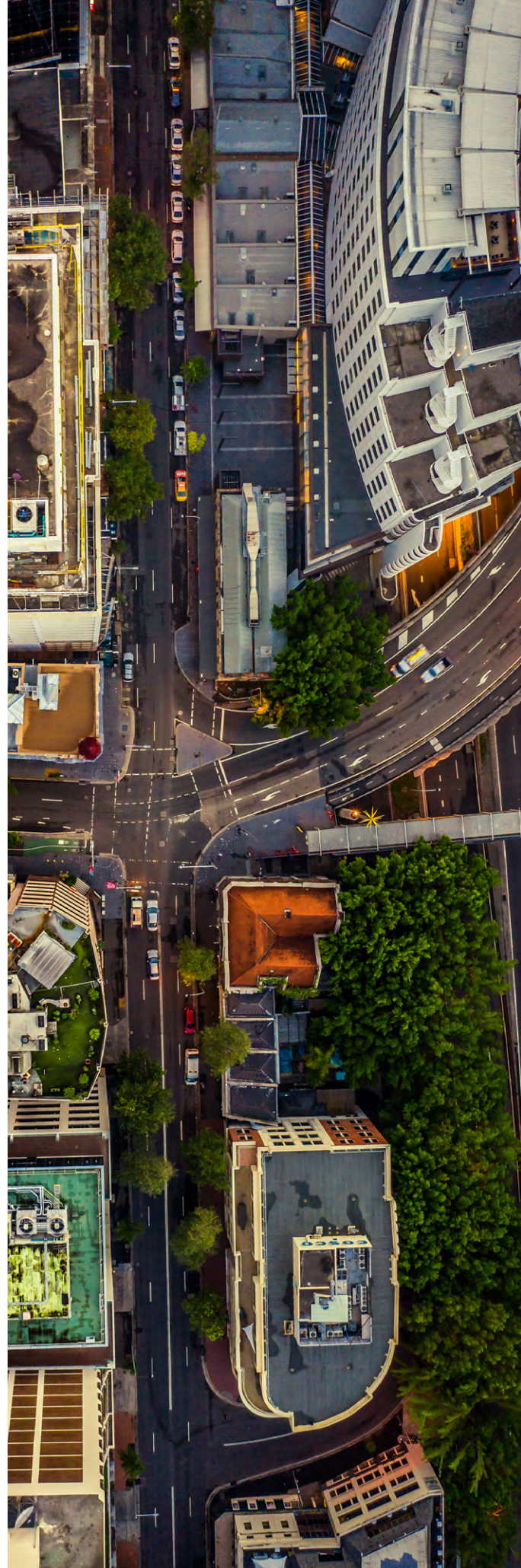


INFUSION

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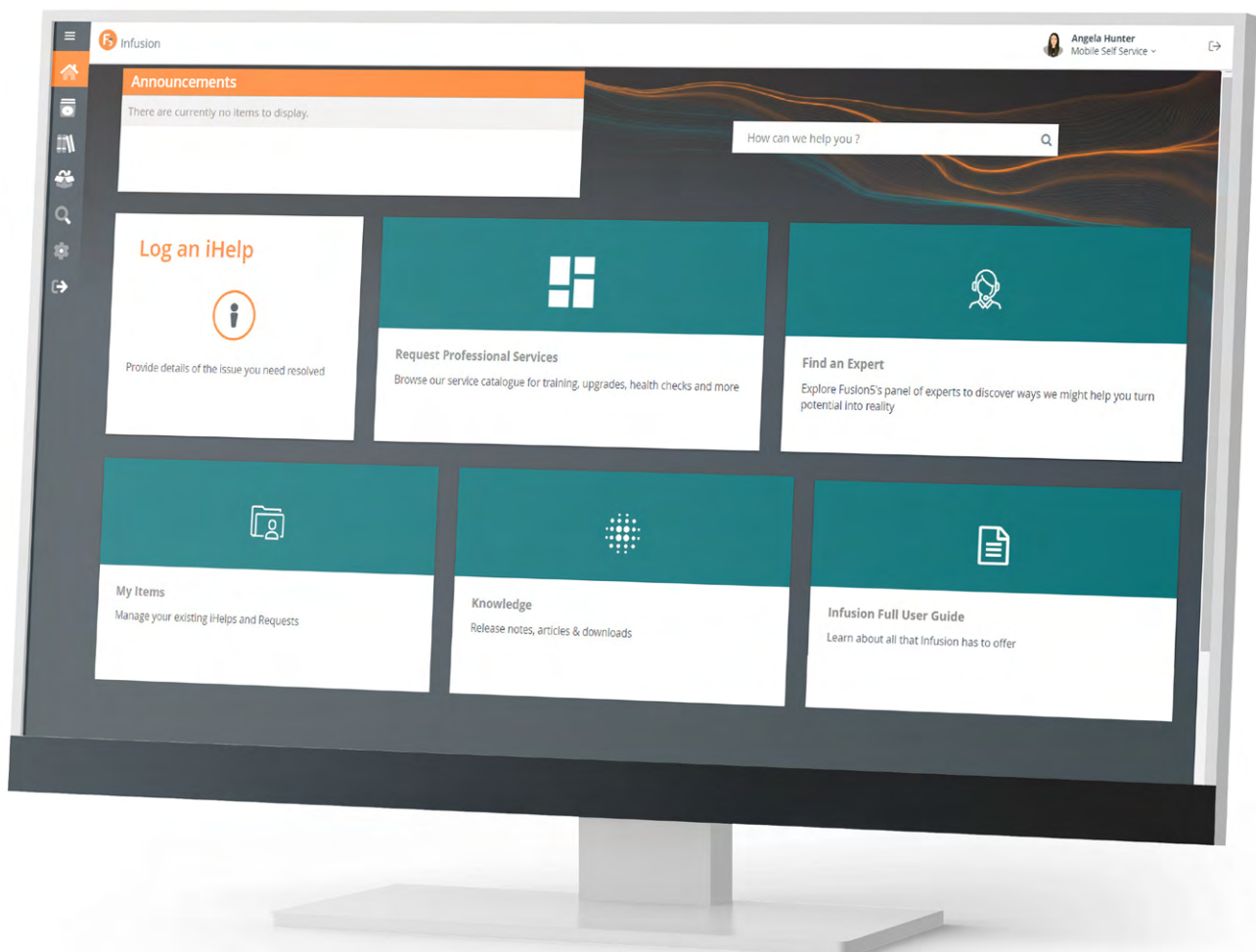


1 Welcome to Infusion

Infusion is our customer portal to access 'all things Fusion5' including:

- Log your iHelp issues and service requests.
- View relevant announcements about new releases, planned outages or upcoming events.
- Easily request professional services such as training, upgrades, and on-site consultant sessions.
- Access knowledge and resources such as how-to documents and fixes to common issues.
- Find an expert across a range of business topics to improve, expand, or imagine new possibilities for your business.

Infusion access is provided to Fusion5 customers only with access subject to approval.



2. Getting started and setting up your Infusion account

2.1 Request access

1. **Request access yourself by [completing the access request form](#)**, or asking a colleague who has access to Infusion already, to request access on your behalf through the Service Request 'Request an Infusion Login'.

Your business email will be used for your Infusion username. For security reasons, Fusion5 will not set up access to Infusion against non-business domains such as Gmail, Live etc.

2. **Our Customer Success Team will process your request** and send you an account activation email to setup your password and multi-factor authentication options.

HINT: Emails will come from 'noreply@fusion5.com.au.' If you don't receive the account activation email within one business day of submitting the request, please check your junk folder.

2.2 Activating your account

1. **Open the 'Activate your Fusion5 Infusion account' email** sent from 'noreply@fusion5.com.au'.
2. **Click the 'Activate Fusion5 Account' button.** This will open the Fusion5 account setup in a new window. If the link has expired, please contact Fusion5 via Live Chat (on the [Fusion5 website](#)) or by calling us on 1300 156 640 (Australia) or 0800 354 357 (New Zealand).
3. **Set a new password.** Set a new password that meets the password requirements.

Welcome to Fusion5, Ryan!
Create your Fusion5 account

Enter new password

Password requirements:

- At least 10 characters
- A lowercase letter
- An uppercase letter
- A number
- A symbol
- No parts of your username
- Does not include your first name
- Does not include your last name
- Your password cannot be any of your last 6 passwords
- At least 2 hour(s) must have elapsed since you last changed your password

Repeat new password

Add a phone number for resetting your password or unlocking your account using SMS (optional)
Okta can send you a text message with a recovery code. This feature is useful when you don't have access to your email.

Add Phone Number

Create My Account

4. **Click 'Add Phone Number'** to add your phone number for resetting your password or unlocking your account using SMS (optional).
 - a. Select your country and enter your Phone number. Then click 'Send Code'.
 - b. You'll receive a text message on your mobile phone number with a code. Enter the code and click 'Verify'.

Forgot Password Text Message

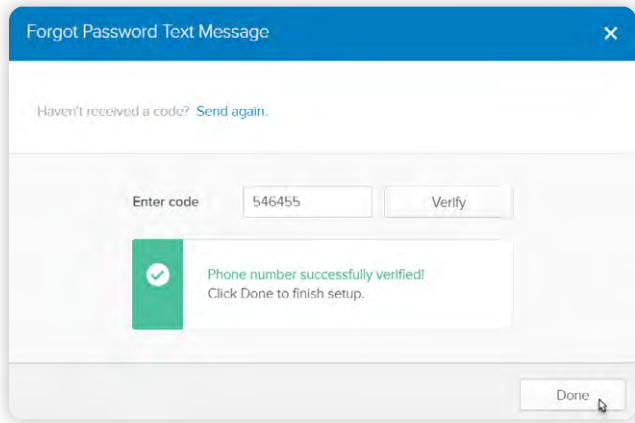
Enter the phone number you'll use to receive codes via text message, then click Send Code to verify that it works.

Country: Australia

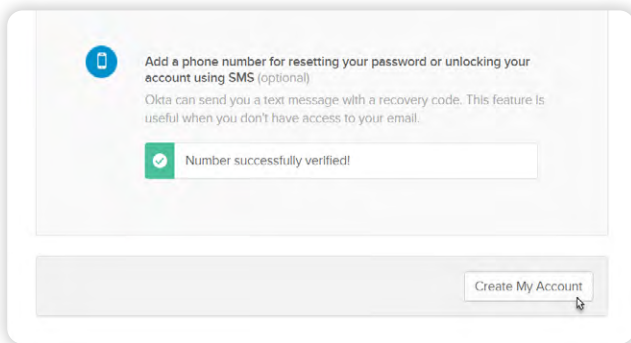
Phone number

Send Code

c. Once the code is verified click 'Done'.

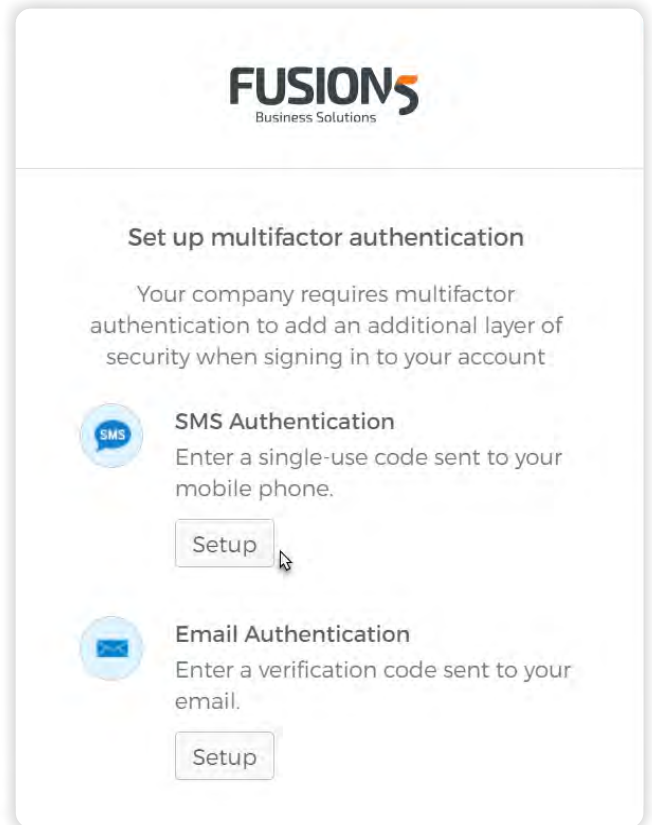


5. You're now ready to activate your account by clicking 'Create My Account.' This will create your account and direct you to the Infusion Home Page.

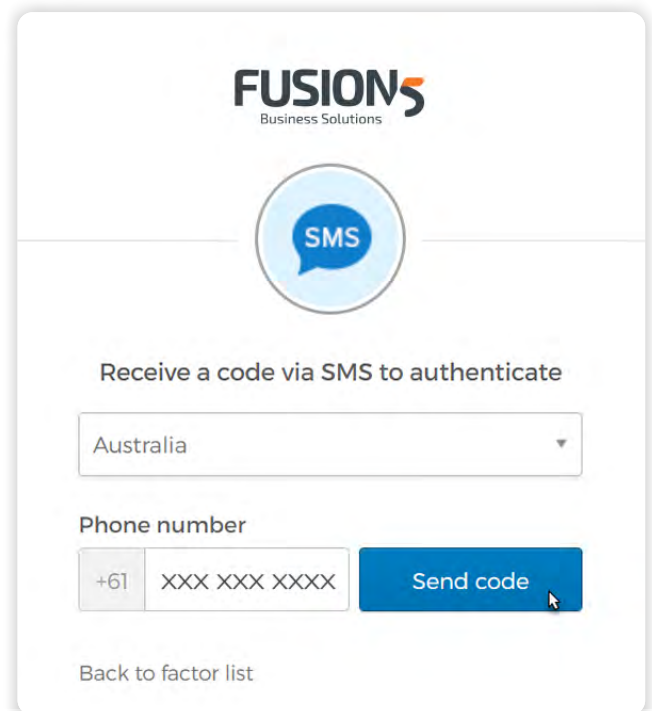


2.3 Multi-factor authentication

1. The next time you log into Infusion you will be asked to 'Set up multi-factor authentication'. Setting up multiple multi-factor authentication options is a great way to ensure your account is secure and provides you with options to reset your password in future should you forget it. Your phone number entered here is used for multi-factor authentication and the security of your Infusion account. It's not used in any other way by Fusion5.
2. To set up SMS Authentication click 'Setup'.



d. Select your Country and enter your mobile number, then click 'Send Code.' You will receive the verification code on your mobile device within 30 seconds.



- e. Enter the code then click 'Verify'.
3. To set up Email Authentication click **'Setup'**.
 - a. Click **'Send me the code'**. You will receive the 'Confirm it's you!' email containing the verification code within 30 seconds.
 - b. Enter the code then click 'Verify.'
 4. Once you have completed the multi-factor authentication setup you will be logged into Infusion.

2.4 Forgot your password?

You can self-reset your password using the forgot password option on the Infusion login page.

Remember me
 Sign In
[Need help signing in?](#)
 Forgot password?
 New User? Request Access

- a. Click either 'Reset via SMS' or 'Reset via Email'.
- b. **Reset via SMS**
Note: SMS can only be used if a mobile number has been configured. Enter the verification code, click verify, and you will be asked to set a new password.

Enter verification code sent via SMS
 Enter Code
 8 2 2 6 9 2 Re-send code
 Verify
 Didn't receive a code? Reset via email

c. Reset via Email

The verification email will come from 'noreply@fusion5.com.au.' Please check your junk folder if you do not receive this email within a few minutes of requesting a password reset.

Click the Reset Password button in the email to set a new password.

2.5 Report suspicious activity

If you receive emails suggesting suspicious activity, please report the issue to Fusion5 via Live Chat (on the Fusion5 website) or by calling us on 1300 156 640 (Australia) or 0800 354 357 (New Zealand).

3. Logging into Infusion

1. Go to the [Fusion5 website](#) and click on 'Infusion' in the top left-hand corner, or you can bookmark the Infusion login page infusion.fusion5.com.au.
2. Enter your business email and password. Tick 'Remember me' if you would like you would like Infusion to remember your device. Only do this on devices that are not used by multiple employees.
3. Click **'Sign In'**.

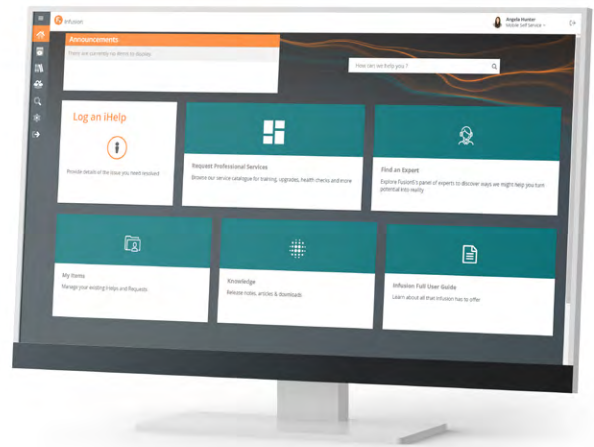
Welcome to Infusion
 Business Email
 test@fusion5.com.au
 Password
 [Masked Password] [Eye Icon]
 Remember me
 Sign In
 Need help signing in?

- The first time you login from any new device, you will be prompted to verify that it is you logging into Infusion by receiving a code via SMS or email. Choose your preferred option and click 'Send Code'. After you have done this once and ticked 'Do not challenge me on this device again', Infusion will remember your device.

HINT: To change your authentication factor method, click the arrow and select an authentication option.

4. Infusion Home Page

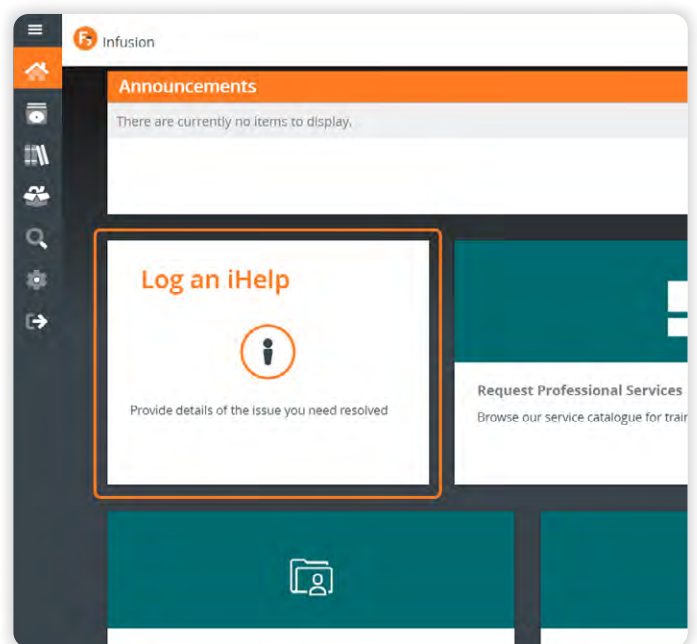
You're in! Welcome to the Infusion home page. From here you can navigate to the iHelp, Service Request and Knowledge base items available to you within Infusion. For any issue or help needed with one of your solutions, logging an iHelp is the way to go! iHelps are tied to the agreed service levels you may have with Fusion5.



5. Logging & managing iHelp issues

5.1 Log an iHelp issue

- Click '**Log an iHelp**' on the Home Page.

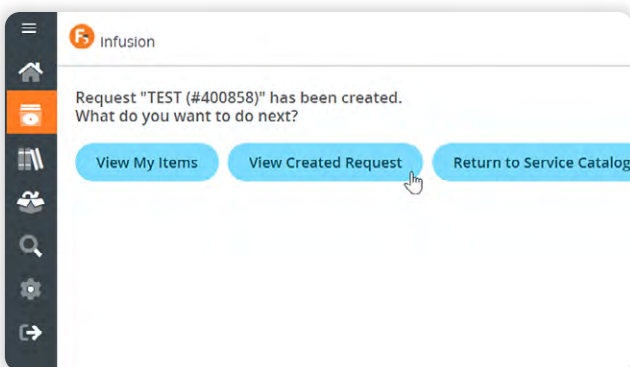


- Complete the following fields, then click the 'Log Issue' button.

Field	Description
Priority*	Select from the list (refer to section 5.1.1 for help with selecting the correct priority for your issue)
Category*	Select issue type e.g., BAU, Bug, Work Order
Environment	Enter if applicable
Product*	Select the product you are logging the issue for
Module	Enter if applicable
Version	Enter if applicable
Summary*	Enter a short summary of the issue you're experiencing
Description*	Enter a full description of the issue including the steps to replicate if applicable
Reference number	Enter if applicable
Attach file	Click 'Attach file' to provide supporting documentation. Screenshots are especially useful

* Mandatory fields

- To view the issue, select 'View Created Request' otherwise, select your preferred next step.



- You will receive an email confirming your iHelp issue has been logged.

5.1.1 Selecting the appropriate priority for iHelps

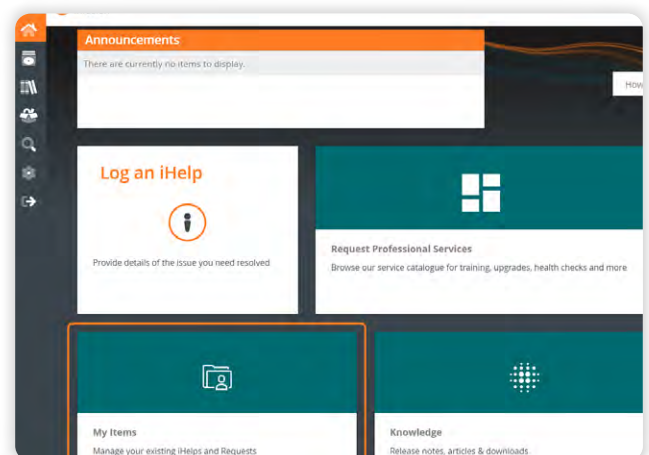
Please select the appropriate priority for any iHelp issue raised. The priority drives our Service Levels and Response process.

- Priority 1. Such a support call will have one or more of the following characteristics:**
 - » Business critical operations are interrupted or halted
 - » Critical deadlines are threatened
- Priority 2. Such a support call will have one or more of the following characteristics:**
 - » Normal operations are interrupted and may be restricted but users are able to continue working
 - » The problem affects an individual's access or ability to work
- Priority 3. Such a support call will have one or more of the following characteristics:**
 - » Temporary workaround can be found
 - » Fault does not impact on normal operations
- Priority 4. Such a support call will have one or more of the following characteristics:**
 - » General questions or information requests concerning the operation of the Application System.

5.2 Viewing your iHelp issues

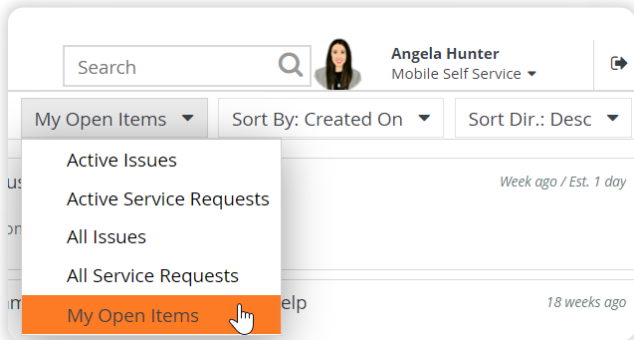
At any time, you can view your iHelp Issues, track updates and add additional information to them as may be needed.

- To view your iHelps, click 'My Items' from the left sidebar menu or from the Home Page.



2. If you can see the iHelp issue already, click on it to view the details. If not, type the iHelp number into the search box and click the search icon.

If you don't know the iHelp number, select the applicable saved search from the drop-down to view a list of iHelp issues.



- a. **Active Issues** shows all active iHelp issues that have been raised across your organisation.
- b. **Active Service Requests** shows all active Service Requests that have been raised across your organisation.
- c. **All Issues** shows all iHelp issues that have been raised across your organisation, regardless of status.
- d. **All Service Requests** shows all Service Requests that have been raised across your organisation, regardless of status.
- e. **My Open Items** (default) shows all active iHelp issues and Service Requests, raised by you.

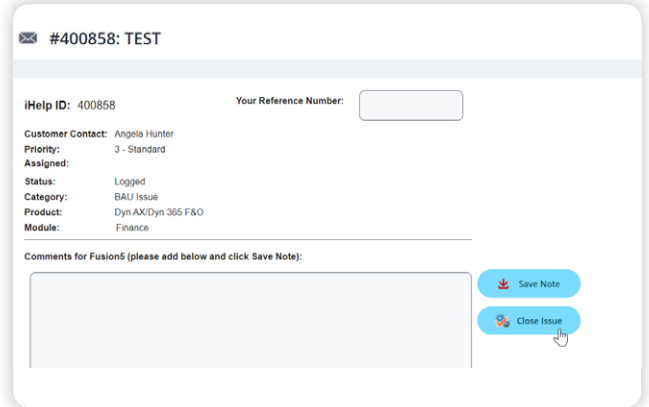
3. Click on the iHelp issue to view the details of the issue.

4. If the iHelp issue is still active you can:

- a. Add or update your reference number.
- b. Update the status of the issue if it is not correct by clicking 'Update Status' and selecting the correct status.
- c. Add additional comments for Fusion5 by writing in the comments box and clicking 'Save Note'.
- d. View the history of the issue by clicking 'View Activity Report'.
- e. Add additional attachments by clicking 'New Attachment' finding your file then selecting 'Open'.

5.3 Closing an issue

You can close an issue yourself by clicking 'Close Issue' and entering in the reason you are closing the issue, then 'OK'. This will notify the consultant. If an issue is resolved to your satisfaction, it will automatically close 5 business days after resolution.



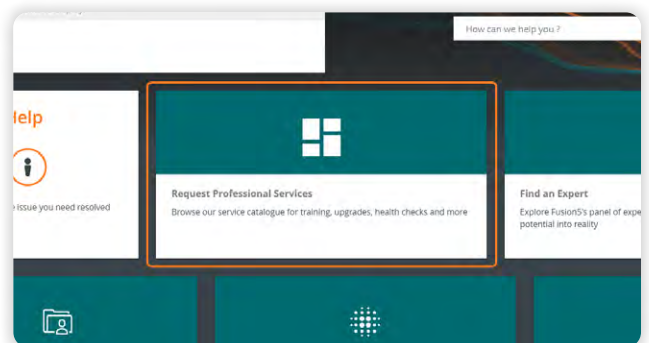
6. Request Professional Services

Our Service Catalogue is a great way for you to kick off professional services requests from arranging training, to planning enhancements or upgrades, deployments, new reports, or new integrations.

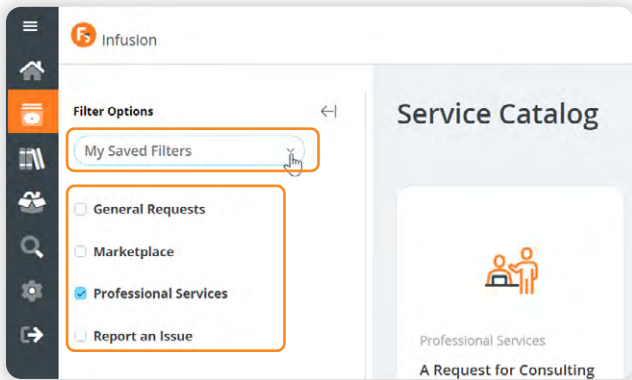
Browse our catalogue of service requests, provide as much information as possible and your Service Delivery Manager will be in contact to get the ball rolling

6.1 Request Professional Services

1. Click 'Service Catalogue' on the left sidebar menu or the 'Request Professional Services' button on the Home Page.



- Use the filter options to find the request you are after.



- Click on the request you are after.

Professional Services:

- A request for Consulting Services.
- Book an Innovation Ideation.
- I want a new integration.
- I want a new report.
- I want a system upgrade.
- I want an enhancement to my system.
- I want to implement a new module.
- I would like to arrange Training.
- Would like to get a Health Check.

General Requests:

- Fusion5 Connect
- Request an Infusion or Marketplace login
- Update My Contact Details
- What's happening at Fusion5

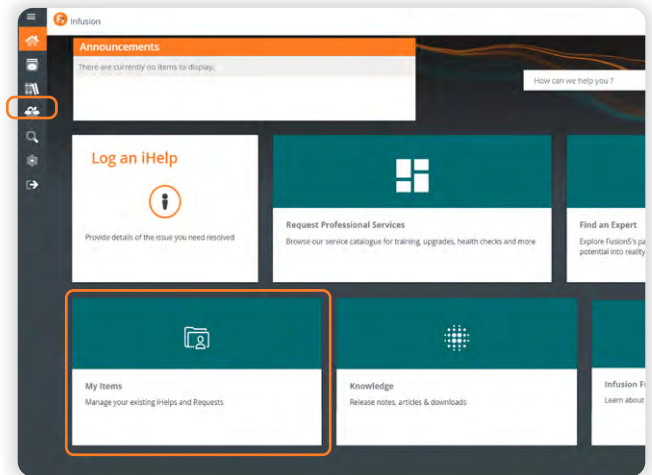
- Fill in the required fields and click 'Review and Submit' then 'Submit'.

If you are not ready to submit your request, click 'Save for Later.' You can view your draft requests in the "My Items" section.

- To view the request, click 'View Created Request' otherwise, click your preferred next step.
- You will receive a confirmation email confirming your request has been logged.

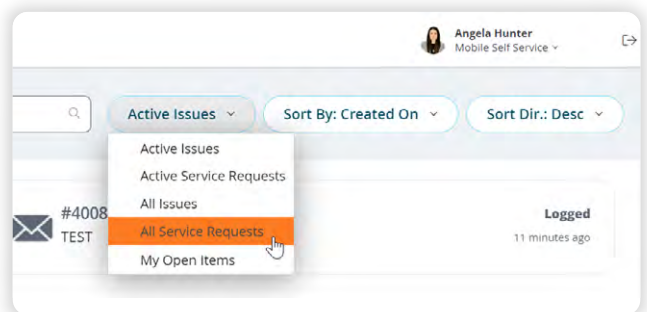
6.2 Viewing your Service Requests

- Select 'My Items' from the left sidebar menu or from the Home Page to view your issues and requests.



- If you can see the request already, click on this to view the details. If not, type the request number into the search box and click the search icon.

If you don't know the request number, select the applicable saved search from the drop-down to view a list of iHelp issues and requests.



- Click on the request to view the details.

4. If the request is still active you can:

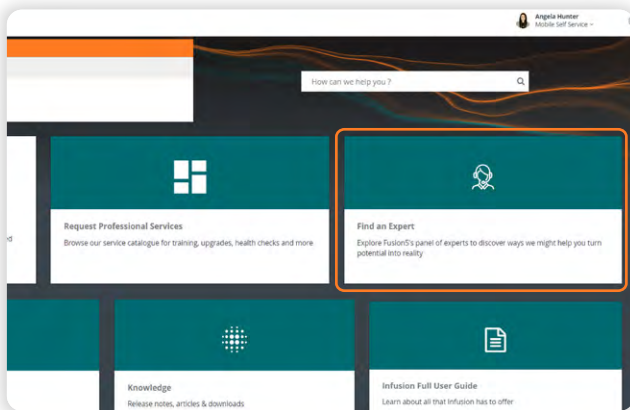
- Add additional comments for Fusion5 by clicking on the 'Notes' tab and selecting 'Add Note' then 'Submit.'
- Add additional attachments by clicking on the 'Attachments' tab and selecting 'New Attachment', finding your file then selecting 'Open.'
- View the history of the request by clicking 'Self Service Details.'

7. Find an Expert

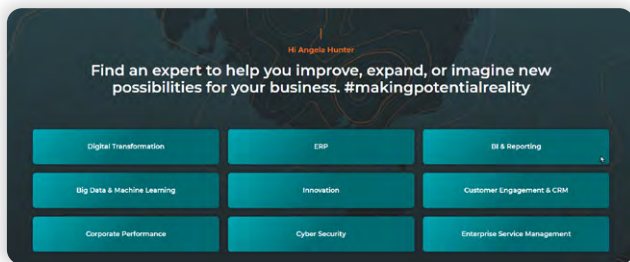
Sometimes you may want to seek advice on how to tackle a particular business problem; gain business advice in specific areas such as solution architecture, budgeting and forecasting; or moving to the cloud.

Find an Expert is a great way for you to connect to our experienced and senior leaders in our business to explore your thoughts and ideas to help you shape up your next project or business initiative.

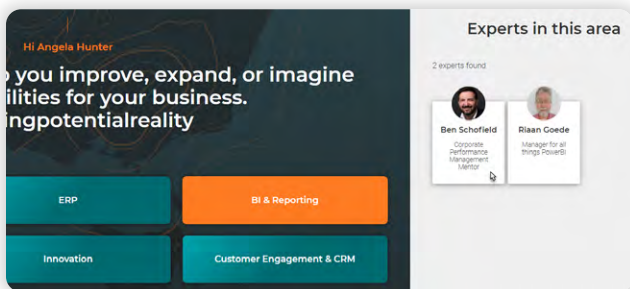
5. Click 'Find an Expert' on the Home Page. Find an Expert will open in a new tab.



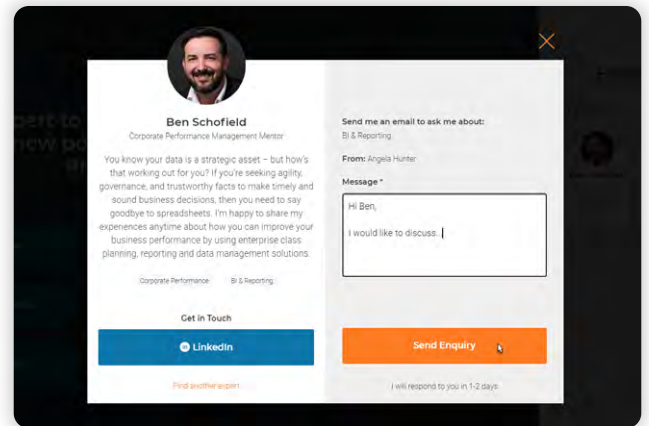
- a. Select the category that you would like to view Fusion5 experts for.



- b. Select the expert you would like to read about or contact.



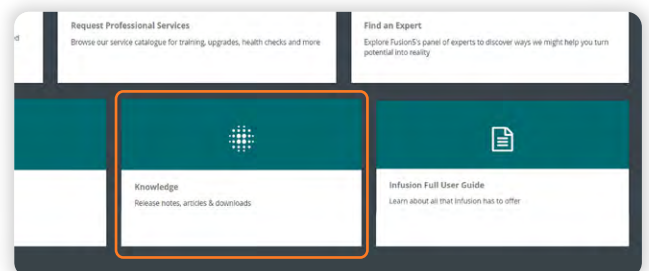
- c. Get in touch with your chosen expert via LinkedIn or send an enquiry using the form.



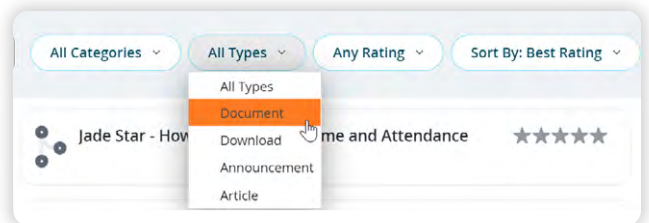
8. Knowledge and resources

Knowledge and Resources is a centralised place for you to access useful tips, how to documents or other product resources for your solutions. You will automatically be given access to the knowledge articles relating the products that Fusion5 supports you for.

1. Click 'Knowledge Base' on the left sidebar menu or 'Knowledge' on the Home Page.



2. Search Knowledge using the search bar or filter Knowledge using the dropdown options on the right-hand side.



Types of Knowledge:

- Document
- Download
- Announcement
- Article

3. Click on the Knowledge you would like to view.

FUSION⁵
Business Solutions