

Fall 2025 Release Preview 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. You can create a grid for any of your suppliers or vendors, both group and specific to you. Our recommendation is to create grids for your local decorators and 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 more features to come for quotes, etc.
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.

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 setup 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 exempt?
 - 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 by the link sent, but they paid outside their terms, any way to automatically apply 3% fee to that payment?
 - a. At the moment, this specifically isn't an option, but will review it further and add it to the Ideas Hub.

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 of 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!). After the Fall release, you will be responsible for maintaining the Decorator information as 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?
 - a. If PSST is not selected, then there is a good chance that SanMar's system will apply freight charges to the order.
3. Is PSST the only Program that is supported by the Supplier Freight Program feature?
 - a. At this time, yes, but the Supplier Freight Program feature can support other Supplier programs in the future.

ePO (Electronic Purchase Order):

1. How will sales know which vendors take ePOs?
 - a. We keep a list of ePO Suppliers updated in the Knowledge Base. Here is a link to the article for your reference. <https://syncresupport.zendesk.com/hc/en-us/articles/39297820628763-ePO-Suppliers>
2. Where would we add information to request a preproduction sample?
 - a. You can request preproduction proofs as a nested comment line for the product you need one for, or in the Special Instructions field.
3. Are we going to be given canned message options for nested line items since parent line items will throw these things off, like a previous PO # or in-hand date?
 - a. Great suggestion and it is something we will consider as a future enhancement.
4. With custom products without an id number, it's a given that ePO is not possible, correct?
 - a. Correct, products added from the product search only will work for ePO.
5. What if we are not receiving automatic updates from SanMar with tracking #. Would this be a SanMar issue if not ours
 - a. You should be receiving your updates from SanMar. If you are not, please reach out to Syncore Support Team for us to investigate further.

AR Statements:

1. Can a finance user download the client statement?
 - a. Yes, finance teams can download the client statement as a PDF file.
2. 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.
3. 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.
4. 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.
5. Can the statements be prepared by client group or just each contact? Also, will consolidated invoices show up as consolidations instead of each?
 - a. The statement is generated for each contact/client individually and not for the client group. The consolidated invoices for the respective contact/client appear on the statement under a separate section. Any invoice that is part of the consolidated invoice is not listed separately on the statement.
6. Will we be able to send statements to all clients automatically every month without having to go into each client file?
 - a. Sending statements automatically is something we have on the plans for future development.

Syncore + Outlook Connector:

1. 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.
2. Will the connector allow you to save prospects and clients?
 - a. Yes, both prospects and clients will be shown in the Outlook connector.
3. 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.
4. Can we save emails to Jobs?
 - a. This is something we are looking to do in the future.
5. 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.
6. Can you color code the correspondence in the Syncore + Outlook connect?



- a. Thank you for your question! 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!
- 7. When will the Syncore + Outlook connector be live?
 - a. More information will be shared when we complete the early access testing.

