Winter Preview Webinar Q&A:

Reporting and Dashboard Questions:

1. Can you drill into the data on the Home Dashboard updates you showed? Does the Jobs have links to the details?
    a. Yes, you can click on any count to see the details where the link is available. The training for the release will cover this in greater details in January.
2. For the Home Dashboard, will you be just replacing V1 or adding more value?
    a. Our plan is to review and innovate all features as we migrate features into Syncore. We will continue to work with our partners to offer strong innovation into Syncore.
3. Will the Job Tracking Report show the primary rep in the results?
    a. Yes, that data will be available when we release this new report in January. In addition, we will be including a column to show the user responsible for submitting the order.
4. Will the Job Tracking report be able to be sorted by salesperson?
    a. Yes, the report has a search criterion to run the report for specific Primary rep and the report results have a column to show the Primary rep for each Job.

Proposal Questions:

1. It's not a question, but I'm glad to see that the SKU numbers for the items will be listed alongside the supplier names.
    a. Thank you for the positive feedback.
2. Is this the end of Proposal work? What is next?
    a. No. We will continue to innovate and bring an enhanced experience for the end clients as well as for the sales reps. Future enhancements like artwork approval will be included in the process. Expect more in our future seasonal releases.
3. Are there any discussions to create a bypass of the Quote stage where you can go straight from Proposal to Job?
    a. Yes. That's part of our approach to the Sales enablement process vision.   More research on how this would work best is still required.
4. Is there a way to deactivate Proposals so that I know what I have to follow up on?
    a. Yes, deactivating your proposal or through an Opportunity as a best practice will be released. All reporting will show the inactive status.
5. For the pricing grid, I would like for the price shown to be off the vendor's regular price…since it's off EQP / Facilisgroup cost, I think it's more labor-intensive to go in and change every column. EQP really should come in on higher qty and I want my reps operating off the normal price and not discounted.
    a. This is something that is not currently planned and will review further to determine the fit into the roadmap.
6. Will we be able to update supplier cost so we can actually see our true profit numbers?
    a. This is something the Syncore team is looking into and will share when we have more details.
7. Will I be able to inactive Proposals from the Active PQs page?
    a. Yes, both new Proposals and legacy Proposals can be set to inactive from this page.

8. Will the product wizard support selecting multiple color options?
   a. The new convert Proposal to Quote process combines the conversion work with the product wizard, to provide a new enhancement to support multiple colors that can be added to a product.
9. Can you help show how the newest Proposal updates fit into best practices?
   a. Yes. You will get requests for a release webinar in January, before the seasonal release. In that webinar, we will cover usability and hands-on demos, specifically around the best practices for Syncore.
10. Will there be some Early Access or Beta availability for Proposals?
    a. Yes. We have already engaged with several partners around our design and implementation and the next steps are getting this into some more hands before we go Live in late January.
11. There should be two Proposal options. Quick Proposal and Detailed Proposal. Sometimes you want to quickly send ideas where pricing is considered ballpark, and all the personalized project details are not needed.
    a. In the Winter 2025 Release, Proposals will have the option to disable the option to "Request a Quote" feature for your customer and the Proposal shows product information and project details are not needed. That will allow you to have a Simplified and Detailed view available.
12. Will you start offering short training sessions for our reps to test out the new features and best practices?
    a. Please reach out to your Success Team to discuss further and see what works best for you and your team. We will have a lot of different training material ready for the release.

Integration Questions:

1. Any thoughts on when there could be integration with QuickBooks?
   a. QuickBooks integration is something we keep on our radar as we enhance the Finance features. In parallel, we are investigating ways to get this integration to our partners as fast as possible.
2. Will Syncore be able to talk to PACE software in the future?
   a. This is not currently planned for a 2025 release.
3. Are there any integrations for Outlook or Gmail to talk with Syncore?
   a. We have done some investigation into email integration plug-ins, but this is not planned for a 2025 release. But we will continue to investigate where it best fits into our feature enhancements.
4. Are you going to look at supporting Punch Outs with ERP systems anytime in the near future?
   a. This is not currently planned for a 2025 release.

Miscellaneous Questions:

1. Any chance there is way to create a Quote from a Job? Sometimes a client wants to reorder something but asks to Quote first, would be nice to be able to repeat a Job as "a Quote" (to keep all the details) vs. an active Job before approval.
   a. Great feedback. We will add this for future sales enablement feature requests.

2. Will we ever be able to send our own emails without having it created from Facilisgroup?
    a. We have done some investigation into email integration plug-ins, but this is not planned for a 2025 release. But we will continue to investigate where it best fits into our feature enhancements.
3. Do you ever see a time where Syncore will have an App version?
    a. Creating an app is not currently planned.
4. Will we ever be able to save custom products for future use?
    a. Yes. This is highly valuable and on the roadmap for Syncore with no release date to share yet.
5. Will there be Corporate Job and sample request integration into V2 this year?
    a. We will be working on and require further research before we have a date to commit for those specific V1 functions. We also consider Program Orders in V2 a high priority as well.
6. When can we expect the feature to send client statements automatically and batched?
    a. This is targeted to be part of the A/R follow up & statements feature, for release in 2025.
7. Regarding Cash flow management, is there process of which we can send out email to ALL customers in one swoop stating new Terms/Expectations/Changes for 2025?
    a. A custom email can be made by Facilisgroup for you to send out to contacts in Syncore who have purchased from you or are opted in. If this is too narrow of a list, exporting contact's emails from Syncore and send through your email client such as Outlook or Gmail.
8. Are there any updates on Paya where a 'Pay Now' link will populate for consolidated invoices?
    a. Yes, we will be working on this feature to allow online payments for consolidated invoices. We will keep you posted as we plan this feature for an upcoming seasonal release.
9. Will Syncore be able to have larger files attached within the Jobs? We often have art files that are too large to attach to the Job and therefore requires we send it to the supplier outside of Syncore.
    a. Yes, larger files attachments are being reviewed currently with specific details to follow in a future release.
10. What is ETA for all these new launches for 2025?
    a. 2025 has four planned major seasonal releases. Winter is planned for late January. Exact dates for Spring, Summer, and Fall releases will be communicated later as we get closer to each release.