

ID890 | Servicing Dealer Sync

Setup & Operations Overview

RUN SCHEDULE
Every 10 minutes

OUTPUT TYPE
Email & Data Push

VERSION
v1.1

1 What is ID890?

ID890 is a service call sync between two Office Technology companies that both use **e-automate** and **CEOJuice**. When a customer places a service call, ID890 automatically creates that call in the Servicing Dealer's e-automate, keeps statuses in sync as the call moves through dispatch and close, and pushes meter readings and a parts note back to the Selling Dealer — all without manual re-entry.

Customer calls in	Selling Dealer creates a service call in their e-automate.
Auto-create	ID890 detects the equipment is linked to a Servicing Dealer and creates the call in that dealer's e-automate.
Dispatched	When the Servicing Dealer dispatches the call, the Selling Dealer's call is automatically updated to Dispatched .
In progress	Notes added by either dealer can be configured to sync between both calls.
Closed	When the Servicing Dealer closes the call, the Selling Dealer's call closes — with meters and a parts note included.

SHIP OUT

Equipment **sold by you**, serviced by another dealer. You create the call; the Servicing Dealer works it.

SHIP IN

Equipment **sold by another dealer**, serviced by you. The Selling Dealer creates the call; your team works it.

2 Setup checklist

Complete all four steps below before going live. CEOJuice will validate your e-automate configuration against the checklist before activating the sync.

Step 1 — Checklist	Access the ID890 checklist at www.ceojuice.com (click Checklist in the top-right corner). Complete it with an e-automate admin who has permissions to add Lists & Codes.
Step 2 — Custom properties	Create two custom properties in e-automate under Tools → Lists & Codes : ZCJ_DealerNumber (Text Box, added to Customer and Employee configs) and ZCJ_ITTEquipmentNumber (Text Box, added to Equipment config — required only when serial numbers are not unique).

Step 3 — Codes	Create or confirm these codes exist in e-automate: Activity Code, Note Type, Call Priority, Meter Source, Call Type (ShipIn and ShipOut), Cancel Code, and On-Hold Code. Dedicated ITT-specific codes are strongly recommended so dispatch can identify these calls at a glance.
Step 4 — Records	For each partner dealer, create a Customer Record , a Technician Employee Record , and set the ZCJ_DealerNumber and ZCJ_DealerInitDate custom properties on both. Equipment records must also be configured — see Section 3.

3 Equipment record rules

Ship Out equipment (you sold it)	Assign the Servicing Dealer's Technician Record to the Equipment Record. Do not set a BillTo of the other dealer on this record.
Ship In equipment (you service it)	Set the BillTo on the Equipment Record to the Selling Dealer. Do not assign the other dealer as a technician on this record.
Serial # not unique	Populate ZCJ_ITTEquipmentNumber on the Equipment Record with the other dealer's equipment number. The partner dealer must do the same on their side.

Important. Never set the Servicing Dealer as both Technician and BillTo on the same equipment record — this will cause syncing failures.

4 Meter sync

Meter readings flow **one direction only**: Servicing Dealer → Selling Dealer. **Variable 6** on the subscription controls what is synced.

Variable 6 = 0	Sync both service calls and meter readings (most common).
Variable 6 = 1	Sync service calls only — no meter readings.
Variable 6 = 2	Sync meter readings only — no service calls.

Both dealers' meter type **Categories** must match for readings to sync. If a machine has more than one meter per category (e.g., Canon color equipment), the reading is added as a note rather than a meter entry.

5 Common errors & fixes

Error	Likely cause	How to fix
Meter Type Not Found	Servicing Dealer sent a meter reading, but the Selling Dealer's equipment record lacks that Meter Type.	Agree with your partner dealer on which meter types to sync and configure them on both sides.
Transaction from Unauthorized Sender	Receiver's Variable W does not include the sender's CEOJuice customer number, or ZCJ_DealerNumber is missing on the Customer or Technician record.	Add the sender's CEOJuice # to Variable W and confirm ZCJ_DealerNumber is populated on both the Customer and Employee records.
Equipment Not Found	Serial number mismatch, inactive equipment record, or equipment doesn't exist on one side.	Confirm the serial number matches exactly on both sides and that the equipment record is marked Active. Use ZCJ_ITTEquipmentNumber for non-unique serials.
Equipment Not Configured	ShipIn is missing BillTo of the Selling Dealer, or ShipOut is missing technician assignment of the Servicing Dealer.	Review Section 3. Set the correct BillTo <i>or</i> Technician on the Equipment Record — not both.
Call Already Invoiced	Receiver has already invoiced the service call; changes can no longer sync.	Only one dealer should invoice — typically the Servicing Dealer. Contact the receiver to resolve discrepancies manually.

6 Testing & go-live

CEOJuice recommends testing on a **single dealer / single equipment record** before enabling the sync broadly. Both parties should participate in the test.

1	Both dealers agree on one serial number / equipment record to use as the test.
2	Complete all setup from Sections 2–4 for that record.
3	ShipOut Dealer enters a test service call on that equipment.
4	ShipIn Dealer confirms the call appears, dispatches it, adds a note, and closes the call with meters.
5	ShipOut Dealer verifies that status, meters, and notes synced correctly within the run cycle.
6	Once satisfied, expand to additional equipment records.