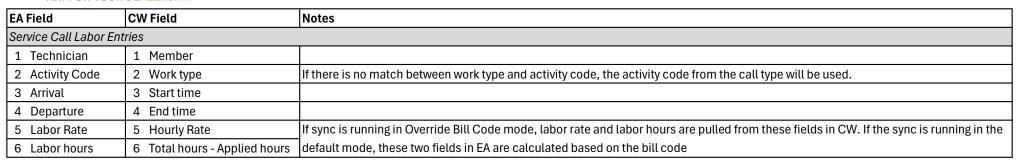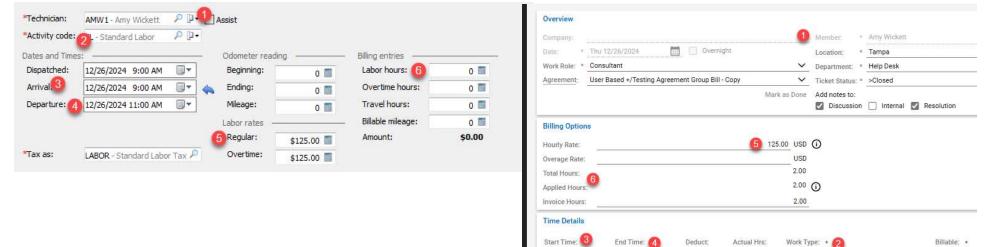| EA Field	CW Field	Inserts	Updates	Notes
Item Details				
1 Item number	1 Product ID	Yes	Yes	Items no longer billed in CW will be terminated on contract in EA
2 Description	2 Product Invoice Description	Yes	Yes	
3 Quantity	3 Quantity to Bill	Yes	Yes	
4 Unit base rate	4 Unit Price	Yes	Yes	
5 Base rate	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

CEO A.I. JUICE
A.I. FOR YOUR DEALERSHIP

ID965 Service Ticket Sync

EA Field	CW Field	Notes
Service Call 'Header' Fields		
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.

EA Field	CW Field	Notes
Service Call Labor Entries		
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
6 Labor hours	6 Total hours - Applied hours	default mode, these two fields in EA are calculated based on the bill code

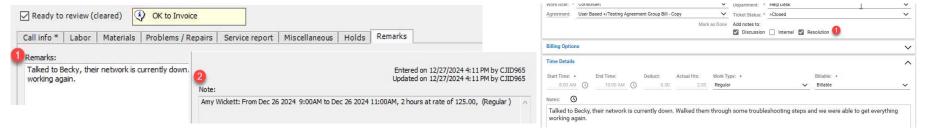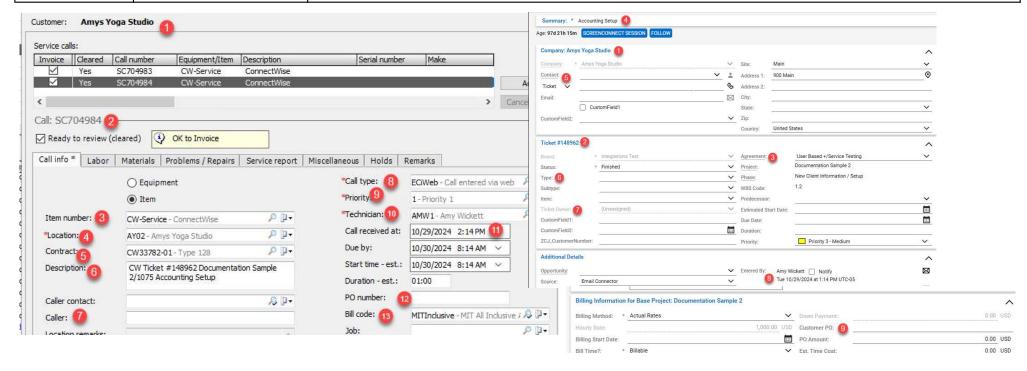| EA Field	CW Field	Notes
Service Call Remarks/Notes		
1 Remarks	1 Resolution Remark	If there is no note in CW marked as the resolution, a default remark of 'Ticket #XXXX closed'
2 Call Notes	Summary of time entries	One call note added to call with a summary of the time entries on the ticket in CW

ID522 Project Invoice Sync

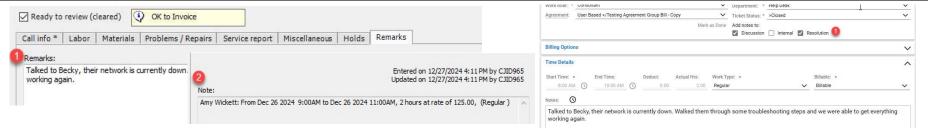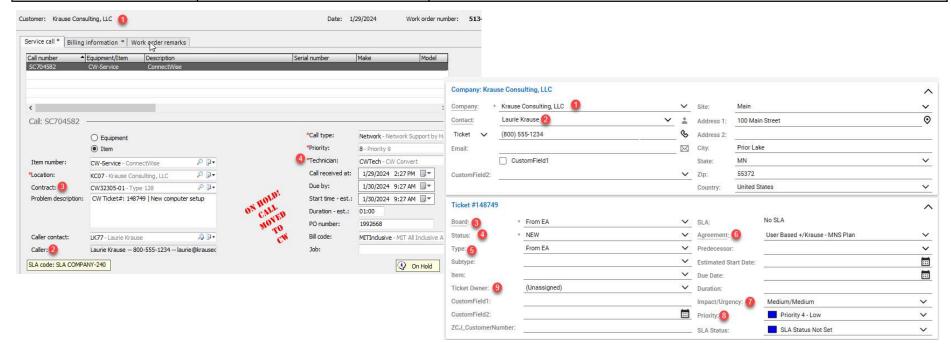| EA Field	CW Field	Notes
Service Call 'Header' Fields		
1 Customer	1 Company	Company must be linked to customer record via the ZCJ_CW_CompanyID custom property
2 Call number	2 Ticket # / Invoice #	Default option uses the next call number from EA, option to use the CW ticket # Invoice # as call number 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.

EA Field	CW Field	Notes
Service Call Labor Entries		
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
6 Labor hours	6 Total hours - Applied hours	default mode, these two fields in EA are calculated based on the bill code

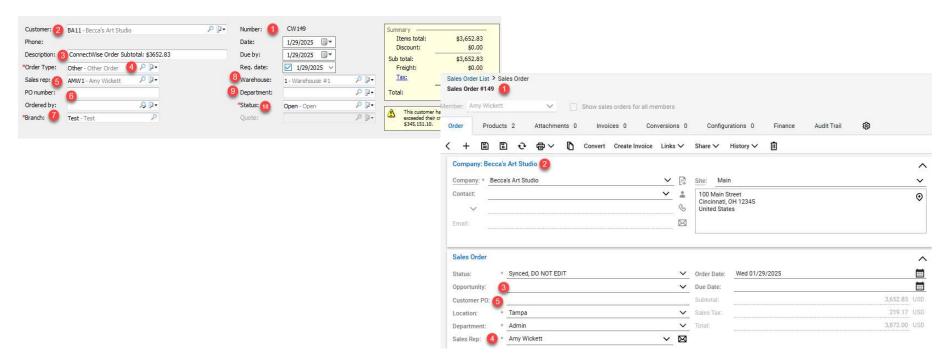| EA Field	CW Field	Notes
Service Call Remarks/Notes		
1 Remarks	1 Resolution Remark	If there is no note in CW marked as the resolution, a default remark of 'Ticket #XXXX closed'
2 Call Notes	Summary of time entries	One call note added to call with a summary of the time entries on the ticket in CW

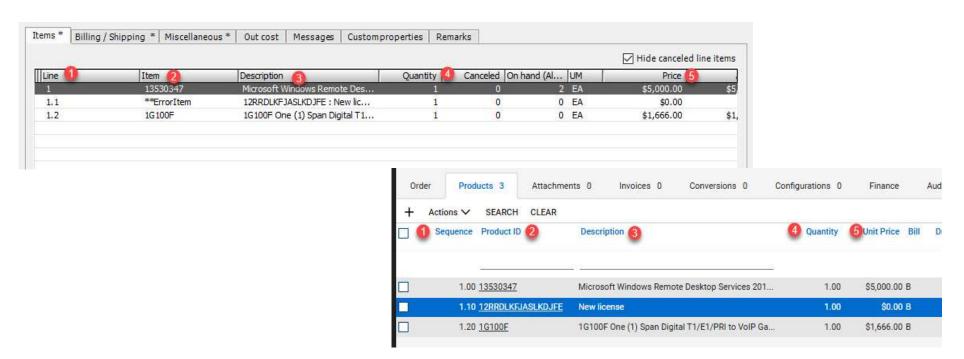| EA Field	CW Field	Notes
Service Call 'Header'		
1 Customer	1 Company	
2 Caller	2 Contact	
NA	3 Board	Pulled from ID912 variable settings
NA	4 Status	Pulled from ID912 variable settings
NA	5 Type	Pulled from ID912 variable settings
3 Contract	6 Agreement	If the contract in EA is linked to an agreement in CW in the CEO Juice background tables, the agreement will be populated. If there's no link then no agreement will be populated.
NA	7 Impact/Urgency	Pulled from ID912 variable settings
NA	8 Priority	Pulled from ID912 variable settings
4 Technician	NA	Tech in EA is the dummy tech that triggers the sync, there is no technician assigned to the ticket in CW.

CEO A.I. JUICE
A.I. FOR YOUR DEALERSHIP

EA Field	CW Field	Notes
Sales Order 'Header' Fields		
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

EA Field	CW Field	Notes
Item Fields		
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	

EA Field	CW Field	Notes
Billing/Shipping Tab Fields		
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.