

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 Spectrum)

- ✓ Push a Job to Spectrum
- ✓ Sync a Job from Spectrum (a connected job)
- ✓ Update a Job in Spectrum from Followup CRM
- ✓ Sync from Spectrum (connecting a project with an existing job on Spectrum)
- ✓ Pull Income vs Cost

Connecting Companies & Contacts (in Followup CRM) to Customers (in Spectrum)

- ✓ How to push a Company + Contact as a New Customer on Spectrum
- ✓ How to pull an existing Customer on Spectrum to a Company on Followup CRM, and link them
- ✓ How to update/push the changes made on Followup CRM to a linked Spectrum customer
- ✓ How to pull changes on a Spectrum Customer that is already connected to a Company on Followup CRM
- ✓ How to push a Contact - different from the one that is already synced with Spectrum

Connecting Residential Contacts (in Followup CRM) to Customers (in Vista)

- ✓ How to push a Residential Contact as a new Customer on Spectrum
- ✓ How to pull an existing customer on Spectrum to a Residential contact on Followup and link them
- ✓ How to update/push the changes made on a residential contact on Followup to a linked Spectrum customer
- ✓ How to pull changes on a spectrum customer that is already connected to a residential contact on Followup on to the followup residential contact