



Manufacturing Workflow Guide

A step-by-step guide for new users

Introduction

Welcome to Data Fusion. This guide has been written for new users who are setting up and using the manufacturing features in 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.
- **Manufacturing.** Sage does not handle any form of manufacturing process. Data Fusion bridges this gap by allowing you to create Works Orders, consume raw materials, and produce finished goods — all while keeping Sage 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 manufacturing.

Before you can begin manufacturing, it is important that your system is correctly configured. This includes setting up your stores or warehouses, your stock items, and your Bills of Materials (BOMs). Once this is done, you will be ready to create Works Orders and begin converting raw materials into finished goods.

⚠ Important: Configuration must be completed before any Works Orders can be created. 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 the manufacturing workflow:

- **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.
- **Bills of Materials (BOMs) have been configured** for each product you manufacture.

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 manufacturing or 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.
Bill of Materials (BOM)	A list (or 'recipe') of all the raw materials and components needed to manufacture one finished product.
Works Order	The official instruction to begin a manufacturing run. It records what is being made, what materials are needed, and tracks the process.
Works Order Fulfilment	The step where you record the actual quantities of materials used during manufacturing. This is when stock levels are updated.
Store / Warehouse	The physical or virtual location where stock is held within the system.
Raw Materials	The items purchased and received that will be used (consumed) during the manufacturing process.
Finished Goods	The completed products that result from the manufacturing process, ready to be sold.
Picking Slip	A document used in Data Fusion to pick and dispatch goods when fulfilling a sales order.
Stock Adjustment	An automatic update to item quantities in the system when goods are received, manufactured, or sold.



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 and manufacturing. The table below shows you where each task takes place:

Task	Sage	Data Fusion
Create a Purchase Order (PO)	✓	
Edit a Purchase Order (PO)	✓	
Receive goods against a PO		✓
Create a Works Order		✓
Fulfil a Works Order (record manufacturing)		✓
Create a Sales Order	✓	
Create and fulfil a Picking Slip		✓

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

The Full Manufacturing Workflow

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

1

Create a Purchase Order Sage

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.

2

Receive Goods Data Fusion

Data Fusion automatically retrieves the Purchase Order from Sage. You then receive the goods against that PO into a specific store. Because Sage does not support multiple stores, all store and warehouse management is handled entirely within Data Fusion. Once receiving is completed, stock levels are updated in both Data Fusion and Sage automatically.

3**Create a Works Order** Data Fusion

Once goods are in stock, you can begin the manufacturing process. A Works Order is created to instruct the system on what is being manufactured. Think of it as the official instruction to manufacture — it tells the system which raw materials to use and what finished product will be produced.

4**Fulfil the Works Order** Data Fusion

This is where the actual manufacturing conversion takes place. You record the quantities of raw materials consumed during production. At this point: finished (manufactured) goods are added to stock, raw materials used are removed from stock, and both Data Fusion and Sage are updated with the same stock adjustment transactions.

5**Finished Goods Are Ready** Data Fusion

Once the Works Order is fulfilled, the finished goods are available in the relevant store and ready to be sold.

6**Process a Sale** Sage + Data Fusion

Sales are initiated by creating a Sales Order in Sage. You then create and fulfil a Picking Slip in Data Fusion to pick and dispatch the goods to the customer. Depending on your company's configuration settings in Data Fusion, a Tax Invoice may be automatically generated at this point.

Common Mistakes to Avoid

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

- **Not setting up BOMs before creating a Works Order.** The system requires a Bill of Materials to be linked to any item you plan to manufacture.
- **Receiving goods into the wrong store.** Always double-check the store selected when receiving goods. Stock will be tracked per store.
- **Not fulfilling the Works Order.** If the Works Order is not fulfilled, stock levels will not be updated. Manufactured goods will not appear in stock and consumed materials will not be removed.
- **Creating a PO in Data Fusion.** This is not possible. Purchase Orders must always be created in Sage first.
- **Skipping configuration steps.** Stock items, stores, and BOMs must all be configured before you begin. Attempting to manufacture without proper configuration will result in errors.



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 with Manufacturing and BOMs](#)
2. [Creating Bill of Materials \(BOMs\)](#)
3. [Creating a Works Order for Manufacture](#)
4. [Fulfilling a Works Order — The Conversion Process](#)

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