Sage 300 + FollowupCRM
Data syncing capabilities

Customer Management	Read	Write
Customers (AR Customers)	✓	✓

Financials Management	Read	Write
AP Invoices	✓	✓
AP Payments	✓	✓
AR Invoices	✓	✓
AR Payments (AR Cash Receipts)	✓	
Assets (Equipment)	✓	
Bank Accounts (Cash Management Accounts)	✓	
Budget Line Items (JC Estimates)	✓	✓
Change Orders	✓	✓
Cost Codes (Phases)	✓	✓
Cost Types	✓	
Employees	✓	
Expenses	✓	✓
Items (Materials)	✓	
Job Costs	✓	
Ledger Accounts	✓	
Ledger Journals	✓	
Ledger Journal Entries	✓	✓
Prime Contracts (Job Contracts)	✓	
Purchase Orders	✓	
Purchase Order Compliances	✓	✓
Subcontracts	✓	✓
Subcontract Claims	✓	✓
Subcontract Compliances	✓	✓
Timecard Entries	✓	✓
Vendor Compliances	✓	✓

Project Management	Read	Write
Contacts	✓	
Drawings (Drawing Logs)	Available via Pass-through	
Issues	Available via Pass-through	
Projects (Jobs)	✓	✓
RFIs	Available via Pass-through	
Submittals	Available via Pass-through	
Transmittals	Available via Pass-through	
Vendors (AP Vendors)	✓	✓

Pass-Through Requests	Read	Write
More Viewpoint Spectrum data (without unified model)	✓	

FollowupCRM

Top Use Cases

Connecting Projects (in Followup CRM) to Jobs (in Sage 100)

- ✅ Push a Project as a new Job to Sage 300
- ✅ Pull an existing Job on Sage 300 and connect it to a Project on Followup CRM that is not already linked to a Job on Sage 300
- ✅ Push updates from a Project on Followup CRM to a connected Job on Sage 300
- ✅ Sync updates from a Job on Sage 300 to the connected project on Followup CRM
- ✅ Sync Change Order
- ✅ Pull Income Cost Summary

Connecting Companies & Contacts (in Followup CRM) to Clients (in Sage 300)

- ✅ Push a Company and Contact as a new Customer
- ✅ Pull an existing Customer on Sage 300 and connect it to a Company + Contact on Followup CRM that is not already linked to a Customer on Sage 300
- ✅ Push updates from a Company and Contacts on Followup CRM to a connected Customer on Sage 300
- ✅ Sync updates from a Customer on Sage 300 to the connected Company and Contacts on Followup CRM

Connecting Residential Contacts (in Followup CRM) to Clients (in Sage 300)

- ✅ Push a Residential Contact as a new Contact to Sage 300
- ✅ Pull an existing Contact on Sage 300 and connect it to a Residential Contact on Followup CRM that is not already linked to a customer on Sage 300
- ✅ Push updates from a Residential Contact on Followup CRM to an already connected Contact on Sage 300
- ✅ Sync updates from a Contact on Sage 300 to the connected Contact on Followup CRM