

INVENTORY PLANNING AND OPERATIONS

Planivaro Inventory Planning & Operations Guide

From Shopify sync to auditable inventory control.

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SYNC

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MAP

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BUY

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RECEIVE

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Welcome to Planivaro

Planivaro is an inventory buying workspace embedded in Shopify Admin. It brings supplier information, reorder planning, purchase orders, receiving, transfers, stocktakes, supplier bills, labels, and audit records into one operational flow.

This guide is written for buyers, inventory managers, receivers, and store owners. You do not need technical or API knowledge. The screenshots use synthetic preview data; your installed app shows your own Shopify products, locations, and inventory.

The operating model

Planivaro separates **planning** from **inventory changes**. You can sync, map suppliers, calculate reorder quantities, create draft POs, receive deliveries, run counts, and review transfers in preview mode. A Shopify inventory update can happen only when the relevant deployment availability, Shopify permission, store choice, and exact-operation confirmation all pass.

Stage	What Planivaro does	What you decide
Sync	Imports Shopify variants, locations, and inventory	When to refresh the workspace
Map	Connects variants to suppliers and buying rules	Which supplier and constraints are correct
Buy	Calculates or records purchase quantities	Which lines and quantities enter a draft PO
Receive	Classifies delivered units and saves a receipt preview	Whether to commit that exact receipt
Count	Saves blind or visible counts and compares with Shopify	Whether to commit the frozen adjustment preview
Audit	Records actions, exports, and outcomes	How to investigate and reconcile exceptions

IMPORTANT

Planivaro does not automatically send a PO to a supplier, move money, post to an accounting system, or make an inventory change from a forecast alone.

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INVENTORY PLANNING

Setup and buying workflow

Continue setup

Open user guide

Synced variants

1

Shopify inventory snapshots

Supplier mappings

0

Supplier-backed variants

Reorder lines

2

Current buy suggestions

Draft POs

1

Buying documents

Workflow progress

3/5 done

Sync through export

First run

3/5 done

Merchant path from installed Shopify data to exported buying evidence.

Preview workflow loaded.

Sync Shopify

Sample Shopify inventory is loaded for preview.

Done

Supplier CSV

Import the supplier CSV to replace the seeded preview data.

Current

Reorder preview

2 preview reorder suggestion(s) ready.

Done

Draft PO

1 draft purchase order(s) available in preview.

Done

Labels and audit

Export a PO, receive in dry-run, then export labels or audit evidence.

Pending

NEXT ACTION

Import supplier CSV

Add supplier SKUs, costs, MOQ, pack size, lead time, and restock period.

Continue

Starter CSV templates

Download the import shapes for supplier data, legacy mapping, and reorder rules.

Overview keeps setup status and the next operational step together.

Planivaro · English · v1.0

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1. Install, trial, and access

Planivaro opens inside Shopify Admin after the store has been granted installation access. The plan includes a 45-day trial, then costs \$29 USD monthly or \$290 USD yearly. Shopify App Pricing is the source of truth for the subscription shown to the store.

Before you begin

- Sign in as a Shopify user allowed to install apps and approve charges.
- Confirm that the store you are viewing is the store you want Planivaro to use.
- Allow the read access requested during installation. Inventory write access is optional and can be requested later from Settings.

Install Planivaro when access is available

1. Open [Planivaro on the Shopify App Store](#) or the installation link supplied by Planivaro support.
2. Select **Install** and choose the correct Shopify store.
3. Review the requested access and approve the installation.
4. Select the monthly or annual plan when Shopify presents App Pricing.
5. Open Planivaro from **Shopify Admin > Apps > Planivaro**.

Expected result: the Overview page names your `.myshopify.com` domain and starts the first-run checklist.

NOTE

New-store self-service access can be paused while distribution or review changes are processed. If Shopify says the app is unavailable, do not try to bypass installation. Contact Planivaro support and continue only after access is confirmed for your store.

WARNING

A `plan_handle` or return URL is not proof of payment. If Planivaro cannot verify an active trial or subscription with Shopify, new access fails closed. Retry from the Plan page or contact support.

Access after installation

Open Planivaro from the Shopify Admin Apps menu. Keep the app inside Shopify Admin so the authenticated shop context is preserved. If a bookmark opens a standalone error page, return to Shopify Admin and reopen Planivaro there.

Cancel or uninstall

Subscription cancellation and uninstall change access; they do not deliberately delete operational records such as suppliers, POs, receipts, bills, counts, labels, or audit events. Contact support before reinstalling if you need help recovering access to an existing workspace.

2. Navigate and complete first setup

The left navigation follows the inventory workflow:

- **Overview** shows readiness and the next action.
- **Sync** imports Shopify operational data.
- **Suppliers** maps variants and buying constraints.
- **Reorder** prepares rule-based reorder quantities.
- **Demand lab** shows decision-support recommendations when available.
- **Purchase orders** holds internal draft POs and receiving history.
- **Transfers** tracks movement between Shopify locations.
- **Supplier bills** tracks invoices, due dates, and external payments.
- **Stocktakes** runs full counts and filtered cycle counts.
- **Labels** creates printable receiving labels.
- **Audit** searches and exports activity history.
- **Plan** shows the Shopify App Pricing state.
- **Settings** controls optional inventory writeback.

Recommended first-run order

1. Complete a Shopify sync.
2. Import or create supplier mappings.
3. Generate and review reorder suggestions.
4. Create one draft purchase order.
5. Export the PO before recording a receipt.
6. Run the first receipt in dry-run mode.
7. Review Labels and Audit.

NOTE

You can learn the workflow safely in preview mode. Enabling writeback is a separate decision and is not required to create useful buying records.

3. Sync Shopify data

Sync creates the Shopify data foundation used throughout Planivaro: product variants, locations, and inventory snapshots. The initial import is asynchronous, so a large catalog can continue processing after you leave the page.

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SHOPIFY ADMIN API

2026-07

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Sync control

Shop domain

retailer.myshopify.com

Sync Shopify data

Check sync progress

No installed Shopify shop session was found. Start at /auth?shop=your-store.myshopify.com.

session

read_products

read_inventory

read_locations

write_inventory via pilot flag

NEXT

Supplier CSV

Bring supplier SKU, cost, MOQ, pack size, lead time, and restock-period rows into the buying workflow.

Open supplier import

Sync control reports import state, records processed, and the last successful refresh.

Start a sync

1. Open **Sync**.
2. Select **Start sync**.
3. Keep working or leave the page while Shopify prepares the bulk result.
4. Return to Sync and confirm that the job reaches a completed state.
5. Compare the displayed variant and location totals with Shopify.

Expected result: Planivaro reports a successful job and Overview marks Shopify sync complete.

Understand sync states

State	Meaning	Action
Queued or running	Shopify is preparing or returning bulk data	Wait; do not start duplicate jobs
Completed	Results were ingested and snapshots persisted	Continue to Suppliers
Failed	Shopify or Planivaro returned a terminal error	Read the error, then retry once
Stale	The last successful snapshot is older than the operation allows	Sync again before confirming a write

STOP

Do not approve an inventory-changing receipt, transfer, or stocktake from stale information. Refresh first, then rebuild the exact preview.

Near-real-time changes

Webhooks update supported Shopify changes after the initial import. Webhook processing is idempotent: a repeated delivery should not duplicate the business event. A manual sync remains the clearest recovery step when totals no longer agree.

4. Import suppliers and buying rules

Supplier mappings tell Planivaro where a variant is purchased, what it costs, and how the supplier accepts orders. Download the template from **Suppliers** instead of creating headers from memory.

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SUPPLIER MASTER

CSV import

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supplier-template.csv

Choose CSV

supplier_name,supplier_email,shopify_sku,supplier_sku,cost,currency,moq,pack_size,lead_time_days,restock_period_days,primary_supplier

Apex Goods,buying@apex.example,APX-TEE-BLK-M,APX-1001,12.5,USD,12,6,10,30,true

Northline Supply,ops@northline.example,NL-BAG-TAN,NL-778,22,USD,4,2,14,45,false

Import rows

Template loaded.

NEXT

Reorder preview

Review supplier-backed buy quantities after Shopify sync and supplier rows are in place.

Open reorder preview

Supplier CSV import connects Shopify variants to costs, order multiples, and lead times.

Supported supplier CSV fields

Header	Purpose	Example
supplier_name	Supplier display name	Northstar Supply
supplier_email	Optional operational contact	orders@example.com
shopify_sku	Matches a Shopify variant	NS-1024
supplier_sku	Supplier's own item code	BIN-LG-04
cost	Unit cost in the selected currency	4.25
currency	Three-letter currency code	USD
moq	Minimum order quantity	12
pack_size	Required order multiple	6
lead_time_days	Expected supplier lead time	14
restock_period_days	Desired interval between buying runs	7
primary_supplier	Whether this is the default mapping	true

Import the file

1. Open **Suppliers** and download **Template**.
2. Add one row per supplier-variant relationship.
3. Preserve Shopify SKU spelling. SKU may be blank or duplicated in Shopify, so inspect every ambiguous or unmatched row.
4. Upload the CSV.
5. Review imported, skipped, duplicate, and error counts.
6. Correct rejected rows and upload only the corrected data.

Expected result: supplier mappings appear in the workspace and Reorder can apply cost, MOQ, pack size, and lead time.

WARNING

A successful file upload does not make an ambiguous SKU safe. Resolve unknown or duplicate variants before using the mapping in a PO.

Stocky-era files

Planivaro recognizes common alternate names for supplier SKU, cost, MOQ, pack size, and lead time. Use the Stocky-oriented template when migrating an existing export, then verify the normalized result rather than assuming every source column has the same meaning.

5. Create reorder suggestions

Reorder combines inventory position, buying rules, and demand evidence to propose purchase quantities. The page also accepts manual quantities, which is useful for new products, special orders, or situations where historical evidence is not representative.

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BUYING TABLE

Reorder preview

Create purchase order draft

Open guide

Troubleshooting

SELECT	ITEM	SUPPLIER	AVAILABLE	INCOMING	VELOCITY	POINT	SUGGESTED	ORDER QTY	URGENCY
☒	Everyday Tee - Black / M APX-TEE-BLK-M	Apex Goods gid://shopify/Location/1	1	0	2.1/day	24	90	90	urgent
☐	Market Tote - Tan NL-BAG-TAN	Northline Supply gid://shopify/Location/1	0	0	0.9/day	17.6	60	60	urgent
☐	Canvas Cap - Olive APX-HAT-OLV	Apex Goods gid://shopify/Location/1	16	12	0.7/day	11	0	0	watch

REORDER RULES

Min/max CSV

reorder-rules-template.csv

shopify_sku,location_id,supplier_name,safety_stock,min_stock,max_stock,forecast_window_days,excluded_from_buy
APX-TEE-BLK-M,gid://shopify/Location/1,Apex Goods,0,24,91,30,false
NL-BAG-TAN,gid://shopify/Location/1,Northline Supply,0,17.6,60,30,false
APX-HAT-OLV,gid://shopify/Location/1,Apex Goods,0,11,28,30,false

Import rules

Template loaded.

NEXT

Purchase order drafts

Export the PO, then open receiving when the goods arrive or when a reviewer needs the dry-run path.

Open purchase order drafts

Reorder preview explains demand, stock position, constraints, and the quantity selected for a draft PO.

Generate a preview

1. Open **Reorder**.
2. Select a destination location and, where available, a supplier.
3. Generate suggestions.
4. Review each line's available inventory, inbound quantity, demand or rule context, and reason codes.
5. Enter a manual quantity where the suggestion is zero or needs an operational override.
6. Confirm that the final quantity respects MOQ and pack size.
7. Select only the lines you intend to place on the same supplier and destination PO.

How rule-based quantities work

Planivaro retains transparent min/max and moving-window baselines. A simplified target is demand during lead time and the desired restock period, plus safety stock, less usable inventory and reliable inbound. The result is rounded to the supplier's MOQ and pack size.

Result	Interpretation
Positive suggestion	Inventory position is below the computed target
Zero suggestion	No rule-based purchase is currently needed, or evidence/mapping is missing
MOQ applied	The raw need was raised to the supplier minimum
Pack rounded	The quantity was raised to a valid order multiple
Manual quantity	A merchant selected an explicit quantity instead of the automatic value

IMPORTANT A suggestion is not an order. It becomes an internal draft PO only after you review the exact lines, supplier, location, and quantities.

6. Understand Demand Lab availability

Demand Lab is Planivaro's forecasting and buying-decision workspace. It is intentionally separate from the stable rule-based Reorder workflow. **It is currently disabled and inert in the public product:** the released Shopify scopes do not include order-history access for forecasting. The page can therefore show its shadow-mode boundary or missing prerequisites, but public merchants should use Reorder for current buying decisions.

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DEMAND INTELLIGENCE

Buying decisions

Shadow mode

Review draft (0)

Run analysis

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Decision support only

Planivaro compares demand models, supplier reliability, current inventory, inbound stock, MOQ, and pack constraints. Results are saved for review and never create purchase orders or inventory writes automatically.

Needs attention

0

Buy, transfer, expedite, defer, or count

Suggested buy

0 units

After MOQ and pack rounding

High stockout risk

0

At least 50% before action

Latest run

Not run

Run shadow analysis after readiness passes

Low-stock queue

Expected demand is the model mean; target demand uses the selected service-level quantile.

0 pairs

No shadow decisions yet. Run an analysis after the readiness gates pass.

Demand Lab is currently inert for public merchants; the screen makes its decision-support-only boundary explicit.

Understand the shadow workflow

When a controlled shadow run is available, recommendations can use one of these actions:

Action	Meaning
Buy	Purchase from the mapped supplier
No buy	Current inventory position is sufficient
Defer	Wait because evidence, budget, or timing does not support buying now
Expedite	Follow up on inbound supply rather than place a duplicate order
Transfer	Use measured surplus at another location
Stocktake	Verify inventory because uncertainty is more important than forecast demand

Review the forecast origin, evidence window, predicted demand range, inventory position, supplier reliability, cost, constraints, and explanation. P50 is a middle estimate; P80 and P95 are progressively more conservative demand ranges, not guarantees.

Recommendation-derived draft POs

This controlled workflow is not a normal public merchant action today. In an authorized rollout, an operator would:

- 1. Open the exact recommendation run.
- 2. Select only **Buy** lines with a positive quantity.
- 3. Confirm one supplier and one destination location for the PO.
- 4. Review the run timestamp and reject stale evidence.
- 5. Confirm the exact run and quantities.

Expected result: Planivaro creates one internal draft PO. Retrying the same confirmed operation does not create a duplicate.

STOP

Forecasts never create POs or change inventory automatically. A missing calibration, reconciliation, shadow-duration, or inventory-cost gate is a failed gate, not permission to proceed.

7. Work with purchase orders

Planivaro purchase orders are internal operational records. They group one supplier, one destination location, and explicit line quantities. Export the PO and send it through your normal supplier communication channel.

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SUPPLIER EXECUTION

Draft purchase orders

[Open guide](#) [Troubleshooting](#)

po_validation_001

Apex Goods - 1 line - USD 1050.00

Open

↓ CSV

HTML

↓ PDF

Create bill

Receive

Showing preview draft POs.

NEXT

Purchase order receiving

Prepare an exact dry-run, then commit once only when the store has enabled every safety gate.

Open receiving

Draft purchase orders remain internal until you export and send them through your normal supplier channel.

Create a draft PO

1. From Reorder or Demand Lab, select compatible lines.
2. Review supplier, destination location, SKU, supplier SKU, quantity, unit cost, and total.
3. Select **Create draft PO**.
4. Open **Purchase orders** and confirm the new draft appears once.

Export and use the PO

- Export CSV for spreadsheet or system handoff.
- Use the printable HTML view for printing or PDF output.
- Send the exported PO to the supplier outside Planivaro.
- Return to the same PO when goods arrive.

PO lifecycle

A draft can be reviewed and exported before receiving begins. Complete, partial, and multiple receipts accumulate against the ordered lines. Once receiving activity exists, the PO destination location is locked so historical receipts do not become ambiguous.

WARNING

Cancellation is available only before protected operational activity. Planivaro preserves committed receipts and corrections as history instead of editing them away.

8. Receive a purchase order

Receiving records what physically arrived. Accepted, damaged, rejected, and missing quantities remain separate. Only accepted units are eligible to increase available inventory; the other classifications remain ledger evidence.

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PURCHASE ORDER RECEIVING
PO-1001

[Open](#)[Preview only](#)[Open guide](#)[Troubleshooting](#)

Supplier
Apex Goods

Shopify location
gid://shopify/Location/1

Open units
84

Writeback mode
Preview only

[Cancel purchase order](#)

This delivery
Accepted units increase available stock. Damaged and rejected units close PO quantity without changing Shopify. Missing units remain open.

Scan SKU or barcode
Scan or enter an exact SKU or barcode.

[+ Add accepted unit](#)

ITEM	ORDERED	PROCESSED	OPEN	ACCEPTED	DAMAGED	REJECTED	MISSING	REASON
APX-TEE-BLK-M Everyday Tee - Black / M - 812345000012	84	0	84	0	0	0	0	Optional note

Step 1: prepare preview
This records an audit-safe dry-run and does not change Shopify.

[Prepare dry-run preview](#)

IMMUTABLE LEDGER
Receipt history
Corrections are linked compensating movements; source receipts are never edited or deleted.

0 records

No receipt previews recorded yet.

Enter this delivery, then prepare a dry-run preview. Shopify inventory will not change during preview.

NEXT

Receiving separates accepted, damaged, rejected, and missing quantities before any optional inventory update.

Before you begin

- Open the correct PO and select its Shopify destination location before receiving activity.
- Confirm that Shopify data is current.
- Decide whether the store is staying in dry-run or using live receiving writeback.
- Use exact SKU or barcode scanning; a scan must identify one expected line.

Prepare and save a receipt

1. Open **Purchase orders**, then the PO's receiving action.
2. For every line, enter accepted, damaged, rejected, and missing quantities.
3. Check that totals reflect the physical delivery and do not exceed the allowable PO balance.
4. Save the receipt preview.
5. Review the immutable preview, destination, classifications, and inventory effect.
6. In dry-run, commit the internal receipt without a Shopify inventory mutation.

7. In live mode, type or select the exact final confirmation for that receipt.

Expected result: the receipt is saved once, PO progress updates, receipt history remains available, and accepted quantities change Shopify only when every writeback gate passes.

Retry, timeout, and uncertainty

Planivaro persists the receipt intent and an idempotency key before contacting Shopify. A retry uses that same receipt, payload, and key. If the result is uncertain, the PO remains locked until the exact operation is reconciled; do not create a replacement receipt.

Correct a committed receipt

Committed receipts are immutable. Create a linked correction that subtracts no more than the remaining correctable accepted quantity. The correction uses a new operation key and is visible in audit history. Correction receipts do not create new-unit labels.

STOP

Never retry an uncertain receipt by inventing a new key or editing the original record.
Reconcile the exact saved operation first.

9. Plan and track inventory transfers

Transfers track a planned movement from one active synced Shopify location to another. Dispatch and destination receipt are separate operations so in-transit, accepted, damaged, rejected, and missing quantities remain visible.

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MULTI-LOCATION INVENTORY

Transfers

+ New transfer

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Status

Origin

Destination

All statuses

All origins

All destinations

TRANSFER	ROUTE	REQUESTED	SHIPPED	ACCEPTED	IN TRANSIT	STATUS
Outlet replenishment 3 line(s)	Main warehouse → Outlet	48	48	24	24	IN TRANSIT

Transfers are scoped to this installed Shopify store.

Transfers track dispatch, in-transit quantities, and destination acceptance as separate operations.

Create and dispatch a transfer

1. Open **Transfers** and create a transfer.
2. Select different origin and destination locations.
3. Add variants and requested quantities.
4. Review the saved dispatch preview.
5. In preview-only mode, record the operation without changing Shopify.
6. Transfer writeback is currently unavailable in production. Record and review the dispatch in preview-only mode; no Shopify source decrement is performed.

Receive the transfer

1. Open the in-transit transfer.
2. Classify destination quantities as accepted, damaged, rejected, or missing.
3. Review the exact receipt preview.

4. Confirm the internal preview. Transfer receipt writeback is currently unavailable, so Shopify destination inventory is not incremented by this workflow.

Statutes and recovery

Typical states are Draft, Ready, In transit, Partially received, Completed, Cancelled, and Uncertain. A transport timeout makes the transfer uncertain and blocks a new preview until the saved operation is retried or manually reconciled. Corrections are linked compensating operations and cannot exceed the remaining correctable amount.

IMPORTANT

Transfer writeback has its own deployment availability, permission check, store choice, and exact-operation confirmation. Its production availability is currently off. Receiving or stocktake approval does not enable transfers.

10. Run stocktakes

Stocktakes support full inventory counts and filtered cycle counts. Counts persist as you work, can be blind, can require a second count, and freeze an exact compare-and-swap preview before an optional Shopify update.

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PHYSICAL INVENTORY

Stocktakes

+ New count

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COUNT	LOCATION	PROGRESS	DISCREPANCIES	STATUS	UPDATED
August cycle count Cycle count - Blind	Main warehouse	116/120	7	REVIEW	8/1/2026, 11:10:00 AM

Counts are persisted and can be resumed from their last saved line.

Stocktakes support full or filtered counts, saved progress, second counts, and immutable previews.

Create a count

1. Open **Stocktakes** and select **New stocktake**.
2. Select one Shopify location.
3. Choose a full count or filter by product, SKU, barcode, vendor, or collection.
4. Choose blind count when counters should not see the expected quantity.
5. Save the stocktake.

Count and review

1. Search or scan the exact variant.
2. Enter the physical quantity. Enter zero explicitly; an uncounted line is never converted to zero.
3. Save progress and resume as needed.
4. Request and complete a second count when the discrepancy needs verification.
5. Refresh Shopify baselines and resolve concurrent-change conflicts.
6. Freeze the immutable preview.

7. Review every `change from` and target quantity.
8. Keep preview-only, or use the exact final confirmation when stocktake writeback is enabled.

Concurrency safety

Each live adjustment includes the concrete Shopify quantity that the preview compared against. If Shopify changed after the preview, the operation fails closed and requires reconciliation and a physical recount. A retry uses the same frozen batch and idempotency key.

WARNING

Do not treat an uncounted product as zero and do not bypass a requested second count or Shopify conflict.

11. Track supplier bills and external payments

Supplier bills connect a received Planivaro PO to the supplier invoice, due date, invoiced quantities, and records of payments made elsewhere. Planivaro does not transfer funds, use Shopify Bill Pay, or post to accounting software.

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ACCOUNTS PAYABLE CONTROL

Supplier bills

Refresh

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Open bills

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Approved with a remaining balance

Due in 7 days

1

Upcoming supplier commitments

Overdue

0

Past due with no payment recorded

Supplier balances

1

Supplier and currency groups

Create from purchase order

Planivaro copies ordered and received quantities into a draft for three-way matching.

Purchase order

Invoice number

Invoice date

Due date

po_validation_001 · Apex Goods · Open

INV-2026-1048

03/08/2026

02/09/2026

+ Create draft bill

Status

Supplier

Invoice from

Invoice to

All statuses

All suppliers

dd/mm/yyyy

dd/mm/yyyy

Outstanding by supplier

Open approved balances, separated by currency.

Apex Goods

\$951.40

INVOICE	SUPPLIER	DUE	STATUS	TOTAL	PAID	BALANCE
INV-2048 PO-1001	Apex Goods	2026-08-19	Partially paid	\$1,551.40	\$600.00	\$951.40

1 supplier bill(s).

Supplier bills match PO, receipt, invoice, due date, and external payment records without moving money.

Create and approve a bill

1. Open a received PO and create a supplier bill draft.
2. Enter the supplier invoice number and due date.
3. Match ordered, received, and invoiced quantities and costs.
4. Resolve discrepancies before approval.
5. Approve the bill. Approved invoice fields are locked.

Record an external payment

1. Open the approved bill.
2. Record the amount, date, reference, and payment method used outside Planivaro.
3. Confirm the updated paid and balance totals.

Planivaro derives Draft, Unpaid, Partially paid, Paid, Overdue, and Void from approval, due date, active payment records, and void state. It prevents duplicate invoice numbers per shop and supplier, zero or negative payments,

duplicate payment requests, and overpayments.

Reverse or void

Payments are immutable records. Correct a payment with a linked reversal. A bill with an active paid balance cannot be voided until active payments are reversed. Voiding preserves the original bill and history.

12. Print labels and export records

Labels represent newly accepted physical units from normal receipts. Use them for receiving packets or product handling; correction receipts do not create labels.

Generate labels

1. Open **Labels** after recording a normal receipt.
2. Select the eligible receipt lines and quantities.
3. Generate the label batch.
4. Review SKU, barcode, product identity, and quantity.
5. Print or save using the browser print dialog.

Available exports

Area	Typical export
Suppliers	Import result and template CSV
Reorder	Rule or suggestion CSV
Purchase orders	CSV and printable HTML
Receipts	Receipt CSV and printable HTML
Transfers	Transfer and operation records
Stocktakes	Count lines, preview, and outcome CSV
Supplier bills	Bill, matching, balance, and payment records
Audit	Filtered event ledger CSV

NOTE

Browser printing can save printable HTML as PDF. This is separate from the Planivaro user guide you are reading.

13. Review audit history

Audit records show who or what initiated a supported action, when it occurred, the affected resource, and the recorded outcome. Use Audit before repeating a request that timed out or appears uncertain.

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Event family

Entity type

From

To

All events

Receipt

dd/mm/yyyy

dd/mm/yyyy

Apply

Clear

TIME	EVENT	ENTITY	ACTOR	SOURCE	REASON
8/3/2026, 3:31:50 PM	purchase_order.ordered	PurchaseOrder po_validation_001	merchant	ui	Validation workflow status transition.
7/6/2026, 10:05:00 AM	sync.completed	SyncJob sync_validation_seed	worker	worker	Seed demo synced Shopify data for first-run validation.

Showing sample audit events.

NEXT

First-run progress

Return to the onboarding checklist to confirm the workflow has evidence from sync through export.

Review progress

Audit records make operational decisions and inventory-changing attempts traceable.

Investigate an operation

1. Open **Audit**.
2. Filter by event type, resource, date, or operation identifier.
3. Follow linked receipt, transfer, count, bill, or correction records.
4. Compare prepared, committed, failed, retried, uncertain, and reconciled events.
5. Export the filtered ledger for internal sign-off or support.

What idempotency means

An idempotency key identifies one exact operation. Repeating that operation with the same payload and key should not apply it twice. Changing the payload while reusing a key is rejected. Creating a fresh key for an uncertain old operation is unsafe because Shopify may already have applied the first request.

IMPORTANT

When the UI says an outcome is uncertain, investigate the saved operation and Shopify inventory before taking another inventory-changing action.

14. Inventory change controls

Settings keeps three independent controls: receiving writeback, stocktake writeback, and transfer writeback. Every store starts conservatively. Preview-only or dry-run records the Planivaro workflow without changing Shopify inventory. Receiving and stocktake writeback are available only after their prerequisites pass; transfer writeback is currently paused at the deployment gate.

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Receiving mode

Review a saved preview before any Shopify inventory change. Every receipt needs final approval.

Dry-run

Next: review the one-time acknowledgement

The checkbox below only unlocks this store control; it does not change inventory.

I understand that a committed receipt increases available inventory in the selected Shopify location.

Planivaro availability

Opened independently for live receiving.

Available

Shopify inventory access

Optional permission; the merchant can revoke it.

Granted

Store choice

Controls live receiving for this shop only.

Dry-run

Final receipt approval

Required after reviewing each exact preview.

Every receipt

Stocktake mode

Review a frozen count before any Shopify inventory change. Every stocktake needs exact final approval.

Preview-only

Next: review the one-time acknowledgement

The checkbox below only unlocks this store control; it does not change inventory.

I understand that an approved stocktake sets the reviewed counted quantities only when Shopify still matches the frozen baseline.

Planivaro availability

Opened independently for live stocktakes.

Available

Shopify inventory access

The synthetic preview shows how Settings names the first unmet prerequisite; live availability is verified separately for each workflow.

The four prerequisites

Prerequisite	Purpose
Planivaro availability	Operations has opened that specific capability on the deployment
Shopify inventory access	The store granted the optional <code>write_inventory</code> permission
Store choice	The merchant deliberately enabled that capability for this store
Exact confirmation	The merchant approves the immutable receipt, count, or transfer operation

The one-time store acknowledgement unlocks the relevant store control; it does not change inventory. Planivaro shows it only after deployment availability and Shopify permission are ready. Every actual operation still requires its own exact final confirmation.

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Enable a store control

1. Open **Settings**.
2. Find Receiving, Stocktake, or Transfer mode.
3. Read the first unmet prerequisite shown by the page. A paused deployment gate cannot be overridden by the store.
4. Grant optional Shopify inventory access if required.
5. Read and accept the one-time store acknowledgement.
6. Turn on the store control for that capability.
7. Return to the operation and review its exact preview before confirming.

Disable writeback

Return to Settings and turn off the relevant store control. New operations remain preview-only. Disabling a control does not erase committed history or reverse previous Shopify changes.

STOP

Never interpret the one-time acknowledgement as approval for future receipts, counts, or transfers. It only unlocks the switch. Exact confirmation is required again for every saved operation.

15. Troubleshooting

The app opens outside Shopify or shows an authentication error

Return to **Shopify Admin > Apps > Planivaro**. Confirm you selected the correct store and that your Shopify user still has access. Avoid stripping `shop` or `host` context from embedded links.

Sync remains running

Large bulk imports are asynchronous. Wait for Shopify to complete the operation, then refresh Sync. If it remains unchanged well beyond a normal catalog import, record the job identifier and contact support instead of launching many duplicate jobs.

A CSV row is rejected

Download the current template. Check the header, numeric formats, currency, SKU match, duplicated rows, MOQ, pack size, lead time, and primary supplier value. Re-upload only corrected rows and inspect ambiguous SKU results.

A reorder suggestion is zero

Check supplier mapping, location, available inventory, inbound quantity, rule values, and demand evidence. Zero can be a valid recommendation. Use a manual quantity only when you have an operational reason and review MOQ and pack rounding.

A switch is disabled

Settings names the first unmet prerequisite. Deployment availability, optional Shopify permission, one-time acknowledgement, and store choice are separate. Even after the switch is enabled, each exact operation needs confirmation.

A write timed out or is uncertain

Stop. Open Audit and the original resource. Retry only the saved payload and idempotency key when the UI offers that recovery path. Otherwise compare Shopify and Planivaro, document the result, and reconcile manually with support.

Inventory changed while counting

Do not force the old preview. Refresh the Shopify baseline, resolve the conflict, physically recount the affected line, and freeze a new exact preview.

A bill total or status looks wrong

Check ordered, received, and invoiced quantities; due date; active payments; and reversals. Totals and statuses are derived server-side. Correct immutable payment history with a reversal rather than editing it.

Billing cannot be verified

Open **Plan** from inside Shopify Admin and refresh the Shopify App Pricing state. A new or expired merchant fails closed when entitlement cannot be verified. Preserve the displayed error and contact support if the Partner API remains unavailable.

16. Glossary and support

Term	Meaning
Accepted	Units physically accepted and eligible for inventory increase
Available	Shopify inventory available for sale; Shopify already accounts for committed units
Blind count	A physical count that hides the expected quantity
Correction	A new linked compensating record; it does not edit committed history
Dry-run / preview-only	Planivaro records and previews the workflow without changing Shopify inventory
Exact confirmation	Approval tied to one immutable saved operation and payload
Idempotency key	Identifier that prevents an exact operation from being applied twice
Inbound	Supply expected from an open PO or transfer, weighted by its reliability where applicable
Inventory position	Usable inventory plus reliable inbound, adjusted only for independently reconciled external commitments
MOQ	Minimum order quantity accepted by a supplier
Pack size	Quantity multiple in which a supplier accepts an order
Receipt	Immutable record of accepted, damaged, rejected, and missing PO quantities
Shadow mode	Recommendations are measured and shown without automatically driving operational actions
Stocktake	Full or filtered physical inventory count at one Shopify location
Uncertain	The external result cannot yet be proven; new writes are blocked pending reconciliation
Writeback	An explicitly confirmed Planivaro operation that changes Shopify inventory

For help, include the store domain, page, resource or job identifier, approximate time, and the exact message shown. Never send session tokens, OAuth codes, cookies, customer data, or private environment variables.

- Support: [Planivaro support](#)
- App listing: [Planivaro on Shopify](#)

17. End-to-end operating checklist

Use this checklist for the first complete buying cycle or for training a new operator.

- ☐ Open Planivaro from the correct Shopify Admin store.
- ☐ Verify trial or subscription access on Plan.
- ☐ Complete Sync and compare variant and location totals.
- ☐ Import the current supplier CSV template.
- ☐ Resolve rejected, missing, or ambiguous mappings.
- ☐ Generate Reorder suggestions for one location and supplier.
- ☐ Review reason codes, cost, MOQ, pack size, and inbound stock.
- ☐ Enter justified manual quantities where needed.
- ☐ Create exactly one draft PO and confirm it appears once.
- ☐ Export the PO and send it through the normal supplier channel.
- ☐ Select the receiving location before activity begins.
- ☐ Classify accepted, damaged, rejected, and missing units.
- ☐ Review the immutable receipt preview.
- ☐ Keep dry-run, or confirm the exact live operation only when all gates pass.
- ☐ Generate labels for newly accepted units when needed.
- ☐ Create and approve a supplier bill after matching the receipt and invoice.
- ☐ Record external payments without expecting Planivaro to move money.
- ☐ Run a small cycle count and explicitly record zeros.
- ☐ Review transfer, stocktake, and receiving settings independently.
- ☐ Inspect Audit and export the operational ledger.
- ☐ Record any timeout or uncertain result before attempting recovery.

Completion standard: Shopify data is current; supplier mappings are verified; the PO, receipt, labels, bill, and audit record agree; and any inventory change can be traced to an exact confirmed operation.