



Works Orders — Creating & Manufacturing

From creating a Works Order through to manufacturing (“manufacturing a BOM”), including Auto-Manufacture and Part Manufacture

Introduction

A Works Order is how Data Fusion manages manufacturing or production — from ordering a finished good, through to consuming (“backflushing”) the raw materials that make it and putting the finished item into stock. Some people call this “manufacturing a BOM”, since a finished good is usually built from a Bill of Materials (BOM). This guide covers the whole journey: creating a Works Order, manufacturing it, and the two features that speed this up — Auto-Manufacture and Part Manufacture.

Before You Begin — Prerequisites

- Works Orders requires Module 3 to be active on your company.
- If a finished good is built from a Bill of Materials, that BOM must already exist — see the BOMs guide.
- If you plan to use Auto-Manufacture, it must be switched on in Company Configuration, and — because it auto-selects stock without per-lot selection — it's only available to companies not using lot tracking.



Key Terms — Glossary

Term	What It Means
Works Order (WO)	The document that records what you intend to manufacture, for which customer/reference, and by when.
Finished Good line	A line on the Works Order for the item you're producing — as a plain Item, or exploded "From BOM" / "From Kit".
Raw Material requirement	The components needed to build a finished-good line, generated automatically when that line is set to "From BOM" or "From Kit".
Backflush	Consuming (drawing) the raw materials from stock at the same time the finished good is produced.
Draw-from store	The single store Auto-Manufacture draws every component from, when filling a line automatically.
Part Manufacture	Producing less than the full ordered quantity in one go, splitting the remainder into a new, still-open balance.

Where This Happens

Task	Handled By
Create the Works Order and finished-good lines	Data Fusion (Works Orders)
Allocate raw materials and manufacture	Data Fusion (Works Order Fulfillment)
Update stock and average cost	Data Fusion
Update Sage's item quantities/average cost	Sage (posted automatically when you manufacture)

Part 1 — Creating a Works Order

1. Go to Works Orders and click Add New Works Order. Fill in the Customer, Reference, Due Date, an optional Linked Document number, and Notes.
2. Add a finished-good line: choose Item, From BOM, or From Kit, then select the item/BOM/kit code and the quantity to produce.
3. If the line is From BOM or From Kit, Data Fusion automatically explodes it into its raw-material requirements. Click the book icon on the line to review them — this popup also shows each component's On Hand quantity and any Short amount, so you can see straight away whether you have enough stock to fulfil it.
4. Save the Works Order. It can be printed (Print Preview) at any point.

Note: This raw-material explosion is what people usually mean by “manufacturing a BOM” — choosing a BOM-based finished good automatically pulls in everything needed to build it.

Part 2 — Manufacturing (Works Order Fulfillment)

Once a Works Order exists, it's manufactured from Works Order Fulfillment. Each finished-good line appears as its own section, with a grid underneath listing everything needed to build it.

5. Open the Works Order under Works Order Fulfillment.
6. For each finished-good line, fill in the Use Qty (and Scrap, if any) for every raw-material row, along with which store to draw it from and, if applicable, the lot number.
7. Tick a line's Complete checkbox once you're ready to manufacture it.
8. Click Transfer Items To Stores and Update Sage. This is the actual manufacture step: it draws the raw materials out of stock, produces the finished good into stock, and updates Sage — all in one action.

⚠ Important: Only lines ticked Complete are processed. If a Works Order has more than one finished-good line, you can manufacture them one at a time, or all together — whatever isn't ticked Complete stays untouched and open for later.

You'll also be offered the option to update the finished good's Sage selling price at the same time, if its cost has changed as a result of this manufacture.

Understanding What Happens Financially

When you manufacture, Sage receives two kinds of postings in the same action: the finished good is adjusted in (a positive stock movement, at its rolled-up cost from the components used), and every raw material drawn (and any scrap) is adjusted out (a negative movement, at that component's own cost). This is what “backflushing” means in practice — the components disappear from stock and the finished good appears, at the same moment, driven by one action.



Auto-Manufacture

Auto-Manufacture speeds up the allocation step above by filling in the raw-material grid for you, instead of typing in every quantity and store by hand.

9. Switch on Use Auto Manufacture in Company Configuration (only available to companies not using lot tracking).
10. On the Fulfillment screen, choose a Draw-from store at the top — only stores flagged as a WIP (work-in-progress) store can be selected.
11. Click the Auto-Manufacture button on a finished-good line. Data Fusion checks that the draw-from store has enough of every single component to fully cover this line.
 - **If everything is covered:** every component row is filled in automatically — quantity and store — ready for you to review and manufacture.
 - **If anything is short:** nothing is filled in. You're told exactly which components are short and by how much, so you can address that first (e.g. manufacture a sub-assembly, or transfer more stock in).

Note: This is an all-or-nothing check — Auto-Manufacture will never partially fill a line. It only fills the grid; you still click Transfer Items To Stores and Update Sage yourself to actually manufacture.

Part Manufacture

Part Manufacture lets you produce less than the full ordered quantity in one go — useful when you can't (or don't want to) make the whole order at once.

12. On an open finished-good line, open Part Manufacture and enter the Quantity to make now.
13. If you enter less than what's remaining, the line splits in two: a batch line for the quantity you're making now, and a new balance line for what's left — both with their raw-material requirements scaled proportionally.
14. Allocate (manually or via Auto-Manufacture) and manufacture the batch line as normal, via Transfer Items To Stores and Update Sage — this releases that batch's finished goods into stock, ready to be picked and invoiced, while the balance line stays open.
15. Repeat against the balance line next time you produce more. The Works Order's status shows Partially Manufactured until every batch has been made.

A few related tools support this:

- **Entering the full remaining quantity (or more):** no split happens — the line is simply rescaled. Entering more than what's remaining is treated as an over-supply and handled the same way.
- **Reset Lines:** undoes any splits that haven't been manufactured yet, consolidating them back into one line. Batches already manufactured are left exactly as they are.
- **Close Remaining:** closes out and completes the Works Order early, abandoning whatever quantity is still outstanding, while keeping everything already manufactured. Only available once at least one batch has been made — if nothing has been manufactured yet, delete the Works Order instead.



Common Mistakes to Avoid

- **Forgetting to tick a line's Complete checkbox.** Only ticked lines are manufactured when you click Transfer Items To Stores and Update Sage — everything else is left untouched.
- **Expecting Auto-Manufacture to partially fill a short line.** It won't — if any component is short at the draw-from store, nothing is filled until the shortfall is resolved.
- **Using Close Remaining to cancel an order nothing has been made against.** Use Delete on the Works Orders list instead — Close Remaining is for finishing off an order that's already partially manufactured.
- **Manufacturing the same Works Order twice.** Once a line (or the whole order) is complete, it locks and can't be processed again — this also protects against accidental double-clicks or two people manufacturing the same order at once.