Spring 2025 Preview Webinar Q&A

Sales Proposals Questions:

1. Can clients make changes to their proposal after they have clicked “Request for Quote” and sent to sales?
    a. Once the customer submits, no further changes can be made and they should reach out to their sales rep to continue building on the sales experience.
2. Are there future plans to add "all media images" so that any available images for each product will automatically upload instead of having to go into each product and select "all images"?
    a. We appreciate your feedback! While this feature isn’t currently available, we’re always looking for ways to improve. We’ll take this into consideration for our future releases, and if we have any updates, we’ll be sure to share them with you!
3. When will clients be able to re-use proposals for ordering purposes after they initially use them?
    a. We really value feedback like this! While we can’t promise this feature just yet, we’ll be reviewing it as we refine our roadmap. Thank you for helping us improve Syncore!

Sales Tools Questions:

1. Can anyone run the Client Ranking Report? Or just the OKMs?
    a. All users can run this report, sales reps can only see their contacts and management can see all contacts.
2. Can we make client groups in V2? Can that be done at the rep level?
    a. Great question! We don’t have this feature at the moment, but it’s something we’ll review with the team. We really appreciate your feedback.

Job Updates Questions:

3. How do you show and hide alerts on the Job page?
    a. Using the alerts tab at the bottom of the job page, the radio options for Job Alerts, Contact Alerts or Both will show the respective alerts both in the table and at the top with the alerts.
4. Can I mark a Job as a repeat for the flag to show?
    a. The “Repeat” flag will show automatically based on repeating a Job in Syncore. The Repeat flag cannot be removed or added to the Job.
5. How to add a note and share the Job Log in one step?
    a. By using the “share” button, you will be able to add a note and share in one step.

Purchase Orders & ePO Questions:

1. How does the way attachments are added help send orders to more suppliers via ePO?
    a. By adding attachments directly to the line item on the PO, we can utilize the appropriate field when sending ePOs per the PromoStandards layout. So, ePO Suppliers can obtain the file, and know exactly where to use it without needing someone to decipher or make that connection. Some Suppliers can only accept it this way via ePO, so with this update, we are removing a roadblock and enabling more suppliers to integrate with ePOs!
2. Many times, file attachments are too large to attach. Will the maximum file size limit change so large files can be added?
    a. While the attachment size limits in Syncore will not be changing in the Spring release, it is something we will keep in mind as we evaluate future improvements.
3. Are shipping details entered by Sales or only by CSR?
    a. Shipping details can be entered by CSR, Sales Rep, Management, and Finance Users on the Purchase Order Page, but are typically entered by CSRs as best practice. The shipping details will need to be entered once it's converted to a PO.
4. Can you set defaults for the shipping details on the POs?
    a. Whether the order should be shipped on the "Supplier's Account", one of "My Saved Accounts", or an "Other Account" must be selected on the PO. When shipping on one of "My Saved Accounts" and a default has been saved in Shipping Settings, then the associated account information will be pre-filled in the remaining shipping details fields based on the default.
5. Who will manage saved client shipping accounts? Will each CSR need to save these individually? Will managers create this for the entire team to use? Finance?
    a. Managers will be able to access the new Shipping Settings page and save frequently used shipping accounts. Then, when shipping on "My Saved Account" on the PO Page, then all saved accounts will be available in a drop-down menu to select from, or if a default account is saved, then the remaining shipping details fields will be pre-filled with the default shipping account information.
6. Can you set a default shipping method by Supplier?
    a. For the Spring release, the default shipping method is not Supplier-specific, but is something we are considering as an enhancement in the next release.
7. Will there be an option to change default shipping info by the salesperson on the quote or SO before submitting the order?
    a. The Sales Rep can enter general shipping information on the Quote or Sales Order in the existing "Ship Via" field. The shipping details will need to be entered once it's converted to a PO.
8. Will you be adding a standard line on the PO's to ask for a proof so that these will go through for ePO forward.
    a. This is another great example of the need for standardization in Purchase Order data! For now, you will continue requesting proofs as you would today, and this will be in consideration for a future release.
9. How can we prove an ePO was sent?

a. There is a field on the PO Page called “ePO Status” which will update to one of the following statuses after the ePO is sent:
    i. Successful: The ePO was sent successfully to the Supplier.
    ii. Issue: There was an issue and the ePO was not sent and needs to be re-sent via PDF. More details are provided in a tool tip when you hover on the information icon.

10. Will there be more information regarding ePO and how it works?
    a. Yes. The release webinar next month will have more specific examples and details to show for the ePO process. In addition, for more information on ePOs, please refer to the Syncore Knowledge Base, or reach out to your SAA.
11. Are the ePOs being launched “real” ePOs that go directly into the vendor ERP without human interactions or are they Simple POs going by PDF?
    a. Suppliers can accept ePOs as Blank, Simple, or Configured, depending on their process and requirements. As we onboard each supplier into the ePO process, we navigate this with them to make sure the digitally transformed PO data being send by us and received by them is the most efficient for their business process. The goal of all ePOs is to be a touchless process.
12. When will Corporate PO's be taken into V2?
    a. We are in the beginning planning phases of transitioning Corporate POs to V2, and we will share timing as it becomes available! The good news is that we will start the development process in H2 of 2025 and will be able to provide updates on both Corporate and Program Orders in V2 later in the year.

Consolidated Invoices and Paya (Syncore US) Questions:

1. Can I make a partial payment when paying a consolidated invoice online?
    a. Similar to the current invoice payment process, partial payments cannot be made. The clients see the full amount (balance due) of the consolidated invoice and pay the full amount.
2. Can I change the online payments settings after a consolidated invoice is created
    a. Yes, the online payments methods can be changed by editing the consolidated invoice.
3. When will online payment be available to Canadian clients? When will the consolidated payment option be rolled out for Canadian distributors? Will the automated online payment be available for Canadians? Hi! I am assuming these Finance features are US release only, not Canadian?
    a. Online payment for consolidated invoices is currently available to US partners only. Online payments with Paya for Canadian partners is something we are currently working on and targeting for release in 2025.
4. Is there something similar to Paya available in Canada?
    a. Paya is the gateway of choice. We have had success with the US partners and now that Paya has expanded their services in Canada, we are excited to bring this to our Canadian partners.
5. Can consolidated invoices only be made on invoices associated with one customer or can multiple customer invoices be included (i.e. 3 different contacts in one company)?
    a. You can select invoices across any number of different contacts and client groups and combine them to form one consolidated invoice.

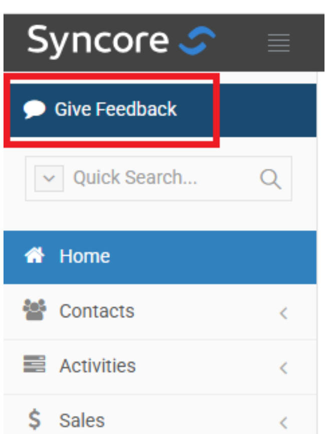
6. The online payment via credit card or ACH, does it just apply to consolidated invoices, or can it be for a single invoice?
    a. When a client makes an online payment for a consolidated invoice for the full amount, the payment is automatically spread across and applied to all the individual invoices that are part of the consolidated invoice.

Integration Questions:

1. Any thoughts on timelines for integration with QuickBooks?
    a. QuickBooks and Hubspot are the first 2 integrations that we are piloting this spring in limited availability with select customers. Once we prove out these integrations, we will make them generally available and provide an update on potential pricing.
2. I'm working with a Facilis partner on integrations today. Can I use these integrations as well?
    a. Many partners have developed integrations over the last few years since we released our APIs. As we pilot and grow this part of our business, you may choose to work with us to leverage our embedded integrations tools and continue to work with what you have today. In summer, we'll provide a more detailed roadmap of which integrations we plan to pre-build as well as how we can work with you on custom engagements.

Miscellaneous Questions:

1. What is ETA for all these new launches across 2025?
    a. 2025 has four planned major seasonal releases. Winter was completed in January. Spring will be available late April. Summer is projected for late July. Fall release will be communicated later as we get closer to each release.
2. Could you remind me where the hub is, please?
    a. When you are logged into Syncore, go to the Give Feedback option at the very top left:



3. When will Paya be integrated with Commercio?

    a. As of today, there is no plan to add Paya to Commercio, which currently supports both Payflow Pro and Stripe.

4. Can you share a URL for that QR code?
    a. The URL to access the QR code can be found below. Attached is the URL and copy of the screen shot. https://landing.facilisgroup.com/syncore-prebuilt-integrations

5. What is the future for the TSC websites?
    a. TSC is important to partners for its curated catalogue as well as client payment gateway. As we build more end client-facing features, such as proposal web pages, we will be reviewing how these features overlap and how we can bring partners a better experience.
6. What about graphic services portal? Would like the attachments in graphic services linked to a tab on the job page!
    a. Thank you for the great feedback! While linking graphic services attachments to a tab on the job page isn't scheduled as part of the Spring release, we understand how this could improve your workflow and will keep it in mind for future enhancements.