

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>Sub Job (Phases)</u> | ✓ | |
| <u>Tax Codes</u> | ✓ | |
| <u>Timecard Entries</u> | ✓ | ✓ |
| Project Management | Read | Write |
| <u>Contacts</u> | Available via Pass-through | |
| <u>Projects (Jobs)</u> | ✓ | ✓ |
| <u>Vendors</u> | ✓ | |
| <u>Vendors Compliances</u> | Available via Pass-through | |
| Pass-Through Requests | Read | Write |
| <u>More Foundation data (without unified model)</u> | ✓ | |

⚠ Foundation J/C Change orders are read only;
Subcontract and PO Change Orders are read and write

Top Use Cases

Connecting Projects (in Followup) to Jobs (in Foundation)

Prerequisites: A Project contract can be pushed/synced in any sales status, but a contact must be attached

- ✓ Push a Project from Followup to create a Job in Foundation
- ✓ Pull an existing Job from Foundation into Followup CRM as a Project
- ✓ Update a Job in Foundation from Followup CRM
- ✓ Pull the Income Vs. Cost Summary from Foundation into Followup CRM
- ✓ Sync change orders from Foundation in Followup CRM

Connecting Companies (in Followup) to Customers (in Foundation)

- ✓ Push a New Company from Followup to create a Customer in Foundation
- ✓ Pull an existing Customer from Foundation into Followup CRM as a Company
- ✓ Update a Customer in Foundation from Followup CRM
- ✓ Replace only the contact info of a linked customer on Foundation

Connecting Residential Contacts (in Followup) to Customers (in Foundation)

- ✓ Push a Residential Contact from Followup CRM to create a Customer in Foundation
- ✓ Pull an existing Customer from Foundation into Followup CRM as a Residential Contact
- ✓ Update a Customer in Foundation from Followup CRM