facilisgroup

# Winter 2026 Release Preview Webinar Q&A

**Online Approvals**:

1. **What email types will have the Online Approval option?**
   a. Both sending the sales order and sending an acknowledgement email will have the option for customers to approve online.
2. **What does the customer approve?  Sales orders only?**
   a. You will be able to send the SO only, or just Artwork Attachments, or both to the customer for approval.
3. **Will the option for Online Approvals be on or off by default?**
   a. By default, in this first release, the option will be off by default when emailing the sales order or acknowledgment. In a follow up release, this option default will be configurable.
4. **Is the ability to turn on and off able to be done by client or is it system wide?**
   a. With this release, the option for online approval will be turned on for each order, and we are planning that, in the future, configurations can be saved.
5. **When clients sign off/approve, will we still get a notification email, so we know the project is approved and ready to submit, or does it automatically go to submitted status? VERY Excited about this!**
   a. An email will always be sent to notify you of the customer's response when they approve or request changes. At the same time, an entry will be added to the Job Log of the response.
6. **When a customer approves the artwork/sales order, does it automatically alert the sales rep and the CSR? Can it also be sent to the secondary rep?**
   a. The primary rep, secondary rep, sales assistants, and the CSR will all receive a copy of the customer's response.
7. **Can you re-send the online approval if the customer has changes?**
   a. Yes, you can re-send the sales order or attachment for approval.
8. **Does the online artwork approval show a client portal that we can all see or share to keep updates consolidated?**
   a. This version supports online approvals for the single order. A client portal is something we are investigating for 2026 but no timeline to share just yet.
9. **Is there an ability to maintain one email chain, or are new emails started for each stage?**
   a. Syncore doesn't currently support maintaining one email chain, and a new email is sent each time from Syncore.
10. **Is it one approval or does the customer need to click or sign off on multiple things. For example, if they approve a section for ship to address, a section for pricing etc.**
    a. The customer will be approving all items shown on the page. If the SO is shared, then shipping details and line items are approved. When any attachments are shared, they are approving those as well. It will be one approval for all items on the page.
11. **Will there be an online approval available for quotes?**

    a. This release is for sales orders and acknowledgements only. Online approvals for quotes are something we will review in the future.

**Automatic Statements**:

1. **To which email address of the contact is the automatic statement sent?**
    a. The statement email is sent to the following email addresses for the client:
       - Billing email address of the client
       - Any additional finance email addresses for the client
       - A/P contact email address of the client
2. **Is there a log where I can see if the automatic statement was sent to the client?**
    a. When the automatic statement is sent, an entry gets added to the Accounts Receivable Log of every contact to whom the automatic statement is sent.
3. **Can I exclude any contacts from automatic statements?**
    a. Yes, if the "Send Statements" option is disabled for a contact, the automatic statement will not be sent to that contact.
4. **Do the Auto AR statements work with clients that run through V1?**
    a. The program's clients are excluded from automatic statements. However, dropship clients will get automatic statements irrespective of if they are created/managed in @ease (V1) or Syncore (V2).
5. **Can you unselect an invoice with a credit balance only?**
    a. The automatic statement will include all the invoices (including the ones with credit balance) for the respective month. If you would want to exclude invoices with credit balance, this would be a future enhancement. Please add this to our Ideas Hub as feedback.
6. **Will we be able to set up an auto AR statement based on Client Group?**
    a. The automatic statements will be sent to all dropship clients irrespective of the client groups.
7. **Can AR statements only be sent to certain accounts? For example, we have 8-10 accounts we don't want to send monthly statements to.**
    a. If the “Send Statements” option is disabled for a contact, the automatic statements will not be sent to the contact.

**Receive Payments Revamp:**

1. **Is there a change in the way payments are applied to invoices using receive payments?**
    a. No, the functionality remains the same. The only difference is that instead of the 2-steps, you can now search for invoices and apply payment amounts on a single step.

**Supplier Matching for My Saved Shipping Accounts (ePO enhancement):**

1. **How often will I need to go into settings to match my accounts?**
    a. Setup is a one-time step handled by Admin or Management users, unless you need to make changes to the saved account. In either scenario, Syncore will leverage the account information you’ve already entered to find a match, and if there are multiple matches, suggest the best options to make the process more of a quick review than a complete manual setup.
2. **Will this change how CSRs place orders today?**

    a. No. CSRs will continue selecting the appropriate saved shipping account in the Ship On section of the PO page, just as they do today. Once an account has been matched, orders that use it are more likely to qualify for ePO with supported suppliers.

3. **How can I send the ePO# for Hit and be able to attach the art, when I try that it does not give me the option?**
    a. All PO attachments should be added to Decoration Location lines on the PO Page. You can find more detailed instructions in the Assign, Edit and Delete Line Item Attachments article in the Knowledge Base.
4. **EPOs with PSST allow us to select a Decorator but not edit attention line to include our PO info. What's the best way to communicate that this order is from our company without that attention line?**
    a. The Contact Name / Attention To can now be added to the Ship To area on the PO Page for a PSST Decorator. Once added, the PSST Decorator in the Ship On area will be "Other" but you can still send the order via ePO and receive free freight on the order. If you still experience trouble adding the details you need, please contact the support team for assistance.

**Syncore + Outlook Connect**:

1. **What is the main benefit of the latest Syncore Outlook integration update?**
    a. The update will allow users to save Outlook emails directly to **Opportunities** instead of only the Contact Communication Log, keeping communications organized by project and eliminating the need to switch screens or copy and paste emails.
2. **How will saving an email to an Opportunity work in Syncore?**
    a. Users can link an email to an existing Opportunity. If no Opportunity exists, there will be nothing to link it to. Once an email is saved to an Opportunity, it is **automatically saved to the associated contact**, so it only needs to be saved once.
3. **What features are included in the Syncore Outlook integration when it's fully available?**
    a. Users will see contact details and a link to the contact at the top, be able to save emails to Syncore (to contacts and/or opportunities), view follow-ups, and see recent communication log entries. Future phases will also include calendar event integration.
4. **For the emails on opportunities, can you select what emails get added, or will it be automatic?**
    a. Yes. You need to select the Opportunity and select the Save Email to Syncore for each email you want to track. This allows flexibility, as not every email moves the business forward. You can use your judgement. It's one extra click, but much faster than copying and pasting into Syncore manually.
5. **Will there be Gmail integration in the future?**
    a. The current release is only for Outlook. We are planning for other features like Gmail in future releases.
6. **Can you provide information on how we turn on the Outlook Connector?**
    **a.** Right now, we keep expanding this functionality with select partners to implement the Outlook Integration as part of our early access program. It will be generally available in the near future and will be communicated to all partners to help get everyone connected.

**Email Storage Policy Changes:**

1. **What is changing in Syncore's archived email storage policy?**

   a. Previously, emails and attachments sent from Syncore were stored indefinitely. With the new policy, these emails and attachments will only be stored in Syncore for **13 months**. After that, the email copy will no longer be accessible.
2. **Will the job log entries or records of sent emails be deleted after 13 months?**
   a. No, job log entries will remain. The log will still show that an email was sent, along with the date, time, and type of email. However, the button to view the actual email copy and its details will become unavailable after 13 months.
3. **Does this change affect the ability to access old jobs or contacts in Syncore?**
   a. No, users will still be able to access jobs and contacts from any time period, even from years ago. The only change is that the archived email copy will not be viewable after 13 months, although the record of the email remains in the log.
4. **After 13 months, emails will be archived. Will anything be accessible in the archive?**
   a. After 13 months, the archived email copy will no longer be accessible.