Configuring Warehouses And Areas

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Prepare the Warehouse Configuration

Before creating any warehouse records, make sure you are signed in with access to the **Configuration** area and the warehouse-related lists. You need permission to add, edit, save, archive, or delete records where those controls are available. If you can view **Inventories**, **Areas**, or **Inventory Model** but cannot create or save a record, ask the person responsible for Pams users and roles to confirm your access.

In Pams, set up warehouse information in this order:

- A **Warehouse** is the main operational site where goods are received, stored, inspected, prepared, or released for shipment.
- An **Area** is a defined part of that warehouse. Areas help the team identify where products are located or which operational stage they are in.
- An **Inventory Model** is a reusable warehouse definition. Use it when several warehouses follow the same structure or operating pattern.

Use these Pams pages during setup:

What you are setting up	Pams page	Use it to
Main warehouse sites	**Inventories**	Create and maintain warehouse records
Warehouse areas	**Areas**	Define areas and connect them to the correct warehouse
Reusable warehouse structures	**Inventory Model**	Maintain common warehouse definitions for repeated use

Collect the information your team has already agreed before you start:

- The warehouse **Name**
- The identifier or code used to distinguish the warehouse in operational records
- The warehouse’s operational purpose, such as receiving, storage, or shipment preparation
- The areas that warehouse needs

- Whether the warehouse should use an existing **Inventory Model** or requires a new one

[SCREENSHOT: Configuration area showing the Inventories, Areas, and Inventory Model options]

Avoid creating duplicate warehouse names or area names. Clear names make it easier for warehouse, purchasing, sales, and delivery teams to select the correct location during receiving, storage, transfer, and shipment work.

Create a Warehouse

Create the warehouse record before creating its areas. The warehouse record is the parent record that groups all related areas under one operational site.

1. In the **Configuration** area of Pams, open **Inventories**.
2. Open the warehouse list and select the control used to create a new warehouse record.
3. Enter the warehouse **Name**. Use the name your team recognizes in daily operations. This name should clearly distinguish the site from other warehouses, branches, or storage locations.
4. Enter the warehouse identifier or code used by your organization. Use the approved identifier consistently, especially if warehouse records are referenced in receiving, storage, shipping, or transfer work.
5. Review the available warehouse details and complete the fields that describe the warehouse's operational purpose. Keep this information aligned with how the warehouse will be used by the team.
6. If the warehouse follows a reusable setup, select the appropriate **Inventory Model**. A model helps you apply a common warehouse structure instead of setting up each comparable warehouse independently.
7. Click **Save**. If you have finished entering the warehouse information and want to return to the warehouse list, use **Save and Close** where it is available.
8. Return to the **Inventories** list and find the warehouse you created. Open it again to confirm that the **Name**, identifier or code, and **Inventory Model** are correct.

[SCREENSHOT: New warehouse form showing the Name, identifier or code, and Inventory Model selection]

Do not create areas until the warehouse record has been saved. The saved warehouse must be available before Pams can associate each area with the correct parent warehouse. If the warehouse does not appear in the list after saving, check whether the record is shown as archived or whether a list filter is hiding it.

Define Areas Within a Warehouse

Areas represent the parts of a warehouse that operators need to recognize during their work. Define areas clearly so products are associated with the right warehouse location and operational stage.

1. Open the warehouse you created from the **Inventories** list. Access its area-management option or its **Warehouse Areas** list where available.
2. Select the control to create an area record.
3. Enter the **Area Name** or identifier that warehouse operators will use. Choose a name that makes the area's purpose immediately clear to the people receiving, storing, inspecting, or preparing products for shipment.
4. Select the parent **Warehouse**. Confirm that the selected warehouse is the site where this area actually exists. An area must be connected to its correct warehouse so it does not appear as an option for the wrong site.
5. Save the area record with **Save**, then return to the warehouse's area list to verify that the area is displayed.
6. Repeat the process for each area required by the warehouse design. Create separate records rather than combining several activities under one broad area name.

Depending on your organization's physical layout and operating process, your warehouse may use distinct areas for:

- Receiving products from a supplier or purchase order
- Awaiting Inspection
- Storage for products that are **In Stock**
- Picking or packing products for a delivery
- Staging products that are **Released for Shipment**
- Dispatching products through shipping orders or delivery notes

[SCREENSHOT: Warehouse Areas list for one warehouse, showing several separately named areas]

Use names that match the language your warehouse team uses every day. For example, if products move from receiving to inspection and then to storage, create separate areas for those stages. This makes the warehouse structure easier to follow when reviewing stock, receiving purchased goods, or preparing delivery work.

Create and Maintain Warehouse Models

Use **Inventory Model** to maintain a reusable definition for warehouses that share the same basic structure. This is useful when your organization has multiple comparable warehouses, branches, or operating sites and wants each one to start from the same agreed setup.

1. In the **Configuration** area, open **Inventory Model**.
2. Open the model list and select the control for creating a new model.
3. Enter a model name that explains the warehouse structure or operating pattern it represents. Use a name that helps other administrators choose the correct model when they create a warehouse.
4. Review the warehouse-level details and area definitions available on the **Inventory Model** form. Complete the details that Pams presents for the model, including the area structure that should be reused.
5. Click **Save** to keep the model. Use **Save and Close** if you want to return to the model list after completing the setup.
6. When you create a comparable warehouse in **Inventories**, select this **Inventory Model** so common warehouse and area settings are applied consistently.

[SCREENSHOT: Inventory Model form showing the model name and reusable area definitions]

Keep model names specific enough to prevent the wrong model being selected. For example, distinguish a model intended for a warehouse with receiving, inspection, storage, and shipment activities from a model intended for a simpler storage-only site.

When editing an existing **Inventory Model**, first review the warehouses already associated with it. Pams may use the model as a starting point when a warehouse is created, while existing warehouses may already have their own saved areas and details. Before making a change, confirm with the warehouse team whether the new definition is intended only for future warehouse creation or whether current warehouse records also need separate updates.

Do not rely on a model change alone to correct an existing warehouse. Open the related warehouse and its **Warehouse Areas** list to confirm the live setup used by operations.

Keep Warehouse and Area Records Accurate

Warehouse configuration should reflect the real operating layout. Review warehouse and area records whenever your organization opens a new site, changes storage space, adds an inspection point, or changes the route products follow from receiving to shipment.

1. Open **Inventories** and select the warehouse record that needs to be updated.
2. Review the warehouse **Name**, identifier or code, and **Inventory Model** assignment. Update these details only when the warehouse's approved information or operating arrangement has changed.
3. Click **Save** after making changes. Keep identifiers already used in inventory, receiving, transfer, shipping, or delivery work unless your organization has approved a replacement. Changing a familiar identifier can make historical operational records harder for the team to recognize.
4. Open the warehouse's **Warehouse Areas** list. Add a new area when the physical layout or working process adds a distinct location or stage.
5. Edit an existing area only after confirming its parent **Warehouse**. If an area is moved, renamed, or reassigned, check that the change matches the actual warehouse layout and does not cause operators to select the wrong location.
6. When a warehouse or area is no longer used, use the available archive, inactive, or deletion control only after checking whether it is referenced by stock or operational records. Archived records may be available separately through **Archived** views.

[SCREENSHOT: Warehouse record with its associated Warehouse Areas list and archive status]

Avoid changing one area to represent several unrelated purposes. For example, if a former storage area becomes a shipment staging area while storage continues elsewhere, create or maintain separate area records. Distinct areas support clearer stock handling and reduce confusion during receiving, inspection, storage, transfer orders, shipping orders, and delivery note preparation.

Verify the Warehouse Setup

Verify the warehouse setup before it is used in live receiving, storage, inspection, transfer, or shipment activity. A short review helps prevent products being assigned to the wrong warehouse or area later in the workflow.

1. Open **Inventories** and locate the warehouse record you created or updated.
2. Confirm that the warehouse **Name** and identifier or code match the approved warehouse information. If an **Inventory Model** was selected, verify that the model assignment is the intended one.
3. Open the warehouse record and review its **Warehouse Areas** list. Confirm that every area belongs to this warehouse and that no area has been linked to the wrong parent warehouse.
4. Check that each area has a distinct **Area Name** or identifier. Warehouse operators should be able to tell the difference between receiving, inspection, storage, and shipment-related areas without opening each record.
5. If you used an **Inventory Model**, create or review a test warehouse based on that model where your organization's process allows it. Confirm that the expected warehouse and area defaults are available before relying on the model for additional warehouse records.
6. If a warehouse, area, or model cannot be selected, first confirm that it was saved. Then check its current status, whether it appears under **Archived**, and whether you have the required configuration access.

[SCREENSHOT: Completed warehouse record showing its Inventory Model and the linked Warehouse Areas]

A warehouse setup is ready for operational use when the warehouse is visible in **Inventories**, every required area is attached to the correct warehouse, and the warehouse structure reflects the route products will follow through receiving, inspection, storage, and shipment.

The next configuration step is to set up the controls used when received products are checked. Continue with Configuring Inspection Controls.

Overview

Pams warehouse configuration gives your team a consistent way to identify where products are handled during the purchasing and delivery cycle. The configuration begins with the warehouse record, continues with the areas inside that warehouse, and can be standardized through reusable **Inventory Model** records.

Use a warehouse record to represent an operational site. This is the main record your team recognizes when products are received, held in stock, inspected, transferred, or prepared for shipment. The **Inventories** list is where you maintain these warehouse records.

Use **Areas** to describe the meaningful locations or operating stages within each warehouse. An area might represent receiving, an inspection location, storage, staging, or dispatch. The area must be associated with its parent warehouse so operators can select the correct location during warehouse work.

Use **Inventory Model** when several warehouses need the same starting structure. Rather than defining the same set of warehouse and area details repeatedly, maintain a reusable model and assign it while creating comparable warehouses. This supports consistent setup across branches or locations while still allowing each warehouse record to be reviewed separately.

[SCREENSHOT: Relationship between an Inventory Model, a warehouse in Inventories, and its Warehouse Areas]

Accurate warehouse and area records support the wider Pams workflow:

- Purchased products can be received and tracked in the intended warehouse.
- Products can move through inspection and storage in a defined order.
- Warehouse teams can identify the correct area when preparing shipping orders and delivery notes.
- Sales, purchasing, and operational teams can use consistent location names when discussing product availability and delivery readiness.

This configuration does not replace the operational work of receiving goods, inspecting products, storing stock, or issuing goods. It provides the warehouse and area structure those workflows use. Keep the structure aligned with your real warehouse layout so the records remain practical for daily operations.

Prerequisites

Complete the following before you create or change warehouse, area, or **Inventory Model** records in Pams:

- Confirm that you have access to the **Configuration** area and can open **Inventories**, **Areas**, and **Inventory Model**.
- Confirm that you can use **Save** or **Save and Close** when creating or editing records. If these controls are unavailable, the person responsible for Pams users, roles, or permissions needs to review your access.
- Agree the warehouse **Name** and identifier or code with the warehouse and operations teams before entering the record.
- Identify whether the warehouse is a new operational site, an existing site being updated, or a warehouse that should follow an existing **Inventory Model**.
- Obtain a clear list of the warehouse areas required for the physical layout and daily flow of products.
- Confirm which areas are needed for activities such as receiving, **Awaiting Inspection**, storage, shipment staging, and dispatch.
- Review existing warehouse records in **Inventories** before creating a new one. This helps prevent duplicate records for the same site.
- Review existing **Areas** before adding a new area. Use a new area only when it represents a genuinely separate location or operational purpose.
- Check whether the warehouse or area is already referenced by receiving, stock, transfer, shipping, or delivery work before renaming, moving, archiving, or deleting it.
- If you intend to use an **Inventory Model**, review the model's warehouse-level details and area definitions first. Make sure the model matches the warehouse structure you need.

[SCREENSHOT: Inventories list and Areas list used to check existing warehouse configuration before creating new records]

After these records are in place, configure the checks used for products entering the warehouse in Configuring Inspection Controls.