

Sales Management

Accounts

Every one of your customers must have an account that identifies them. This will almost always be a unique account for each customer or business you deal with. However, you may optionally just have a single catch-all account such as “Walk-In Customers” for people who walk in off the street looking for accessories and are not likely to be repeat customers. We recommend that you create an account for everyone who buys anything from you, even if they are likely only a one-time customer, but that is up to you.

Another possibility is that you may have a single large business client with several accounts in a parent/child relationship. When you set up a parent account with one or more child accounts, your parent account statements will include the child account activity as well. This provides a single statement for several accounts to provide to their main account office.

To access the Accounts listing page go to SALES MANAGEMENT > ACCOUNTS. As with all the other listing pages within Fuse5 you can do searches and filters within the listing page that allows you to look at specific information or accounts.

Create Account

Accounts can be created in Fuse5 manually one at a time or you can import batches of them using information from a spreadsheet saved in CSV (comma separated values) format. The manual method will be covered first, since this will explain the many options you can set on an account. Once you are comfortable with these options, you can look at doing a batch update to import data in bulk. More than likely you will use the batch update method to move account information from your old system into Fuse5.

To see a list of existing accounts, go to Sales Management → Accounts, then click on the SHOW ALL button (top right) to see all accounts, or search for an account by account number or name in the upper middle of the screen.

To edit an existing account, you click the edit icon on the right to open the screen where all the account information is managed.

To create a new account, either go into the Sales Management → Accounts → Create Account menu or click the plus sign at the top of the Account listing page.

Default Template Set: None or Account Name: If no account has been set as default it will say none, if an account has been set it will have the account name. If no account has been set as default you can use the MAKE THIS DEFAULT TEMPLATE button to set as default. If you want to use the template in the future to make additional accounts, simply go into your default account and hit the DUPLICATE button.

If you set a default account up, this is the account that will populate at the Point of Sale when creating an account.

Fuse5 Training Materials

Based on important logic within fuse5 and the necessity to ensure that a user is specifically selecting some of the account criteria, not ALL lines in an account record can be duplicated or set to default. The following fields can copy to a new account, all others must be set up per account.

Sell Price
Sales and Promotions
List Price
Default Price
Number of Invoice Copies
Invoice Resequencing
Pack Resequencing
Pick Price
Pack Price
Needs PO
Blanket PO
Blanket PO Number
Back Order
Default Delivery Preference
Show SC pop-up
Core Type
Terms
Tax Status
Tax Number
Use Location Sales Tax
Silo Tax
Local Tax
State Tax
Statement Type
Statement Frequency
Affects AR
Prorated Returns
Lockout
Lockout Password Level
Past due Lockout
Credit Limit
Stop Over Credit Limit
Finance Charge
Annual Finance Charge Percentage
Minimum Finance Charge
Default Payment Method
Acceptable Payment Types
Documentation Preference
Default SO General Comment
Default SO Shop or Parts
A/R Type
Statement Transaction Type
Default Location

Default Template Set : ZEAGLER AUTO SERVICE, INC.

Make This Default Template

Duplicate

Delete

Add Autos

Duplicate – Allows you to make a duplicate of the account you are currently viewing.

Delete – Allows you to delete the account.

Add Autos – this button allows you to add automobiles to an account that will show up as available at the Point of Sale when doing sales orders.

Account Information Line Items

Account Information:

Account Number (Required) - This is a unique number to identify the account. Fuse5 will suggest an account number when you create a new account. However, you can override this with anything you wish at the time of creation. If you are importing accounts from a legacy system you will probably want to maintain those same account numbers for consistency.

Account Name (Required) - This is a unique name to identify the account. This is almost always the name of the person or business. It should be easily readable and make sense to the Fuse5 users. If you have multiple accounts with the same name, you will need to make the name unique by adding a store number, city, or something logical (like 1, 2, A, B, etc...). It should be something that the customer can easily self-identify also as it will appear on the invoices that you provide to them.

Sales Person (Optional) - This is the sales person who is primarily responsible for this account. That determination is up to you.

Sales Group (Optional) - Choose the Sales Groups this customer belongs to. You can select multiple sales groups by holding the <ctrl> key and clicking the choices you want.

Sales Area (Optional) – Sales Area is where you will define the Locations that are to be included in your Sales Areas. This can be set up by going to Data Tools > Sales Targets > Sales Area.

Account Category - This is an optional generic category you can give this account. It allows you to run reports based on a value you choose to put in this field.

Examples might be 'Dealers', 'Shops', 'Jobbers', 'Government', etc... You can use any terminology you want that is 25 characters or less.

The idea is to allow you to categorize your accounts into logical segments that will allow you to evaluate them separately.

Website (Optional) - If the customer happens to have a web site of their own, you can put it in here. This is used for reference purposes only at this time.

24 Month Payment History (Optional) - This is where you would put the payment history from your legacy system if you choose to do so. Some systems use a 12-character scheme to represent the last 12 months of payment history. If your system does not support it, don't worry about it. It is informational only and does not impact Fuse5 accounting.

Title (Optional) - Title of contact name (Mr., Mrs., Ms., etc.)

Contact First Name (Optional) - First name of the primary contact at this location, probably the owner or general manager.

Contact Last Name (Optional) - Last name of primary contact.

Phone (Optional) – Primary account contact phone number. This setting will also allow you to store additional phone numbers for the account by clicking on the bold “Phone”.

Other Phone (Optional) - Secondary account contact phone number.

Created Time (Informational) - Generated by Fuse5 when the Account file is created.

Modified Time (Informational) - Generated by Fuse5 any time the Account file is modified.

Fax (Optional) - Fax number of Account.

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.

Email (Optional) - Primary email address for this account. Will be used for Fuse5 marketing campaigns. This is the email that sales order invoices will be sent to. It can also be selected as the email to send Credit invoice emails (for customer returns) or monthly account statements. This is selected by choosing 'Email' in the Credit invoice email or Statement Email option below.

Other Email (Optional) - Secondary email address for this account. This is an alternate email address that you can choose to send Credit invoice emails (for customer returns) or monthly account statements. This is selected by choosing 'Other Email' in the Credit invoice email or Statement Email option below.

Credit Invoice email - Accounts can choose to have their Credit Invoices (invoices with a negative total) sent to a specific email address of their choice. Account records have two fields for entering email addresses, Email and Other Email. We have added a new field called 'Credit Invoice Email' to allow you to choose which email field to send Credit invoices to. By default, credit invoice emails (for customer returns) will go to the Email address above. If you want credit invoice emails to go to a different email address, select Other Email here and enter the email address in the Other Email option above. The 'Credit Invoice Email' field will default to 'Email'.

Statement Email - By default, account statement emails will go to the Email address above. If you want account statements to go to a different email address, select Other Email here and enter the email address in the Other Email option above

Email Opt Out (Yes/No) – Setting this to “No” will prevent this account from receiving emails generated from Fuse5 managed marketing campaigns.

Charge Gross Receipts Tax - This field defines whether or not this Account will get charged a Gross Receipts Tax. This is used if you have specific customers that must pay an extra tax for certain products. (ex. Connecticut charges out of state customers an extra tax on petroleum products)

Related Settings:

Custom Setting 'Enable GRT Tax'. In order to enable Gross Receipts Tax this Custom Setting must

Fuse5 Training Materials

be turned on. This is also where users define what the taxation rate will be.

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.

Mailing List Opt Out (Yes/No) - This is used to remind you if a customer has requested to NOT receiving marketing materials through the mail.

Member Of (Optional) - This field allows you to select another account file to populate the mailing address information for this account. This is NOT related to Parent/Child relationship settings.

Employees (Optional) - Number of employees the customer has. This is information that is used by the Customer Relation Management portion of Fuse5.

Annual Revenue: (\$) (Optional) - Annual revenue of the customer. This is information that is used by the Customer Relationship Management portion of Fuse5.

Default Location (Required) - This is your store/warehouse location that this account primarily deals with. If you only have one location, this will always be the same. If you have multiple locations, this will be an important field to pay attention to. The drop down is populated with store locations you have set up in the Fuse5 Company Details settings.

IMPORTANT NOTE for those that use the call center functionality of Fuse5: If you have Fuse5 users that are configured to have their "SO default Location" set to "Default Account Location" (instead of the normal "User Location" setting), the sales order screen will work slightly different. Normally, when you create a new sales order, the Counter Person Location is populated with the default location of the Fuse5 user. However, in the call center scenario above, the Counter Person Location is populated based on the Default Location in the selected customer account. This allows a single person in a call center to quickly take orders on behalf of several store locations.

Accept Aconnex Return (Yes/No) – Set whether Returns are allowed from the Account via the AConneX® connection.

Aconnex Buyer ID – (Optional) - Accounts must be set up in Fuse5 to purchase through AConneX®. Set up an AConneX® Buyer ID in Account Information. The Fuse5 Buyer ID is typically set to the Account Number for the specific Account. However, this is a user-defined field and may be set or changed to meet Company needs.

Provide the Account representative with the 16-digit AConneX® Seller ID obtained from the Aconnex Seller Configuration process and the Buyer ID from the field to your Account representative to use when transmitting purchase information via AConneX® Electronic Data Interface (EDI).

Account Information			
Account Number	A5178	Fax	
Account Name	Zzz Jeff's Garage	Email	jeff.dalton@fuse5.com
Sales Person	admin	Other Email	
Sales Group	10	Credit Invoice email	
Sales Area		Statement Email	
Account Category		Email Opt Out	no
Website		Charge Gross Receipts Tax	Yes
24 month payment history	0000000000000000432100033	Mailing List Opt Out	No
Title		Member Of	
Contact First Name	Jeff	Employees	
Contact Last Name	Dalton	Annual Revenue	
Phone	867-53091 Phone	Default Location	Bora Bora
Other Phone		Accept Aconnex Return	no
Created Time	12-04-2012 14:07:53	Aconnex Buyer ID	
Modified Time	10-13-2016 11:26:28		

Custom Information:

Sell Price (Required) - The name of the Price Plan that will be used to calculate this account's selling price.

Account Exceptions (Optional) - If this account has exceptions to the Sell Price Plan chosen above, instead of creating a whole new Sell Price Plan for these exceptions, you create an exception in the “Exceptions Plans” area of Fuse5. A customer may have several exceptions and you can select multiple exceptions by holding the <ctrl> key while clicking on items in this list.

Sales and Promotions (Optional) - Sales and promotions are essentially the same as exceptions, but they are intended to be temporary.

List Price (Required) - The name of the List Price Plan that will be used to display list price on this account's Sales Orders.

Default Price (Optional) - This price reference field is used only in the event that there is not a Price Plan, Exception, or Sales Promotion that covers a product. When that happens the sell price on a Sales Order will default to the amount that is in the product price field you specify here.

NOTE: This field WILL NOT be used if one of the price plans covers a product and resolves to \$0.

This only covers products that are not covered by any price book in any way.

Default Shop Price (Optional) - If you have set the Default Shop Price to YES in custom settings, fuse5 will first look to the account to see which price field you have established for shop pricing, then will look out at the products on the sales order and pull the prices from that M field rather than using a standard sell price plan.

Number of Invoice Copies – How many copies of the sales order should print? This is only used if you want to override the location setting regarding the same for this particular account.

Web Discount % - This field is used to give percentage discounts if parts are ordered from an e-commerce site. If you don't want to give a discount, just set it to 0.

Advertisement Settings (Informational) - If you click this link, it will allow you to see the current advertisements allocated to this account. From here, you can edit those advertisements

Number Of Invoice Copies (Optional) - This is the number of invoice copies this account prefers to have printed. NOTE: Simply putting a value here does not cause invoices to be printed. You must ALSO choose “Print Invoice” in the account's documentation preference.

Invoice Re-sequence (Yes/No) - If you say “yes”, instead of printing the invoice line items in the same order you typed them into the Sales Order (usually random), Fuse5 will print it in descending order, sorting on line code and product number.

Pick Re-sequence (Yes/No) - If you say “yes”, instead of printing the line items on the Pick Ticket in the same order you typed them into the Sales Order, Fuse5 will print it in descending order, sorting on line code and product number.

Pack Re-sequence (Yes/No) - If you say “yes”, instead of printing the line items on the Packing List in the same order you typed them into the Sales Order, Fuse5 will print it in descending order, sorting on line code and product number.

Pick Price (Yes/No) - Select “Yes” if you want the price printed on the Pick Ticket.

Pack Price (Yes/No) - Select “Yes” if you want the price printed on the Packing List.

Kit Pricing - In the Kit record, it is possible to establish up to three different Kit Pricing tiers (as well as the default Sell Price). The names of these Sell Price tiers are set by clicking 'Sell Price Column' in any Kit record.

Needs PO (Yes/No) - If this is set to “Yes”, then this customer is required to provide a PO number when making any kind of purchase, including cash, check, or Credit Card. This could be blanket PO that you can enter in the Account file, or it can be one that is provided at the time of purchase and that you must type into the Customer PO # field on the Create Sales Order screen.

Blanket PO (Yes/No) - Some customers will have a single blanket PO that they will use for all purchases from you. If they do, you would select “Yes” here and enter the number in the “Blanket PO Number” field in the Account file. When a Sales Order is created, the Blanket PO number will automatically be populated in the Customer PO # field when their account is loaded.

Blanket PO Number - If Blanket PO is set to “Yes”, this PO number will be automatically populated

Fuse5 Training Materials

in the Customer PO # field when you create a Sales Order for this account.

Back Order (Yes/No) - If this is set to “Yes”, then this account is allowed to back order products.

Route (Optional)-This is where you identify a pre-established route that this account is located on. You can arbitrarily name the routes to whatever makes sense, then your drivers (using the delivery module of Fuse5) can quickly identify which parts they should take with them to be delivered on that route. For example, you can label routes North, South, SW, Truck2, etc.

Stop (Optional) - This is the order of the account stop within a route. You can either carefully assign these sequentially on a route, or alternatively, use them as an order of precedence to identify which customers you want to give delivery priority to (for example 1 equals top priority, and 10 is lowest priority). This is an optional field for you to use at your discretion. Between these two fields, you can create an effective and customized delivery strategy.

A combination of the Route and Stop will show up in the delivery module as a combined name. In the Pending Delivery Module, if you have route set to A, and stop set to 1, it will look like this...

View deliveries for Multi-locations : ☒ Bora Bora ☐ Fiji ☐ Tahiti ☐ Samoa ☐ Easter Island ☐ Cook Islands ☐ Solomon Islands ☐

Process Settings Remove Deliveries Deliver/Picked Up Assign Deliveries To

	Minutes until You're Late	TDT	Location	Route	S
<input type="checkbox"/>	2 Days, 5 Hrs, 2 Mins, 53 Secs LATE	4:06 AM 08-07-13	Bora Bora	GTT DS	
<input checked="" type="checkbox"/>	More Than 1 Month LATE	8:38 AM 07-09-13	Bora Bora	A1	
<input type="checkbox"/>	11 Days, 2 Hrs, 42 Mins, 53 Secs LATE	9:26 AM 07-29-13	Bora Bora	A1	
<input type="checkbox"/>	11 Days, 2 Hrs, 13 Mins, 53 Secs LATE	9:55 AM 07-29-13	Bora Bora	A1	
<input type="checkbox"/>	11 Days, 2 Hrs, 10 Mins, 53 Secs LATE	9:58 AM 07-29-13	Bora Bora	A1	

.....in the Assigned Delivery Module it will look like this.....

Address Street	City	Route	Action
1340 ROSEWOOD DRIVE	COLUMBIA	GTT DS	
		A1	
		A1	
		A1	
		A1	
		A1	PO
		A1	
		A1	PO
		A2	

Drive Time (Optional) - Estimated amount of drive time to get from your default sales location for this

account to the account address. This is an optional field that you must estimate yourself.

Default Delivery Preference (Selection list) - The default method by which this account receives parts. If they normally pick products up at one of your locations, this would be "Will Call". If this is a repair shop that normally gets deliveries, you might say "Our Truck".

NOTE: You establish which delivery methods are available in this selection list in the Delivery section of Custom Settings under "Personal and Admin".

Push to Delivery mobile (Yes/No) - If this is set to "Yes" then the delivery information is synced with the mobile delivery module which allows drivers to use their PDA or Smart Phone to connect to your Fuse5 account.

Minimum Delivery Time (Optional) - Minimum amount of time (in minutes) that the counter person can promise a part to be delivered in.

Maximum Delivery Time (Optional) - Maximum amount of time (in minutes) that the counter person can allow a part to be delivered in.

Normal Delivery Time (Optional) - This is used to calculate the default delivery time. Fuse5 sets the target delivery time in the delivery module using the time value entered here plus 5 minutes.

Use Delivery Handicap (Yes/No) - Selecting "Yes" will cause slow paying customers to be moved down the list in the pending delivery module and allow your on time paying customers to move up the list in deliveries so they get deliveries first. It does this by adding 10 minutes to the normal delivery time for customers with this set as Yes.

Receiving Hours (Optional) - This is a text field where you can enter the receiving hours for the account. NOTE: The information entered here will only be printed if you also select "Yes" for the "Print Receiving Hours" option in the Account file.

Print Receiving Hours (Yes/No) - Choose "Yes" to print whatever you typed in the "Receiving Hours" field in the Account file on the sales order printout.

Status Code (Optional) - This is displayed on the Create Sales Order screen just below the account name after you have entered it. It is intended to be a quick visual reference for the status on the account. Choices are New/Normal/Upset/Past Problems/Unhealthy/VIP.

Status Code Notes (Optional) - This is text that you wish to display in the Account section of the Create Sales Order screen (For example, "We were an hour late on the last delivery", or "Remind this VIP that they are receiving 15% off all purchases this month"). This appears just below the Status Code graphic.

Display Until (Optional) - This is an expiration date for the Status Code Notes. After this date, the note will no longer be displayed.

Show SC pop-up (Yes/No) - If this is set to "Yes" a window will pop up containing the Status Code and Status Code Notes. It is intended to bring extra attention to the Status Code and/or Notes, since the user creating the sales order cannot continue until they close it.

Core Type (Price or Count) - "Price" is the normal method by which you to charge for (and refund) the core. If "Count" is selected, the core is not charged, BUT it is counted. Fuse5 will keep a running tally of cores you are owed from this customer. This tally can be found under the "Core Quantity Log" at the bottom of their account file.

A. Count - 'Core Sell Price' will always be \$0.00 for this customer. Cores are still added to the core log though.

B. Price - The charge for cores will be based on the 'Core Sell Price' from the product record.

C. Price 10% Discount - 'Core Sell Price' will be reduced by 10%. This will also affect 'Core Returns' with no related SLI.

D. Alt Core Sell Price - The charge for cores will be based on the 'Alt Core Sell Price' from the product record. This will also affect 'Core Returns' with no related SLI.

Tax Status (Always, Never, or Sometimes) - This field is used in tandem with the tax status of the specific product (every product has one) to decide whether or not to charge sales tax on a sales order item.

Tax Number (Optional) - This is a tax ID number provided by the IRS. You may want to get this from the customer if they claim special tax status, such as tax exempt.

Use Location Sales Tax (Yes/No) - Selecting "Yes" uses the tax rates for the store location the sale is being made from. Selecting "No" uses the tax rates specifically set for this account in the account file. This is usually set to "Yes". Your tax information is individually set for all your locations in **Personal & Admin > Settings > Company Details > Company Locations**.

State Tax (Percentage) - State sales tax rate for this account only.

Local Tax (Percentage) - Local sales tax rate for this account only.

Silo Tax (Percentage) - Additional local tax above the traditional State and Local taxes for this account only.

Tax Authority Code (Optional) - A tax ID that your State may assign to an account. It is for informational purposes only.

A/R Type (selection) – this setting lets you choose between Open Item and Balance Forward A/R management. Must select Open Item if you want Statement Transaction Type to be Open Item or Hybrid OI. Must choose Balance Forward if you intend to have Balance Forward as the Statement Transaction Type.

Statement Transaction Type (Selection) - This setting allows you to determine what items will be displayed on the statements that you send this customer. Hybrid is all items for selected date range, and then open items beyond that. Options are Open Items, Balance Forward, or Hybrid OI.

The A/R Type and Statement Transaction Type fields are tied together.

An A/R type of balance forward, requires the Statement transaction type of Balance forward.

If the A/R Type is Open Item, the Statement Type can be either Hybrid OI, or Open Item

Statement Type (Selection) - Use this field to select what type of statement this account will receive. The options are Print, E-mail, or Both.

Terms (Optional) - These are the financing terms that will be applied to the account when statements are generated. The options are No credit, Net 1, 10, 10-2%, 10-2% on partial, 10-2% on Net 30, 15, 45, and 60.

1) Net 30th - **Payment of new credit is due by 11:59PM on the last day of the month, which could be 28-31 days** following the month the credit is given.

*example: Charge made on May 5, statement provided June 1. If paid by June 30, no finance charges. On July 1 finance charges are applied to this charge and all other outstanding balance from before June 1, and **every end-of month** thereafter.

2) No Credit. **Means, not a charge account. Also, make sure to NOT make the "charge" payment method an acceptable payment method.**

3) Net 10th - Payment of new credit is due within 10 days of the 1st day of the month following the month the credit is given.

*example: Charge made on May 5, statement provided June 1. If paid in full by June 10, no finance charges. On June 10 **at 11:59 PM** finance charges are applied to this charge and all other outstanding balances from before June 1, and every 30 days thereafter (June 10, July 10, etc...).

Fuse5 Training Materials

4) Net 10th, 2% - Same as net 10th, but a 2% discount is applied **based on the amount due by the 10th, if that amount has been paid in full. Discount is applied to the account on the 10th at 11:59 PM if the previous balance has been paid in full.**

5) Net 15th, same as Net 10th, but have until 15th to pay. Finance charges added every 30 days on (June15, July15, etc...).

6) Net 45th - Payment of new credit is due within 45 days of the 1st day of the month following the month the credit is given.

*example: Charge made on May 5, statement provided June 1. If paid by July 15th, no finance charges. On July 15 finance charges are applied to this charge and all other outstanding balance, and every 30 days thereafter (July15, Aug15, etc...)

7) Net 60th - Payment of new credit is due within 60 days of the 1st day of the month following the month the credit is given.

*example: Charge made on May 5, statement provided June 1. If paid by Aug 1, no finance charges. On Aug 1 finance charges are applied to this charge and all other outstanding balance from before June 1, and also every 30 days thereafter (Aug1, Sep1, etc...)

8) Net 10th, 2% on Partial - Same as net 10th, but 2% discount given on all ROA toward this charge before 10th (not just if paid in full) **(discount applied on 11:59PM on the 10th, NOT at the time the ROA is posted).**

9) Net 10th, 2% on Net 30th - **Account has Net 30th terms, but would receive a 2% discount if they pay by the 10th. 2% discount is applied based on the amount due by the 10th, if that amount has been paid in full. Discount is applied to the account on the 10th at 11:59 PM if the previous balance has been paid in full. Payment of new credit is due by 11:59PM on the last day of the month, which could be 28-31 days following the month the credit is given.**

***example: Charge made on May 5, statement provided June 1. If paid by June 30, no finance charges. On July 1 finance charges are applied to this charge and all other outstanding balance from before June1, and every end-of month thereafter.**

10) Net 1 - **Finance charges begin immediately on any statement balance. Charge made on May 5, is due on May 6. Finance charge applied 11:59PM on the 6th, and everyday thereafter. Statements would be ran/generated daily in the morning of May 6th, and are due in full that day of May 6.**

Statement Sequence – On the accounts printed account statements, do you want sales orders listed by date or by invoice number?

Invoice/Statement Terms Name - If you would like your accounts to see a different term than you have selected in the 'Terms' field above, then enter what you want to display on their Invoices and Statements here.

Statement Frequency - Select how often this account will be sent a statement. **Selecting 26-25 will cause the start date to always be the 25th, and the end date to always be the 26th.**

Reprint all invoices along with statement batch -This new setting is designed to allow you to select certain accounts that you would like to reprint invoices for when you run batch statements. A new field has been added in account records to enable this option. The new field is called 'Reprint all invoices along with statement batch'. This field has three options to choose from: No, Reprint all invoices with

statements, and Reprint credits with statements.

The default is set to 'No', so unless you make changes to this setting everything will work normally and you won't see any changes.

If an account has 'Reprint Invoices along with the statement' option set to 'Reprint all invoices with statements', and if that account has at least one Invoice in the given date range for the statement, then the account will appear in the 'Reprint Invoices' bottom section of the Batch statement.

If an account has 'Reprint Invoices along with the statement' option set to 'Reprint credits with statements', and if that account has at least one Credit Invoice in the given date range for the statement, then the account will appear in the 'Reprint Invoices' bottom section of the Batch statement.

Any accounts found in the Reprint Invoices bottom section of the Batch statement will have a 'Reprint Invoices' button to the right of the account name. Click on the button to reprint the invoices for that account from the time frame selected for the statement.

Prorated Returns (Custom Selection) - “None” is the only option unless you add more options in Custom Settings > Pro -rating Return Terms. If you add a rule in custom settings it will be available on the account records. You can set up breakpoints in days and percentages for restocking fees on prorated returns.

Relationship (Parent/Child/Regular) - This is where you designate an accounts Parent/Child relationship. Set to “Regular” to make it a stand-alone account.

Parent Account (Optional) - If this account is designated as a child account in the “Relationship” field in the account file, this field indicates the Parent account. If this is not a child account, this field is not used.

Lockout (Yes/No/Password) - Set this field to place a lockout on the account. Selecting “No” means that the account is unlocked (this is the normal setting). Selecting “Yes” means the account is unconditionally locked and creating a sales order for it is impossible. “Password” means the account is locked, but a Fuse5 user who has been authorized to access password-locked accounts can still create a sales order by entering their Fuse username and password.

Lockout-Password Level (Optional) - This field is used when any of the account lockout options are set to Password. It indicates the user roles (which contain the specific users) who can use their Fuse5 system password to override the lockout.

Past Due Lockout - This setting indicates how long overdue you are going to tolerate an outstanding balance before you lockout the account.

Stop Over Credit Limit (Yes/No/Password) - This setting indicates what to do when the account exceeds the credit limit indicated in the Credit Limit field of the account file. See “Lockout” for description of how the lockout logic works.

Credit Limit (Optional) - Dollar amount that the account is allowed to purchase on store credit. If this is blank, it is assumed to be zero.

Finance Charge (Yes/No/Manual) - Indicates whether or not you will be charging this account finance charges.

If you select Manual: If you hit Apply Finance Charge Now in the account record, finance charges will immediately be applied to the account. If it is hit from the statements page, it will ONLY do it for accounts that have this field set to manual.

When this button is hit from the Account Statements module, Fuse5 will check all accounts with this field set to manual, then sum all past-due \$ amount, *(finance charge/12), and create a finance charge adjustment that will post at that day/time.

For these accounts of course, then they will NOT apply to the finance charge = yes, which receives the auto-cron finance charge based on terms.

Annual Finance Charge Percentage (Optional) - An absolute percentage that is applied to account

balances that exceed the terms defined in the Terms setting.

Minimum Finance Charge (Optional) - Minimum dollar amount finance charge that will supersede the percentage charge, if it is more.

High Credit (Informational) - Highest amount their credit has ever been extended.

Current (Informational) - Sum of charges less than 30 days past due.

1 Billing Cycle Past Due (Informational) - Sum of charges for 1 billing cycle past due.

2 Billing Cycle Past Due (Informational) - Sum of charges for 2 billing cycles past due.

3 Billing Cycle Past Due (Informational) - Sum of charges for 3 billing cycles past due.

More than 3 Billing Cycle Past Due (Informational) - Sum of charges more than 3 billing cycles past due.

Deferred (Optional) - A credit amount for the account that you are going to defer for a customer (for example, for a disputed amount). The account debt total is decreased by this amount, until you change it.

Todays SO Totals (Informational) - Total amount of Sales Orders created today for this account.

Display Total Owed on Invoice (Yes/No) - Selecting "Yes" will print the value from the "Total Owed" field in the account file on the sales invoice.

Total Owed (Informational) - The total outstanding balance on the account.

Total Deposits - A View All Deposits link has now been added to the Account Record view to allow you to view all the deposits on an account. The link is found to the right of the Total Deposits field on the right-hand side of the Custom Information section of an account record. Prior to now the only way to view all deposits was to click on the Deposit button at POS and then hit the View All Deposits button in the deposit window.

Last Payment Date (Informational) - Last time this account had an ROA (Received on Account) payment.

Sales Last 12 (Informational) - Sum of Sales Orders created for this account over the past 12 months.

Returns Last 12 (Informational) - Sum of Returns created for this account over the past 12 months.

Sales Defect Rate (%) - Return % of total purchases in last 12 months

Last Order Date (Informational) - Last time this account bought something.

Last Payment Amount (Informational) - Amount of last payment.

Acceptable Payment Types (Cash, Check, CC, Charge) - During a Sales Order, only the payment types indicated here will be allowed for this account. Hold down the <ctrl> key while clicking on items in this list to make multiple selections.

Default Payment Method (Selection) - The payment method indicated here is highlighted in orange when you are creating the Sales Order. Note About COD as Default Payment Method: If an account has the default payment method set to COD, it will be the only payment button option while finalizing a new sales order. THEN when you go to "OPEN COD" and open that pending COD, you will see all "acceptable payment methods" set for that account.

Documentation Preference (Selection list) - This indicates the documentation that will be generated when a Sales Order is completed. This list contains both hard copy and email options for Invoice, Pick Ticket, and Packing Slip documentation. Hold down the <ctrl> key while clicking on items in this list to make multiple selections. The number of copies printed of each selection depends on the "Auto Print Copies" setting in the Company Locations Settings.

Default Company Profile - within the company location settings you can set "Alternate Company Profiles" that allow you as one business to use separate business addresses and logos for different accounts. Essentially, it allows you to Do Business As (DBA) with some accounts that is different than your standard company name. If you have set up any alternate company profiles it is here, within the account record that you would select an alternate profile for an account. This allows you to put different business information on quotes, CODs, pick tickets, packing slips and account statements.

Invoice Style - This is only used for businesses that have requested more than one invoice style (not

Fuse5 Training Materials

including just a part and shop invoice). If you have multiple invoice styles, this setting let's you determine which this customer will have.

Supplier ID – used for EDI connections

Nexpart Username (Optional) - Used to log this account into the Nexpart e-commerce catalog site, if applicable.

Nexpart Password (Optional) - Password used to log this account into the Nexpart e-commerce catalog site, if applicable.

The Nexpart Username and Password here are for using the Nexpart CATALOG within point of sale. If the Nexpart catalog is turned on in custom settings, and the account has a Nexpart username and password, Fuse5 will be able to access their Nexpart catalog.

These settings have nothing to do with users logging into Nexpart directly and placing orders that show up in Fuse5 as web orders. For that to work, you just have to make sure the account number set up in Nexpart (by you) matches the Fuse5 account number. This assumes the proper steps have been taken by Nexpart to set up their system to talk to Fuse5 for your customers. This is done once for your Fuse5 instance and should work automatically after that for all of your Nexpart accounts. Contact Fuse5 to set this up if you want your customers to be able to see your stock, pricing, and place orders from their Nexpart accounts.

Catalog Supplier – Select supplier for catalog

Notes (Optional) - This is an open field for anything you want to put here.

Ford Customer Type (Optional) - Used for customers who participate in the Ford rebate program. Ford supplies this number to the parts store for each customer that participates.

Rebate Tracker Customer Type – Used for customers that participate in a vendor rebate program. The vendor would supply this number for each customer that is eligible for a rebate. This number will be displayed on the rebate tracker reports.

Rebate Tracker Customer Type2 -Used for customers that participate in a vendor rebate program. The vendor would supply this number for each customer that is eligible for a rebate. This number will be displayed on the rebate tracker reports.

AC Delco PSC Code -Used for customers that participate in a vendor rebate program. The vendor would supply this number for each customer that is eligible for a rebate. This number will be displayed on the rebate tracker reports.

Sales MTD (Informational) - This is the monetary value of Month to Date sales for this Account.

Sales YTD (Informational) - This is the monetary value of Year to Date sales in for this Account.

Returns MTD (Informational) - This is the monetary value of Month to Date returns for this account.

Returns YTD (Informational) - This is the monetary value of Year to Date returns for this account.

Last Month Returns (Informational) – Shows the \$ amount of returns for the account during the last calendar month.

Last Month Sales (Informational) – Shows the \$ amount of sales (minus returns) for the account during the last calendar month.

YTD Comparison (Informational) - This is a Year to Date comparison in dollars of the account compared to its activity in the prior year.

Default SO Markup/Discount % (Optional) - A default discount given on every Sales Order. This functions the same as if you were to check the “Discount” box on the Create Sales Order screen and type this value in every time this customer ordered something.

Default Discount Type - Selecting an option in this field will result in a Discount button becoming available at the Point of Sale when this Account is selected.

On Invoice - The Discount will be applied on the invoice.

Rebate Check - A prominent 'RC' will display at the Point of Sale.

Related Fields:

Custom Setting - **Show Markup & Discount on SO (Sales Order)** - If this setting is used then only Roles specifically allowed access will have the Once a Day Discount available at the Point of Sale.

Account field - **Discount Frequency** - This field is used to define how many times per day this Discount will be available. This may be of use in restricting your Accounts to a single stock order discount per day with full price being charged for any remaining sales. If this field is left blank then the Discount button will not appear at the Point of Sale.

Account field - **Default SO Markup/Discount %** - This field defines the percentage of the discount. This is the percentage of the discount or a markup depending on whether the number is positive or negative. Positive would be a markup and negative would be a discount.

*Markup/Discount is only applied to original product sell price, NOT cores or shop parts.
A (+) positive number is a markup and (-) negative number is a discount.*

Statement Comment 1 Display Until -If no date is selected, the comment from the previous line will always display when appropriate. You can use this line to select a date that the comment would no longer be displayed by.

Pwct Exceptions – Price w/ Count Exceptions

1 Billing Cycle Statement Comment – Comment to be placed on the accounts monthly account statement if they are behind by 1 Billing Cycle.

2 Billing Cycle Statement Comment - Comment to be placed on the accounts monthly account statement if they are behind by 2 Billing Cycles.

Statement Comment 2 Display Until -If no date is selected, the comment from the previous line will always display when appropriate. You can use this line to select a date that the comment would no longer be displayed by.

EDI Cancel / Backorder - When a web order arrives and you do not have enough quantity available to fill the order at that location, what do you want to do?

Cancel, means to just exclude the parts from the order and create a Sales Order with the parts that you can provide. The unavailable parts are canceled automatically and you never see them. A response is provided to the 3rd party system to this effect if the interface supports it, but we have no control over how that system works (Nexpart, IAP, Turbo Part, etc...)

Backorder, means to put the parts on the Web Order and automatically set them as a backorder on the pending Sales Order. This will prevent them from being printed on the pick ticket, if you are automatically printing pick tickets for web orders. You can change the backorder.

Keep, means to put the parts on the pending Web Order and allow the counter person who opens it to handle what happens with these parts.

You may want to coordinate the handling of out of stock orders with your B-B site that generates the web orders. Nexpart, for example, has a setting on the account that allows customers to backorder or not. Unfortunately, they do not do a final QtyOnHand check before placing an order. They only check when the part is added to the order during creation. So, it is possible that an order for a part can still come in that was sold while the Nexpart order was being created, even though Nexpart is set otherwise.

3 Billing Cycle Statement Comment - Comment to be placed on the accounts monthly account

statement if they are behind by 3 Billing Cycles.

Statement Comment 3 Display Until -If no date is selected, the comment from the previous line will always display when appropriate. You can use this line to select a date that the comment would no longer be displayed by.

3+ Billing Cycle Statement Comment -Comment to be placed on the accounts monthly account statement if they are behind by 3or more Billing Cycles.

Statement Comment 3+ Display Until - If no date is selected, the comment from the previous line will always display when appropriate. You can use this line to select a date that the comment would no longer be displayed by.

Vehicle Information – Choose to Print on Invoice or Display in Sales Order only

Store Hours – Store hours of the account, if applicable.

Print Store Hours – Store hours, if entered in line above, will display on sales orders in the Ship To section.

Default SO General Comment – This comment will be displayed on every Quote, COD, and finalized Sales Order invoice for this particular account.

SO General Comment Display Until – When left blank, the Default SO General Comment from the previous line will always print on Quote's, CODs and finalized Sales Order Invoices. You can select a date to have them stop using this line. There is a calendar button to the right when you open this line item.

Add Shop Parts (Yes/No) - If set to YES, any SHOP sales order for this account will add SHOP PARTS to the SHOP sales order if you HAVE set up SHOP PARTS in your custom settings. If set to NO, SHOP PARTS will NOT be added to the sales order regardless of the setting in CUSTOM SETTINGS.

Add Misc SO Fee (Yes/No) - 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'.

Product Group Restrictions - Adding Product Group Restrictions to this Account will prevent this Account from being able to purchase any Products in the associated Product Groups.

The check against Product Group Restrictions only takes place when initially adding a Product to the SO.

Product Group Required - Adding a Product Group Required to this Account will prevent this Account from buying Products that lack the specified Product Group(s).

The check against Product Group Required only takes place when initially adding a Product to the SO.

Reseller Permit Expiration Date – This is the date that you would start taxing customers or request a new permit.

Display Previous Balance - This setting only affects Account Statements with 'A/R Type' = 'Open

Item' & 'Statement Transaction Type' = 'Hybrid OI'.

Summarize previous open items into one line - Account Statements will not display the details of transactions outside of the selected time frame. Instead, a 'Previous Balance' will be displayed on the Account Statement summarizing all previous transactions.

Show previous open item detail - Account Statements will display all Open transactions.

Show Last Statement Balance date and total - Account Statements will display last archived statement end date and total owed

Display Payment Detail -This setting only affects Account Statements with 'A/R Type' = 'Open Item' & 'Statement Transaction Type' = 'Hybrid OI'.

Yes - Account Statements will display the details of which transactions an ROA has been applied against.

No - Account Statements will display the ROA but not include details of which transactions the ROA was applied against.

Account Statement Address Source - Which address would you like to display on Account Statements? The address listed in the main Company Details page or the address associated with Account Default Location?

QB Profile Setting -Typically will be set to Company QB Settings

Default SO Shop or Parts - If set to YES, any sales order created for this account will be a SHOP sales order if you have set up to be a SHOP in CUSTOM SETTINGS. If set to NO, any sales order created for this account will be a PARTS SALES ORDER regardless of the setting in CUSTOM SETTINGS.

Discount Frequency -This field is used to define how many times per day this Discount will be available. This may be of use in restricting your Accounts to a single stock order discount per day with full price being charged for any remaining sales. If this field is left blank, then the Discount button will not appear at the Point of Sale.

Related Fields:

Custom Setting - **Show Markup & Discount on SO (Sales Order)** - If this setting is used then only Roles specifically allowed access will have the Once a Day Discount available at the Point of Sale.

Account field - **Default Discount Type** - Selecting an option in this field will result in a Discount button becoming available at the Point of Sale when this Account is selected. Use 'On Invoice' to include the discount immediately on the invoice.

Apply Credits to Related SO – (Yes/No) – When set to Yes, when doing a return sales order, you will be able to not only select a related sales order, but “apply” the credit to that sales order (Specific to Open Item accounting)

Apply Credits to Oldest SO -(Yes/No) – When set to Yes, when doing a return sales order, you will be able automatically apply the return to the oldest sales order the account has on record. (Specific to Open Item accounting)

Total Owed Column In Statement-Amount remaining field SHOW/HIDE when generating account statements.

Applied Amount Column In Statement – Applied amount field SHOW/HIDE when generating account statements.

Display Total Owed On ROA Receipt (Yes/No) – When this setting is set to ‘Yes’, the Account’s Total Owed will be printed on ROA receipts.

Email Credit Invoices Only - When this option is set to Yes, only Sales Order invoices with a Credit will be sent to the chosen email address. Sales Orders invoices with a balance due will not be emailed. Note: for this setting to work there must also be an email address set for the Account and Documentation Preference must include Email Invoice - HTML or Email Invoice - PDF.

Shipping Mark Up - Use this setting if you would like to increase the Sell Price of shipping (Shipping label) on sales orders. You can choose to either add a direct price increase, or add a percentage increase based on the cost of the shipment. Enter the value for the discount in the 'Shipping Mark Up Amount' field.

Shipping Mark Up Amount - Use this setting if you would like to increase the Sell Price of shipping (Shipping label) on sales orders. You can choose to either add a direct price increase, or add a percentage increase based on the cost of the shipment. Enter the value for the discount in the 'Shipping Mark Up Amount' field.

Contact Information – Click directly on “Contact Information” field name to open a new tab with the Contacts listing page and the selected contact already searched. Click the “+” button to add a contact to the account.

Repair Facility ID – Repair Facility ID mapping for CCC mapping

COD Payment Methods on Printed COD Invoice - Do you want to restrict what payment types are accepted for COD payment? Select the acceptable payment methods from the Selection.

Custom Statement Terms - Users may need the option to have printed 'Account Statements' display different 'Terms' than the 'Terms' set in the 'Account' record. The account statement is a way to communicate the negotiated account terms with the customer. Certain methods of applying discounts and finance charges, like manually applying them, do not communicate the necessary information to their account holders.

1. If this field, 'Custom Statement Terms', is left blank the 'Account Statement' 'Terms' should display the value from the 'Account' field 'Terms'.
2. If this field, 'Custom Statement Terms', contains any data then it should populate into the 'Terms' displayed on the 'Account Statement'.

Federated Catalog Account – Enter the Account’s Federated Catalog Account ID here to grant access to the Federated Catalog on the B2B site.

Allow Sales and Returns on the same SO (Yes/No) - Does this Account holder have a policy against mixing Sales and Returns on the same Sales Order? If so, change this setting to No and Counter People will no longer be able to mix transactions for this Account.

Note: If this is your company policy (instead of your customer's policy) then you should address that with the Custom Setting Combined Sales & Returns on Sales Order Restriction.

MAP IT button – allows you to access either billing or shipping address in Google Maps for the account.

Additional Info at Bottom of Account Record (labels with the drop down arrows to the right) – These are for the most part self-explanatory. You will have access to a record of multiple types of interactions with the particular account by using the drop down arrows. Included is the following:

1. **Default Address Information** – Default address information for the account.

Address Information			
Billing Address	PO BOX 159 1	Shipping Address	
Billing Address 2		Shipping Address 2	
Billing City	WHITE OAK	Shipping City	
Billing State	NC	Shipping State	
Billing County		Shipping County	
Billing Country		Shipping Country	
Billing Postal Code	28399	Shipping Postal Code	
General Account Notes			

2. Special Notes – special notes regarding the account.

Special Notes	
Special Notes	Credit Card Number: Expiry Date: Card Type: Name On Card: CCZip: 28399
	Print On Pick Ticket yes

3. Front End Integration – These settings are made available by the Fuse5 administrator when a the B2B front end website is enabled. The settings determine which accounts have access to ordering online, catalog access and locations they can order from.

Front End Integration	
Allow B2B Access	B2B Password
B2B Catalog Access	B2B Order Locations Allowed
B2B Username	Bora Bora, Fiji, Tahiti, Samoa, Easter Island, Cook Islands, Solomon Islands, French Polynesia

4. Account Addresses - A single account can have more than one shipping and billing address. These will be available from the Point of Sale if you must ship or bill to a different address. You have the ability to designate which is the default account with the icon under the action column.

Account Addresses									
Import Account Addresses Export Account Addresses Add Address									
Showing 1 - 2 of 2									
Address Type	Address	Address 2	City	State	ZIP Code	Country	Country	Is Default	Action
Billing Address	1340 ROSEWOOD DRIVE		COLUMBIA	SC	29201		USA	Yes	
Shipping Address	1340 ROSEWOOD DRIVE		COLUMBIA	SC	29201		USA	Yes	





5. Account Part Numbers - 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.

Fuse5 Training Materials

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 affect 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.

- Auto Shop Info** – All the details of the Account's Autos can be found in this section. The service history, mileage, recommended services, and vehicle specs.

Auto Shop Info					Maintenance
Auto info	VIN#	Unit #	License Plate	Action	
2011,CHEVROLET TRUCK,SILVERADO 1500 PU,V8-325 5.3L					
2011,CHEVROLET TRUCK,SILVERADO 1500 PU,V8-325 5.3L, 1gorkae31be426455	1gorkae31be426455			  	

- Outstanding Core Quantity Log** – Core's that the account has purchased and has not returned.

Core Quantity Log						
Core Qty	Core Price	Sale SO #	Return SO #(s)	Line Code	Product Number	Date
1	\$ 12.00	S2-131069	-	RAY	PGD699C	2012-11-15 08:32:14
100	\$ 12.00	S2-131067	-	RAY	PGD699C	2012-11-15 08:26:35

- Consignment Log** – Shows consignment activity you have had with the account.

Consignments Log						
Trans code	Ship Qty	Sell Price	Core Price	SO #	Product Name	Line Code
Consignment Distribution	2	\$ 0.00	\$ 0.00	S2-130977	45678	wix
Consignment Sale	1	\$ 6.00	\$ 0.00	S2-130996	45678	wix
Consignment Return	1	\$ 0.00	\$ 0.00	S2-131000	45678	wix

- Warranty Quantity Log** – Shows products the account has done a warranty return on.

Warranty Quantity Log					
Unresolved Warranty Qty	Sell Price	Core Price	SO #	Product Name	Line Code
2	\$ 10.00	\$ 0.00	S2-131047	wix	45678

- Pending Sales Order List** – List of pending sales to the account and includes search functionality

Pending Sales Order List							
Showing 1 - 10 of 27		Search for : <input type="text"/>		In <input type="text" value="Order Number"/>	<input type="button" value="Search Now"/>	<input type="button" value="Show ALL"/>	
OrderNo	Account Name	Total	Counter Person	WebOrder	Paid	Action	Date
BB13131942	ROBERT T SUGGS JR.	\$0.00	admin	No	No	Edit	2013-02-21 07:57:33
BB13131940	ROBERT T SUGGS JR.	\$596.99	admin	No	No	Edit	2013-02-21 07:53:55
BB13131933	ROBERT T SUGGS JR.	\$121.52	admin	No	No	Edit	2013-02-20 13:08:55
BB13131929	ROBERT T SUGGS JR.	\$528.75	admin	No	No	Edit	2013-02-20 12:58:41
S1-131864	ROBERT T SUGGS JR.	\$15.76	admin	No	No	Edit	2013-02-18 10:33:23
S1-131863	ROBERT T SUGGS JR.	\$138.61	admin	No	No	Edit	2013-02-18 10:28:33
S1-131798	ROBERT T SUGGS JR.	\$1,005.38	admin	No	No	Edit	2013-02-14 07:41:59
BB13131934	ROBERT T SUGGS JR.	\$32.04	admin	No	No	Edit	2013-02-13 16:24:57
S1-131843	ROBERT T SUGGS JR.	\$26.74	admin	No	No	Edit	2013-02-13 08:41:57
S1-131882	ROBERT T SUGGS JR.	\$5.59	admin	No	No	Edit	2013-02-11 15:48:52

11. Finalized Sales Order List -list of all finalized sales to the account in and includes search functionality

Finalized Sales Order List								
Search for : <input type="text"/> In <input type="text" value="Order Number"/> <input type="button" value="Search Now"/> <input type="button" value="Show All"/>								
Showing 1 - 10 of 130								
SO #	Account Name	Total	Counter Person	Actual Delivery Time	WebOrder	Paid	Action	Date
BB13131939	ROBERT T SUGGS JR.	\$658.80	admin		No	Yes	View	2013-02-28 10:52:15
BB13131902	ROBERT T SUGGS JR.	\$589.99	admin		No	No	View	2013-02-27 07:48:30
2-131383	ROBERT T SUGGS JR.	\$0.00	admin		No		View	2013-02-26 14:33:17
2-131355	ROBERT T SUGGS JR.	\$0.46	admin		No	Yes	View	2013-02-26 13:53:39
BB13131973	ROBERT T SUGGS JR.	\$8.56	admin		No	Yes	View	2013-02-22 11:46:10
2-131376	ROBERT T SUGGS JR.	\$107.08	admin		No	Yes	View	2013-02-22 11:40:48
2-131369	ROBERT T SUGGS JR.	\$2.14	admin		No	Yes	View	2013-02-22 11:38:53
6-131964	ROBERT T SUGGS JR.	\$130.05	Craig		No	Yes	View	2013-02-21 11:48:02
6-131961	ROBERT T SUGGS JR.	\$130.05	Craig		No	Yes	View	2013-02-21 11:45:22
6-131957	ROBERT T SUGGS JR.	\$130.05	Craig		No	Yes	View	2013-02-21 11:43:07

12. **Related Docs** - Within Product Information pages as well as Account Information pages we have added a new section called 'Related Docs'. This section can be found in the footer (almost the very bottom) of both Product and Account information pages.

In this new section you can now upload documents related to the product or account. Just click on the 'Upload Related Docs' and browse for the file you are going to upload. Documents can be added one at a time and there is an available field to add a description for each document.

Once uploaded, users can then download the docs you have added from any computer logged into Fuse5 with the associated action icon at the far right.

Related Docs

13. **Activities / Calls** – This section displays all Activities and Calls that have taken place or are scheduled in the future. You can also Add contacts to the account through this section.