

Transfer reasons

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A transfer reason is a named reference value maintained in Warehouse settings.

Review and

maintain the names available for transfer-related warehouse work.

Open the **Transfer Reason** configuration list from Warehouse settings.

If you need to...	Go to
Reach the list and recognise its controls	Find the transfer-reason list
Understand the list and its editable field	Understand the list and form
Add, edit, or remove a name	Add, edit, and remove a transfer reason
Decide what to do when access or list size changes	Handle access and list-size variations
Resolve a validation or deletion message	When maintenance does not work
Maintain another warehouse reference list	Service types or Stock withdrawal

Before you start

The list and its maintenance actions depend on the subscription and access available to

your account. Have the name you want to maintain ready before you open the form.

Prerequisites

- Your subscription includes the configured feature. When it does not, the list area is replaced by the subscription-upgrade area.
- You have access to the actions available on this page. Creation, editing, and deletion can each be controlled independently.

- You know the transfer-reason name you want to add or change.

Find the transfer-reason list

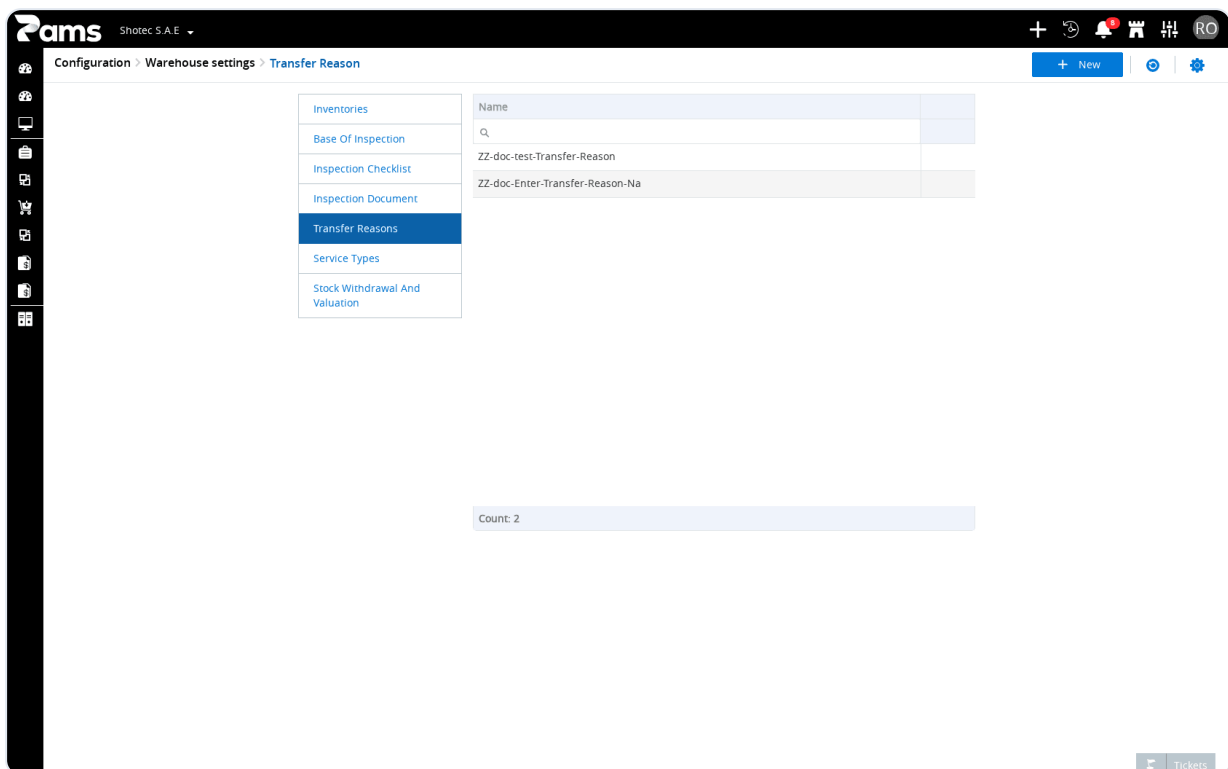
The transfer-reason list is the Warehouse settings page headed **Transfer Reason**.

The

list shows one visible column, **Name**, and the page controls **New**, **Refresh**, and **Settings**.

Steps

1. Open the **Transfer Reason** list from Warehouse settings.
2. Confirm that the page heading is **Transfer Reason**.
3. Confirm that the list contains the **Name** column.
4. Locate **New**, **Refresh**, and **Settings** on the page.



Result: The Transfer Reason list is on screen with its **Name** column and page controls available according to your account.

Understand the list and form

The list identifies each reference value by **Name**. The form contains the same reader-facing

field for a new or edited value. The list layout can determine which columns you see, so use the headers displayed in your list rather than looking for hidden record fields.

What you see or enter	What it is used for
Name	The transfer-reason name shown in the list and entered in the form.
Name column	The visible list column for the reference values.

The list also carries system fields for ordering, record identification, and company association, but those fields are hidden from the list and form.

Add, edit, and remove a transfer reason

Maintain the reference names through the available add, edit, delete, or export action. The list must be available, and the action you need must be available to your account.

Prerequisites

- You are on the Transfer Reason list.
- For a new value, **New** is available.
- For an existing value, its edit action is available.
- To delete a value, more than one record must remain after deletion.

Add a transfer reason

Prerequisites

- **New** is available.

Steps

1. Select **New**.
2. Enter the transfer-reason name in **Name**.
3. Select **Save**.
4. If the form reports `Name is required`, enter a name in **Name** and select **Save** again.

Result: The new value is saved and the page displays `Data saved Successfully`.

Edit a transfer reason

Prerequisites

- An existing value has an available edit action.

Steps

1. Select the edit action for the value you want to change.
2. Replace the value in **Name**.
3. Select **Save**.

Result: The changed value is saved and the page displays `Data updated Successfully` .

Delete a transfer reason

Prerequisites

- More than one record remains in the list.

Steps

1. Select the delete action for the value you want to remove.
2. Review `Are you sure you want to delete this item?` .
3. Select **Delete**.

Result: The value is deleted and the page displays `Data Deleted Successfully` .

Export the list

Prerequisites

- The export action is available.

Steps

1. Select **Export**.
2. Choose the required export format.
3. Select one option from the table.

If you need to...	Select
Confirm the export	Export
Close the export window	Cancel

Result: The export window closes after your selection.

Handle access and list-size variations

Your available path depends on what PAMS exposes for your account and on how many records are in the list.

What you encounter	Path to take
The configured feature is included	Work from the list and use the actions available to you.
The configured feature is excluded	Use the subscription-upgrade area shown in place of the list.
New is hidden	Open an existing value only if its edit action is available.
The edit action is unavailable	Review the list without editing the value.
The delete action is unavailable	Review the list without deleting a value.
More than one record exists	Use the delete action when it is available.
One record or no records exists	Keep the remaining value; the delete request is not sent.

Steps

1. Choose one applicable path from the table.

If...	Do this
The configured feature is included	Open the Transfer Reason list and use the available action.
New is available	Select New to add a value.
The edit action is available	Select the edit action for the value you want to change.
The delete action is available and more than one record remains	Select the delete action for the value you want to remove.
One or no records exists	Keep the remaining value and do not select Delete .

Result: You use the available maintenance path without attempting an unavailable action or removing the last value.

When maintenance does not work

Use the message text on screen to choose the matching action.

Message	What to do
Name is required	Enter a name in Name , then select Save .
Forbidden characters detected. Please remove them and try again.	Remove forbidden characters from the filter, then apply the filter again.
Are you sure you want to delete this item?	Select Delete to continue or Cancel to leave the value unchanged.
Must have at least one item	Keep the remaining value; deletion cannot proceed when it would leave no item.
Related to Saved data, Can't be deleted	Keep the value and resolve the saved-data relationship before trying again.
Failed to Delete	Keep the value and retry the deletion after checking that the delete action is available.
Do you want to save your changes?	Choose the save or leave-page option shown by the dialog.
Step 1 - Download the blank template	Follow the numbered import step shown by the import dialog.
Step 2 - Fill the template with your data and save the file on your computer	Follow the numbered import step shown by the import dialog.
Step 3 - Upload your data into Pams	Follow the numbered import step shown by the import dialog.
Step 4 - Choose one of the importing options	Follow the numbered import step shown by the import dialog.

After maintaining transfer reasons

After a successful save or deletion, return to the list and check the **Name** column for the resulting entry. The page's list refreshes after a successful save or deletion.

If you need another warehouse reference list, continue with [Service types](#) or [Stock withdrawal](#). For operational warehouse work, continue with [Warehouse fulfillment flow](#).