



# WMS Warehouse Staff Training & Onboarding Checklist 2026

## Pre-Onboarding & System Access Setup

Verification of hardware provisioning, user credentials creation, and WMS permission level assignments.

### Onboarding Start Date

### Employee Full Name

### Assigned User Role

- ☐ Warehouse Associate
- ☐ Inventory Manager
- ☐ Shipping Supervisor
- ☐ System Administrator

### Required Hardware Access

- ☐ Handheld RF Scanner
- ☐ Mobile Tablet
- ☐ Desktop Workstation
- ☐ Label Printer

### Signed NDA/Confidentiality Agreement

 **Upload File**

### IT Manager Approval Signature

A large, empty rectangular box with rounded corners and a thin gray border, intended for an IT Manager's approval signature.

## WMS Interface & Navigation Fundamentals

Training on dashboard overview, menu navigation, search functions, and real-time status monitoring.

### User Training Module Level

- ☐ Basic User
- ☐ Power User
- ☐ Administrator

### Navigation Competencies Mastered

- ☐ Dashboard Overview
- ☐ Search & Filter Functions
- ☐ Real-time Alert Monitoring
- ☐ User Profile Management
- ☐ Reporting Module Access

### Handheld Device ID

Write something...

### Training Completion Date

Enter date...

### Trainer Verification

## Core Module Operational Training

Step-by-step competency assessment for Receiving, Putaway, Picking, and Shipping workflows.

### Completed Training Modules

- ☐ Inbound Receiving & Unloading
- ☐ Putaway & Bin Allocation
- ☐ Picking (Wave, Batch, or Zone)
- ☐ Packing & Label Generation
- ☐ Outbound Shipping & Manifesting

### Training Proficiency Level

- ☐ Beginner (Needs Supervision)
- ☐ Intermediate (Independent)
- ☐ Advanced (Trainer/Lead Potential)

### Score on Practical Skills Assessment

Enter a number...

### Training Completion Date

Enter date...

### Trainer Verification

### Notes on Specific Knowledge Gaps

Write something...

## Hardware & Peripheral Integration

Instruction on using handheld scanners, mobile computers, label printers, and wearable technology.

### Handheld Devices Provisioned

- ☐ Android Mobile Computer
- ☐ iOS Rugged Tablet
- ☐ Fixed Terminal/Desktop
- ☐ Wearable Scanner

### Barcode Scanner Configuration Status

- ☐ Fully Configured
- ☐ Pending Setup
- ☐ Requires IT Support

### Scanner Serial Number

Write something...

### Hardware Assignment Date

Enter date...

### Technician Verification Signature

### Configuration Profile Documentation

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## Inventory Accuracy & Cycle Counting Procedures

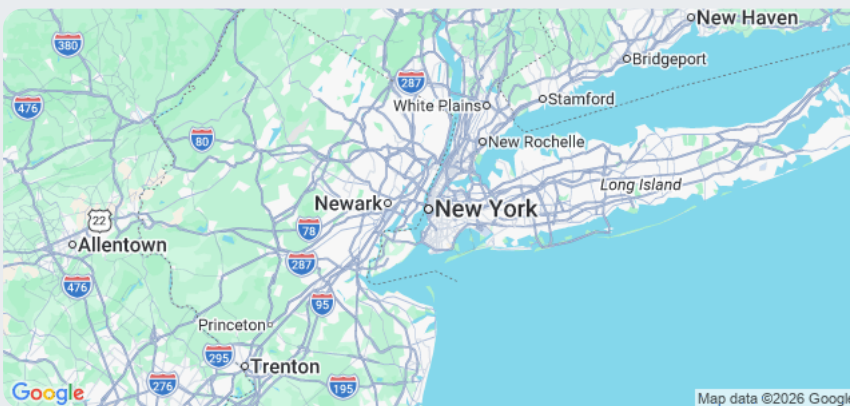
Standard operating procedures for performing manual counts, system reconciliation, and discrepancy reporting.

### Cycle Count Execution Date

Enter date...

### Warehouse Bin/Zone Location Audited

 Set My Current Location



### SKU / Item ID Scanned

Write something...

### System Quantity (WMS Recorded)

Enter a number...

### Physical Quantity (Actual Counted)

Enter a number...

### Discrepancy Status

- ☐ Match
- ☐ Mismatch - Shortage
- ☐ Mismatch - Overage

### Discrepancy Root Cause Analysis

Write something...

### Auditor Verification Signature

## Error Handling & Exception Management

Protocols for managing stuck orders, inventory discrepancies, and system-generated alerts.

### Common Error Types Encountered

- ☐ Inventory Discrepancy
- ☐ Barcode Unreadable/Damaged
- ☐ System Latency/Timeout
- ☐ Incorrect Location Assignment
- ☐ Order Data Mismatch
- ☐ Hardware/Scanner Malfunction

### Error Description

Write something...

### Steps Taken to Resolve Issue

Write something...

### Resolution Status

- ☐ Resolved Immediately
- ☐ Escalated to IT Support
- ☐ Pending Manager Review
- ☐ Requires Inventory Audit

### Date of Error Detection

Enter date...

### Supervisor Verification

## Safety, Compliance & Security Protocols

Training on data security, warehouse safety integration, and proper hardware handling/charging.

### Safety Equipment Check Completed

- ☐ High-Visibility Vest
- ☐ Steel-Toed Boots
- ☐ Safety Gloves
- ☐ Protective Eyewear

### WMS Password Policy Compliance

- ☐ Compliant
- ☐ Non-Compliant

### Incident or Security Risk Report

Write something...

### Safety Training Completion Date

Enter date...

### Safety Officer Acknowledgment

## Post-Training Competency Assessment

Final practical exam and supervisor sign-off to confirm the user is proficient in the live environment.

### Assessment Completion Date

Enter date...

### Training Proficiency Level

- ☐ Novice (Requires Supervision)
- ☐ Intermediate (Can Work Independently)
- ☐ Expert (Can Train Others)

### Verified Competency Areas

- ☐ Inbound/Receiving Workflow
- ☐ Inventory Adjustments
- ☐ Outbound/Shipping Workflow
- ☐ Hardware/Scanner Troubleshooting

### Assessor Feedback & Improvement Notes

Write something...

### Supervisor Validation Signature

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🔧 Generate Sample Report