

**ID964 Contract Sync**

EA Field	CW Field	Inserts	Updates	Notes
<i>Contract 'Header' Fields</i>				
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	Not touched	Once billed in CW, the company on the agreement can not be changed. In you change the customer on the contract in EA, that should stick on subsequent updates.
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 <sup>1</sup> Rev: 01

Customer: AY02 - Amys Yoga Studio <sup>2</sup>

Contract type: Type 128 - Type 133 <sup>3</sup>  Renewable

Contract bill code: MITInclusive - MIT All Inclusive Agreements <sup>4</sup> Renewal cycle:

Status: Active - Active contract for the date range <sup>5</sup>

Installation based billing <sup>6</sup> Billing method: Installation based <sup>7</sup> Start date: 1/22/2025 <sup>8</sup> Expiration date: 2/28/2026 <sup>9</sup>

Base rates

Billing cycle: Monthly - Monthly <sup>10</sup>

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

Bill base rate in arrears  Bill base in advance: 0 Month

Use contract base rate  Use equipment base rates  <sup>11</sup>

Base rate: \$620.00 <sup>12</sup> for: 1 Month

Use standard distribution  Use custom distribution

Base distribution code: MSP Contracts - MSP Contracts <sup>13</sup>

View base billing schedule <sup>14</sup>

Cycle: Monthly Base: \$620.00

Use base cycle consolidation

Billed through: Friday, February 28, 2025

Billing on: Saturday, March 1, 2025

Activated on: 1/22/2025 <sup>15</sup> Terminated on: 2/3/2025 <sup>16</sup> Termination code:  <sup>17</sup>

Renewed/Revised: 2/3/2025  <sup>18</sup> Renew/Revise

Company: Amys Yoga Studio <sup>2</sup>

Company: \* Amys Yoga Studio <sup>2</sup> Site: Main

Contact: \* Becky Frahm <sup>2</sup> 220 Mills Civic Parkway  
Des Moines, MN 502661  
United States

Direct (515) 440-1670

Email: becky@amysyoga.com

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
72947	3/1/25	\$620.00	Closed	Agreement	3	2025
72946	2/3/25	\$1,380.00	Closed	Agreement	2	2025

Agreement: Office 365 User Licenses

Agreement Name: \* Office 365 User Licenses <sup>7</sup> Oppor: 72947

Agreement Type: \* User Based + <sup>3</sup> Custoi: 72946

Start Date: \* Wed 01/22/2025 <sup>4</sup>

End Date: \* Sat 02/28/2026 <sup>4</sup>  No End Date

Location: \* Tampa  Restrict

Department: \* Admin  Restrict

SLA:

ZCJ\_ContractNumber: CW33799-01 <sup>1</sup>

Cancellation Reason:

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

The screenshot displays a software interface for contract management. The main window is titled 'Company: Amys Yoga Studio' and contains several sections:

- Contact Information:** Name: Amy, Phone: (515) 440-1670, Email: becky@amysyoga.com. Address: 220 Mills Civic Parkway 123, Des Moines, MN 5026612345, United States.
- Billing Information:** Billing To Company: Amys Yoga Studio, Billing Site: Studio 4, Billing Contact: 800 Main Street, Ralston, NE 68127, United States.
- 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, Location: Tampa, Department: Admin.
- Contract Fields:** Bill to: AY02-001 - Studio 4, 800 Main Street, Ralston, NE 68127. Branch: Branch 102 - Branch 102. Tax code: BA3 - Bartow Cty Gov't. Billing group: CW Agreements - CW Agreements. Taxable: [checked]. Use equipment tax codes: [checked]. Terms: C - C.O.D. Sales rep: MAK - Bob Number 238. Report group: CW Details - CW Details.

An 'Invoicing Recap' window is open in the bottom right corner, showing:

Active	Last Invoice Date:	Customer PO:
Unlimited	03/01/2025	72947
0.00	Last Invoice Number: 4	\$620.00
	Last Invoice Amount:	

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 [View item coverage](#)

SLA code: ---

\*Tax code: 10 BA1 - Bartow Cty Taxable

Override taxable 11  Taxable

Exempt code: ---

\*Branch: 12 Branch 102 - Branch 102

Location: ---

13 \*Customer: 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

< + [ ] [ ] [ ] [ ] History [ ] [ ]

**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  Drop Ship

Cancelled Date: 7  Special Order

Serial Number: ---  Purchase Item

Opportunity: ---

ZCJ\_EALocation: 8

Product Invoice Description: 2 Office365