facilisgroup

Summer 2025 Release Webinar Q&A

Summer Release:

1. Where can we see a copy of this presentation to roll out to a larger organization? Is there a recap of these changes?
    a. This presentation is being recorded and will be posted for you! You can watch and see more about the Summer Release details here - https://landing.facilisgroup.com/syncore-summer-release
2. Are these features from this webinar available now?
    a. Everything you see in the webinar today will be released on Friday, August 1!

Credit Card Surcharges:

1. 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.
2. How do partners with Paya already turn this on?
    a. Reach out to Tracy Neidens (tneidens@sagepaymentsol.com) at Paya to have this setup for you. There is a form to fill out and a setup process she will guide you through. At any time, you can get help from your Success team, if needed.
3. What does the partner need in Paya?
    a. Partners will work with Paya to have a new, secondary service or virtual terminal. This enables the ability to choose when your customer will pay by credit card and when a customer will pay with fees.
4. Can I choose which invoices have the fee?
    a. Yes, you can choose per invoice to apply a fee or not.
5. How will the fee amount be shown to the customer?
    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 balance due will be added to show what to pay when paying by credit card.
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.
8. Are Paya credit card surcharges capped at 3%? If so, why cap them?
    a. Yes, this is a limit set by Visa and Paya and many state regulations. Syncore will pull that relevant percentage directly from Paya.
9. Why can we not increase the credit card fees to 3.5% to recoup all our fees?
    a. Many states limit the fee percentage, as well as Visa's terms and conditions cannot exceed 3%. Paya will help you set the percentage in your portal.

10. What roles have access to initiate the credit card surcharge on invoices?
    a. Finance and Admin have access when changing the SO to invoice status and can choose to apply surcharge.
11. Can you apply the CC fee to our quotes and sales orders?
    a. Currently the fee is only available on the Invoice PDF. You could also add a notice in your Quotes or SOs as a note.
12. Is the credit card fee a universal change to all sales orders or variable on each order?
    a. Through Paya and Syncore, only one percentage can be set for all invoice transactions.
13. Will Paya credit card fees be added as a cost on invoices paid with Paya where a credit card fee is not passed through to the client?
    a. This is a great feedback item we will investigate further for a future release.
14. How do I know who my Paya representative is?
    a. You can reach out to Tracy Neidens at tneidens@sagepaymentsol.com or your success team contact for any questions.
15. Is the Fee feature available on deposits?
    a. For this first Summer Release, this is for Invoice specific emailing only. We will be adding this to Deposits as quickly as we can in a future release!
16. Will we have the ability in settings to have the credit card surcharge always be shown when emailing invoices? Or will we have to check the surcharge box every time we send an invoice?
    a. For the Summer release, it will be set per invoice. We plan to enhance this for improved rules and defaults in a future release.
17. How does this show in the order?
    a. I would recommend watching this detailed video to show how this will show in the SO/Invoice: https://syncoresupport.zendesk.com/hc/en-us/articles/39462465519003-Paya-Credit-Card-Convenience-Fees-Video
18. I am still using V1 and have not done any orders in v2. Is there someone at Syncore to actually call me and help me navigate a few orders? Or is there a printed page that I can print and follow each step?
    a. You can reach out to your success or concierge team anytime for questions. There are also videos and guides in the Knowledge Base, like this one - https://syncoresupport.zendesk.com/hc/en-us/articles/18034366718619-Standard-Invoicing-Video
19. Can the Fee be added to SO in both V1 and V2?
    a. Online Payments is only available in Syncore (v2).
20. How long will it take to set up the new cc fee with Paya and Syncore?
    a. Once Paya has your form and submitted, there is a 30-day onboarding time by Paya and Visa.
21. Do we need to sign up with them separately?
    a. If you are new to Paya, go to ***Syncore > Settings > Online Payments*** and click through the buttons on that page to get started.
22. Is Paya US only and not available in Canada?
    a. Paya Canada support for all existing functionalities will be released about 1 month after US. Early September is the target. We will do a special webinar for everything around Paya Canada in August.

AR Follow-ups:

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.
    All the columns in the list can also be sorted.
3. 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.
4. 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.
5. Do I need to mark the AR tracker active for the client to show it on this AR Follow-up list?
    a. No, irrespective of the AR tracker being active or inactive, clients appear on this list whenever there is a follow-up date set or there is an invoice with a balance due for the client.
6. Will Overdue status now follow the actual client terms instead of marking everything over 30 days past due?
    a. Yes! Moving forward through Syncore (v2) invoices will use the proper terms per invoice to calculate current and overdue invoices. You can see this already on the V2 Home Dashboard at the bottom in the Finance section.
7. AR Follow Ups, do you have to assign an individual? If you don't, will everyone be able to do follow-ups?
    a. You do not need to assign an individual to the AR tracker. All finance and admin users will be able to see all follow ups for those assigned and not. A user could filter to only see their own if they would like.
8. On AR Follow ups, will there be an option to send statement sent to the client together with the invoices?
    a. More updates to come to the AR Follow Ups to work with statements and invoices! You will see this in future releases.
9. Is the AR tracker in V1 going away on Friday?
    a. No, it will still be available and does not have a "going away" date yet.
10. Will the Sales Rep be able to assign follow-ups for their assistants or just Management?
    a. Currently Finance and Admin users only will have access to the AR Follow Ups.

PO Enhancements and ePO:

1. 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 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).

2. Will the shipping accounts be selectable on the Sales Order or the PO?
    a. For now, the Ship On drop down selections are available only on the Purchase Order page, but the same functionality will be available on the Sales Order page in a future release.
3. When POs are sent in via ePO, will there 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.
4. Does the new Proof Request feature also include an option for a Pre-Production Proof Request?
    a. The new Proof request feature is focused on when a Digital Proof is needed from Suppliers for your review prior to production. We are also considering enhancing the pre-production proof process as well in the future.
5. How does the priority field coordinate with the job priority set when submitting jobs? (critical rush, critical, standard, etc.)
    a. For this release, Priority field will always default to Standard priority on the PO Page and can be updated to Rush if needed. As always, we are open to feedback!
6. Will Sales Reps be able to choose the client shipping in the Sales order also?
    a. For now, the option to select the shipping details from a drop-down are only on the Purchase Order page, but the same functionality will be available on the Sales Order in the future.
7. For companies who have a CSR team that processes orders, are you able to add a "Send All Order Information To" box similar to the "Request Digital Proof" box so the entire team can receive order information?
    a. In this case, you could create a group email in your Outlook or Gmail setup to send an email address to multiple people.
8. Who are the suppliers using ePO?
    a. Here is a resource from the new Knowledge Base that we will keep updated on progress with suppliers - https://syncoresupport.zendesk.com/hc/en-us/articles/39297820628763-ePO-Suppliers
9. It's important to be able to put multiple email addresses into the request digital proof field for redundancy.
    a. We appreciate the feedback and understand this case. We recommend creating a group email address that you can input here to be sent to multiple users. At the moment, PromoStandards and the supplier configuration only support one email address for this request.

Job Tags:

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. What reports use job tags?
    a. The Job Search, the Sales Analysis report and the Job Tracking report all support job tags. If there are other reports that you would like, please share them in the Ideas Hub.
3. 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.
4. 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.
5. Will the job tags replace "issues"?
    a. Job tags will not replace issues. Job Tags can be used to track sales and metrics, margin of jobs in the Sales Analysis report and process times in the Job Tracking report. The tag can be used to flag a Job with an issue for further reporting and metrics later but not to be confused with the CSR Issue for order processing.

Other Questions:

1. Will there be taxes on Quotes?
    a. This is a much-requested feature that we are looking to enhance in a future release as we add on to the Sales enablement process.
2. How can we duplicate a contact?
    a. There isn't a way in Syncore right now to duplicate a contact, but if this is something you'd like, please go vote on the item in the Ideas Hub feedback page!