

## 2024 Syncore Fall Release Webinar Q&A

### Proposals:

**What are the new automated statuses for proposals? Are statuses updated manually?**

**A:** The new statuses for proposals are Draft, Sent, and Submitted. All proposals will be created in Draft status, then changed to Sent once the proposal is emailed, and finally changed to Submitted once the customer submits their selection.

**Any improvements to pricing for additional sizes or options?**

**A:** Yes, proposals will allow for multiple pricing grids in a product to show different pricing variations based on color, size, or decoration method.

**Does duplicating a product keep any customized changes?**

**A:** Yes, duplicating a product within a proposal, or duplicating the proposal, will keep all product customizations and edits.

**How many custom images can I add to a product?**

**A:** Previously proposals allowed for 4 custom images, and with the proposal updates 7 images will be allowed per product.

**Is the imprint area preformatted to reflect actual space on the item?**

**A:** The imprint area is set by suppliers on a product image. This might not always reflect the imprint area on a product, and if so, a custom image can be uploaded.

### Consolidated Invoicing:

**Can we search consolidated invoices in receive payments?**

**A:** Yes, you can search for the consolidated invoices in receive payments and apply payment to all the invoices included in it.

**Can we add/remove invoices from a consolidated invoice after it is sent?**

**A:** Yes, you can edit, add, or remove invoices from a consolidated invoice after it is sent. Make sure to resend the updated copy of the consolidated invoice to the client.

**Does quick search return consolidated invoices?**

**A:** Yes, if you search for the consolidated invoice number in the quick search, it will list the matching consolidated invoice in the results.

**Can consolidated invoices be tracked and followed up on in the AR tracker?**

**A:** We are actively developing the next finance feature, which will include AR Follow-Ups. We appreciate your feedback and will research/work on incorporating it into the feature set.

**Will there be an option to pay via credit card on consolidated invoices?**

**A:** Thank you for the feedback! We are currently exploring the option to allow credit card payments on consolidated invoices.

**We have many split shipment invoices. Will these orders be made available to be part of consolidated invoicing soon? Can we add reports attachments to consolidated invoices?**

**A:** split shipment invoices can already be added to the consolidated invoices. Any document/file present in “Job Attachments” is available to be sent as an attachment when sending the consolidated invoice email. If you want to send a report, or the split shipment details file, add them to the “Job Attachments” tab and the file will be available to be selected on Step-1 when sending the consolidated invoice email.

**Will consolidate invoices show as consolidate on the customer statement or will it show as separate jobs still?**

**A:** We are actively developing the next finance feature, which will include statements. We appreciate your feedback and will research/work on incorporating it into the feature set to show consolidated invoices on the statement and not as separate invoices.

### Reporting:

**Where is the profit analysis report located?**

**A:** The Profit Analysis report is located in Syncore under **Reports > Finance > Profit Analysis Report**.

### Avalara Account Migration:

**Who should I go to with questions regarding the Avalara Account Migration?**

**A:** Please reach out to your Strategic Account Advisor or Concierge for assistance.

**Is Avalara still only available in the USA and not in Canada?**

**A:** Yes, Avalara is only used for US tax transactions.

**Will the Jan 2024 transaction reports be moved over from our old account to the new account since it was not changed at the beginning of 2024?**

**A:** None of the transactions will be automatically moved over to your new account, but if you need to access your old account for any reason or need any transactions prior to your migration, please contact your Strategic Account Advisor or Concierge.

**Will the updates help with Syncore going down often?**

**A:** In parallel to feature enhancement development work, there is a dedicated team of people working on Syncore’s availability and performance. We monitor every area of Syncore in real-time, including page response times and do maintain an average uptime of 99.997%. That said, we still encourage all users to report instances of reduced performance that affect workflow and efficiency or create frustration. Reliability remains a top priority for the entire team and improvements in these areas are happening frequently and consistently and are not tied or bound by seasonal release schedules.