Winter Live Webinar Q&A:

Webinar Questions:

1. How are you able to make the logo two different colors within the same proposal?
    a. You can change the logo product by product in the proposal. With this, you can set product #1 to show a white logo and product #2 shows a black logo.
2. Is the run charge in proposals coded or net?
    a. The run charge in the proposal pricing grid is a cost amount or can be called net. For reference, coded is a marked-up customer amount and net is a base cost amount without markups.
3. Will we be able to see the actual pictures of the different colored items?
    a. Product images are provided from the supplier. There currently isn't a way to tie product images to product colors and will review this as a feature improvement.
4. If you don't override the cost, will the grid then use the Facilis Cost to calculate the GPM?
    a. Correct, by default GPM is calculated based on Facilis Cost when applicable. If the Cost is modified, then GPM will be updated based on the new Cost.
5. What if clients want to add new products to a proposal after they have selected products?
    a. In this case, duplicating a proposal will allow the addition of new products and carry all current proposal product details into the new proposal.
6. For the margin on proposals, how do we know which price our margin is based on? Do we have an option to choose which cost while building?
    a. When Facilis Cost is shown, margin is based by default on Facilis Cost. If Facilis Cost isn't available or if Cost has been edited, then the margin is based on Cost. The Syncore team is reviewing the feedback to edit margin and choose if it is based on Cost or Facilis Cost.
7. Can you put in a cost to the proposal that is higher than the Facilis Cost?
    a. Yes, there are no limits to editing the product cost.
8. When a client responds asking for a quote, does the request go to the salesperson and/or all sales assistants?
    a. The request goes to the primary sales rep and their sales assistants.
9. Is it possible to tie a repeat job to an opportunity?
    a. Yes, when repeating jobs or editing any jobs, the opportunity can be changed by selecting in opportunity dropdown.
10. If the price is using the Facilis Cost, does it know if there are special stipulations on products? Like it is a product we do not get EQP on the particular product.
    a. When there are special stipulations for Facilis Cost, a yellow warning will appear above the pricing grid.
11. For multiple line items selected to convert with different suppliers, what is the best way to divide these into individual quotes?
    a. There are a couple options to easily do this while following best practices or your company procedures:
        - From the proposal page, click the convert at the top and select and deselect the products you want to convert.
        - From the proposal product review, deselect the products from the list and then select convert.
        - Convert one product at a time from the product "..." menu.
12. Will I receive an email notification when the customer submits their quote request from the proposal?
    a. Yes! The primary, secondary, and sales assistants will receive the same proposal notification email as you do today. This wasn't an option for your testing in the Early Access group, but it will be active for the release of proposals.

13. Can I use the “fixed quantity” option for apparel?
    a. The fixed quantity option is only available for products with one size or no size. Products like apparel or USBs cannot use the fixed quantity option.
14. What if my customer needs to order less than the minimum quantity?
    a. The minimum quantity is based on the first enabled pricing column. Set this to the minimum amount the customer can order. If the customer wants to order less, they can reach out to the sales rep to confirm they can order less and adjust the first column quantity.
15. What if the easy mockup image isn’t showing in the proposal?
    a. There are a couple things that can help. First, download and re-upload the image to your contact attachments. Next, make sure the image is less than 1000 pixels by 1000 pixels. Also, try not using the remove background option. Lastly, make sure the product image
16. 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 is always the best practice. All reporting will show the inactive status.
17. Will I be able to inactivate Proposals from the Active PQs page?
    a. Yes, both new Proposals and legacy Proposals can be set to inactive from this page.
18. Does proposals support quickly sending ideas where pricing is considered ballpark, and all the personalized project details are not needed.
    a. You know what your customer prefers and Proposals do support the option to disable the “Request a Quote” feature for your customer. In this case, the Proposal shows all the product information allowing you to have a Simplified customer view available.

Reporting and Dashboard Questions:

1. Are the changes on the Home Dashboard adding more value than the V1 dashboard?
    a. It does. For example- In V1, aging numbers are calculated based on invoice dates, while in V2, they are calculated based on terms and due dates. This provides a more accurate and actionable view of outstanding invoices, aligning better with payment terms.
2. Can I click the aging numbers (1-30, 31-60) to see the invoices only in that aging range?
    a. Currently, these aging numbers are not clickable. However, we are going to make these numbers clickable in the future. This will allow you to view invoices within a specific aging range, such as those that are 1-30 days overdue making it easier to manage overdue invoices
3. Does the Job Tracking Report show the primary rep in the results?
    a. Yes, there is a column for Primary rep in the report results. In addition, it includes a column to show the user responsible for submitting the order.
4. Is the Job Tracking report 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.

Feature Request Questions:

1. Will there be an option to add a second decoration location in the wizard?
    a. This is great feedback and something we will look to add in a future release.
2. Can you change the email address for the quote request to go to an account manager instead of the sales person?

    a. Thank you for your feedback! While this feature isn't available yet, we'll gladly review it as we plan future enhancements.

3. Can we create a collection of custom products?
    a. As we work on improvements to custom products, this is something that will be reviewed and improved.
4. What if we want to use the column cost to base our margin on but we don't modify the cost?
    a. Thank you for your feedback! While this feature isn't available yet, we'll gladly review it as we plan future enhancements.
5. Can you select a margin across the board for all products at once?
    a. Thank you for this feedback, this is something we will review to improve.
6. Will we have the option to add a proof request as a drop down to the quote and sales order so it can follow to the purchase order?
    a. Proof request and approval is something we will investigate for future release in Syncore.
7. Would it be possible for the client to communicate on the proposal before they've arrived at the point where they're ready to request a quote? Could this also include the ability for a group of people viewing the proposal to vote on an item(s), since many of the projects go through a "committee" process before they can move to a quote?
    a. Thank you for your feedback! While this feature isn't available yet, we'll gladly review it as we plan future enhancements.
8. When can we get a portal for our customers that will give them visibility on order status and tracking?
    a. Thank you for sharing your feedback! While this feature isn't available right now, we're excited to review it as we explore future improvements.