

Inspection documents

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Inspection documents

Inspection documents

An inspection document is a named entry in the warehouse inspection reference list. Use this page when you need to review or maintain the names available to inspection work.

The list belongs to **Warehouse settings** alongside other warehouse reference lists.

If you need to...	Go to
Reach the list or open an existing entry	Find an inspection document
Understand the list and the entry form	Understand the list and form
Add, review, or remove an entry	Add or maintain an inspection document
Resolve a message or blocked action	When maintenance does not work
Work with the inspection base	Inspection base
Work with the inspection checklist	Inspection checklist
Work with transfer reasons	Transfer reasons
Work with service types	Service types
Work with stock withdrawal and valuation	Stock withdrawal and valuation

Before you start

Prerequisites

- You are ready to work in the warehouse configuration area.
- Your subscription includes this configuration surface.
- The list and form actions available to you depend on your access.
- The list has loaded before you open an existing entry or create a new one.

The form appears for a selected entry while the new/edit dialog is open.
The list headers can depend on your company's setup, so use the headers actually shown in your list.

Find an inspection document

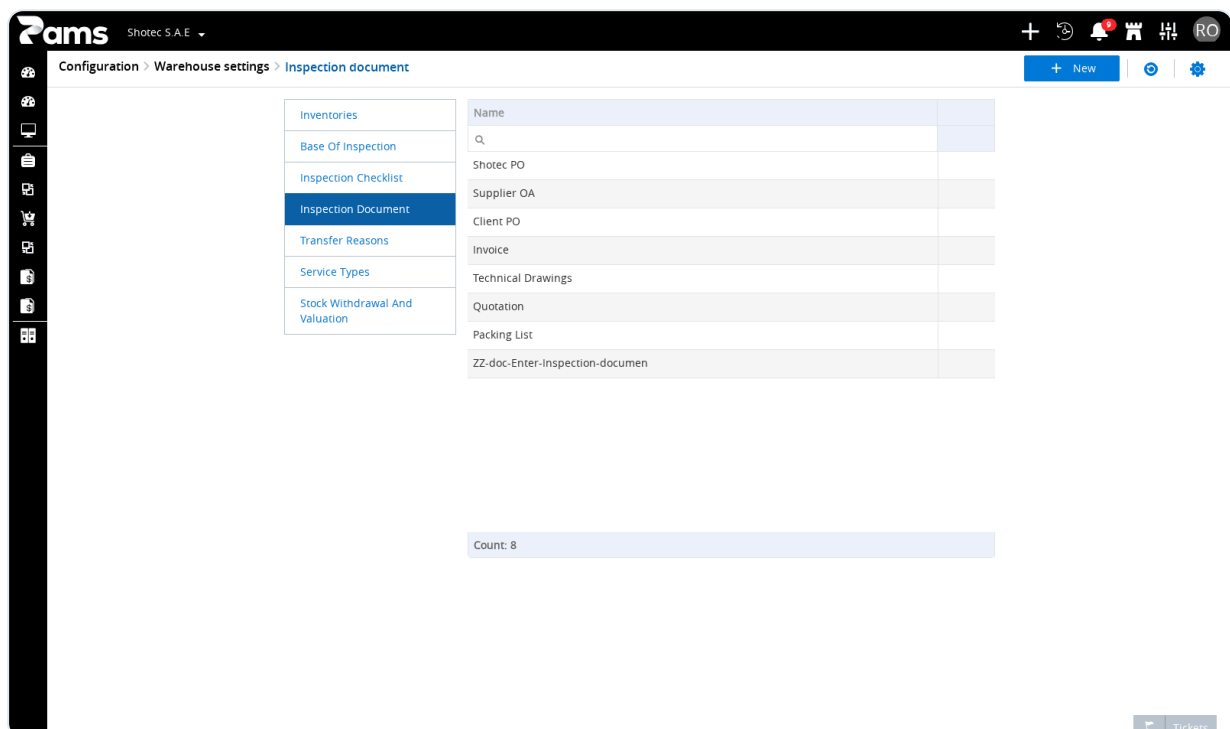
Use the list to locate a name before reviewing or maintaining it.

Prerequisites

- You know that the entry belongs in the inspection document list.

Steps

1. Open **Configuration**.
2. Choose **Warehouse settings**.
3. Select **Inspection document**.
4. Review the **Name** column to identify the row you need.
5. If a filter control is visible for **Name**, use it to narrow the rows.
6. Select the control at the end of the row to open an existing entry.



Result: The inspection document list is on screen, with its **Name** column and available row actions ready for the next task.

Understand the list and form

The list presents the inspection document name; the record also carries system fields that are not

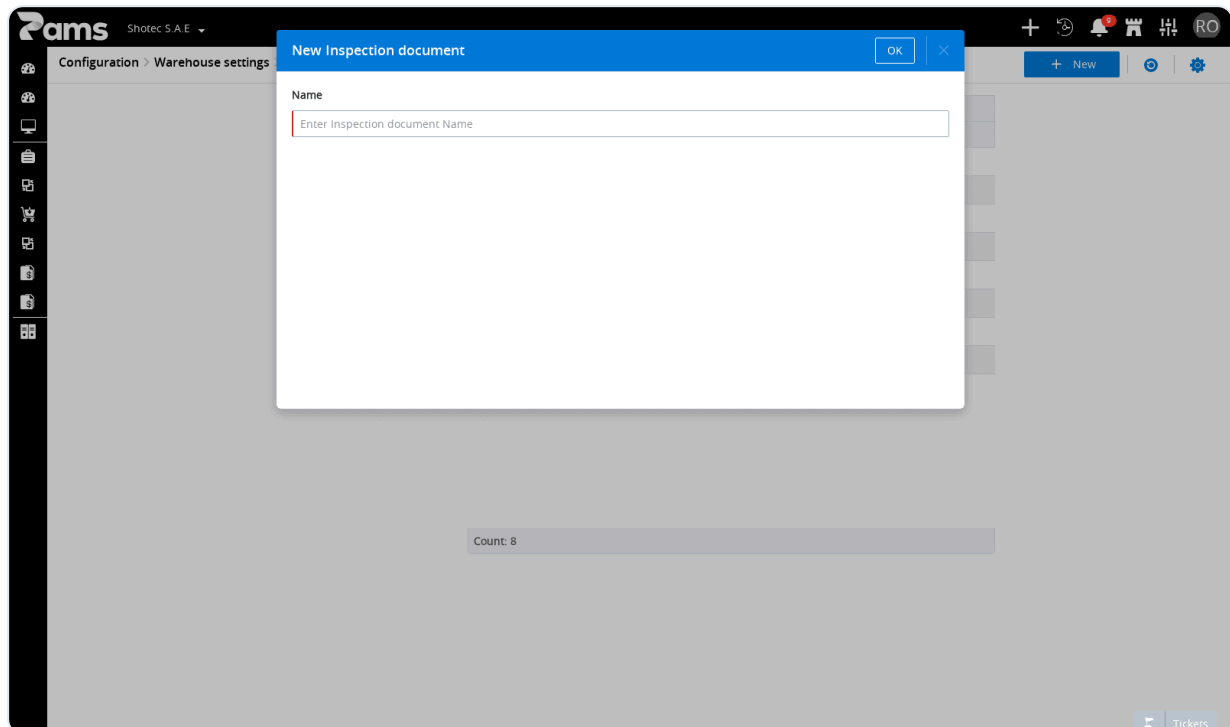
shown for editing. The form presents **Name** as the page-specific field.

Field or surface	What you use it for
Name	The inspection document name shown in the list; it is the first field in the form and is required.
Ordering value	The list's ordering value; it is not shown as a list column or form field.
Company association	The company association; it is not shown as a list column or form field.
Other page-specific field types	This entry form provides no page-specific select box, date box, number box, file field, or multi-value field.

The list showed **Name** as its column. The new-entry surface is titled **New Inspection document**

and shows **Name** with a required marker. The dialog also shows **OK**. Use the controls in each

row's action area; the area has no heading.



Use this field layout when you add, review, or remove an entry.

Add or maintain an inspection document

Use this procedure to add a name, review an existing name, or remove a row. The same page uses the row list for all three tasks.

Prerequisites

- You are on the inspection document list.
- To edit or remove an existing entry, its row is visible in the **Name** column.

Steps

1. Choose the action that matches your task.

If you need to...	Select
Start a new entry	New
Review or change an existing entry	The control at the end of the row
Remove an existing entry	The control at the end of the row

2. For a new or edited entry, enter the name in **Name**.

If **Name** is empty, enter a value in **Name** before completing the dialog; the form displays

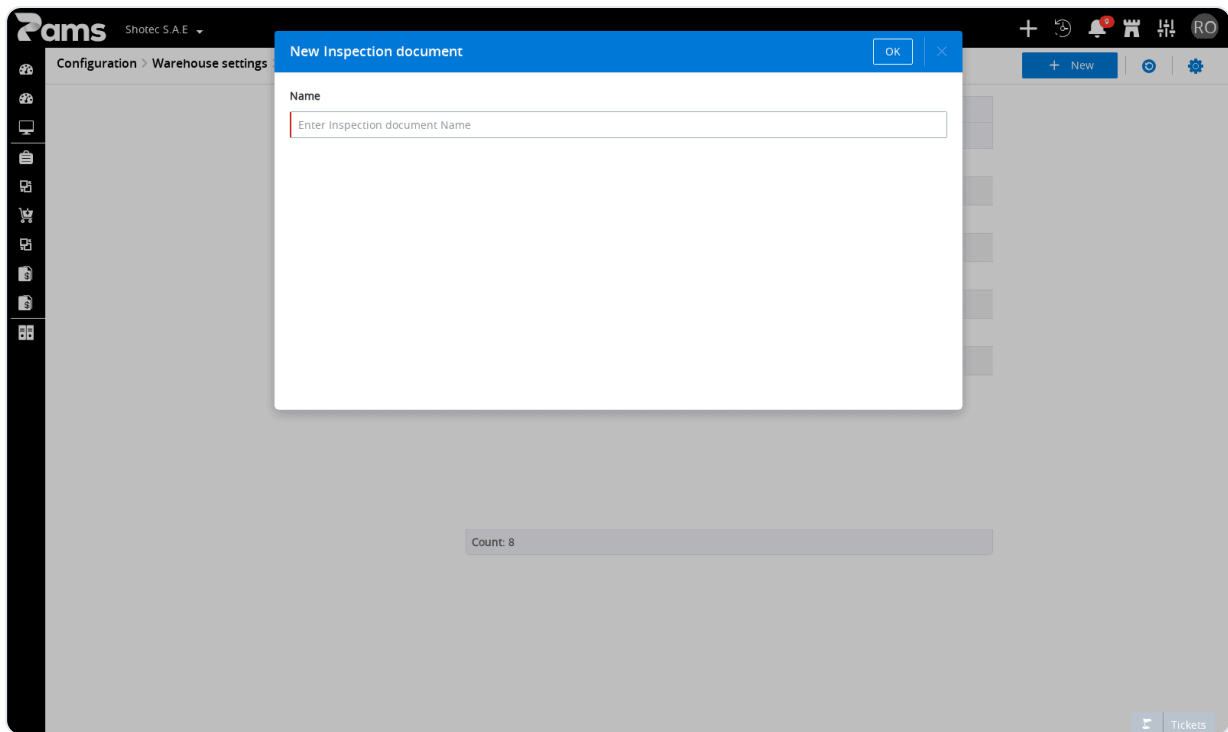
Name is required .

3. For a removal, choose the action that matches your decision.

If you need to...	Select
Close the confirmation menu	Cancel
Continue with removal	Delete

4. For a new or edited entry, select **OK** to complete the dialog.

The form checks its required fields before it sends the entry for saving. New and edited entries produce different success messages.



Result: The selected inspection document entry is open for review or maintenance, or the available delete choice has been selected.

Handle access and surface variations

The page can show different surfaces according to subscription, access, and company setup.

What changes	What you see
The subscription does not include the feature	The configuration area is replaced by the subscription-upgrade surface.
New-entry access is unavailable or the new control is hidden	New is not available.
Edit access is unavailable	The control at the end of the row is not available.
Delete access is unavailable	The control at the end of the row is not available.
Your company setup supplies a different list layout	Work from the column headers shown in your list.
Import or export access is unavailable	The toolbar showed New , Refresh , and Settings , with no import or export controls.

What changes	What you see
Import or export is available	Use the available import or export control from the page toolbar.

This form provides **Name** and no other page-specific field type. The shared surface can contain

controls for other configuration lists, but they do not become fields for this entry.

Use the messages in the next section when an action is blocked.

When maintenance does not work

Use the message text below to choose the next action.

Message	What to do
Name is required	Enter a value in Name before completing the dialog.
Forbidden characters detected. Please remove them and try again.	Remove the forbidden characters from the filter, then apply it again.
Data updated Successfully	The edited entry has been updated.
Data saved Successfully	The new entry has been saved.
Data Deleted Successfully	The entry has been deleted.
Must have at least one item	Keep at least one item in the list before deleting another.
Related to Saved data, Can't be deleted	Keep the entry because saved data is related to it.
Failed to Delete	Keep the entry and retry after resolving the deletion failure.
Data Importing completed	Return to the list and review the imported entries.

The forbidden-character message applies when the list filter is applied. The delete messages apply

to the delete action and the number or relationships of the entries.

After resolving a message, continue with the related warehouse list that matches your next task.

Continue with related warehouse configuration

The warehouse configuration surface groups inspection documents with related reference lists. Use

the page that matches the information you need to maintain next.

If you need to maintain...	Go to
The inspection criteria's foundation	Inspection base
The checks used during inspection	Inspection checklist
The reasons used for transfers	Transfer reasons
The service types used in warehouse work	Service types
Stock withdrawal and valuation settings	Stock withdrawal and valuation
The inspection document names	Stay on this page