TQS Technologies Inc.

TQS Fusion 2

Version 1.7

Quick Start Guide

Rev. 5 | January 2017

Contents

Legal Information

Getting Started

Getting started with Fusion 2 is simple. Access www.tqsfusion.com and enter your username and password.

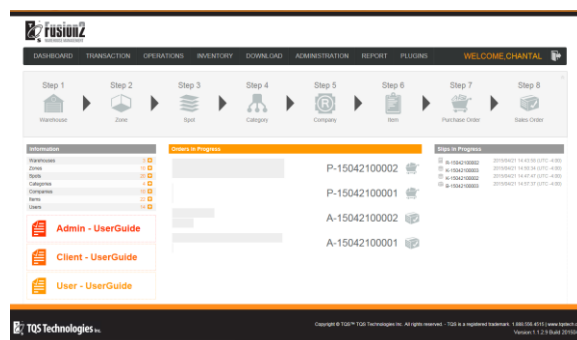First time users need to sign up for an account.
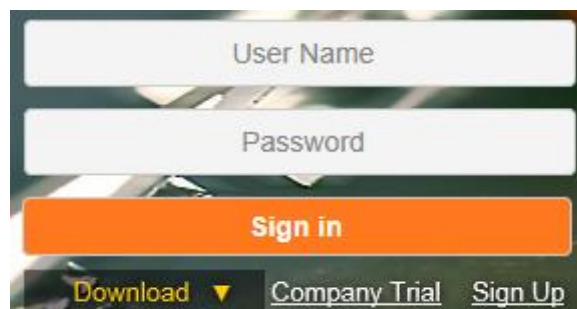
Dashboard

The Dashboard is the first page you see when you log into Fusion 2. Warehouse Information, In Progress Orders, and In Progress Slips can all be viewed from the Dashboard.

The full User Manual can be downloaded from the Dashboard.

Information Panel

The information pane gives a snap shot of pertinent information regarding your operations.

In Progress Orders

All orders in progress, Sales and Purchase that were created in the last seven days, appear in this list.

Each order has a percentage next to it indicating completeness and an icon designating the type of order.

In Progress Slips

All slips in progress, receipt, pick, pack and move, appear in this list. Each type of slip has a designated icon to indicate which type of slip.
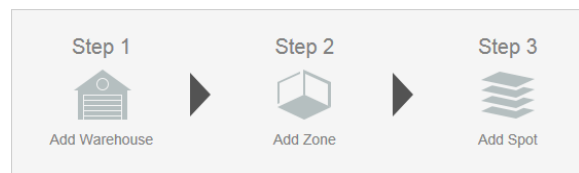

Setting up a Warehouse

Follow steps 1 through 6 from the Dashboard to set up your warehouse.

Click on the icon of the task you want to perform.

Note: Steps need to be completed in order. A warehouse must be added before a zone is added, but a warehouse doesn't need to be added every time a zone is.
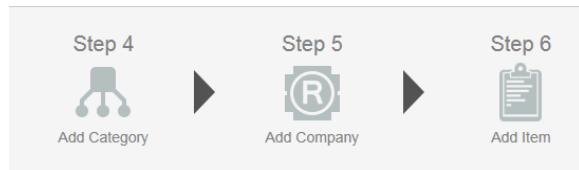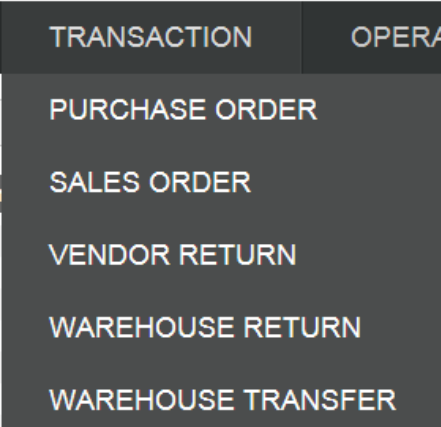
Transactions

Transactions include any orders, returns, kits, and transfers.

Mouseover Transactions and click your selection to view a list.

Each Transaction page will have a list of all current transactions, organized by most recent. The icons on the right of the list indicate which options are available to you. See Symbols.

	Order Number		Vendor	Billing Address	Contact	Status	Date Created	Receipt Rate	
▶	P-14083000002		TVend	76 N Street, Edmonton	Contact	Filled	2014/08/29 23:03:47 (U...	100%	
▶	P-14082800006		PVendor (Pate test vend...	ac,ac,ca,Canada	pate	Filled	2014/08/28 05:05:19 (U...	100%	
▶	P-14082800005		TVend	76 N Street, Edmonton	Contact	Outstanding	2014/08/28 02:20:44 (U...	62.5%	
▶	P-14082800003		TVend	76 N Street, Edmonton	Contact	Outstanding	2014/08/28 01:36:24 (U...	25%	
▶	P-14082700005		KV005 (ken test vendor...	fdsa,fdsa,fdsa,Canada	fdsa	Filled	2014/08/27 04:29:13 (U...	100%	
▶	P-14082700004		TVend	76 N Street, Edmonton	Contact	Filled	2014/08/26 10:32:00 (U...	100%	
▶	P-14082700001		KV002 (knnethtest vend...	fdsa,dsa,fdsa,Canada	fds	Filled	2014/08/26 23:54:23 (U...	100%	
▶	P-14082600002		TVend	76 N Street, Edmonton	Contact	Filled	2014/08/25 23:21:15 (U...	50%	
▶	P-14082600001		TVend	76 N Street, Edmonton	Contact	Filled	2014/08/25 23:08:36 (U...	100%	
▶	P-14082500012		TVend 2	35 Broad St, Toronto	Contact	Filled	2014/08/25 11:18:38 (U...	100%	
▶	P-14082500006		TVend	76 N Street, Edmonton	Contact	Filled	2014/08/25 04:23:53 (U...	100%	
▶	P-14082500005		Company 1 (Test compa...	123 Fort,Hamilton,ON,C...	Conrad Tactman	Outstanding	2014/08/25 02:18:53 (U...	0%	
	P-14082500003		TVend	76 N Street, Edmonton	Contact	Outstanding	2014/08/24 23:51:38 (U...	0%	
	P-14082200015		TVend 2	35 Broad St, Toronto	Contact	Outstanding	2014/08/22 14:41:57 (U...	0%	
▶	P-14082200014		TVend 2	35 Broad St, Toronto	Contact	Filled	2014/08/22 14:41:02 (U...	100%	

1 2 3 4 5 ... 6   Next >>

Transactions are created by clicking the new icon ▦ at the top right of each Transaction page.

Purchase Orders

Purchase Orders are used when purchasing items from a Vendor. Click the new icon on the Purchase Order page to create.

Sales Orders

Sales orders are used when selling items to a dealer. Click the new icon on the Sales Order page to create.

Vendor Return

A Vendor Return is created when an item or items are being returned to a vendor. Click the new icon on the Vendor Return page to create.

Warehouse Return

A Warehouse Return is created when an item or items are returned to your warehouse. Click the new icon on the Warehouse Return page to create.

Warehouse Transfers

To move an item from one warehouse to another, a Warehouse Transfer must be created.
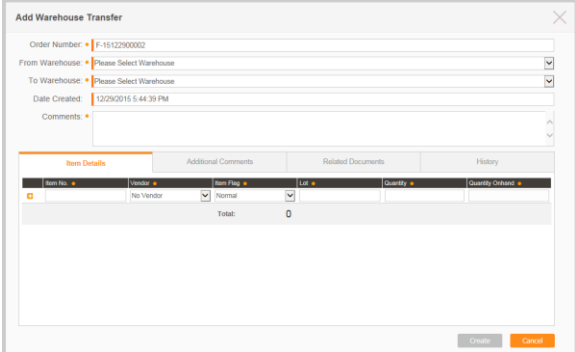
Once a Warehouse Transfer has been created, Pick and Pack slips are created at the origin warehouse and a Receipt slip is created at the destination warehouse.

Operations

Operations include all slips.

Mouseover Operation and click your selection to view a list of those slips.

Each Operation page will have a list of all current slips, organized by most recent. The icons on the right of the list indicate which options are available to you. See Symbols.

Operations are created by clicking the new icon at the top right of each Operation page or using an add icon from a Transaction page.

Receipt Slips

Receipts show which items from a Purchase Order or Warehouse Return that have been received to the warehouse.

Receipt slips are created from the Purchase Order or Warehouse Return pages using the Add Receipt icon or from the Receipt Slip page by page using the New icon .
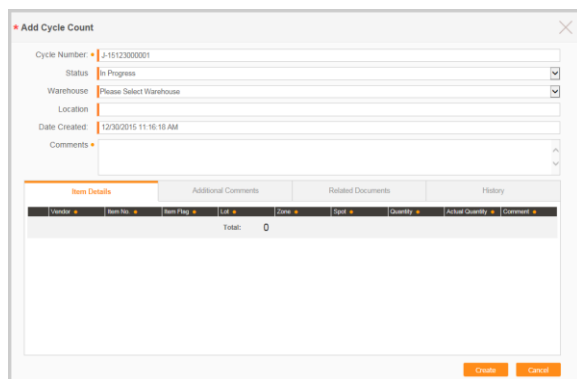
Pick Slips

Pick slips indicate which items need to or have been pulled from the stock of a warehouse from a Sales Order or Vendor Return.

Pick Slips are created from the Sales Order or Vendor Return pages using the Add Pick icon or from the Pick Slip page by using the New icon .

Pack Slips

Pack slips indicate which items need to or have been packed and are ready to ship from a Sales Order or Vendor Return.

Pack slips are created from the Sales Order or Warehouse Return pages using the Add Pack icon or from the Pack Slip page by page using the New icon .
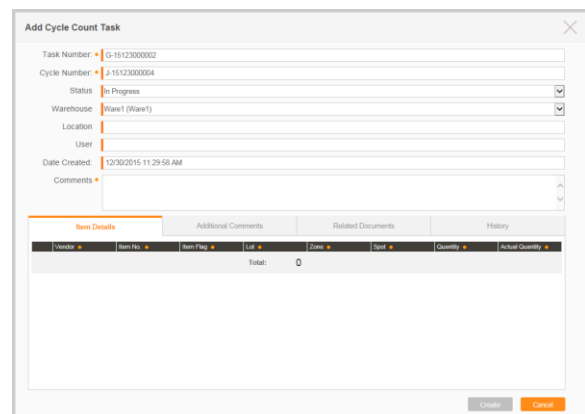
Move Slips

Move slips are used to move items from one zone or spot to another, within the same warehouse.

Move slips are created from the Move Slip page by using the New icon .

Cycle Count

Cycle Count is used to help keep track of your inventory. Add new and manage existing Cycle Counts from the Cycle Count page.
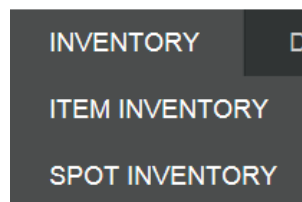

Cycle Count Task

Cycle Count Tasks can be managed through the Cycle Count Task page. Add Cycle Count Tasks to assign the Cycle Count to a worker.
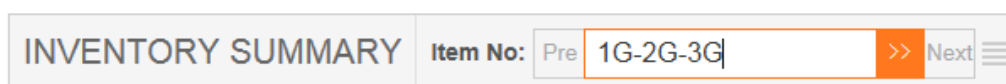
Inventory

Inventory can be viewed by either Item or Spot.

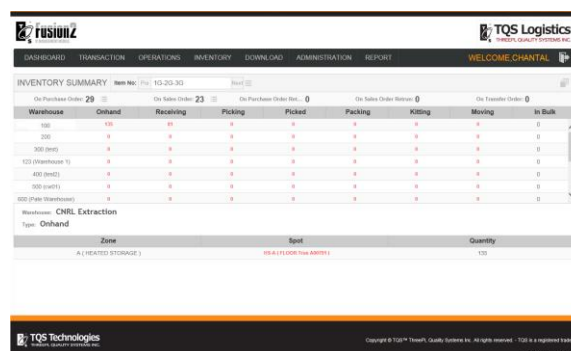Mouseover Inventory and click **Item Inventory** or **Spot Inventory**.

Item Inventory

To view the details of a particular item, enter an item number into the Item No field at the top and click the orange arrow.
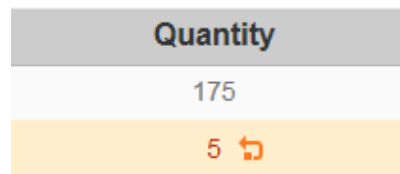
A detailed list of the item appears. The quantity that is on any orders shows above the list while the list shows the quantity in each warehouse and its status.

Quick Move

An item can be moved from one spot to another without having to create a Move Slip. Beside the Quantity the Quick Move icon appears when you mouseover the row.

Spot Inventory

To view the details of a spot, enter the spot code into the field and click the arrows.

Inventory Adjustment

To adjust the inventory, click the Adjust Inventory icon at the top right on the Item or Spot Inventory page.

Fusion 2 Mobile

Fusion 2 Mobile integrates seamlessly with the Fusion 2 web portal.

Navigate to the Download page and click Download next to Fusion 2 Mobile

Printer Agent

The Printer Agent allows you to connect different printers to Fusion 2 and Fusion 2 Mobile. You can configure the default printers for different size labels.

Navigate to the Download page and click Download next to Printer Agent

Administrative Functions

The Administration tab allows you to manage the different aspects of Fusion 2. Mouseover Administration to view all the functions.

Field Management

Field Management is where you can manage any additional comments made on orders or slips.

Barcode Management

Barcode Management allows you to manage all the barcodes in the system.

Company Management

Company Management is where you can manage any companies in the system. A company can be a dealer, dock, or vendor.

Corporate Profile

The Corporate Profile page is where you can edit and update your own company information.

Item Management

The Item Management page is where items and categories can be managed.

Lot Management

Lots can be created and edited in the Lot Management Page. Lots can be used to distinguish multiple batches of the same product.

Printer Agent Management

The Printer Agent Management page is where printers can be managed. The Printer Agent needs to be installed on the computer before proceeding.

User Management

The User Management page displays all the information pertaining to each user. This is where the administrator can add and edit users. There are three user types: Administrator, User, and Client.

Warehouse Management

The Warehouse Management table is where all the information about your warehouse, zones, and spots can be managed.

Reports

Reports can be generated for:

- Warehouse
- Items
- Transaction Info
- Back Orders
- Inventory

Each type of report has multiple categories to choose from.

Additional information may be needed such as dates, or warehouse information.
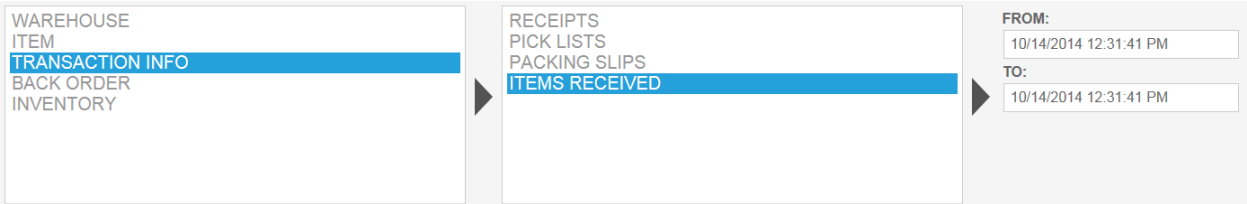
Reports can either be exported to PDF, Excel or printed.

To print reports, make sure Printer Agent has been installed on your machine.
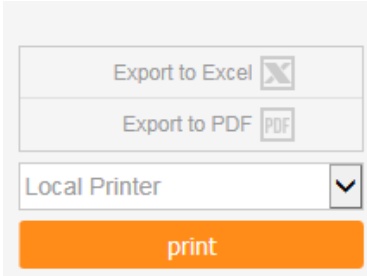
Plugins

Preservation

The Preservation system is used to record necessary maintenance of an item and send out notifications for upcoming maintenance.

The Preservation page shows a list of all current and past preservation items.

A search can be performed by Item, User Name or Instruction
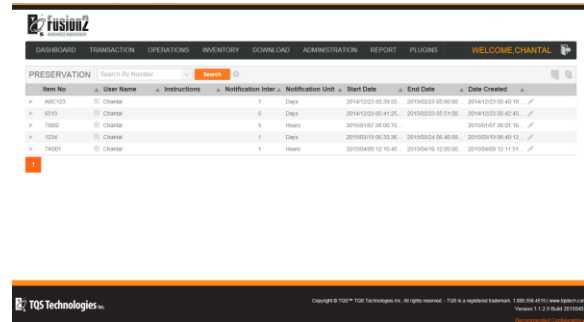
Set Preservation

Add a new preservation to be recorded and set up an email reminder for when the maintenance needs to be performed.

The Notification Date is the date and time the reminder email will be sent out.

The Due Date is the date and time of the expected maintenance.
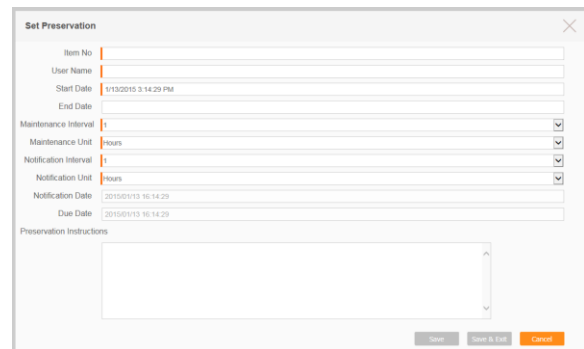
Maintenance List

A list of all scheduled and performed maintenance for each item is available. Click the arrow on the left of the row to expand the maintenance.

Preservation Log

The Preservation Log for each scheduled maintenance can be updated.

Click the icon in the corresponding preservation row

Import Data

The Import Data function allows you to get all necessary data into Fusion 2 by using the provided templates.

There are templates to import Company, Warehouse, Zone, Spot, Item Category, and Item information.
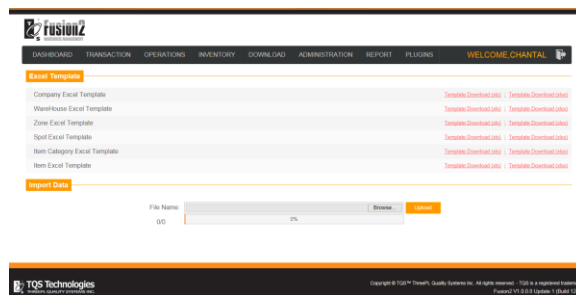
Templates

Click **Template Download** for the template and format (.xls or .xlsx) you wish to download. Fill in all fields that are highlighted orange, these are the mandatory fields. Some of the fields will have a drop down menu; you must select from the given options.
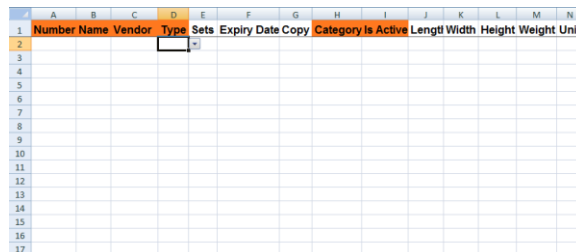
Import

Upload the excel file into TQS Fusion 2.

If the upload was successful, the words Complete Execution will appear.

If the upload was unsuccessful, a list of the errors will appear.
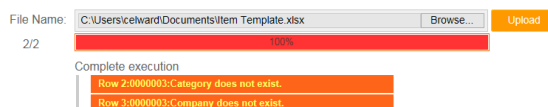
Symbols

Symbol	Meaning	Symbol	Meaning
	Add		Receipt Slip
	Allocate Barcode		Add Receipt
	Advanced Search		Pick Slip
	Advanced Search		New Pick Slip
	Export		Pack Slip
	View Barcode		New Pack Slip
	Print		Change
	Exit		Quick Move
	Edit		Sort
	Changes made		Spot
	New		Expand
	Sign Out		Printer Settings
	Make Default		View List
	Sales Order		Warehouse Return
	Purchase Order		Vendor Return

Support

Please contact TQS Technologies with any concerns:

Toll Free: 1-888-556-4515

Email: info@tqstech.com

Website: www.tqstech.com

Address

2400 Winston Park Drive

Unit #3B, Oakville, ON, L6H 0G7 Canada