Custom Settings

CUSTOM SETTINGS - Available under PERSONAL & ADMIN / SETTINGS – select the Custom Settings icon under Company Locations, bottom center.

Sales Orders

Price off of GP% button - On means the GP% button is available at the point of sale. Off means it will not be available at the POS.

Default Repair Part # - Used to create invoice from the repair ticket.

POS (Point of Sale) GP% (Gross Profit) Based On - Can be based on Current Cost, Average Landed Cost, First In First Out, or Last In First Out. You will probably want to make this line up with how you are doing your overall company accounting for Gross Profit.

Vendor Name for Buyout SO (Sales Order)- You can set a default Vendor Name for a buy out sales order, or if the vendor is going to change regularly leave it blank and put in the vendor at the POS.

No Related SO (Sales Order) Authentication - Allows you to either show or hide the authentication pop up when related sales order is not selected for return transactions when creating a Sales Order. Initially would recommend you give everyone access as you may have multiple returns that are not from sales orders in fuse5. When OFF, users will get no notification that a related SO has NOT been chosen. When ON, any role pushed to the right will get no notification that a related SO has NOT been chosen. If turned ON, any role not pushed to the right will get a pop up at the point of sale requiring them to enter a user name and password for a user who's role has been pushed to the right.

Confirmation Pop Up next to No Related SO Authentication - If the CONFIRMATION POP UP box is ON, then all roles will get a pop up if they try to process a return with no related sales order. This pop up does NOT require a password override, it is simply a warning / reminder to the user.

Check Old Sales Line Items for related Sales Orders - This setting turns on the ability to search SLI imported from an old system when looking for related SO during a return transaction. When you turn it on, you also need to provide a date to indicate what date the imported SLI is older than. This should always be your Fuse5 go live date. Fuse5 automatically handles finding related SO in the newer SLI it creates, but it needs to know when to use an alternative search on your old systems data that was imported.

Example:
Say you go live on 1/1/2014. Normally you will import your older SLI from a couple years earlier

through 12/31/2013. If this SLI is broken out by account, and you are using the same account numbers in fuse5, then you can set this to ON, and put a date of 12/31/2013 as the date to begin searching backward for old related sales.

This setting will add an additional option in the Related SO drop down in the point of sale called 'Old Related SO'. When you click that you will get a popup list of matches to choose an old related sales order that was imported.

At some point in the future, when your old system data is no longer relevant, you may want to turn this feature off.

Please Contact Fuse5 support to put this setting ON or OFF or need any date change.

Account Search Data Display - When entering an account at the Point of Sale, if there is more than one possible result based on your selection criteria you will get a drop down showing all possible results. In addition to the Account Name and Number you can display up to three additional pieces of information. Choose the information from the left that you want to display and push it to the right.

Choose Account Searching Options - Search account by account exact search, account number, or account name when creating a sales order. Defaults to all options which can be left alone.

Returns & Credits on Sales Order Restriction - Are there any employees in your organization that you do NOT want processing returns at the Point of Sale? If ON, any role pushed to the right will NOT be able to do returns at the point of sale. They will not be allowed to select any of the return transaction at the point of sale. If they attempt to choose a return transaction, they will get a pop up telling them that they cannot proceed.

Combined Sales & Returns on Sales Order Restriction - When this option is turned on, roles that are added to this restriction will not be able to process a return transaction and a sale transaction in the same Sales Order. They will still be able to do returns and sales but they will not be able to do them in a single Sales Order. Additionally, this restriction will disable the 'Import as CSV' and 'Copy SO#' functions at the Point of Sale.

Default Current User as Counter Person - If this is ON the current user will default as the Counter Person at the Point of Sales. If it is OFF, you must choose a Counter Person every time you process a sales order.

Switch CP Automatically for pending SO/PO - Default Counter Person list based on default location of each user.

Lock Counter Person Down To Only Current User - If this option is selected then all SO transactions will have the 'Counter Person' locked down to the 'User' that is logged in. This also means that the three 'Counter Person' settings can not be changed unless this option is turned off.

Password Protect Counter Person Change / Selection at POS - If turned on and you change counter

people at the POS you are forced to enter your password for security purposes.

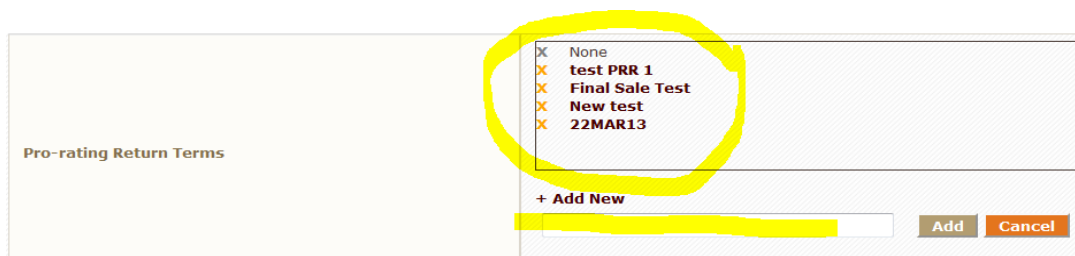**View SO (Sales Order)** - Enable/disable view SO DELETE and CHANGE OWNER button.

Un-used SO# (Sales Order) - When set to 'Void' Fuse5 will discard any SO# associated with a sales order that is not finalized or saved. When set to 'Reuse' Fuse5 will later recycle SO#'s that are not saved or finalized. Keep in mind that when this is set to 'Reuse' it is possible that an SO# could be used repeatedly until it is used for an sales order that is either finalized or saved.

Finalize SO when Charged - Finalize the sales order when the CHARGE payment button is clicked on the Sales Order.

Other Location Allow by Roles - Used to allow particular roles the ability to move from one location to another using the location at top right of every screen. If a role is selected, they can move from location to location. If not selected, the only location the role can log into is their default location.

Print Part Superseded info on Invoice – If on then fuse5 will print superseded comments on the sales invoice.

Pro-rating Return Terms - This will define if we you give a full refund to a customer when they return parts or some fees needs to be deducted from original selling price. Cores should be returned at same rate. No Prorate for cores. We can define section in settings area where customer can define their own pro rating terms.. We can allow then to add as many steps as they want. Like 0-30 days -1%, 30-60 days -2% etc or say anytime 10% or something like. They can set their own terms and then those terms will be displayed in account's "Prorated Returns" FIELD dropdown. By default it will be NONE for each customer so return at the selling price. You MUST create the return term rule in Custom Settings prior to attaching to an account record. Use the + Add New button to create a new rule.

Allow Role to Create Products From POS (Point of Sale) - Gives roles the ability to create parts (also allows them to do buy outs at the POS)

Edit Core Sell Price from POS (Point of Sale) - Allows role to edit core sell price at the POS.

Select M-fields to display in SO (Sales Order) - Allows you to choose which M-fields are displayed on the sales order when you push the orange M icon at the POS.

Lost Sales Reasons – This setting allows a user to create options for lost sales.

Who can add/edit/delete FILTERS? - Allows by user, the ability to adjust filters. (add/edit/or delete them)

Who can have Lost Sales Email? - On a weekly basis Fuse5 will pull a report of the lost sales and send an email to all roles selected in this setting. An email must be set up under the user for them to get it. The Lost Sales Log Report is also available on the home page dashboard.

Who can delete COD (Cash on Delivery)? - Designate which roles have the ability to delete a COD.

Print Store Transfer info on Invoice - If on then store transfer comment will be printed on the sales invoice.

Print Buy Out Info on Invoice - There is a custom setting available at.... (PERSONAL & ADMIN > SETTINGS > CUSTOM SETTINGS > "Print Buy Out Info on Invoice"). This allows you to choose if you want the Buy Out information, to include the PO number, to be displayed on the sales order invoice, pick ticket & packing slip, all of them, or none of them. This can be useful if you do not want to display buy out information on your printed sales order invoices. If on then buy out comment will be printed on the sales invoice.

Print SO (Sales Order) Comment On - Choose if you want sales order comments (from either the product record or a comment created at the Point of Sale) to show on either the invoice only, or the invoice and pick ticket.

Print Account Part Number on Invoice - There is a feature that allows you to put a different Line Code : Part Number than your own on a printed invoice for parts on specific accounts. Here is why you might use this... Say you have a very large account and they NEED to see the part number THEY understand on the Invoice when you sell it to them. If your product number is displayed, they will not know what it is. Under the account, below the details on the account details screen, there is a new spot to add special part numbers. You put in the Master part line code and part number, and the substituted line code and part number here. You can also bulk import/export them in the new Product Management->Products->Account Part Numbers screen.
Once you have done this and set the custom setting "Print Account Part Number on Invoice" to ON, the printed invoice will show the numbers that account wants to see. This does not effect what you see on the SO screen when creating the sales order. This only effects the printed copy. If there is not a special account part number found, it still prints out the normal part on the Invoice.

Allow Role to access Print Server module on POS (Point of Sale) – This setting determines which roles have access to the print server.

View "COD" (Cash On Delivery) button in SO (Sales Order) - Used to hide/show cash on delivery button at POS detail view and edit view.

Allow role to access Print Server unlock module - If turned on it allows you to choose which roles

will have access to the Print Server module. The print server is used to direct print jobs to the appropriate printers within your network.

SO (Sales Order) Price Over Ride - Selected line codes will NOT allow users to lower the sell price while creating a sales order.
Who can not override SO (Sales Order) Sell price - When OFF, all users are allowed to change the sell price. When turned ON you you can select which individual users are allowed to override the sell price at the Point of Sale.

Require receipt of inbound PO from SO (Sales Order) - When turned ON with the check mark, users at the point of sale will be prompted with a pop up when doing a sales order if an understocked item is coming in on a PO. When turned to OFF with no check, the user will not see this pop up at the Point of Sale.

Require receipt of inbound ST (Store Transfer) from SO (Sales Order)- When turned ON with the check mark, users at the point of sale will be prompted with a pop up when doing a sales order if an understocked item is coming in on a ST. When turned to OFF with no check, the user will not see this pop up at the Point of Sale.

View Inbound Purchase Orders for Your Distribution Center From the Sales Order - Do you want users in non distribution centers to see what products are coming into your distribution center on inbound purchase orders at the point of sale? Is so, change this setting to ON. If ON, then choose the roles that you want to see this information. This will appear in the form of a pop up at the point of sale if products are added to a sales order that your location does not have available. If you do not want users to see this information at the point of sale leave it set as OFF. There is no receiving capability associated with this setting.

Fuse5 Training Materials

Quantity Ordered is greater than Quantity in stock					✕
This product is an Inbound Store Transfer OR on Purchase Order.			<< Back to buyout options (TA < OQ)		

Product : moon roof - Part3 - TRN — **Location : Dubuque**

Ordered Qty : 1	Total Available : 0		QoH : 10

Reorder : Yes	Part Min : 100	Part Max : 15	Part Order Point : 10
Customer Back Order Qty : 0	Vendor Back Order Qty : 0		

Dubuque: Inbound ST — Apply this action for all: -- Do Not Receive --

TRN Date	TRN #	From	Qty on Order	Action
		No data found.		

Dubuque: PO Details — Apply this action for all: -- Do Not Receive --

PO Date	PO #	Order Qty	Qty Received	Qty Cancelled	Qty on Order	ETA Date	Action
04-Dec-2013	P1-338	8	0.00	0.00	8.00	05-Dec-2013	-- Do Not Receive --

Receive PO Now **Close**

Distribution Center Location(s) PO Details
(NOTE: It will not show details of Distribution Center location if it is current location)

PO Date	PO #	Location	Order Qty	Qty Received	Qty Cancelled	Qty on Order	ETA Date
			No data found.				

Print BIN/Zone/Shelf info on Sales Order - If on then system will print BIN/Zone/Shelf info on Sales Order if in product record

Print BIN/Zone/Shelf info on Purchase Order - If ON then the system will print BIN/Zone/Shelf info on Purchase Orders if in product record

Print BIN/Zone/Shelf info on Store Transfer - If ON then the system will print BIN/Zone/Shelf info on Store Transfer if in product record

Print Bin/Zone/Shelf info on Sales Order	☑ ON
	If ON then Bin/Zone/Shelf information will print on all sales orders
Print Bin/Zone/Shelf info on Purchase Order	☑ ON
	If ON then Bin/Zone/Shelf information will print on all purchase orders
Print Bin/Zone/Shelf info on Store Transfer	☑ ON
	If ON then Bin/Zone/Shelf information will print on all store transfers

Print Zonewise Pickticket - Warehouse Management functionality in Fuse5 has been set up to allow you to print pick tickets by Zone. You can enable this in the custom setting "Print Zonewise Pickticket" and then you'll need to set the printers in the printers settings (above location settings on the company details page) for each zone.

Pick Ticket Zone Source for Printing - If you are Printing Zonewise Pickticket you have the option of using the zones in Product records or WMS zones. If you are not using WMS you must choose Product Zones.

Child Account Warning from SO (Sales Order) - If turned on then the Child Account Warning will pop up at the point of sale

Merge duplicates products - If turned on duplicate products will be set to merge at the Point of Sale

Display OE# (original equipment) - If turned on then any product that has an Original Equipment Number in it's product record will display the OE# under the product name on the sales order.

Display MFG# (manufacturer) - If turned on then any product that has a MFG# in it's product record will display the MFG# on pick tickets created from sales invoices.

Print 0 qty (Quantity)shipped product on Pick Ticket -Turning this setting on will result in 'Pick Tickets' that include 0 'Qty Shipped' line items. Turning this setting off will result in 'Pick Tickets' that do not include those line items with a 0 'Qty Shipped'. FYI: An invoice with a backordered product would display as a 0 'Qty Shipped'

Change Shop Parts on SO (Sales Order) - gives users the ability to change shop parts on the sales order

Turn On/Off "Sell Anyways" in SO (Sales Order) - On/Off in the Out of Stock Options that pops up when trying to sell an out of stock product or pops up when you push the orange 5 at the end of any line in a sales order that is for an out of stock product.
Turn On/Off "Backorder" in SO (Sales Order) - On/Off in the Out of Stock Options that pops up when trying to sell an out of stock product or pops up when you push the orange 5 at the end of any line in a sales order that is for an out of stock product.

Turn On/Off "Lost Sales" in SO (Sales Order) - On/Off in the Out of Stock Options that pops up when trying to sell an out of stock product or pops up when you push the orange 5 at the end of any line in a sales order that is for an out of stock product.

* To turn On/Off Oversell, Buy Out, or Store Transfer, use HIDE SELECTED TRANSACTION CODE IN SO LINE ITEM below

Search OE# (Original Equipment) field along with product # - When this setting is turned on, and you have an OE# stored in your product record, if you enter the OE# in the product number field on the sales order, it will search for and find the part.

Search MFG# (Manufacturer) field along with product # - When this setting is turned on, and you have an MFG# stored in your product record, if you enter the MFG# in the product number field on the sales order, it will search for and find the part.

Allow Partial Payment with Charge - Determine if you want to show or hide the partial payment button on the sales order

Default "Allocate Inventory" when saving a pending ST from SO - This option allows the user to choose the default answer for "allocate inventory" when saving a pending ST from SO.

Hide Barcode column on SO (Sales Order) - Hide bar code column on SO if ON, selected roles will not be able to see barcode on SO.

Days to show pending ST (Store Transfer) and pending SO (Sales Order) alert for Qty (Quantity) allocated - Days to show pending ST and pending SO alert for Qty allocated (defaults at 7 days)

Show pending ST (Store Transfer) and pending SO (Sales Order) alert for Qty allocated - Choose which roles will receive a daily pop up showing pending Sales Order and pending Store Transfer information.

More than 7 days Pending SO where Qty is allocated for location Fayetteville. ⊠

No	Created On	SO #	Account Name	Counter Person	Total
1	2013-03-12 05:06:10	1-124677	THE SERVICE CENTER	admin	$891.460
2	2013-03-12 05:03:51	1-124676	THE SERVICE CENTER	admin	$1245.460
3	2013-03-08 06:51:00	1-124578	THE SERVICE CENTER	admin	$844.020
4	2013-03-08 04:48:50	1-124567	THE SERVICE CENTER	admin	$0.000
5	2013-03-08 04:43:05	1-124566	THE SERVICE CENTER	admin	$1743.280
6	2013-03-08 03:40:17	1-124564	THE SERVICE CENTER	admin	$0.000
7	2013-03-08 03:36:35	1-124562	THE SERVICE CENTER	admin	$0.000
8	2013-03-08 03:34:32	1-124561	THE SERVICE CENTER	admin	$0.000
9	2013-03-08 03:33:23	1-124560	THE SERVICE CENTER	admin	$0.000
10	2013-03-08 03:31:50	1-124559	THE SERVICE CENTER	admin	$0.000
11	2013-03-01 07:15:01	1-124443	ZEAGLER AUTO SERVICE, INC.	admin	$677.560
12	2013-02-21 08:03:43	1-124359	THE SERVICE CENTER	admin	$844.020
13	2013-02-21 07:14:31	1-124356	THE SERVICE CENTER	admin	$844.020
14	2013-02-11 04:04:58	1-124190	THE SERVICE CENTER	admin	$31.620
15	2013-02-11 04:04:27	1-124187	THE SERVICE CENTER	admin	$31.620
16	2013-02-11 03:48:55	1-124183	ALLEN'S AUTO BODY	admin	$10.000
17	2013-02-08 07:24:55	1-124145	THE SERVICE CENTER	admin	$31.620
18	2013-02-08 06:47:14	1-124076	THE SERVICE CENTER	admin	$31.620
19	2013-02-08 04:32:55	1-6003962	THE SERVICE CENTER	admin	$31.620
20	2013-02-08 04:01:01	1-6003949	THE SERVICE CENTER	admin	$31.620
21	2013-02-07 23:44:26	1-6003938	THE SERVICE CENTER	admin	$31.620
22	2013-02-07 23:37:47	1-6003937	THE SERVICE CENTER	admin	$31.620
23	2013-02-07 23:36:18	1-6003936	THE SERVICE CENTER	admin	$31.620
24	2013-02-07 08:28:13	1-6003934	THE SERVICE CENTER	admin	$31.620

Delete Pending Quote Sales Order After # Days - Automatically delete pending quote sales orders after a certain number of days if they are not finalized. Every Sunday night Fuse5 will automatically delete all pending quote Sales Orders (and return pending QTY to TA) that are older than # days. If the value is 0 or blank, it will do nothing. Note that when this setting is turned on, Pending Quotes will not be removed if they have any finalized Purchase Orders or finalized Store Transfers associated with them.

Delete Pending SO (Sales Order) after # days - Every Sunday night Fuse5 will automatically delete all pending SO (and return pending QTY to TA) that are older than # days. If the value is 0 or blank, it will do nothing.

Show sell price Qty (Quantity) on SO (Sales Order) - This turns ON/OFF the box that shows below sell price that allows you to sell "PART" of an hour of labor. If you are doing SHOP work you will probably want it on to sell partial hours of labor at the point of sale.

View "Deposit" Button In SO - designate which roles are allowed to view the deposit button when doing a sales order

View RR (Return Rate) in SO - designate which roles are allowed to see the account return rate on a sales order

View PRR (Product Return Rate) in SO - designate which roles are allowed to see the product return rate on a sales order

Create DS (Disqualified Sales) in SO - determine whom has the authority to use the Disqualified Sales button at the POS.

Use parent's tax status in parent / child – This setting allows you to set the parent tax status into the child account records.

Show RPS (Reverse Part Supersession) button on SO - Reverse Part Superseded - If it is set to OFF, nothing changes from what you are used to. If it is set to ON, there is an RPS button that will show up on the SO line item if it was superseded to by another part. In the scenario above, if you click it, it will ask "Want to do reverse part superseded?". If you say yes, it will switch to part A and give you the regular QoH zero options (oversell, buyout, etc..).

Use Default Shop Price - When this is set to "Yes", any time your SOs are created as "Shop", fuse5 will pull sell price from the "Default shop price field" in your products. When SOs are created as "Parts", fuse5 will use standard sell prices.

Show the credit limit of the customer next to their current balance - When this setting is turned on, users will be able to click the Account Balance at the Point of Sale to get a display of the previous billing cycles for this Account similar to what is displayed in the footer of Account Statements. Note that the Custom Setting 'Show Total Owed on SO (Sales Order)' must also be turned on in order for this to work.

Show Total Owed on SO (Sales Order) - This setting allows you to display or hide customer account balances in the POS when creating Sales Orders.
You can enable/disable this option for different Roles by selecting the roles from the box on the left that you wish to have access to the display and clicking the arrow button in the center to add them to the box on the right. You can remove access by reversing this procedure to delete them from the box on the right. Note: Those with Admin privileges will always see the account balance.
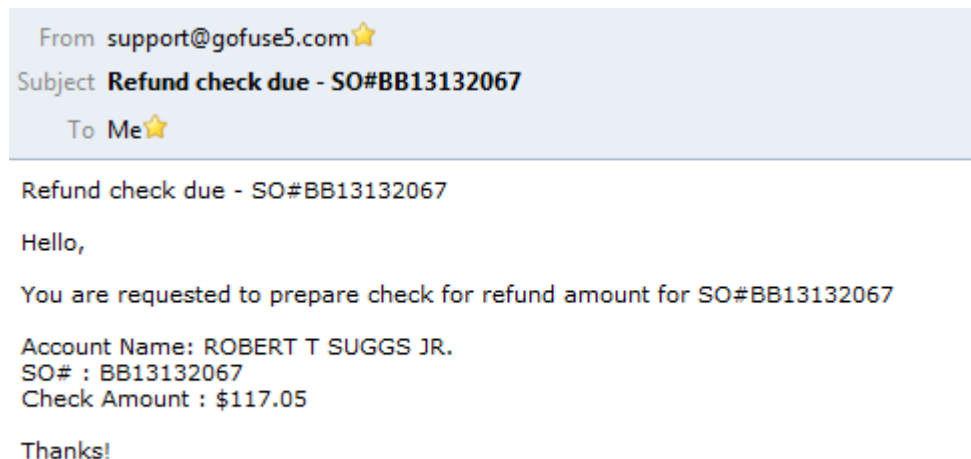
Show Markup & Discount on SO - Designate which users can do mark ups or discounts at the POS.

Show Ad on Packing Slip - When ON sales order advertisements will print on packing slips, when OFF they will not.

SO (Sales Order) credit override audio tone - Used to turn on/off the sales order credit override audio tone. This tone will be heard if an account is over their credit limit and the account is set to require a password override.

Search Product Name on SO (Sales Order) By? - At the Point Of Sale choose to search by product name using either 'begins with' or 'contains'. (*WARNING – searching by contains can take a lot longer based on the nature of the search within the database - WARNING*)

SO (Sales Order) Refunds due email address - If you allow refunds to be given by check, this is the email address for the person within your organization that should be notified to send a check to the account / customer. The email address entered will receive a notification every time a refund is approved via check.

From support@gofuse5.com
Subject **Refund check due - SO#BB13132067**
To Me

Refund check due - SO#BB13132067

Hello,

You are requested to prepare check for refund amount for SO#BB13132067

Account Name: ROBERT T SUGGS JR.
SO# : BB13132067
Check Amount : $117.05

Thanks!

Allow permission to Delete Finalized SO (Sales Order)- Allows you to set which roles have the ability to delete a finalized sales order. The delete button is available by pulling up a finalized sales order and looking towards the bottom of the screen. Deleting finalized sales orders must happen the same calendar day as the sales order is created or NOBODY can delete them.

Default lost sales to count towards SH - This is the setting to default lost sales to count towards SH. Selecting "Yes" will default lost sales to count towards SH. *WARNING If you toggle this setting it will cause all lost sales to revert to the most recent setting. The best way to change a particular lost sale is to use the Lost Sale Report from the homepage.

Lost Sale Factor - Fuse5 now has the ability to let you decide how much weight you want to put on

your Lost Sales. There is now a new custom setting called 'Lost Sale Factor' this can be found directly underneath custom setting 'Default Lost Sales to Count Towards SH'. This field is default set to '1' in order to retain previous functionality. You can change this value as you determine appropriate. Common factors are 1, 0.75, or 0.5. Whatever value you enter in this new field will auto fill into the Lost Sales Report. The Lost Sales Report now has a new column to work with this new feature. The 'Count Towards SH' column is now called 'Add to SH / SH Factor'. The 'Factor' field in each line will autopopulate with the value you have entered in the custom setting 'Lost Sale Factor'. Should you determine that you would like to change the Lost Sales Factor to something other than your default, then you can change this Lost Sales Factor to whatever value you choose from within the report. Once you change the factor, simply hit tab or click anywhere else to apply your changes. You will then be able to click on the SH graph and view your changes. Now the 'Lost Sales' field within the product record can result in a decimal, in order to keep this field populated with whole numbers Fuse5 will round up when a decimal value is the result.

Inventory Dollars based on - Setting for entry into LIFO Tracker.   When this option is set to "Last In First Out", Fuse5 will track "Current Cost" & "Core Cost" into LIFO Tracker Module. If QoH>0 then Fuse5 will track product "Current Cost" into LIFO Tracker Module, and If QoH>0 or Core QoH>0 then Fuse5 will track "Core Cost" into LIFO Tracker Module. The LIFO Tracker can be found under Data Tools - LIFO Tracker.

Accepts Gift Cards - when turned to ON you will have the ability to accept gift cards at the point of sale. When turned to OFF, you will not see the gift card functionality at the point of sale.

Update ALC (Average Landed Cost) in Buy Out Default - Do you want to see the UPDATE ALC on the Buyout Popup?

Default delivery option in Buyout Popup - What do you want to set as the default delivery method when doing a 'Buyout' at the POS?

Misc. SO Fee - Fuse5 now has the ability to charge miscellaneous fees on sales orders. You can name the fee whatever you like, an example would be something like 'Fuel Surcharge'. This fee will appear in the SO footer like a second tax field.

You can set the charge to be a flat value or a percentage of the sell total of the SO. First set up the custom setting called 'Misc. SO Fee'. If you wish to set a flat value for this fee, select 'Dollar' in the drop down and enter the dollar amount in the 'Value' field. If you would like to set this fee up so that it charges a percentage of the 'Sell Total' from the SO, select 'Percentage' in the drop down and type 10 for 10% or 3.5 for 3.5%.

Finally select accounts that you would like to charge the Misc fee to. Within the accounts information page you will find a field called 'Add misc SO Fee'. All accounts are defaulted to 'No', if you want to charge the fee to the account change this field to 'Yes'.

Who can over-ride sell price less than min GP% (Gross Profit) - If turned OFF then nobody can override this at the Point of Sale. When turned ON you can select which roles have the authority to override the minimum GP% and sell for less than the product record selection.

EoD (End of Day) by Cash 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.

Show Schedule button in POS (Point of Sale)- turns on or off the schedule button in POS. The schedule button allows the user to access the calendar and event functionality in Fuse5.

Display SO (Sales Order) specific partnote on POS (Point of Sale) – Turn on to display SO Specific Part notes at Point of Sale

Delivery methods to decide Sales Tax - Delivery methods to decide Sales Tax on sales order when account sales tax is based on TAC table. If the delivery method is under "Use Account Tax Fields", taxes on sales orders using these delivery methods will be based on either TAC or account based settings. If set under "Use Location Tax Fields" these delivery methods will ignore account based tax settings and defer to the location based settings.

Commissions tiers colors in POS - Allows the user to set up a color based scheme that will show at the point of sale allowing the counter person to know what range of GP% the product they are selling falls into without the need to push the GP% button. If turned OFF you will not see this functionality at the POS, if ON you will see it and the colors will be based on what the user sets up to align GP% with certain colors.

This is what the commission tier color looks like at the POS.

Use Rounding the Docket in SO (Sales Order) - YES/NO, do you want the rounding docket functionality available at the point of sale? This functionality is displayed as "Round This SO" at the point of sale and allows the user to put in a different grand total for the sales order. Doing so changes the sell price (on the current sales order only) for each individual product on the sales order.

Hide last sell price on SO (Sales Order) line item - Allows you to hide the sell price and only show the last date that a customer / account purchased a particular part from you. When OFF, both the sell price and date show up at the POS. When ON, only the date will show up.
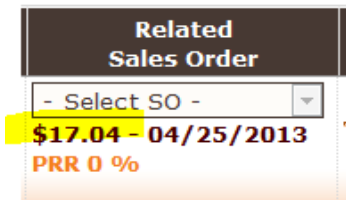
Hide Selected Transaction Codes in SO (Sales Order) Line Item - Select which transaction codes you do NOT want to show up when doing a sales order.

Popup a box from SO for account required fields, once you enter account name - We have added a custom setting allowing you to require certain account fields to be filled out prior to starting a sales order. We created this setting so that you can set Fuse5 prompt your counter people to update important account information. This setting is found in Personal & Admin > Settings > Custom Settings > Popup a box from SO for account required fields, once you enter account name.

This setting is defaulted to off, so there will be no change for you unless you turn this setting on. You can decide to make the following fields mandatory: Contact First Name, Contact Last Name, Phone, Email.
Once you have turned this setting on, any time an account that is missing data in any of these required fields is selected at Point of Sale, you will receive a popup box allowing you to update the required fields.
Please Note: If you turn this setting on, you will not be able to create a sales order until each required field has been updated.

Show Split payment button on SO - Turn ON or OFF the split payment button that shows up as a payment method at the Point of Sale.

Who can unlock a pending sales order - User can choose which roles will be allowed to unlock a pending sales order. If two users try to log into the same pending SO, the second one to log in will get a pop up warning them that someone else is in the SO and they will NOT be allowed access to it. If a user "locks" a pending SO, the roles chosen here have the ability to unlock the SO and gain access to it. The "Unlock SO" button is available at the Point of Sale for those roles that have this authority.
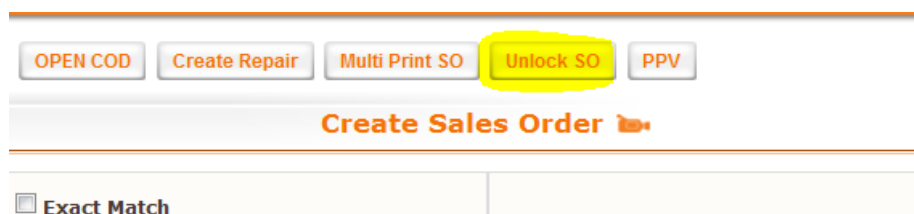
Show Schedule button in POS	☐ **OFF** Show Schedule button in POS
Delivery methods to decide Sales Tax	☐ **OFF** Delivery methods to decide Sales Tax on SO when Account sales tax is based on TAC Table
Commissions tiers colors in POS	☐ **OFF** Setting for Commissions tiers colors in POS
Use Rounding the Docket In SO	☐ **OFF** Use Rounding the Docket feature In SO
Hide last sell price on SO line item	☐ **OFF** Hide last sold sell price and show last sold date only

View All Location SO List - This option allows the users to view all locations sales orders on the sales order listings page. If turned on then you can select which roles are allowed to see all sales orders.

Print COD invoice for Net 1 charge customers - We have functionality to cover some atypical policies and procedures regarding COD's. Effectively, we have modified the functionality of accounts with terms of 'Net 1' so that they behave more like COD's from the customer's perspective.

Account Settings:
Terms = 'Net 1'
Finance Charge = 'No'
Acceptable Payment Methods = 'Charge, Cash, Check, Credit Card'

Custom Settings:
'Print COD invoice for Net 1 charge customers' = 'ON'

Counter Procedure:
A. Counterpeople should finalize sales orders of this type with a payment method of 'Charge'. Any invoices created for accounts with terms set to 'Net 1' and a payment method of 'Charge' will then print out with 'COD' at the top (as they were with the old COD invoices).
B. When payment is made by these customers on their accounts, they payments will be treated as an ROA. Normal procedures for receipt of an ROA payment should be followed.

Change SP-Change price / cost in product record when doing a buyout - When doing a "Buy Out" at the Point of Sale there may be situations in which pricing for a product is different than what you currently have stored in Fuse5. In the past you have been able to change the cost of the product on the buy out screen. This does not change the sell price on the sales order, nor does it change the current cost in the product record, you could update it and click the UPDATE ALC check box to update your

parts Average Landed Cost. Previously the only way to change the current cost, or any other price field in the product record, was to go to the product record using the "View the Product Information" icon under Product #. We have made it easier to change current cost and any of the Mfield costs in the product record when doing a Buy Out. When in the Buy Out pop up at the Point of Sale there is now a CHANGE SP button within the Buy Out Cost:$ box. By clicking on this button you are able to change the current cost or any of the Mfield costs permanently within the product record. You can also adjust the Avg Landed Cost, however this option within the CHANGE SELL PRICE pop up should only be used if you want to reset the Avg Landed Cost entirely. Whatever you choose in the CHANGE SELL PRICE pop up will become the new ALC. To adjust ALC proportional to this one time purchase price, use the UPDATE ALC check box on the QUANTITY ORDERED IS GREATER THAN QUANTITY IN STOCK pop up.

In order to make this functionality available you will need to go to PERSONAL & ADMIN > SETTINGS> CUSTOM SETTINGS > CHANGE SP-CHANGE PRICE / COST IN PRODUCT RECORD WHEN DOING A BUYOUT. When pushed the help icon will tell you to "Use the Change SP button to change M1-M10, CC, ALC or FIFO cost when doing a buyout. This will change the price in the product record, but will not change pricing for this SO. Changes to the current SO must be done manually.

Copy Billing Address To Shipping Address – Turn this ON if you want Fuse5 to copy the billing address to the shipping address fields when creating a sales order.

Push SO (Sales Order) to PPV (Pending Parts Verification) instead of finalizing - Pending Parts Verification (PPV) is an extra step added between creating a sales order and printing the invoice. The extra step is used to scan/verify quantity and parts picked before releasing the invoice. When a sales order is created with PPV on, a pick ticket will print (based on the account's default documentation preference), but the rest of the documents including the invoice and packing slip will not print at that time, and the sales order will then be listed in the 'PPV' page. You can access the PPV page through the white button at the top of the 'create Sales Order' page, or under the Sales Order Menu. Using a pick ticket or fuse5 scanner a user will pick the parts, then go to the PPV page, select the invoice and scan the parts to verify all parts were found and picked. This will then print the rest of the documents for this sales order including the invoice and the packing slip.

Allow role to access Part Verification (PPV) module on POS - If turned on it allows you to choose which roles will have access to the Pending Part Verification module at the Point of Sale. PPV is used to ensure parts are scanned out using a bar code scanner before they leave to the customer.

Edit Ship Qty while Verifying qty in PPV - When this setting is turned off, all users can edit 'Ship Qty' in PPV. When this setting is turn on, only roles added to the right column will have access to modify 'Ship Qty' in the PPV module.

Print Purchase Order Default - This changes the default printing behavior of PO's. When this setting is turned on you will have the option to automatically print normal PO's, buyout PO's or both. Please note that users can always manually print out PO's by clicking the 'Print' button from the PO details page.

Display Kit Button at POS - If turned on all roles selected will have access to the Kit button at the point of sale.

Enable GRT Tax - Do you want to charge Gross Receipts Tax at the Point of Sale? Set this field to Yes.
   Related Settings:
   Account field 'Charge Gross Receipts Tax'. This field defines whether or not this Account will get charged a Gross Receipts Tax.
   Product field 'Business Apply Gross Receipts Tax'. In order to charge a Gross Receipts Tax to a Product this field must be set to Yes. Setting this field to No will result in no Gross Receipts Tax being charged.

Show Copy To Clipboard button on SO - Do you want users at the point of sale to have the ability to "copy" the sales order data so they can "paste" it to a document or in a chat (such as Skype)? If so, turn this setting to ON. The button will be displayed at the Point of Sale directly below where you add parts and next to the catalog, disqualified sale, and core log buttons.

Display General SO Comments By Default - When turned on general SO comments will show by default the first time a web order is opened. (this is specific to channel adviser, the comments are populated based on a comment field in Channel Adviser).

Who can change payment method of Deposit / Gift Card - Do you want some roles within your organization to have the ability to change the payment method for a customer deposit or to change the payment method for a gift card that was sold? If so, turn this to ON and choose the roles that you want to grant this authority to. If granted this authority, the ability to change the payment method shows up if you click on the deposit or gift card when doing the End Of Day process.

On POS who will be redirected to SO List, instead of New SO page - When you finish a sales order at the Point of Sale in Fuse5 users are by default directed to a new sales order page. Do you have users that would prefer to be directed to the sales order listings page rather than a new sales order? If so, turn this setting ON and move the roles to the right that you want directed to the listings page and NOT a new sales order. Regardless of where directed, all users with appropriate permissions can still open up additional sales orders or go to the listings page.

Change Payment Method Time Limit with Exceptions - Fuse5 allows you to change the payment method of finalized sales orders (generally used if the wrong payment method is originally selected). If you have employees that you do NOT want to have this ability, then go to their USER setting called "Make Adjustments & Change SO Payment Method" and change it to NO. In regards to this setting....Do you want eligible users to have the ability to change the payment method regardless of whether or not the sale has been pushed to your financial software through the EOD process? If so, leave it OFF which allows users to change the payment method at any time with no restrictions. Do you want to eliminate the ability to change payment methods once the sales has been pushed to your financial software? If so, turn this setting ON which will make is so once the sales order has been pushed to your financial software, the change payment method will NO longer be available for that

sale. If you turn this ON, but have some roles that you would like to be exempt from the restriction simply push their role to the right side and they will retain the ability to change the payment method at any time.

Default Of of Stock Options in "Line Options" - Do you want to choose a Default Out of Stock Option at the Point of Sale for ALL users? If you turn this ON and select a Default Out of Stock Option, users will NOT need to select an Out of Stock Option at the Point of Sale, rather it will be turned on for ALL sales orders created. Users still have the ability to go into LINE OPTIONS at the Point of Sale and turn this off, but it will be defaulted as ON and the out of stock option chosen in this setting will be turned on for all sales orders. This can be useful if the majority of your sales orders start with a quote and you do not want to source parts until you are ready to finalize the sales order.

View "Save As Pending" button in SO - Designate which roles have the option to use during a sales order.

Quick Save Pending Sales Order - Do you want to see the pending pop up at the point of sale or do you want to make your default selections and have them automatically chosen every time selected users click on SAVE AS PENDING at the point of sale? If set to OFF, all roles will be asked to make selections about pending status, inventory allocation, pick tickets, etc. after clicking the SAVE AS PENDING button. If ON, all chosen roles will NOT see the pop up, rather the sale will go into pending status with the default selections made in the following custom settings.

Default Print Pick Ticket for Pending Sales Orders - When creating pending sales orders, do you want to print a pick ticket. If yes, turn this YES. If no, turn this NO. User can select other option at the point of sale.

Default 'allocate inventory' when saving a pending SO (Sales Order) - Default answer for "allocate inventory" when saving a pending SO. This setting determines what ability the user has to allocate inventory when doing Pending Sales Orders,
Default Yes = defaults to yes but can be changed at the point of sale,
Default No = defaults to no but can be changed at the point of sale,
Always Yes = defaults to yes and CANNOT be changed at the point of sale,
Always No = defaults to no and CANNOT be changed at the point of sale.

Change Web Order Default Counter Person - Turning this setting ON will remind users to change the Default Counter Person when saving or finalizing Web Orders. They will receive the following message if they try to save or finalize a web order without changing the default counter person.

You are about to finalize/save a weborder set to the default counter person. Press Ok to proceed, or cancel to change the counter person before you finalize/save.You are about to finalize/save a weborder set to the default counter person. Press Ok to proceed, or cancel to change the counter person before you finalize/save

Allow Buy Outs to Backorder Log - Turn this ON if you want to have the backorder button in the

Buyout pop up.

View "Quote It!" button in SO (Sales Order) - Designate which roles have the option to use during a sales order.

Quick Save Quote Sales Order - Do you want to see the quote it pop up at the point of sale or do you want to make your default selections and have them automatically chosen every time selected users click on QUOTE IT at the point of sale? If set to OFF, all roles will be asked to make selections about pending status, inventory allocation, pick tickets, etc. after clicking the QUOTE IT button. If ON, all chosen roles will NOT see the pop up, rather the sale will go into pending status as a quote with the default selections made in the following custom settings.

Default 'allocate inventory' when saving a Quote - Default answer for "allocate inventory" when saving a Quote. This setting determines what ability the user has to allocate inventory when doing Quote,
Default Yes = defaults to yes but can be changed at the point of sale,
Default No = defaults to no but can be changed at the point of sale,
Always Yes = defaults to yes and CANNOT be changed at the point of sale,
Always No = defaults to no and CANNOT be changed at the point of sale.

Print Quote Default - When this setting is set to 'ON' the default option for 'Print Quotes' will be set to 'Yes' when you are creating Quote SO's.
Email Quote Default - When this setting is set to 'YES' the default option for 'Email Quote' will be set to 'YES' when you are creating Quote SO's.

Default Print Pick Ticket for Quoted Sales Orders - When creating a quote, do you want to print a pick ticket. If yes, turn this YES. If no, turn this NO. User can select other option at the point of sale.

Default Modified Tax during Save as Pending/Quote it - When this setting is turned on Fuse5 will be defaulted to save any tax status changes made to particular SLI's on an SO. Fuse5 will rerun tax logic each time a saved SO is reopened, by using this setting you will be able to retain any changes that were made to the tax status of individual products on SO's. This setting only manages the default yes or now when doing a pending SO or Quote. Regardless of the setting you choose, the user can choose either YES or NO when doing an actual Sales Order.

Prompt "Create New Account" on POS While Searching For Account - Do you want your users to get a pop up at the point of sale asking them to create an account if they attempt to enter an account name that doesn't exist? If yes, turn this setting ON. If no, leave this setting OFF.

Display Address Information in the Sales Order when finalizing Web Orders - Do you want to display the address on the Sales Order page when finalizing new web orders? If set to YES, the address information will display when finalizing new web orders at Point of Sale. This is useful if you usually get web orders from accounts that you are not familiar with. If set to NO, the address information will not open when finalizing new web orders in the Sales Order Screen. This is useful if you usually receive web orders from accounts that you already are familiar with.

Require Numbers on Refund Checks to the "Sales Order" section - When processing returns at the Point of Sale with check as the payment method, do you immediately write the customer a check? If so, would you like to record the check number as part of the transaction at the Point of Sale? Turn this setting ON to require a check number when doing returns and selecting check as the payment method. Leave this OFF if you write the check after the fact and the person doing the return will not have access to the check number.

Alternate & Related Part Pop Up at Point of Sale - Do you sell alternate or related parts? If so, when you add a part to a sales order that has an alternate or related part the counter person will have the ability to click a button labeled AR under the action column on the sales order. If you don't want the counter person to have to click the button and would prefer to have an automatic pop up prompt the user to sell alternate or related parts, pick the appropriate option from this custom setting.

Show Signature Capture Button on SO (Sales Order) - Only set this to yes if you have a Topaz signature capture pad connected to your PCs to capture signatures. When you set this to yes, you will get an additional button at the bottom of the SO creation screen to capture a signature if you choose to do so (it is optional).
You also get a button at the top of the finalized SO screen to capture a signature at any time you wish. You will have full control of if/when you capture signatures by simply clicking the button to activate the signature capture device.
In order for the Topaz device to work you need to download the driver software from :
http://www.topazsystems.com/Software/download/SigPlusWeb.htm
onto the PCs that have the device attached. If this software is not installed and working properly with the device, you will not see the signature capture button

Technician Users By Role - When creating Shop style Sales Orders, you will see a listing of technicians based on the roles you select here in combination with the user's Default location (setting found on the user page).

Allow Roles to Save Part Notes or Part Comments to the Product Record at the Point of Sale - Do you want any roles to have the ability to edit part notes and comments at the point of sale, but only be able to save them for that sales order and NOT to the permanent part record? If YES, turn this setting to ON and choose the roles that you want to have the authority to save part comments and notes to a part record. Those not chosen can make changes to part comments and notes for an individual sales order, but not to the product record. If NO, leave the setting turned OFF. When OFF, all users can make changes to part notes and comments at the Point of Sale and save them to either the sales order or the product record.

Which roles can not see CP (Counter Person) Location on Sales Order – If turned ON you can choose which roles will not see the CP Location field on a sales or service order.

Which roles can not see Line Option Button on Sales Order - If turned ON you can choose which roles will not see the Line Options on a sales or service order.

Who Can Consolidate SO - Turning on this option will allow users access to 'Consolidate SO' at the Point of Sale after an account with pending Sales Orders is selected. Roles added from the left to the right will have access to 'Consolidate SO'.

Ignore Credit Limits on Web Orders - This setting will result in customers being able to place orders in WHI/Nexpart/Turbopart regardless as to whether they are over their credit limit or even have no credit at all. This setting will have no affect on orders after they are pushed to Fuse5, you will still manage credit limits and payment methods normally in Fuse5.

Turn on Stock Order Functionality -Turn on Stock Order Functionality

Display Reorder Status at the Point of Sale - Turn this option On to display the Reorder Status of a Product at the Point of Sale. This will be a display only icon, users will not be able to actually edit Reorder Status with this icon.

Custom POS Field 1/ Custom POS Field 2 - Do you want to create customized fields for use at the Point of Sale? If so, turn this option on. Once this setting is turned on, you may edit the name of the Custom POS Field. After you have created a name for this Custom POS Field, you may add options by clicking the Add New button. The first option on the list will always be the default option, you may drag and drop the options into any order you choose.

Once this setting has been turned on and customized, you will see this field displayed at the Point of Sale. On a Finalized Sales Order you will find the details of the selected Custom POS Fields in the Sales Order Details page. You can also create custom filters on the Sales Order Listings page that include these customized fields.

Example:

You have a desire to track the car colors for some reason.

1. Turn on Custom POS Field 1.
2. Add 'Car Color' to the Name field.
3. Click + Add New, type in 'Red', then click 'Add'.
4. Click + Add New, type in 'Blue', then click 'Add'.
5. Now go to the Point of Sale, you will find a new field in the Sales Order header labeled 'Car Color' with 'Red' & 'Blue' as selectable options

Allow Alternate Pick Ticket Sort Order Option - Do you want the option to use alternate Pick Ticket sort options when returning to a Pending Sales Order? If so turn this setting on.

When returning to a previously saved Sales Order you will see a drop-down next to the Print PickTicket option with a list of the alternate sort orders for Product Sorting on printed Pick Tickets.

Allow Tax on FRT for Shipping - Do you want to charge tax on FRT (freight) line items at the Point

of Sale? If so, turn this option on.

Note: When this option is turned on, FRT line items will follow the normal tax rules based on Account, Location & Product settings.

Protect Order Points with Store Transfers from Point of Sale - Do you want to protect Order Points and prevent users from being able to do Store Transfers on Products unless their is stock available in excess of those Order Points from the Point of Sale? If so, turn this setting on and select the Order Points you wish to protect at the Point of Sale.

Note: The Custom Setting 'Ignore FROM TA during ST' will prevent this setting from working as expected.

Show Shortage Alert - Show Shortage Alert after login. It will show SO# with products that are short in warehouse while they picked by scanner

Use Once A Day Discount not Web Discount - Do you want to allow the Once A Day Discount at the Point of Sale for Web Orders instead of using the Web Discount % Account field?

When this setting is turned on the Web Discount % will be disabled and it will be replaced by the Once A Day Discount

Hide QuickBooks (QB) Profile at Point of Sale - When using multiple company QuickBooks files (either based on location or account) all sales orders will default to the appropriate QuickBooks profile. If you want to allow users to push sales order data to a different profile than it's default (either based on location or account) push their role to the right.

Permit Access to Out of Stock (OoS) Options for Available Products - Do you want to allow access to the Out of Stock options when Products are already available, based on the Role of the user? Turn this setting on and add Roles that have this permission.

Restrict Access to Buyout in Out of Stock (OoS) Options - Would you like to prevent some Users from accessing Buyouts from the Out of Stock Options at the Point of Sale? Turn this setting on and add the restricted roles to the right.

Prevent Users From Deleting Products From Pending COD With Exceptions - When this setting is turned On, users will not have the ability to delete Products from a Pending COD unless they have specifically been granted a Role based permission by adding their Role to the list on the right.

Default Order Quantity at Point of Sale - Choose to have your order quantity at the Point of Sale default to either 0 or 1. KITS and Labor will always default to 1 regardless of your choice with this setting.

Limit Users Product Creating Abilities at POS to Defaults - When inside Catalog, the user can create a part based on Catalog Line code and part number. From POS, user can create a part, with

default location line code, and user can type part#. The default location line codes are set up in the Company Details > Edit a Location > Other tab > Default Linecode.

Printing

INVOICE:
"Part Invoice" Fields: Uncheck to not display – You can choose fields to NOT display on your printed invoices.

"Shop Invoice" Fields: Uncheck to not display -You can choose fields to NOT display on your printed invoices.

PURCHASE ORDER:
Field to print in "Description" label of Purchase Order invoice – You can choose to display either the product name or product description in the description field on printed purchase orders.

PICK TICKET:
Display SLI# (Sales Line Item) on Sales Order Pick Ticket – If YES, then the line item on the sales order invoice will be displayed on the sales order pick tickets.

Don't Print Pick Tickets for SO's (Sales Orders) that only contain return SLI's (Sales Line Items) – Do you want to print pick tickets for Sales Orders that only contain Return Sales Line Items? If you do not want to print pick tickets for sales orders that only contain return sales line items, then turn this setting ON. When this setting is OFF, Fuse5 will print pick tickets for all sales orders based on account settings.

Replace Printed Pick Tickets with Printed Sales Order - Do you want to print copies of the Sales Order Invoice to a second printer? Turn this setting on to do so but keep in mind that this will replace the printed Pick Ticket document with copies of the printed Sales Order Invoice. This 2nd Sales Order will print to the Pick Ticket printer as defined in Print by Location settings.

QUOTES
Use Estimate on Shop & Service Order Quotes - Do you want to replace the word **Quote** with **Estimate** on printed Service Order and Shop Sales Order Quotes? If so turn this setting on.

PRINTER
Delivery Method Printing Exceptions - Do you want to send all Sales Order related documents (Sales Order invoice, Pick Ticket & Packing Slip) to a different printer than the normal Print Server printer for specific Delivery Methods?
Turn this setting on then select the Delivery Methods that you wish to be included in this Print Server exception. After you have turned this setting on you will find a new module in the Print by Locations interface under Company Details. This new printer module will be called 'Delivery Method Exceptions'. Just add the Printer name in this module the same as any other Printer module.

LABEL
Print Label Size Configuration – used to configure your labels for printing

Service Order

Set "Service Orders" Page as Default by Role - Do you have employees that should always be directed to the Service Orders interface when logging in to Fuse5? If so, turn this setting ON and choose the roles that should be directed to the Service Orders listings page by moving their role to the right.

Primary Service Request - Do you have standard jobs that you do with your service department? If so you can use the + Add New button to create service requests and assign amount of time those jobs are expected to take.

Use Grouping Lineitems on Sales Order – If ON then lineitem's Group/Category feature / section will display to manage add/edit/delete/sort

Use Recommended Lineitems on Sales Order – currently in development

Who can add new "Primary Service Requested" in the dropdown while creating an appointment – currently in development

Service Appointment Priority - Use this setting to create the priorities that you want available when setting up service requests within Fuse5.

Security Settings

Login from Any IP (Internet Protocol) - Fuse5 can be configured to allow only access from certain IPs based on user and role. There are 3 settings that control how it works.

First, in **Company Details -> Location -> Allow IPs** you will put a list of IP addresses that are allowed to that location in fuse5.

Second, in **Users settings -> Default Location** there is an additional option (besides locations) called "Based on IP".

Third, there is a **Custom Settings-> Use IP Security settings** to turn it ON/OFF and grant exceptions.

If "Use IP Security" is set to OFF, the user IP address is ignored. If it is set to ON, you can then set up roles that are not subject to this security (admin users never are). For those roles not excepted from the rule you will get the following. If user A has setting "Based on IP", when they log in, Fuse5 will check

their IP and log them into the first location that has a match in it's "Allowed IPs" list. You can use this to limit/control where people log into from different locations. If user B is set to default location B, then when user B logs in, their IP is checked against location B "Allow IPs". If there is not a match, they cannot log in.

The process to configure this option is to first do the location "Allow IPs", then the user Default Location settings, and finally turn it on in Custom Settings. You can do any order you want, but you probably do not want to turn it on until the rest is set up, or you could end up locking everyone out.

Account

Default account number sort - This sets the sorting methodology on the 'Accounts' main page. Position sorts alphabetically by account name with numbers showing up before letters. Numerical sorts by account number with the lowest number first.

When creating a new account set the default location as user current location - When on the default location for a new account will automatically populate to match the users default location. When off, no default location automatically populates and you must add it to the account record.

ROA / ADJ Auto Print ROA & Email ROA Default Setting – When ON: ROAs and ADJ will be set to print and email when saved. User can deselect at the point of saving or turn the default OFF in Custom Settings.

Set Account Default Template - Account Default Templates set the default values for many account fields, which are then copied and set when a new account is created. You can have one account template for all locations, or you can have different default accounts for each location. You can set the account default template using the brown button placed top-right when you're viewing an account's detail page.

Hide SAVE & APPLY TO SO and SAVE & APPLY TO OLDEST INVOICES - Do you have certain roles that will be creating Receipts On Account (ROAs), but you do NOT want them applying payments to sales orders? If so, choose the roles from the left and push them to the right to remove their ability to apply payments to specific sales orders when doing ROAs. This is useful if you have store managers or other roles that receive payments, but an A/R staff member that will apply the payments to specific sales orders for open items accounting.

Display Transaction Details on ROA (Received On Account) Receipt - This setting only applies to 'Open Items' accounts when ROA's are specifically applied against transactions.
When the associated account is set to 'Open Items' and the ROA has been applied against specific transactions, the transaction details will display on the printed ROA receipt.

Use Parent's Bill To Info - Setting this option to 'ON' will result in printed Sales Orders displaying the 'Parent' account's 'Bill To' information.
Setting this option to 'OFF' will use the 'Bill To' address information from the current account. This

setting has no effect on parent/child account statements.

Default setting for copy Bill Or Ship Address During Account Creation - When this setting is turned on either the Billing Address fields will get copied over to the Shipping address fields or the Shipping Address fields will get copied over to the Billing Address depending on which selection you make. This affects the creation of individual accounts or importing new accounts.

Store Transfer

Lock Allocate Qty (Quantity) for ST (Store Transfer)- This setting affects the Allocate Inventory capability when attempting to initiate a ST from the "Quantity Ordered is greater than Quantity in Stock" option at the Point of Sale. When turned ON, Fuse5 will automatically allocate inventory if you choose NO to auto receive the ST and Fuse5 will NOT allocate inventory if you choose YES to auto receive the ST. If you turn this OFF (by un-checking the box next to ON), Fuse5 will allow the user to choose NO to auto receive ST and NO to allocate inventory."

Allocate Qty (Quantity) when creating a Pending Store Transfer - Allows you to turn ON and ALLOCATE or turn OFF and NOT ALLOCATE when creating a pending store transfer from an alert.

Store transfer product # sort options - This is one type of sorting option in Finalized ST. It will display two type of options :
"Part # Special" which will work like current ST line item listing,
"Part # Standard" will load ST line item like physical inventory report.

Delete Pending ST after # days - Every Sunday night Fuse5 will automatically delete all pending ST (and return pending QTY to TA) that are older than # days. If the value is 0 or blank, it will do nothing.

Print Part Notes on ST pick ticket - Assuming there are part notes in the product record, turn this ON to print them on the store transfer pick ticket. Turn it off to avoid printing these notes.

Print Store Transfer When Saving as Pending – When you save a store transfer as pending you will get a pop up that asks if you want to print a pick ticket or not. When this setting is ON the selection will default to YES, print a pick ticket. When OFF, the setting will default to NO, don't print a pick ticket. You can change your mind at the point of saving a ST as pending, this setting controls the default YES or NO. (choosing 'Create Pending ST' or 'Append to Pending ST' will not result in a printed ST until the PO is finalized.)

Show all locations last 12 months SH in PO line item - Select YES to see sales history for each of your locations on the product line when creating a Store Transfer. Warning, selecting YES requires

additional data to pull and may cause your ST to require additional time to populate when adding product.

Ignore FROM TA during ST - Disregard the FROM location's Total Available while creating store transfers. If the TA = 0 or <0, this will take the Qty on hand negative.

Print Status On Store Transfer Pick Ticket - This setting will print the status of the store transfer (Pending, Finalized, ST Cancelled) on the Pick Ticket.

Allow Per Car Quantity Rounding in Store Transfer - When this option is turned on, Per Car Quantity will become available as a transfer increment. Note that usually, Per Car Quantity is a stocking increment, not a purchase increment. With Store Transfers, it is being treated as a transfer increment. This is being done because purchase increments can easily conflict with stocking increments, especially when protecting quantities. It is suggested that the best way to manage inventory with Per Car Quantity would be to round up your Order Points to the Per Car Quantity.

Note: Per Car Quantity should generally be managed by modifying your Order Points (to be a multiple of the Per Car Quantity). Per Car Quantity is a target stocking increment. All other increments are purchase increments. Using conflicting purchase increments and stocking increments can create confusion.

Push Pending Store Transfers to the AWAITING STORE TRANSFERS module - By default (i.e OFF) all Finalized and ST Partially received store transfers will show up in the "Outbound And Inbound Store Transfers" module (DELIVERIES > AWAITING STORE TRANSFERS).
If you would like to push pending store transfers to this module "Outbound Store Transfers" turn this setting ON.

Restrict Store Transfer Creation to Default Location - Do you want to restrict some users to only being able to create Store Transfers To or From their Default Location?
If so, turn this setting on and add the Roles you would like restricted to the right.

Restrict Store Transfer Finalize to Default Location - Do you want to restrict User's ability to Finalize a Store Transfer to only when the Store Transfer From Location is the same as the User's Default Location? If so turn this setting on. (Users will still be able to Save as Pending.

Roles added and pushed to the right will be the EXCEPTION to this rule, User's with the associated Roles will be able to Finalize any Store Transfer To or From any Location)

Hide Cancel in Store Transfers - Do you want to prevent some Users from being able to cancel from Store Transfers? If so, turn this setting on and add the Roles you wish to be restricted to the right.

Non-Stocking Alternate Part Ordering - When created Store Transfers and using 'Alternate Part Ordering', Fuse5 will transfer extra units of Products referenced in the Product field 'Alternate Part #' if the primary Product is out of stock.

When this option is turned on, Fuse5 will only consider Products that have a 0 in the O2X value associated with the 'ST Type' of the Store Transfer you are creating. When this option is turned off, Fuse5 will transfer extra units of any Alternate Part # (normally stocking or not) when you are out of Stock on needed Products.

This option would typically only be used if you experience regular and extended shipping delays from your Vendors and have enough warehouse space to stock normally non-stocking Products as a backup in case of those delays.

Require Password for Store Transfer Activity - Do you want users to have to enter their user name and password when saving a store transfer in pending or finalized status? If so turn this setting ON.

Purchase Order

Append parts to finalized PO from PO Detail Page -Custom Setting 'Append parts to finalized POs from PO detail page'. After turning this setting on and adding User Roles to this permission a new button labeled 'Append Parts to PO' will show up on the Purchase Order detail page, just click the button and add the Products.

Delete Pending PO after # days - Every Sunday night Fuse5 will automatically delete all pending PO (and return pending QTY to TA) that are older than # days. If the value is 0 or blank, it will do nothing.

Show all locations last 12 months SH in PO line item - Select YES to see sales history for each of your locations on the product line when creating a Purchase Order. Warning, selecting YES requires additional data to pull and may cause your PO to require additional time to populate when adding product.

Allocate Inventory: Overstock Pending ST from PO - Default setting is "Yes". This setting affects the way Fuse5 handles your inventory when utilizing Store Transfers during the Purchase Order process. If you create an "Order to X" type of Purchase Order, and you do NOT have the "Ignore Overstock Locations" box checked, Fuse5 will check for overstock at other locations before it orders new products via Purchase Order. Based on the overstock that the system finds, you have the option to create an Overstock Store Transfer. You do this by hitting the "Create Overstock ST" button next to the "Get Product" button. You can finalize the ST at that time, OR you can save the ST as "Pending". Finalized Store Transfers allocate inventory as part of the finalization process, but for PENDING Store transfers you can handle it two different ways. Having this option set to "Yes" dictates that the created PENDING Store Transfer will allocate inventory during this process. This will cause a reduction of "Total Available" at the overstock location and add this amount to the "Quantity on Order" at the receiving location. If you want to continue to count overstock inventory as available at the overstock location, even though it is slated to be included in an upcoming Store Transfer, change this setting to "No". Unless you have a very specific reason to handle inventory this way, you should leave this option set to "Yes".

Print PO Part Notes on Purchase Order - Do you want to have PO Part notes printed on the your Purchase Orders? When this setting is turned ON, PO Part notes (from the product record or added

when creating a PO) will print on PO's. When this setting is OFF, PO Part notes will not print on PO's.

Show Freight and Duty on PO (Purchase Order) for distribute - Do you distribute freight and duty accounts payable to a vendor other than the one that you are ordering parts from? If so, turn this ON to allow you to push bills to the appropriate vendor.

Delayed Order Quantity on Order – Allows the user to create a delayed order quantity for an entire Purchase Order or individual parts within a purchase order. If a delayed order quantity is selected it will show up in the product record in the field for "Delayed Quantity on Order". This value reflects the number of units of this product that have a Delayed Quantity on Order. For additional details about the Purchase Orders, click associated value for this field.
If you need to change the date when you want the Delayed Quantity on Order to expire, click the associated value for this field. If you need to update all of the products in the Purchase Order, click on the Purchase Order link in the Delayed Quantity on Order pop-up. From this new Purchase Order detail page users may modify the dates on individual PO line items or modify all of the products on the Purchase Order under the Purchase Order Information header.

It is not possible to retroactively delay Quantity on Order after a Purchase Order has been created. You must use the 'Delayed Quantity on Order' flag during the creation of the Purchase order.

Note: It is likely advisable to expire the Delayed Quantity on Order some time in advance of the expected receipt date of the Purchase Order depending on how sure you are of the date of receipt and how you want the Quantity on Order to affect Store Transfers and other Purchase Orders when that date gets closer.

Allow User to Edit Purchase Order Numbers - Custom Setting 'All User to Edit Purchase Order Numbers' - After turning on the Custom Setting, click 'Order Info' in the Create Purchase Order interface. You can edit the PO Number to be whatever you want. Notes: This only works on non-finalized Purchase Orders. PO Number only accepts alphanumeric characters, dashes '-' & underscores '_'. Each PO Number must be unique within your system.
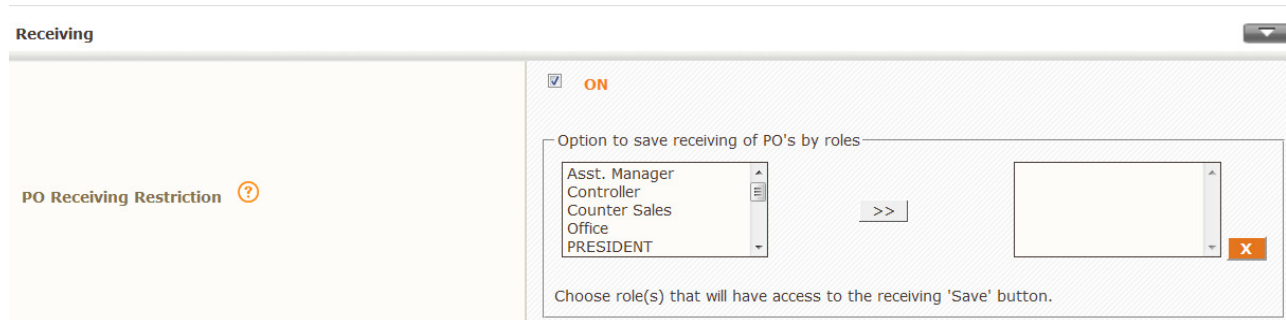
Warehouse exempt from ignore overstock - Do you want to exempt your warehouse from the **Ignore Overstock Locations** option while in Create Purchase Order? If so, turn this option on.

Display All Locations Average Daily Demand in Simple Forecast - Do you want to display the Average Daily Demand for all Locations in the Create Forecast Simple Purchase Order interface? If so, turn this setting on. **Note: If you turn this setting off, the current location's Average Daily Demand will display regardless as to how many locations are being ordered for.**

Default PO Listing Page to Location – Specific - Do you want to limit the Purchase Order Listings page to display Purchase Orders for the current location? If so turn this setting on.
Note that users can toggle this on and off on the PO Listings page with the 'Show PO for All Locations' check box on the page.

Receiving

PO (Purchase Order) Receiving Restriction - This setting allows you to restrict which user's roles will have access to the 'Save' button in the 'Receive by PO' & the 'Receive by Product' interface. If you turn this option on you will be prompted to select which roles will have the option to save receipts of PO's. This will not affect the ability to automatically receive a buyout PO.

ST (Store Transfer) receiving discrepancy report - If the quantity received on a store transfer is different than the original transfer quantity, do you want the user to get a pop up asking them to accept the changes or exit and continue looking into the store transfer?

Select M-fields to display in M pop-up during receiving - Which M-fields want to display in M pop-up during receiving

Select default M fields to update during receiving - At the point of receiving there is a $ under the PO Cost Price column. Using this custom setting you can choose which prices show as editable at the point of receiving by clicking the $ sign. Common use may be to update current cost or M Field pricing (suggested retail, jobber, etc) at the point of receiving.

Default action on partially received ST popup - This will default all of the check boxes on the popup you get after receiving, and having some items not received. This is a time saver on large ST with a lot of unreceived items.

Show by Default Related SO column during receiving PO - When this setting is turned 'ON', the Related SO column will be displayed by default. There is also a check box called 'Toggle Related SO Column' added to the receiving pages to allow you to toggle this display from with in the receiving page.

Default receipt # to blank, and require user to enter receipt # during receiving - Setting this option to 'ON' will result Blank textbox available for 'Receipt Number #' on 'Receive by PO Number' and 'Receive by Product (PO)' page. Setting this option to 'OFF' will result generate system number automatically for 'Receipt Number #' on 'Receive by PO Number' and 'Receive by Product (PO)' page.

Bypass PO Receiving Page 2 (Cancel or Backorder) - If you only want certain roles to be able to edit the backorder/cancel pop-up while finalizing receipts, use this..
Turn this to ON and push those roles to the right that you do want to give access to the backorder or

cancel options. Backorder and cancel selections will default to the selection made in the vendor record for 'Backorder/Cancel' and the selected roles will NOT have the ability to change this when receiving.

Hide all costs related fields during receiving Store Transfers - Do you want to hide cost information when receiving Store Transfers? If NO, ensure this setting is OFF. If YES, ensure this setting is ON. If turned on you can choose roles that you still want to be able to see cost information and move them to the right. If turned ON, those roles NOT pushed to the right will NOT be able to see price information when receiving Store Transfers.

Hide all costs related fields during receiving Purchase Orders - Do you want to hide cost information when receiving Purchase Orders? If NO, ensure this setting is OFF. If YES, ensure this setting is ON. If turned on you can choose roles that you still want to be able to see cost information and move them to the right. If turned ON, those roles NOT pushed to the right will NOT be able to see price information when receiving Purchase Orders.

Receive to Primary Location - This CS would allow the user to receive products directly to a primary location if set in PPL Module.

InterFax Details

InterFax

You now have the option of faxing SO's and PO's through Fuse5. We have partnered with a 3rd party company called Interfax, who will handle the faxing. In order to fax through Fuse5 you will need to go to http://register.interfaxus.com/fuse5 and set up an account with them. Once you have created your Interfax account and set up a payment method with them (currently .06 cents a page) you will be able to fax. You will need to enter your Interfax user name and password into the Fuse5 custom setting 'InterFax Details'. Interfax has their own portal to allow you to see your faxing history and status. They also have some other neat features that you can take advantage of outside of Fuse5.

To set up a fax number on an Account, open the account record and enter the fax number into the 'Fax' field. To set up a fax number on a Vendor, open the vendor record and enter the fax number in the the fax field of your choice (Customer Service Fax, CSR Fax, Tech line Fax, or Sales Rep Fax). Once you have entered a fax number into your vendor record go to the 'Fax PO Using' field and select the vendor fax field you wish to use.

Once these settings are in place you will be able to set an account's document preference to 'eFax Invoice' and use eFax functions through out Fuse5.

InterFax Details ⑦

| InterFax User Name | admin
Please enter your InterFax User Name |
| InterFax Password | ●●●●●●●●●●●●●●●
Please enter your InterFax Password |

Catalog

Epicor Catalog - Enable/Disable Epicor catalog

ALLDATA Catalog - Enable/Disable ALLDATA catalog which can be made available under POINT OF SALE > SALES ORDERS > ALLDATA - This is the catalog used for shops.

ShowMe TheParts Catalog - Enable/Disable SMTP (ShowMe TheParts) catalog

TecDoc Catalog - Enable/Disable TecDog catalog

Push Per Car Quantity From Catalog - Yes or No - Push Activant per car qty Instead of default order qty

View Catalog Setup - Set user role wise permission for viewing Catalog Setup
Add/Edit/Delete in Catalog - In Settings > Catalog Setup, Who can Add/Edit/Delete Suppiers / MCL / Categories. its based on Roles selected in custom setting. Only that roles can Add/Edit/Delete Suppiers / MCL / Categories in Catalog setting.

Stock Options - Select stock options for searching in Activant catalog

Catalog Sort Order - Choose the order that your catalogs display in the catalog pop up. If using more than one catalog, the catalog at the top of the list will have accessability by using hot keys such as F1, F2, and F3.

Nexpart Catalog – Enable/Disable the Nexpart Catalog

Hide "Lookup Type" From EPICOR Catalog – Tunr ON to hide the "Lookup Type" when using the EPICOR Catalog.

Partslink Catalog – Enable / Disable the Partslink Catalog.

WHI Catalog – Enable / Disable the WHI Catalog.

Catalog Sort by (SMTP) - Do you want to change the default sort order in the Show Me The Parts catalog? The default for this is to sort by MFG (Manufacturer) but you have the option to switch to

'Part Type'.

Delivery

Delivery Methods – You can add or delete deliver methods used by your business. Once they are added to the box on the left, you can choose the delivery methods that will be available in the Fuse5 delivery module by pushing it to the right side. The list on the left shows ALL possible delivery methods in Fuse5. You can create/remove from this list by clicking the "+"/"X" below it. You decide what is in the list. The list on the right lists only the delivery methods (from the left) that are handled by the the Fuse5 Pending Delivery Module (PDM). The delivery methods that are ONLY in the list on the left are included in the delivery method choices in Fuse5, but not handled by Fuse5 beyond that. Only the ones on the right are tracked by the Fuse5 Delivery Module.

If you are using Elite Extra, instead of the Fuse5 PDM, then the list on the right does not effect the delivery method options at all. It is ignored. Only the delivery methods on the left hand list are used as options. You need to make sure ""Elite Extra"" (Spelled exactly like this) is in the list so that Fuse5 can send delivery information to Elite Extra.

You cannot use both Elite Extra and the Fuse5 PDM at the same time. You either use one or the other to manage deliveries.

Note: Elite Extra is a 3rd party delivery management module that Fuse5 has partnered with. If you have questions about Elite Extra, go to eliteextra.com

Delivery Methods Popup on SO Detail View - If this setting is ON then on second page of the Sales Order, the user can see the Delivery Method Popup and from that popup user can change the Delivery method of SO. Will also have access to the Target Delivery time from page 2 of the sales order.

Manage Deliveries with Elite Extra – Turned on to allow for Elite Extra integration in fuse5 if you are using Elite Extra as your delivery module.

Add Default Box Sizes for Shipping – This allows you to create default box sizes for shipping and selection when using the UPS integration. You create the boxes with a name and the length, height, and width.

Products

Use Alternate Sort Order for - This setting depends on the Product Listing page sort order of the product# or Product stripped.
BMW - Always 11 numeric characters. Reads left to right. Format is XX XX X XXX XXX.
Mercedez - Usually 10 numeric characters. Format is XXX XXX XX XX. Reads: 678 123 910 45
Porche - Usually 11 numeric characters. Format is xxx xxx xxx xx. Reads: 789 123 456 1011.
Volkswagen - Minimum 9 alpha/numeric characters. Numbers sort before letters. Reads: 789 123 456.

User can enter line items on this and if in product Search when user searches with Linecode then we will decide sort order based on entered linecode in any of the field.

Product Pass on Fields - User can enter one product which will then be used to set up pass on fields. Pass on fields allow users to make edits to data in a product field and have that change occur for all locations in the location specific product information. Example, if current cost changes for one location and you want it to automatically change for all locations, make current cost a pass on field in the product record selected with this custom setting.

Automatically Rank Old Parts and Remove Reorder - When this is set to yes, Fuse5 will run a process to change product rank to **"X"** and reorder to **"No"** on what it deems to be parts that have had no activity for a period of time. This process happens **once a week on Sunday morning.**

The logic is as follows...
Using the **"Cron specific Weeks Before X rank"** setting, if a part has not had activity within this number of weeks, the rank and reorder are set to "X" and "No", respectively. Activity is evaluated in this order based on fields you can find in the product record.

1) Has product been **LAST SOLD** longer than this number of weeks? If **LAST SOLD is blank (never sold), continue to #2**.
2) Has product been **LAST RECEIVED** longer than this number of weeks. If **LAST RECEIVED is blank (never received), continue to #3**.
3) Has product been **CREATED** longer than this number of weeks. If **DATE CREATED is blank, continue to #4**.
4) If non of the above, do nothing.

**Caution: Note that this process is going to potentially set Reorder to "No" in a lot of parts.
If you do not agree with the above criteria, <u>DO NOT USE THIS FEATURE.</u> There is NOT an automated process to undo the changes.**

POS (Point of Sale) Core Log: Battery Lines - enter the LINE codes for the batteries you want to display on the Core Log at the Point of Sale.

Display Product Website Button in POS Line Item – If you have assigned a website to a product in the product record, do you want to see that website displayed at the Point of Sale if this product is added?

Default Reorder – When creating a new product do you want the default reorder status to be YES or NO?

Default Part Taxed - When creating a new product do you want the default tax status to be NEVER, ALWAYS, or CONDITIONALLY NO?

Auto – Run Sales Rank Groups - Do you wish to automatically run the Sales Rank Group process? When this setting is turned 'On', Sales Rank Groups will automatically rank the selected Products once

per week.

Kits

Kit Category – Use this to create categories for your KITS. If you have added categories, when you create KITS you can assign it to one of these categories.

WHI: EBAY EXPORT

EBAY EXPORT OPTIONS – only used if you are exporting products for Bay auctions.

Home Page

Home Page "Reorder No / Buyout & Lost Sales" Alert Display Settings – on the home page you have the ability to see an alert that displays products that were ordered through the buyout functionality at the Point of Sale with a reorder status of NO. Use this option to determine if the products never clear from the report until you delete them or choose to have them fall off after one week or one month. This setting allows the user to select how long the 'Reorder No /Buyout' and 'Lost Sales' alerts are retained when users do not take any action on the alerts.

Who can have dashboard Graph? - This setting allow the user to choose which roles can view the Home Page dashboard graphs.

View Alert "Store Transfers older than 3 days, not received yet" - Choose which roles that should receive an alert for store transfers that are older than three days and haven't been received into Fuse5.

"Lost Sales" Alert View Options - Allows you to choose if the lost sales alerts are for the users current location or for all locations.

View Sales Target Graph By Location - This custom setting allows you to select the roles that are able to view this Graph.

View Sales Target Graph By Sales Area -This custom setting allows you to select the roles that are able to view this Graph.

View Sales Target Graph By Sales People -This custom setting allows you to select the roles that are able to view this Graph.

View Sales Target Graph By Counter People -This custom setting allows you to select the roles that are able to view this Graph.

Buyout Received Alert Display Setting -This setting allows you to select the the duration of time in which the 'Buyout Received Alerts' are deleted form the dashboard. The options are 'Current Month' and 'Never Clear Until I do'

Location Based Dashboard Restriction - This setting will restrict access to the user's 'Default Location' when viewing dashboard graphs. If the setting is off then all roles will have access to all locations assuming they have access to the individual dashboard graphs.
You must add roles that will be restricted after turning this setting on.

Dashboard Sales by Account Default Location - Turning this setting on will result in the 'Weekly Sales History by Location Graph' and the 'Monthly Sales History by Location Graph' on the dashboard displaying sales results based on the Account Default Location instead of the location where the sales were actually processed.

Report Settings

Update QoH in Physical Inventory Report - Designate which roles are allowed to update QoH in the Physical Inventory Report available in fuse5.

Time Card Module Access - By turning on and choosing roles, you are giving non-admins the ability to access and edit the time card, payroll report, user log in history, and audit trails modules.

Location Based Report Restriction - This setting will restrict access to the user's 'Default Location' when running any reports that require the user to select specific locations. If the setting is off then all roles will have access to all locations in reporting. You must add roles that will be restricted after turning this setting on.

EDI Settings

WH Sort Order - choose the order you see inventory information within the warehouse if you use this

functionality.

Prime Automotive Babel Test - if using this service, select the locations to be hooked up to.

UNI – Select Auto Plus-Store 674 - if using this service, select the locations to be hooked up to.

UNI – Select USA (10) - if using this service, select the locations to be hooked up to.

Transnet EDI Settings

In order for Transnet to work properly, there are several settings that need to be set. All of them come from Transnet as a result of signing up for their service. Please contact Transnet to set up your account and get the credentials required to access their system. These will be placed in the **Transnet EDI Settings** on the Fuse5 custom settings page. Also, every vendor that uses Transnet will have it's own unique **Transet PO Vendor ID** that will make the connection between you and them (something like ""FL#####""). This is set up in the vendor record settings.

You need to contact EACH vendor you want to use Transnet with and ask to be validated to their FL##### number. The FL##### vendor should then contact Transnet and ask for the validation of your Transnet Customer ID to their FL79xxx ID.

FTP Server URL -
FTP Server User -
FTP Server Password -
Mail Box User ID -
Mail Box User -
Mail Box Password -

Gcommerce EDI Settings

Fuse5 integrates with GCommerce, but they are a totally separate company. All information and testing is provided from your GCommerce account manager.
In order for GCommerce to work, you need to obtain several pieces of information from GCommerce and put them in your Custom settings and the Vendor Settings for the vendor that you will use GCommerce with.

GCommerce will provide the following information. This information is specific to your business and goes in the Custom settings.

Your Gcommerce ID -   1) Your GCommerce ID
Your Gcommerce Qualifier -   2) Your GCommerce Qualifier
Gcommerce "Bill To Party" -   3) GCommerce 'Bill to Party' setting
Gcommerce FTP -   4) GCommerce FTP

Gcommerce FTP Username - 5) GCommerce Username (for their FTP site)
Gcommerce FTP Password - 6) GCommerce Password (for their FTP site)

GCommerce will also provide the following information. This information is specific to the vendor you are connecting with.
1) Vendors GCommerce ID
2) Vendors GCommerce Qualifier
3) Gcommerce Test/Production flag

Once you have ALL of these settings in Fuse5, you must contact GCommerce and coordinate a test transmission with them. This is what the Test/Production setting is for in the vendor record.

GCommerce will also ask for 'Ship to Codes'. These are ALWAYS the same as your location numbers that are shown in the 'Company Locations' section of the company details in Fuse5.

Once you have one vendor up and running on GCommerce, any additional vendors will be much easier. All you will need is the new Vendor's information (ID and Qualifier) and a quick test coordinated by GCommerce. Everything else is the same.

CorCentric Edi Settings

Fuse5 integrates with CorCentric, but they are a totally separate company. All information and testing is provided from your CorCentric account manager.

In order for CorCentric to work, you need to obtain several pieces of information from CorCentric and put them in your Custom settings and the Vendor Settings for the vendor that you will use CorCentric with.

CorCentric will provide the following information. This information is specific to your business and goes in the Custom settings.

Your CorCentric ID - 1) Your CorCentric ID
Your CorCentric Qualifier - 2) Your CorCentric Qualifier
CorCentric "Bill To Party" - 3) CorCentric 'Bill to Party' setting
CorCentric FTP - 4) CorCentric FTP
CorCentric FTP Username - 5) CorCentric Username (for their FTP site)
CorCentric FTP Password - 6) CorCentric Password (for their FTP site)

CorCentric will also provide the following information. This information is specific to the vendor you are connecting with.
1) Vendors CorCentric ID
2) Vendors CorCentric Qualifier
3) CorCentric Test/Production flag

Once you have ALL of these settings in Fuse5, you must contact CorCentric and coordinate a test transmission with them. This is what the Test/Production setting is for in the vendor record.

CorCentric will also ask for 'Ship to Codes'. These are ALWAYS the same as your location numbers that are shown in the 'Company Locations' section of the company details in Fuse5.

Once you have one vendor up and running on CorCentric, any additional vendors will be much easier. All you will need is the new Vendor's information (ID and Qualifier) and a quick test coordinated by CorCentric. Everything else is the same.

Organizational Management – If you set up Organizational Management you will want to go to User settings > Organization Access Level to determine what level of access an individual user has.

Manage Regions - This interface gives users the ability to create Regions, delete Regions and select or remove Locations from the Region. In order to manage a previously created Region, simply click on the name of the Region. Organization hierarchy in Fuse5 is based on Locations being part of a Region, Regions being part of a Division, and all Divisions will be in the overall Company hierarchy.
These hierarchies can be used to manage which vendors will appear in the Out of Stock pop-up at the Point of Sale, to manage who can access and edit Sales Targets and to manage who has access to time cards/payroll.

Manage Divisions - This interface gives users the ability to create Divisions, delete Divisions and select or remove Regions from the Division. In order to manage a previously created Division, simply click on the name of the Division. Organization hierarchy in Fuse5 is based on Locations being part of a Region, Regions being part of a Division, and all Divisions will be in the overall Company hierarchy. These hierarchies can be used to manage which vendors will appear in the Out of Stock pop-up at the Point of Sale, to manage who can access and edit Sales Targets and to manage who has access to time cards/payroll.

Restrict Report Access to User's Organization Access Level - When this setting is turned On, Fuse5 will only allow users access to locations in Reports associated with their Organizational Access Level as defined in the User record.

Restrict Dashboard Access to User's Organizational Access Level - When this setting is turned On, Fuse5 will only allow users access to locations in Dashboard Graphs associated with their Organizational Access Level as defined in the User record.

Restrict Sales Target Access to User's Organization Access Level - When this setting is turned On, Fuse5 will only allow users access to Sales Targets in Locations associated with their Organizational Access Level as defined in the User record.

Lock User Settings to Admin - Do you want to lock down Users so that only the Personal Information can be edited by Users without Admin privileges? Turn this setting on

Manage Zipcodes – currently in development

Other

Who can add / edit Announcements? - Who can edit the announcement that scrolls across the top of your fuse5 website? - Designate which roles have the ability to add/edit the announcement that scrolls across the top of fuse5. This can be edited under PERSONAL & ADMIN > ANNOUNCEMENTS (under company settings on the main Personal & Admin page)

EOD Allowed For - Designates which users will show up as available if you do End Of Day by user rather than by location.

Who can Mass Update for Module? - Designates which users have the ability to use the MASS UPDATE function on each module.

EOD (End of Day): Resolve CODs (Cash on Delivery) daily - When this option is turned on, users will be required to finalize CODs before they can create an end of day reconciliation. This setting will only affect CODs created in the past 7 days.

Factor receiving on receiving exchange rate - Do you create Purchase Orders from vendors / suppliers that use a different currency than you. If so, you should turn this to ON. It is used in conjunction with location and vendor settings.

CC Email for Support Requests - A copy of emails submitted through the 'Support' link at the top of Fuse5 pages will also be sent to this email address.

Who can download accounting data CSV file - Only the roles listed here will be able to download the accounting data files that are available for export from Fuse5.

VIR Costs Pop-Up Behavior - If you are going to adjust pricing when doing Vendor Invoice Reconciliations, do you want to change pricing for only the location you are doing the reconciliation for or for all of your locations? If only for your location choose CURRENT LOCATION. If you want to update for all locations, choose ALL LOCATIONS. This setting changes the default behavior of the VIR Costs Pop-Up that you receive when saving a Vendor Invoice Reconciliation (VIR). As always users may manually change the locations where costs are being updated in this pop-up, this setting only changes the locations that are chosen by default.

Disable Users Ability to Push End Of Day (EOD) Reconciliations to Quick Books - Do you have users that will be doing End Of Day Reconciliations, but you only want them to have the ability to do it in pending status? If so, choose the roles from the left and push them to the right to remove their ability to push End Of Day reconciliations to Quick Books. This is useful if you have store managers or other roles that create End Of Day reconciliations, but you have an accounting staff member that manages the Quick Books integration.

What do you want to display on your Payroll Report? - Will you be using the Fuse5 time card and

payroll report functionality? If so, choose the data you want displayed on your printable / exportable payroll report. Choose the data you want to show on the report by choosing it and pushing it to the box to the right.

Work Week Overtime -This setting allows the user to define the work week as it applies to overtime calculations in Fuse5. Enter the first day of your companies 'work' week as it applies to overtime. For example, if you select 'Monday' as the first day, then 'Sunday' will be considered the last day of the work week. If you enter 'Sunday' as the first day, then 'Saturday' will be considered the last day of the work week. As a reminder, Sick, Vacation, Holiday, and Personal hours do NOT count towards overtime in the Fuse5 calculation. Any alternate overtime calculations will need to be done by the user after exporting the payroll report.

Default In and Out Time on Time Card - Will you be using the Time Card within Fuse5. If so, you may be adding IN and OUT punches. This is the time that added punches will default to. The hours should be set in military time / using a 24 hour clock. Ex. 5:00PM = 17:00

Allow User Selection During ROA (Received on Account) Creation - If this setting is OFF, then when users are processing ROA's and ADJ's Fuse5 shows the user that is currently signed into Fuse5 as the user that is creating the ROA or ADJ.
If you turn this setting ON, users will have the ability to select any user in the system to show as the user processing the ROA or ADJ.

Display Usernames OR User First-Last Names througout Fuse5 - In the user settings you give a user a login name and can enter their first and last name. This is where you choose what you want displayed throughout Fuse5 for your users. Do you want to see their loggin name (which in some cases is a number or just a first or last name) or do you want to see their full first and last name?

End of Day Password Requirement - Do you want to require User to enter their Username/Password in order to complete the End of Day Reconciliation? If so, turn this setting on

Allow Barcode for Fuse5 Login – Do you want to allow users to log in to Fuse5 and perform any password authentications (Past Due Lockout, Over Credit Limit Lockout, etc) using a barcode for single line authentication. If so, turn this setting ON. If ON, and a user has their user setting "Barcode Accepted for Login" turned ON and they have a barcode in the "User Barcode" field in the user record, they will be able to login by simply scanning their barcode. Users still have the ability to enter their user name and password even if this setting is turned on. If turned on ALL users will see an additional field for "Barcode" on all interfaces that require the user name and password. Note: Single line authentication (logging in with only a barcode) is an inherently less secure login process. We do not necessarily recommend this for most subscribers.