

# Welcome to MyOptiFuse!

The customer portal allows OptiFuse customers to log in, place orders, track order statuses, and view all their OptiFuse activity in one place.

This guide provides instructions to help you successfully self-serve and manage the customer portal, along with tips and recommendations to ensure a smooth experience.

## Steps for Onboarding

To establish your account, contact us at [customerportal@optifuse.com](mailto:customerportal@optifuse.com) and provide the email address of the user who will serve as your portal admin. You will then receive an email to set your password.

Please note, only existing OptiFuse customers are eligible to create an account.

### Distributor Admin Role

It is important to designate an Admin for your **MyOptiFuse** account. The Distributor Admin is the initial user granted access to the customer portal account. By default, this role has access to all content and features within the portal. The Distributor Admin is the only role that can manage users and control their access and permissions within the account.

The Distributor Admin can also invite additional users to **MyOptiFuse**. User permissions are set by the Distributor Admin when sending the invitation.

## How to Set Up Additional Users

Each individual in your organization who will be using the **MyOptiFuse** portal needs to have their own account. To set up additional users, your Distributor Admin must contact [customerportal@optifuse.com](mailto:customerportal@optifuse.com), providing the email address and portal role for each new user.

Only the Distributor Admin can invite additional users to **MyOptiFuse**. The Admin can also modify the permissions of existing users within the customer portal, allowing them additional access or revoking access to specific features.

To view the users connected to your company's portal, their permissions, and the date of their last login:

1. Log in to your customer portal.
2. Click My Users from the list of Applications.

## About Users and Permissions

There are four main categories of users in **My OptiFuse**, with their respective permissions

**Distributor Admin:** Full access and control over all aspects of the portal.

- Manage all orders (place, modify, cancel, returns).
- Access all inventory, pricing, and technical details.
- View and reprint all invoices and statements.
- Add/modify users and roles, manage shipping addresses.

**Distributor Full View/Act access:** Full order management and account access, without user management.

- Manage all orders (place, modify, cancel, returns).
- Access all inventory, pricing, and technical details.
- View and reprint all invoices and statements.
- Add shipping addresses.

**Distributor Full View access:** View-only access to all orders and account information.

- View all orders, inventory, pricing, and technical details.
- View and reprint all invoices and statements.
- Add shipping addresses.

**Distributor Restricted View/Act access:** Limited access, focused on managing the user's own orders.

- Manage own orders (place, modify, cancel, returns).
- Access inventory, pricing, and technical details.
- View and reprint invoices for own orders.
- Add shipping addresses.

	Distributor Admin	Distributor Full View/Act access	Distributor Full View access	Distributor Restricted View/Act access
Check OptiFuse's inventory availability	Yes	Yes	Yes	Yes
Check product pricing	Yes	Yes	Yes	Yes
View product technical information	Yes	Yes	Yes	Yes
Place an order	Yes	Yes	-	Yes
View the status of current orders and backorders	Yes - access to all orders	Yes - access to all orders	Yes - access to all orders	Yes - access only to orders placed by the user
Make changes to an order	Yes - access to all orders	Yes - access to all orders	-	Yes - access only to orders placed by the user
Cancel an order	Yes - access to all orders	Yes - access to all orders	-	Yes - access only to orders placed by the user
Request additional information about an order	Yes - access to all orders	Yes - access to all orders	-	Yes - access only to orders placed by the user
View previously placed orders	Yes - access to all orders	Yes - access to all orders	Yes - access to all orders	Yes - access only to orders placed by the user
Request a return for an order	Yes - access to all orders	Yes - access to all orders	-	Yes - access only to orders placed by the user
View and reprint invoice information	Yes - access to all orders	Yes - access to all orders	Yes - access to all orders	Yes - access only to orders placed by the user
View open invoices information	Yes	Yes	Yes	Yes
View statement of account information	Yes	Yes	Yes	Yes
Add a new shipping address or freight account	Yes	Yes	Yes	Yes
Add users	Yes	-	-	-
Modify user roles	Yes	-	-	-

## MyOptiFuse Password Resets

If you or one of your users has forgotten the password to your customer portal, go to <https://my.optifuse.com/login/> and click on the "Forgot Password" prompt. You'll receive an email with instructions to set a new password.

For assistance with new accounts, please contact [customerportal@optifuse.com](mailto:customerportal@optifuse.com)