FuseCharts

Create clear and concise structure charts within seconds

FuseCharts™ Help Guide

FuseCharts

Before you start

Who is FuseWorks?

FuseWorks provides the tools your team needs to work smarter, so they can focus on work that matters.

Check out our range of smart software solutions for accountants at www.fuse.work

What is FuseCharts^{TM}

FuseCharts^{TM} is designed to help you create structure charts, simply. With FuseCharts^{TM}, anyone in your team can transform the most complex of client.

FuseCharts^{TM} is a fully intuitive application with a simple user interface making it easy for everyone in your organisation to create, edit and adapt stlructure charts for your client's specific needs.

How to get help with using FuseCharts^{TM}?

Access our help centre www.fuse.work/help-fusecharts for tips and tricks to create your structure charts, simply.

Or you can contact us by email at support@fuse.work

Getting Started

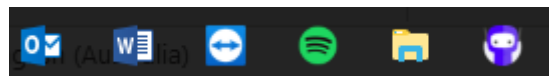**Install FuseCharts^{TM}**

You can install FuseCharts^{TM} directly on to the computer you intend to use the software on. Each user needs to be licenced with a licence key.

1. Follow the download link in your email, or www.fuse.work/fusecharts to access the download file directly.
2. Click on the download and press 'Run'.
3. Follow the prompts to install FuseCharts^{TM} on your computer.
4. You will then need to enter your trial or key to activate FuseCharts^{TM}.
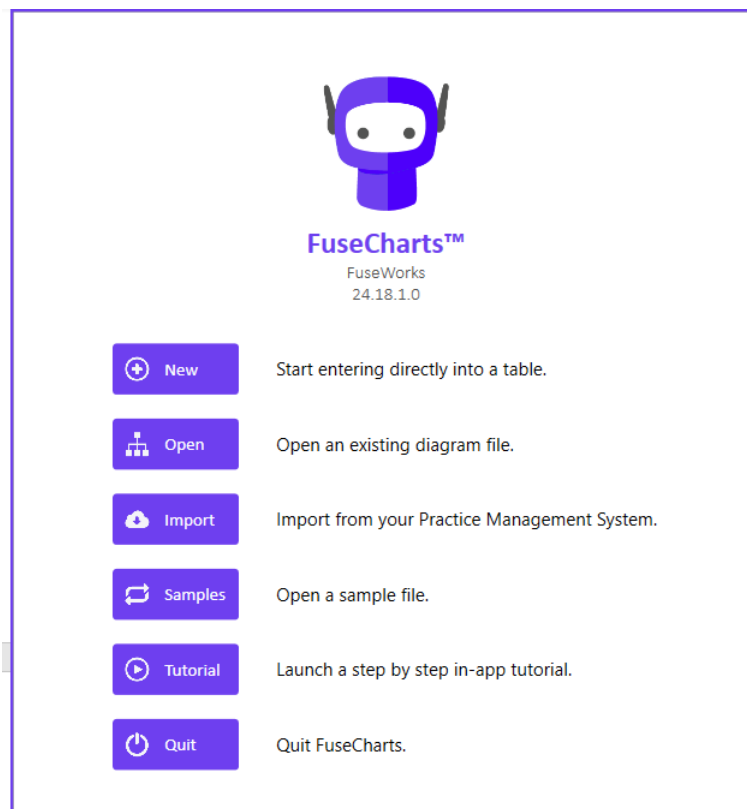5. Each serial key can only be used on one computer.

How do I access FuseCharts™?

Access FuseCharts™ like any application on your computer, we suggest you 'pin' a short cut to your taskbar.


Once you've installed the software, navigate to the APP

FuseCharts™
FuseWorks
24.18.1.0

⊕ New	Start entering directly into a table.
🔀 Open	Open an existing diagram file.
☁ Import	Import from your Practice Management System.
⇄ Samples	Open a sample file.
▶ Tutorial	Launch a step by step in-app tutorial.
⏻ Quit	Quit FuseCharts.

It's your first time?? Run through the in-app Tutorial

We suggest you run through the **Step by Step in-app Tutorial** to get a quick overview on how to use Fuse-Charts to create your structure diagram.
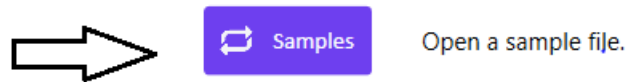
1. Using the FuseCharts^{TM} welcome screen
   a. Select 'Tutorial'
   b. You will be stepped through an online tutorial
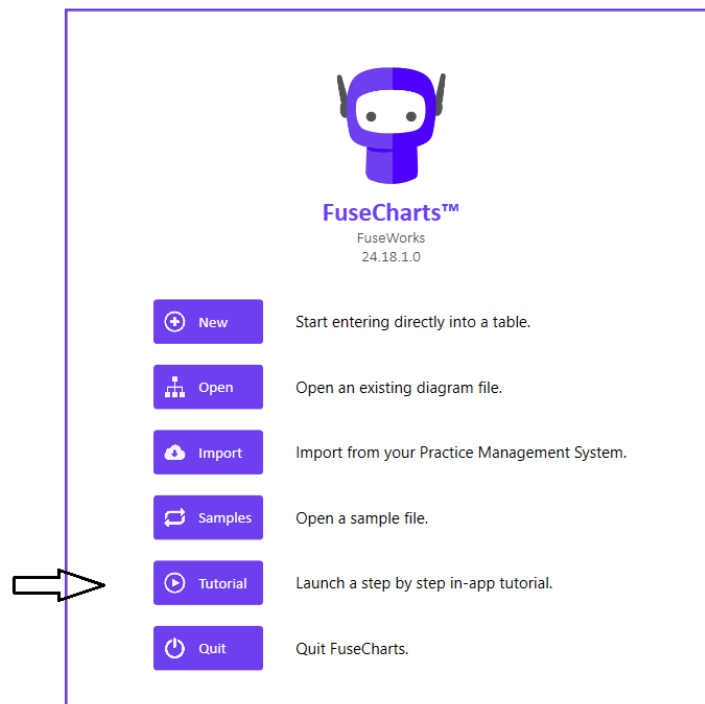
FuseCharts

How do I open a sample file?

Navigate to the FuseCharts^{TM} welcome screen and click on one of the following pre-populated sample files:

Samples — Open a sample file.

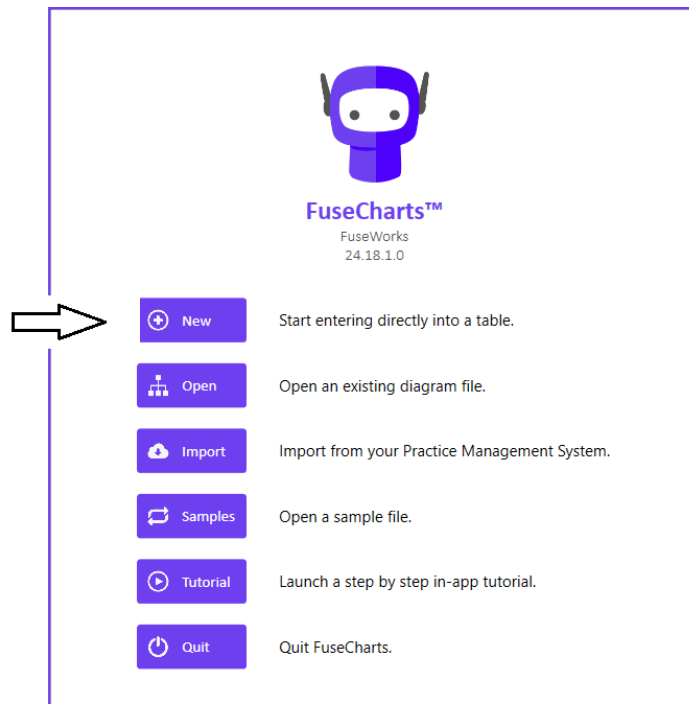This will give you an example of a simple 'Mum and Dad' family group.

How do I complete a chart for a new family group

How do I create a new chart?

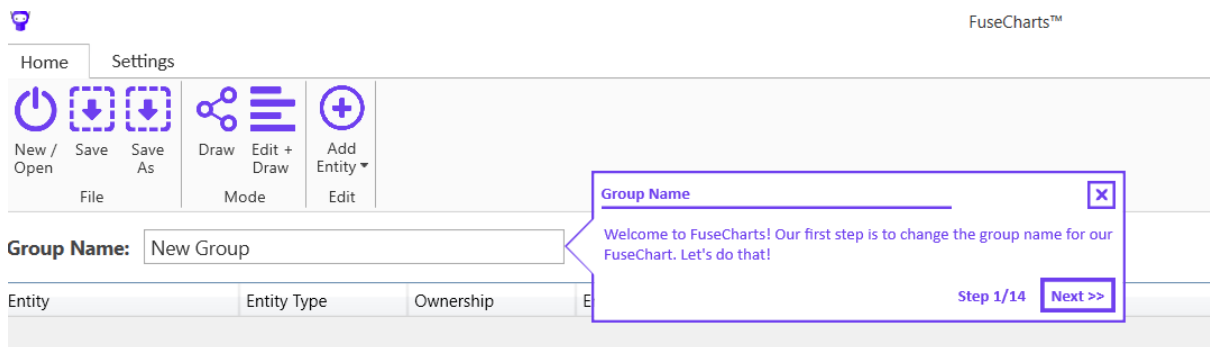*We suggest the first time you use our Step by Step in-app Tutorial. (See heading above)*

1. Using the FuseCharts^{TM} welcome screen

   a. Select 'NEW'

How do I enter a new group name

a. Start by entering a Group Name
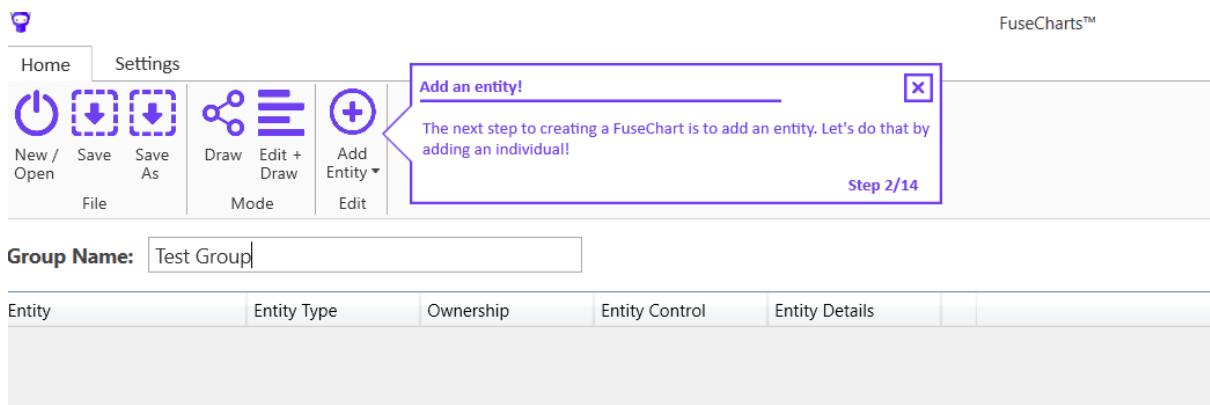
How do I add an entity?

a. From here start adding all of the entities within the group

How Do I add details about the entity's?

- You can add details about the entity under the relevant columns
    - Ownership/Entity Control and Entity Details
- Simply click on the cog wheel where you will be presented with options to add in.

How do I remove a rows on the data sheet

Click on the **X** on the row to simply remove an entity

Previewing and editing your chart

You can preview the chart before finalising at any time
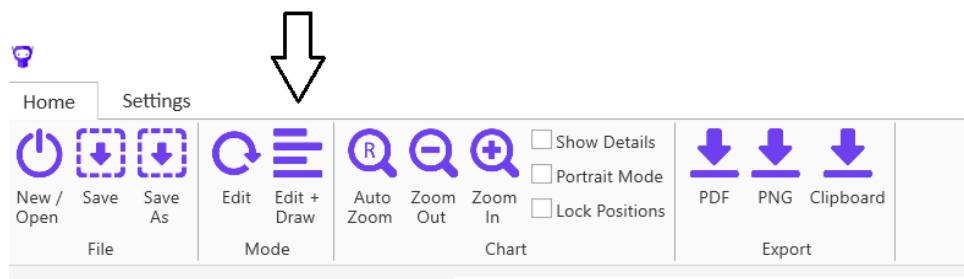
You can toggle between Edit, Draw and Draw + Edit at any time.

How do I open an existing chart?

1. Using the FuseCharts^{TM} welcome screen

   a. Select 'OPEN'
   b. Navigate to the FuseCharts^{TM} file (*.fch)
   c. All data with respect to the family group, previous chart will be retained in this file.

![FuseCharts logo]

Chart options available

The below are the different chart format options available and some explanation about the different options:

- Show Details
    - All - this will show all of the details (e.g. registrations, notes, directors, etc) on the diagram within the shape
    - None - it will remove all the detail and just show the entity shape, name and relationships within the group
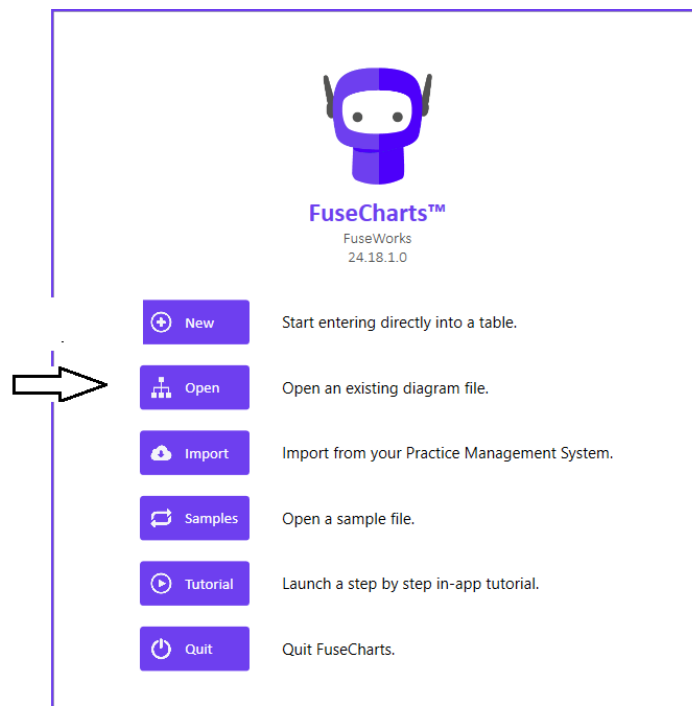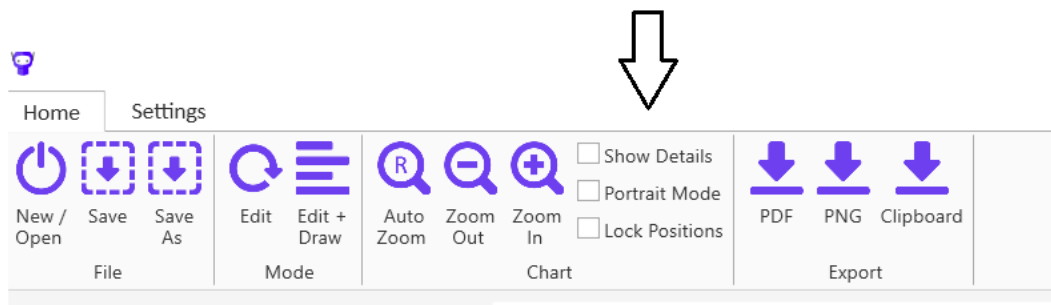
- Portrait Mode - Page format
    - Defaults to Landscape
    - But you can specify Portrait

- Lock Positions format
    - Will lock the current images as presented on the page.
    - *Note if you add other entities you will likely need to re-position them to fit with the existing 'locked' images

- Export Format
    - PDF - this will draw the diagram and print it to .PDF
    - PNG – this will draw the diagram and save it as a .PNG
    - Clipboard – this will copy the diagram to your clipboard for you to open in another application eg Word, Excel etc.

Saving the chart for future use

Once you are satisfied with the chart you should SAVE or SAVE as the file as a *.fch file which will retain all of your details and the chart.
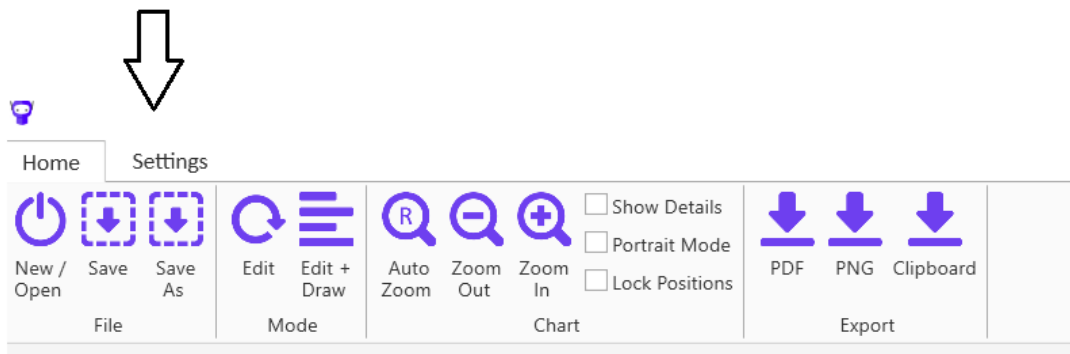
Setting Firm Wide Customisations

Customise firm colours / logos / options

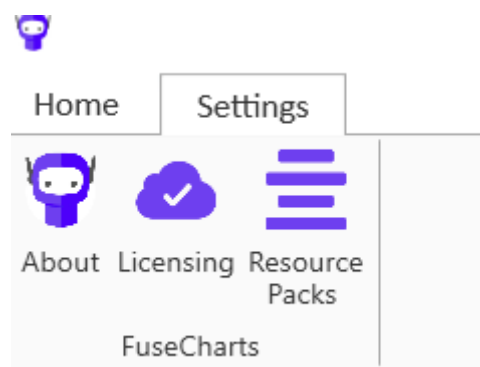You can edit a few areas as part of the initial setup of the software (and amend whenever needed) that can be rolled out across your firm.

Items that can be edited are:
- Type of shapes and colours for entities
- Settings for the output
- Corporate colours and Logo

It is recommended that you take a backup of the below file before you start editing this item.

- Go to the Settings Tab
- And Select Resources

![FuseCharts logo]

Editing the resources

Name	File Path	Enabled

Resource Packs

Create Resource Pack   Load Resource Pack   Reset To Default
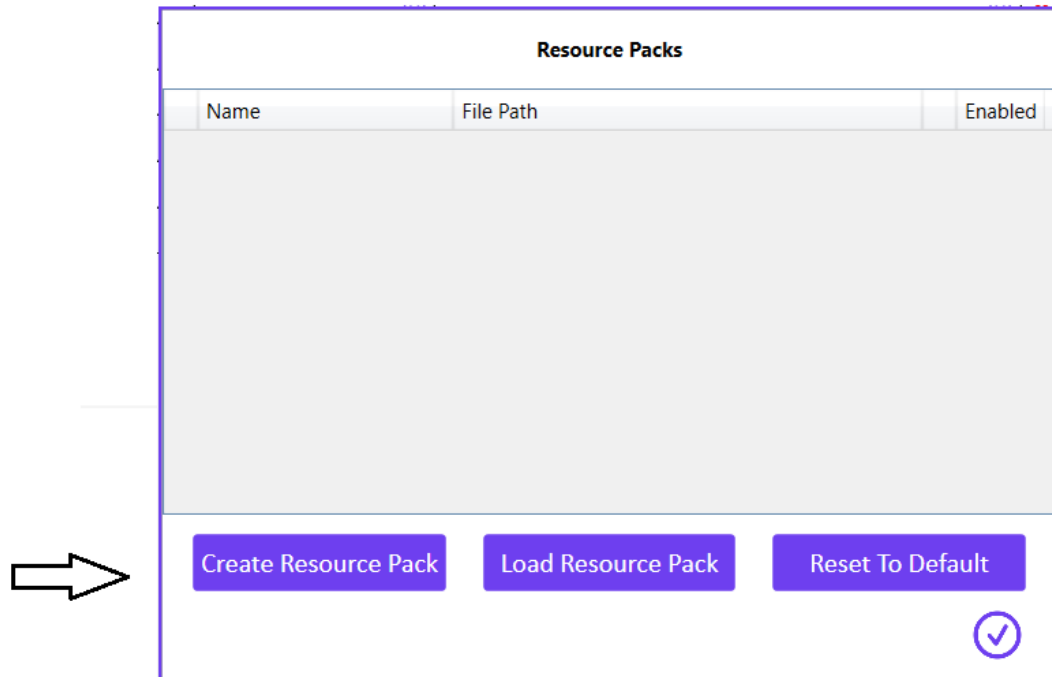
Enter a name for this pack - Resources Name

And save the file as a resources pack file (*.fcres) that others can access on a shared drive.

FuseChartsUI   ✕

Enter a name for this pack (e.g. 'My Corporation')   OK

Cancel
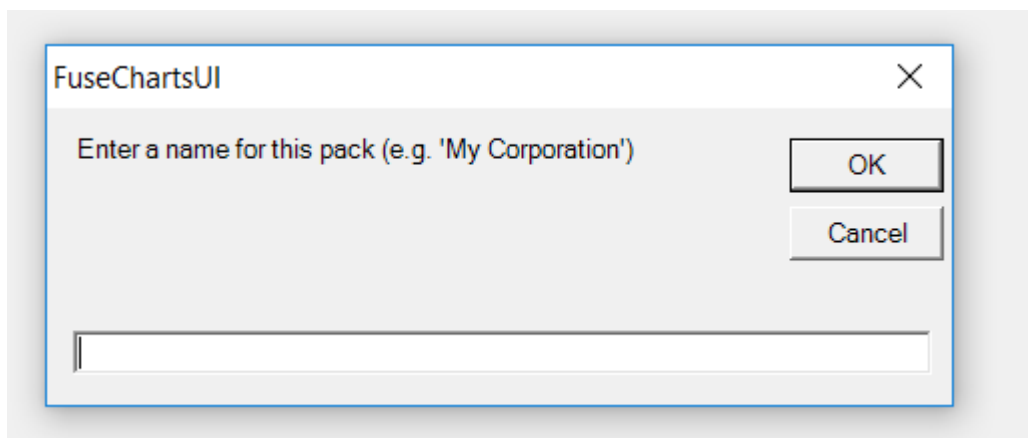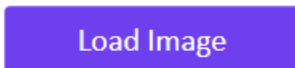
- To edit the default settings click on the cog to open up the settings

Resource Packs

Name	File Path		Enabled
✕ Test Company	C:\Users\MelissaVoss\Desktop\Test Company.fcres	⚙	☐

- From here you will be able to set firm wide defaults

Brand colour:	▇ SteelBlue ▼
Flip charts vertically:	☐
Shape properties:	⌄ Individual
	⌄ Company
	⌄ Trust
	⌄ TrusteeCompany
	⌄ Partnership
	⌄ Superfund
Brand logo:	**Load Image**
	✓

Your chart can be customised with your firm's colour and Logo.

Editing – Brand colour

Select the colour that best reflects your corporate styling. This will be shown on the chart with a line at the top and bottom to border the graph.

Locate the area within the file called [Shape Settings]. You are able to change the colour and shape type within this area. The types of options are:
- Types of shapes: rectangle, circle, diamond, roundedrectangle, linedbox
- Colours of shapes: blue, black, red, orange, purple, green

Editing - Flip charts vertically

- Chart orientation options
  - Select how you want the diagram to draw from the two options:
    - Default - will put the shareholders/beneficiaries of entities BELOW the entity in which they have an interest
    - VERTICALLY - will put the shareholders/beneficiaries of entities ABOVE the entity in which they have an interest

Editing - Shape properties

For each entity type you get flexibility to change the shape properties to best reflect your corporate styling

Shape
Fill Colour
Text Colour
Border Colour

Use this table to update each area per entity.

![FuseCharts logo]

Shape properties:

⌃ Individual

Shape

| Ellipse | ⌄ |

Fill Colour

| White | ▼ |

Text Colour

| ■ Black | ▼ |

Border Colour

| ■ DarkSlateGray | ▼ |

Editing - Firm logo

The logo can be set by loading your saved Image file

Brand logo:

Load Image

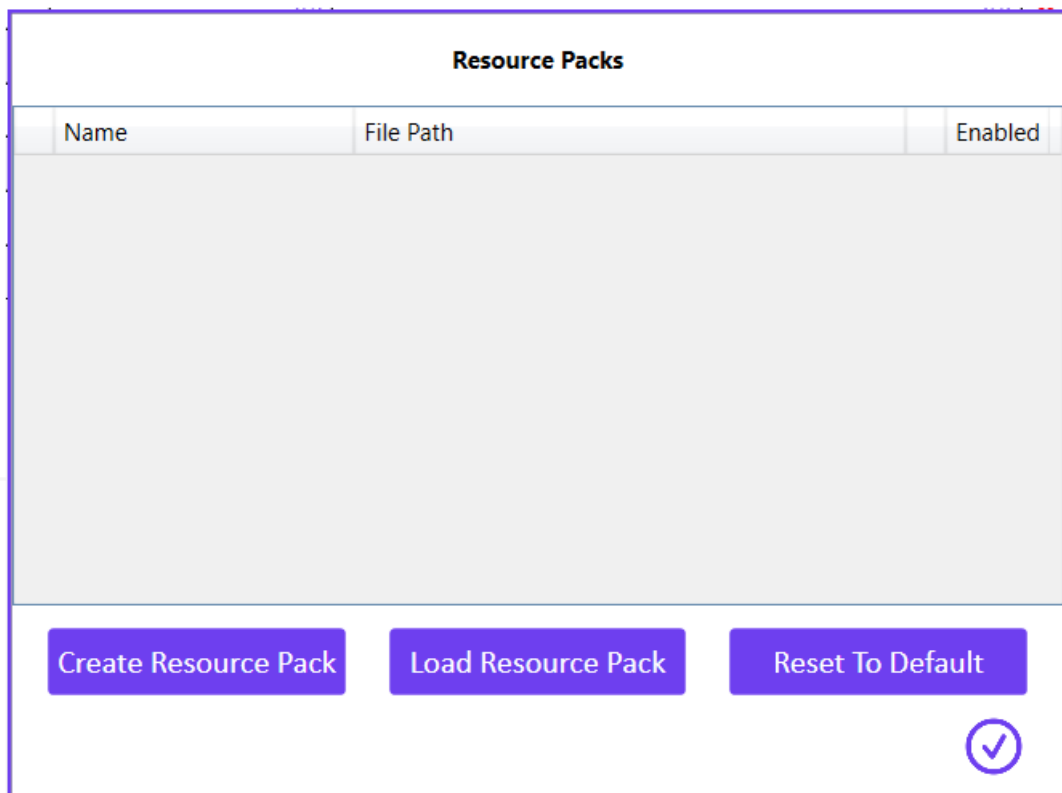**How to roll the resources setting out across your users?**

Once you have customised the file, all users can load the Practice Resources Pack
Navigate to the file and select the relevant Resources pack file *.fcres file

Name	File Path	Enabled

Resource Packs

Create Resource Pack   Load Resource Pack   Reset To Default

Import data from external systems

FuseCharts^{TM} has the ability to import data from existing Practice Management Systems (provided your systems uses the standard family/debtor group structures).

This means that names and entity types of groups can be imported to prefill a list of related entities and make the process of creating diagrams for a group easier.
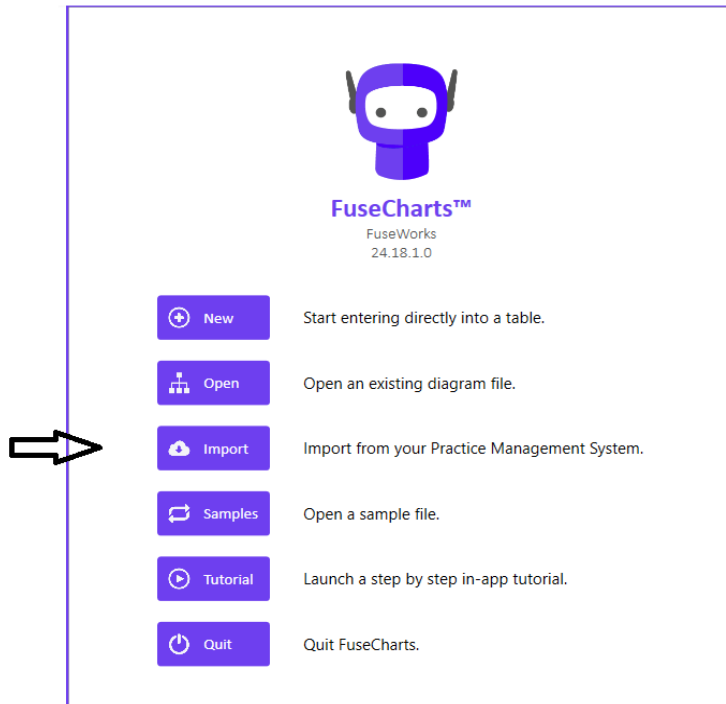
The current Practice Management Systems that this works for is:

- Reckon APS

We are interested in integrating with more systems to make FuseCharts^{TM} even easier to use. If you use another system and would like it to integrate with FuseCharts^{TM} please get in touch with us hello@fuse.work

To setup the import connection

- Go to Import

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⊕ New	Start entering directly into a table.
⊓ Open	Open an existing diagram file.
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FuseCharts

APS Connection

You may need assistance from your IT provider to fill in these details. Currently, only APS is supported.

Name:

APS Connection

Group type:

Debtor

Connection Details

Server:

- OR -

Connection String (this overrides the settings above):

Test

This setting will determine which method will be used, currently the only supported method is Reckon APS. Contact us if you're interested in getting this to work with your practice management system.

If there is something that isn't addressed in this guide, we suggest you refer to the Help Desk articles that can be found at www.fuse.work/help-fusecharts