

Getting Started in Data Fusion.

After creating your profile and logging in, please follow these steps to get you running as smoothly as possible.

Go to settings:



1)

Multi Stores

Activate/deactivate add and remove stores as required.

Stores Master				
+ Add New Store				
Code	Description	Allow Receiving	Allow Picking	Active
FG	Finished Goods	☒	☒	☒
RM	Raw Materials	☐	☐	☒
WIP	Work In Progress	☐	☒	☒

2)

Company Master


 Settings

Company Details

Company Name	Data Fusion Demo	Sage Company ID	11961
Contact Person	Russell	Contact email	russell@manifolds.co.uk
Tel 1		Tel 2	

Item Quantity - decimal places

Auto Update Sage on Picking Complete	☐	Auto Generate Sage Tax Invoices	☐
Use Lot Tracking	☒	Lot Tracking Advanced	☐
Use Auto Manufacture	☐		
Use Produce Weights (for deliveries, shipping etc)	☐	Sage field name used for Unit weight	NumericUserField1
Use Picking Slip Tracking	☐		
Use Pack Sizes	☐	Use BarCodes	☐
Module 2 Active	☐		
Module 3 Active	☒	Show Manufacturing Costs On Works Orders	☐
Send Notifications	☒	Testing Mode In Testing Mode, integration with Sage accounting is ONE WAY only. No data is sent TO Sage, but all data FROM Sage is current and refreshed on demand.	☐

No file chosen

Image limitations

Lot Tracking is the most critical selection on this screen, to be decided and selected BEFORE synchronising stock. Only select Lot tracking if you are 100% certain it is a requirement.

Try leaving as many of the other features unchecked initially, as it will simplify system use. They can be altered as users become more familiar with using Data Fusion.

3)

[Import Opening Balances From Sage To Stores](#)

Carefully check all option checkboxes to filter out to the list you want displayed. The system will show you Sage on hand as well as Data Fusion on hand.

Fusion					
Find Description/Category		☐ Limit to Sage Zero Balances ONLY ☐ Show Zero Balances ☐ Show Mis-matched Only			
Code	Description	Category	On Hand (Sage)	On Hand (Data Fusion)	Select All
643044	Green universal cushions		214.00	211.00	☐
639795	High chair cover	Chairs and Cushions	218.00	12.00	☐
639801	Multi purpose wipes		201.75	106.75	☐
149554	Orange bicycle	Bicycles	177.00	143.00	☐
149553ZZ	Yellow stroller with green wheels		234.00	297.00	☐
311066	Stroller cover - Blue	Chairs and Cushions	10 298.00	10 298.00	☐
311073	Chair cushion Orange	Chairs and Cushions	130.00	95.00	☐
618127	Green chair with brown piping	Chairs and Cushions	64.00	52.00	☐
31040	Ultimate chair with wheels		84.00	34.00	☐
608920	Plastic bike with big wheels	Bicycles	166.00	42.00	☐
152669	Silver ball with yellow dots		194.00	188.00	☐

Select the items you want to synchronise, and the store so sync to:

Find Description/Category		☐ Limit to Sage Zero Balances ONLY ☐ Show Zero Balances ☐ Show Mis-matched Only			
Code	Description	Category	On Hand (Sage)	On Hand (Data Fusion)	Select All
643044	Green universal cushions		214.00	211.00	☒
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149553ZZ	Yellow stroller with green wheels		234.00	297.00	☐
311066	Stroller cover - Blue	Chairs and Cushions	10 298.00	10 298.00	☐

[Move to Store](#)

[Update Opening Balances Now](#)

Stock levels of selected items will now match.

For users without Manufacturing/BOM requirements, this is sufficient to begin using Data Fusion as a single user.

Please see Creating and setting up BOMs for users who require this feature.