FusionPro User Guide

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**Introduction**

FusionPro is Clare Controls’ newest dealer tool. FusionPro allows dealers to create and manage their accounts for security and home automation. Most pages are mobile phone friendly, allowing the user the ability to access and make changes as needed easily in the field.

Once their account is created, the dealer has access to the FusionPro dashboard. The dashboard displays a summary of accounts under the company and the current number of paid service plans/types.

**FusionPro sections**

FusionPro is divided into different sections for user ease. The sections (Home, Accounts, Companies, and Help Center) allow the user to easily access the desired content.

**Home**

This section is the first page the user sees when logging in to FusionPro. It displays a live dashboard with Account and Service Plan information. The Home page also hosts Dealer News, the Clare Controls RSS feed. This feed contains the latest news, updates, and important notices.

*Figure 1: Home (FusionPro dashboard)*
**Accounts**

The Account section hosts a list of accounts (user projects) created in the company. Accounts are created and managed from this page.

*Figure 2: Accounts*

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**Companies**

The Companies section hosts company information. The parent/main company is displayed at the top of the page and sub-companies are listed below. This section allows for the creation and management (creating staff, configuring alarm reporting and two-way calling numbers, and account filters) of companies.

*Figure 3: Companies*
Help Center

The Help Center section links out to the Clare Controls Help Center. The Help Center hosts a wide variety of information for the panel and Clare Controls.

Figure 4: Help Center
User/Staff login creation

Once a dealer registers with Clare Controls, they are sent a welcome email containing instructions and a link to create their FusionPro user login. After creating an account, the dealer company admin has access to staff, accounts, sub-dealers, the ability to provision security panels, and create filters for account lists.

To create a FusionPro user account:
1. Access the welcome email, and then click the link.
2. Click Sign Up with email/google/facebook/apple.
3. Follow the prompts for account sign up. Each sign-up method varies. Once signed in, the user sees the dashboard.
4. Continue to Staff management.
Companies and sub-companies

The company is the dealer’s primary account in FusionPro. The dealer may have sub-companies added under the company account. Once sub-companies are added to the company account, the dealer or company admins can modify that sub-company’s information and settings. Both company and sub-companies have access to their own list of Central Stations and the Account View Filters features.

Sub-company management

Dealers directly manage their sub-company accounts.

Note: Central stations and filters are unique to each company/sub-company. If the main company has multiple sub-companies, each sub-company has their own custom list of central stations and filters. Nothing is carried over from the main company or other sub-companies.

Note: Adding companies is not necessary if your organization is a single company. Click Edit on the “My Company” header to edit your company.

To add a sub-company:

1. Click Companies, and then click Add Companies.

The Add Company wizard displays.
2. Enter the sub-company Company name, set the parent company, and then click **Next**.

![Add Company](image1)

3. Enter the sub-company Company Admin's Email, First Name, Last Name, and then click **Next**.

![Add Company](image2)

4. Verify the displayed sub-company information, and then click **Activate**.

![Add Company](image3)
The sub-company Company Info tab displays.

5. Enter the sub-company’s Basic information (Billing Contact, Billing Address, and Shipping Contact) as desired.

To modify a sub-company:
1. Click **Companies** in the side menu.
2. Locate the desired company, and then click **Edit**.

3. Change the desired information, and then click **Save**.
To delete a sub-company:

Note: Sub-companies cannot be deleted if they have staff members or accounts assigned to them.

1. Click **Companies** in the side menu.

![Companies menu](image)

2. Locate the desired dealer, and then click **Delete**.

![Confirm delete pop-up](image)

The confirm delete pop-up displays.

Note: Companies cannot be deleted if there are associated accounts for staff members.

3. Click **Delete**.
Staff management

The main company is created by Clare Controls, sub-companies are created by the company admin. Once the main company account is created, staff members should be added and configured.

Staff members are FusionPro users associated with the company and have specific permissions.

To add staff:
1. Click **Companies**, and then click **Edit** next to the desired company.
   
   **Note:** If this is the main company, click **Edit** next to the company name in the banner.

2. Click the **Staff** tab, and then click **Add Staff**.

3. Enter the staff member’s Contact Info; First Name, Last Name, and Email address.
4. Enter the staff member’s Company Info; company and select the User Type.

**User Types and access**

**Billing Admin:** A Billing admin has access to security plans and billing info.

**Company Admin:** A Company admin has access to their own company, all sub-dealers, and their staff.

**Installer:** An installer has access to create and modify accounts.

**Security Admin:** A Security admin has access to security information and panel provisioning.

5. Click **Create**.

The Staff list displays, and an invitation is sent to the new staff member.
To modify a staff member:

1. Click **Companies**, and then click **Edit** next to the desired company.

![Companies screenshot](image1)

2. Click the **Staff** tab, and then click **Edit** next to the desired staff member.

3. Change the desired information, and then click **Save**.

![Edit Staff screenshot](image2)
To delete a staff member:

1. Click **Companies**, and then click **Edit** next to the desired company.

![Companies tab](image)

2. Click the **Staff** tab, and then click **Delete** next to the desired staff member.

3. The Confirm Delete pop-up displays, click **Delete**.

![Confirm Delete](image)

To resend a staff member invitation:

**Notes**

- If a staff member has not completed their account sign-up and logged in, the **Created Login** field remains blank. If they have successfully created their account, **Yes** displays in the field. If it is blank, the staff member may be modified and sent another invitation.

- If a staff member has issues logging in or submitted the wrong email, correct the email as needed, and then resend the invitation.
1. Click Companies, and then click Edit next to the desired company.

2. Click the Staff tab, and then click Edit next to the desired staff member.

3. Click Resend Invite.

   – Or –

   Make any desired staff member changes, click Save, and then click Resend Invite.
Company Settings management

The company and sub-companies each have access to a Company Settings tab. This tab allows the management of Alarm Reporting Numbers and Two-Way Calling Numbers. Each company should create a list of commonly used Alarm Reporting Numbers and Two-Way Calling numbers for easy security monitoring service activation. Once these numbers are added to the company/sub-company account, installers can simply select the number/plan from an existing list.

The Company Settings tab hosts the Alarm Reporting Number and Two-Way Calling Numbers.

**Alarm Reporting Number:** The number that the panel uses for alarm reporting.

**Two-Way Calling Number:** The number that the panel calls when an Emergency button is pressed. This allows for 2-way communication.

Notes

- The main company’s alarm reporting numbers, two-way calling numbers, and customer lists are not carried over to any sub-company accounts. Each company and sub-company’s numbers/lists are created independently.

- All phone numbers used in the following examples are made up. Do not use the sample numbers when configuring the alarm reporting or two-way calling numbers.

- Alarm reporting and two-way calling numbers cannot currently be modified. If there is an error in the saved information, the entry must be deleted, and a new number must be created. Once the new number is created, each customer account must be updated to use the correct station/number.

- Two-way calling numbers are only available on accounts using a ClareOne panel and the Interactive Plus LTE security plan.

To add an Alarm Reporting Number:

1. Click the **Companies** menu item, and then click **Edit** next to the desired company.
2. Click the **Company Settings** tab, and then click **Edit** next to Alarm Reporting Number.

3. Click **Add Alarm Reporting Number**.

4. Enter the name and phone number, and then click **Save**.
To add a Two-Way Calling Number:

1. Click the **Companies** menu item, and then click **Edit** next to the desired company.

2. Click the **Company Settings** tab, and then click **Edit** next to Two-Way Calling Number.

3. Click **Add Two-Way Calling Number**.
4. Enter the name and phone number, and then click **Save**.

![Edit Company](image)

To add the alarm reporting number to a pre-existing customer account:

**Notes**

- The account must have an online ClareOne or ClareSecure (Helix) panel and use either the Interactive or Interactive Plus LTE security plan.
- If the alarm monitoring/two-way calling number is created before adding a new account, the numbers are selectable in a drop-down field when activating security for the account.

1. Click **Accounts**, and then tap **View** next to the desired account.
2. Click **Service Plans**, scroll to view Monitoring Services, and then tap **Edit**.
3. Click the **Alarm Reporting Phone Number** drop-down, select the desired number, and then click **Save**.

**Note:** Complete other required monitoring information.

![Activate Monitoring Services form](image)

**To add the Two-Way Calling number to a pre-existing customer account:**

**Notes**

- The account must have an online ClareOne panel and use the Interactive Plus LTE security plan.
- When using the two-way calling feature, the cellular must be activated first. Once cellular is active, the caller ID number becomes available for the Monitoring Services form. Activating the cellular is not an instant process, it may take time for the status to update.
- If the Central Station is created before adding a new account, when activating security on the account the central station is selectable in a drop-down field.

1. Click **Accounts**, and then tap **View** next to the desired account.
2. Click **Service Plans**, scroll to view Two-Way Calling, and then tap **Edit**.

![Two-Way Calling](image)

3. Click the **Two-Way Calling** drop-down, select the desired number, and then click **Save**.

![Two-Way Calling](image)

**Account View Filter management**

It is recommended that the company/sub-company create a list of account view filters to help identify and categorize customer accounts. The filters are unique and can be used to denote things like the community name, pet warnings, or if the home requires a gate key.

**Notes**

- Account view filters are unique to the company/sub-company. Filters created in the main company account are not carried over to sub-company accounts.
- When using multiple filters at once, the filters function as an OR search. For example, selecting a neighborhood and animal warning, it displays all results with that neighborhood **OR** with an animal warning.
- Filters are a 2-part process, creating the filter and associating it with an account. See the following sections: “To create account view filters” and “To apply account view filters.”
To create account view filters:
1. Click the **Companies** menu item, click **Edit** next the desired company, and then click the **Account View Filters** tab.

![Edit Company](image)

—or—

Click **Accounts**, view the desired account, and then click the **Filters** tab.

![Accounts View Filters](image)

2. Click **Add Account View Filters/Add Custom Account View Filters**.

![Edit Company](image)
3. Enter the desired filter name, and then click **Save**.

The filter is added to the filter list.

**To apply account view filters:**

1. Click the **Accounts** menu item, and then click **View** next to the desired account.

2. Click the **Filters** tab, select the desired filters, and then click **Apply**.
To use account view filters:

1. Click the **Accounts** menu item, and then click the **filter** icon.

   ![Accounts menu with filter icon highlighted]

   A list of all filters displays.

2. Select the desired filters.

   ![Accounts list with selected filters]

   A list of accounts with those filters displays.
Account management

Once a company has created their staff and (optional) sub-companies, they can add accounts. Each account contains specific customer information (service plans, devices, actions, test, onboarding, and filters).

Account creation

Create an account for each smart home controller. Once the account is created, it can be managed from FusionPro.

Notes

- Once created, accounts cannot be deleted.
- Once an account is created and onboarding is finished, an email is sent to the account owner (homeowner) inviting them to create a login for the ClareHome app. This login allows them access to customization and configuration of their home project.

To create an account:

1. Click **Add Account** on the FusionPro dashboard.

   – Or –

   Click **Accounts**, and then click **Add Accounts**.
2. Enter the customer’s email address, first name, last name, phone number, and (optional) account number, and then click **Next**.

**Note:** The Account Number field can be used to match dealer designated account numbers and is not required.

3. Enter the customer's address, and then click **Next**.

**Notes**

- After entering the street address and ZIP code, the form populates the country and state information.
- In some instances, the address must be modified. The user must tap **Cancel** on the address search results pop-up, and then configure the information manually.
4. Confirm that the correct address is displayed in the map and listed beneath the map, and then click **Save**.

**Note:** The address information is pushed to the ClareOne panel to validate and set the correct time zone.

5. Enter the project’s UUID, and then click **Save Controller**.
   – Or –
Click the box and use the webcam/phone camera to scan the QR code on the ClareOne panel’s label.

**Note:** This is the preferred method for adding the panel to the account.

6. Modify the account to add additional details and provision the account’s security panel.

**Modifying an account**

Once an account is created, the account can be modified to add service plans and provision the panel. The account sub-menu hosts the link to Legacy Fusion, and the account’s Summary, Customer Information, Service Plans, Devices, Actions, Test, Onboarding, and Filters tabs.

**To modify an account:**

1. Click **Accounts** in the side menu.

2. Locate the desired account in the list, and then click **View**.
Summary tab

The account Summary tab hosts the current account information at-a-glance. This tab displays the number of devices and actions in the project, the current service plan; cellular, Wi-Fi, and OVRC status; account information, system information, and the account contact fields.

Figure 5: Summary tab

On the Summary tab, the user can access shortcuts to add devices and Actions and update the selected service plan. The Summary tab also hosts the user’s access to OvrC.
To connect to OvrC:

1. Click **Open OvrC**.

2. Log in using the project’s credentials.

See *Using OvrC with the ClareOne Panel Tech Bulletin (DOC ID 1981)*.
Customer Information tab

The Customer Information tab contains in-depth information on the customer’s account, hosting the account contact, address, locations users, and added customer notes.

Figure 6: Customer Information tab

Note: This tab features the Location Users list. This list contains all users connected to the system. This allows the homeowner the security of knowing who is connected or has access to their system. This feature is currently only available to companies and will become available to homeowners in a future release or FusionPro.
To add customer notes:
Feature coming soon.

To modify customer notes:
Feature coming soon.

To modify the address information:
1. Locate the **Address** field, and then click **Edit**.

The Address Info pop-up displays.

2. Change the desired information, and then click **Save**.
To send coordinates to ClareHome:

**Note:** This feature allows the installer to push the latitude and longitude to ClareHome, ensuring that their schedules based on sunrise and sunset function properly.

1. Locate and click the **Send Coordinates to ClareHome** button.
Service Plans tab

The Service Plan tab hosts the service plan selection or the currently selected service plan. On this tab, technicians and admins can select or view the plan.

When selecting an Interactive Plus or Interactive Plus LTE service plan, this page also hosts in-depth security information including the security device, cellular, and monitoring service. Using the Interactive Plus Plans, a user can view security device events, activate the panel’s cellular, and link the customer’s monitoring service.

Figure 7: Service Plans tab
To add a service plan:

1. Click the **Service Plan** tab, and then select the desired account plan.

<table>
<thead>
<tr>
<th>Service Plan</th>
<th>Basic</th>
<th>Interactive</th>
<th>Interactive Plus</th>
<th>Interactive Plus LTE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smart Home Control</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>(Access, lighting,</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>music, cameras, Z-Wave, automations, scenes, etc.)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Security Notifications</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>In-App Security</td>
<td></td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Control</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Secure Connection to</td>
<td></td>
<td>✓</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Central Station</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>LTE Cellular Failover</td>
<td></td>
<td></td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Two-Way Voice with</td>
<td></td>
<td></td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Central Station</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Basic:** The lowest tier service plan. This plan grants the user access to remote control of their smart home devices. This plan does not provide the ability to connect to a central station for active security monitoring.

**Note:** The Basic option does not allow a user to control or see security from their mobile device.

**Interactive:** The lowest paid tier service plan. This plan grants the user access to remote control of their smart home devices and self-monitoring security devices. This plan does not provide the ability to connect to a central station for active security monitoring.

**Interactive Plus:** A paid service plan. This plan grants the user access to remote control of their smart home devices and provide the ability to connect to a central station for active security monitoring over a broadband connection.

**Interactive Plus LTE:** The top tier paid service plan. This plan grants the user access to remote control of their smart home devices and provides the ability to connect to a central station for active security monitoring over a broadband connection with cellular fail-over.
2. Click **Continue**, and then click **Confirm** to save the plan.

3. **(Interactive Plus and Interactive Plus LTE plans only)** The user is prompted to activate monitoring services.

**Notes**
- The dealer must establish an account with a call center before attempting to configure monitoring services on the panel.
- All security information is case sensitive.
  a. Tap **OK**.

  ![Security Monitoring Not Activated](image)

  A service plan is selected, but security monitoring activation is incomplete. Please enter the central station information.

  **Security Monitoring Not Activated**
  A service plan is selected, but security monitoring activation is incomplete. Please enter the central station information.

  **a.** Enter the central station and customer information, and then click **Save**.

  ![Activate Monitoring Services](image)

  **Activate Monitoring Services**
  - **Select an alarm reporting number**
  - **Caller ID PhoneNumber**

  **Call:**
  1-941-555-5555

  **CS Account Number**
  Your account number with the Central Station (CS)

  **CS Auxiliary Number**

  **MAC Address**
  

  **Serial Number**
  

  **Do not send Arm/Disarm events to CS. Unchecking this box may generate higher costs with your CS.**

  **Save**
Note: Once monitoring services are active, all alarms will be relayed to the central station. Do not activate this service if testing sensors.

Central Station (CS) Receiver Phone Number: The central station’s phone number used to monitor the account.

Caller ID Phone Number: The customer’s phone number to which the caller ID is traced. This appears on the central station’s phone system and used to contact the customer.

Note: For the ClareOne panel, the caller ID phone number is the phone number of the cellular chip, if activated.

CS Account Number: The Central Station account number associated with the customer.

CS Auxiliary Number: The backup alarm delivery number if the CS has provided one, not required.

MAC Address: The ClareOne panel’s MAC address. This is a prepopulated field that cannot be edited.

Serial Number: The ClareOne panel’s serial number. This information is added automatically when scanning the QR to add the controller. If the QR code was not scanned, this information must be entered manually. The serial number is found on the panel’s label, or on the ClareOne panel’s About page.

Do Not Send Events Check Box: This check box is selected by default. It prevents delivery of arm/disarm events to the central station (open/close reports). Uncheck this box to send these events to the central station. This check box can be modified at any time by editing the service plan.

To modify a service plan:

Note: The Basic service plan is the default for all created accounts.

1. Click Update Plan on the account summary tab.
Click the **Service Plan** tab, and then click **View/Edit Plan**.

![Image of service plan](image)

The Plan Options pop-up displays.

2. Select the desired plan, and then tap **Continue**.
3. Verify the new options are displayed, and then click **Confirm**.
To view security events:

**Note:** Security events displays the last 20 events. This is not a full list of security events and is only meant to be used for real-time security event relay verification.

1. Click **View Events**.

![Security Event Communication Log](image)

The Security Event Communication Log pop-up displays a list of recent security device events sent to our central station relay server from the security panel.
To activate cellular:

Notes

- Only the Interactive Plus LTE plan supports cellular.
- Cellular activation is not instant. It may take some time for the cellular status to update.

1. Click the **Service Plan** tab, locate Cellular Service, and then click **Edit**.

The Edit Cellular Service popup displays.

<table>
<thead>
<tr>
<th>Edit Cellular Service</th>
</tr>
</thead>
<tbody>
<tr>
<td>ICCID</td>
</tr>
<tr>
<td>IMEI</td>
</tr>
<tr>
<td>ZIP Code</td>
</tr>
</tbody>
</table>

**Note:** If the panel’s QR code was scanned, this information is pre-populated.

2. Enter the account’s cellular information, and then click **Check Status**.

  If the status is not active, click **Activate**.

**Note:** The cellular information is found on the panel’s back label and on the panel’s About page under LTE.
To deactivate cellular:

1. Click the Service Plan tab, locate Cellular Info, and then click Edit.

![Edit Cellular Service popup](image)

The Edit Cellular Service popup displays.

2. Click Deactivate.

Note: LTE device deactivation is limited to 2 times in a 180-day period.

Devices tab

The Devices tab hosts the list of devices in the Clare Home account, including the ClareOne panel. The list displays the device name, category, type, area, and status. Devices can be managed, added, and removed from the account on this tab. For a full list of supported devices, see ClareOne Panel Supported Devices Product Bulletin (DOC ID 1939).

Figure 8: Devices tab
To add a ClareOne Security Zone:

1. Locate the ClareOne panel in the devices list, and then click **Edit**.

2. Scroll down to view the panel's settings, and then click **Add Security Zones**.
The adding screen pop-up displays.

3. Trip the zone.
4. Enter a name for the zone, and then click **Save**.

5. Make additional changes to the zone as desired.

**Notes**

- Do not modify the zone settings unless familiar with security settings and features.
- The zone settings, excluding the name, save automatically when modified.
To add a Z-Wave device:

1. Click the **Devices** tab, and then **Add Devices**.

2. Select the device category and then the device type.

3. Click **Add a Z-Wave Device**, and then click **Start Discovery Mode**.
A popup displays waiting for a notification from the device, pair the Z-Wave device according to the manufacturer’s instructions for each device.

![Looking for new device](image)

**Note:** Each device has custom configuration and pairing steps, for information on the configuration/pairing of a specific device see that device’s release note available on the Clare Controls Help Center.

https://www.clarecontrols.com/helpcenter

4. Once the device is added, change the name and area as desired. If the device has adjustable settings, they can be modified on this screen.

![Nygma - 61 Gardens](image)

5. Tap **Save**.

The device is added to the ClareOne Panel’s device list.

![Nygma - 61 Gardens](image)
To add a ClareVision Plus camera:

**Note:** To add the cameras to the project, the cameras must have been configured and connected to the same local network as the ClareOne panel or ClareHome. They must also be configured according to the ClareVision or Luma installation instructions.

1. Click **Add Devices**, and then click **Cameras**.

   Discovered cameras are displayed.

2. Select the checkbox next to the desired camera.

   – or –

   **Click Select All.**

   **Note:** If the cameras have different username/password information, they must be added individually.

3. Enter the camera’s username and password, and then click **Add Devices**.
To add a device that requires account verification (MyQ, Lyric):

Notes

- The device must be registered/subscribed to a service on the manufacturer’s website before it can be authorized for use with Clare. See the specific device documentation available on the Clare Controls Help Center.
- The following example walks a user through adding MyQ. See other devices, see their specific documentation.

1. Click Add Devices, and then browse to Chamberlain – MyQ Garage Door.

   Add Device > Access > Chamberlain – MyQ Garage Door

2. Read through the displayed Device Authorization, and then click Authorize Device.

   The Chamberlain authorization page displays.

3. Enter the MyQ credentials, and then click Authenticate.

   Once the device(s) are authorized, a success message displays.

4. All openers associated with the MyQ account are now available in the device list.

To edit a device:

1. Locate the desired device in the Devices list, and then click Edit.
2. Make the desired changes, and then click **Save**.

To remove a device:

1. Locate the desired device in the Devices list, and then click **Delete**.

   – Or –

   Click **Remove Z-Wave** in the top-right corner.
2. Read through the displayed information, and then click **Start Removal Mode**.

![Start Removal Mode](image)

3. A popup displays waiting for a notification from the device, press the Z-Wave button.

The device no longer displays in the Devices list.

To modify the ClareOne panel's settings:

1. Locate the panel in the devices list, and then click **Edit**.

![Devices List](image)

2. Change the name/area, and then click **Save**.

![Device Settings](image)
– or –

Modify the desired security panel settings.

Notes

- Do not modify the security settings unless familiar with security settings and features.
- The security settings save automatically when adjusted.
To reset the Master/Installer PIN:

1. Locate the panel in the devices list, and then click **Edit**.

2. Scroll down to view the panel's PINs.
3. Enter the desired Master/Installer PIN, confirm it, and then click **Save**.

**Note:** The Master PIN is never displayed in FusionPro once it is saved.

**Actions tab**

The Action tab hosts a list of actions associated with the project through Clare Home. The list displays the action name, type, and enabled/disabled status. The user can add and remove actions on this tab.

**Figure 9: Action tab**
To add Actions:

1. Click the **Actions** tab, and then **Add Actions**.

   ![Add Actions](image1)

   – or –

   Click **+Add Action** on the account summary tab.

   ![Add Action](image2)

2. Name the Action, and then select the “When This Happens”.

   **A Scene Tile is Pressed**: This Action uses a UI tile to cause an action, this option creates a Scene.

   **A Time of Day Passes**: This option uses time to create a Schedule.

   **A Device Action Occurs**: This option uses a device action as a trigger, creating an automation.

   ![Select When This Happens](image3)
3. Select the “Do This” action.

4. Click **Save**.
To edit Actions:

1. Click the **Actions** tab, and then **Edit** next to the desired action.

2. Make the desired changes, and then click **Save**.
To remove Actions:

1. Click the **Actions** tab, and then **Delete** next to the desired Action.

2. Click **Delete** to confirm.
**Test tab**

The Test tab hosts a list of tests which can be run from the ClareOne panel. A future release of FusionPro will enable testing from this page.

*Figure 10: Test tab*
Onboarding tab

The Onboarding tab provides a list of tasks to be checked off before inviting the customer to use their ClareHome system. Once all the tasks are marked off, the Send Customer Invitation button becomes available. Clicking the Send Customer Invitation button sends an email to the customer inviting them to sign up and start using their ClareHome application.

![Onboarding tab](image)

Filters tab

The Filters tab features a list of custom account view filters. These filters can be added to projects to help the company search and organize their accounts.

See Account View Filter management on page 21.

![Filters tab](image)
Help Center
The Help Center links out to the full Clare Controls Help Center.

Figure 13: Help Center menu item

Figure 14: Clare Controls Help Center
Contact information

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