

Data syncing capabilities

| Customer Management | Read | Write |
|--|----------------------------|-------|
| <u>Customers (AR Customers)</u> | ✓ | ✓ |
| Financials Management | Read | Write |
| <u>AP Invoices</u> | ✓ | ✓ |
| <u>AP Payments</u> | ✓ | ✓ |
| <u>AR Invoices</u> | ✓ | ✓ |
| <u>AR Payments (AR Cash Receipts)</u> | ✓ | |
| <u>Assets (Equipment)</u> | ✓ | |
| <u>Bank Accounts (Cash Management Accounts)</u> | ✓ | |
| <u>Budget Line Items (JC Estimates)</u> | ✓ | ✓ |
| <u>Change Orders</u> | ✓ | ✓ |
| <u>Cost Codes (Phases)</u> | ✓ | ✓ |
| <u>Cost Types</u> | ✓ | |
| <u>Employees</u> | ✓ | |
| <u>Expenses</u> | ✓ | ✓ |
| <u>Items (Materials)</u> | ✓ | |
| <u>Job Costs</u> | ✓ | |
| <u>Ledger Accounts</u> | ✓ | |
| <u>Ledger Journals</u> | ✓ | |
| <u>Ledger Journal Entries</u> | ✓ | ✓ |
| <u>Prime Contracts (Job Contracts)</u> | ✓ | |
| <u>Purchase Orders</u> | ✓ | ✓ |
| <u>Purchase Order Compliances</u> | ✓ | ✓ |
| <u>Subcontracts</u> | ✓ | ✓ |
| <u>Subcontract Claims</u> | ✓ | ✓ |
| <u>Subcontract Compliances</u> | ✓ | ✓ |
| <u>Timecard Entries</u> | ✓ | ✓ |
| <u>Vendor Compliances</u> | ✓ | ✓ |
| Project Management | | |
| <u>Contacts</u> | ✓ | |
| <u>Drawings (Drawing Logs)</u> | Available via Pass-through | |
| <u>Issues</u> | Available via Pass-through | |
| <u>Projects (Jobs)</u> | ✓ | ✓ |
| <u>RFIs</u> | Available via Pass-through | |
| <u>Submittals</u> | Available via Pass-through | |
| <u>Transmittals</u> | Available via Pass-through | |
| <u>Vendors (AP Vendors)</u> | ✓ | ✓ |
| Pass-Through Requests | Read | Write |
| <u>More Viewpoint Vista data (without unified model)</u> | ✓ | |



Top Use Cases

Push a Project (in Followup CRM) to the Bid Board (in ProcCore)

- ✓ From the Project Page, user click "Push to Bid Board"
- ✓ User receives a Confirmation Message that the Project is a new ProcCore Bid Board Project
- ✓ User can select to push any associated documents to the new ProcCore Bid Board Project
- ✓ Both Projects are linked in Followup CRM and ProcCore

Pull a Project from the Bid Board (Before the Project is connected)

- ✓ User clicks "Sync from Bid Board"
- ✓ Search for the ProcCore Bid Board Project using the Project name or number
- ✓ User can select to pull any associated documents to the new ProcCore Bid Board Project
- ✓ Both Projects are linked in Followup CRM and ProcCore

Push a Won Project (from Followup CRM) as a Regular Project (to ProcCore)

- ✓ User clicks "Create Project"
- ✓ Project will get pushed to ProcCore as a new ProcCore Project
- ✓ User can select to push any associated documents to the new ProcCore Project
- ✓ Both Projects are linked in Followup CRM and ProcCore

Pull a Regular Project (from ProcCore) to Followup CRM

- ✓ User clicks "Sync from Project"
- ✓ User searches for the ProcCore Project using the Project name or number
- ✓ User can select to pull any associated documents from the ProcCore Project
- ✓ Both Projects are linked in Followup CRM and ProcCore