PAMS V2

Delivery Note

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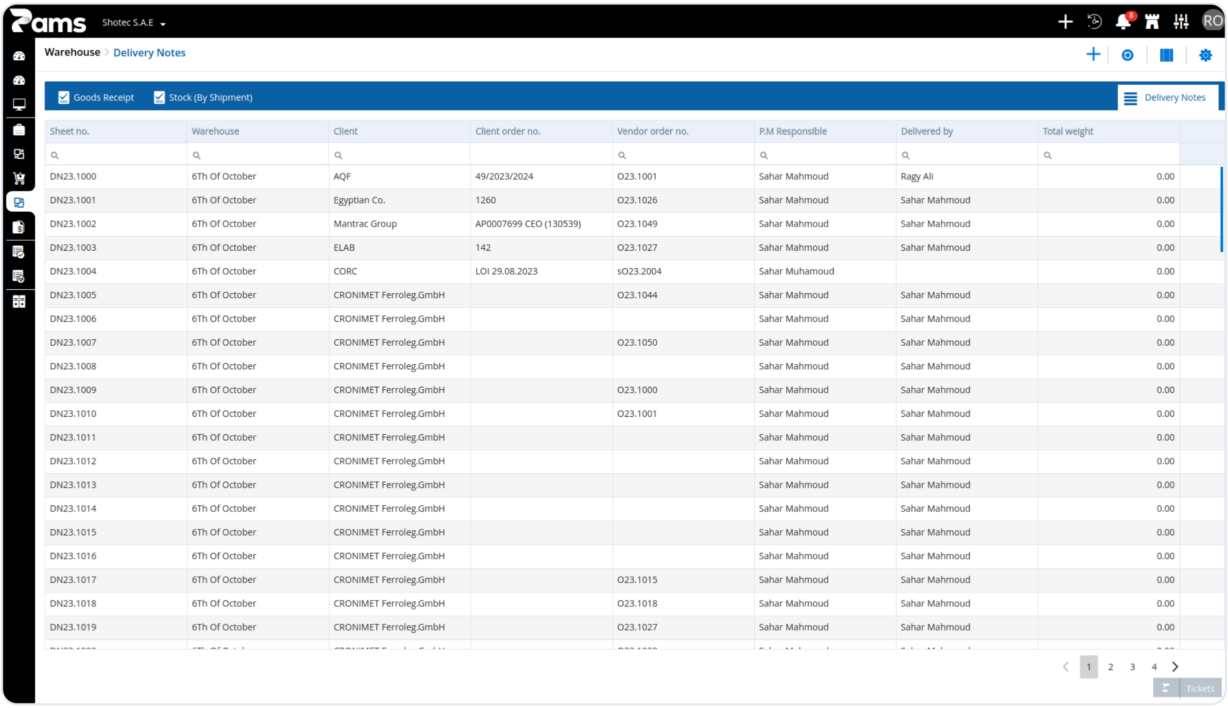
Delivery Note

Applications › Warehouse › List



Delivery Note

Overview

Use the Delivery Note list to locate and review delivery-note records in Warehouse. Warehouse users can search the list, apply filters, and tailor the displayed columns for day-to-day shipment and document review. Sales, project, purchasing, and finance users can use the same list to find delivery notes associated with clients, client order numbers, vendor order numbers, project managers, and responsible users.

Workflow

1. Open **Warehouse**, then select **delivery-note** to work with the delivery-note list.

Review the available records using the list columns, including Sheet no., Warehouse, Client, Client order no., Vendor order no., P.M, and Respo.

2. Decide whether you need to find a specific delivery note or review the current list.
   - To find records, enter a value in the **Search box**. Use identifying information available in the list, such as a sheet number, client name, client order number, or vendor order number.
   - Select **Apply filter** to apply the current filter criteria.
   - To review the unfiltered list, leave the search criteria empty and use the displayed records.

   > **Tip:** Search by the sheet number when you have it available. It is the most direct identifier shown in the Delivery Note list.

3. Decide whether the current columns provide the information needed for your review.
   - Select **Columns Chooser** to adjust the list columns.
   - Use the column selection tools to include the information required for the task, such as Warehouse, Client, Client order no., Vendor order no., P.M, or Respo.
   - Select **Standard Layout** when you want to return to the standard list arrangement.
4. Decide whether to keep the column arrangement for later use.
   - To create a new saved arrangement, select **Add Layout**, enter a value in **Layout name**, and select **Save**.
   - To save changes to the active saved arrangement, select **Update Current**.
   - To remove the active saved arrangement when it is no longer required, select **Delete Current**.
   - Select **Cancel** if you do not want to save the layout changes.

   > **Note:** Use a separate layout when different reviews require different information, for example a client-order review versus a vendor-order review.

5. Decide whether the filtered list must be used outside the application.
   - Select **Export** to export the currently displayed list.

- Before exporting, apply the required search and filter criteria and confirm that the selected columns contain the information you need.

> **Warning:** Export only after confirming the active filter and column layout. The exported result reflects the list currently displayed.

Examples

A warehouse user needs to locate delivery note `DN23.1000` for the 6Th Of October warehouse and review its related client and order references.

1. Open **Warehouse** and select **delivery-note**.
2. In the **Search box**, enter `DN23.1000`.
3. Select **Apply filter**.
4. Review the matching row and confirm the displayed Warehouse, Client, Client order no., Vendor order no., P.M, and Respo values.
5. If the vendor order reference is not displayed, select **Columns Chooser** and adjust the columns to include **Vendor order no.**
6. If this set of columns will be used regularly for delivery-note reviews, select **Add Layout**, enter `Delivery Note Order Review` in **Layout name**, and select **Save**.
7. Select **Export** if the filtered delivery-note list is required for further review outside the application.

Tips

> **Tip:** Use the Client order no. column when reconciling delivery notes with customer-facing sales activity.

> **Tip:** Use the Vendor order no. column when reviewing delivery notes related to externally sourced Buyouts.

> **Note:** The P.M and Respo columns help identify the project manager and responsible user associated with the listed delivery note.

Troubleshooting

The required delivery note is not shown.
Likely cause: The current search or filter criteria do not match the record.
Fix: Review the value entered in the **Search box**, search using another visible identifier such as the client name or order number, and select **Apply filter** again.

A required column is missing from the list.
Likely cause: The active layout does not include that column.
Fix: Select **Columns Chooser** and add the required column, or select **Standard Layout** to restore the standard arrangement.

Changes to the list layout are not available later.
Likely cause: The layout changes were not saved.
Fix: Select **Add Layout**, provide a **Layout name**, and select **Save**; alternatively, select **Update Current** for an existing saved layout.

Related pages

- Awaiting Storage
- External Service
- Warehouse — Learning Path
- Warehouse — Overview
- Delivery Note
- External Service
- Inspection
- Issue Goods
- Awaiting Inspection
- Inspection
- Issue Goods
- Packages
- Received
- Stock
- Stock By Products