facilisgroup

Winter 2026 Release Webinar Q&A

Winter Release:

1. **When will these new features be updated in Syncore?**
    a. Winter 2026 features will be available on Friday, February 13, 2026.

Online Approvals:

1. **What email types will have the Online Approval option?**
    a. Sending the Sales Order email will support the online approval option.
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. It is possible, in a follow up release, this default option 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. 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? VERY Excited about this!**
    a. An email will always be sent to notify you of the customers' 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 CSR will all receive a copy of the customer's response.
7. **Can I send an Online Approval with a Deposit to pay?**
    a. In this version you can choose either online approval or deposit request. We are reviewing support of both so the customer can review and then pay a deposit.
8. **What attachments can be sent for approval to the customer?**
    a. Client attachments and Job attachments can be sent.
    FGS attachments are targeted for a future enhancement.
9. **Can you resend the online approval if the customer makes changes?**
    a. Yes, you can resend the sales order or attachment for approval.
10. **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 there is no timeline to share just yet.
11. **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.
12. **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.

13. **Will there be an online approval available for quotes?**
    a. This release is for sales orders. Online approvals for quotes are something we will include in the future.
14. **Will the artwork that is uploaded in graphic services be available in the attachments when sending approval email?**
    a. In this first version, only Job and Contact attachments will be supported. We are working on Graphic attachments now and will be released as a follow up.
15. **Will this be added to the Graphics tracker?**
    a. Approving or requesting changes is logged in the Job Log only.
16. **Can the customer bypass adding their name when requesting revisions?**
    a. The name is required to be filled out by the customer and cannot be bypassed.
17. **This is for sales orders; sales rep must get the art approval before giving to the CSR doing the proof?**
    a. As part of our Core 360 best practices, we recommend sending the sales order with proofs at the same time, however this doesn't always work for everyone, and partners should do what works best for their business.
18. **Is there any way to have the subject line indicate Proof Approval Required, if we send the proof with the Artwork? That way there is a call to action, especially for urgency.**
    a. You can customize the email subject lines as you need, but there currently isn't a way to set this based on online approval being set.
19. **Can we determine who gets the approvals? And not have the CSR always included.**
    a. In this version, the Primary, Secondary and CSR will get notified. We will review this feedback further for future enhancements.

Email Defaults:

1. **Are the customizations for emails per company or per sales rep?**
    a. The email defaults apply for your entire company.

Assigning AR Follow-up User on Contact page:

1. **Can I bulk assign an AR follow-up user to multiple contacts at once?**
    a. No, currently, the AR follow-up user cannot be assigned in bulk. It has to be done per contact.

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. **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.
3. **How do I identify in the AR log whether the statement was sent automatically to the contact?**
    a. The AR log mentions that the statement was sent by "System" if it is an automatically sent statement.
4. **Will the automatic statement be sent to a client if the client has no balance due?**

    a. No, if there are no balance due or outstanding invoices for a client, then an automatic statement is not sent to such clients.

5. **Can we select what invoices appear on the automatic statement?**
    a. Yes, you can choose to show all outstanding invoices or just overdue invoices on the automatic statement.
6. **Will the auto statements apply to V1 Program clients? Really wish we could set a date verses just the first day of month.**
    a. The automatic statements are dropship clients only. We will expand this to Programs as we build out the new Programs for Syncore (V2) feature this year. And the date selection is great feedback we will review further. Please feel free to add this to our Ideas Hub as feedback
7. **Is there a way to batch enable clients to receive automatic statements or do we need to go in to each client individually to enable them to receive automatic statements?**
    a. The "Send Statements" option can be enabled per client. The "Send Statement" option on client page is an existing option and will preserve what is already selected for this option.
8. **If there are no past due invoices and the past due watermark is toggled on, will it show the watermark?**
    a. When the past due watermark toggle is on, the past due watermark is only applied if the statement has an overdue invoice.
9. **Regarding Statements, what if the invoice is part of a consolidated invoice, with just the Consolidated # show on the statement?**
    a. The consolidated invoices will be shown on the statement in a separate section.
10. **I missed what this report is.... they follow up on delinquent invoices?**
    a. You can see contacts with outstanding or overdue balances from Finance > Accounts Receivable > AR Follow-ups tab.
11. **When sharing an accounts receivable log, does the system log a note on the client communication log?**
    a. When the accounts receivable log is shared, an entry is added in the AR Notes.
12. **If we choose automatic statements with only overdue invoices shown, will statements only go to those with overdue? Or will others get blank statements**
    a. If the option “Overdue Invoices Only” is selected and a client does not have overdue invoices, then a statement will not be sent to them.
13. **If the send statements box is NOT checked on the client profile, can I still send statements manually?**
    a. Yes, you can download the statement and send the statement manually. The “Send Statement” option can be temporarily enabled to send the statement manually when needed.
14. **Regarding Statements, what if the invoice is part of a consolidated invoice, with just the Consolidated # show on the statement?**
    a. If an invoice is part of a consolidated invoice, then the individual invoice does not appear in the statement. The consolidated invoice will appear in a separate section of the statement.
15. **I want our sales reps to have the option to opt into their customers to automatic statements. Is there a way to run a script to opt OUT all customers of statements by default, so that our reps can manually opt people in? All our customers are currently set to opt in, so it would be a lot of manual work to start with a clean slate.**

    a. Currently, we don't have a way to mass update this option. We are reviewing this option further but for the moment this is manual. Please add this to our Ideas Hub as feedback and additional visibility.

Receive Payments Revamp:

1. **Does this feature still have the option to complete jobs when applying payments?**
    a. Yes, the existing functionality is available in the feature. It can complete eligible jobs when applying payments.
2. **If a customer pays short, can we adjust that payment within the screen that shows all the invoices we can select?**
    a. Yes, you can make adjustments to the applied amount for each invoice. However, the total amount of selected invoices should match the “Amount Paid” field in the Payment Details portlet.
3. **When we have 1 customer with several contacts, those come up as separate customers. Is there something I missed in how I can apply the payment when several contacts are paid on one payment? Is there a way to make 1 customer & then have a tier down with each contact?**
    a. Using the Receive Payments feature, you can pay invoices from multiple contacts with 1 payment. You can search by client group or many orders. Search for Receive Payments in Knowledge Base in Syncore to learn more about this feature.

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

1. **For the ePOs, we ship on multiple accounts. Sometimes the supplier account, sometimes our account and sometimes the customer acct. Do we have the option to add these case by case?**
    a. Absolutely, you always have the opportunity to select your shipping method on each Purchase Order – whether you want to use one of your saved ones, the supplier’s or the customer’s, or you can enter a custom account information. For now, the supplier matching feature we saw today only applies to your saved shipping accounts in shipping settings. And since it is a one-time setup, we’d suggest doing that up front when the feature is live on Friday. Once matched, when you use any of those accounts, all ePO enabled suppliers can receive the information the way they need to receive it via ePO.
2. **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 use the account information you’ve already entered to find a match, and if there are multiple matches, it will suggest the best options to make the process more of a quick review and verification.
3. **Will this affect 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. The only difference is, once an account has been matched in settings, orders that use it are more likely to qualify for ePO with supported suppliers.
4. **With the Suppliers and UPS for example if we put ground for the overall method but can you override if needed**
    a. Absolutely! The shipping Method can be changed on the Purchase order from what is saved for the Shipping Account in settings.

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 a Gmail integration in the future?**
    a. The current release is only for Outlook. We are planning for other features like Gmail for 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 Outlook Integration as part of our early access program. It will be generally available and found in the Microsoft Store 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 email copies will only be stored in Syncore for **13 months**. After that, the ability to view the sent email from the magnify glass of the emails and attachments 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 years ago. The only change is that the archived email 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.

Miscellaneous:

1. **I have a quick suggestion would it be possible to search for clients using their phone numbers? I've been having a hard time identifying who called me without reviewing the call itself, and sometimes that's not possible, especially if we don't have a prior conversation logged.**
    a. This is great feedback! Please add it to the Ideas Hub for extra visibility.
2. **Can CSR change the shipping timeline at the Sales Order level if need to ship faster?**

    a. Yes, a CSR can change the Estimated Delivery Date.

3. **Has there been any discussion about increasing the size of files that can be attached in Syncore? Currently we are capped at 10MB to my knowledge? I ask as there are times when we have Artwork/Proof Files that exceed that size and can't attach.**
    a. This is another great point we will review further and make sure to vote on this in the Ideas Hub.