









































Project/Jobs Fields

Followup CRM Field Name	Maps with	Sage 300 CRE Field Name
Project Seq ID/Custom # Auto-generated Job # based on Sage 300 Job # (N/A to alphanumeric) Custom Field: Sage 300 Job Number		Job Number
Name		Name
Address		Address 1
City		City
State		State
Zip		Postal Code
Contract Type		Type
Sales Status		Status
Custom Field: Start Date		Estimated Start Date
Custom Field: Completion Date		Estimated Completion Date
Custom Field		Scope of work
Contract Amount		Amount

Company/Customer

Followup CRM Field Name	Maps with	Sage 300 CRE Field Name
Company ID		Customer Code
Customer Name		Customer Name
Type		Type
Address		Address 1
City		City
State		State
Zip		ZIP
Phone		Phone
Fax		FAX
Email		Email
Company Status		Status
Contact Fields		
Custom Field: Contact Code		Contact Code
Contact Name		Contact Name
Phone/Cell		Phone
Phone/Cell		Cellular
Email		E-mail

Residential Contact/Customer

Followup CRM	Maps with	Sage 300 CRE
Field Name		Field Name
Contact ID		Customer Code
Contact Name		Customer Name
Contact Type		Type
Address		Address 1
City		City
State		State
Zip		ZIP
Phone/Cell		Phone
Email		Email
Contact Status		Status