Data Fusion Workflow Guide

A guide to stock management and workflow for new users

Introduction

Welcome to Data Fusion. This guide has been written for new users who are setting up and using Data Fusion for the first time.

Data Fusion was built specifically to fill two important gaps that Sage does not cover:

- **Multi-store stock management.** Sage does not support the ability to manage stock across multiple stores or warehouses. Data Fusion adds this capability, allowing you to receive, track, and manage goods across different locations.
- **Receiving & stock movement.** When goods arrive from a supplier, they are received into a specific store in Data Fusion. Stock levels are tracked per location, and Sage is automatically updated with the resulting stock movements.

In short, Sage remains your accounting and purchasing platform, while Data Fusion handles everything related to stock movement, warehousing, and store management.

Before you can begin, it is important that your system is correctly configured. This includes setting up your stores or warehouses and your stock items.

⚠ **Important:** Configuration must be completed before you can receive goods or process stock movements. Skipping this step will cause errors later in the process.

Before You Begin — Prerequisites

Please make sure the following has been set up before starting:

- **Sage is installed and connected** to Data Fusion.
- **Stock items have been created** in the system.
- **Stores or warehouses have been set up** to receive and hold goods.

Tip: If you are unsure whether your system is configured correctly, contact your Data Fusion administrator before proceeding.

Key Terms — Glossary

If you are new to this system, the following terms will help you understand this guide:

Term	What It Means
Purchase Order (PO)	A document created in Sage to request and record the purchasing of goods from a supplier.
Goods Received Note (GRN)	A document generated by Data Fusion when goods are received against a PO. It confirms what was delivered and triggers the Sage supplier invoice.
Store / Warehouse	A physical or virtual location where stock is held within Data Fusion. Each store tracks its own stock quantities independently.
Stock on Hand	The current quantity of an item available in a specific store or across all stores combined.
Stock Adjustment	An automatic update to item quantities when goods are received, transferred, or sold.
Inter-store Transfer	The movement of stock from one store or warehouse to another within Data Fusion.
Picking Slip	A document used in Data Fusion to pick and dispatch goods when fulfilling a sales order.
Sales Order	A document created in Sage to record a sale to a customer. The dispatch is handled in Data Fusion.
Average Cost	The calculated average unit cost of an item based on all receiving transactions. Updated automatically when goods are received.

Who Does What — Sage vs Data Fusion

Sage is your accounting system — it handles purchasing and sales. Data Fusion extends Sage by adding multi-store stock management. The table below shows where each task takes place:

Task	Sage	Data Fusion
Create a Purchase Order (PO)	✓	
Edit a Purchase Order (PO)	✓	
Receive goods against a PO		✓
Track stock across multiple stores		✓
Transfer stock between stores		✓
Create a Sales Order	✓	
Create and fulfil a Picking Slip		✓
Process supplier invoice payment	✓	
View stock on hand per store		✓

⚠ **Important:** Purchase Orders can only be received in Data Fusion — they cannot be created or edited there. Always create and edit POs in Sage first.

The Full Workflow

Follow the steps below in order. Each step builds on the previous one. Do not skip ahead.

1	**Create a Purchase Order** All purchasing starts with a Purchase Order (PO) created in Sage. The PO is the official record of goods being ordered from a supplier and is the starting point for receiving those goods into your stores.	Sage
2	**Receive Goods Against the PO** Data Fusion automatically retrieves the PO from Sage. You receive the goods into a specific store, entering the quantities delivered. Once complete, a GRN is generated and stock levels are updated in both Data Fusion and Sage automatically.	Data Fusion
3	**Stock Is Available Per Store** Once goods are received, stock is available in the store it was received into. Data Fusion tracks quantities per location, giving you full visibility of what is where across all your warehouses.	Data Fusion
4	**Transfer Stock Between Stores (if needed)** If stock needs to move from one location to another — for example, from a receiving warehouse to a retail store — an inter-store transfer is processed in Data Fusion. Both store balances are updated automatically.	Data Fusion
5	**Process a Sale** Sales are initiated by creating a Sales Order in Sage. Once confirmed, the picking and dispatch process moves to Data Fusion.	Sage
6	**Create and Fulfil a Picking Slip** A Picking Slip is created in Data Fusion against the Sales Order. This records which items are picked from which store and dispatched to the customer. Stock levels are reduced accordingly.	Data Fusion

Understanding Multi-Store Stock Management

One of the key advantages of Data Fusion is the ability to manage stock across multiple stores or warehouses — something Sage cannot do on its own.

How It Works

- Each store has its own independent stock balance for every item.
- When goods are received, you choose which store they go into.
- When a Picking Slip is fulfilled, stock is deducted from the specific store items are picked from.
- Sage always reflects the combined total stock across all stores.

Why This Matters

Without Data Fusion, Sage shows only a single combined quantity per item — with no visibility of where that stock actually is. Data Fusion gives you the full picture, store by store, while keeping Sage in sync with the combined total at all times.

> **Tip:** Always double-check the store selected when receiving goods or fulfilling a Picking Slip. Stock is tracked per location, so selecting the wrong store will result in incorrect balances.

Common Mistakes to Avoid

New users often run into the following issues. Being aware of these will save you time:

- **Receiving goods into the wrong store.** Always double-check the store selected when receiving. Stock will be tracked per store and incorrect entries are difficult to reverse.
- **Creating a PO in Data Fusion.** This is not possible. Purchase Orders must always be created in Sage first.
- **Not completing the GRN.** If the Receive & Generate GRN step is not finalised, stock levels will not be updated and no Sage invoice will be created.
- **Skipping configuration.** Stock items and stores must be set up before you begin. Attempting to receive goods without proper configuration will result in errors.
- **Processing payment in Data Fusion.** Supplier invoice payment is handled in Sage — not in Data Fusion.

Getting Started — Training Resources

Please complete the training documents in the order listed below. They are available at:

https://mydatafusion.online/learningCenter.aspx

1. Getting Started in Data Fusion — System Setup
2. Receiving Goods Against a Purchase Order
3. *Managing Stock Across Multiple Stores (Coming Soon)*
4. *Creating and Fulfilling a Picking Slip (Coming Soon)*

Need help? If you get stuck at any point, visit the learning centre link above or contact your Data Fusion system administrator for support.