

Warehouse — Learning Path

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This learning path is for warehouse operators, inventory coordinators, and supervisors who need to manage the flow of goods through receiving, inspection, storage, transfer, issue, return, and delivery processes. After completing the path, learners will be able to create and monitor warehouse transactions, route goods through the appropriate operational stages, and use warehouse lists to maintain visibility of stock and outstanding work.

Learning objectives

- By the end of this path you can record incoming shipments and identify goods awaiting inspection or storage.
- By the end of this path you can create inspections and move inspected goods into the storage workflow.
- By the end of this path you can create transfer orders, issue goods, and prepare delivery documentation.
- By the end of this path you can process returns and external-service movements.
- By the end of this path you can use warehouse lists to monitor stock, packages, and open operational work.

Prerequisites

- Access to the Warehouse app.
- Permission to view warehouse lists and create warehouse transactions.
- Familiarity with your organization's receiving, inspection, storage, dispatch, and return procedures.
- Access to the relevant shipment, product, package, or order information required by your local warehouse process.

Module 1: Receive and prepare incoming goods

Goal: Establish a controlled inbound workflow by recording arrivals and identifying the next action for received goods.

Lesson 1.1: Record an arriving shipment

When a supplier or carrier delivers goods, you need to create a receiving record so the warehouse has a traceable starting point for the inbound process. Open **Receiving shipment** and create the shipment record according to the delivery information available to you. Then use **Received** to confirm that the received transaction is visible in the warehouse worklist.

Practice task: Create a receiving shipment record for a sample inbound delivery, then locate it in the received list.

Lesson 1.2: Identify goods that require inspection

Not every received item can move directly into storage; goods that require quality or condition review should be tracked as awaiting inspection. Review **Awaiting inspection** to identify received goods that need the inspection workflow. Use this list as the operational queue for inspection work.

Practice task: Open the awaiting-inspection list and identify one item that should be prioritized for review.

Lesson 1.3: Monitor goods ready for storage

After inbound processing, warehouse teams need a clear queue of goods that are ready to be put away. Review **Awaiting storage** to see items that require storage activity and use **Packages** when package-level visibility is needed.

Practice task: Review the awaiting-storage list and compare it with the packages list to identify a package ready for storage.

Module 2: Inspect and store warehouse inventory

Goal: Complete the quality and put-away stages that make incoming goods available for warehouse operations.

Lesson 2.1: Create an inspection for received goods

When goods require verification before storage, create an inspection that records the review in the warehouse process. Start from **Inspection**, create the inspection for the

relevant received goods, and use **Inspection list** to monitor the resulting inspection record.

Practice task: Create an inspection for a sample received item and find it in the inspection list.

Lesson 2.2: Move approved goods into storage

Once goods have completed the required review, they need to enter the storage workflow. Open **Stocking** to record the storage activity for the goods, then review **Awaiting storage** to confirm the storage queue is being managed.

Practice task: Create a stocking transaction for an item that has completed inspection.

Lesson 2.3: Verify available inventory after put-away

Warehouse users need to validate that operational inventory is visible at both an overall and product level. Use **Stock** to review warehouse stock, then use **Stock by products** to focus on inventory by product.

Practice task: Locate a product in the stock-by-products list and compare its visibility with the stock list.

Module 3: Fulfil internal and outbound demand

Goal: Move inventory to the right destination through transfers, issues, and deliveries.

Lesson 3.1: Create a transfer order for an internal movement

When goods must move between warehouse locations or operational destinations, create a transfer order to formalize the movement. Open [Transfer order](#), record the movement according to the request, and monitor it in **Transfer orders**.

Practice task: Create a transfer order for a sample internal stock movement and locate it in the transfer-order list.

Lesson 3.2: Issue goods for a warehouse request

When inventory is being released from the warehouse, create an issue-goods transaction so the withdrawal is recorded. Use [Issue goods](#) to create the issue, then use **Issue goods list** to review issued-goods activity.

Practice task: Record a sample goods issue and verify that it appears in the issue-goods list.

Lesson 3.3: Prepare delivery documentation for outbound goods

For goods leaving the warehouse for delivery, create the corresponding delivery note and monitor its progress. Open [Delivery note](#) to create the document, then review **Delivery notes** to find and follow the outbound record.

Practice task: Create a delivery note for a sample outbound shipment and locate it in the delivery-note list.

Module 4: Manage exceptions and maintain warehouse control

Goal: Handle returns and external-service movements while using lists to review warehouse activity.

Lesson 4.1: Record goods returning to the warehouse

When goods are returned, create a return record so the warehouse can track the reverse movement and follow the appropriate subsequent process. Open **Return note** and create the return transaction, then review **Return notes** to monitor return activity.

Practice task: Create a return note for a sample returned item and find it in the return-note list.

Lesson 4.2: Track goods sent for external service

Some goods leave normal warehouse circulation because they require an external service activity. Use **External service** to record that movement and use **External service list** to review open or recorded external-service transactions.

Practice task: Create an external-service record for a sample item and locate it in the external-service list.

Lesson 4.3: Review end-to-end warehouse workload

Supervisors and coordinators need to identify work waiting at each stage, rather than looking only at completed transactions. Review **Received**, **Awaiting inspection**, **Awaiting storage**, and **Stock** to build a picture of inbound workload and available inventory.

Practice task: Review the four lists and identify one inbound item that still needs its next warehouse action.

Final assessment

1. A carrier arrives with goods that must be recorded before the warehouse can begin its inbound process. Which screen should you use first, and which list would you use to confirm the record is visible?
2. A received item requires a quality review before it can be stored. Which list helps you identify the work, and which screen do you use to create the review?
3. An approved item must be put away, and the inventory team later needs to confirm that stock is visible by product. Which two screens support these actions?
4. A warehouse must release inventory for an outbound shipment and provide delivery documentation. Which transaction should be created for the inventory release, and which transaction should be created for the shipment document?
5. A returned item needs to be recorded, while another item is being sent outside the organization for service. Which two transaction screens should be used?

Answers

1. Use **Receiving shipment**, then check **Received**.
Why: Receiving creates the inbound transaction, and the received list provides visibility of recorded receipts.
2. Use **Awaiting inspection**, then create the review in **Inspection**.
Why: The list identifies items needing review, while the inspection screen records the inspection activity.
3. Use **Stocking**, then review **Stock by products**.
Why: Stocking records put-away activity, and the product-level stock list supports inventory verification.
4. Create **Issue goods** for the release and **Delivery note** for the shipment document.
Why: Issuing records goods leaving warehouse inventory, while the delivery note records the outbound delivery documentation.
5. Use **Return note** for the returned item and **External service** for the service movement.
Why: These transactions separately track returned goods and goods handled through an external-service process.

