

User Set Up

Go through Personal & Admin > Settings > Users:


Prior to creating users it is suggested that you first create the roles. You choose the role as part of creating the user.

Another tip is to start with the higher ranking people within your organization and move downward. You will be asked to list whom the person reports to and can only choose it if the person they report to has been chosen.

Final tip is that you do NOT have to create an entirely new user for every person. You can use the “DUPLICATE” button on the top right of any user file.

View Audit Trail – allows you to see a detailed description of all the actions the user has made in fuse5.

This is where you will want to manage users who can access Fuse5. Every user will need to be created in the settings > User > Create New User section (NEW USER button is at top right of screen).

When creating each user you will need to fill in their Login and Role information, ordering, personal, Benefits, Photo, Sound Notifications, and their Home Page Components. Note that only sections with a red  are required fields and everything else is use optional.

***Note:** Most line items within the user set up allow you to hover over a line item and get a further explanation as to what that line is for.*

1. Login & Role

Login Name – the name they use to log in (first initial followed by last name is not uncommon)

Password – password for logging in (users CAN change their own log in after logging on the first time)

Confirm Password – same as above

User Barcode / Barcode Required for Login - Users can be set up to scan a barcode instead of entering a user name when logging into Fuse5. Users will simply scan their personal barcode and then enter their password to log in.

Two settings enable this functionality: 'User Barcode' and 'Barcode Required For Login'. These settings can be found by going to Personal & Admin > Settings > User > Select a user. Click into the 'User Barcode' field and scan the barcode you wish to assign to the user, then click Save.

If 'Barcode Required For Login' is set to 'on', then the user will need to scan their barcode in order to

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log in and WILL NOT be able to type in their user name to log into Fuse5.

Login & Role	
Login Name	admin
User Barcode	
Barcode Required For Login	No
Middle Name	
Department	
Reports To	
Status	Active

Job Title – your organizations title for that person

First Name, Middle Name & Last Name – their name

Department – your organizations name for their department (if you have departments)

Admin – check this box if you want the user to have “admin” privileges (access to everything) in addition to their role.

Reports to – name of the person they report to (must use the change button so the person they report to must be created first

Role – determine the Fuse5 role you want this user to have

Status – Denotes if the user is active or inactive

Password	<input type="button" value="Change Password"/>
Job Title	
First Name	
Last Name	Administrator
Admin	on
Role	Admin

2. More Information

Delivery Module User – does this user need access to the delivery module? Yes or No. Yes if you want to assign deliveries to this user.

Online Orders Notification – pop ups when a web order has been put placed and needs to be finalized

Sound Notifications for Store Transfer – does the user need to hear an audio sound when a Store Transfer comes through?

Over ST Receive Notification – When set to yes then online ST will pop up on your screen when they are placed and need finalized.

SO Default Transaction Type – The default transaction type that shows up when this user does sales orders. Normally will be normal sales, but if the user does primarily returns you may consider changing this.

Default Location – What is the users default location (if you have multiple locations). NOTE: If you change a users location mid-day, the user will need to change their location for the day at the top right of any Fuse5 screen for the system to recognize the change. The next day, when they log in for the first time, Fuse5 will recognize their new location. There is a Custom Setting called Other Location Allowed by Roles, you may have to give a role temporary access to other locations in order to do a mid-day location change.

PO/ST – Product Details Default Cursor Field – when creating a PO and adding product individually, do you want the cursor to default to Bar Code, Line Code, Product #, or Product Name

Sales Accounts - If the employee is a salesperson, you can list the accounts that they call on

Show Other Location SO Popup – When the user logs in, do you want them to see a pop up box that shows sales orders made for that day at other locations? Yes or No

Make Adjustments & Change SO Payment Method – When doing ROAs there is the option to do Adjustments to an account balance as well. If you set this to NO, the user will NOT be able to make adjustments. Set to YES, and they can make adjustments.

Printing Format – usually choose HTML, based on your IT set up. Used for printing invoices.

Printing Method - Print all docs via User's PC - This will be the default setting and will print out documents based on the users PC settings.

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Print all docs via Print Server - All documents will be sent to, and will print from the Print Server page.
Hybrid - Print local docs via User's PC and other location docs via Print Server page.- This setting does exactly what the name says it does, it will print local docs with the user's PC settings and other location docs with the Print Server page.

Show Inbound ST Notification – should the user be notified with inbound store transfers are occurring

More Information	
Delivery Module User	No
Online Orders Notification	Yes
Sound Notification for Store Transfer	Yes
SO-Product Details Default Cursor Field	Product #
Default Location	Auburn Branch 05 ?
PO/ST – Product Details Default Cursor Field	Product #
Sales Accounts	
Show Other Location SO Popup	Yes
Make Adjustments & Change SO Payment Method	No
Report Default Page	Report List
Show Inbound ST Notification	No

Show PPV Notification - Pending Part Verification requires users verify sufficient quantity after picking and in order to finalize the Sales Order.

Show ST Print Notifications – When set to YES, the user will have the ability to set pending store transfer alerts to automatically print pick tickets.

Create ST Alert

Add Report Alerts for Training

Generate Report on :

Every : ☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday ☐ Saturday ☐ Sunday

Every : -- of Each Month

Time : 00

Create ST : ☒ Save as Pending ☒ Post to ST Print notification

List of Alerts for Training Report

Default Calendar View – this references the calendar under SALES MANAGEMENT

Sound Notification for Web Orders – Should the user get an audio sound on their computer if a web order comes through?

Finalized WO Notification For Selected Accounts - - will cause the FINALIZED WEB-ORDERS FOR SELECTED POS ACCOUNT to pop up when account is selected at POS that has finalized Web orders from that date. This can be useful if you are shipping sales orders and want to consolidate for shipping purposes.

SO – Product Details Default Cursor Field – if the user is going to be creating sales orders, should the cursor default to Barcode #, Product #, Line Code or Product Name?

SO Default Location – if the user processes a sale, do you want that sale to be applied to the users default location or the account default location. This is only used for multiple stores and can serve as a “call center” function if you have users in one location making sales you wanted credited to another.

Organization Access Level - This allows you to specify what locations the user will have access to for a number of Fuse5 features including Reports, Fuse5 Dashboard, & Sales Targets. The organizational levels are set up in custom settings.

Show accounts with location – allows you to determine which accounts a user will have the ability to sell to at the Point of Sale.

All - will show all accounts in SO accounts list.

User Location - will show Accounts where account default location is same as user default location, if user default location is not blank.

If user default location is blank you will see all accounts

Transfer to Website – Yes-permission to use credentials to login to the administrator portion of the front-end customer website and modify it – old functionality, no longer relevant

Default Lead View – Default lead view for sales management; specific for outside sales people using the CRM – old functionality, no longer relevant

Push ROA to EOD – If the users processes Received on Accounts (ROAs), should they be pushed to the End of Day (EOD) module? If set to NO, then the user is not available as an option to do EOD by sales person and if you do a buy location EOD, any ROAs that they processed with NOT show up.

View Product CC/Alternate Cost on POS - This setting is used to prevent front line employees from seeing the wholesale cost on parts. It controls 2 things.

1) In the Sales Order screen, on the SP (Sell Price) popup. If this is set to "Off", then the Cost

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information will not be visible on this popup. Only M# fields will show.

2) In the buy out popup. If this is set to "Off", the user will not see the product cost information in the buy out. "

Report Default Page – either default to all reports, or to favorites if the user has created a favorite list

Account Rename Authority -gives user the ability to rename accounts (recommend not giving this authority to too many)

Show Outbound ST Notification – should the user get a pop up when there are outbound store transfers

Default Register - EoD by Cash Register allows users to run the end of day reconciliation by register instead of location or user. In order to implement this functionality you will have to name your registers with '+ Add Option' in your custom settings and assign users a 'Default Register' in the user settings. This will also add a new drop-down at the point of sale for 'Register'. If the 'EoD by Cash Register' option is turned on in custom settings and no 'Default Register' is chosen in user settings, Fuse5 will prompt users to choose their register in a drop-down at the point of sale

Default Calendar View	This Week
Sound Notification for Web Order	Yes
Over ST Receive Notification	No
SO Default Location	Account Default Location
Show accounts with location	All ?
Transfer to Website	No
Default Lead View	Today
Push ROA To EOD	Yes
Printing Format ?	HTML
Account Rename Authority	off
Show Outbound ST Notification	No

Default Register	
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3. Personal Information – pretty much self explanatory and only necessary if you want to document in Fuse5. Hover over any line item and a pop up will give further explanation.

Personal Information			
URL to Webmail Client	http://webmail.gofuse5.com	Office Phone Number	
Office Fax		IM id	
Date of Birth	--	Home Phone Number	
Emergency Contact Name		Mobile Number	
Emergency Contact Number		Street Address	
Electronic Signature		City	
Social Security Number		State	
Drivers License Number		ZIP Code	
Notes		Personal Email	program

4. Employee Benefits – pretty much self explanatory and only necessary if you want to document in Fuse5 or use the time clock option

Hourly or Salary: 1. Login Only – user will not clock in or out of the time clock function in fuse5. 2. Login and Clock In – user will be forced to use the “Fuse5 Clock In/Out System”. When they log in it will tell them what time they clocked in. When they sign out it will give them the option to **CLOCKOUT & SIGNOUT** (this takes them out of fuse5 and OFF the time clock) or they can simply **SIGNOUT** (this leaves them on the time clock but out of fuse5). 3. Clock In Only – user will be prompted when logging in to **CLOCK IN ONLY** (logs them into the time clock, but not into fuse5). They would then log in to Fuse5 when they need to exit the time clock. These users have NO access to Fuse5, just to the time clock.

Employee Benefits Information			
Hourly or Salary	Login Only	Total Personal Days	
Health Insurance	Yes	Personal Days Remaining	
Insurance Plan		Total Sick Days	
Supplemental Insurance	Yes	Sick Days Remaining	
Supplemental Insurance Plan		Holiday hours	0

5. Photograph – can upload a photo of employee if you want, this is only used in the delivery module. You must be in EDIT mode in order to upload a photo. (EDIT is at top right of the user settings)

Photograph

Upload Photograph

6. Sound Notifications – fuse5 has a default sound notification, but users can upload alternate sounds from an MP3 file. This is specifically for the sound notifications available under the MORE INFORMATION section covered previously in this document.

6. Sound Notification

Specific Sound For Online Web Orders	
Specific Sound For Online ST	

7. Time-off / Personal Days Detail – can be used to request personal time off. This functionality can be useful, but should not be used to override any pre-existing human resource tracking tools you currently use.

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Time-off / Personal Days Detail

Request Days Off

Date :	02-26-2013
Time :	Start Time : 01 : 00 AM End Time : 01 : 00 AM
Type of Request :	Personal

Save

Cancel

Show TimeOff List

Hide TimeOff List

8. Time Card – allows visibility into the users time card if the user is required to use Fuse5 to log in and out for time keeping purposes.

Time Card

ADMIN	04-01-2013	04-02-2013	04-03-2013	04-04-2013	04-05-2013	04-06-2013	04-07-2013
In							
Out							
In							
Out							
In							
Out							
In							
Out							
In							
Out							
Total	0.00	0.00	0.00	0.00	0.00	0.00	0.00
						Total Hours For Week	
						Total Overtime Hours	--

Signature : _____

9. Login History – allows you to see the log in history for the selected user.

Login History

Showing 1 - 10 of 36

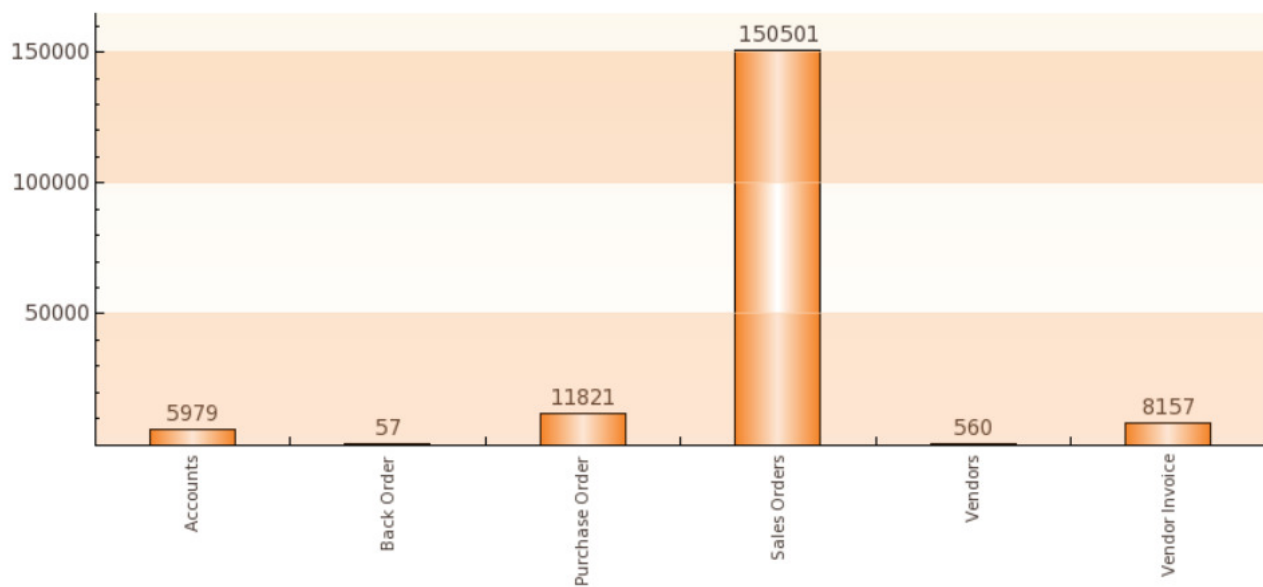
1 2 3

User Name	User IP	Sign in Time	Sign out Time	Status
jBond	202.47.116.5	2013-02-21 03:50:46	---	Signed in
jBond	202.47.116.5	2013-02-21 03:10:22	2013-02-21 03:50:11	Signed off
jBond	202.47.116.5	2013-02-21 03:09:00	2013-02-21 03:10:19	Signed off
jBond	108.160.239.95	2013-01-10 13:21:45	2013-01-10 13:22:30	Signed off
jBond	180.211.115.162	2012-12-20 23:03:53	---	Signed in

10. Home Page Components – suggest that you leave these in SHOW mode, then as training progresses and you come across things you wouldn't want certain users having access to , we can make adjustments. This information is displayed on the users screen by clicking the fuse5 logo at the top left of the screen.

Home Page Dashboard – enable or disable the overview graph

Home Page Dashboard



Top Accounts – Top 10 accounts based on Sales YTD from account record.



A screenshot of a spiral-bound notebook with a yellow cover. The title "Top 10 Accounts" is centered at the top. Below the title is a table with two columns: account names and account numbers. The table contains five rows of data. A vertical scrollbar is visible on the right side of the table.

Top 10 Accounts	
CASH ACCOUNT	000500
ROBERT T SUGGS JR.	000304
SUGGS AUTO SALES	9070
robert Iglehart	A5028
ZEAGLER AUTO SERVICE, INC.	10000

Upcoming & Pending Activities – Using the SALES MGMT > SALES EVENTS, when the user creates a sales event that is in the future it will display here



A screenshot of a spiral-bound notebook with a yellow cover. The title "Today's Upcoming Activities (1)" is centered at the top. Below the title is a link "Show : Today | All". Below this is a table with one row of data. The table contains one row of data. A vertical scrollbar is visible on the right side of the table.

Today's Upcoming Activities (1)	
Show : Today All	
1	 Meeting About Fuse5 Custom report

Top Sales Orders – Last 10 Sales Orders in descending order.



My Top 10 SOs	
BB13132092	\$-107.000
BB13132066	\$818.020
BB13132048	\$0.000
BB13132072	\$418.370
BB13132061	\$418.370

Top Purchase Orders – Last 10 Purchase Orders in descending order. Functionality that is currently being developed.

My Recent FAQs - OLD functionality that NO longer exists

Report Alert – Allows the user to access Reports that they have set alerts for in the action column of the report listings page.

PO&ST Alerts – Allows the user to see / access Purchase Orders and Store Transfers that have been set up as alerts based on templates.

Open Support Tickets Alert – OLD functionality that NO longer exists.



Fuse5 Alerts
Lost Sales [24]
Supersede Return [27]
Re-Order No / BuyOuts
Oversell
Unit Barcode [479]
Store Transfer Not Received [915]

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Supersede Returns Alerts – Under the Fuse5 Alerts section (see above). Allows you to access a report of returns of superseded parts.

Lost Sales Alerts - Under the Fuse5 Alerts section (see above). Allows you to access a report of lost sales.

Duplicate Barcode Alerts - Under the Fuse5 Alerts section (see above). Allows you to view a report of duplicate barcode numbers and resolve those.

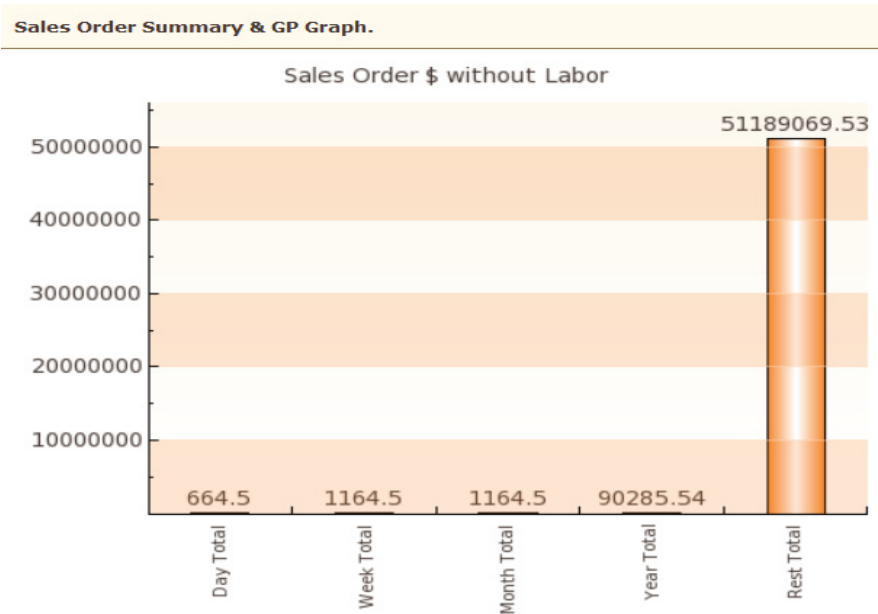
Re-Order YES/NO Alerts - Under the Fuse5 Alerts section (see above). Allows you to view a report of parts that have been a buy out, that have a re-order status of no.

Oversell Alert - Under the Fuse5 Alerts section (see above). Allows you to see a report of products that have been coded as oversell at the point of sale.

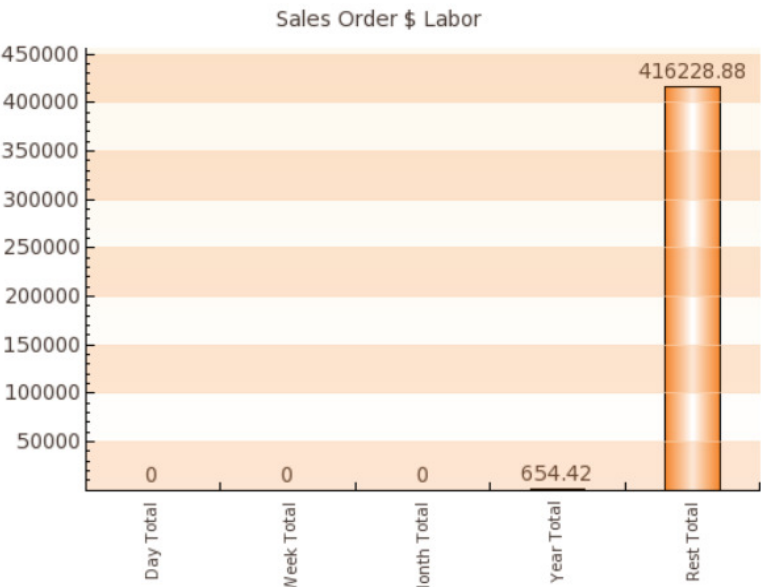
Fuse5 Updates Alert after login – When this alert is on you will get Fuse5 updates as a pop up on your screen the first time you log in each day. If there are no updates. You won't get the pop up. Fuse5 alerts are available to all users at the top right of every page within Fuse5.



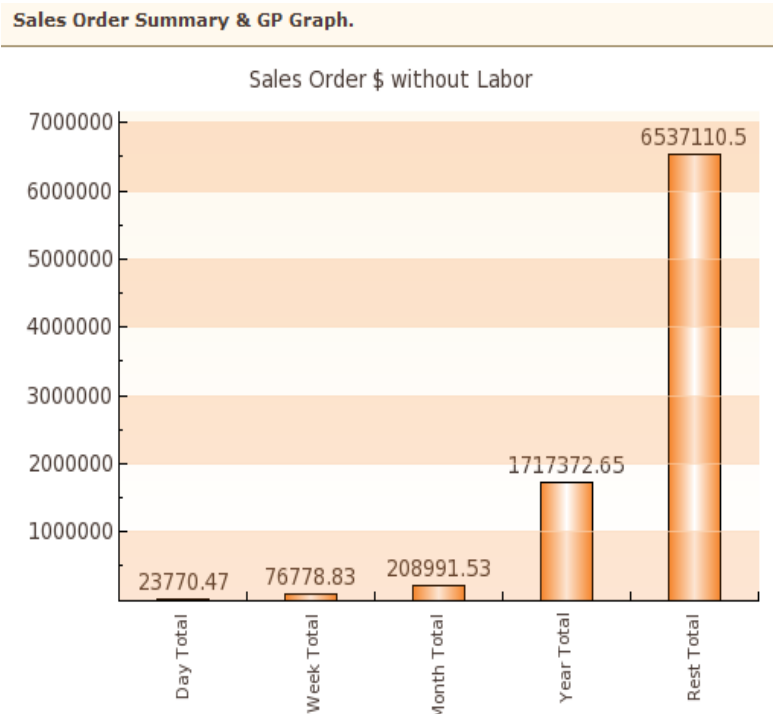
Today's Sales Order \$ Total By Location Graph without Labor -



Today's Sales Order \$ Total By Location Graph of Labor Only -

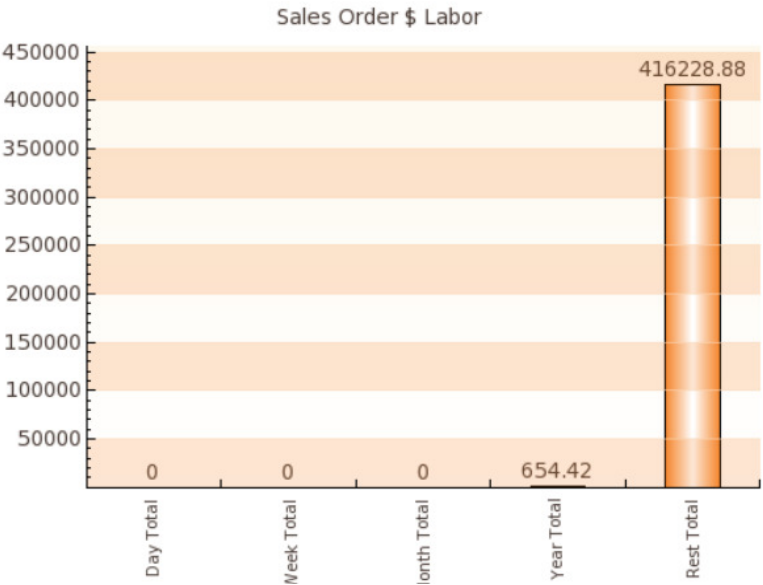


Sales Order Summary Graph without Labor -

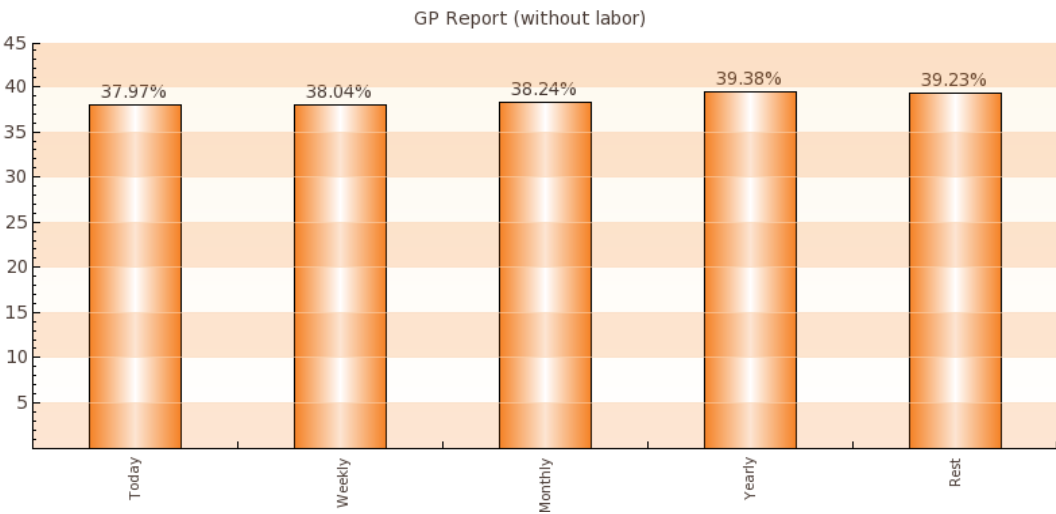


Sales Order Summary Graph of Labor only -

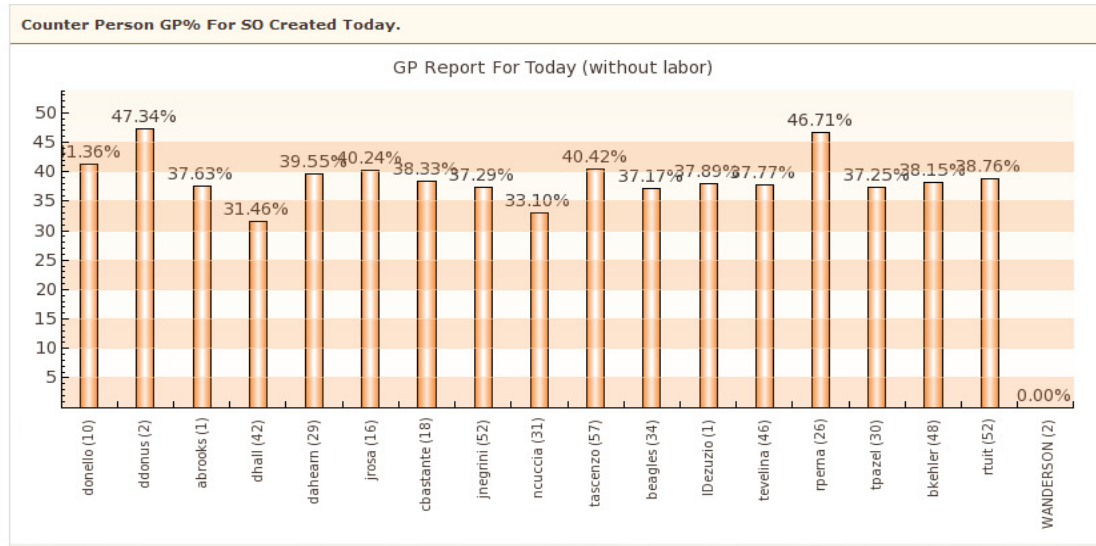
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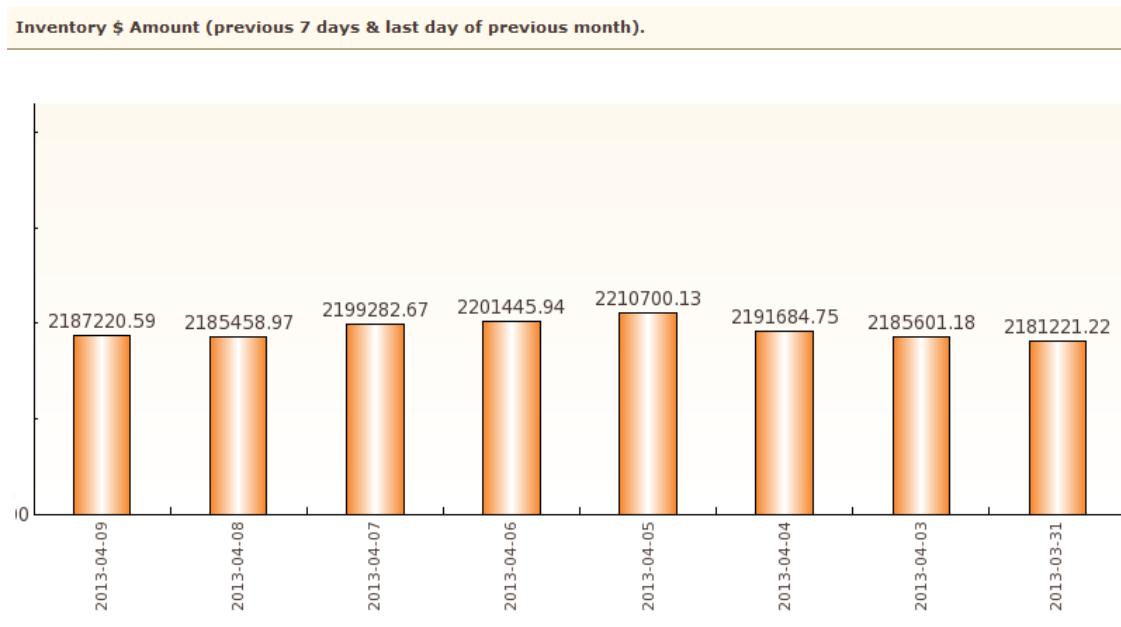
Sales Order GP Graph -



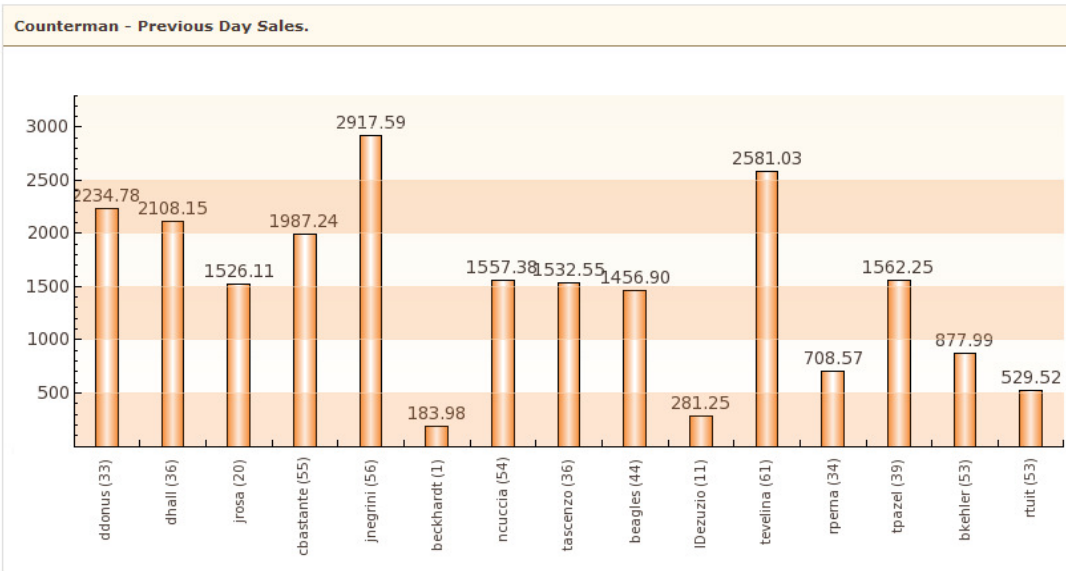
Counter Person GP% for SO Created Today Graph -



Inventory \$ Amount (previous 7 days & last day of previous month) Graph -



Counterman – Previous Day Sales Graph -



Top 10 Favorite Reports – in the report listing page, there is an icon with a star and plus button under the action column that allows you to save a report as favorite. This section shows the last 10 reports you have saved as favorites to allow for quick access from your homepage.



Buyout Received Alert - Users can be updated about the receipt of Buyout Purchase Orders in Fuse5; Dashboard Alerts & Email Notification. The user setting under 'Home Page Components' called 'Buyout Received Alert' allows this. When in

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edit mode in the user record you can turn this on as well as choose whether to 'Send Email Alert'. Emails will be sent to the email address they have set in 'Personal Email'.

After this is set up, users will find a new Dashboard Notification for 'Buyouts Received'. Users can even use this alert to go directly into the related SO or simply delete the alert. Additionally, if you open the alert pop-up in one of your Firefox tabs it will refresh every 15 minutes.

My Groups – future functionality

Additional Functionality from the User Screen

View Audit Trail – Allows you to see historical actions taken in Fuse5 by this user

Duplicate - Duplicate is typically used when an additional user is created with the same role and settings as additional employees are added

Edit - Edit will be used when a single user needs updated

Delete - Delete function if a user needs to be removed



Users – takes you to the Users listing page

Roles – takes you to the Roles listing page

User Login History – takes you to the User Login History page where you can select a user and view their login history

Payroll Report – takes you to the Payroll Report where you are able to pick a time period and see the hours worked for all employees

Time Card - takes you to the Time Card page where you can select a user and time period to see their payroll hours



