

## 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