Spring Release Live Webinar Q&A:

General Questions:

1. Where can I post feedback?
   a. In Syncore, at the top left in the side menu is a button to click Give Feedback. From this page you can create, vote, and comment on feedback. A great opportunity to be heard.

Sales Proposals:

1. Can clients make changes to their proposal after they have clicked "Request for Quote" and sent it 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. Is there a feature on the pricing grid where you can checkmark a box to update all price breaks at a 45% GPM or do you have to manually update each price break in that GPM column?
   a. In this new update, the GPM is set per pricing grid. Thank you for your feedback. We will review it further!
3. Great updates! Can you advise if we can move an already existing proposal to rename it as a Collection for future proposals? So that we do not have to add items individually.
   a. Happy to hear you're liking the updates! You can add individual products to a collection from the product's menu. Thanks for this additional feedback, and we will review that idea further with the team to see if we can make the experience even better.
4. On the product wizard and quote page as we go through the product details, there is a line for what the product color is at decoration time. Since we already ask for the color at the top line what is the purpose for this line?
   a. The "item color at imprint" is further information to share with the supplier, decorator or customer if needed. If a product has multiple colors, you can clearly say that the decoration is on the specific color of the product. This might not be needed for every product and can be skipped if not needed.
5. Is it possible to have the pricing tab shown on the proposal for each product when scrolling through to make updates? That way we can see which item needs pricing updates.
   a. In proposals, you can change the product view by clicking the gear icon to compact or tab. This can be helpful in how you manage proposals!

Consolidated Invoicing with Paya:

1. Can I use this with consolidated invoices I've already sent?
   a. Yes, for any outstanding consolidated invoice, you can either edit the consolidated invoice or email it again with the payment link.
2. 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.
3. Can consolidated invoices be made for invoices associated with one customer or can multiple customer invoices be included?
   a. You can select invoices across any number of different contacts and client groups and combine them to form one consolidated invoice.

4. Does this include quick invoices that are manually entered into Paya?
    a. This update is specific to invoices from Syncore, both individual invoices and consolidated. We don't currently have a way to connect quick invoices from Paya into Syncore.

PO Enhancements and EPO adoption:

1. Can you set defaults for the shipping details on the POs?
    a. A default can be set when shipping on one of “My Saved Account” options by setting the default in Shipping Settings. However, 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.
2. Can these updates be made at the Sales Order or Quote level by the salesperson or only at PO level by the CSR?
    a. Great question! Currently, the enhanced shipping details and line-item attachments are available on the Purchase Order only. While these updates can’t yet be made on the Quote or Sales Order, Sales Reps can still provide general shipping instructions using the existing “Ship Via” field and reference artwork or attachments through the Design Name or line-item comments. Once the PO is created, CSRs will have access to the full functionality to enter shipping information and upload attachments. Expanding these capabilities is something we're actively considering for the future to help streamline the entire process.
3. Many vendors want the billing zip code, if not the whole billing address, when shipping third party, is there a spot to add this info into the saved shipping account?
    a. Not yet, but this is great feedback for us to investigate further as we continue to work with our Preferred Suppliers! In the meantime, we suggest using the Shipping & Special Instructions.
4. Love the new shipping settings. Will there be a way to add those shipping numbers directly to a client’s account as opposed to the main interface so that when we use their third-party number show up instead of everyone's accounts to choose from?
    a. We are so glad to hear you like the shipping fields enhancements and thank you for the valuable feedback! For this release, the ability to save shipping accounts is on the partner level only, but we are considering adding the ability to save on the client account for the future.
5. On the ePOs, we are limited by the number of characters in the ship-to info field. Sometimes that makes it difficult to fit in all of the shipping info. Do you have a suggested workaround for that?
    a. Thanks for bringing this up! In situations where the Ship To address exceeds the character limits defined by the PromoStandards ePO format, we support sending the PO via Email PDF. This ensures that all critical shipping information is preserved and clearly communicated to the Supplier. While this scenario is uncommon and hasn’t been raised with our supplier process, we recognize it can occur and want to ensure you have a reliable alternative when it does.
6. Is there a current list of ePO suppliers in the KB?
    a. Yes, the current list of ePO suppliers can be found in the ePO Frequently Asked Questions KB article. We also capture that in real time as you create and send the PO, making it very easy for you to see when ePO is supported.

7. Using the new ePO, how will we know if the PO has been accepted or has an issue. Do we have to go and look at them or will there be an email notification so we can move on and still know if there is a problem.
    a. We do capture the status of the ePO live and in real time in your PO process with a visual label to let you know ePO is ready for you. Sending via ePO does not change any ability to communicate with the suppliers, it just makes it more efficient for the supplier to process the order.

Syncore Jobs and Improvements:

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. How to do 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.

Miscellaneous:

1. Are there any dates or info to share for the upcoming summer release?
    a. Summer release will be hot on the heels of the Facilisgroup Summit in July in New Orleans. We are targeting some high partner value areas, like Credit Card Surcharges, that we will talk more about leading up to NOLA. It will be a powerful release focused on partner value areas.
2. Can all security levels see the entire Knowledge Base?
    a. Knowledge Base access is available to all, with some minor Admin exceptions.