



Company Configuration

A guide to the Company Details settings screen and what each option controls

Introduction

Company Configuration (Settings → Company Details) is where the day-to-day behaviour of Data Fusion is switched on or off for your business — from Sage automation and lot tracking, to which mobile receiving modes are available, to how bin/location codes are named. Most of these settings are yours to change at any time; a small number are controlled by Data Fusion, as they relate to paid modules.

Before You Begin — Prerequisites

- Access to Company Details is normally restricted to company administrators.
- Changing some settings (e.g. Use Lot Tracking, Use Auto Manufacture) affects how other screens behave — read the notes below before switching them on for the first time.



Company Details

Setting	What It Does
Company Name / Sage Company ID	Read-only — these identify your company and its Sage connection, and are set up by Data Fusion when your account is created.
Contact Person / Contact Email / Tel 1 / Tel 2	Your company's contact details, editable at any time.
Company Image	Upload a logo to display in the app (.png only, 200kb limit).

Sage Automation

Setting	What It Does
Auto Update Sage on Picking Complete	Automatically updates Sage with a "Ready To Invoice" message as soon as a picking slip is fully picked. Useful if a different person/team generates the Tax Invoice.
Auto Generate Sage Tax Invoices	Automatically generates the Tax Invoice in Sage as soon as a picking slip is marked complete.

Lot Tracking

Setting	What It Does
Use Lot Tracking	Turn this on if your raw materials have a shelf life and you want to track which lot numbers are allocated to which orders.
System-Generated Lot Numbers	On: the app auto-creates lot numbers, and scanners/mobile devices can receive stock directly. Off: users enter their own lot numbers, and receiving must be done on the web.



Scanner / Mobile Receiving Modes

Three independent switches controlling which goods-in tiles appear on the mobile/scanner dashboard: Count & Check (scanner counts, the web posts the receipt), Direct Receive (scanner receives straight into stock), and Put-Away (scanner relocates stock already received). See the Mobile/Scanner Version guide for the full detail on how each mode works.

Bin / Location Naming

An optional naming convention for granular, bin-level locations — Bin ID Segments (e.g. Warehouse, Aisle, Row, Bin, up to 4 levels) plus a Segment Separator, producing a structured code such as WH1-A03-R2-B05. See the Multiple Stores & Bin/Location Flexibility guide for full detail.

Manufacturing & Stock Settings

Setting	What It Does
Use Auto Manufacture	Simplifies and speeds up fulfilling Works Orders — auto-fulfil with one click and stock adjusts accordingly. Best suited to a single-warehouse operation without lot tracking.
Use Produce Weights	Turn on if you need item weights for deliveries/shipping. You'll also specify the Sage field name that holds the unit weight (e.g. NumericUserField1).
Use Picking Slip Tracking	Useful if your business does warehousing or straight picking of stock without needing to track lot numbers.
Use Pack Sizes	Turn on if you sell products in different pack sizes — enter a pack code on a picking slip and the correct quantity populates automatically.
Show Manufacturing Costs On Works Orders	Displays manufacturing cost information directly on the Works Order screen.
Mobile Module Active	Turns the mobile/scanner app on or off for your company.
Send Notifications	Turns on system notifications for your company.

⚠ Important: Turning on Use Auto Manufacture switches off Lot Tracking and reduces you to a single store — you'll be asked to confirm this before it takes effect.



Settings Controlled by Data Fusion

A small number of settings on this screen are not yours to change directly — they relate to paid modules or to how your data integrates with Sage, and are switched on or off by Data Fusion on request.

Setting	What It Does
Module 2 Active	Unlocks Sales Forecasting and Job Cards. Contact Data Fusion to have this switched on or off.
Module 3 Active	Unlocks Works Orders, production recording, BOM and Kits management. Contact Data Fusion to have this switched on or off.
Barcode Module Active	Enables barcode scanning across the app. Contact Data Fusion to have this switched on or off.
Testing Mode	While active, integration with Sage is one-way only — data flows in from Sage as normal, but nothing is sent back to Sage. Set by Data Fusion, typically during initial setup or testing.

Common Mistakes to Avoid

- **Expecting to switch on Module 2, Module 3, Barcode Module, or Testing Mode yourself.** These are controlled by Data Fusion — contact us to change them.
- **Turning on Use Auto Manufacture without reading the warning.** It will switch off Lot Tracking and limit you to one store.
- **Switching off System-Generated Lot Numbers without telling your warehouse team.** It moves lot-numbered receiving to the web only — scanners can no longer receive.