facilisgroup

Spring 2026 Release Preview 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. **What is the from address in the email verification code email sent to the customer?**
   a. The verification code is sent from the user who originally sent the online approval link to the customer.
3. **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.
4. **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.
5. **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.
6. **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.
7. **For the order approval verification codes, can this be disabled?**
   a. The verification code cannot be turned off as it is to ensure the correct customer is approving the order. This is both an accuracy and a security validation.
8. **For the verification code, will that send with every online approval email?**
   a. Each response for an online approval requires the verification code if the customer is approving or requesting changes.

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 all are 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.

Email Multiple Invoices:
1. **Can we select invoices across contacts?**
    a. Currently, invoices can only be selected and emailed for one contact at a time. It does not support selecting invoices across multiple contacts and sending them in a single email batch.
2. **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 if they are overdue or not.
3. **Can we add past due watermark on the invoices?**
    a. Yes, you can opt to add a past due watermark so the system will add it only to the invoices that are past their due date.
4. **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.

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 on 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. Then you may start to see other ePO suppliers follow suit in the future.

Job Alerts:

1. **Can sales reps set up 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:

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. **Are there versions of Outlook that don't accommodate this feature of linking up with Syncore? I do not see that option to add in.**
    a. Mobile versions of Outlook are not supported.

General Questions:

1. **Is there a way to put birthdays for other people besides the main contact on the account?**

Syncore currently supports one birthday per contact. This is great feedback. Please make sure to add to the Idea