PAMS (V2 PIPELINE RUN)

Creating Delivery Notes

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Preparing to Create a Delivery Note

Before creating a Delivery Note, make sure the delivery has been coordinated and the correct goods are ready for the customer. Use the delivery plan created during Coordinating Sales Deliveries as your starting point rather than creating a note from incomplete or unconfirmed information.

Check the customer order or other delivery source carefully. The items and quantities on the source must match what is physically planned for delivery. If the customer is receiving only part of an order, identify the exact quantity that will leave now and leave the remaining quantity for a later Delivery Note.

Review these points before you begin:

- Confirm the correct **Client** and the related **Orders** or delivery source.
- Confirm the items that will be delivered, including their **Quantity** and **Unit**.
- Check whether the delivery requires goods to be removed from **Inventory**.
- If goods must leave stock, verify that the required quantity is available in **In Stock** records before you use **Issue Goods**.
- Confirm the delivery destination using the available delivery address or **Delivery Destination** information.
- Gather any delivery instructions, such as the agreed **Delivery Date**, destination details, package information, or carrier details when these are used for the delivery.
- Make sure you can use the **Create Delivery Note**, **Issue Goods**, **Complete Delivery**, and **Print Delivery Activities** actions. If an action is not available, do not try to work around it by creating an inaccurate record.

A Delivery Note should reflect the actual delivery, not simply the full order. Take particular care with partial deliveries, substitutions, and items that remain unavailable. Recording the correct quantities before goods are issued helps Pams keep the order and delivery records aligned.

[SCREENSHOT: Delivery Note preparation showing the related Orders, delivery items, quantities, Delivery Date, and Delivery Destination]

Creating a Delivery Note

Create one Delivery Note for the specific goods and quantities being delivered to the customer. If an order will be delivered in separate shipments, create a separate Delivery Note for each actual delivery rather than combining future deliveries into one record.

1. Open the **Delivery Notes** area in Pams and select **Create Delivery Note**.
2. Choose the related **Orders** or other available delivery source. Check the selected record before continuing. The **Client**, order details, and delivery items should match the delivery you are preparing.
3. Review the delivery lines brought into the Delivery Note. Each line should identify the correct **Item**, **Quantity**, and **Unit** for the goods being sent.
4. Enter or confirm the delivery-specific information. Pay close attention to:
    - **Delivery Date**
    - **Delivery Destination**
    - Delivery address details, when shown
    - Any available delivery instructions or **Note**
    - **Carrier**, **Package**, **Total Weight**, or **Volume (m3)** when these details are used for the shipment
5. If this is a partial delivery, change the delivery quantities so they show only the quantities that are going out in this shipment. Do not leave the full ordered quantity on the note unless the full order is being delivered.
6. Select **Save** to keep the Delivery Note open for review and processing. Use **Save and Close** only when you have finished entering the details and do not need to make further changes immediately.

After saving, reopen or remain on the Delivery Note and read through the header and lines once more. A saved Delivery Note is the record you will use for **Issue Goods**, where required, and for **Complete Delivery**.

[SCREENSHOT: Create Delivery Note page with a selected Orders, delivery lines, Delivery Date, and Delivery Destination]

Reviewing Delivery Lines Before Processing

Review the Delivery Note before selecting **Issue Goods** or **Complete Delivery**. These actions record the delivery activity, so the lines must match what is actually being prepared for the customer.

Start with each delivery line. Compare the **Item** and **Quantity** in Pams with the goods being packed, loaded, or handed over. If the shipment contains several products, check every line rather than confirming only the total number of packages. Also verify the **Unit**, especially where an item may be supplied in different units.

Use the following checks to keep the record accurate:

- Confirm that every listed **Item** belongs to the customer's related **Orders** or selected delivery source.
- Confirm that each **Quantity** is the quantity being delivered now.
- Reduce quantities for a partial delivery before processing the Delivery Note.
- Remove or correct a line that was included by mistake before goods are issued.
- Check that the **Client** and **Delivery Destination** identify the correct recipient and destination.
- Confirm the **Delivery Date** reflects the delivery being recorded.
- Review any **Carrier**, **Package**, **Total Weight**, or delivery instructions that are relevant to the shipment.
- Make sure the Delivery Note does not include goods that are still awaiting shipment, inspection, or storage.

Select **Save** after making any correction. Saving first ensures that the Delivery Note contains the final delivery lines before you take an action that changes stock or records the delivery as complete.

Do not use **Complete Delivery** as a way to reserve goods for a future shipment. The completed note should represent goods that have actually been delivered. If the order has remaining quantities, leave those quantities for the next Delivery Note.

[SCREENSHOT: Delivery Note lines showing multiple items, quantities, units, and delivery destination details ready for review]

Issuing Goods for the Delivery

Use **Issue Goods** when the delivery requires stock to be removed from **Inventory**. This step should be completed only after you have checked the Delivery Note lines against the goods that will leave stock.

1. Open the saved Delivery Note for the shipment you are processing.
2. Review the **Client**, **Delivery Destination**, **Delivery Date**, and every delivery line one final time. Confirm that the **Item** and **Quantity** shown are the exact goods to be issued.
3. Select **Issue Goods**. Pams uses the current Delivery Note, so make sure you are not viewing another customer’s delivery or a previous partial delivery.
4. Confirm the goods issue using the quantities shown on the Delivery Note. Do not issue extra quantities because they are available in stock. Only issue the quantity being delivered to this customer on this Delivery Note.
5. Return to the Delivery Note after the goods issue has been processed. Check the delivery lines again and confirm that the note still shows the correct items and quantities for the delivery.
6. If you discover an error before completing the delivery, correct the Delivery Note while it is still possible to do so. For example, if one package was not loaded, update the relevant **Quantity** before moving on.

Use **Issue Goods** only for deliveries that require goods to leave Inventory. Some delivery records may not require a stock issue. In those cases, complete the Delivery Note only after confirming that the delivery details are accurate and that the delivery can be recorded without issuing stock.

Where goods are not available for the full order, create the Delivery Note for the available quantity only. This keeps the delivery record aligned with the goods that were actually issued and avoids recording an undelivered quantity as delivered.

[SCREENSHOT: Delivery Note with the Issue Goods action highlighted and delivery lines ready for confirmation]

Completing the Delivery and Printing Delivery Activities

Complete the Delivery Note only when the delivery details are final. If the delivery requires **Issue Goods**, make sure that action has been processed before you complete the delivery. Completion should represent the actual delivery activity recorded for the customer.

1. Open the Delivery Note that you reviewed and, where required, processed with **Issue Goods**.

2. Confirm the final delivery information:
    - The correct **Client**
    - The correct **Delivery Destination**
    - The correct **Delivery Date**
    - The items and **Quantity** on every delivery line
    - Any delivery details such as **Carrier**, **Package**, **Total Weight**, or delivery instructions that apply to the shipment
3. Select **Complete Delivery**. Do this only after confirming that the listed goods and quantities are correct. Do not complete a note while you are still waiting for goods to be loaded, dispatched, or confirmed.
4. After completion, select **Print Delivery Activities** to generate the delivery activity output for that Delivery Note.
5. Review the printed result before sharing or filing it. Check that it identifies the correct Delivery Note and shows the goods or delivery activities associated with that record.

The printed delivery activities should match the completed Delivery Note. If the output appears to refer to another delivery, stop and check the Delivery Note number, client, items, and quantities before treating the printout as the delivery record.

For a partial delivery, the printed delivery activities should show only the quantities included on that completed Delivery Note. Remaining quantities should stay on the related Orders until they are delivered through another Delivery Note.

[SCREENSHOT: Completed Delivery Note with Complete Delivery and Print Delivery Activities actions shown]

Fixing Problems When Processing a Delivery

If Pams does not allow you to issue goods or complete a Delivery Note, first return to the note and check the information already entered. Most delivery processing problems can be resolved by correcting the delivery lines or filling in the missing delivery details before trying the action again.

Use these checks when a delivery cannot be processed:

- If **Issue Goods** cannot be completed, review each **Item** and **Quantity** on the Delivery Note. Confirm that the item is valid and that the required quantity is available for issue from **Inventory**.

- If a quantity is too high, reduce the **Quantity** to the amount actually being delivered. Do not issue the full order quantity when only part of the order is available.
- If an item should not be included, correct or remove the delivery line before using **Issue Goods** or **Complete Delivery**.
- If **Complete Delivery** is unavailable or does not finish, check that the required delivery information is present, including the **Delivery Date**, **Delivery Destination**, client information, and delivery lines.
- If the delivery required a stock movement, confirm that **Issue Goods** has been completed for the current Delivery Note before trying **Complete Delivery** again.
- If **Print Delivery Activities** does not show the expected goods or details, confirm that you selected the correct completed Delivery Note before printing.
- If the wrong customer, destination, item, or quantity appears, do not complete the inaccurate Delivery Note. Correct the details first and select **Save**.

Keep partial deliveries separate. If some items remain unavailable, do not force the incomplete quantity into the current Delivery Note. Record only the goods that are ready for this delivery and handle the remaining items through the appropriate follow-up delivery process.

When the issue is caused by a changed customer request, an unavailable item, or another order problem, follow the process in Managing Order Exceptions rather than completing a Delivery Note that does not match the actual delivery.

Overview

A **Delivery Note** records the specific goods and delivery details for a customer shipment in Pams. It connects the delivery activity to the related **Orders** or delivery source and gives your team a clear record of what was delivered, where it was sent, and in what quantity.

The normal delivery flow is:

- Create a Delivery Note from the correct **Orders** or delivery source.
- Review the delivery lines and delivery details.
- Use **Issue Goods** when the delivery requires goods to be removed from **Inventory**.
- Select **Complete Delivery** after the delivery information and quantities are final.
- Use **Print Delivery Activities** for the completed delivery record.

The Delivery Note is especially important when an order is delivered in parts. A customer may receive only some items or quantities today, while the remaining goods are delivered later. In that situation, create the current Delivery Note for the actual quantity being delivered. The related Orders remains the reference for the remaining quantity.

Delivery Notes also help keep customer-facing delivery activity consistent with warehouse activity. The **Item**, **Quantity**, **Delivery Date**, and **Delivery Destination** should all describe the same real-world shipment. Where stock must leave Inventory, **Issue Goods** should use the same delivery lines that will later be completed.

[SCREENSHOT: Delivery Note workflow from Orders through Issue Goods, Complete Delivery, and Print Delivery Activities]

Use the Delivery Note as the delivery record for the shipment itself. Do not use it to record planned quantities that have not yet been delivered, and do not combine different deliveries merely because they belong to the same Orders.

Prerequisites

Before you create or process a Delivery Note, make sure the delivery is ready to be recorded in Pams. The information on the Delivery Note must be based on the actual goods and delivery arrangement, not on an assumption that the entire Orders will be delivered.

You should have the following available:

- A related **Orders** or other delivery source for the customer delivery.
- The correct **Client** and delivery recipient information.
- The intended **Delivery Date** and **Delivery Destination**.
- Confirmed delivery lines showing the correct **Item**, **Quantity**, and **Unit**.
- Confirmation of whether goods must be removed from **Inventory** through **Issue Goods**.
- Availability of the required goods when the delivery includes an inventory issue.
- Any relevant shipment details, such as **Carrier**, **Package**, **Total Weight**, **Volume (m3)**, or delivery instructions, when these are used for the delivery.
- Access to **Create Delivery Note**, **Issue Goods**, **Complete Delivery**, and **Print Delivery Activities**.

Check the related Orders before creating the note. Ensure that the goods being delivered are for the correct customer and that you are recording the quantity that is leaving now. For a partial delivery, prepare the Delivery Note only for the available and confirmed quantity.

If the delivery cannot proceed because goods are unavailable, the customer has changed the request, or the Delivery Note details do not match the shipment, do not complete the delivery record. Continue with Managing Order Exceptions to address the order issue before recording an inaccurate delivery.