facilisgroup

Spring 2026 New Release Webinar Q&A

Customized Proposals:

1. **Who has access to design proposals?**
   a. This will be Admins only through Syncore Settings.
2. **How many designs can I create?**
   a. It is one proposal design per distributor that will be automatically applied to all proposals.
3. **Are the proposal design features set company-wide, or are they adjustable on each proposal?**
   a. Proposal design in one sets the design for the entire company.

Online Approvals:

1. **Who gets notified of the customer's response?**
   a. Both the user who sent the original email and the primary rep will be notified when the customer approves or requests changes.
2. **Can order approval verification codes be disabled?**
   a. Yes, admins will be able to turn off the code when this is released from Syncore Settings.
3. **What is the "from address" in the email verification code? Is the email sent to the customer?**
   a. The verification code is sent from the user who originally sent the online approval link to the customer.
4. **Will the Job number go back to the subject line when sending proof emails?**
   a. The job number can be added by editing the email default *in Syncore Settings > Emails > Sales Order.*
5. **Will the link show "approved" after the fact once they click it?**
   a. The online approval page shows the response of the customer always after the link has been clicked.
6. **For the verification code, will that be sent with every online approval email?**
   a. Only if the option is enabled, then yes, each approval will need a verification code, however if the verification code is disabled it will not be required.
7. **For approvals, have you made it so we can change the wording on the email going out with the request?**
   a. You can adjust the email default to include wording for the approval in the *Syncore Settings > Emails.*
8. **What if the proof needs to be forwarded to a second person after the original was sent? Will the new person also receive a code? Or if multiple people are cc'd, will they all get it?**
   a. When multiple people are included in the original email, they will all get the verification code.
9. **If the verification code approval is active, will this be an automatic flow when sending the sales order and art or will you be able to select if you would like the verification code approval?**
   a. This will be an automatic flow for all online approval links if the feature is enabled in your company settings.
10. **Does the client then get a new email stating they have approved their proof/artwork?**
    a. This currently isn't part of the workflow, however, it is something we are reviewing.
11. **Is there any possibility to make the approval/changes notes in the system appear in a color to stand out a little more?**
    a. Thank you for your feedback! We are reviewing this further to make this better.
12. **With these changes, will sending the proof to the client via the acknowledgement for online approval be the only option for sending the proof or will sending it through the previous Sales Order option still be available?**

   a. With the Spring release, the sending of a Sales Order with or without proofs does not change and is still available. This release now allows Acknowledgements to be sent with the same online approval link for proofs.

13. **Can we add more email addresses for proof approvals?**
    a. Currently, the recipients of the notification email cannot be changed but would recommend adding your feedback to the Ideas Hub.

Sales Improvements:

1. **When I turn the TSC shopping cart off, does this change the wish list or presentations?**
   a. Hiding the shopping cart does not change the wish list or presentation features.

Automated AP Status:

1. **Do the purchase orders for suppliers with a different currency also change to Posted AP automatically?**
   a. No, the purchase orders for suppliers with a different currency do not change to Posted AP automatically; they will change to Posted Manually status as they already do.
2. **When Batch Posting supplier invoices I, as an owner, scan them all to ensure that are all accurate. How can I ensure that all posted supplier invoices for the day are indeed accurate?**
   a. Enabling automatic posting is an optional setting in Syncore. If manually reviewing the supplier's invoice details before posting a purchase order is part of your process, then you can keep this feature turned off and continue to process purchase orders as you currently do.
3. **With automatic posting, when I turn on this setting, will it also move the POs already in Approved status to Posted status?**
   a. When enabling the automatic posting setting, it will not move the POs that are already in Approved status. This applies to status changes made after **enabling this setting.**
4. **Is there a way to batch post these into "Posted Manually"?**
   a. Purchase Orders can be posted to Manually or AP in Syncore V1, under *Finance > Batch Posting.* Here is a link to the resources in Syncore Knowledge Base: https://syncoresupport.zendesk.com/hc/en-us/articles/18001256174107-Batch-Posting
5. **With Batch Posting, currently I had the advantage of scanning all approved POs before changing them to Invoices and adding them to AP. With Automatic Posting, what is the recommended method to catch a mistake, will the date of PO approval be kept the same?**
   a. If you review the approved purchase orders before posting them, you could continue doing so as the automatic posting is an optional setting. However, when using the automatic posting feature, we would recommend reviewing the purchase orders when setting them to Approved status.

      With automatic posting enabled, if you want to change the status of a purchase order back to Approved from Posted, you will need to turn off the automatic posting, then change the purchase order status back to Approved. However, this would change the approval date. Our Support and Success teams can help you in the process, if you have additional questions.

Email Multiple Invoices:

1. **Can we only select overdue invoices or any invoice?**
   a. All invoices that currently have an outstanding balance due are displayed to be selected, irrespective of whether they are overdue or not.
2. **When sending multiple invoices, will invoices include any CC fee or payment link?**
   a. There is no payment link in the email to pay the invoices. However, the credit card fee (if applied to the invoice) would be shown on the invoice PDF.

3. **When sending multiple invoice emails, if there is an additional finance email added for the contact, is it automatically populated as a recipient?**
    a. Yes, the billing email and any additional finance email added for the contact is populated in the recipients' field when sending the email.
4. **When sending multiple invoices, is an entry added to the A/R Follow Up notes?**
    a. Yes, an entry is added to the A/R Follow Up notes along with an archived copy of the email.
5. **Is the past due watermark added to all invoices or only to the overdue invoices?**
    a. When the option to add a past due watermark is selected, the past due watermark will only be added to the invoices that are past their due dates.
6. **When you send multiple invoices at the same time - will it show in each job log that the invoice specific to the job was already sent?**
   (and) Does the sending of multiple invoices log those invoices as sent in each individual job? Can we use this process to send the first "original" invoice for each of those jobs?
    a. When multiple invoices are sent in an email, an entry is added to the Accounts Receivable Log for the respective client, keeping everything tracked in one place. No entry is added to the job log. You could use this to send the invoice for the first time, but it won't be logged into the job log.
7. **Is there a payment link available with the multiple invoices sent?**
    a. Currently, there is no payment link in the email to pay the invoices.
8. **Will it mark the Sales Order as invoiced in each job?**
    a. The sales order needs to be in "Invoiced" status already, to appear in the list of invoices to select when sending multiple invoices in an email.

Statements:

1. **When sending statements/AR follow up emails to clients, can the outgoing email be changed?**
    a. Yes, the outgoing emails can be customized in two ways:
       Set email defaults: Go to *Syncore Settings* > *Emails* > *Statements (or Invoices)* to set your default Subject, Salutation, Message, and Sign Off. These will pre-populate every time you send the email.

       Edit before sending: When sending an email, there is an "Email" step in the sending process where you can make one-off changes to any of those same fields before the email goes out.

EPO Report:

1. **Does the new ePO report replace the current ePO Status report, or is this in addition to?**
    a. The new ePO Activity & Outcomes report will fully replace the existing ePO Status Report. You'll still get all the same visibility you have today, but now with even more insights. So, it's really an upgrade as opposed to a new report to manage separately.
2. **Does this report actually tell us why the PO couldn't be sent via ePO?**
    a. Yes—and that's really the added value that this report brings. You can now see the orders that were enabled for ePO but weren't sent via ePO and why. That gives your team the ability to take action and improve orders going forward and reduce the amount of errors you run into.

EPO Workflows:

1. **How would you know that the Order Type is needed? Is it on every ePO?**
    a. The system will prompt you in the ePO send flow if the Order Type confirmation is needed, so nothing you need to remember to do. To start, the confirmation will only be

needed once ePOs are enabled for Gemline shortly after the release. Then you may start to see other ePO suppliers follow suit in the future.

2. **Is there a way to email a PO without using ePOs? E.g. a vendor rep wants to receive a copy of the PO as they are imitating a special program price or special delivery?**
    a. Currently when ePOs are turned on, there is no way to bypass the ePO to send via email instead. If you'd like to have the option to notify supplier rep, please add this to the feedback board.

Job Alerts:

1. **Can sales reps set job alerts for orders in pending status?**
    a. Sales reps can create job alerts for their jobs in pending status.
2. **What is a job alert and where do we create it?**
    a. A job alert is a reminder that can be added to the job from the job page. At the bottom of the job page is a tab for "Alerts". You can find out more in the Syncore Knowledge base.

Syncore Connect (Outlook):

1. **Can you provide information on how we turn on the Outlook Connector?**
    a. Go to the Microsoft Store, and find the Outlook add-ins. From there, you can easily find the Outlook email Connector for Syncore add-in and install it. Also, your IT team can still do the group install if preferred.
2. **Does the Outlook integration sync calendars as well email?**
    a. That will be available in a future release.
3. **Will Syncore make more automation from the emails like making tasks and auto filling the prospect info from their email?**
    a. Thanks for the feedback. We will evaluate options for that as we build more functions into the connector.
4. **Does the Outlook connector add every email in the thread automatically or does the user trigger it?**
    a. The user specifically adds emails to the thread, allowing them to keep the logs focused and not a clutter of all back-and-forth communications that may not be needed.
5. **When is the Syncore/Outlook Connector going live?**
    a. The Outlook Connector is already live and available to you in the Microsoft store.
6. **Where can I find instructions there to set it up?**
    a. In the Syncore Knowledge Base there is an article on how to setup and any FAQs for your reference.
7. **For the Outlook connector, can the system not post the entire email chain each time but only the most recent email, or allow us to edit what is being posted?**
    a. The Outlook Connector will only post the most recent email and not the entire thread, if this is happening, this is a system issue and should be reported to Support.

Other Questions:

1. **When adding or updating client, do we need to update client information and emails in V1 and V2?**
    a. All of the contact emails can be updated in V2 only. A contact should only have one email address per field. On the contact in V2, there is the Additional emails area to add other emails for the contact. You also have the billing email and the AP email available in V2.
2. **Will we ever be able to duplicate a contact?**
    a. This is something we will continue to review as a future enhancement.
3. **Can you revise proposals so clients can scroll through the products from the product itself, so they don't have to return back to the main page each time?**
    a. Thank you for your feedback! Please make sure to add your feedback to the ideas board.

4. **Is there an easy way to transfer contacts from 1 rep to another rep that can be done in a "mass" transfer?**
    a. Yes, you can use the Contact List Builder feature to reassign contacts from one sales rep to another.
5. **Are there plans to bring quotes into the online approval process? Along the same vein, are graphics services going to be made available at the quote stage at some point?**
    a. Yes. This is something we will continue to review but don't have a timeline to share.