



Downloadable Documents

Every core document can be downloaded, so you can run part of your workflow manually whenever you need to

Introduction

Every core business document in Data Fusion — Receiving Notes, Sales Order Delivery Notes, Picking Slips, Works Orders, Warehouse Transfers, and Stock Count sheets — can be downloaded directly from the screen you're working on. This means your workflow is never fully locked into the system: if you need a paper copy for a driver to sign, a warehouse team without a device, or you simply prefer working from a printed sheet, a downloadable version is always available.

Key Terms — Glossary

Term	What It Means
Print Preview	The button used on most documents to generate and view a downloadable PDF copy.
Download	Used specifically for the Stock Count sheet, which downloads as a spreadsheet rather than a PDF.



Where This Happens

Document	Button	Format
Receiving / Goods Received Note	Print Preview	PDF
Sales Order Delivery Note	Delivery Note	PDF
Picking Slip	Print Preview	PDF
Works Order	Print Preview	PDF
Warehouse Transfer	Print Preview	PDF
Stock Count sheet	Download	Excel spreadsheet (one tab per store)

Understanding Why This Matters

Having a downloadable version of every core document means a business can run part of its workflow manually whenever it needs to — print a picking slip and have someone pick from paper, print a Goods Received Note for a driver to sign, print a Works Order for the shop floor, or hand a warehouse team a printed Stock Count sheet instead of a device.

Note: Printing a document is simply producing a copy — it does not, by itself, move stock or update Sage. The underlying transaction (receiving, picking, transferring, manufacturing) still needs to be completed on screen as normal. The one exception is the Stock Count sheet, which is specifically designed to round-trip: download it blank, count on paper, and upload it back in — see the Stock Counts guide for full detail.

Common Mistakes to Avoid

- **Assuming a printed document updates stock or Sage automatically.** It doesn't — printing just produces a copy; the transaction itself still has to be completed in Data Fusion (except the Stock Count sheet, which is built to be re-uploaded).
- **Losing track of documents run manually.** Once a document is printed, it exists outside the system — it's up to your business to control and reconcile any paper copies in use.