

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	Read	Write
<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 Spectrum data (without unified model)</u>	✓	

Top Use Cases

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

- ✓ Push a Project as a new Job to Sage 100
- ✓ Pull an existing Job on Sage 100 and connect it to a Project on Followup CRM that is not already linked to a Job on Sage 100
- ✓ Push updates from a Project on Followup CRM to a connected Job on Sage 100
- ✓ Sync updates from a Job on Sage 100 to the connected project on Followup CRM
- ✓ Pull Income Cost Summary

Connecting Companies & Contacts (in Followup CRM) to Clients (in Sage 100)

- ✓ Push a Company and Contact as a new Customer
- ✓ Pull an existing Customer on Sage 100 and connect it to a Company + Contact on Followup CRM that is not already linked to a Customer on Sage 100
- ✓ Push updates from a Company and Contacts on Followup CRM to a connected Customer on Sage 100
- ✓ Sync updates from a Customer on Sage 100 to the connected Company and Contacts on Followup CRM

Connecting Residential Contacts (in Followup CRM) to Clients (in Sage 100)

- ✓ Push a Residential Contact as a new Contact to Sage 100
- ✓ Pull an existing Contact on Sage 100 and connect it to a Residential Contact on Followup CRM that is not already linked to a customer on Sage 100
- ✓ Push updates from a Residential Contact on Followup CRM to an already connected Contact on Sage 100
- ✓ Sync updates from a Contact on Sage 100 to the connected Contact on Followup CRM