

Transferring And Issuing Goods

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Choosing the Right Stock Operation

In Pams, choose the stock operation that matches where the goods are going. The **Operation Type** controls the movement purpose, the locations shown on the form, and the checks you complete before confirming the movement.

Use an **Internal Transfer** when products are moving between locations under your organization's control. For example, you may move products from a receiving area to a storage area, from one warehouse to another, or from available stock to an approved operational-use location. An internal transfer does not issue goods to an external recipient; it records a change in where Pams shows the stock.

Use a **Delivery Order** when products are leaving your organization for an external customer or delivery destination. The delivery record identifies the recipient and confirms which products, quantities, and tracked items have been issued.

The transfer status helps you understand whether the movement can proceed:

Status	What it means	What you should do
Waiting	The requested products are not yet available to reserve from the selected Source Location.	Check the available stock and confirm the correct Source Location.
Ready	Pams has reserved the required quantity, or the movement is ready for confirmation.	Physically move or issue the goods, then review the completed quantities.
Done	The movement has been confirmed and stock has been updated.	Review the completed record and any backorder created for remaining quantities.

For goods used internally, do not create a customer delivery. Instead, use an **Internal Transfer** and select the approved destination for the purpose, such as an operational, production, maintenance, or consumption location. This keeps customer deliveries separate from items used by your own teams.

[SCREENSHOT: Transfer form showing the Operation Type field, Source Location, Destination Location, and movement status]

Before creating a movement, make sure products have already been placed in the appropriate location through the [Stocking and Allocating Products](#) workflow.

Preparing Products and Locations for Movement

Before you create a transfer or delivery, confirm that the product, quantity, and locations match the physical goods you intend to move. A movement can only be completed accurately when Pams can identify both the stock source and the destination.

Start by checking that each product is set up as a stock item and has an on-hand quantity in the intended **Source Location**. If the product is stored in a different warehouse area than expected, selecting the wrong source may leave the transfer in **Waiting** or prevent Pams from reserving the stock.

Use the **Locations** selector to confirm the available choices. Select:

- The warehouse or storage area where the goods are currently held as the **Source Location**.
- The warehouse, storage area, customer delivery destination, or approved internal-use location as the **Destination Location**.
- The correct operational-use location when stock is being consumed by production, maintenance, or another internal department.

Review the product's **Unit** before entering a quantity. The quantity on the movement must use the same stock unit shown for that product. For example, do not enter a quantity intended as individual items if the product is managed in a different unit.

Tracked products require additional attention. If a product uses a **Serial Number**, **lot**, or **Package**, you must be able to identify the exact stock being moved. Open **Detailed Operations** during the movement process to select the required serial number, lot, package, or split quantity.

[SCREENSHOT: Product movement line showing Product, Quantity, Unit, and the Detailed Operations option]

If the available quantity does not match the quantity requested, decide whether to move only the available amount and create a backorder for the rest. Do not increase the completed quantity to match the request unless the goods are physically present in the selected Source Location.

Moving Products Between Internal Locations

Use an **Internal Transfer** to record stock movement between warehouse locations, storage areas, or approved internal-use locations. Complete the record as the goods are being prepared so the locations and quantities can be checked before the physical movement occurs.

1. In Pams, go to **Warehouse > Operations > Transfers** and select **New**.
2. In **Operation Type**, select **Internal Transfer**. Pams displays the movement fields for transferring goods between internal locations.
3. Select the **Source Location** where the products are currently held. Select the **Destination Location** that will receive the products. Check both selections carefully before adding any product lines.
4. Add the products on the **Operations** lines. For each line, select the product and enter the requested **Quantity**. Review the displayed **Unit** to make sure it matches the unit used for the product in stock.
5. Set the **Scheduled Date** if the goods will move later. Use the date to distinguish planned movements from goods that are ready to move immediately.
6. Select **Check Availability**. Pams checks the selected Source Location and reserves the available quantity for the transfer. Review the reserved quantity on each Operations line.
7. Open **Detailed Operations** when you need to select specific lots, serial numbers, packages, or split a quantity across multiple stock entries. Match the selected tracked items to the products physically being moved.

[SCREENSHOT: Internal Transfer record with Source Location, Destination Location, Operations lines, and Check Availability]

When the status changes to **Ready**, take the goods to the Destination Location. Do not validate the movement before the products have physically moved. If stock is not available, leave the record in **Waiting** until stock is replenished, reassigned, or the source location is corrected.

Issuing Goods for Delivery or Operational Use

A **Delivery Order** records goods leaving your organization for an external recipient. An **Internal Transfer** records goods issued for approved internal use. Select the correct option so Pams keeps customer deliveries separate from stock consumed by your own operations.

1. Create a **Delivery Order** when goods are being sent to a customer or other external destination. In the delivery record, select the recipient in the **Contact** field and confirm the **Source Location** from which the goods will be issued.
2. Add each product on the **Operations** lines. Enter the quantity to deliver and review the product **Unit** before continuing. The entered quantity should match the goods prepared for shipment.
3. Select **Check Availability** to reserve stock from the Source Location. If the delivery includes tracked products, open **Detailed Operations** and select the exact **Serial Number**, lot, or **Package** being issued.
4. Review the delivery information before validation. Ensure the selected Contact, Source Location, product lines, and completed quantities all match the physical shipment.
5. For goods used by your organization, create an **Internal Transfer** instead of a Delivery Order. Set the **Destination Location** to the approved operational, production, maintenance, or consumption location.
6. Use the **Notes** or reference field, where it is available, to record information that explains the issue. Record the delivery reference, work order, department, or operational purpose that applies to the movement.

[SCREENSHOT: Delivery Order showing Contact, Source Location, product lines, and Detailed Operations for a serial-numbered product]

Use a Delivery Order only when products have actually been issued externally. If goods are merely moved from a storage location to an internal work area, keep the movement as an Internal Transfer. This distinction makes it easier to review stock by location and trace why products were taken from available inventory.

Validating the Movement and Handling Partial Quantities

Validate a transfer or Delivery Order only after you have confirmed the physical movement and reviewed the quantities completed. Validation updates the stock position, so the quantities shown on the record must reflect what actually moved or was issued.

1. Open the transfer or Delivery Order and compare the requested quantity on each **Operations** line with the quantity physically completed. Check that the selected **Source Location** and **Destination Location** are still correct.

2. If the full requested quantity moved, make sure the completed quantity matches the requested quantity. For tracked products, confirm the lots, serial numbers, or packages shown in **Detailed Operations** match the items handled by the warehouse team.
3. Select **Validate** only after these details are correct. If Pams shows an **Immediate Transfer** confirmation, use it only when the entered completed quantities accurately represent goods that have physically moved.
4. If only part of the requested stock is available or physically moved, enter only the completed quantity. Do not validate the full request when the remainder is still at the Source Location.
5. When prompted, choose whether to create a **backorder**. Create a backorder when the remaining quantity still needs to be moved or delivered later. Do not create one when the uncompleted quantity is no longer required.
6. After validation, confirm that the record status is **Done**. For an Internal Transfer, verify that stock decreased in the **Source Location** and increased in the **Destination Location**.

[SCREENSHOT: Validation confirmation showing the option to create a backorder for remaining quantities]

A completed Delivery Order records the goods as issued from the selected Source Location. A completed Internal Transfer records the same goods in the receiving internal location. Review the completed record immediately if the movement affects a delivery commitment, a project, or an operational-use request.

Resolving Transfer and Issuance Problems

When a transfer cannot be completed as expected, review the movement record before creating a new one. Most issues relate to the selected location, available quantity, or the specific tracked items assigned to the movement.

A transfer in **Waiting** usually means Pams cannot reserve the requested quantity from the selected **Source Location**. Check the product's available quantity in that location. If stock has been replenished or reassigned to the correct location, return to the transfer and select **Check Availability** again. If the goods are physically held elsewhere, correct the Source Location before validating.

For products managed by **Serial Number**, lot, or **Package**, open **Detailed Operations** when Pams does not accept the selected item. Choose a lot or serial

number that has available quantity in the selected Source Location. Check that the serial number on the screen matches the product physically prepared for the movement.

Before validation, you can correct an incorrect location by editing the **Source Location** or **Destination Location** on the transfer. Review the Operations lines again after changing either location, especially if you previously selected **Check Availability**.

After a transfer shows **Done**, do not treat the original record as if the goods are still in the old location. Create a reversing movement to return the goods from the destination back to the original location, then create the correct movement if needed.

When quantities do not match, compare these values on the **Operations** lines:

- Requested quantity
- Reserved quantity after **Check Availability**
- Completed quantity entered before **Validate**
- Remaining quantity shown on any backorder

[SCREENSHOT: Operations lines showing requested, reserved, and completed quantities, with a related backorder]

Use the completed transfer and any backorder together when investigating a short delivery or incomplete internal movement. They show what has already moved and what remains outstanding.

Overview

Pams uses transfers and Delivery Orders to keep the physical location of products aligned with the stock information your team sees. The record you create depends on whether the product stays inside your organization or leaves for an external recipient.

Use **Internal Transfer** when products move between internal locations. Typical examples include moving products between warehouses, from a receiving area to storage, from storage to a production or maintenance area, or to an approved consumption location. The transfer records the selected **Source Location**, **Destination Location**, products, quantities, and any serial number, lot, or package details.

Use a **Delivery Order** when products are issued outside your organization. The delivery record includes the recipient in the **Contact** field, the issuing Source Location,

the products being delivered, and the completed quantities. This provides a clear record of which stock was issued and to whom.

The standard movement sequence is:

- Create the transfer or Delivery Order.
- Select the correct locations and add products on the **Operations** lines.
- Use **Check Availability** to reserve stock.
- Complete **Detailed Operations** for tracked products or split quantities.
- Physically move or issue the goods.
- Review completed quantities and select **Validate**.
- Create a backorder if quantities remain to be moved later.

The status shown on the record indicates where the movement stands. **Waiting** requires stock or location checks, **Ready** indicates the movement can proceed, and **Done** confirms the stock movement has been recorded.

[SCREENSHOT: Transfer list showing movements in Waiting, Ready, and Done statuses]

Accurate transfers support warehouse control, delivery coordination, and project work because Pams shows stock in the location where it is actually held. For customer delivery activities connected to a Orders, see [Coordinating Sales Deliveries](#) and [Creating Delivery Notes](#).

Prerequisites

Before creating an Internal Transfer or Delivery Order, make sure the warehouse information in Pams is ready for the movement. Completing these checks prevents transfers from remaining in **Waiting**, assigning stock from the wrong location, or validating quantities that do not match the physical goods.

- Confirm that the products have been received, inspected where required, and placed into stock. Products that are still awaiting receiving, inspection, or storage may not be available in the location you need.
- Verify that each product has an on-hand quantity in the intended **Source Location**. Check the physical location as well as the quantity shown in Pams before reserving stock.
- Confirm the destination is available in the **Locations** selector. For internal use, ensure you know the approved operational, production, maintenance, or

consumption location to use as the **Destination Location**.

- Check the product **Unit** before entering quantities. The requested and completed quantities must use the unit shown for the product.
- For a Delivery Order, identify the correct recipient before creating the record. Select the appropriate person or company in the **Contact** field and confirm that the delivery is leaving from the correct Source Location.
- For products tracked by **Serial Number**, lot, or **Package**, have the relevant product identifiers available. You will select them in **Detailed Operations** before validation.
- Know whether a partial movement is acceptable. If only part of the stock is available, decide whether the outstanding quantity should remain open as a **backorder**.
- Prepare the reference information needed for the issue, such as a delivery reference, department, work order, or operational purpose, for the **Notes** or reference field where it is available.

[SCREENSHOT: Completed preparation check showing stock availability in the selected Source Location and a tracked product ready for Detailed Operations]

After goods have been transferred or issued, continue with [Managing Returns and Services](#) when products need to be returned or require external service handling.