facilisgroup

Summer 2026 Release Preview Webinar Q&A

Product Wizard:

1. **Will this add complexity or time to adding products?**
    a. No. Even though more options are available, if you're adding a straightforward product with a single color and decoration, the workflow is just as quick as before. The redesign adds flexibility for more complex products without getting in the way of your simpler orders.

2. **Will this change how my orders look or affect supplier processing?**
    a. No, the overall line-item structure on your Quote and Sales Order will remain the same as is today and follows our Core 360 Best Practices. The Product Wizard captures more product details upfront and organizes them automatically in a clear, consistent format, making it easy for your team, clients, and suppliers to review and process.

3. **Does this mean I won't have to manually add additional decoration details or run the wizard for every color I need?**
    a. That's exactly the goal. These updates let you capture more product details upfront while adding the product, reducing the need to manually update line items with key details afterward.

4. **Does this update apply to the Proposal to Quote process as well?**
    a. Not yet. These enhancements are currently available only when adding products to Quotes and Sales Orders through the Product Wizard. Bringing similar capabilities to the Proposal-to-Quote conversion process is on our roadmap for a future release.

5. **What if I don't have all of the information yet?**
    a. Not to worry. You can still use the **Skip Configuration** feature to add the product now, then come back later to fill in the details via the Product Wizard.

6. **Are the products added to the quote separately or will they be combined? Example, a t-shirt with 3 different colors is listed as 1 item with 3 colors and their sizes, or will the quote show 3 different shirts each with its own color?**
    a. From the Product Wizard, you'll configure the product once for all the colors you need. Once you complete the Wizard, the system will automatically create 3 shirts, each with its own color, for better order processing.

ePO Workflow:

1. **For Split Shipments, does this mean ePO will be supported for more suppliers?**
    a. Yes. That's actually one of the primary drivers behind this enhancement. Having a consistent way to identify Split Shipment orders means we'll be able to begin PCNA's ePO integration shortly after release, with Cutter & Buck to follow.

2. **Where can we enter the Split Shipment address(es)?**
    a. Split Shipment addresses are still added to the Sales Order. That process hasn't changed. When creating a Purchase Order that has multiple addresses, you can still provide the Split Shipment addresses as you do today, either as an attachment or as an order note. This enhancement simply indicates whether or not the order has a Split Shipment.

Organizations:

1. **Can I bulk add Contacts to an Organization?**
    a. Yes, you can search for and add multiple Contacts to an Organization from the Organization's profile.

2. **Can Sales Reps associate Contact with an Organization?**
    a. Yes, when a Sales Rep is creating a Contact, they can select and associate an organization with the Contact.

3. **When a Contact is inheriting the Organization's details, will the Contact data update automatically when the Organization is updated?**
    a. Correct. When a Contact is inheriting details from the Organization, any updates made to that data at the Organization level will automatically apply to the Contact as well.

4. **Can a Contact be associated with multiple Organizations?**
    a. No, a Contact can only be associated with one Organization.

5. **Will there be a way to create new Organizations based on existing Client Groups?**
    a. Yes. When you create an Organization, you'll be able to quickly find and assign Contacts based on existing Client Groups.

6. **For Organizations, will it be possible to have nested Organizations? For example, if a parent company owns 3 different companies?**
    a. This isn’t available in the first release of Organizations, but we will make sure to review this feedback further.

7. **On the Organizations, is this essentially a merge of accounts? Does it allow you to search for Jobs over multiple Contacts?**
    a. The first release of Organizations allows for grouping and reporting of Contacts. Being able to search for Jobs for a specific Organization is something we are continuing to look into.

8. **For Organizations, will you have to load all billing and shipping info when loading a new Contact?**
    a. When creating a Contact, you'll have the option to use the Organization's information, saving you time. When creating the Organization itself, you'll need to add the billing and main address information.

9. **Will Organizations allow for different shipping and billing info?**
    a. An Organization will have one main address and one billing address. Each Contact within the Organization can have the same or different addresses as needed. Adding additional addresses to the Organization is something we are reviewing further.

10. **Can you add prospects to Organizations?**
    a. Yes, in fact all Prospects, Suspects and Clients can be added to an Organization if needed.

11. **Under Organizations, will we be able to create the Organization and add existing Contacts to that Organization, or will we have to create new Contacts for a new Organization?**
    a. You will be able to create an Organization and assign any existing Contacts to the Organization.

12. **Will Sales Reps continue to be assigned to the Contact vs the Organization?**
    a. Sales Reps will continue to be assigned to the Contact.

13. **If an Organization can have multiple Contacts, what are now the Client Groups for? What is the difference between a Client Group and an Organization?**
    a. Client Groups let you group Contacts together so you can see if they're related. Organizations do that too, but they also hold the company's own information: addresses, account alerts, credit limits, and payment terms are maintained once at the organization level and applied automatically to the associated Contacts.

       That's the shift: from simply grouping Contacts to centralized Contact management, or a single source of truth, for the company. Put simply, a Client Group organizes Contacts, while an Organization manages them.

       Organizations are the recommended way to model a company relationship going forward. Existing Client Groups keep working as they do today, and we'll share more on their longer-term path in the future.

Syncore Connect:

1. **What information syncs for the HubSpot integration?**
    a. The HubSpot integration syncs Contact information between the two systems. Contacts in HubSpot can be synced to create/update Prospects or Clients in Syncore. Clients in Syncore will create/update Contacts in HubSpot. When a Job in Syncore is created under a Client, a deal will be created on the customer record in HubSpot.

Product Search:
1. **Do I have to use the new Product Search?**
    a. No. You can continue using the original Product Search for now. In the future, the original Product Search will be removed, and the new Product Search will become the default, so we recommend setting aside some time to try it out.

2. **How do I see a product's inventory?**
    a. You can view inventory in a few ways:
        - Hover over the product and select the box icon.
        - Select the product, then select **View Details** and choose the **Inventory** tab, located last at the top.
3. **How do I get to a product's page on the Supplier's website?**
    a. You can reach the Supplier's website in two ways:
        - Hover over the product and select the box arrow icon to open the website in a new tab.
    - Select the product, then select **View Details**, and select **View on Supplier Site** on the right side of the product pop-up.

4. **How do I quickly find a Supplier in the filters list?**
    a. We moved the Supplier filter to the first filter spot. From there, select Show More in the filters list, then type the Supplier's name at the top of the filters box.

5. **If I need a product in a specific color, will advance filters allow me to search by a specific color?**
    a. Yes. If you know you need an orange mug, you can use the color search dropdown. You will also have decoration methods, quantities and categories. And if you know you don't

want a certain product type, you can use the new exclude keywords field.

6. **Do I have to select "Try it out!" each time?**
    a. Yes, this is currently an optional feature. You'll need to select **Try it out!** each time, until it becomes the default, or your search preference is saved to your profile. We'll share updates as they become available.

7. **When will the new Product Search become the default?**
    a. There isn't a timeline to share at this time. Facilisgroup will communicate any updates.

8. **How do I change the vendor class to All?**
    a. Select the **Advanced** button, then go to the **Supplier** > **Supplier Group** dropdown and change it from **Preferred** to **All**. Select **Search** to apply the change.

9. **What pricing grid appears in the quick glimpse?**
    a. When you select a product to see a quick glimpse or high-level information, the first pricing grid from ASI is displayed. This isn't necessarily a "standard" or "default" grid. It may be decorated or blank. Select **View Details** to see all available pricing grids.

10. **Why does the color swatch looks slightly different from what I expected?**
    a. Swatches are indicative and give a general sense of the color rather than an exact match. Confirm the precise shade and colors with the Supplier before ordering.

11. **Why can't I check live inventory on some products?**
    a. Live inventory is only available for products whose Suppliers provide it. When it is not available, the **Check Inventory** option does not appear.

12. **Will all pricing be updated from each Supplier?**
    a. Pricing is still provided by ASI. Suppliers use a few different methods to send pricing updates to ASI, and we display the latest pricing from ASI in the product search.

13. **In the Product Search, can you enter the quantity you need and find items only in stock?**
    a. The new Product Search allows you to search by quantity and by products that offer live inventory, but it doesn't currently support quantity searching within those stock numbers.

General Questions

1. **Will an invite be sent out for the training later this month?**
    a. Yes. An invite is sent out closer to the training date. Reminders are also included in the 411 weekly email, along with updates on the Syncore Home Dashboard.

2. **Are all these new options available for Canadian partners as well?**
    a. Yes, the Product Wizard, Organizations and Product Search are all available to both Canadian and American partners.

3. **What else can we expect from the API updates?**
    a. Make sure to reach out to your OKM or your Facilis account manager to sign up for the API updates directly. New and updated endpoints will be made available for Syncore.