Sales Orders — Full Workflow

How a normal, fully-picked Sales Order moves from Sage, through picking, and on to invoice

Introduction

A Sales Order starts life in Sage and flows into Data Fusion so your warehouse team can pick it, and so the picked quantities can be posted back to Sage to generate the invoice. This guide covers the normal, day-to-day journey of a Sales Order that is fully picked in one go — from the moment it appears in Data Fusion, through generating a Picking Slip, to the finished Tax Invoice.

⚠ **Important:** Sales Orders are captured and edited in Sage only. Data Fusion cannot create a new Sales Order, and the order's customer, items, quantities and pricing cannot be changed on the Sales Order screen — this is the same rule that applies to Purchase Orders and Items elsewhere in Data Fusion.

Note: This guide does not cover short-picked lines or back orders. If a line can't be fully picked, see the separate “Part Deliveries and Back Orders” guide, which covers that scenario end-to-end.

Before You Begin — Prerequisites

- The Sales Order must already exist in Sage — Data Fusion only ever displays orders that have synced in from Sage.
- Only Sales Orders containing at least one stock item sync into Data Fusion; a Sales Order made up entirely of service/non-stock lines will not appear.
- Items, customers and stores must already be set up.
- Decide which store the order will be picked from, or leave it open so pickers can pull from any store.

Key Terms — Glossary

Term	What It Means
Sales Order (SO)	The customer's order, captured in Sage, and synced into Data Fusion for fulfilment.
Picking Slip	The fulfilment document generated from a Sales Order that tells the warehouse what to pick, and from which store.
Job Card / Works Order	Alternative fulfilment paths that can be created from a Sales Order instead of a Picking Slip, where the Job Costing or Manufacturing modules are enabled. Not covered in this guide.
Reload	A manual refresh that re-pulls a single Sales Order fresh from Sage, replacing the local copy.
Update Sage SO	Posts the picked quantities, store and lot numbers back to the Sales Order in Sage.
Tax Invoice	The billing document generated in Sage once the picked quantities have been posted.
Delivery Note	A printable PDF summarising what's being delivered, produced from the Sales Order once picking is complete.

Where This Happens

Task	Data Fusion	Sage
Create/edit the Sales Order (customer, items, qty, pricing)		✓
Sync the order into Data Fusion	✓ (automatic)	✓ (source)
View Sales Order details	✓ (read-only)	
Generate a Picking Slip	✓	
Pick and complete the order	✓	
Print a Delivery Note	✓	
Post picked quantities / update the Sales Order	✓ (sends)	✓ (receives)
Generate the Tax Invoice	✓ (triggers it)	✓ (records/issues it)

The Full Workflow

1. The Sales Order is captured in Sage exactly as normal — customer, items, quantities and pricing.
2. Data Fusion syncs the order in automatically. Only orders that include at least one stock item pull through; a pure service/quote-style order won't appear.
3. Find and open the order from the Sales Orders list. Search by customer, SO number or reference, or filter by status, due date or delivery method.
4. Review the order on the Sales Order screen. Customer, delivery address, due date, reference, sales rep and lines are all shown, but read-only — any changes need to be made in Sage.
5. Click “Create Picking Slip” from the Create drop-down. Optionally choose a specific store to pick from, or leave it as “- Any/All -” to allow picking across stores. This creates the Picking Slip and opens it.
6. Warehouse staff pick the order from the Picking Slip and mark it complete once every line is fully picked. (*For a short-picked line, see the Part Deliveries and Back Orders guide.*)
7. Once picking is complete, print the Delivery Note if needed, then click “Update Sage SO” to post the picked quantities back to Sage.
8. Click “Create Sage Tax Invoice” to generate the invoice in Sage — or, if your company has automatic Tax Invoice generation switched on, Data Fusion will offer to do this immediately after the previous step.
9. Once invoiced, the Sales Order's status changes to Invoiced and the record is locked — no further posting or editing is possible from Data Fusion.

Understanding the Sales Order Screen

- **Everything on the Sales Order screen is read-only.** Customer, address, dates, reference, sales rep and line details all come from Sage — to change any of them, edit the order in Sage.
- **Data Fusion keeps incomplete orders refreshed automatically.** The background sync updates header and line details for orders that haven't been picked yet each time it runs, so it should normally reflect Sage without you doing anything.
- **The refresh (reload) icon re-pulls a single order from scratch.** Use it if an order looks out of date — but only before picking has started (see Common Mistakes below).
- **“Re-open for editing” is a safety net.** If a picking mistake is spotted before the Tax Invoice is generated, this unlocks the order again so it can be corrected.
- **Job Cards and Works Orders are alternative paths.** If your company uses the Job Costing or Manufacturing modules, the Create drop-down may also offer “Create Job Card” or “Create Works Order” instead of a Picking Slip — these follow their own separate workflows.

Common Mistakes to Avoid

- **Trying to create or edit a Sales Order in Data Fusion.** It can't be done — Sales Orders are captured and changed in Sage only, then synced in.
- **Using Reload after picking has already started.** This deletes the linked Picking Slip and its progress and re-pulls the order fresh from Sage — only use it before a Picking Slip has been generated.
- **Expecting a service-only Sales Order to show up in Data Fusion.** If none of its lines are stock items, it won't sync in at all.
- **Trying to delete a Sales Order that already has a linked Picking Slip or Job Card.** Data Fusion blocks this — remove or complete the linked Picking Slip/Job Card first.