Receiving Module Guide

A step-by-step guide for new users

Introduction

The Receiving module in Data Fusion is used to process the physical arrival of goods against a Purchase Order (PO). When a supplier delivers, you use this screen to confirm what arrived, assign goods to the correct warehouse, and generate a Goods Received Note (GRN).

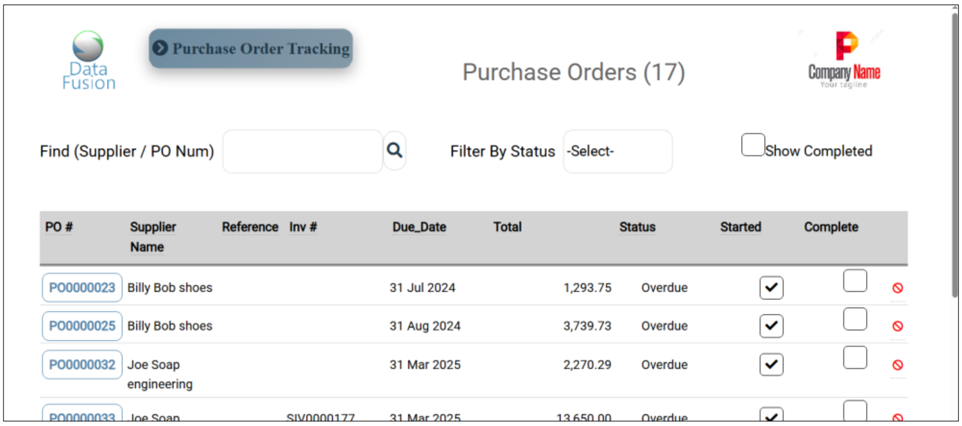
When you finalise a GRN, Data Fusion automatically:

- Updates stock quantities in the relevant warehouse.
- Creates an Unpaid Supplier Invoice in Sage Accounting.
- Records lot / batch numbers where applicable.

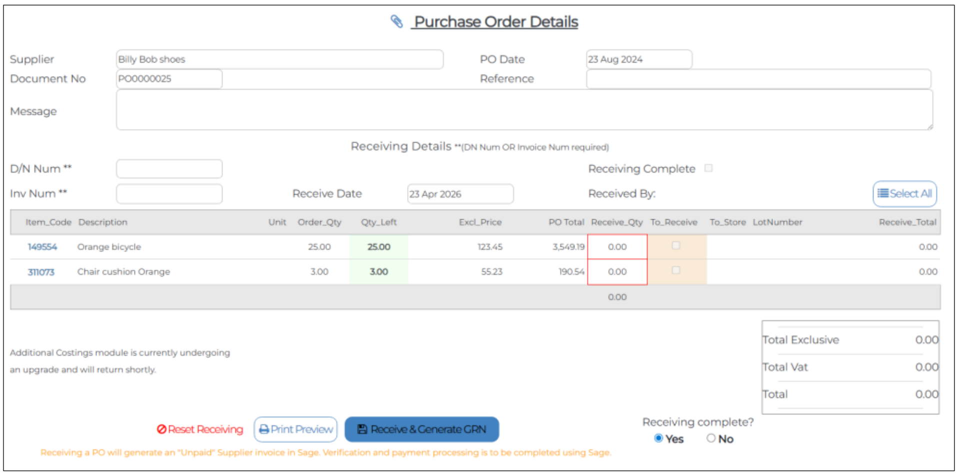
⚠ **Important:** Payment of the Supplier Invoice is completed in Sage — not in Data Fusion.

Getting to the Receiving Screen

1	From the main menu, go to Outstanding Purchase Orders.
2	Find and click the Purchase Order you want to receive against.
3	The Receiving screen will open, linked to that specific PO.



Screen Overview



The screen has four main areas:

- **PO Header (top)** — read-only details pulled from the Purchase Order.
- **Receiving Details** — fields you complete for this delivery (D/N number, date, etc.).
- **Line Items Grid** — one row per ordered item; this is where you confirm quantities received.
- **Totals Panel (bottom right)** — live summary of the value being received.

Key Fields to Complete

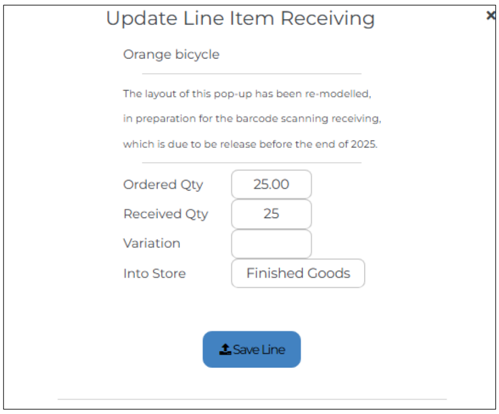
Field	Description
D/N Num **	Delivery Note number from the supplier. Required — minimum 3 characters.
Inv Num **	Supplier invoice number, if available at time of receiving.
Receive Date	Date goods are received. Defaults to today.
Receiving Complete?	Radio button at the bottom — Yes (fully received) or No (more deliveries expected).

Note: At least one of D/N Num or Inv Num must be filled in before you can generate the GRN.

Receiving Items — Step by Step

Receiving a Single Line

1	In the grid, click the blue Item Code of the item you are receiving. A pop-up will open.
2	Enter the quantity physically received in the Received Qty field.
3	Select the correct warehouse from the Into Store dropdown.
4	If lot tracking is enabled for this item, enter the Lot Number.
5	Click Save Line. The pop-up closes and the grid updates.
6	Repeat for each line item on the order.



Receiving All Lines at Once

If everything on the PO has arrived in full and is going into one warehouse, use Select All.

1	Click the Select All button (top right of the grid, shown in red).
2	In the pop-up, choose the destination store and click OK.
3	All inventory lines are set to their full ordered quantity automatically.

Tip: Use Select All for straightforward full deliveries. Use the individual line method when quantities vary or items go to different warehouses.

Partial Deliveries

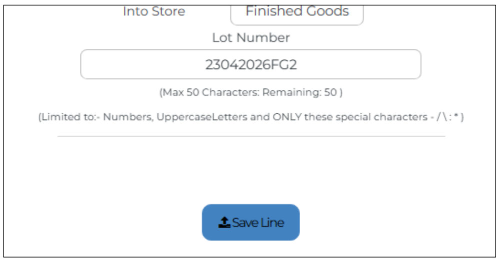
Simply enter the quantity that actually arrived — less than the ordered amount — on each line. Set Receiving Complete? to No so the PO stays open for future deliveries.

Note: The PO will remain in Outstanding Purchase Orders until it is fully received and closed.

Lot Number Tracking

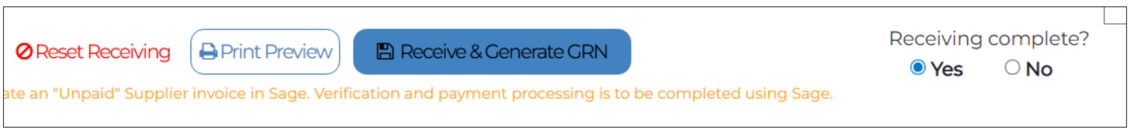
If your company uses lot tracking, a Lot Number field appears in the line item pop-up for tracked items. Enter the batch number from the supplier's documentation.

- Maximum 50 characters. Letters, numbers and - / \ : * only.
- Must be unique — the system will warn you if the number already exists.
- Optionally capture a Use By Date and a free-text Lot Note.



Finalising — Generate the GRN

1	Review the Totals Panel (bottom right) — confirm the values look correct.
2	Set Receiving Complete? — Yes if fully received, No if partial.
3	Click Receive & Generate GRN (green button, bottom of screen).
4	Confirm the prompt. Do not close or refresh the page while processing.
5	A success message will show the Sage Supplier Invoice number when complete.



⚠ **Important:** Once the GRN is generated the screen locks. To reverse a completed GRN, contact your system administrator.

Other Features

Print Preview

Click Print Preview to generate a PDF Receiving Slip — a printable internal record of the delivery.

Attachments

Click the paperclip icon (📎) to upload or view documents linked to this PO, such as the signed delivery note or supplier invoice.

Reset Receiving

Clears all receiving data for this PO and reloads the original lines from Sage. Only use this before a GRN has been generated.

⚠ **Important:** Reset cannot be undone. It will delete all quantity entries, store assignments, and lot numbers captured in the current session.

Common Issues

Field	Description
D/N Num error	Enter at least 3 characters in the D/N Num field before generating the GRN.
Invalid store selected	Select a store from the Into Store dropdown — '-Select-' is not valid.
No stores available	Contact your administrator — no stores are configured to allow receiving.
Lot number already exists	The batch number is already in use. Enter a unique lot number.
GRN button is missing	The Receiving Complete checkbox is ticked — this PO has already been processed.
Error sending to Sage	Check your connection and that Sage is accessible, then try again.

Quick Reference Checklist

1	Open the PO from Outstanding Purchase Orders.
2	Enter D/N Num (and Inv Num if available).
3	Confirm the Receive Date.
4	Action each line — qty, store, lot number. OR use Select All for a full delivery to one store.
5	Review the Totals Panel.
6	Set Receiving Complete? to Yes or No.
7	Upload the delivery note as an attachment (recommended).
8	Click Receive & Generate GRN and confirm.
9	Note the Supplier Invoice number from the success message.