



Project/Projects

Followup CRM Field Name	Maps with	Sage Intacct Field Name
Name		Project Name (Text)
Products & Services		Project Category (Dropdown)
Project ID		Project ID (Text)
Project Comment		Description (Text)
<i>Record Details-Custom Fields Text</i>		Project Currency (Text)
Sales Status		Project Status (Dropdown)
<i>Project-Custom Fields Drop Down</i>		Status (Dropdown)
Pass Off to Production		Begin Date (Date)
<i>Project-Custom Fields Date</i>		End date (Date)
Base Bid		Projected Billing Amount (Number)
Contract Amount		Contract Amount (Number)
Labor Hours		Projected Duration (Hours) (Number)
Contract Type		Billing Type (Dropdown)
<i>Record Details-Custom Fields Text</i>		Sales Order Number (Text)
<i>Record Details-Custom Fields Text</i>		Purchase Order Number (Text)
Contract Amount		Purchase Order Amount (Number)
<i>Record Details-Custom Fields Text</i>		Purchase Quote Number (Text)

<i>Record Details-Custom Fields Dropdown</i>		Invoice With Parent (Dropdown)
<i>Project-Custom Fields Text</i>		Customer ID (Text)
Account Manager		Sales Contact (Text)
Client Profile		Project Type (Dropdown)
Estimator		Project Manager ID (Dropdown)
Office/Location		Department ID (Text)
Office/Location		Location ID (Dropdown)
<i>Project-Custom Fields Text</i>		Term (Text)
<i>Project-Custom Fields Text</i>		Reference Number (Text)
<i>Project-Custom Fields Text</i>		Eternal User Customer (Text)
Contract Amount		Projected Cost (Number)
<i>Project-Custom Fields Text</i>		Class ID (Text)
<i>Project-Custom Fields Drop Down</i>		Timesheet And Expense User Restrictions (Dropdown)
<i>Project-Custom Fields Drop Down</i>		Default Employee Expenses to Billable (Dropdown)
<i>Project-Custom Fields Drop Down</i>		Default AP And PO Entries to Billable (Dropdown)
<i>Project-Custom Fields Text</i>		GL Budget ID (Text)
<i>Record Details- Custom Fields Number Percentage</i>		Default Labor Rate or Fee Percent (Number)
<i>Record Details- Custom Fields Drop Down</i>		Labor Pricing Option (Dropdown)
<i>Record Details- Custom Fields Num Format</i>		Default Expense Rate or Fee Percent (Number)
<i>Record Details- Custom Fields Drop Down</i>		Expense Pricing Option (Dropdown)
<i>Record Details- Custom Fields Num Format</i>		Default AP and PO Rate or Fee Percent (Number)
<i>Record Details- Custom Fields Drop Down</i>		AP And PO Pricing Option (Dropdown)

Project Comment		Invoice Message (Text)
<i>Project-Custom Fields Text</i>		Invoice Currency Override (Text)
<i>Project-Custom Fields Text</i>		Attachment (Text)
<i>Project-Custom Fields Text</i>		ALN (Text)
<i>Project-Custom Fields Text</i>		Funded Name (Text)
<i>Project-Custom Fields Text</i>		Agency (Text)
<i>Record Details-Custom Fields Text</i>		Payer (Dropdown)
<i>Project-Custom Fields Text</i>		Other ID (Text)
<i>Project-Custom Fields Dropdown</i>		Assistance Provided (Dropdown)
<i>Record Details-Custom Fields Dropdown</i>		Revenue Restriction (Dropdown)
<i>Record Details-Custom Fields Text</i>		Restriction Expiration Years (Text)
<i>Record Details-Custom Fields Date</i>		First Restriction Expiration Date (Date)
<i>Project-Custom Fields Dropdown</i>		Time Satisfaction Scheduled (Dropdown)

Company/Customer

Followup CRM Field Name	Maps with	Sage Intacct Field Name
ID		Customer ID (Text)
Name		Customer Name (Text)
Name (Contact)		Display Contact Customer Name (Text)
Name		Display Contact Company Name (Text)
Title (Contact)		Display Contact Prefix (Text)
Name (Contact)		Display Contact First Name (Text)
Name (Contact)		Display Contact Last Name (Text)
Name (Contact)		Display Contact Middle Name (Text)
Name (Contact)		Display Contact Print As (Text)
<i>Custom Dropdown Field</i>		Display Contact Taxable (Dropdown)
<i>Custom Text Field</i>		Display Contact Tax Group (Text)
<i>Custom Text Field</i>		Display Contact Tax Solution (Text)
<i>Custom Text Field</i>		Display Contact Default Tax Schedule (Text)
<i>Custom Text Field</i>		Display Contact Tax ID (Text)
<i>Custom Text Field</i>		Display Contact SIRET (Text)
<i>Custom Text Field</i>		Display Contact Legal Category (Text)
<i>Company Type</i>		Display Contact Type of Company (Text)
<i>Custom Text Field</i>		Display Contact Main Activity (Text)
<i>Custom Number Field</i>		Display Contact Registered Capital (Number)

<i>Custom Text Field</i>		Display Contact VAT Regime (Text)
Phone		Display Contact Phone Number (Text)
Cell (Contact)		Display Contact Phone 2 (Text)
Cell (Contact)		Display Contact Mobile Phone (Text)
<i>Custom Text Field</i>		Display Contact Pager (Text)
Fax		Display Contact Fax (Text)
<i>Custom Date Field</i>		Display Contact No Label Specified (Date)
<i>Custom Dropdown Field</i>		Display Contact GST Registered (Dropdown)
<i>Custom Text Field</i>		Display Contact No Label Specified (Text)
<i>Custom Text Field</i>		Display Contact No Label Specified (Text)
Email (Contact)		Display Contact Email Address (Text)
Email (Contact)		Display Contact Secondary Email Address (Text)
Web Site		Display Contact URL (text)
Web Site		Display Contact URL 2 (text)
<i>Custom Dropdown Field</i>		Display Contact Visible (Dropdown)
Address		Display Contact Address Line 1 (Text)
Address		Display Contact Address Line 2 (Text)
Address		Display Contact Address Line 3 (Text)
City		Display Contact City (Text)
State		Display Contact State or Territory (Text)

Zip		Display Contact Zip or Postal Code (Text)
<i>Custom Text Field</i>		Display Contact Country (Text)
<i>Custom Dropdown Field</i>		Display Contact Country Code (Dropdown)
<i>Custom Number Field</i>		Display Contact Latitude (Number)
<i>Custom Number Field</i>		Display Contact Longitude (Number)
Status		Display Contact Status (Dropdown)
<i>Custom Text Field</i>		Term (Text)
Name (Contact)		Customer Rep (Text)
<i>Custom Text Field</i>		Resale Number (Text)
<i>Custom Text Field</i>		Tax ID (Text)
<i>Custom Number Field</i>		Credit Limit (Number)
<i>Custom Text Field</i>		Comments (Text)
<i>Custom Text Field</i>		Default Revenue Account (Text)
<i>Custom Dropdown Field</i>		Delivery Options (Dropdown)
<i>Custom Text Field</i>		Territory ID (Text)
<i>Custom Text Field</i>		Shipping Method (Text)
ID (Contact)		Customer Type ID (Text)
<i>Custom Text Field</i>		GL Group (Text)
<i>Custom Text Field</i>		Default Currency (Text)
Status		Status (Dropdown)
<i>Custom Dropdown Field</i>		One-time Use (Dropdown)
<i>Custom Text Field</i>		Default Customer Message (Text)
<i>Custom Dropdown Field</i>		On Hold (Dropdown)
<i>Custom Text Field</i>		AR Invoice Printing Template (Text)
<i>Custom Text Field</i>		Order Entry – Quote Printing Template (Text)
<i>Custom Text Field</i>		Order Entry – Order Printing Template (Text)

<i>Custom Text Field</i>		Order Entry – List Printing Template (Text)
<i>Custom Text Field</i>		Order Entry – Invoice Printing Template (Text)
<i>Custom Text Field</i>		Order Entry - Adjustment Printing Template (Text)
<i>Custom Text Field</i>		Order Entry – Other Printing Template (Text)
<i>Custom Dropdown Field</i>		Visibility (Dropdown)
<i>Custom Text Field</i>		AR Account (Text)
<i>Custom Number Field</i>		Bill in Advance (Number)
<i>Custom Dropdown Field</i>		Before Contract Start Date (Dropdown)
<i>Custom Text Field</i>		Attachment (Text)
<i>Custom Text Field</i>		Default Retainage Percentage (Text)
<i>Custom Dropdown Field</i>		Accepts Emailed Invoices (Dropdown)

Residential Contact/Customer

Followup CRM Field Name	Maps with	Sage Intacct Field Name
ID		Customer ID (Text)
Name		Customer Name (Text)
Name		Display Contact Customer Name (Text)
<i>Custom Text Field</i>		Display Contact Company Name (Text)
Title		Display Contact Prefix (Text)
Name		Display Contact First Name (Text)
Name		Display Contact Last Name (Text)
Name		Display Contact Middle Name (Text)
Name		Display Contact Print As (Text)
<i>Custom Dropdown Field</i>		Display Contact Taxable (Dropdown)
<i>Custom Text Field</i>		Display Contact Tax Group (Text)
<i>Custom Text Field</i>		Display Contact Tax Solution (Text)
<i>Custom Text Field</i>		Display Contact Default Tax Schedule (Text)
<i>Custom Text Field</i>		Display Contact Tax ID (Text)
<i>Custom Text Field</i>		Display Contact SIRET (Text)
<i>Custom Text Field</i>		Display Contact Legal Category (Text)
<i>Custom Text Field</i>		Display Contact Type of Company (Text)
<i>Custom Text Field</i>		Display Contact Main Activity (Text)
<i>Custom Number Field</i>		Display Contact Registered Capital (Number)

<i>Custom Text Field</i>		Display Contact VAT Regime (Text)
Cell		Display Contact Phone Number (Text)
Cell		Display Contact Phone 2 (Text)
Cell		Display Contact Mobile Phone (Text)
<i>Custom Text Field</i>		Display Contact Pager (Text)
<i>Custom Text Field</i>		Display Contact Fax (Text)
<i>Custom Date Field</i>		Display Contact No Label Specified (Date)
<i>Custom Dropdown Field</i>		Display Contact GST Registered (Dropdown)
<i>Custom Text Field</i>		Display Contact No Label Specified (Text)
<i>Custom Text Field</i>		Display Contact No Label Specified (Text)
Email		Display Contact Email Address (Text)
Email		Display Contact Secondary Email Address (Text)
<i>Custom Text Field</i>		Display Contact URL (text)
<i>Custom Text Field</i>		Display Contact URL 2 (text)
<i>Custom Dropdown Field</i>		Display Contact Visible (Dropdown)
Address		Display Contact Address Line 1 (Text)
Address		Display Contact Address Line 2 (Text)
Address		Display Contact Address Line 3 (Text)
City		Display Contact City (Text)
State		Display Contact State or Territory (Text)

Zip Code		Display Contact Zip or Postal Code (Text)
<i>Custom Text Field</i>		Display Contact Country (Text)
<i>Custom Dropdown Field</i>		Display Contact Country Code (Dropdown)
<i>Custom Number Field</i>		Display Contact Latitude (Number)
<i>Custom Number Field</i>		Display Contact Longitude (Number)
Status		Display Contact Status (Dropdown)
<i>Custom Text Field</i>		Term (Text)
<i>Custom Text Field</i>		Customer Rep (Text)
<i>Custom Text Field</i>		Resale Number (Text)
<i>Custom Text Field</i>		Tax ID (Text)
<i>Custom Number Field</i>		Credit Limit (Number)
<i>Custom Text Field</i>		Comments (Text)
<i>Custom Text Field</i>		Default Revenue Account (Text)
<i>Custom Dropdown Field</i>		Delivery Options (Dropdown)
<i>Custom Text Field</i>		Territory ID (Text)
<i>Custom Text Field</i>		Shipping Method (Text)
<i>Custom Text Field</i>		Customer Type ID (Text)
<i>Custom Text Field</i>		GL Group (Text)
<i>Custom Text Field</i>		Default Currency (Text)
Status		Status (Dropdown)
<i>Custom Dropdown Field</i>		One-time Use (Dropdown)
<i>Custom Text Field</i>		Default Customer Message (Text)
<i>Custom Dropdown Field</i>		On Hold (Dropdown)
<i>Custom Text Field</i>		AR Invoice Printing Template (Text)
<i>Custom Text Field</i>		Order Entry – Quote Printing Template (Text)
<i>Custom Text Field</i>		Order Entry – Order Printing Template (Text)

<i>Custom Text Field</i>		Order Entry – List Printing Template (Text)
<i>Custom Text Field</i>		Order Entry – Invoice Printing Template (Text)
<i>Custom Text Field</i>		Order Entry - Adjustment Printing Template (Text)
<i>Custom Text Field</i>		Order Entry – Other Printing Template (Text)
<i>Custom Dropdown Field</i>		Visibility (Dropdown)
<i>Custom Text Field</i>		AR Account (Text)
<i>Custom Number Field</i>		Bill in Advance (Number)
<i>Custom Dropdown Field</i>		Before Contract Start Date (Dropdown)
<i>Custom Text Field</i>		Attachment (Text)
<i>Custom Text Field</i>		Default Retainage Percentage (Text)
<i>Custom Dropdown Field</i>		Accepts Emailed Invoices (Dropdown)

Project/Budget

Followup CRM	Maps with	Sage Intacct
Field Name		Field Name
Project ID		Budget ID (Text)
Name		Description (Text)
<i>Custom Text Field</i>		Budget Item Account (Text)
<i>Custom Text Field</i>		Budget Item Period Name (Text)
<i>Custom Dropdown Field</i>		Default Budget (Dropdown)
<i>Custom Dropdown Field</i>		Single Currency Budget (Dropdown)
<i>Custom Text Field</i>		Consolidated Currency (Text)
Contract Type		Project Contract (Dropdown)
<i>Custom Text Field</i>		Consolidated Currency (Text)
<i>Custom Number Field</i>		Budget Item Amount (Number)
<i>Custom Text Field</i>		Budget Item Department (Text)
<i>Custom Text Field</i>		Budget Item Location (Text)
<i>Custom Text Field</i>		Budget ID (Text)

Project/Contracts

Followup CRM Field Name	Maps with	Sage Intacct Field Name
Name		Contract Name (Text)
Pass Off To Production		Start Date (Date)
Bid Date		End Date (Date)
<i>Custom Dropdown Field</i>		Term Type (Dropdown)
Contract Type		Contract Tracking (Dropdown)
Project Comment		Description (Text)
Project ID		Contract ID (Text)
State		State (Dropdown)
<i>Custom Text Field</i>		Bill To (Text)
<i>Custom Text Field</i>		Ship To (Text)
<i>Custom Dropdown Field</i>		Billing Frequency (Dropdown)
<i>Custom Dropdown Field</i>		Renew (Dropdown)
<i>Custom Text Field</i>		Renewal Template (Text)
<i>Custom Text Field</i>		Evergreen Template (Text)
<i>Custom Number Field</i>		Renewal Term Length (Number)
<i>Custom Dropdown Field</i>		Renewal Term Period (Dropdown)
<i>Custom Text Field</i>		Billing Price List (Text)
<i>Custom Text Field</i>		Fair Value Price List (Text)
<i>Custom Text Field</i>		Department (Text)
<i>Custom Number Field</i>		Bill In Advance (Number)
<i>Custom Dropdown Field</i>		Bill In Advance Term (Dropdown)
<i>Custom Number Field</i>		Bill In Advance for Renewal (Number)

<i>Custom Dropdown Field</i>		Bill In Advance Term for Renewal (Dropdown)
<i>Custom Text Field</i>		Attachment (Text)
<i>Custom Text Field</i>		Contract Type (Text)
<i>Custom Text Field</i>		Additional Contact (Text)
<i>Custom Text Field</i>		Class (Text)
<i>Custom Text Field</i>		Vendor (Text)
<i>Custom Text Field</i>		Employee (Text)
<i>Custom Text Field</i>		Project (Text)

Project/Cost Codes

Followup CRM	Maps with	Sage Intacct
Field Name		Field Name
Name		Name (Text)
Sales Status		Task Status (Dropdown)
Project ID		Task ID (Text)
Project ID		Item ID (Text)
<i>Custom Date Field</i>		Planned Begin Date (Date)
<i>Custom Date Field</i>		Planned End Date (Date)
Project Comment		Description (Text)
<i>Custom Dropdown Field</i>		Billable (Dropdown)
Project ID		Standard Task ID (Text)