

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****

2 Name: Amys Yoga Studio **1** Number: AY02
Customer type: Created on: 10/13/2023 (ceojuice)

Address Locations Billing * Account * Messages Contacts Tasks e-info Customproperties

Physical address Billing address
☐ Same as physical address

Attention: Address: **3** 220 Mills Civic Parkway 123
City: **4** Des Moines
County: **5** State: MN
Zip: **6** 5026612345 Country: **7**

Other
Phone 1: **7** 5154401669
Phone 2: **8**
Fax: **8**

Email: Website: **9** www.amysyoga.com

Address Locations Billing * Account * Messages Contacts Tasks e-info Customproperties

Ship method: On hold code: **9**

Sales rep: **10** AMW1 - Amy Wickett
Technician:
Territory:

Company: Amys Yoga Studio

Company: * Amys Yoga Studio **2** **4** Phone: (515) 440-1669
Site: Main **5** Fax:
6 Web Site: www.amysyoga.com

220 Mills Civic Parkway 123
Des Moines, MN 5026612345
United States **3**

ZCJ_CustomerNumber: AY02
ZCJ_OnHoldCode: No Hold
ZCJ_SalesRepName: Amy Wickett **7**
ZCJ_SalesRepEmail: amy@domain.com **8**
ZCJ_EABranch: Branch 102

Company Details

Company ID: * AY02 **1**
Territory: Tampa
Market: Agriculture

Site Details

Company
Amys Yoga Studio

Site* **1**
Studio 2 **1**

Phone **2**
Fax **3**

Address 1
100 North Ashworth **4**

Address 2

City **5**
Hampton Beach

State **6**
New Hampshire

Zip **7**

ID964 Contract Sync

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

Contract number: CW33799-0365 ¹ Rev: 01

Customer: AY02 - Amys Yoga Studio ²

Contract type: Type 128 - Type 128 ³

Contract bill code: MITInclusive - MIT All Inclusive Agreements ⁴

Status: Active - Active contract for the date range ⁵

Billing method: **Installment based** ⁶

Start date: 1/22/2025 ⁷

Expiration date: 2/28/2025 ⁸

Renewable: ☒ Renewable

Renewal cycle:

Installation based billing | Equipment/Item | Miscellaneous | Billing/Contract | Item limits | Customproperties | Messages | Remarks

Base rates

Billing cycle: Monthly - Monthly ⁹

Billing period: 3/ 1/2025 ¹⁰ through: 3/31/2025

☐ Bill base rate in arrears

Bill base in advance: 0 Month

☐ Use contract base rate

☐ Use equipment base rates

Base rate: \$620.00 ¹¹

for: 1 Month

☐ Use standard distribution ☐ Use custom distribution

Base distribution code: MSP Contracts MSP Contracts ¹²

[View base billing schedule](#)

Cycle: Monthly

Base: \$620.00

☐ Use base cycle consolidation

Billed through: Friday, February 28, 2025

Billing on: Saturday, March 1, 2025

¹³ This contract will bill to customer 'Studio 4'.

Activated on: 1/22/2025 ¹⁴

Terminated on: 2/ 3/2025 ¹⁵

Termination code: ¹⁶

Renewed/Revised: 2/ 3/2025

Company: Amys Yoga Studio

Company: * Amys Yoga Studio ²

Contact: * Becky Frahm

Direct (515) 440-1670

Email: becky@amysyoga.com

Site: Main

220 Mills Civic Parkway
Des Moines, MN 502661
United States

Billing Information: Amys Yoga Studio

Bill To Company: Amys Yoga Studio

Billing Contact:

Billing

8001 Ralst Unite

Agreement Additions 3 Attachments 0 Invoices 2 Adjustments 0

SEARCH CLEAR

Invoice Nbr Date Amount Status Type Month Year

All

Agreement: Office 365 User Licenses

Agreement Name: * Office 365 User Licenses

Agreement Type: * User Based +

Start Date: * Wed 01/22/2025

End Date: * Sat 02/28/2026 ☐ No End Date

Location: * Tampa ☐ Restrict

Department: * Admin ☐ Restrict

SLA:

ZCJ_ContractNumber: CW33799-01 ¹

Oppor 72947 3/1/25 \$620.00 Closed Agreement 3 2025

Custoi 72946 2/3/25 \$1,380.00 Closed Agreement 2 2025

Cancellation Reason:

EA Field	CW Field	Inserts	Updates	Notes
<i>Billing and Contact Tab</i>				
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.

Installation based billing *	Equipment/Item	Miscellaneous	Billing/Contact *	Item limits	Customproperties	Messages	Remarks									
<div><div><div>*Bill to: AY02-001 - Studio 4 800 Main Street Ralston, NE 68127</div><div>*Branch: Branch 102 - Branch 102</div><div><input type="checkbox"/> Group invoices according to customer, bill to, etc.</div><div><input checked="" type="checkbox"/> Bill contract</div><div><div>Billing group: CW Agreements - CW Agreements</div><div>*Tax code: BA3 - Bartow Cty Gov't</div><div><input type="checkbox"/> Taxable</div><div>Exempt code:</div><div>Terms: C - C.O.D.</div><div>Sales rep: MAK - Bob Number 238</div><div>*Report group: CW Details - CW Details</div></div><div><div>Contact: Name: Amy Phone: Fax:</div><div>Blanket PO: Lease schedule number: Job: Charge method: Lock bill code Use latest bill code revision upon renewal Lease mode: None - No extended</div></div></div><div><div>Company: Amy's Yoga Studio</div><div>Direct (515) 440-1670 Email: becky@amysyoga.com</div><div>Billing Information: Amy's Yoga Studio</div><div>Bill To Company: Amy's Yoga Studio Billing Site: Studio 4</div><div>Billing Contact: 800 Main Street Ralston, NE 68127 United States</div><div>Agreement: Office 365 User Licenses</div><div>Agreement Name: Office 365 User Licenses Agreement Type: User Based + Start Date: Wed 01/22/2025 End Date: Set 02/28/2026 Location: Tampa Department: Admin SLA: ZCJ_ContractNumber: CW33799-01 ZCJ_CustomerNumber: ZCJ_InvoiceNumber: ZCJ_EASalesRep:</div><div>Opportunity: Customer PO: Cancel: Cancellation Reason:</div><div><div>Invoicing Recap</div><table><tr><td>Active</td><td>Last Invoice Date:</td><td>03/01/2025</td></tr><tr><td>Unlimited</td><td>Last Invoice Number:</td><td>72947</td></tr><tr><td>0.00</td><td>Last Invoice Amount:</td><td>\$620.00</td></tr></table></div></div></div>								Active	Last Invoice Date:	03/01/2025	Unlimited	Last Invoice Number:	72947	0.00	Last Invoice Amount:	\$620.00
Active	Last Invoice Date:	03/01/2025														
Unlimited	Last Invoice Number:	72947														
0.00	Last Invoice Amount:	\$620.00														

EA Field	CW Field	Inserts	Updates	Notes
<i>Item Details</i>				
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

Equipment/Item * Miscellaneous Item limits Custom properties

☐ Equipment ☒ Item

*Item number: 1 Office365 - Office365

Make and model: ---

Description: 2 Office365

Serial number: ---

Quantity: 3 5

Unit base rate: 4 \$75.00

Base rate: 5 \$375.00 for one month

*Start coverage date: 6 2/ 1/2025

*Start base billing date: 6 2/ 1/2025

End coverage date: 7 2/28/2026

End base billing date: 7 2/28/2026

Termination code: ---

☐ Inherit distribution code from Installment based billing tab

☒ Use standard distribution ☐ Use custom distribution

*Base distribution code: 8 MSP Contracts - MSP Contracts

Bill code: 9 MITInclusive - MIT All Inclusive Agreements

SLA code: ---

*Tax codes: 10 BA1 - Bartow Cty Taxable

☒ Override taxable 11 ☐ Taxable

Exempt code: ---

*Branch: 12 Branch 102 - Branch 102

Location: ---

*Customer: 13 AY02 - Amys Yoga Studio

Amys Yoga Studio (AY02)
220 Mills Civic Parkway 123
Des Moines, MN 5026612345
USA

Remarks: ---

Base billed through: 2/28/2025
Base billed through:** 2/28/2025
Base period:** 3/1/2025 - 3/31/2025

**Contract date vs. equipment date

[View base billing schedule](#)

Cycle: Monthly
Base: \$375.00

Agreement Additions 3 Attachments 0 Invoices 2 Adjustments 0 Agreements 0 Work Roles 1

< + [Icons] History [Icon]

Additions

Product ID: 1 * Office365 Sequence: 3.00

Description: Office365 Bill Customer: * Billable

Total Quantity: 5 Invoice Group: ---

Less Included: 0 UOM: Each

Quantity to Bill: 3 Ext Price: 5 375.00

Unit Price: 4 75.00 Ext Cost: 50.00

Unit Cost: 10.00 Margin: 325.00

☐ Taxable

Effective Date: 6 Mon 02/03/2025

Cancelled Date: 7

Serial Number: ---

Opportunity: ---

ZCJ_EALocation: 8

Product Invoice Description: 2 Office365

☐ Drop Ship

☐ Special Order

☐ Purchase Item

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.

Customer: **Amys Yoga Studio** 1

Service calls:

Invoice	Cleared	Call number	Equipment/Item	Description	Serial number	Make
<input checked="" type="checkbox"/>	Yes	CW148981 7...	CW-Service	ConnectWise		

Call: CW148981 72923 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 #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

☐ CustomField1 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:

Item:

Ticket Owner: 7 Amy Wickett

CustomField1:

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

Assigned By: Amy Wickett

Closed By: Amy Wickett Fri 01/03/2025 at 3:02 PM UTC-06

Customer PO: 9

Reference:

Est. Time Rev: 0.00 USD

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: **1** Assist

*Activity code: **2**

Dates and Times:

Dispatched:

Arrival: **3**

Departure: **4**

Odometer reading

Beginning:

Ending:

Mileage:

Labor rates

5

Billing entries

6

Amount: **\$0.00**

*Tax as:

Overview

Company: _____

Date: * Thu 12/26/2024 ☐ Overnight

Work Role: * Consultant ▼

Agreement: User Based +/-Testing Agreement Group Bill - Copy ▼

Mark as Done

Member: * Amy Wickett

Location: * Tampa

Department: * Help Desk

Ticket Status: * >Closed

Add notes to:
☒ Discussion ☐ Internal ☒ Resolution

Billing Options

Hourly Rate: _____ 125.00 USD ①

Overage Rate: _____ USD

Total Hours: _____ 2.00

Applied Hours: _____ 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: * Regular ②

Billable: * Billable

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

☒ 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.

Entered on 12/27/2024 4:11 PM by CJID965
 Updated on 12/27/2024 4:11 PM by CJID965

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 Order: **LA00049481** Department: **Help Desk**

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

Mark as Done

Add notes to:

☒ Discussion ☐ Internal ☒ Resolution **1**

Billing Options

Time Details

Start Time	End Time	Deduct	Actual Hrs	Work Type	Billable
8:00 AM	10:00 AM	0.00	2.00	Regular	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.

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.

Customer: **Amy's 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)

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

☐ Equipment

☒ Item

Item number: ³ CW-Service - ConnectWise

*Location: ⁴ AY02 - Amy's 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: Amy's Yoga Studio ¹

Company: Amy's Yoga Studio Site: Main

Contact: ⁵ Address 1: 900 Main

Ticket: Address 2:

Email: City:

☐ CustomField1 State:

CustomField2: Zip:

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:

CustomField1: Due Date:

CustomField2: Duration:

ZCJ_CustomerNumber: Priority: ☒ Priority 3 - Medium

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: 12/26/2024 9:00 AM 


Arrival: **3** 12/26/2024 9:00 AM  


Departure: **4** 12/26/2024 11:00 AM 


Odometer reading 


Beginning: 


Ending: 


Mileage: 


Labor rates 


5 Regular: 


Overtime: 

Billing entries 


Labor hours: **6** 

Overtime hours: 

Travel hours: 

Billable mileage: 

Amount: **\$0.00**

*Tax as: LABOR - Standard Labor Tax 

Overview

Company: _____

Date: * Thu 12/26/2024 ☐ Overnight

Work Role: * Consultant ▼

Agreement: User Based +/-Testing Agreement Group Bill - Copy ▼

Mark as Done

Member: * Arny Wickett

Location: * Tampa

Department: * Help Desk

Ticket Status: * >Closed

Add notes to:
☒ Discussion ☐ Internal ☒ Resolution

Billing Options

Hourly Rate:	_____	125.00 USD ⓘ
Overage Rate:	_____	USD
Total Hours:	_____	2.00
Applied Hours:	_____	2.00 ⓘ
Invoice Hours:	_____	2.00

Time Details

Start Time: ⓘ	End Time: ⓘ	Deduct:	Actual Hrs:	Work Type: * ⓘ	Billable: *
8:00 AM ⌚	10:00 AM ⌚	0.00	2.00	Regular	Billable ▼

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

☒ 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)

Entered on 12/27/2024 4:11 PM by CJID965
Updated on 12/27/2024 4:11 PM by CJID965

WORK ORDER: Consultant

Department: Help Desk

Agreement: User Based +/Testing Agreement Group Bill - Copy

Ticket Status: >Closed

Mark as Done

Add notes to:
☒ Discussion ☐ Internal ☒ Resolution 1

Billing Options

Time Details

Start Time: 8:00 AM 1

End Time: 10:00 AM 1

Deduct: 0.00

Actual Hrs: 2.00

Work Type: Regular 1

Billable: Billable 1

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.



A.I. FOR YOUR DEALERSHIP

ID912 Move Call from EA to 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.

Customer: Krause Consulting, LLC ¹ Date: 1/29/2024 Work order number: 513

Service call * Billing information * Work order remarks

Call number	Equipment/Item	Description	Serial number	Make	Model
SC704582	CW-Service	ConnectWise			

Call: SC704582

☐ Equipment
☒ Item

Item number: CW-Service - ConnectWise

*Location: KC07 - Krause Consulting, LLC

Contract: ³ CW32305-01 - Type 128

Problem description: CW Ticket#: 148749 | New computer setup

Caller contact: LK77 - Laurie Krause

Caller: ² Laurie Krause -- 800-555-1234 -- laurie@krausec

SLA code: SLA COMPANY-240

*Call type: Network - Network Support by H

*Priority: 8 - Priority 8

*Technician: ⁴ CWTech - CW Convert

Call received at: 1/29/2024 2:27 PM

Due by: 1/30/2024 9:27 AM

Start time - est.: 1/30/2024 9:27 AM

Duration - est.: 01:00

PO number: 1992668

Bill code: MITInclusive - MIT All Inclusive A

Job:

On Hold

ON HOLD!
CALL
MOVED
TO
CW

Company: Krause Consulting, LLC

Company: * Krause Consulting, LLC ¹

Contact: Laurie Krause ²

Ticket: (800) 555-1234

Email:

CustomField2:

Site: Main

Address 1: 100 Main Street

Address 2:

City: Prior Lake

State: MN

Zip: 55372

Country: United States

Ticket #148749

Board: ³ From EA

Status: ⁴ NEW

Type: ⁵ From EA

Subtype:

Item:

Ticket Owner: ⁹ (Unassigned)

CustomField1:

CustomField2:

ZCJ_CustomerNumber:

SLA: No SLA

Agreement: ⁶ User Based +/-Krause - MNS Plan

Predecessor:

Estimated Start Date:

Due Date:

Duration:

Impact/Urgency: ⁷ Medium/Medium

Priority: ⁸ Priority 4 - Low

SLA Status: SLA Status Not Set

ID966 Sales Order Sync

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

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

☒ Hide canceled line items

Line ¹	Item ²	Description ³	Quantity ⁴	Canceled	On hand (Al...	UM	Price ⁵	
1	13530347	Microsoft Windows Remote Des...	1	0	2	EA	\$5,000.00	\$5
1.1	**ErrorItem	12RRDLKFJASKDJFE : New lic...	1	0	0	EA	\$0.00	
1.2	1G100F	1G100F One (1) Span Digital T1...	1	0	0	EA	\$1,666.00	\$1

Order	Products 3	Attachments 0	Invoices 0	Conversions 0	Configurations 0	Finance	Aud
+	Actions	SEARCH	CLEAR				
<input type="checkbox"/>	¹ Sequence	² Product ID	³ Description	⁴ Quantity	⁵ Unit Price	Bill	D
<input type="checkbox"/>	1.00	<u>13530347</u>	Microsoft Windows Remote Desktop Services 201...	1.00	\$5,000.00	B	
<input checked="" type="checkbox"/>	1.10	<u>12RRDLKFJASLKDJFE</u>	New license	1.00	\$0.00	B	
<input type="checkbox"/>	1.20	<u>1G100F</u>	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


1 Ship to: AB57 - Analytics by Emily LLC
2 100 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

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

4 Ship method: UPSGND - UPS Ground

Charge method: Credit Card/ACH ☐ Auth on OK

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: 2
ZCJ_ShipMethod: 3

Shipping Site: * Main 1
100 State Street
West Lafayette, IN 12345
United States