facilisgroup

Summer 2026 Release 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 to 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. 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. When the product is added to the order, all the details you entered in the wizard will be automatically organized in a clear, consistent format, making it easy for your team, clients, and Suppliers to review and process.
3. **Are the product colors added to the Order separately or will they be combined? Example, would a t-shirt with 3 different colors be listed as 1 item with 3 colors and their sizes, or 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.
4. **With the new Wizard, can we save a 3rd party decorators pricing in Syncore so when we select them as a vendor in the new Wizard their pricing automatically pulls the vendors price?**
   a. Great question! Currently the new Wizard does not connect to 3rd party decorators. However, we will review this further and connect this to the existing feature for Decoration Cost Manager.
5. **Product search demo showed items added to Sales Order. Can you build a quote from here?**
   a. Yes! The new Product Search and Wizard experiences are available when adding products to Quotes and Sales Orders

ePO Workflow:

1. **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.
2. **Will PCNA Leeds/Trimark & Bullet profiles need to be "merged" or separated for ePO launch? They are currently two separate profiles in Syncore.**
   a. Great question! We are currently investigating this with PCNA to determine best course of action. Until then, ePO will first apply to Leeds/Trimark, with Bullet to follow as separate vendor profiles.
3. **Are there any ePO Vendors for Canada?**
   a. Yes, Koozie and S&S are available, and you can see the Knowledge Base if you ever need to check. https://syncoresupport.zendesk.com/hc/en-us/articles/39297820628763-ePO-Suppliers

Organizations:

1. **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 they're related to. 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.

2. **Can Sales Reps associate a 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. **Will Sales Reps continue to be assigned to the Contact vs the Organization?**
    a. Sales Reps will continue to be assigned to the Contact.
5. **Can organization alerts be edited or deleted after they are created?**
    a. Organizations allow for 1 alert at a time, and you can edit the alert or remove it whenever you need.
6. **Can we see all jobs under the organization page for that organization?**
    a. The jobs would still remain under the particular contact.
7. **How would we manage an organization that has 20+ buyers with different A/R statuses (past due, delinquencies) and different billing addresses?**
    a. If they are contacts under an organization that need to have different finance details and billing address, you can opt to not inherit the organization data for those contacts but still add them to the organization.
8. **Is there an opportunity for support with bulk organization creation?**
    a. Currently, the organizations can only be created manually in Syncore. We will take this as feedback.
9. **Who do you suggest owning adding organizations for current companies in Syncore? Should this be a sales activity?**
    a. Currently in Organizations, they can be created by any Sales, CSR, Management, Finance, or Admin user role. We are reviewing allowing specific permissions around this, but that isn't available just yet with this release but will follow in an upcoming release.
10. **If a Contact is added to an Organization after the initial setup, can it inherit the data? Specifically tax-exempt numbers.**
    a. Yes, you can choose which specific data or field is inherited from the Organization to each Contact. You can find out what those specific fields are here in the Knowledge Base, Tax Exempt being one of those fields. https://syncoresupport.zendesk.com/hc/en-us/articles/52389215378075-Associating-Contacts-with-an-Organization
11. **Does a Contact have to be associated to an Organization upon creation?**
    a. When creating a contact, assigning an organization is optional.

Syncore Connect:

1. **Can updates made in HubSpot automatically appear in Syncore?**
    a. Yes. Changes made to synced Contacts in HubSpot can automatically update the corresponding contact in Syncore, helping keep customer information consistent across both platforms.
2. **How quickly will the sync work between HubSpot and Syncore?**

    a. The standard sync takes place overnight; however, this is configurable.

3. **Is the QuickBooks integration available to Canadian distributors?**
    a. The QBO integration can be used for Canadian distributors. However, the integration does not differentiate the Canadian taxes as GST, HST, PST or QST. It considers the total of the tax as one tax amount.

Product Search:

1. **How do I see a product's inventory?**
    a. You can view inventory in a few ways:
        i. Hover over the product and select the box icon.
        ii. Select the product, then select **View Details** and choose the **Inventory** tab, located last at the top.
2. **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:
        i. Hover over the product and select the box arrow icon to open the website in a new tab.
        ii. Select the product, then select **View Details**, and select **View on Supplier Site** on the right side of the product pop-up.
3. **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.
4. **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.
5. **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.
6. **Will there be a Made in Canada attribute available? Are general customizations to attributes available?**
    a. That's a good question. We will look into future options, based on what the suppliers provide ASI for our search criteria.
7. **Any initiative to encourage suppliers to update pricing frequently?**
    a. We will pass this along to the Supplier Relations team for additional feedback.

General Questions:

1. **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.
2. **What else can we expect from the API updates?**
    a. Make sure to reach out to your OKM or your Facilisgroup account manager to sign up for the API updates directly. New and updated endpoints will be made available for Syncore.
3. **Will we have the ability to create custom supplier groups, aside from preferred, ASI, etc.?**
    a. That is something in feedback to review, but no updates to share.