

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****

1 Name: Amys Yoga Studio
2 Customer type: [dropdown]
3 Address: 220 Mills Civic Parkway 123
4 City: Des Moines
5 State: MN
6 Zip: 5026612345
7 Phone 1: 5154401669
8 Fax: [field]
9 Website: www.amysyoga.com
10 Sales rep: AMW1 - Amy Wickett

Company: Amys Yoga Studio
2 Company: * Amys Yoga Studio
3 Address: 220 Mills Civic Parkway 123, Des Moines, MN 5026612345, United States
4 Phone: (515) 440-1669
5 Fax: [field]
6 Web Site: www.amysyoga.com
7 ZCJ_SalesRepName: Amy Wickett
8 ZCJ_SalesRepEmail: amy@domain.com
1 Company ID: * AY02
4 Address 1: 100 North Ashworth
5 City: Hampton Beach
6 State: New Hampshire
7 Zip: [field]

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 Sub-Total	Yes	Yes	Updated each month to match the invoice pre-tax 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 133 ³ Renewable

Contract bill code: MITInclusive - MIT All Inclusive Agreements ⁴ Renewal cycle:

Status: Active - Active contract for the date range ⁵

Billing method: **Installation based** ⁶ Start date: 1/22/2025 ⁷ Expiration date: 2/28/2026 ⁸

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 ¹¹

Base rate: \$620.00 ¹² for: 1 Month

Use standard distribution Use custom distribution

Base distribution code: MSP Contracts - MSP Contracts ¹³

[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

¹⁴ Activated on: 1/22/2025 ¹⁵ Terminated on: 2/3/2025 ¹⁶ Termination code:

Renewed/Revised: 2/3/2025

¹⁷ This contract will bill to customer 'Studio 4'.

Company: Amys Yoga Studio

Company: * Amys Yoga Studio ² Site: Main

Contact: * Becky Frahm ³ 220 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

Agreement Type: * User Based +

Start Date: ³ Wed 01/22/2025

End Date: ⁴ Sat 02/28/2026 No End Date

Location: * Tampa Restrict

Department: * Admin Restrict

SLA:

ZCJ_ContractNumber: CW33799-01 ¹

Oppor: 72947

Custo: 72946

Cancellation Reason:

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.

The screenshot displays a software interface for contract management. It features several tabs at the top: "Installation based billing", "Equipment/Item", "Miscellaneous", "Billing/Contact", "Item limits", "Custom properties", "Messages", and "Remarks". The "Billing/Contact" tab is active, showing details for "Company: Amys Yoga Studio".

Key fields and callouts in the interface include:

- 1**: "Bill to" address field (AY02-001 - Studio 4, 800 Main Street, Ralston, NE 68127).
- 2**: "Branch" dropdown menu (Branch 102 - Branch 102).
- 3**: "Bill contract" checkbox (checked).
- 4**: "Billing group" dropdown menu (CW Agreements - CW Agreements).
- 5**: "Tax code" dropdown menu (BA3 - Bartow Cty Gov't).
- 6**: "Taxable" checkbox (unchecked).
- 7**: "Use equipment tax codes" checkbox (checked).
- 8**: "Terms" dropdown menu (C - C.O.D.).
- 9**: "Sales rep" dropdown menu (MAK - Bob Number 238).
- 10**: "Report group" dropdown menu (CW Details - CW Details).
- 11**: "Contact" information (Name: Amy, Phone: (515) 440-1670, Email: becky@amysyoga.com).
- 12**: "Blanket PO" field.

Additional sections include "Billing Information" (Amys Yoga Studio), "Agreement: Office 365 User Licenses" (Office 365 User Licenses, User Based +, Start Date: Wed 01/22/2025, End Date: Sat 02/28/2026), and an "Invoicing Recap" table.

Active	Last Invoice Date:	
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	Yes	Pulled from the EA item record	Pulled from the EA item record
9 Bill code	NA	Yes	Not touched	Pulled from EA contract record
10 Tax code	NA	Yes	Not touched	Pulled from EA customer record
11 Override Taxable	NA	Yes	Yes	
12 Branch	NA	Yes	Not touched	Pulled from EA customer record
13 Location customer	8 ZCJ_EALocation	Yes	Yes	The custom field ZCJ_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
<input type="checkbox"/> Taxable	<input type="checkbox"/> Drop Ship
Effective Date: 6 Mon 02/03/2025	<input type="checkbox"/> Special Order
Cancelled Date: 7	<input type="checkbox"/> Purchase Item
Serial Number: ---	
Opportunity: ---	
ZCJ_EALocation: 8	
Product Invoice Description: 2	

Office365

ID965 Service Ticket 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 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 72923	CW-Service	ConnectWise		

Call: CW148981 72923 (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 - 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

Contact: (5) Becky Frahm

Ticket: (5) (515) 440-1669

Email: becky@amysyoga.com

CustomField2:

Site: Main

Address 1: 220 Mills Civic Parkway 123

Address 2:

City: Des Moines

State: MN

Zip: 5026612345

Country: United States

Ticket #148981 (2)

Board: * Help Desk

Status: * >Closed

Type: (6) Network

Subtype:

Item:

Ticket Owner: (7) Amy Wickett

CustomField1:

SLA: No SLA

Agreement: (3) User Based +/-Testing Agreement Group Bill - Copy

Predecessor:

Estimated Start Date:

Due Date:

Entered By: (8) Amy Wickett Notify
 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
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 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

5 Regular: \$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

Mark as Done Add notes to: Discussion Internal Resolution

Billing Options

Hourly Rate: 5 125.00 USD 1

Overage Rate: USD

Total Hours: 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
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) 1 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 note: Labor Entry 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 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.

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

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:

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:

Additional Details

Opportunity: Entered By: Amy Wickett Notify 8 Tue 10/29/2024 at 1:14 PM UTC-05

Source: Email Connector

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: 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)
 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)

work note: Laboration 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: * Billable: *
 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.

ID912 Move Call from EA to CW

EA Field	CW Field	Notes
<i>Service Call 'Header'</i>		
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

Company: Krause Consulting, LLC

Company: * Krause Consulting, LLC 1

Contact: Laurie Krause 2

Ticket: (800) 555-1234

Email: CustomField1

CustomField2:

Ticket #148749

Board: 3 From EA

Status: 4 NEW

Type: 5 From EA

Subtype:

Item:

Ticket Owner: 9 (Unassigned)

CustomField1:

CustomField2:

ZCJ_CustomerNumber:

* 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!
CALL
MOVED
TO
CW

On Hold

Site: Main

Address 1: 100 Main Street

Address 2:

City: Prior Lake

State: MN

Zip: 55372

Country: United States

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: 8 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	ZCJ_Warehouse	Can be specified with a custom field in CW, otherwise, the default set in the ID966 variables.
9 Department	NA	Blank unless specified in the variables
10 Status	NA	Pulls from default set in variables

The screenshot displays a CRM interface for a sales order. On the left, a form contains the following fields with red callouts: Customer (2) BA11 - Becca's Art Studio, Number (1) CW149, Date 1/29/2025, Due by 1/29/2025, Req. date 1/29/2025, Warehouse (8) 1 - Warehouse #1, Department (9) Open - Open, Status (10) Open - Open, Order Type (4) Other - Other Order, Sales rep (5) AMW1 - Amy Wickett, PO number (6), Ordered by (6), and Branch (7) Test - Test. A central summary box shows: Items total: \$3,652.83, Discount: \$0.00, Sub total: \$3,652.83, Freight: \$0.00, Total: \$3,652.83. A warning message states: 'This customer has exceeded their credit limit of \$345,151.10.' The right side of the interface shows a 'Sales Order #149' card with company details for Becca's Art Studio (100 Main Street, Cincinnati, OH 12345, United States) and order details: Status: Synced, DO NOT EDIT; Order Date: Wed 01/29/2025; Opportunity (3); Customer PO (5); Location: Tampa; Department: Admin; Sales Rep (4) Amy Wickett. A summary table at the bottom right shows: 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 Custom properties Remarks

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 \$5
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 \$1,

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
<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 Custom properties 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 Site: * Main 1
Shipping Contact: 2
100 State Street
West Lafayette, IN 12345
United States
ZCJ_ShipMethod: 3