facilisgroup

Fall 2025 Release Webinar Q&A

Decoration Cost Manager:

1. In the grid, do I save the run charge cost or price?
    a. The grid will save the run charge cost and the ability to save a markup percentage.
2. How many decoration grids can I create?
    a. There is no limit to the number of grids you can create.
3. What decorators can I create grids for?
    a. For any supplier or vendor you can create a PO for, you can also create a grid for. It can be for both a group and specific to you. Our recommendation is to create grids for your local decorators, your in-house decoration departments, not for a supplier doing its own decoration.
4. Where can my sales team apply these run charges to?
    a. Sales can apply run charges to the Proposal pricing grid. With our intent to add more features to come for quotes and the sales process.
5. In the decoration cost manager, can we have multiple grids per decorator? If they have different costs for a second location compared to the first?
    a. Yes, absolutely! You can create multiple grids per decorator if needed for any number of locations or different decoration methods.
6. Is there a way to save setup charges for grids?
    a. Setup charges aren't currently supported in this version but it's a great suggestion and something we are reviewing for potential future updates.
7. How would this work with a two-decoration location product?
    a. Create a new grid for two locations and input the cost for two locations based on the quantity break. Your sales team can then apply that cost to the proposal like they would for one location cost. Make sure the grid name and/or description calls out the number of locations.
8. Can we include additional costs, like poly bags, size stickers, and base underlay?
    a. These additional costs can be included in the costs when creating the grid based on the quantity column if applicable. If this doesn't work based on the quantities, then these charges should be added in the proposal's "additional details" field.
9. Can the decoration cost manager be used in quotes or sales orders?
    a. This first phase has the decoration grids in proposals and will continue to add the feature to other sales tools in Syncore.
10. Are we able to create decoration grids today, before live on November 14?
    a. Everything will be available on November 14.
11. For the decoration pricing grids, will preferred vendor decoration information be preloaded or will we need to add these?
    a. We recommend creating decoration grids for your in-house decoration departments or your local decorators. You can create grids for Preferred Suppliers but this is something you will need to keep updated manually. To avoid updating these costs from Preferred Suppliers, use the ASI data to fill in the decoration costs.

Deposits and Credit Card Fees:

1. If I already have convenience fees set up, will I need to do anything else?
    a. No, if you've already set up your convenience fee account with Paya, make sure your key is saved in Syncore settings. Otherwise, there is nothing further to do. Your teams will see the feature once it is released.
2. Can I save which contacts to apply fees to and which ones to be exempted?

    a. That is great feedback that we will review further, but only currently available at the sales order level.
3. If I collect 50% deposit up-front, can I apply the fee at invoicing?
    a. Yes, and the fee is always based on the outstanding balance of the sales order.
4. When will Credit Card Fees be available in Canada?
    a. Paya has credit card fees planned for Q1 2026, and we will have more updates as we approach that date.
5. Is there a setting whereby if a customer pays via the link sent but they paid outside their terms, is there any way to automatically apply 3% fee to that payment?
    a. This specifically isn't an option, but we will review it further and add it to the Ideas Hub.
6. If we are not set up with Paya, will the option be hidden?
    a. Correct; this option will only show when you've set up with Paya.
7. Is there a change coming for the invoices to be clearer to note the amount due versus the amount due by credit card?
    a. Yes, an update is coming soon to the invoice PDF to make the credit card amount clearer.
8. Can we use the CC fee on invoices as well as deposits?
    a. Yes, make sure the deposit and CC fee are enabled and it will work when sending invoices and deposits.
9. Is there an option to use Stripe versus Paya?
    a. Syncore only supports credit card integration with Paya.

Freight Program Decorators:

1. I already have the PSST Decorators saved in Syncore. Do I need to re-add them in the new section in Syncore Settings?
    a. No, all your PSST Decorators and their SanMar-approved addresses will be pre-loaded into the Supplier Freight Program Decorators section in Syncore Settings to start (courtesy of SanMar!). You will just want to review and make sure all the Decorators you need are listed. After the Fall Release, you will need to update the Decorator information if you receive updates from SanMar or as you need to add new Decorators to your list.
2. What happens if PSST is not selected on the PO, but is noted in the Instructions field instead?
    a. If PSST is not selected in the Ship On area on the PO, then there is a good chance freight charges will likely be applied to your order since SanMar looks to that specific field to know the order is PSST.
3. Are there other Supplier Programs that are supported by the Supplier Freight Program feature?
    a. At this time, only SanMar's PSST is supported, but the Supplier Freight Program feature can support other Supplier programs in the future.
4. What if I don't see the Decorator I need in the Purchase Order drop-down menu?
    a. There is an option to select "Other" from the list if you know of and are using a Decorator that hasn't been added in Settings. Once you select other, you can input or select the Ship To address. We do suggest contacting your Admin to ensure the Decorator is added in settings going forward.

ePO (Electronic Purchase Order):

1. How will sales know which vendors take ePOs?
    a. You can always find an up-to-date list of ePO Suppliers in the Syncore Knowledge Base. As of today, suppliers that accept ePOs are Charles River Apparel, Koozie Group, S&S Activewear, SanMar, and as of this week, we can now include Hit Promotional Products on that list. So, you can expect to receive more information on Hit ePOs very soon if you haven't already! Here is a link to the article for your reference. https://syncoresupport.zendesk.com/hc/en-us/articles/39297820628763-ePO-Suppliers
2. Are we able to mark Critical or Rush on the PO when sending an ePO order like we can when sending a PO in an email?

    a. Yes, you are able to mark the PO Priority on the PO Page to either Standard or Rush and the order will be sent accordingly. Currently, all Rush orders are sent via email for special handling.
3. Can you add an attention line to the blank goods ePO so the Decorator knows which order the blanks apply?
    a. Yes, you can certainly add an attention line by using the Contact Name field in the Ship To section on the PO Page.
4. We tend to use our account instead of the vendor's account for shipping, and it usually kicks it back making us email it. Will ePOs be able to be sent with a non-vendor freight account?
    a. Absolutely. Right now, non-vendor shipping accounts are not supported for some ePO suppliers, however, that is an enhancement you can expect to see in an upcoming release.
5. Maybe instead of ATTN it could be labeled PO#?
    a. Great suggestion; we encourage you to add this to the Give Feedback or vote!
6. Does an order qualify as an ePO order if SanMar is used as the supplier, but the decorator is not yet an ePO decorator
    a. Yes, the SanMar Order will qualify for ePO, however, the PO sent to the Decorator will be sent via email.
7. Will there be an update in the future wherein we can pre-select line items before duplicating SOs or POs?
    a. This is a great suggestion, and we encourage you to add it to the Give Feedback or vote!

AR Statements:

1. How are the overdue days calculated for the invoices?
    a. The overdue days are calculated based on the day the SO was invoiced and the terms selected for the invoice.
2. Can I preview the statement before sending it for accuracy?
    a. Yes, you can preview the statement before sending it. At Step-3 of sending the statement email, the “Preview” option at the bottom left of the window allows you to preview the statement before sending.
3. Is the Overdue watermark always applied if selected, even though there are no overdue invoices?
    a. No, when the option to apply Past Due watermark is selected, the watermark is only applied to the statement if it has at least one overdue invoice.
4. Can the invoices from multiple contacts be combined into one statement?
    a. No, the statement shows outstanding invoices for one contact.
5. Is there a way to get the individual invoices sent with the statements?
    a. With this release, there isn’t a way to include invoices, but this is something we are reviewing to add to the feature.
6. Does the client statement include consolidated invoices?
    a. The client statement includes a section for where it lists all the consolidated invoices for the client that have outstanding balance dues.
7. Will we have the ability to send mass statements?
    a. The statements cannot be sent in bulk at once. The statement for each contact/client needs to be sent individually.
8. Can a finance user download the client statement?
    a. Yes, finance teams can download the client statement as a PDF file.
9. Will the overdue day count be based on days past due customer terms?
    a. The overdue days are calculated as the number of days passed after the due date of the invoice. The due date is calculated based on the payment terms of the invoice.

Syncore + Outlook Connector:

1. I thought that sending emails from Outlook to Syncore was going to be ready for this release. When will that be ready?

    a. The Outlook Connector has been released as part of the beta program. As we get more feedback and validation from our partners, we will expand the release until we make it generally available to all partners. We are managing this process outside scheduled seasonal releases, and we will provide new updates directly on the Outlook Connector soon. In the meantime, if you have any specific questions, please reach out to your Success team.

2. Great support for Microsoft Outlook. Any idea if it will support Gmail?
    a. The support of a Gmail connector is in the future. In the meantime, you can add an Outlook account to Gmail to keep these in sync.
3. Will the connector allow you to save prospects and clients?
    a. Yes, both prospects and clients will be shown in the Outlook connector.
4. Did you say there is already a plan to expand this to support Calendar updates?
    a. Yes, we are looking to add the ability to save appointments to Syncore in a future release.
5. Can we save emails to Jobs?
    a. This is something we are looking to do in a future release.
6. Will the Outlook integration features be available for our mobile devices?
    a. Unfortunately, Outlook for mobile devices doesn't support integrations/add-ins. If Microsoft adds support for this, we'll look at making it available.
7. Can you color code the correspondence in Syncore + Outlook connect?
    a. This first pass won't have the ability to set the color for the email note but make sure to add this to the Ideas Hub so others can vote on this too!
8. Do I need to click a button for every email I want to log?
    a. Yes. You need to select the Save Email to Syncore button for each email you want to track. This will ensure only business-relevant updates are saved.
9. Is the Outlook Connector free?
    a. Yes, it’s free.
10. Will email attachments and images be logged?
    a. No. The initial release logs text only, but we will consider this for a future release.
11. When I save emails, do they go to Opportunities?
    a. The emails are saved in the client’s communication log.