Role Set Up

Fuse5 allows you to set up a simple Hierarchy tree allowing you to easily manage your different roles and settings for your company within fuse5. Every label and every role can be updated to match your current business hierarchy and naming of each position. Within each role you will select who each person reports to. You will also assign privileges for "create/edit", "edit permissions view", "delete". Edit, select and save any changes before moving on to next user. Once completed you will want to go to "Custom Settings" and turn on/off along with Enable/Disable different settings. You can manage different roles by assigning them rights within the Custom Settings. Go through all fields and select and then >> (add) all roles you would like added for each.

Only users with Admin access can change roles or custom settings.

Fuse5 provides default roles that have been established based on prior interactions with automotive industry organizations. You can use these roles as they are, change their names, or change permissions within each to fit your needs.

Go through Personal & Admin > Settings: Roles is an option at the top middle of the page.

You can create a role with the orange + button at the top right of the page.

You can EDIT PERMISSIONS to allow users to "create/edit", "view", or "delete" up to nearly 70 categories:

Recommendation is that you start with the default settings in place for each role. As training progresses you will get a better sense of what each of the role settings is for and can make decisions about permissions based on how your organization operates.

There are several modules that have the capability of further limiting the amount of information seen by role. They include Accounts, Products, Vendors, and Sales Orders. Using the drop down arrow under FIELDS & TOOLS SETTINGS you can select and deselect line items withing that record that the chosen role is allowed to interact with.

The mandatory fields are as follows:
Accounts: Account Number & Account Name
Products: Product Number, Product Stripped, Subline, Line Code, & Product Name
Vendors: Vendor Number, Vendor Name, Vendor Line Code
Sales Orders: Account Name, Sales Order No, Account Number.

- *Each of the categories below provide a brief description of the module within Fuse5 that is affected by the setting.*

15. Delivery Log – DELIVERIES > DELIVERY LOG. This setting allows you to decide if the role has the ability to look at the delivery log which allows you to see a variety of information regarding the status of sales orders pushed to the delivery module. Used in conjunction with the PENDING DELIVIES role below, you can completely eliminate the delivery module from Fuse5 if you turn both role settings off.

16. Sell Price – IGNITE YOUR MARGIN > PRICING PLANS > SELL PRICE PLANS. Sell price plans are the basic building block of the pricing strategy. Each customer should be assigned to a sell price plan. This role setting can be used to limit the users ability to view, edit, or delete sell price plans. It does NOT affect their ability to see the sell price or change it at the point of sale.

17. Sell Price Rules –   IGNITE YOUR MARGIN > PRICING PLANS > SELL PRICE PLANS. Sell price plans are the basic building block of the pricing strategy. Each customer should be assigned to a sell price plan. This role setting can be used to limit the users ability to view, edit, or delete sell price plans. It does NOT affect their ability to see the sell price or change it at the point of sale.

18. Exceptions to the Plans - IGNITE YOUR MARGIN > PRICING PLANS > EXCEPTIONS TO THE PLANS. Exceptions can be created to provide discounts on specific products to specific customers. This role setting can be used to limit the users ability to view, edit, or delete exceptions to the price plans.

19. Account Exceptions Rules – IGNITE YOUR MARGIN > PRICING PLANS > EXCEPTIONS TO THE PLANS. Exceptions can be created to provide discounts on specific products to specific customers. This role setting can be used to limit the users ability to view, edit, or delete exceptions to the price plans.

20. Sales & Promotions -IGNITE YOUR MARGIN > PRICING PLANS > SALES & PROMOTIONS. Sales & promotions can be created for time specific or quantity specific discounts. This role setting can be used to limit the users ability to view, edit, or delete sales & promotions.

21. Sales & Promotions Rules - IGNITE YOUR MARGIN > PRICING PLANS > SALES & PROMOTIONS. Sales & promotions can be created for time specific or quantity specific discounts. This role setting can be used to limit the users ability to view, edit, or delete sales & promotions.

22. Pricing Plans – By turning off the ability to view the role will not be able to see any price plans.

23. List Price -IGNITE YOUR MARGIN > PRICING PLANS > LIST PRICE. This role setting can be used to limit the users ability to view, edit, or delete list price plans.

24. List Price Rules – IGNITE YOUR MARGIN > PRICING PLANS > LIST PRICE. This role setting can be used to limit the users ability to view, edit, or delete list price plans.

25. Customer Backorder Log – SALES MANAGEMENT > CUSTOMER BACKORDER LOG. Turning off create, edit, and delete capability takes away the roles ability to change owners and delete sales orders from the Customer Backorder Log. If the user has view capability he/she can still handle finalizing sales for parts that were on backorder and can still "De-Allocate" parts if you want them to be pulled off the Customer Backorder Log.

26. Products Received – PRODUCT MANAGEMENT > PRODUCTS RECEIVED. When you receive parts that you ordered from a vendor on a purchase order in Fuse5, those parts will be listed on the products received listings page. When view capability it turned off the role will have no access to the Products Received module. Although there are options for create/edit, view, and delete, this module is a view only module.

27. Sales Line Items – DATA TOOLS > SALES LINE ITEMS. The sales line items listings page can be used to do research on individual parts that have been sold from within Fuse5. One of the most common uses is to do a search for a specific account and specific part to determine the last time a customer bought something from you. When view capability it turned off the role will have no access to this module. Although there are options for create/edit, view, and delete, this module is a view only module.

28. Sales History – DATA TOOLS > SALES HISTORY. The sales history listings page is another tool that can be used to look at sales data. It provides slightly different options for searching than the sales line item listings page. Searchable sales history data in this module includes line code, product number, false loss, location, lost sales, return quantity, sell quantity, total activity, transfer in quantity, transfer out quantity, week, year. This listings page can be helpful to get an overview of activity of a part on a by week basis. When view capability it turned off the role will have no access to this module. Although there are options for create/edit, view, and delete, this module is a view only module.

29. Sales Order Advertisements – POINT OF SALE > SALES ORDER ADVERTISEMENTS. Sales order advertisements can be created in Fuse5 and you can choose to have them show up at the bottom of sales order invoices providing your customers with information about sales and promotions you might be running. When view capability it turned off the role will have no access to this module. If create, edit, and delete is turned off then role can only view the sales order advertisements.

30. Vendor Invoice Reconciliation List - PRODUCT MANAGEMENT > VENDOR INVOICE RECONCILIATION LIST. After you have received products from a purchase order, you will get an invoice from your vendor / supplier requesting payment. The process of confirming that what you are being billed for is what you actually received is called Vendor Invoice Reconciliation. When view capability it turned off the role will have no access to this module. The create option determines if the role has the ability to create a new vendor invoice reconciliation within Fuse5.

31. Sales Rank – This is referencing sales ranks which are stored in product records.

32. Purchase History – DATA TOOLS > PURCHASE HISTORY. The purchase history listings page is another tool that can be used to look at purchasing data. It provides slightly different options for searching than the purchase line item listings page. Searchable purchase history data in this module includes line code, product number, buy quantity, return quantity, total activieyt, week, year, and location. This listings page can be helpful to get an overview of activity of a part on a by week basis. s When view capability it turned off the role will have no access to this module. Although there are options for create/edit, view, and delete, this module is a view only module.

33. Vendor Invoice – PRODUCT MANAGEMENT > VENDORS > VENDOR INVOICES. When view capability it turned off the role will have no access to this module. The create option determines if the role has the ability to create a new vendor invoice within Fuse5. Vendor invoices can be created /

imported into Fuse5 prior to doing your reconciliation if you have an electronic copy (CSV file / spreadsheet) of your invoice. Delete authority gives the role the ability to delete previously imported invoices. Once the invoices are used for a Vendor Invoice Reconciliation they are really in Fuse5 for tracking purposes. They do not need to be deleted, but can be if you don't want to see list of previously imported / created invoices.

34. Order Delay List - PRODUCT MANAGEMENT > ORDER DELAY LIST. Order delays can be created for products that will delay them from showing up on either order point purchase orders or forecast purchase orders. This delay can be set if you have slow moving parts with a high return rate that you would not want to immediately re-order when eligible. For example, you may have a slow mover with an order point of 1. You just sold it yesterday. If you have an order delay set of 30 days, the part will not show up on a PO for 30 days after it was eligible for reorder. That way if the part is returned during the 30 days, you won't need to reorder it. When view capability it turned off the role will have no access to this module. Taking away delete access stops the role from being able to delete Order Delays and taking away create/edit capability stops the role from creating or editing order delays.

35. Vehicle Expense – DELIVERIES > VEHICLE EXPENSE. As part of the delivery module, you can track vehicle expenses in Fuse5. This is primarily just used as a tracking mechanism within the delivery module. When view capability it turned off the role will have no access to this module.

36. Commission Rules -when turned off the role can't choose a user or look at the CRRs

37. Purchase Line Items – DATA TOOLS > PURCHASE LINE ITEMS. The purchase line items listings page can be used to do research on individual parts that have been purchased on purchase orders from within Fuse5.When view capability it turned off the role will have no access to this module. Although there are options for create/edit, view, and delete, this module is a view only module.

38. Eligible Returns – DATA TOOLS>ELIGIBLE RETURNS. This module allow you to search for products that are eligible to be returned.

39. Pending Deliveries – DELIVERIES > PENDING DELIVERIES / ASSIGNED DELIVERIES. This setting allows you to decide if the role has the ability to look at the pending and assigned deliveries in the Fuse5 delivery module. If you are using the delivery module you will choose specific delivery methods (truck, your truck, delivery, etc). When you complete a sales order using one of those delivery methods the sales order will be pushed to PENDING DELIVERIES. At this point you would assign the delivery to one of the users you have set up as a driver in user settings (PERSONAL & ADMIN > SETTINGS > USERS > choose the user > turn ON the option for DELIVERY MODULE USER. When used in conjunction with the DELIVERY LOG role setting above, you can completely eliminate the delivery module from Fuse5 if you turn both role settings off.

40. Commissions – PERSONAL & ADMIN >

41. Store Transfers – PRODUCT MANAGEMENT > STORE TRANSFERS. The store transfer module in Fuse5 allows you to transfer parts among your various locations (if you have more than one). When view capability is turned off the role will have no access to this module. Edit, Delete, and Create capability exists in this module and can be edited by role.

42. Rebate Tracker – IGNITE YOUR MARGIN > REBATE TRACKER. The rebate tracker can be used to set up rebates that your receive from your vendors. You can create a rebate tracker and run it when appropriate to provide your vendor with appropriate sales data. Edit, Delete, and Create capability exists in this module and can be edited by role.

43. Pricecode Books – IGNITE YOUR MARGIN > PRICECODE BOOKS. The pricecode book module allows you to create price plans with different levels based off of the parts cost. For example, if you want to do a mark up of 30% on parts that cost you less than $10, and a markup of 28% for part that cost you more than $10, this is where you would set up the framework for that pricing. When view capability it turned off the role will have no access to this module. Edit, Delete, and Create capability exists in this module and can be edited by role.

44. Product to PCB - IGNITE YOUR MARGIN > PRICECODE BOOKS > PRODUCT TO PCB. If you have created a pricecode book, the product to PCB module is where you would determine which line codes you want to go into the pricecode book. When view capability it turned off the role will have no access to this module. Edit, Delete, and Create capability exists in this module and can be edited by role.

45. Return Good Number List – - POINT OF SALE>RETURN GOOD NUMBER LIST. This module is a listing page of all the RGN's and the accounts associated with them.

46. Sales Rank Groups – IGNITE YOUR MARGIN>SALES RANK GROUPS. This module provides a listing of all the sales rank groups and their current status in Fuse5.

48. Company Vehicles – DELIVERIES > COMPANY VEHICLES. This module can be used to store information about your companies vehicles or delivery trucks. When view capability it turned off the role will have no access to this module. Edit, Delete, and Create capability exists in this module and can be edited by role.

49. End of Day Reconciliations – POINT OF SALE > END OF DAY RECONCILIATIONS. The end of day reconciliation process is used to count your register and / or verify that you have all the cash, checks, and credit card receipts for all of your sales and receivables for a given time period. It can be done daily, but does not have to. This module can be used to simply verify the financials are matching and can also be used to push the data to a financial software package if you have an integration set up. When view capability it turned off the role will have no access to this module. Edit, Delete, and Create capability exists in this module and can be edited by role.

50. Lost Sales Log - DATA TOOLS>LOST SALE LOG.   This module allows you to view all lost sales in a listing page. You can also reorder products from this page based on the amount of lost sales.

51. TRAINING MATERIALS – PERSONAL & ADMIN > TRAINING MATERIALS.   This module allows you to access training videos and training documents that teach a user how to use Fuse5. When view capability it turned off the role will have no access to this module. There is no create, edit, or delete capability with this module.

52. Sales Groups – SALES MANAGEMENT > SALES GROUPS. Sales groups can be established to group accounts / customers by certain types depending on the nature of your business. These groups can be used to establish pricing, commissions for sales people, and to look at reports by sales group.

For example, you may create a group for all dealerships so you can evaluate sales data for just that group. When view capability it turned off the role will have no access to this module. Edit, Delete, and Create capability exists in this module and can be edited by role.

53. Store Transfer log - DELIVERIES>STORE TRANSFER LOG. This module allows you to see a listing of all the store transfers and their current status.

55. Product Tracker – DATA TOOLS > PRODUCT TRACKER. This module is often used to track inventory changes for a product. You can see changes to a parts inventory and what caused the change. When view capability it turned off the role will have no access to this module. There is no create, edit, or delete capability with this module.

56. Store Transfers Received – PRODUCT MANAGEMENT > STORE TRANSFERS > STORE TRANSFERS RECEIVED. This module allows you to view a list of products received from store transfers to include the line code, part number, qty received, transfer number, receipt number and who received it. When view capability it turned off the role will have no access to this module. ***When create capability is turned off the user will NOT have the ability to receive store transfers.***

57. Low Demand Rules – PRODUCT MANAGEMENT > PURCHASE ORDERS > LOW DEMAND RULES. Low demand rules can be created to ensure that you maintain inventory of parts that are not sold frequently enough for them to populate purchase orders based on sales history if you are using forecasting to create purchase orders. When view capability it turned off the role will have no access to this module. Edit, Delete, and Create capability exists in this module and can be edited by role.

58. Equivalent Parts – PRODUCT MANAGEMENT > PRODUCTS > EQUIVALENT PARTS. Equivalent part relationships can be established among parts. Parts can be equivalent if you buy them from multiple vendors with potentially multiple current costs. The parts may or may not have the same line code and part number. You can establish the relationships in the equivalent part module or from a product record. Equivalent part information is used primarily for doing purchase orders. When view capability it turned off the role will have no access to this module. Edit, Delete, and Create capability exists in this module and can be edited by role.

59. ST Delivery Log – DELIVERIES > ST DELIVERY LOG. This module allows you to view information about the delivery status of store transfers created within your site. When view capability it turned off the role will have no access to this module. There is no create, edit, or delete capability with this module.

60. Quick Edit – PRODUCT MANAGEMENT > PRODUCTS > QUICK EDIT. This listings page can be used to make actual changes to product information without going into individual product records. When view capability it turned off the role will have no access to this module. There is no create, edit, or delete capability with this module.

61. ROA & ADJ – SALES MANAGEMENT > ACCOUNTS > ROA & ADJ. The Received On Account and Adjustment module is used to take payment on charge accounts. This is where you would enter payments, make adjustments, add deferments or create refunds for your charge accounts. When view capability it turned off the role will have no access to this module. There is no create, edit, or delete capability with this module.

62. Promotion Tracker – DATA TOOLS > PROMOTION TRACKER. This module allows you to create promotions that can be assigned to specific accounts.

63. Product Line Code Description - - PRODUCT MANAGEMENT > PRODUCT LINE CODE DESCRIPTIONS. This module allows you to view multiple products' line code descriptions and edit them directly in the listing page.

64. Account Autos – SALES MANAGEMENT > ACCOUNTS AUTO. This module allows you to see vehicles that you have added to accounts either through the account autos listings page or by adding them to a shop sales order. When view capability it turned off the role will have no access to this module. Edit, Delete, and Create capability exists in this module and can be edited by role.

65. Repair – SALES MANAGMENT > REPAIR. When view capability it turned off the role will have no access to this module. Edit, Delete, and Create capability exists in this module and can be edited by role.

66. LIFO Tracker – DATA TOOLS > LIFO TRACKER.   This module allows you to track the LIFO effects of individual products.

67. Sales Targets - DATA TOOLS > LIFO TRACKER. This module allows you to set sales targets based on different target groupings set by the user.

68. Kits - PRODUCT MANAGEMENT > KITS.   This module allows you to group multiple product together for use at the POS.

69. Manufacturing - PRODUCT MANAGEMENT > MANUFACTURING.   This module allows you to combine products in Fuse5 to create another new product.

70. OE# - PRODUCT MANAGEMENT > OE#.   This module allows you add original equipment number associated with individual parts. These number can be looked up at the POS as an alternative to the original product number.

71. Account Statements- SALES MANAGMENT > ACCOUNTS>ACCOUNT STATEMENTS. This module allows users to view and send account statements.

72.   Related Part – PRODUCT MANAGEMENT > RELATED PART.   This module allows you to view and assigne related parts to products.

73. Vendor Invoice Summary – PRODUCT MANAGEMENT > VENDORS>VENDOR INVOICE SUMMARY. This module provides a listing of the vendor invoices and their status in Fuse5.

74. Catalog Part Cross Reference – PRODUCT MANAGEMENT > PRODUCTS>CATALOG PART CROSS REFERENCE. This module allows you to cross reference products that have different catalog part numbers from Fuse5

75. Accounting – DATA TOOLS>ACCOUNTING. This module provides a detailed listing of accounting transactions.

76. Product Mass Add – PRODUCT MANAGEMENT > PRODUCTS>PRODUCTS MASS ADD.
This module allows you to quickly add many products to Fuse5 through manual entry.