CTIOLab Inventory Management User Guide

CTIOLab helps your team monitor inventory, manage suppliers and purchase orders, receive stock, complete physical counts, and plan replenishment using Shopify sales. This guide follows the application navigation from Dashboard through Configuration and explains the controls, workflows, and settings available in each area.

The screenshots use a demonstration store. Your products, quantities, dates, suppliers, enabled permissions, and plan details will differ. Check the selected item and location before recording a receipt or completing a count.

Using the application

Open CTIOLab from Shopify Admin. The app has its own navigation bar: **Dashboard**, **Inventory Items**, **Suppliers**, **Purchase Orders**, **Stock Counts**, **Sales Orders**, **Forecast**, **Best Sellers**, and **Configuration**. The Shopify navigation outside the app remains separate. Purchase Orders expands to All Purchase Orders, Receive Purchase Order, Backorders, and Trash. Use the document outline to jump to a chapter or Configuration group.

Search, filters, sorting, column controls, and pagination vary by page. A header checkbox generally selects the loaded rows; do not assume it selects the entire catalog. Check the displayed selected count before a bulk action. Columns manages visible fields and, where offered, their order. Clear filters and Clear dates help distinguish an empty result from a restricted view.

Wait for loading indicators to disappear and summary values to populate before interpreting a report. Synchronization and forecasting can finish at different times. A zero is a result; a dash or loading message may mean a calculation is not ready.

Saving and stock changes. The PO editor saves automatically once you begin entering information. Receiving stock and completing counts affect Shopify inventory. Configuration can affect the whole team and is available to administrators. Review scope, quantities, and locations before committing changes.

1 Dashboard

The Dashboard brings catalog totals, stock alerts, purchasing follow-up, top sellers, and paid orders awaiting fulfillment into one view. Links take you directly to full lists and individual records.

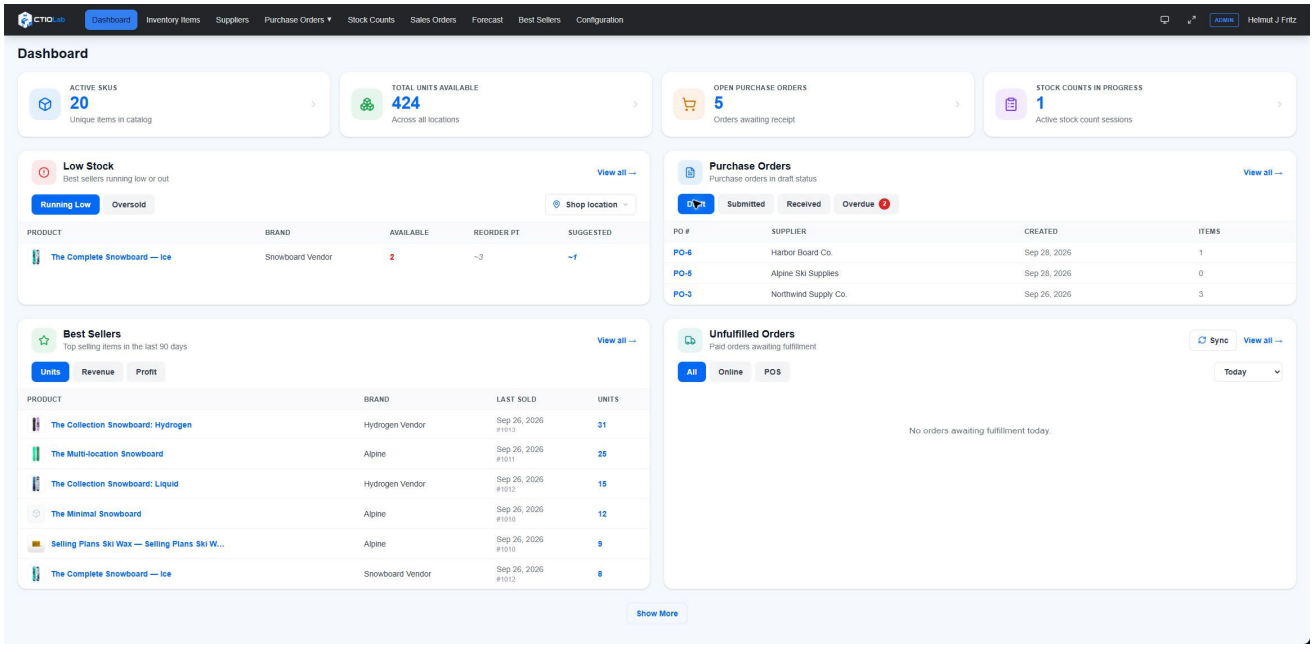


Figure 1 Dashboard overview. Summary cards are at the top, stock and purchasing panels in the middle, and selling and fulfillment panels below.

Summary cards

Card	What it shows	Destination
Active SKUs	Unique items in the active catalog	Inventory Items
Total Units Available	Available units across included locations	Inventory Items
Open Purchase Orders	Orders awaiting receipt; open totals can include drafts	Purchase Orders
Stock Counts In Progress	Active physical-count sessions	Stock Counts

Select a card to investigate its records. Judge stock from quantities rather than product titles: an item named Out of Stock can still have available units.

Low Stock

Running Low focuses on class A best sellers running low or out. **Oversold** identifies available quantities below zero. Use the location selector to check the relevant managed location. Open a

listed item to inspect its stock and replenishment settings. Suggested quantities and calculated points may be shown approximately with a tilde.

Negative available stock can result from commitments exceeding stock, an unreceived delivery, continued selling when out of stock, or a counting discrepancy. Review open POs and the item record before receiving, reordering, or recounting.

View all opens the full **Low Stock Report**. It lists active items at or below their manual reorder point across active locations, so its scope differs from the Dashboard class A alert. An empty Dashboard panel does not prove every item is above its manual point.

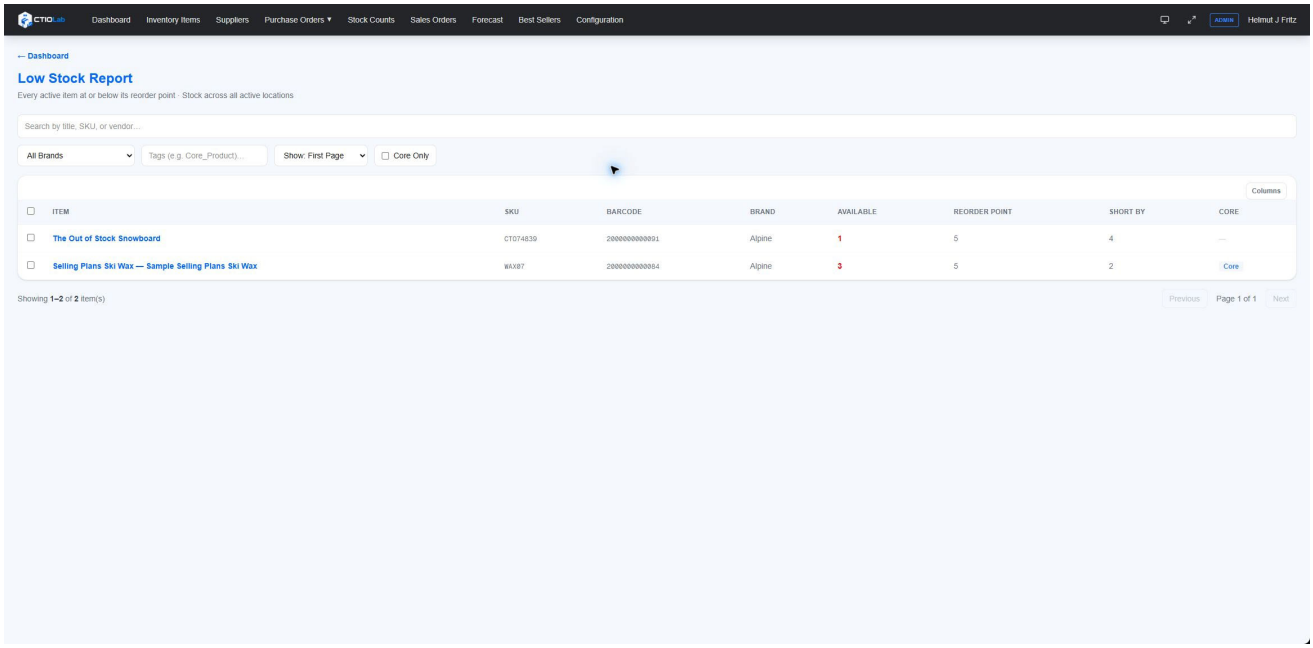


Figure 2 Full Low Stock Report. Search, brand and tag filters, Core Only, and Columns are above the item list.

Search by title, SKU, or vendor; filter by brand or tags; and use Core Only for always-stock items. Choose Show: First Page or Show: All Matching. Columns include item, SKU, barcode, brand, available, reorder point, short by, and core status. For example, 3 available against a point of 5 produces a shortfall of 2. That shortfall is not automatically the quantity Forecast will recommend buying.

Purchase Orders

Switch among **Draft**, **Submitted**, **Received**, and **Overdue**. Draft identifies preparation work. Submitted corresponds to placed POs shown as Ordered on their detail pages. Overdue identifies orders past expected delivery.

Open a PO number for supplier, dates, line items, receiving progress, and history. Use View all for the full list. Confirm dates on the detail page before supplier follow-up or receipt.

Best Sellers

The panel covers the last 90 days. **Units**, **Revenue**, and **Profit** answer different questions: sales volume, sales value, and displayed profit. Item links open inventory details; last-sale dates and order numbers provide context.

Show More expands Dashboard content; **Show Less** restores the compact view. View all opens Best Sellers with a selectable date range.

Unfulfilled Orders

Choose **All**, **Online**, or **POS**, then Today, This Week, This Month, or All Time. An empty Today view can coexist with older unfulfilled orders. Broaden the period to investigate a backlog.

Sync refreshes recently placed or updated orders; its help describes a six-hour window. View all opens Sales Orders with broader import and filtering options. Complete your normal fulfillment work in Shopify.

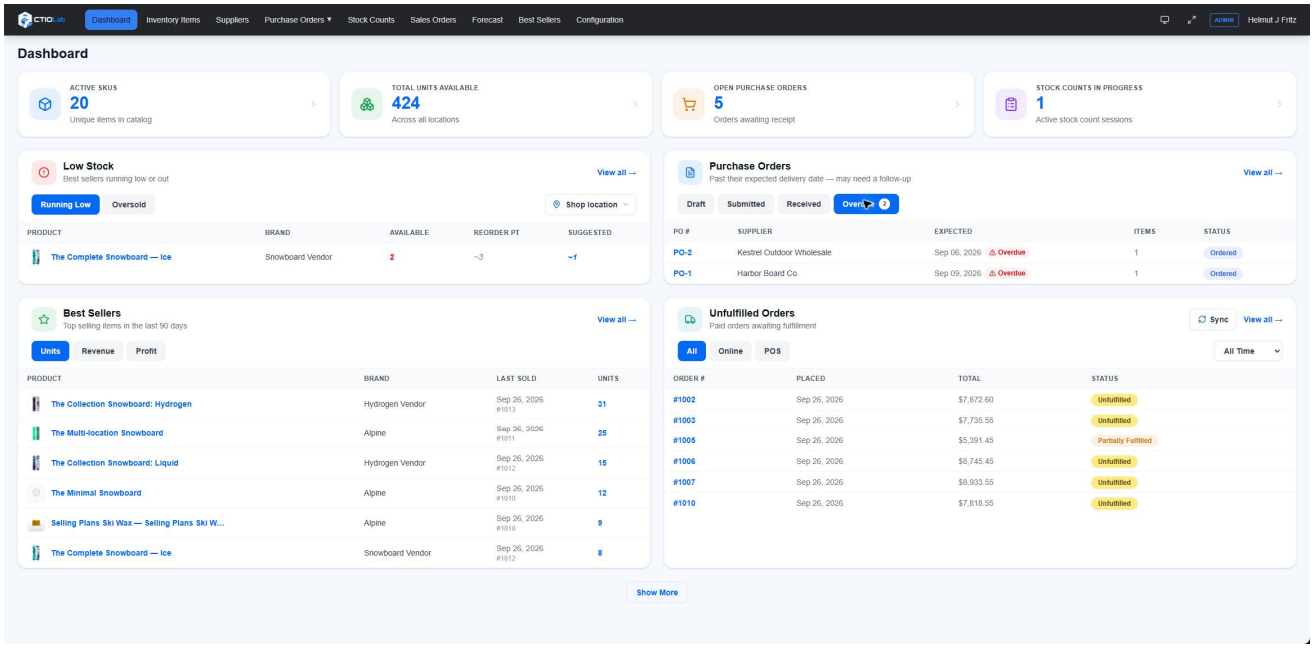


Figure 3 Dashboard with Overdue and All Time selected. These controls reveal older purchasing and fulfillment work.

Daily review

1. Review catalog and available-unit totals for unexpected changes.
2. Check Running Low and Oversold at the relevant location.
3. Open overdue and incoming POs to plan follow-up and receipts.
4. Review Best Sellers to prioritize important products.
5. Broaden the unfulfilled-order period when looking for older work.

Clickable cards and contextual links make moving from an overview to the record requiring attention straightforward.

2 Inventory Items

Inventory Items is the catalog workspace for locating products, comparing stock and value, maintaining replenishment rules, linking suppliers, and selecting items for purchasing or labels.

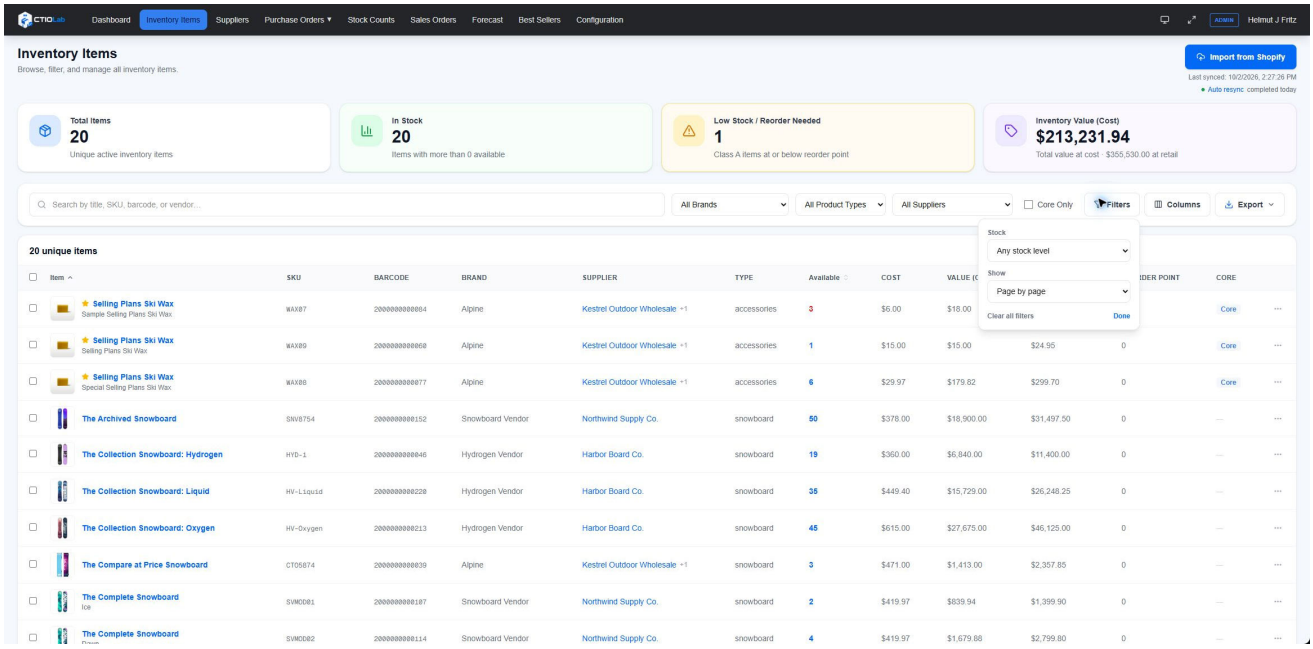


Figure 4 Inventory Items with Filters open. Catalog filters are above the table; stock level and result scope are inside the panel.

Search and filters

Summary values show active items, items with positive available stock, class A low-stock/reorder items, and inventory value at cost with a retail comparison. Available stock and financial value answer different operational questions.

Search by **title, SKU, barcode, or vendor**. Filter by Brand, Product Type, Supplier, or Core Only. Filters adds Any stock level, In stock (more than 0), Out of stock (0 or less), and Oversold (below 0). Choose Page by page or All matching (up to 2,000). Done closes the panel; Clear all filters removes restrictions.

Use the SKU or barcode for a specific variant and check its subtitle. Identical product titles can have different variants, quantities, costs, and suppliers.

Columns and row actions

Columns manages visibility and order, with Reset to Default. Available fields include SKU, barcode, brand, supplier, type, available, cost, value at cost, value at retail, reorder point, and core. Item and Available headers provide sorting. Page sizes are 10, 25, 50, and 100.

A supplier name opens its record. A +N indicator means additional suppliers are linked. Actions offers Open item, Open in Shopify, and Select. Export takes catalog information out of the list.

Bulk actions

Select individual checkboxes or Select all loaded items. The toolbar shows the selected count and offers Clear selection, Mark as Core, Unmark as Core, Sync Selected from Shopify, Create PO(s) from Selected, and Print Labels.

Review selected variants and count before changing core status, preparing POs, or printing. Review the resulting purchasing drafts before ordering. Clear old selections before beginning a new batch.

Shopify synchronization

Import from Shopify refreshes the catalog. Last synced and the Auto resync status link show synchronization context. Selected-item refresh is available from the bulk toolbar. Item locks determine whether imports can overwrite protected local information.

Some purchasing and counting views also synchronize item information while preparing their lists. Wait for those checks to finish before judging quantities or selection choices.

Item detail

Open the item title for variant, SKU, brand, type, core status, description, Shopify source, and View in Shopify. The quantity summary separates Available, On Hand, Committed, and Unavailable.

Quantity	Meaning
Available	Units available for sale after commitments and unavailable stock
On Hand	Physical stock recorded in the inventory context
Committed	Units allocated to orders
Unavailable	Recorded stock not available for sale

For example, an item can have 5 On Hand, 2 Committed, and 3 Available. Do not assume On Hand and Available always match.

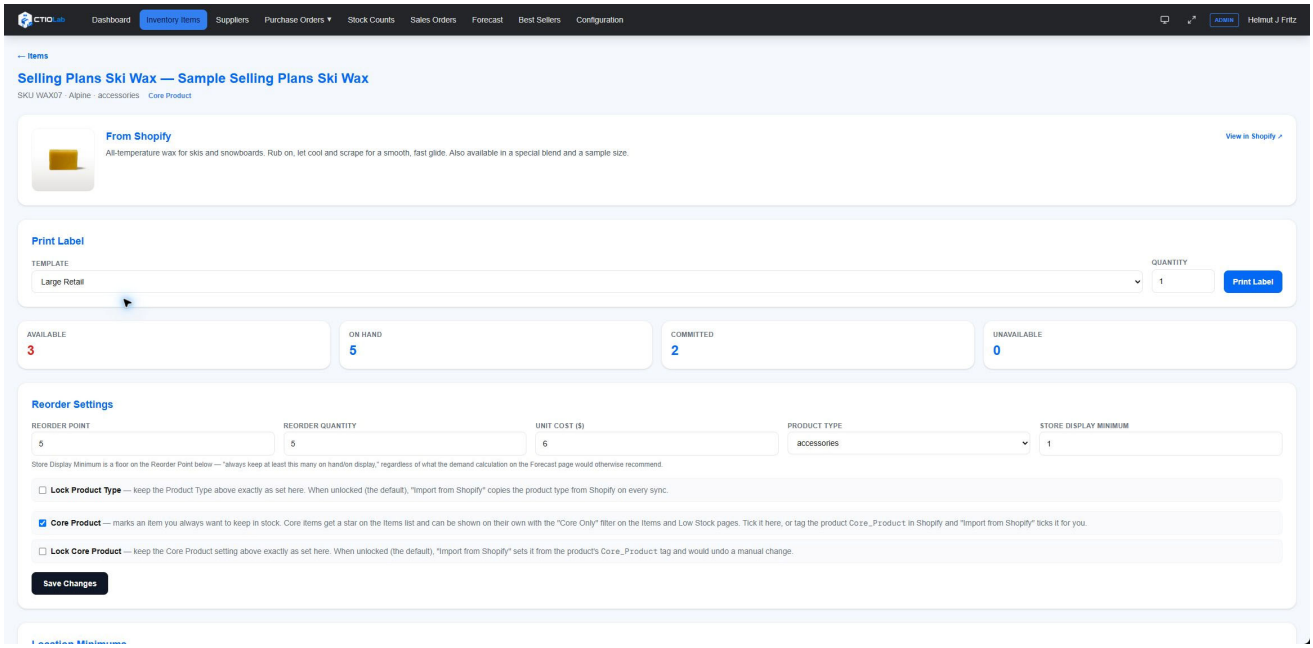


Figure 5 Item detail groups stock, replenishment fields, location minimums, supplier links, and adjustment history.

Replenishment fields

Field	Purpose
Reorder Point	Manual threshold used by manual-point low-stock reporting
Reorder Quantity	Manual replenishment quantity; can initialize the supplier picker
Unit Cost	Item cost in inventory and purchasing context
Product Type	Category used by filters and label defaults
Store Display Minimum	Minimum stock/display level to preserve in replenishment planning
Core Product	Mark an item the team always wants to keep in stock

Update the intended fields and select Save Changes. Keep the manual point separate from Forecast's calculated point, which is shown alongside it in that report.

Lock Product Type preserves the local type against imports. **Lock Core Product** preserves a manual core choice; when unlocked, import can set core status from Shopify's Core_Product tag. Core products display a star and can be isolated with Core Only.

Location Minimums

A minimum protects that location's own stock. Forecast can flag BUY when any location falls below its own floor even if combined stock appears adequate. Leave blank for no floor, then use this section's Save control. This helps maintain display stock while other locations hold backup units.

Supplier links

The supplier section shows supplier SKU, cost, and preferred status. Choose a supplier, enter its SKU and cost, and select Link. Make preferred chooses the supplier used by Forecast and reorder purchasing. Unlink removes an association.

Alternatives remain usable on their own POs at their supplier-specific costs. Lock supplier sync prevents imports overwriting the item's supplier SKU/cost. Check links, preference, and costs when a proposed purchasing group is unexpected.

Printing and adjustment history

In Print Label, choose the template and quantity, then use the browser print dialog with matching paper size. Configuration defines templates and product-type defaults.

Adjustment History records date, quantity change, reason, and resulting quantity. Use it alongside Shopify and receipt records when investigating a discrepancy. Stock accounting, sourcing, rules, labels, and history are available on one page, reducing repeated searches.

3 Suppliers

Suppliers maintains vendor details, purchasing contacts and terms, lead times, dropship information, sourcing, and PO history.

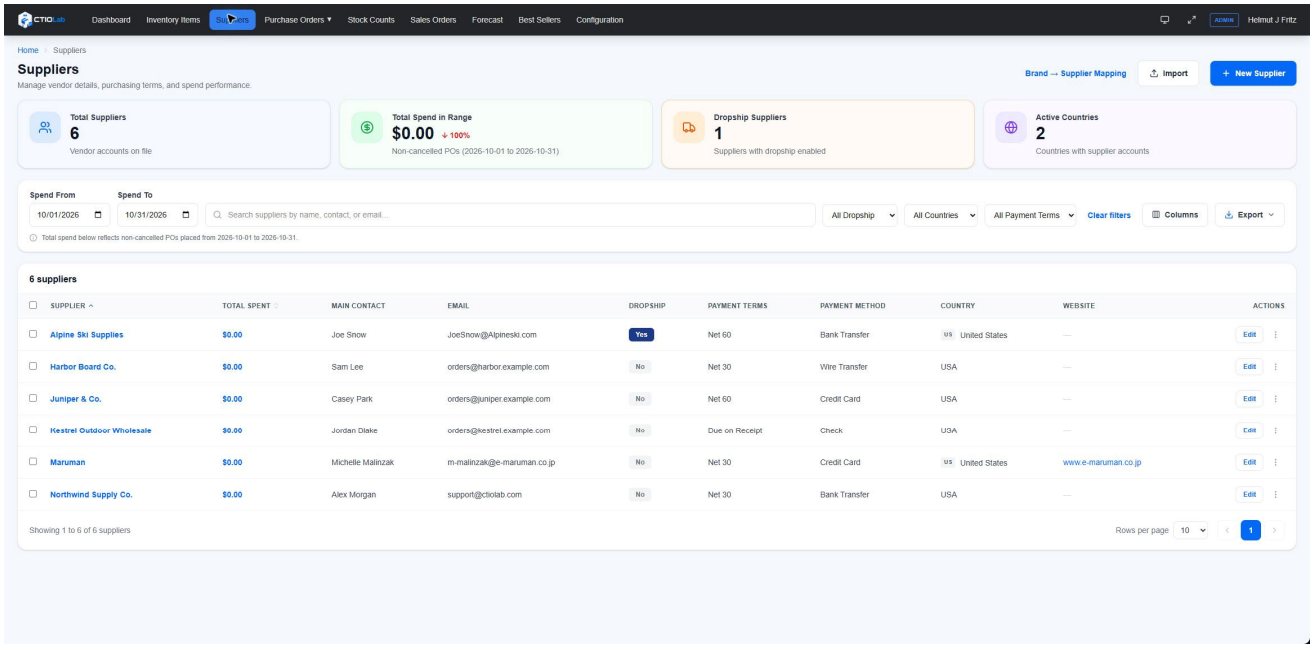


Figure 6 Supplier list. Spend dates, search, dropship, country, and terms filters determine the view.

Supplier list and spend

Cards show Total Suppliers, Total Spend in Range, Dropship Suppliers, and Active Countries. Spend counts non-cancelled POs placed in the selected range. Set Spend From and Spend To before interpreting totals; zero recent spend does not mean there is no purchasing history.

Search by name, contact, or email. Filter by dropship, country, and payment terms. Clear filters, Columns, Export, supplier/spend sorting, and pagination support analysis. Rows show contacts, email, availability, terms, payment method, country, and website.

Edit opens the form. More actions offers View supplier, Edit, dropship on/off, and selection controls. The dropship button changes data rather than filtering the list. Selected rows show a count and Clear selection.

Supplier detail

Open the name for company, contact/address, account, tax type, payment terms/method, lead time, and dropship information. Edit Supplier opens its form.

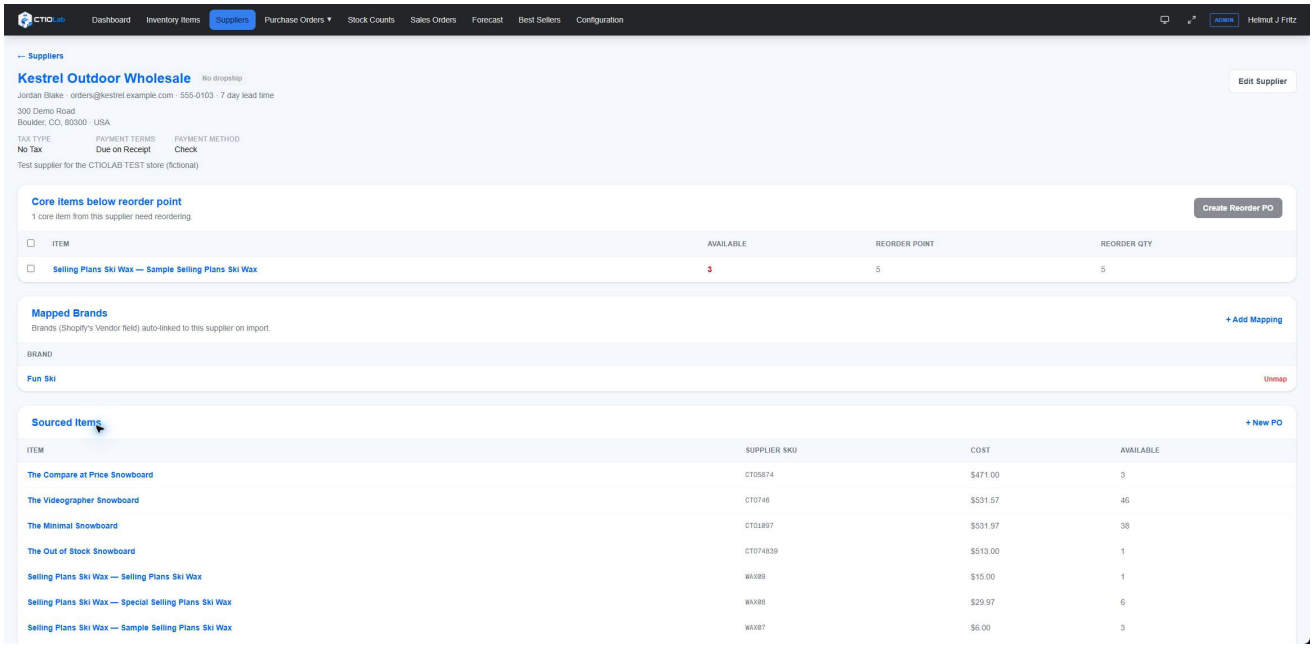


Figure 7 Supplier detail groups core replenishment, mapped brands, sourced items, and purchase history.

Core items below reorder point shows available, manual point, and reorder quantity for always-stock items. Create Reorder PO starts purchasing for that set. Review the draft and quantities before ordering.

Mapped Brands explains automatic vendor-based sourcing. Add Mapping opens mapping; Unmap removes an association. Sourced Items shows supplier SKU, cost, and available quantity, with a New PO shortcut. Purchase Order History links to orders and their dates, status, and expected delivery.

Create or edit a supplier

1. Choose New Supplier, or Edit Supplier on an existing record.
2. Maintain company/address and purchasing fields.
3. Verify the order contact, terms, currency, and lead time.
4. Select Save Changes, or Cancel to leave without saving.

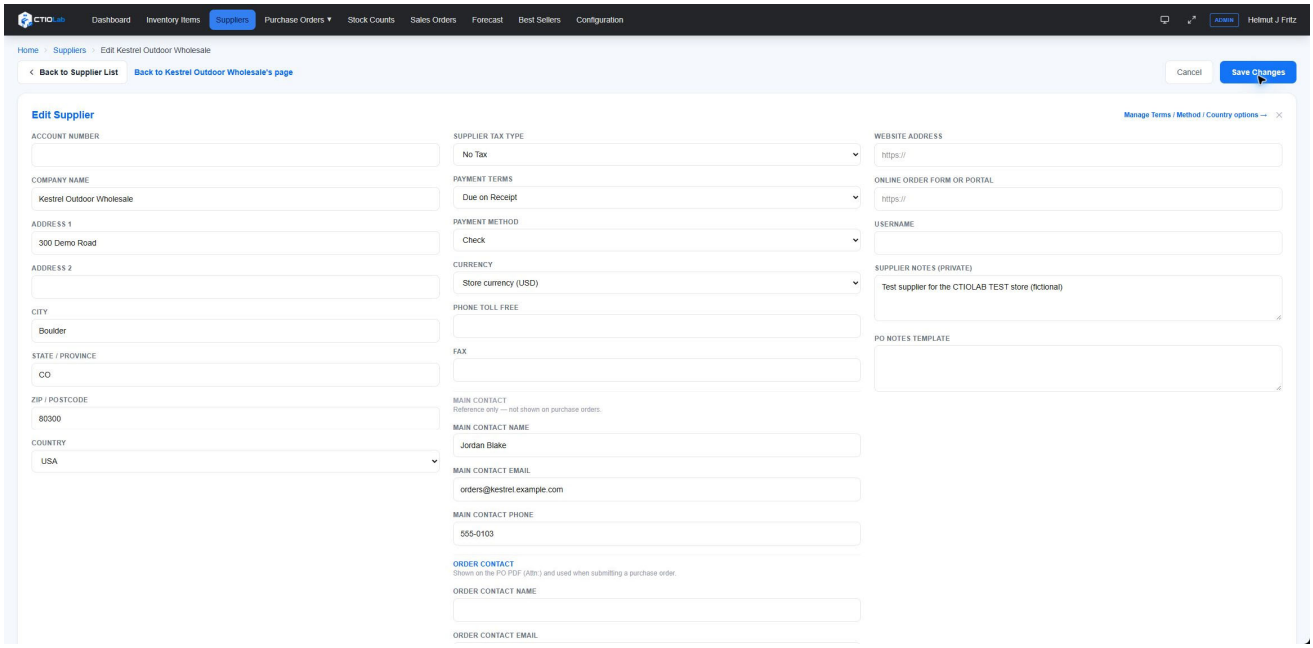


Figure 8 Supplier form. Company and purchasing fields are followed by separate main and order contacts.

Group	Fields
Account and address	Account number, company, address lines, city, state/province, postcode, country
Purchasing	Tax type, payment terms, payment method, currency
Communications	Toll-free phone, fax, main contact name/email/phone, order contact name/email/phone
Portal	Website, online order form or portal, username
Notes	Private supplier notes, PO notes template
Replenishment	Lead time in days, dropship availability, and reliability where applicable

Main Contact is reference-only and is not shown on POs. Order Contact appears as the PO PDF attention contact and is used for submission. Supplier Field Options manages the terms, methods, countries, and tax choices. Consistent spelling improves filtering and country counts.

Dropship reliability

Dropship available records that a supplier can ship directly to a customer. It is informational for staff and does not automatically fulfill orders. Reliability choices are Unrated, DS-A, DS-B, and DS-C.

Rating	Stock-planning intention

Rating	Stock-planning intention
DS-A	Reliable; focus on store/display stock
DS-B	Usually reliable; store stock plus a small backup
DS-C	Unreliable/fluctuating; closer to normal stocking
Unrated	No reliability assessment selected

Forecast Settings defines the online-demand coverage percentage for each rating. Choose a rating that reflects actual supplier reliability.

Spreadsheet import

Import accepts CSV, XLSX, or XLS up to 5 MB. The first sheet is used, and row one must contain headings. The next step matches columns to supplier fields. Common headings and QuickBooks vendor-export headings are recognized; supplier name is required.

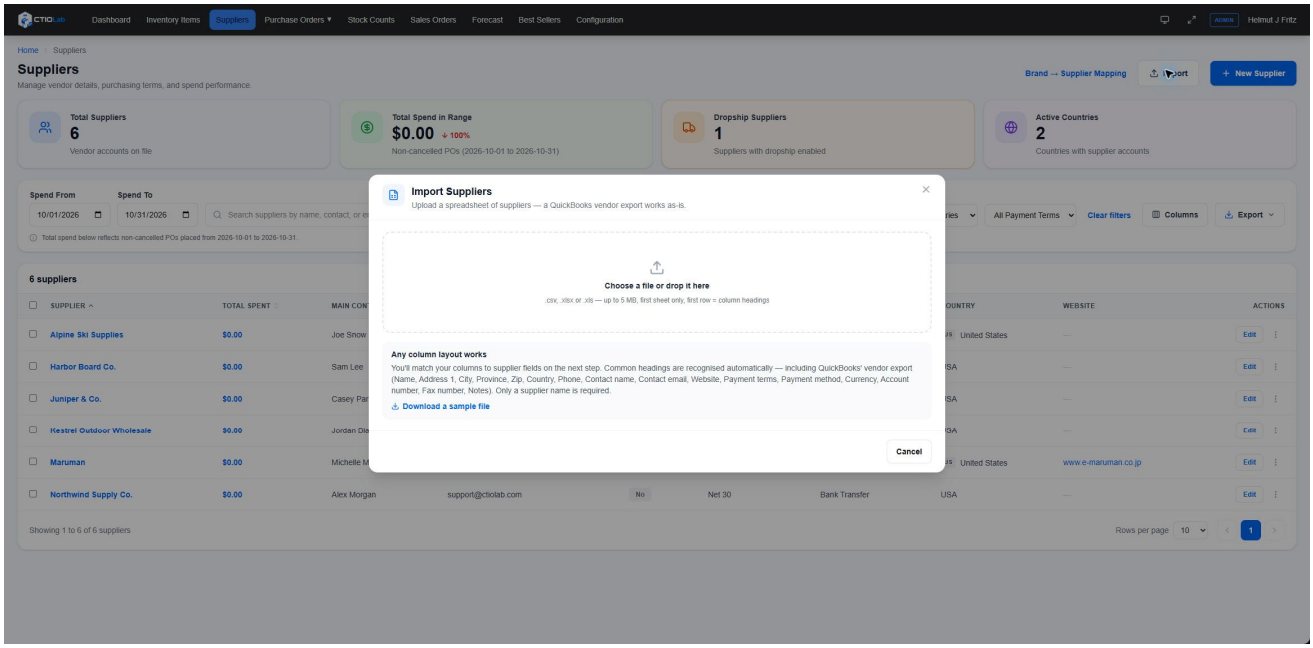


Figure 9 Supplier import entry shows formats, size, sheet, and heading requirements before upload.

Prepare one supplier per row, choose the file, and review the column matching before committing the import. Download a sample file provides an example. Cancel closes the importer. Mapping and supplier shortcuts reduce repetitive sourcing work.

4 Purchase Orders

Purchase Orders supports preparation, placement, receiving, tracking, and organization. Its principal lifecycle is Draft, Ordered, Partially Received, and Received.

List and overview

Open Purchase Orders then All Purchase Orders. Cards show open orders/value, overdue deliveries/value, partially received orders/value, and received-this-month totals. Status views include All, Open, Late, Partially Received, Received, Cancelled, and Draft.

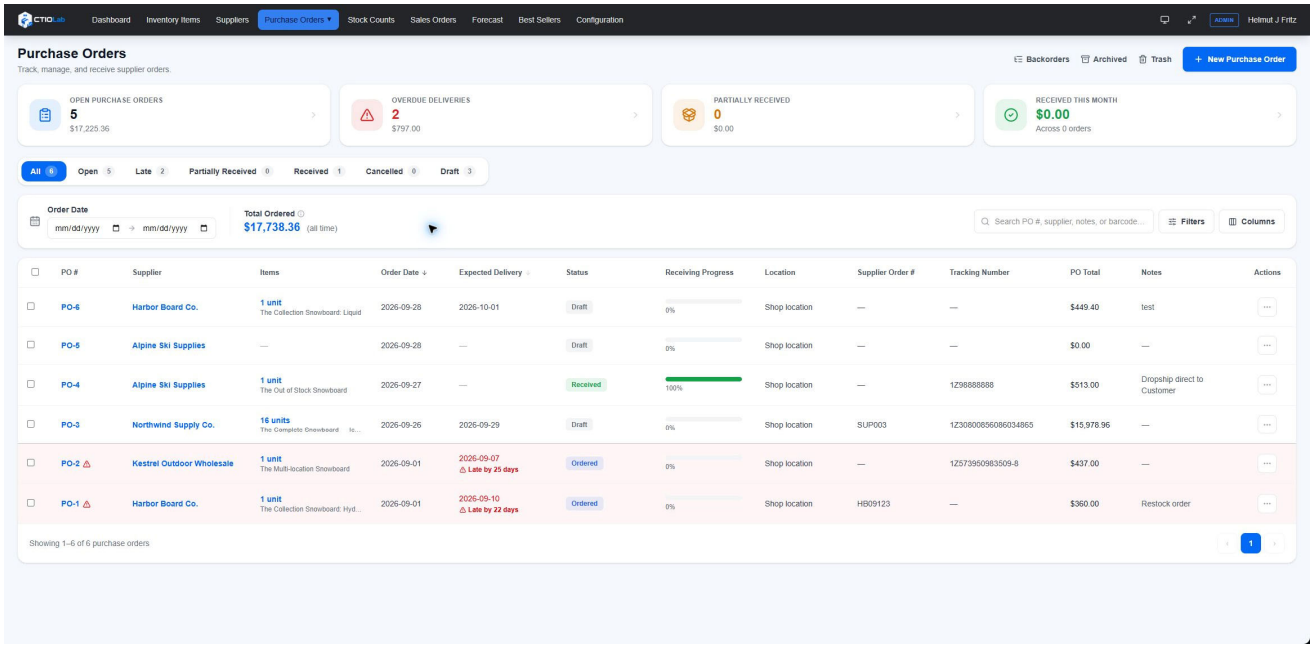


Figure 10 Purchase Orders list with dates cleared. Status, dates, and receiving progress organize purchasing follow-up.

Check order-date restrictions and use Clear dates for older POs. Cards and visible rows can have different scopes. Filters, Columns, sorting, and pagination support the list. Backorders, Archived, Trash, and New Purchase Order are available.

Rows show PO number, supplier, item/unit summary, order date, expected delivery/lateness, status, receiving progress, location, supplier reference, tracking, total, notes, and actions. Open a PO number for detail.

Create and edit an order

New Purchase Order opens a blank form that starts autosaving once information is entered. Existing draft editors also autosave and display save status. Leaving the editor does not necessarily discard saved information.

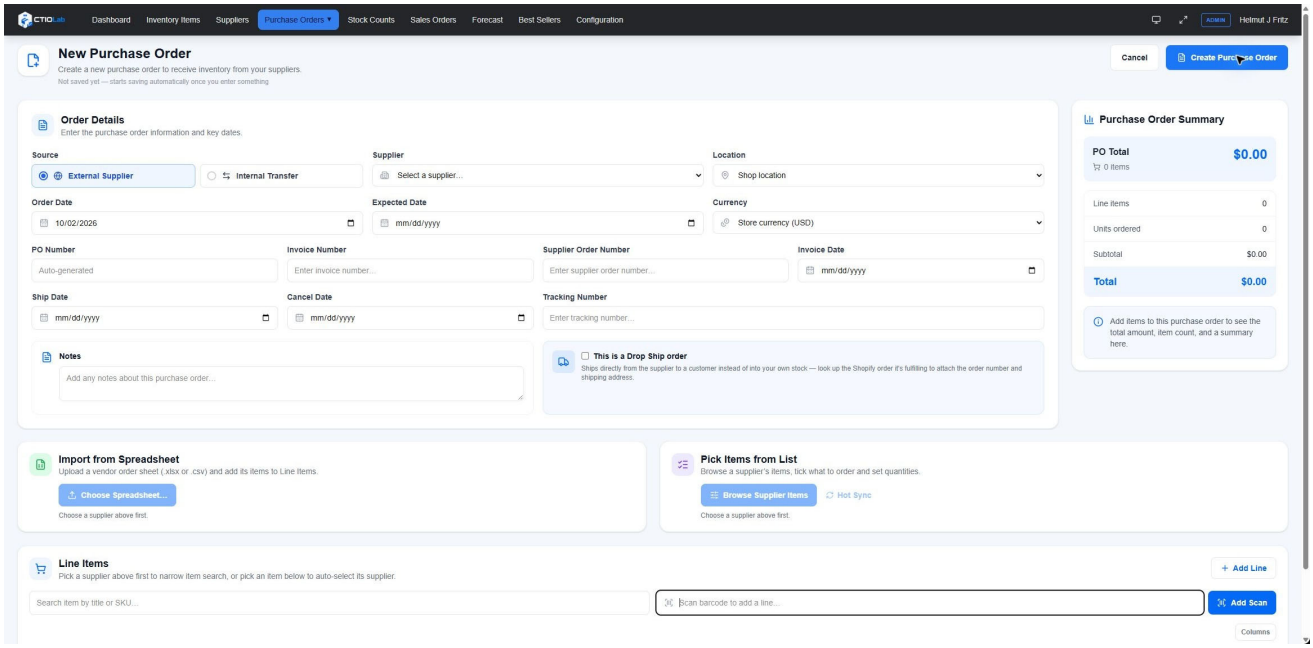


Figure 11 New Purchase Order. Source, supplier, location, and dates precede item entry and the running total.

1. Choose Source and the appropriate supplier/location context.
2. Review dates, currency, and your PO number.
3. Add items through supplier browsing, search, scanning, or spreadsheet.
4. Check quantities, costs, reservations, notes, and totals.
5. Use Create Purchase Order, or Save & View Purchase Order on an existing draft.
6. Review the draft before placement or submission.

External Supplier is the supplier-order path. Internal Transfer is also offered as a source for internal stock movement. Use the fields presented for that source and check the relevant locations before proceeding.

Field	Purpose
Supplier and Location	Sourcing and inventory location context
Order and Expected dates	Timeline and overdue tracking
Currency	Purchasing currency
PO Number	Your identifier, which can be overridden
Supplier Order Number	Supplier's separate order reference
Invoice Number/Date	Invoice references
Ship and Cancel dates	Additional timeline information

Field	Purpose
Tracking Number	Shipment reference
Notes	Order-specific instructions
Drop Ship	Associate supplier-to-customer purchasing

Drop Ship looks up the Shopify order being fulfilled to attach its number and shipping address. Check that association carefully; it is different from a receipt into your own stock.

Add and maintain lines

Browse Supplier Items opens a supplier-specific picker. Check items, adjust quantities, and choose Add to Line Items. Initial quantities use reorder quantity or 1. Only at or below reorder point narrows the picker. Items already on the PO are marked with their current ordered quantity. Cancel leaves without adding selections.

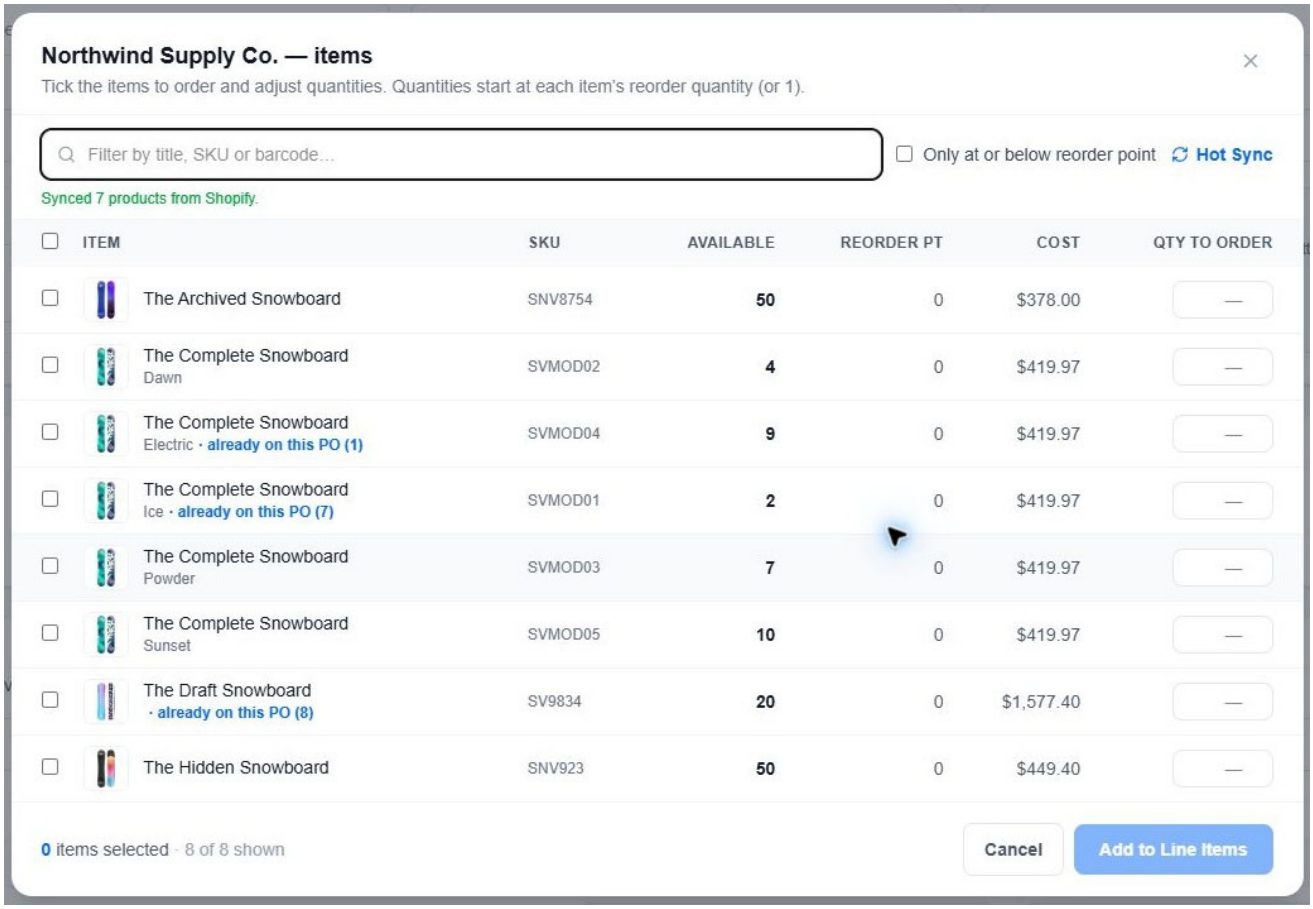


Figure 12 Supplier picker shows available units, manual reorder point, cost, quantity, and existing PO lines.

The editor supports title/SKU search, barcode entry, Add Line, and Add Scan. Supplier context narrows item search. Lines show item, barcode, current quantity, ordered quantity, cost, line total,

reservation, and removal. Change selects a replacement; Remove removes a line. Columns adjusts the view.

Reserve for order associates a line with a customer order. Verify the reservation before purchasing. Choose Spreadsheet accepts XLSX or CSV vendor order sheets; choose the supplier first and follow item-matching prompts. Creating missing Shopify draft products requires optional write_products permission.

Hot Sync and individual sync controls refresh item information. Wait for them before interpreting current quantities. The summary totals line count, ordered units, subtotal, and total.

Detail and status actions

Details include lifecycle timeline, supplier contact, ship-to location, expected delivery, totals, dates, supplier reference, tracking, terms, lines, receiving progress, packing slips, notes, and activity history.

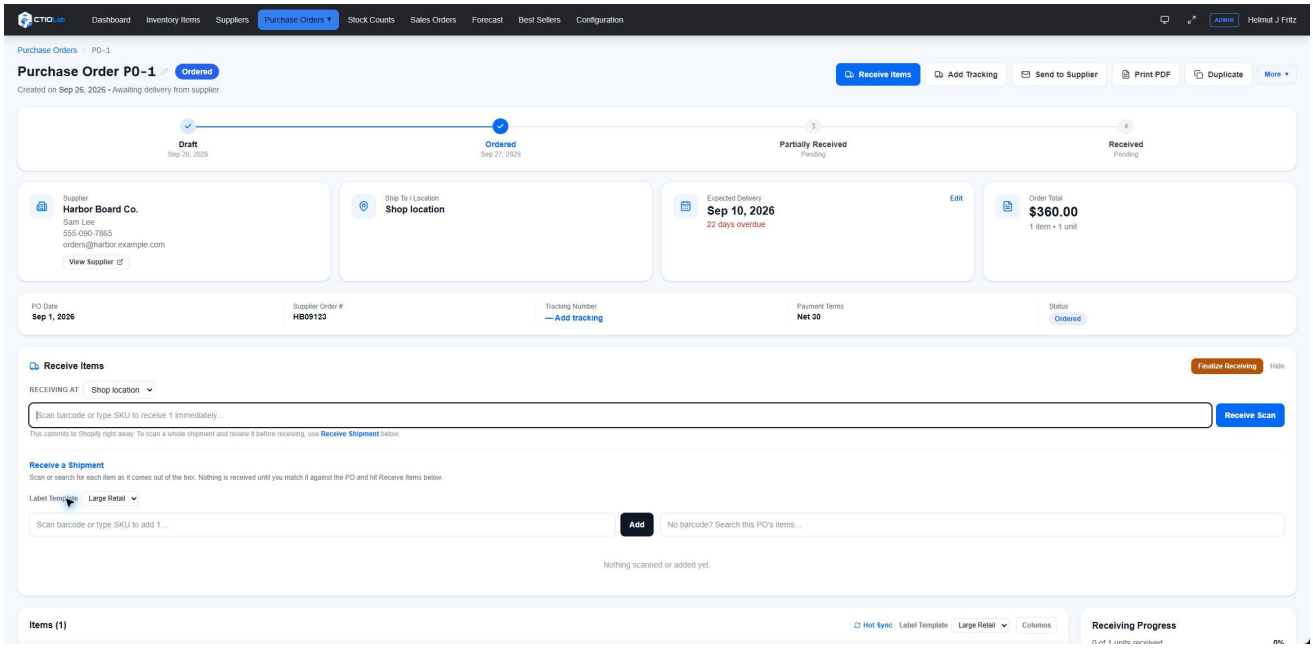


Figure 13 Ordered PO detail. Receiving location and line progress provide the context for recording a delivery.

Action	Use
Mark as Ordered	Place a prepared draft into the ordered stage
Send to Supplier	Start supplier submission; verify recipient and document before sending
Print PDF / Download PDF	Produce the PO document
Duplicate	Start an order based on an existing PO and review it
Edit / Edit Details	Maintain permitted fields for the current status

Action	Use
Add Tracking	Record shipment tracking
Receive Items	Open receiving for an eligible PO
Finalize Receiving	Finish the receipt process and identify outstanding shortages
Cancel PO	Cancel an order when appropriate
Archive	Hide it from the main list without changing the order itself
Move to Trash	Move an eligible record into recovery

Actions depend on status, and More holds additional choices. Activity History records events and staff identity for follow-up.

Receiving

Receive Purchase Order lists placed orders ready to receive, with received/remaining units, status, location, totals, and Receive links.

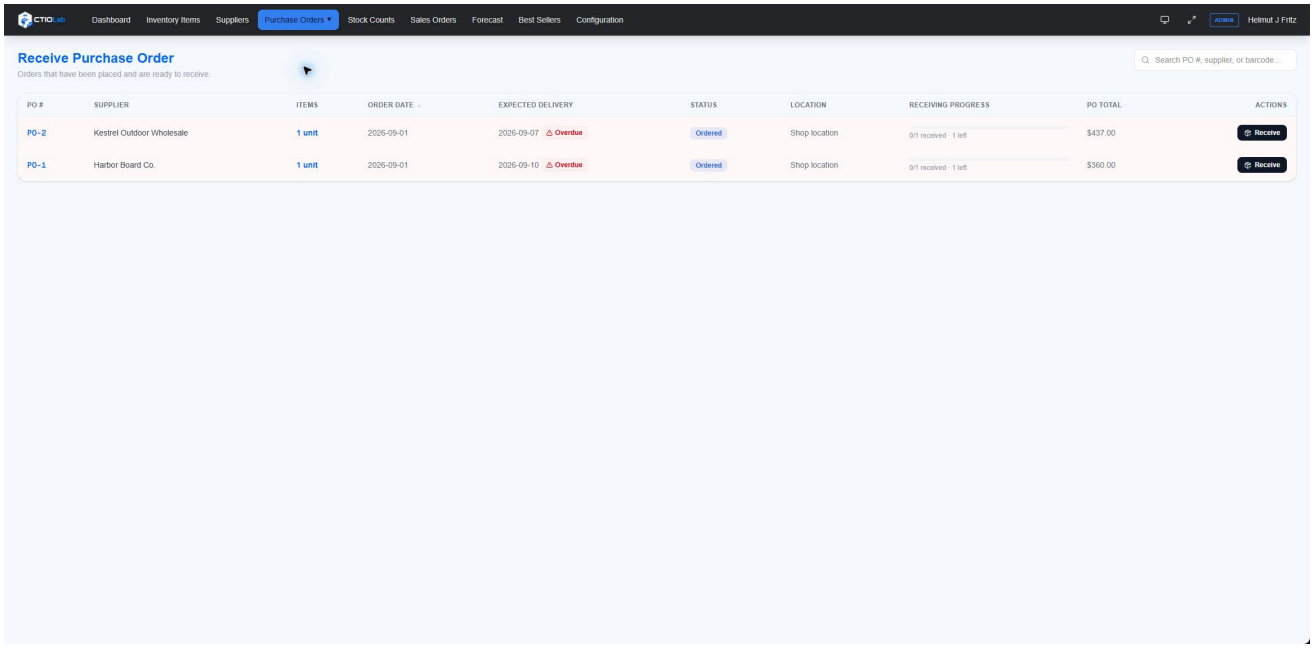


Figure 14 Receiving queue shows remaining units and location before opening a PO.

Choose Receiving At on the PO and verify the actual inventory destination. The two scan paths have different commitment timing.

Immediate Receive Scan. Scan a barcode or enter a SKU in the immediate field and use Receive Scan. The app states this commits to Shopify right away. Use it only when item, quantity, and location are already correct.

Receive a Shipment with review. Scan/search items from the box into the shipment section, match and review against the PO, verify quantities and destination, then use its final Receive Items action. That section states nothing is received before the final action. This provides a checkpoint for a mixed shipment.

Per-line quantity entry supports Receive and Receive & Print Label where available. Select the label template before printing with a receipt. Progress and ordered-versus-received quantities show what remains. Packing Slips offers Scan / Upload for supporting documents. Update tracking and notes as needed. Before Finalize Receiving, resolve the delivered quantities and remaining shortages.

Backorders

Backorders lists items still short after a PO was finalized. Filter by brand, supplier, ordered dates, and Show cancelled. Reopen the PO for later receipt or cancel it when the item will not arrive. An unreceived open PO is not automatically a finalized backorder.

Archive and Trash

Archived hides POs from the main list until unarchived, without changing the order itself. Cards distinguish received/closed, still open, and draft/cancelled records; supplier filtering is available.

Trash holds removed POs until restoration or permanent removal. Cards include drafts, cancelled records, and older-than-30-days candidates. Age does not mean automatic deletion. Restore a needed record; permanent removal is a separate decision. Archive and Trash serve different purposes.

Status badges, overdue indicators, progress, and supplier links simplify follow-up. Supplier browsing, spreadsheets, and scanning support different staff workflows.

5 Stock Counts

Stock Counts guides item selection, counting by physical area, reviewing differences, and applying the result to Shopify.

List and setup

Cards show total counts, in progress, completed, and items counted this month. Filter by dates, name, and All/In Progress/Completed/Draft/Archived status. Open a count name or View. The list shows started/completed dates, locations, items counted, pagination, Trash, and Start New Count.

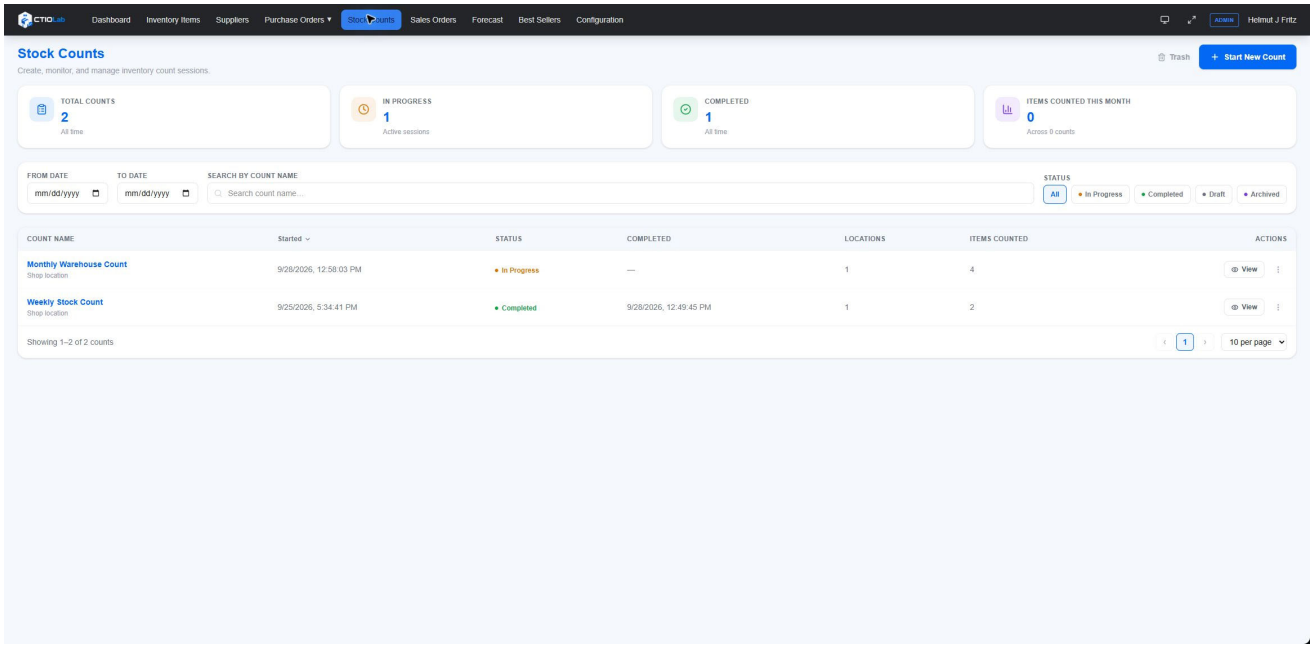


Figure 15 Count list separates active sessions from completed results using status and date filters.

Start New Count asks for Count name, Shopify inventory Location, Count type, and optional notes up to 500 characters. The form then asks which items to include.

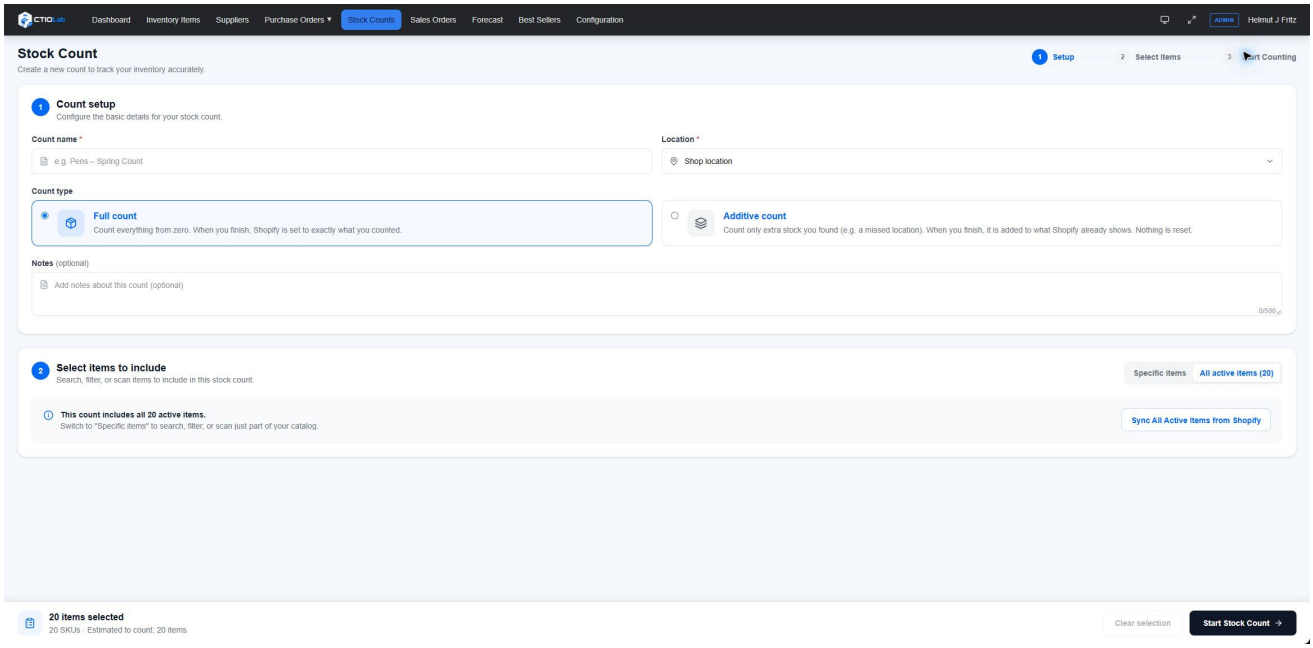


Figure 16 Count setup. Full and Additive types have different inventory effects when completed.

Type	Effect on completion	Typical purpose
Full count	Count from zero and set relevant stock to the counted result	Physical inventory reconciliation
Additive count	Add counted extra units to what Shopify already shows; nothing is reset	Stock found in a missed area

Choose the type deliberately. Additive counting is not a replacement physical count, and a full count is not simply an extra-stock adjustment.

The row More actions menu offers Rename and Move to Trash. Completed counts also offer Archive for organizing finished work. The count detail has a rename control beside its title.

Select the count scope

Choose All active items for an active-catalog count or Specific items for a targeted count. Specific items supports search, barcode/SKU entry with Add, Brand, Product Type, and More Filters for Tag is and Tag is not.

Filtering loads matching products and can synchronize them from Shopify, but does not select them automatically. Check individual products or use Select all N matching where offered. Review the selected SKU count and estimated items before Start Stock Count. Clear selection resets selection. Sync All Active Items from Shopify refreshes the all-active scope.

A count must include the intended scope at setup. Later zeroing only concerns included items, not unrelated SKUs throughout the catalog.

Record stock by sublocation

The active count shows Setup, Select Items, and Counting stages, plus item scope and remaining items. Choose a physical sublocation such as Shop or Warehouse. These areas organize the counting work within the selected Shopify inventory location.

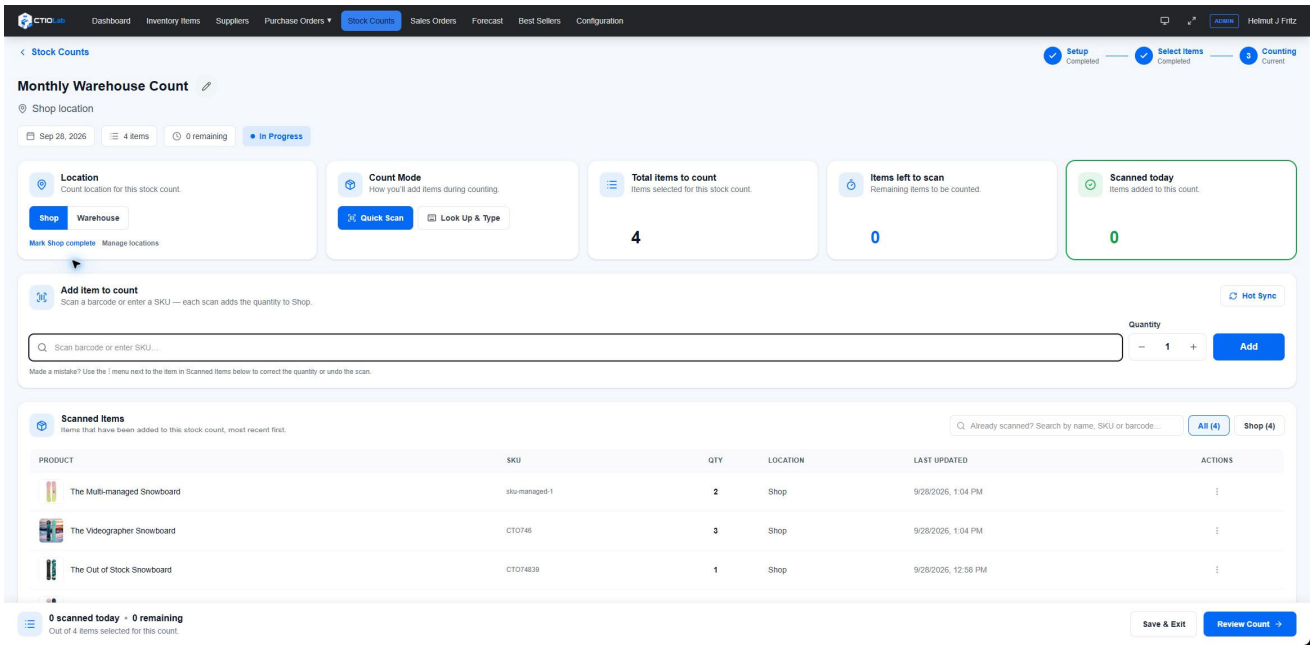


Figure 17 Active count. Sublocation and scan mode are above entry; Scanned Items provides correction actions.

Quick Scan adds the chosen quantity per barcode/SKU scan to the current area. Look Up & Type supports lookup and typed quantities. Check the current sublocation, product, and per-scan quantity before Add. Hot Sync refreshes item context.

The summary distinguishes total items to count, remaining items, and scanned today. Scanned today is not overall progress. Scanned Items shows product, SKU, quantity, area, and update time. Use All or an area view, search for an already-scanned product by name/SKU/barcode, and paginate as needed.

The row Actions menu corrects quantity or undoes a scan. Check existing entries before scanning again if a product may already have been counted. Mark [location] complete finishes an area and can prompt the next. Manage locations opens count-area configuration. Save & Exit leaves the count for later; Review Count opens completion review.

Complete and inspect results

Review Count explains the inventory effect. For a full count, variances across the counting areas are applied to on-hand stock and pushed to Shopify. The confirmation warns completion cannot be undone and flags areas not marked complete.

Review every area's work, correct errors, and resolve omissions first. Update Counted SKUs Only applies counted items. Where set-uncounted-to-zero is offered, it covers only the count's included items. To reconcile all items not found at the Shopify location, start with the appropriate all-active scope. Cancel returns without completing.

Completed counts provide Download Report and per-item system quantity, quantities by area, total, variance, and found/location notes. Zero variance means the counted result matches the displayed comparison.

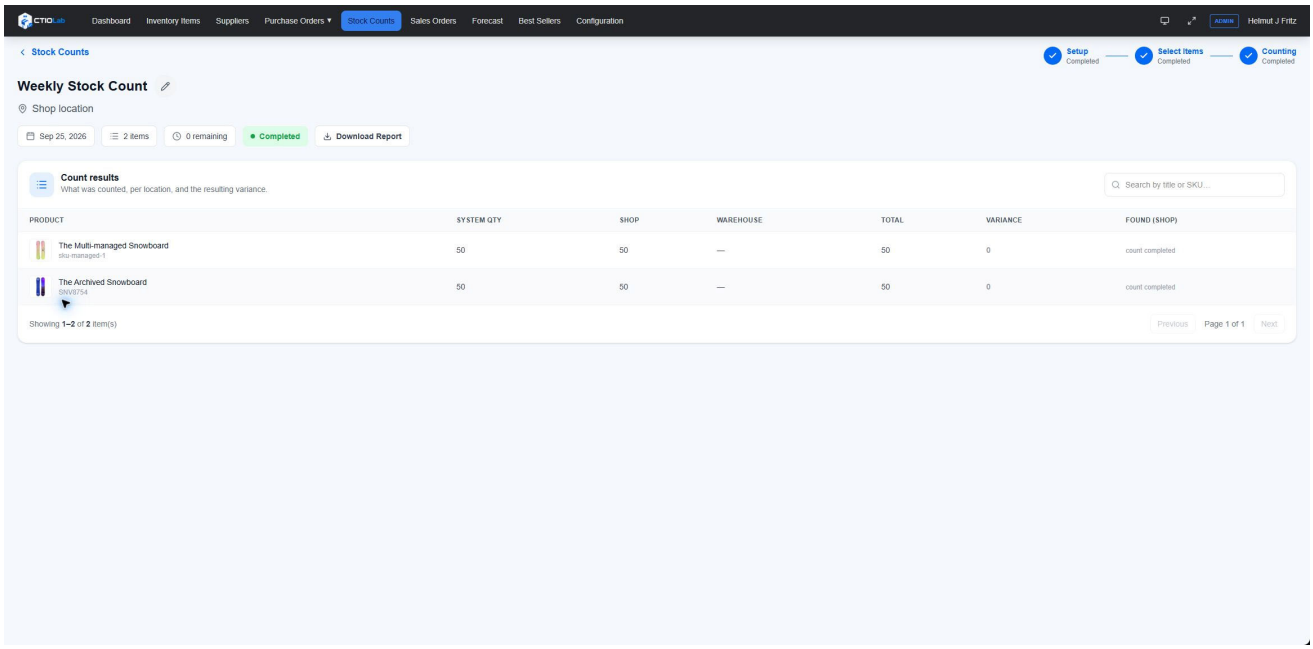


Figure 18 Completed results put system quantity, physical totals, and variance together.

Trash holds removed counts until restored or permanently removed. It provides location/status filters, Columns, summary information, and Empty Trash. Review permanent-removal decisions carefully.

Guided stages, scan corrections, area completion, and the final stock-impact confirmation help staff resolve mistakes before applying inventory changes.

6 Sales Orders

Sales Orders imports Shopify order information for item-level analysis and Forecast. Cancelled/refunded quantities are netted out rather than deleting the historical records.

Imports and filtering

Sync recent (7 days) refreshes recent data; Import last 12 months brings in a broader history. These windows differ from Dashboard's recent-order Sync. Choose the appropriate import and allow it to finish.

Cards show orders excluding cancelled, net units after returns, displayed gross sales, and online-store orders. Set From/To or Today, 7 days, 30 days, 90 days, or 12 months. Clear dates removes the period restriction. Search by order number, customer, or SKU.

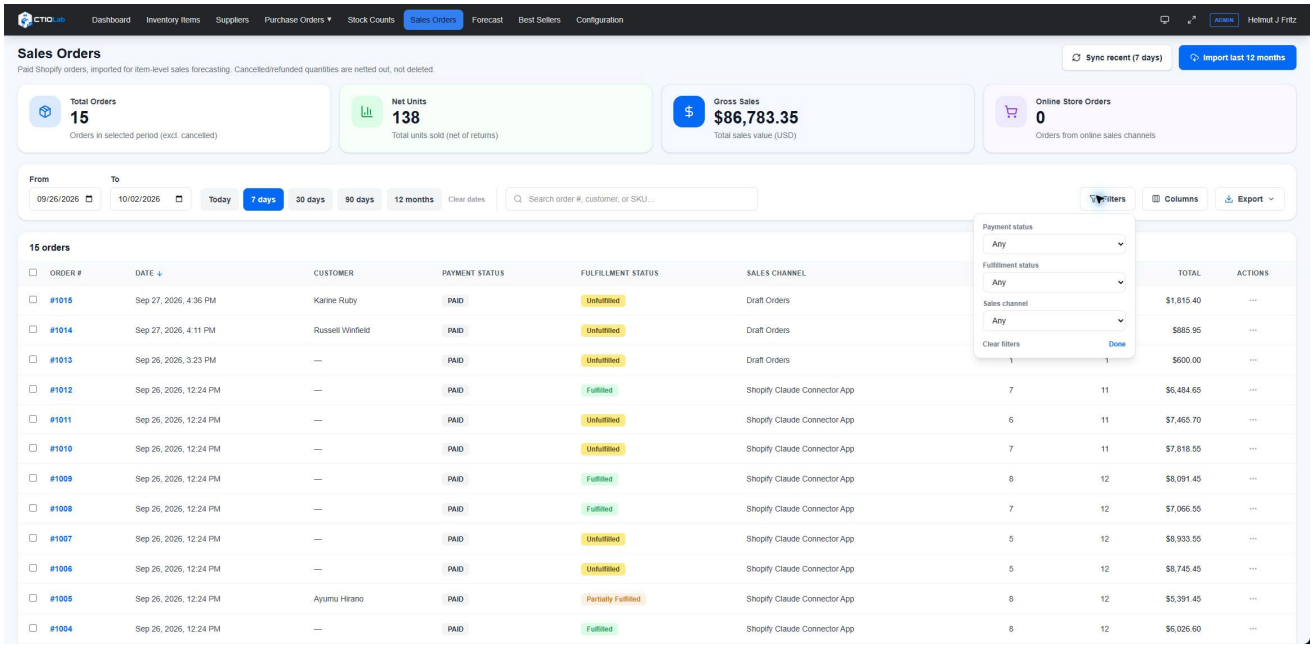


Figure 19 Sales filters separate payment, fulfillment, and channel from dates and search.

Filters offers payment status (Paid, Authorized, Partially refunded, Refunded, Pending, Voided), cancelled orders, fulfillment status (Unfulfilled, Partially Fulfilled, Fulfilled, In Progress, On Hold, Scheduled, Request Declined), and channel. Channels include Online Store, Point of Sale, POS iPhone, Draft Order, Faire, and another app. Clear filters resets restrictions; Done closes the panel.

Lines and export

Rows show number, date, customer, payment/fulfillment status, source channel, line count, net units, total, and actions. Select an order number to expand its lines in place. Lines show SKU, title, quantity, refunded, net, unit price, and matching status.

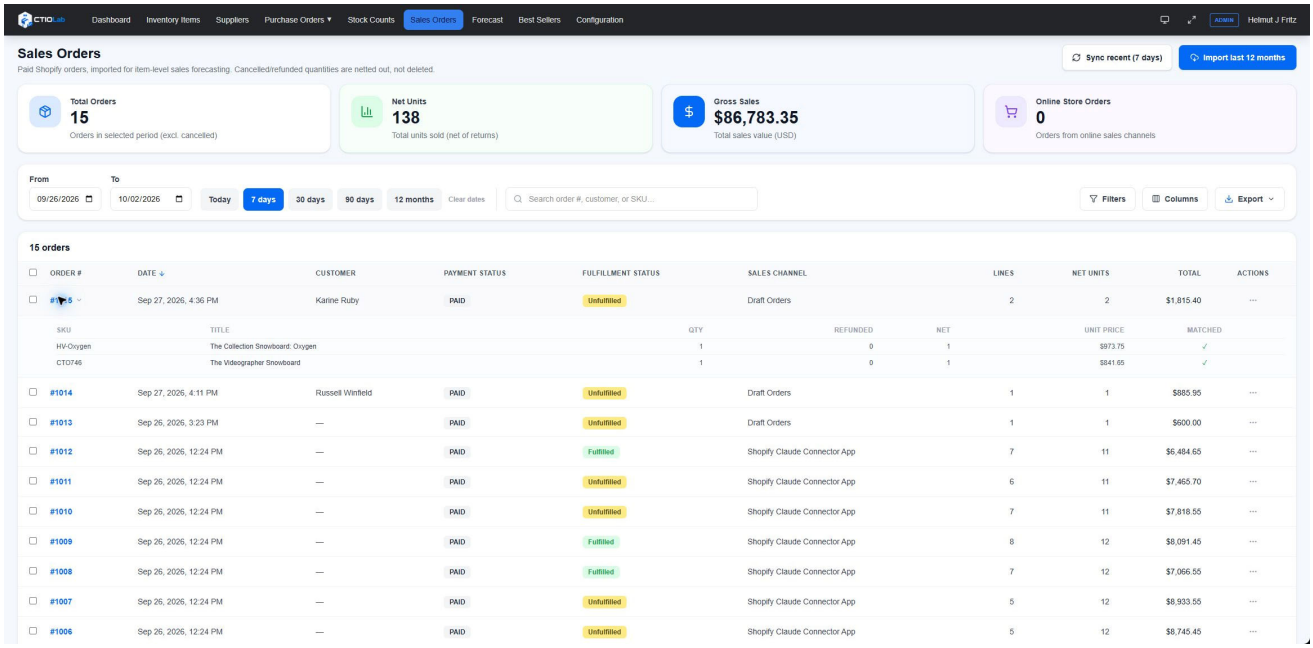


Figure 20 Expanded sales lines expose net quantities and catalog matching without leaving the list.

Use matching status to check whether a sale connects to the expected inventory item. Investigate identifiers when sales are absent from the intended product's analysis.

Actions provides Show/Hide line items, Open in Shopify, and Select for export. Checkboxes select orders; Columns adjusts the view; Export takes data out. Page sizes are 15, 25, 50, and 100.

Use Open in Shopify for operational order work, including normal fulfillment. For Forecast, inspect net quantities and catalog matching rather than only gross order totals.

7 Forecast

Forecast combines sales demand, inventory, classification, supplier lead times, inbound stock, and replenishment rules into item-level purchase recommendations. It prepares supplier-grouped drafts while retaining a review checkpoint.

Load a report

Choose From/To or 30d/90d/365d. Narrow by Brand, Product Type, Supplier, Template, Include Tags, or Exclude Tags. Configuration can pre-fill template and tags; the report's choices remain editable and clearable.

For a large catalog, narrow the scope first. Show all items anyway (may take a while) loads the full catalog when needed. Wait for both the table and proposed-order calculation: populated rows do not necessarily mean the summary cards are ready.

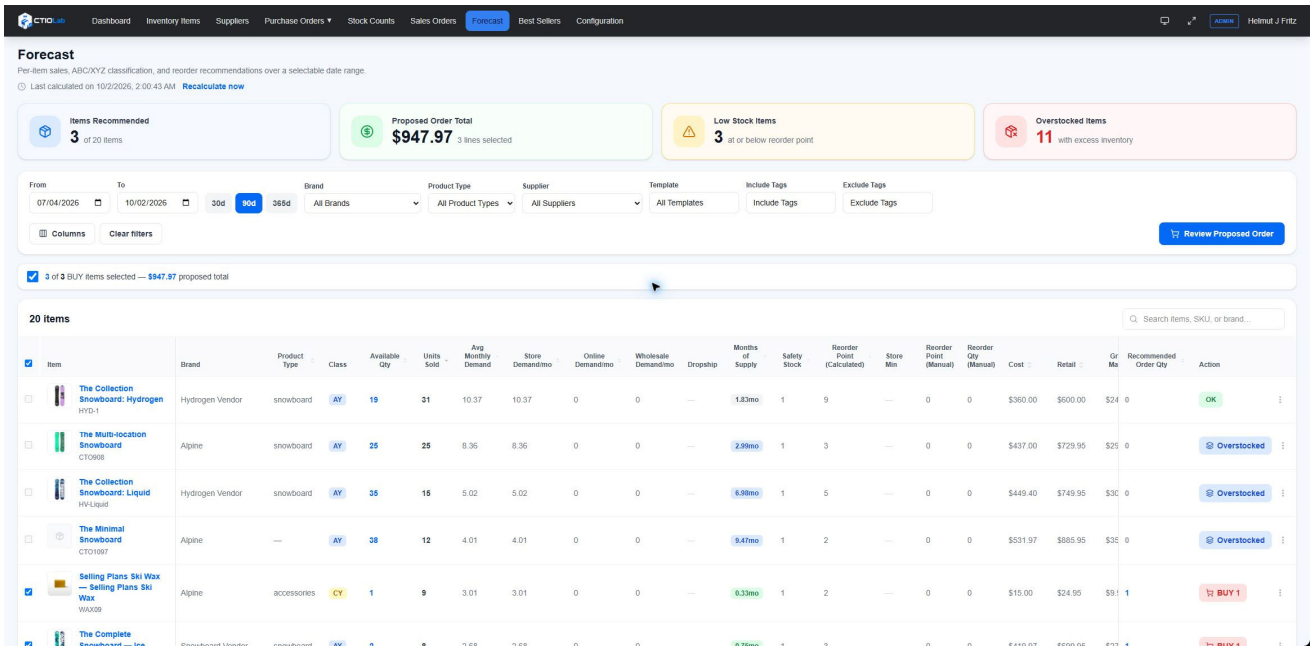


Figure 21 Forecast combines report filters and recommendation cards with item stock, sales, and purchasing metrics.

Classifications

ABC ranks items by gross-profit contribution. A covers the first cumulative band, B the next, C the remainder. XYZ measures variation in monthly sales: X is steadiest, Y intermediate, Z most variable. AY combines A profit contribution and Y sales variation.

Classes recalculate nightly or through Recalculate now / Recalculate classes now. The report shows the last calculation. A blank class can occur for an item without a calculated classification. Configuration supplies an unclassified safety-stock value.

Changing report dates and recalculating classes are different operations. Class settings describe monthly variation over the last 12 months, and cutoff changes apply at recalculation.

Cards and metrics

Items Recommended counts recommended items in scope. Proposed Order Total reflects selected purchasing lines. Low Stock Items and Overstocked Items reflect the report's replenishment and stock-band rules. These can differ from Dashboard class A alerts, manual Low Stock reporting, and supplier-core alerts.

Group	Fields
Identity	Item/SKU, brand, product type, class
Stock	Available, quantity on order, store minimum, inventory value
Demand	Sold units, average monthly demand, Store/Online/Wholesale demand per month
Coverage	Months of supply, safety stock, calculated reorder point, dropship context
Manual rules	Manual reorder point and reorder quantity
Purchasing	Cost, retail, gross margin, preferred supplier, lead time in days
Recommendation	Order quantity and action such as BUY, OK, Overstocked

Months of supply relates available stock to average demand. No-demand items may show a dash. Lead time and safety stock help explain calculated points. On-order units provide inbound context; a draft is different from a placed supplier order.

Gross Margin on this table is a per-item cost/retail comparison. Best Sellers Profit is a period-sales measure. Do not treat them as interchangeable accounting totals.

Manual and calculated thresholds. An item can be below its manual point yet have no Forecast recommendation. Read calculated point, manual rules, minimums, inbound units, and action together. Manual/core reorder workflows and demand-based Forecast serve different planning purposes.

Create proposed purchasing drafts

1. Choose report scope and period, then wait for calculations.
2. Review BUY items, quantities, preferred suppliers, costs, and inbound stock.
3. Select Review Proposed Order.
4. Inspect supplier groups and uncheck items not needed now.
5. Confirm selected count and proposed total.
6. Select Create Purchase Order(s) when ready.
7. Review and edit the drafts before placing or sending them.

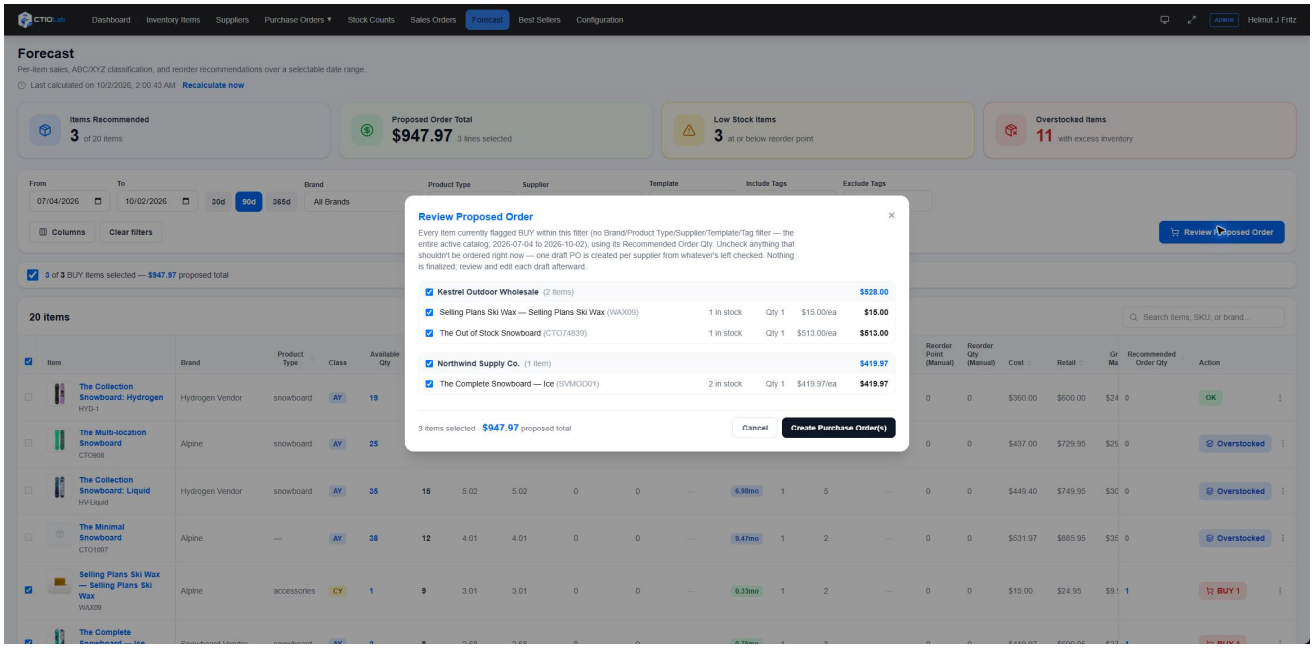


Figure 22 Proposed-order review groups BUY items by supplier with quantities, costs, and group totals.

The review uses BUY items in the current filter/date scope and their Recommended Order Qty. It creates one draft per supplier from checked lines and does not finalize them. Cancel closes without creating POs. Check item-level supplier preferences and costs when a group is unexpected.

8 Best Sellers

Best Sellers ranks the top 25 selling items for a selected period by Units Sold, Revenue, or Profit. It supports merchandising and replenishment alongside Forecast.

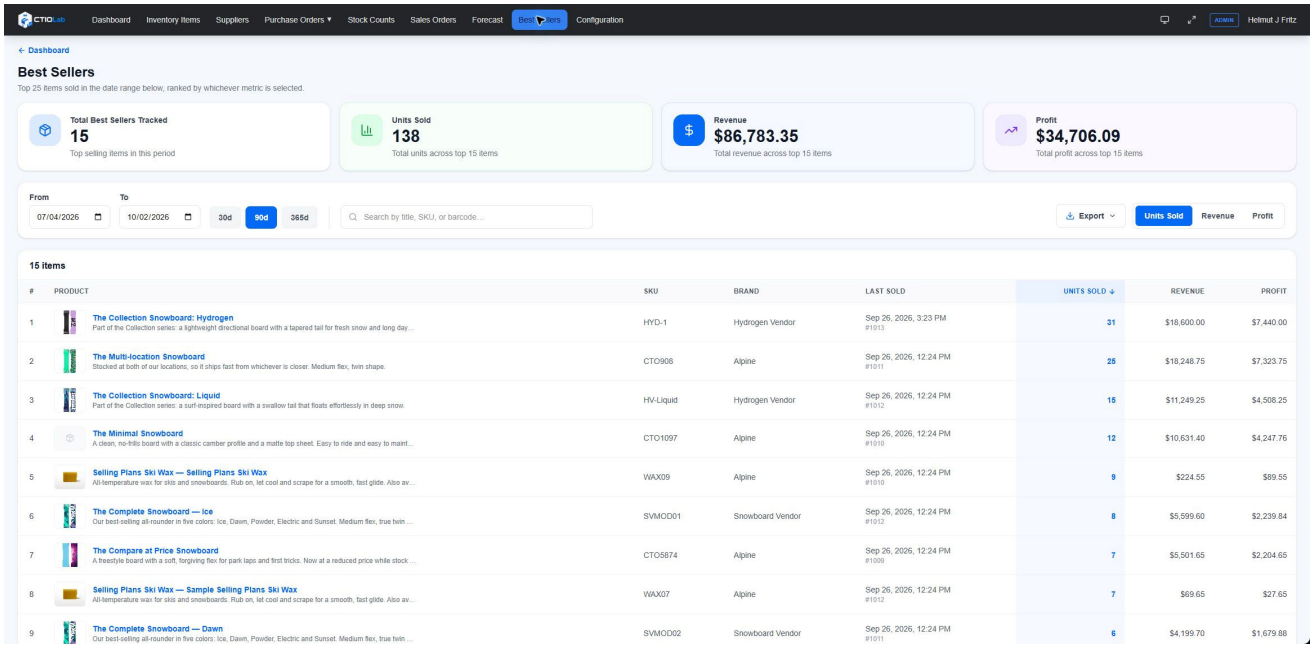


Figure 23 Best Sellers combines dates and ranking choices with item totals and last-sale context.

Set From/To or 30d/90d/365d. Switch the metric while keeping dates constant for a fair comparison. A low-priced high-volume product may rank above a board by units and below it by profit.

Cards show tracked count and total units, revenue, and profit across the report's top items, not necessarily every catalog product. Rows show rank, product/variant/description, SKU, brand, last-sale date/order, units, revenue, and profit. Open an item for inventory detail; Export supports further analysis.

Use Units Sold for frequency, Revenue for sales value, and Profit for the application's displayed contribution. Review cost information and your accounting reports for wider financial decisions.

9 Configuration

Configuration manages shared operational rules. Its overview shows sixteen settings groups, templates, and active locations. Choose a group from the left navigation. Changes can affect imports, forecasting, purchasing documents, labels, locations, and staff access.

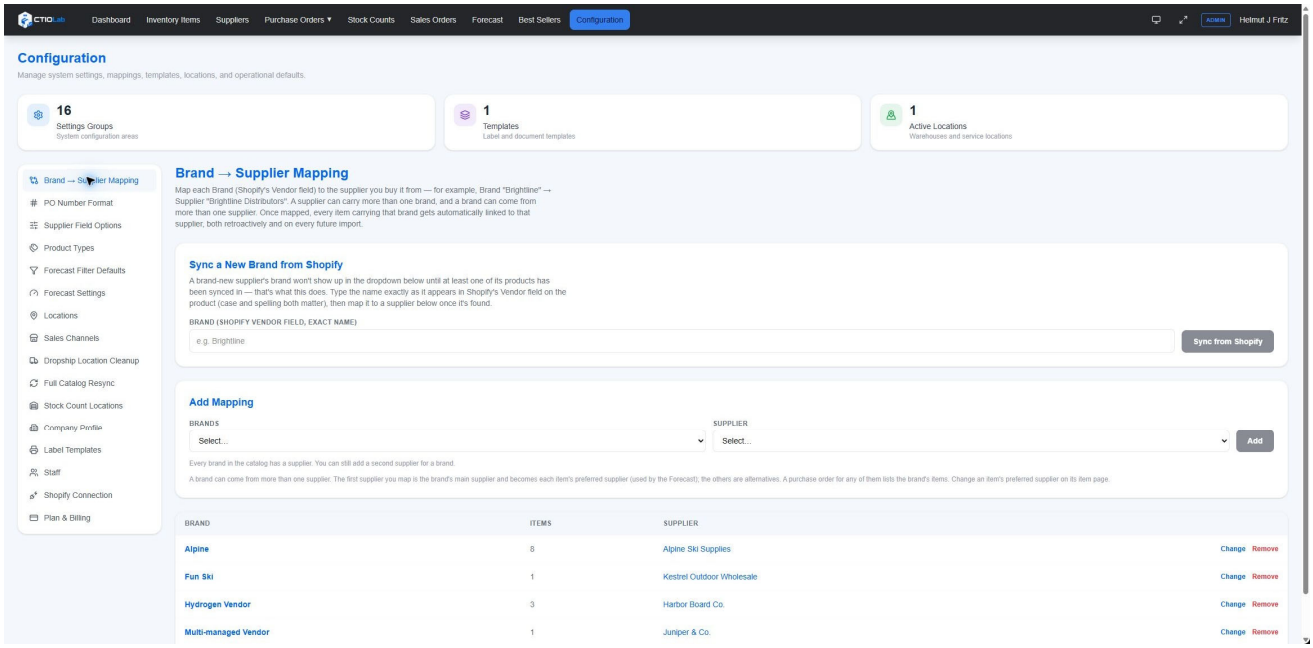


Figure 24 Configuration groups are on the left; mapping and other controls appear in the content area.

9 1 Brand to Supplier Mapping

Map Shopify's Vendor field, shown as Brand, to one or more suppliers. A supplier can carry many brands and a brand can have several suppliers. Mapping links matching items retroactively and on future imports.

Choose brands and supplier, then Add. Change or Remove maintains an existing mapping. For a new vendor not yet listed, enter its exact Shopify Vendor name under Sync a New Brand from Shopify, select Sync from Shopify, then map it after import. Case and spelling matter.

The first mapped supplier becomes main/preferred for Forecast; others are alternatives. Change a particular item's preference on its item page. POs for alternatives still list their sourced items at their own costs. Brand-level mapping reduces repeated item-by-item setup.

9 2 PO Number Format

Set Prefix and Suffix for newly generated numbers, review the example, and Save. Include your own dash or space; separators are not added automatically.

This shapes new numbers and does not rename existing POs. A PO's own page/form can override its number. Keep it distinct from supplier order and invoice references.

9 3 Supplier Field Options

Maintain Payment Terms, Payment Method, Country, and Tax Type choices. Add, remove, or reorder with up/down controls, then Save Changes. No Tax is the new-supplier default.

Consistent country names and terms make reporting easier. Changing a choice is not the same as correcting every existing supplier record.

9 4 Product Types

Add, remove, or reorder types and Save Changes. Import from Shopify brings in Shopify types. These choices populate item fields and catalog filters and connect to label defaults.

An item's Lock Product Type preserves a local exception against imports. Review the lock when the expected type differs from Shopify.

9 5 Forecast Filter Defaults

Maintain Default Templates, Default Include Tags, and Default Exclude Tags, then Save Changes. They pre-fill Forecast but remain editable and clearable in the report.

Defaults help define a regular replenishment range. When products appear missing, check both report choices and shared defaults.

9 6 Forecast Settings

Control safety stock, stock bands, high-value limits, dropship coverage, and classification cutoffs. Save Changes stores rules. Recalculate classes now applies current class cutoffs.

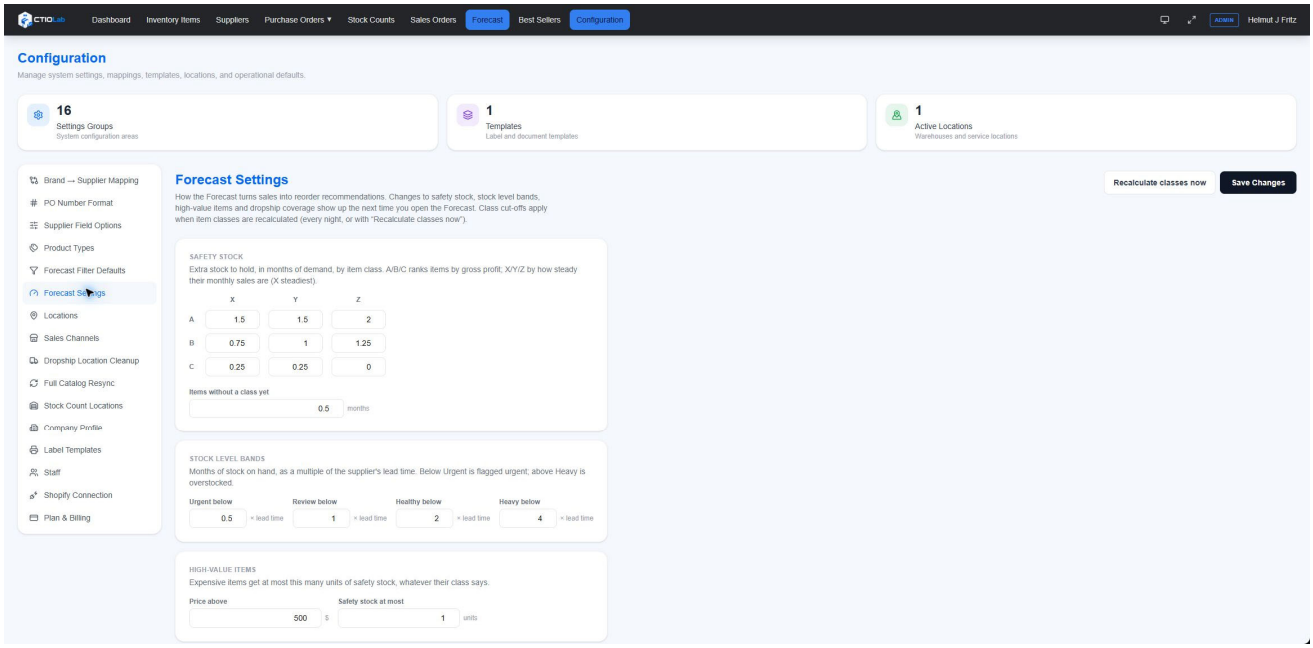


Figure 25 Forecast tuning groups safety stock, bands, high-value limits, dropship coverage, and class cutoffs.

Safety Stock is extra stock expressed in months of demand for each ABC/XYZ combination. An additional setting covers unclassified products. The demonstration's matrix illustrates the units; use your store's saved values.

Class	X months	Y months	Z months
A	1.5	1.5	2
B	0.75	1	1.25
C	0.25	0.25	0

The example unclassified buffer is 0.5 month. Choose stock buffers with supplier lead time and cash constraints in mind.

Stock Level Bands express months of stock as multiples of supplier lead time: Urgent below, Review below, Healthy below, Heavy below. Stock below Urgent is urgent; above Heavy is overstocked. Example multipliers are 0.5, 1, 2, and 4.

High-Value Items caps safety-stock units above a price threshold. The example is a $500 threshold and at most 1 unit. It limits the class-driven buffer for qualifying expensive products.

Dropship Coverage defines how much online demand is supplied directly instead of held in stock according to supplier reliability. Example percentages are DS-A 90%, DS-B 50%, DS-C 15%, Not rated 0%. This planning adjustment does not automatically fulfill an order.

Item Class Cutoffs sets A and B cumulative gross-profit limits; C is the remainder. Example limits are 80% and 95%. XYZ uses standard deviation divided by average monthly sales over the last 12 months. Example X and Y variation cutoffs are 0.5 and 1; Z is above.

Safety stock, bands, price caps, and dropship changes affect the next loaded Forecast. Class cutoffs apply on nightly/manual recalculation. Review the updated report before purchasing.

9 7 Locations

Activate Shopify locations to manage them in CTIOLab. Active locations populate new PO/count pickers and contribute to quantities on Inventory, Low Stock, and Dashboard. Deactivation removes a location from future selection without altering prior receipt/count associations.

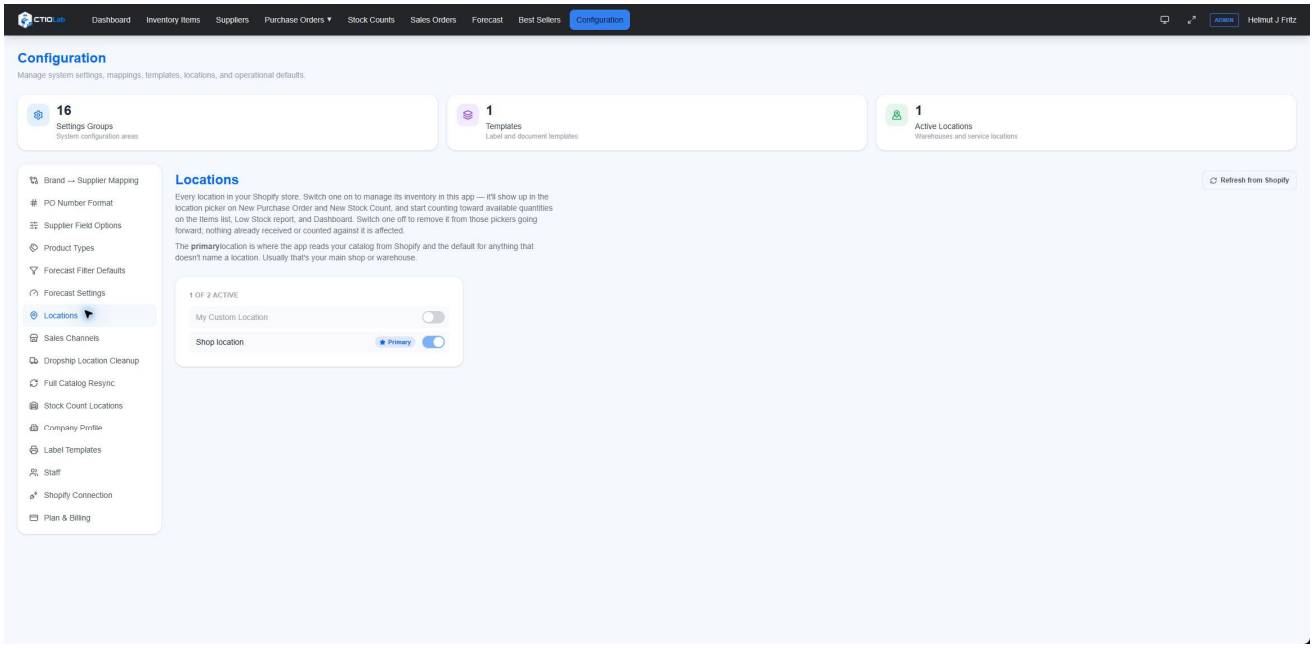


Figure 26 Locations distinguishes app-managed Shopify locations and the Primary designation.

Primary is the catalog-source/default location for operations without a named location. Refresh from Shopify updates the list. Check activation when a location is missing or totals differ. Shopify inventory locations, counting areas, and unmanaged dropship locations have different purposes.

9 8 Sales Channels

Assign Shopify order sources to Store, Online, or Wholesale demand, then Save Changes. Sources include web, POS, draft orders, and order-creating apps. Unassigned sources count as Store. Mapping lets Forecast separate demand channels.

Wholesale Location identifies the wholesale-stock location. The setting describes wholesale-only demand planning when that location is filtered alone.

Merge products listed twice supports separate Shopify listings sharing a SKU across channels. Choose Keep the copy from and optional Other channel. It applies as items sync; Import from Shopify applies it across the catalog. Review shared identifiers and the retained listing before merging.

9 9 Dropship Location Cleanup

Select unmanaged supplier locations under Locations to clean up daily and Save Changes. Only locations the app does not already manage are offered.

A daily job resets quantities below zero to exactly zero only at saved locations. It does not reset positive quantities or affect unlisted locations. Run cleanup now processes the saved scope immediately.

These locations can support ship-from addresses while Shopify routing decrements stock there. Use ordinary managed-location workflows for your own inventory rather than applying supplier cleanup to it.

9 10 Full Catalog Resync

This schedules the daily equivalent of Import from Shopify in small batches. Choose the earliest allowed start hour and Save Changes.

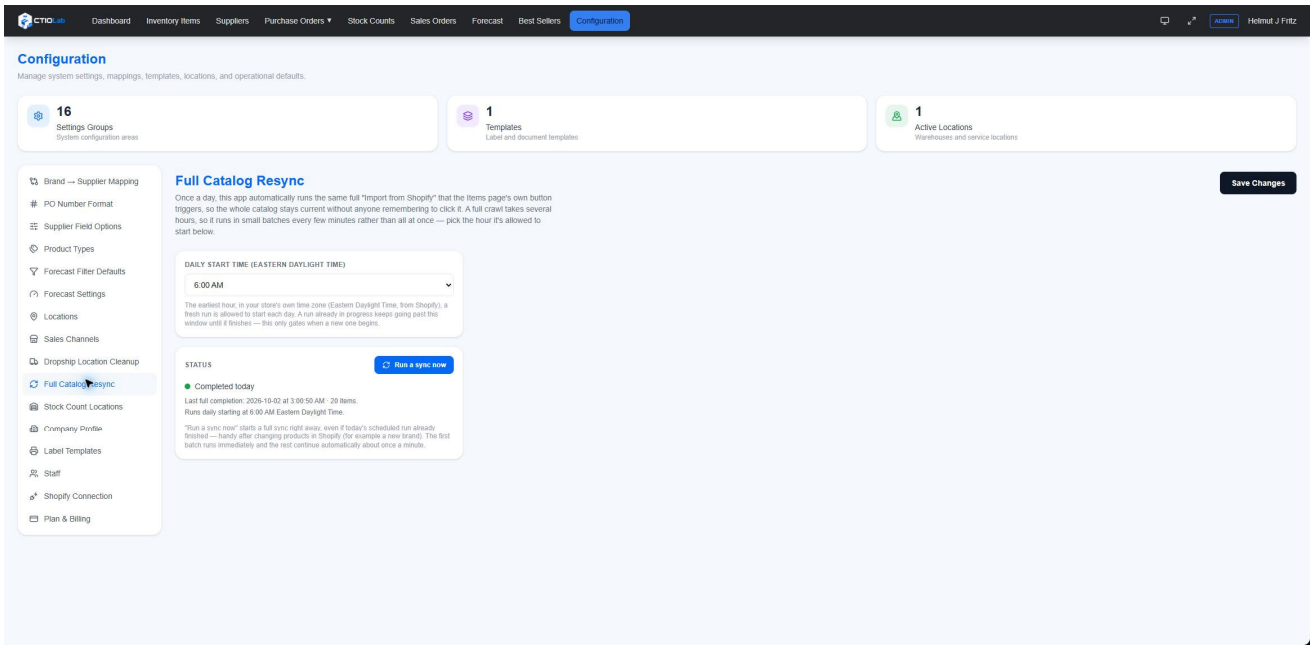


Figure 27 Catalog resync uses Shopify's store time zone and reports last completion and item count.

The schedule uses the Shopify store time zone, which can differ from your computer. It gates the start of a new run; an in-progress run continues until completion. Status shows progress/completion, last completion, and item count.

Run a sync now starts immediately, even after the day's scheduled run. The first batch runs straight away and remaining batches continue automatically. Large catalogs need time. Inventory's Auto resync link opens this status; a configured schedule alone does not prove completion.

9 11 Stock Count Locations

Maintain physical counting areas such as Shop, Warehouse, or Basement. Add, Rename, up/down ordering, and Deactivate organize the sequence. Counts can prompt the next area after completion.

Deactivation hides an area going forward without changing past counts. These areas organize counting within the inventory-location context and are not Shopify locations themselves.

9 12 Company Profile

Maintain company name, address lines, city, state/province, postcode, country/region, phone, and email. These provide the sender information on PO PDFs.

Notes shown at the bottom of every PO sets the shared footer. Upload a PNG or JPEG logo under 800 KB for the top of each PDF; Remove clears the existing logo. Save Changes stores the profile. Review identity and footer text before sending supplier documents.

9 13 Label Templates

Templates define label size, content, barcode, and layout. Product Type Defaults chooses each type's starting template; Save Defaults stores associations. Staff can override the template for an individual print job.

New Template or Edit opens name, width/height in inches, font size, horizontal/vertical orientation, and content controls.

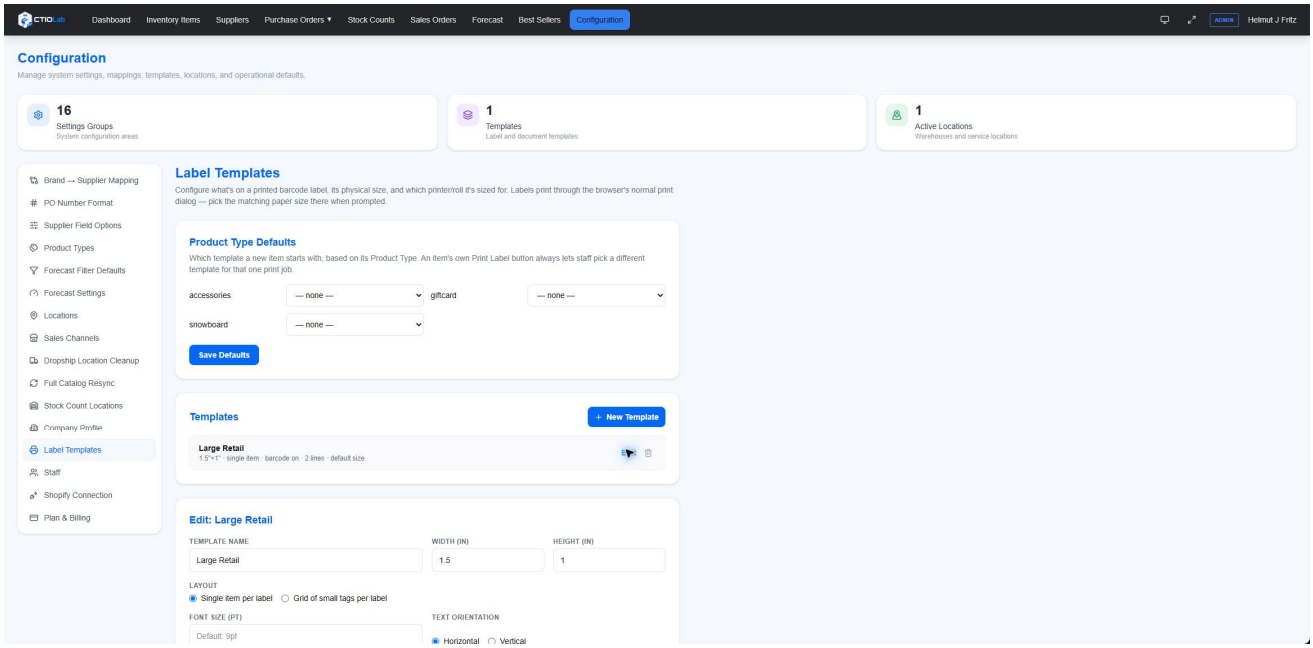


Figure 28 Label editor groups physical dimensions, layout, content lines, and barcode options.

Single item per label prints one item. Grid of small tags per label adds Columns and Rows; bulk printing packs quantities across sheets and can mix SKUs to reduce unused tags.

Content fields are Product Name, Variant, SKU, Price, Vendor, Product Type, and Custom Text. Each line prints on a separate row; multiple fields on one line join with a slash. Add Line, reordering, and removal organize content.

Include barcode adds barcode output. Fall back to SKU encodes the SKU when no real Shopify barcode exists. Check identifier/scanner compatibility. Save Template stores changes; Cancel discards the current editor changes.

Printing uses the browser print dialog. Match paper/roll size to template dimensions and test a small batch before printing many labels.

9 14 Staff

People opening the app through Shopify Admin appear automatically. The list shows identity, role choices, and the store-owner designation. Admin grants Configuration and staff-management access; other users remain Staff.

Grant administrative rights to the people responsible for shared settings. Shopify staff access and CTIOLab roles are separate parts of the access context.

9 15 Shopify Connection

Review store, connection type, connection information, optional scope status, webhooks, and customer privacy requests.

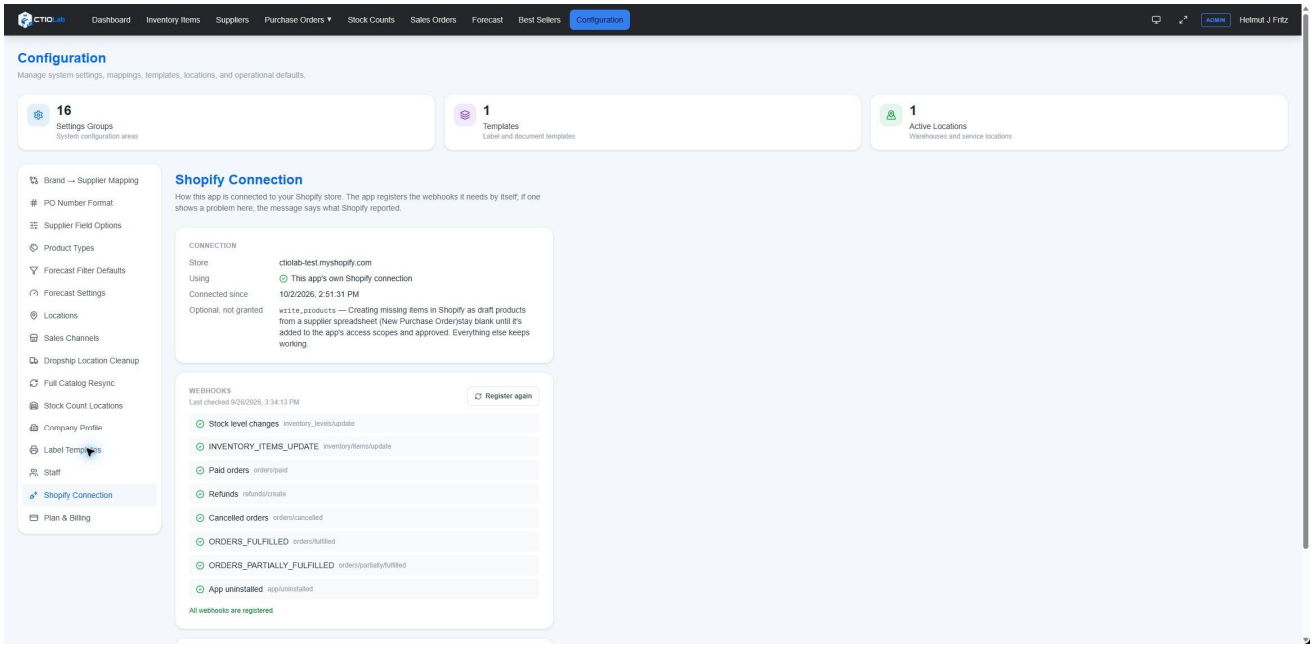


Figure 29 Connection health groups optional permissions, webhook registration, and privacy requests.

The app registers required webhooks and shows Shopify-reported messages. Events cover stock levels, inventory items, paid orders, refunds, cancellations, fulfilled/partially fulfilled orders, and uninstall. The last check and Register again support investigation. Registration confirms setup status; investigate missing operational updates separately.

Optional write_products permits creating missing Shopify draft products from supplier spreadsheets in New Purchase Order. Without it, that feature remains unavailable while other functions continue. Scope changes require appropriate Shopify approval.

Customer Privacy Requests receives Shopify-forwarded data/erasure requests. For a data request, download the app-held information from the request and follow your store's process for providing it to the customer. Handle it through the appropriate privacy staff and procedures.

9 16 Plan and Billing

Plans use active SKU count and are billed on the regular Shopify invoice. The page shows current plan, coverage, trial information, usage, and plan choices.

Tiers displayed are Starter (up to 1,000 SKUs), Growth (up to 10,000), and Pro (unlimited). Review live prices and subscription terms before changing plans. The page states all plans include all features and a 14-day free trial.

Change plan starts plan selection; Check with Shopify refreshes billing information. Review Shopify's confirmation before approving a subscription change.

Common questions

Why do low stock counts differ

Dashboard/class A counts, manual Low Stock, supplier-core alerts, and Forecast use different rules. Compare class, manual/calculated thresholds, minimums, dates, filters, and active locations before expecting equal counts.

Why is an item missing

Clear search, dates, catalog/tag/template filters, and Core Only. Check import state, active location, and exact variant/SKU. Supplier pickers require sourcing links. Forecast defaults can restrict the view; allow calculations to finish.

Why did import change a local choice

Unlocked Product Type, Core Product, and supplier SKU/cost can refresh from import. Save the relevant lock for a deliberate exception, then review future synchronization results.

Why does spend show zero

Check Spend From/To. Only non-cancelled POs placed in that period contribute. Older purchase history remains accessible from supplier details.

Why is a PO missing

Check status and order-date filters, Archived, and Trash. Open counts can include drafts. Use the detail page for status and receipt progress.

Why is a classification or proposal not ready

Wait for report/proposal calculation, then check imported sales, matching identifiers, last class calculation, filters, supplier links, and replenishment settings. No-demand items can have blank classes or supply coverage.

Which location should I use

Use the Shopify inventory location for PO/count setup and receipt. Use count sublocations for physical areas during counting. Dropship cleanup targets its saved unmanaged supplier locations only.

What should I check before changing stock

For receipt, verify actual quantity, item, and Receiving At. For counts, verify Full/Additive type, included scope, all areas, corrections, and final confirmation. Use shipment review when you want a checkpoint rather than immediate Receive Scan.

Why does a label look wrong

Check dimensions, grid/single layout, content, orientation, and barcode/SKU fallback. Match browser paper size to physical stock and test a small batch.