facilisgroup

Summer 2025 Release Preview Webinar Q&A

Credit Card Surcharges:

1. When will a convenience fee feature be available?
    a. This will be available as part of the Summer 2025 Release on July 25.
2. Who sets the name of the fee?
    a. Each distributor will work with Paya as part of their configuration to set the name and save it.
3. How do partners with Paya already turn this on?
    a. Reach out to Tracy @ Paya to have this setup for you. You can get help from your Success team if needed.
4. What does the partner need in Paya?
    a. Partners will need a new service or virtual terminal. It is the way to choose both the credit card and credit card with a fee.
5. Once the Credit Card fee feature is live, will the CC payment link be included without impacting the amount of the client's invoice? Since they may not choose to pay via CC?
    a. For the credit card fee feature, it will be added to the invoice so that the total is the same as it is today and if the fee is applied an additional item will be added to the total to show what to pay when paying by credit card. Very easy and intuitive.
6. With the convenience fee, I'm assuming it will just trigger at the time the customer attempts to make the payment with a credit card?
    a. When applying a credit card fee, it will show on the invoice pdf when sent to the customer and also show when paying online.
7. Will the CC fee also be available on sales orders/proforma invoice? Quote level to show the fee?
    a. The credit card fee will first be available on invoices and will be available on sales order/proforma deposits at a later date. There are no current plans to show this on the quote, but I appreciate the feedback.

AR Follow-ups & Statements:

1. What happens if a client partially pays their balance, will they still appear on AR follow-up list?
    a. Yes. As long as there is a remaining balance due, the client will continue to appear on the AR Follow-Up list. The amount shown will reflect the updated balance, helping you stay informed and follow up as needed until the full payment is received.
2. Is there a way to filter or sort the AR Follow-Up list based on balance size or client type?
    a. Yes, the list can be filtered based on client/company name, client group, follow-up date, any assigned issues, or overdue/current balance.
3. Can we customize the follow-up frequency or reminders for different clients?
    a. While follow-up frequency isn't automated per client, you can manually set follow-up dates and notes within the list. This gives your team flexibility to follow up more frequently with high-risk accounts or adjust timing based on client behavior.
4. Can multiple team members work from the AR Follow-Up list at the same time?

    a. Yes, the AR Follow-Up list is shared and live, so multiple team members can access it simultaneously. Assigned responsibilities and notes are visible to everyone, which supports collaboration and helps avoid duplicate outreach to clients.
5. I think I heard mention that finance follow-up could be assigned to other finance users. Can they also be assigned to admin users?
    a. Yes, follow ups could be assigned to finance as well as admin role users.
6. Will there be an option to send a statement on AR follow ups like on V1, and will we be able to attach the invoices to the statement?
    a. Yes, there will be an option to send a statement. We will later add the ability to send individual invoices along with the statement.

PO Enhancements and EPO adoption:

1. Some Partners had issues in the past where rush order deadlines were missed when sending as ePO. How will they know it won't get missed again?
    a. All orders indicated as RUSH orders will be emailed directly to the correct team that the Supplier has identified. So, the process to pull RUSH orders to the top of the queue, which for many Suppliers is still manual to a degree, will happen faster and reduce the chance of getting missed. And standard priority orders can realize the benefits that come along with sending as ePOs.
2. For client shipping accounts, can one of the saved accounts be saved as a "Default"?
    a. Setting a default client shipper account is not part of this release, but open to feedback. Also, if the client does have multiple accounts and one is their main one, you can indicate that in what you provide as the Account Name (for example, ABC Co.'s UPS Account – Primary).
3. Will the shipping accounts be selectable on the Sales Order or the PO?
    a. Right now, the Ship On fields with the drop downs for selecting shipping accounts is on the PO only, but it will be brought to the sales order as well in a future enhancement.
4. When POs are sent in via ePO, will there still be an option to cc specific contacts at the supplier?
    a. For ePOs, orders go into the supplier's system directly and do not include an email component, so any additional communications to the supplier should be sent separately.
5. Is there a way to import a single item from a previous order to a new one? Not looking to "Repeat Job" because we may not need everything on it. Looking for a way to create a new order and then import specific items from various previous orders.
    a. Importing individual line items from previous orders is not currently supported, but we appreciate you sharing this idea. We'll keep it in mind as we continue to evaluate future enhancements in Syncore.
6. Will the customer's shipping account populate on the Packing Slip?
    a. Not at this time, the shipping accounts are available on the purchase order feature only. When we look to include this on the sales order we will review the packing slip at the same time.
7. Also, will those shipping accounts be available for the Sales rep to select or is that a procedure for the CSR to select when sending the PO?
    a. For now, the Ship On selections are available only on the PO for the CSR to select, but the same functionality will be available on the Sales Order page in a future enhancement.
8. For the Digital Proof add-on, is there going to be an option for a Pre-Production Proof Request?

    a. At this time, the Digital Proof Request feature will be focused on digital proofs, but the process for Pre-Production proof requests is also being considered as a future enhancement.
9. Will proof’s be a line order for direct enter?
    a. The Digital Proof request enhancement is focused on when a Digital Proof is needed from Suppliers for your review prior to production. This does not include the option for it to be entered as its own line item with cost associated. We are also looking at enhancing the pre-production proof process as well in the future.

Syncore Job Tags and Improvements:

1. Who can create company job tags?
    a. Management, finance, and admin can create job tags. All users can apply job tags to the job.
2. Do job tags carry over when repeating a job?
    a. Not currently in place but will keep an eye on feedback on the feature usage.
3. Will there be a way to assign tags in bulk to preexisting or completed jobs?
    a. Currently, job tags can only be applied from the job page but can be added to a job in any status.

Outlook Email Connector:

1. Are there any plans to add a similar feature for Gmail (Google Suite) users?
    a. Yes. After successful launch and enhancements to the Outlook Connector are completed, we will look to support Google.
2. Once this is launched, will you teach us how to connect this? So excited.
    a. Absolutely. Full access to all support materials and deployment will be available.
3. Will there be an integration between follow-up dates in Syncore with Outlook calendars?
    a. Definitely a future enhancement we are looking at adding.

Miscellaneous:

1. When are CPO's getting updated to V2?
    a. A priority project in H2 of this year is to start working on Program Stores Orders. This will be a new workflow and feature set to replace what exists in V1 and empower all different stores integration with Syncore. Corporate POs will be included and enhanced in this process, also.
2. Any chance you will extend the timeline to revise an invoice once it is tax committed to be longer than the 48-hour window?
    a. There are no current plans to extend the tax committing process.
3. The #1 request seems to be tax on quotes. Any idea when that is likely to be addressed?
    a. We are planning upcoming work, later this year, for more improvements to the sales enhancement process. Making quotes part of the client experience, as well as taxes, are targeted for improvements.
4. Integrations don’t have a price yet?

    a. The exact price is still being finalized. But it will be very competitive against any 3rd party integration costs partners would incur. We aim to provide more details on this during the NOLA event.
5. Are integrations part of the summer release?
    a. We will be rolling these out selectively throughout summer but not tied directly to the Summer Release. QuickBooks and HubSpot are the leading integrations you will see highlighted. More details in New Orleans coming.
6. Just wondering if you'll add a field in opportunities for an event date that is different than the expected close date?
    a. This is great feedback that we will make sure to add to our Ideas Hub.