StockAI

User manual

Everything StockAI does, screen by screen, and its API.

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How to read this manual

This is the help center (stockai.es/en/docs), printed. It starts with getting StockAI running and the ideas it uses everywhere; then it walks every screen from start to end, with real captures, the steps of each task and what every option means; it ends with the API step by step and troubleshooting. Read it through, or open it only at the screen in front of you.

The four signals

The whole application turns on a single piece of arithmetic: how many days you last with what you hold, against how long your supplier takes to deliver. Four signals come out of it, and you will see them on almost every screen.

PEDIR_YA	You run out before the next order arrives.
PEDIR_PRONTO	Not urgent yet, but it will be if you wait until next week.
OK	You have enough coverage. Nothing to decide today.
SOBRESTOCK	You hold far more than you will sell: that is money standing still.

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Getting started

From a new account to your first stock signal and your first purchase order.

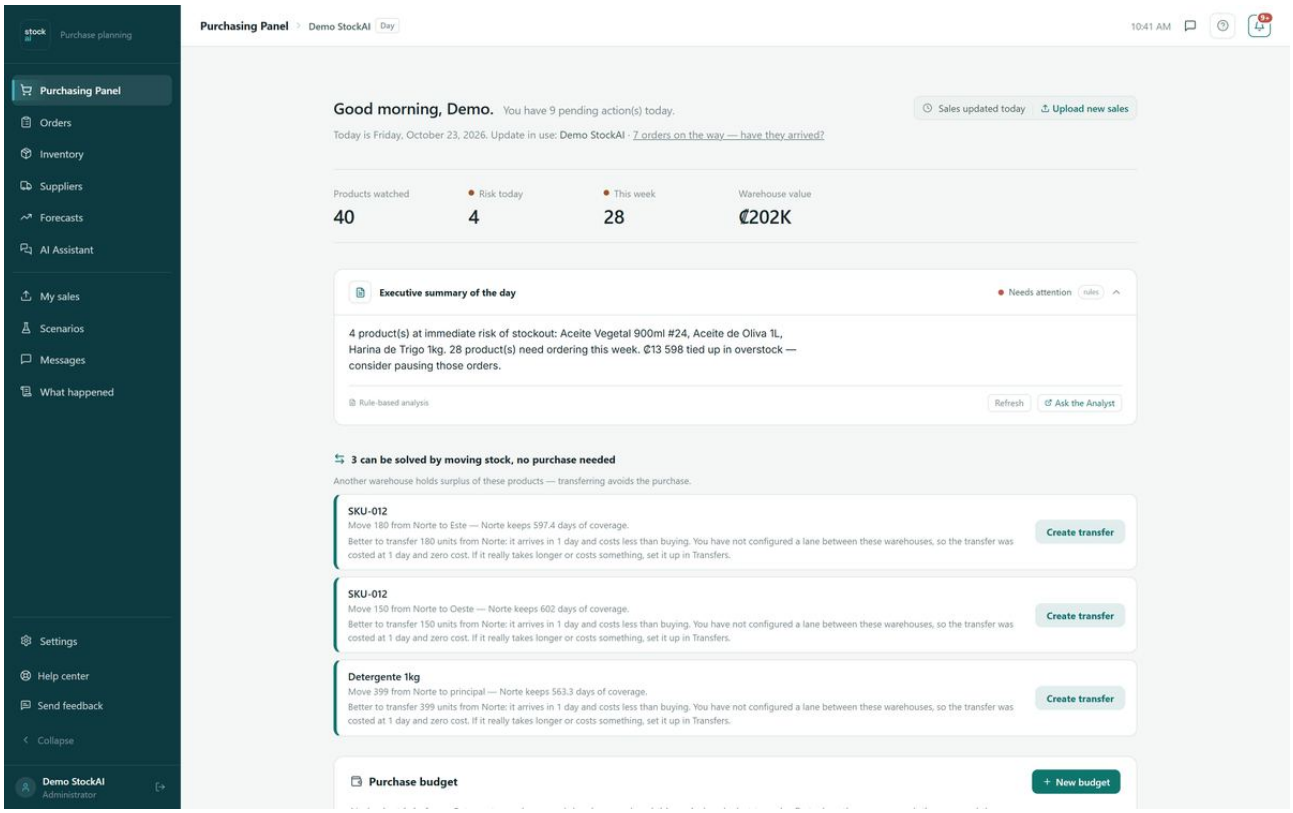
What StockAI is

StockAI learns from your sales history, compares it with what you have on the shelf, and tells you every morning what to order, how much and from which supplier.

StockAI is a purchasing tool for distributors and wholesalers. It guesses nothing about your business: it forecasts each product's demand from your own sales, compares it with the stock, cost and lead time you record, and turns that comparison into a short list of buying decisions.

HOW IT WORKS, IN FOUR STEPS

1. You upload your sales. A CSV or Excel file with date, product and quantity sold, under My sales. See Upload your sales.
2. StockAI trains a forecast per product. Several models compete on your history and, for each product, the one whose mistakes cost you least is kept. See How the models compete.
3. You complete your inventory. Today's stock, unit cost and lead time, under Set up inventory. See Set up your inventory.
4. You read the stock signal and buy. The Purchasing Panel shows what to order today and what this week; you approve, save the order, send it to the supplier and log the arrival. See Your first purchase order.



THE STOCK SIGNAL

Every product gets a signal that compares how long your stock will last with how long your supplier takes to deliver:

Order NOW	Stock covers less than half the time a new order takes to arrive (factory value, configurable).
Order soon	Stock has dropped below your reorder point: order this week.
OK	You have enough stock; nothing to order yet.
Overstock	You hold far more than you will sell over several lead times: money sitting still.
No data	The product's stock or forecast is missing, so there is nothing to compute with.

The exact rule, and how to change the cut-offs, is in The stock signal.

WHAT STOCKAI DOES NOT DO

· It does not invent data. A product with no stock or cost recorded shows as "No data" instead of an assumed zero. With no lead time it uses 15 days and marks it as estimated.

· It does not buy for you. Quantities are suggestions: you approve, change or reject them line by line.

· It does not plug itself into your accounting. Your data comes in as a file (CSV or Excel), as a query to your database, or through the API.

WHO IT IS FOR

For whoever makes purchasing decisions over a catalogue of tens or thousands of products and several suppliers, and does it in a spreadsheet today. It works on a computer and on a phone, where it can be installed as an app.

PLANS AND LIMITS

Every account carries the same screens and the same forecasting. What changes between the plans (Free, Pro, Max and Corporate) is how much fits: products, users, warehouses, saved forecasts, API keys and file size. The API, MCP and WhatsApp alerts start on Pro. See Plans and limits.

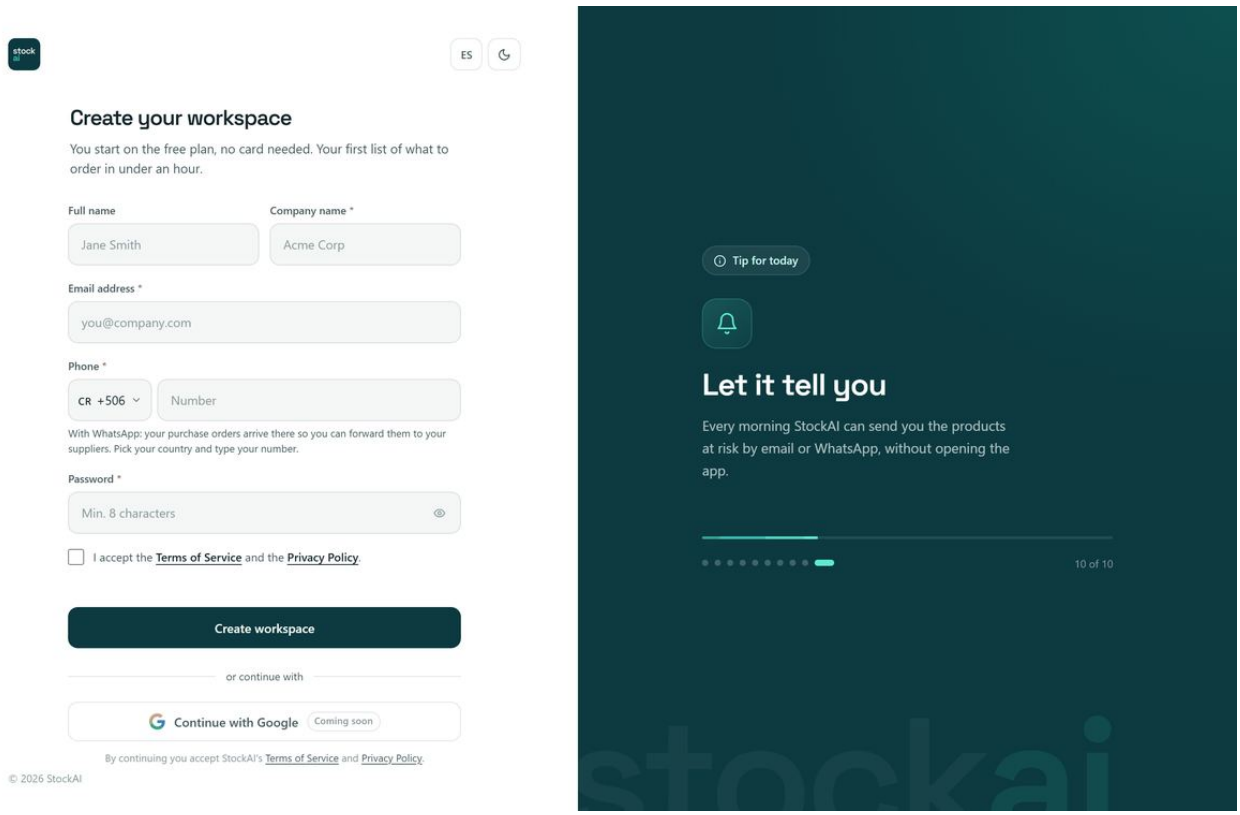
> Want to look without signing up?
>
> From the home page you can open a 24-hour trial account with sample data. See Create your account.

Create your account

How to create your StockAI workspace field by field, what happens with the verification email, what to do if the link does not arrive or has expired, and how to try StockAI without signing up.

At Create an account you open a new workspace: a company in StockAI with its own inventory, sales and users. Whoever creates it becomes that company's admin and starts on the free plan, no card needed (see Plan limits). You do not need an account first: this screen is public. If you only want to look first, you can try it without signing up.

> Were you invited to a company that already uses StockAI?
>
> Then do not create an account here: open the link in the invitation email. This screen always creates a new, empty company. Until you open that link your user stays «Pending» and cannot sign in. If you cannot find the email (check your spam folder too), ask the admin to resend it from Users.



The sign-up form. On the right, the «Tip for today» panel cycles through usage tips; it is for information only.

WHAT IS ON THE SCREEN

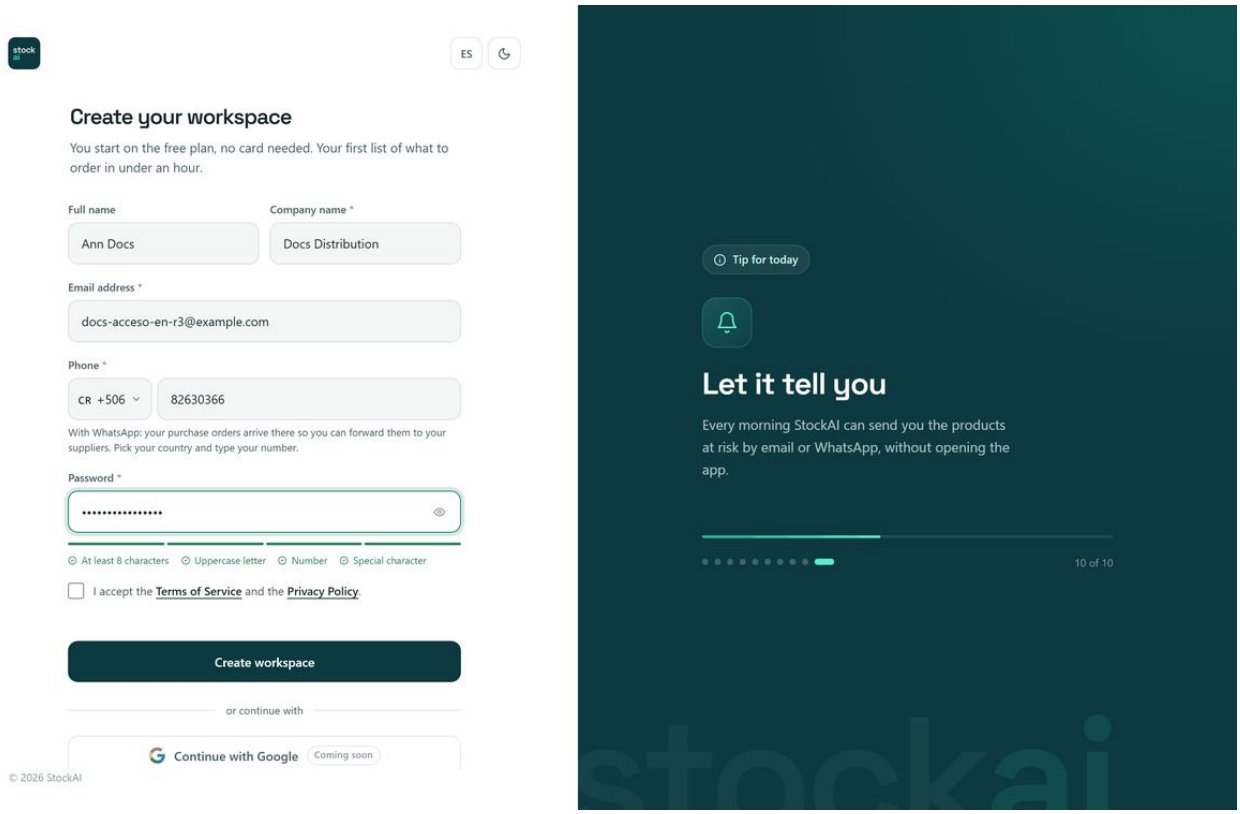
ES / EN (top right)	Switches the screen between Spanish and English.
Moon / sun	Switches between the light and the dark theme.
Full name	Optional. The name your teammates see and the one on the orders you approve.
Company name *	Required. Your workspace name; you can change it later in the settings.

Email address *	Required. Your sign-in user and where the verification link goes. Each email can have only one account on the whole installation.
Phone *	Required. Pick the country in the selector (flag and code, with a «Search country or code» box) and type your number. It must have WhatsApp: your purchase orders arrive there so you can forward them to your suppliers. If you paste a number starting with +, the country is picked for you.
Password *	Required. The eye shows or hides it. Below it a meter shows four guides: «At least 8 characters», «Uppercase letter», «Number» and «Special character».
I accept the Terms of Service and the Privacy Policy	Required box, always unticked when the page opens. Each link opens its document.
Create workspace	Creates the account. While it works it reads «Creating workspace…» and ignores a second click.
or continue with · Continue with Google	Google sign-in always appears, but switched off with a «Coming soon» tag until the installation enables it. Pressing it only explains «Sign-in with Google is not active yet». Continue with Microsoft and Continue with Apple appear only on installations that enable them. Social sign-in is off by default: if it is not active, use your email and password.
Already have an account? Sign in	Takes you to Sign in.

> The actual password rule
>
> The meter guides you towards a strong password, but what the server requires is: at least 8 characters, with at least one letter and one digit (and no more than 72 bytes). A password without an uppercase letter or a symbol is accepted even if the meter is not full.

CREATING THE ACCOUNT STEP BY STEP

1. Open Create an account (from the home page or from «Create an account» on the sign-in screen).
2. Type your name (optional) and the Company name.
3. Type your work Email address.
4. In Phone, pick your country and type the full number that has WhatsApp.
5. Type a Password of at least 8 characters with letters and digits. Use the eye to check it.
6. Tick «I accept the Terms of Service and the Privacy Policy».
7. Press «Create workspace».
8. Open the verification link in your email (or the button shown on screen if the email could not be sent), then sign in.

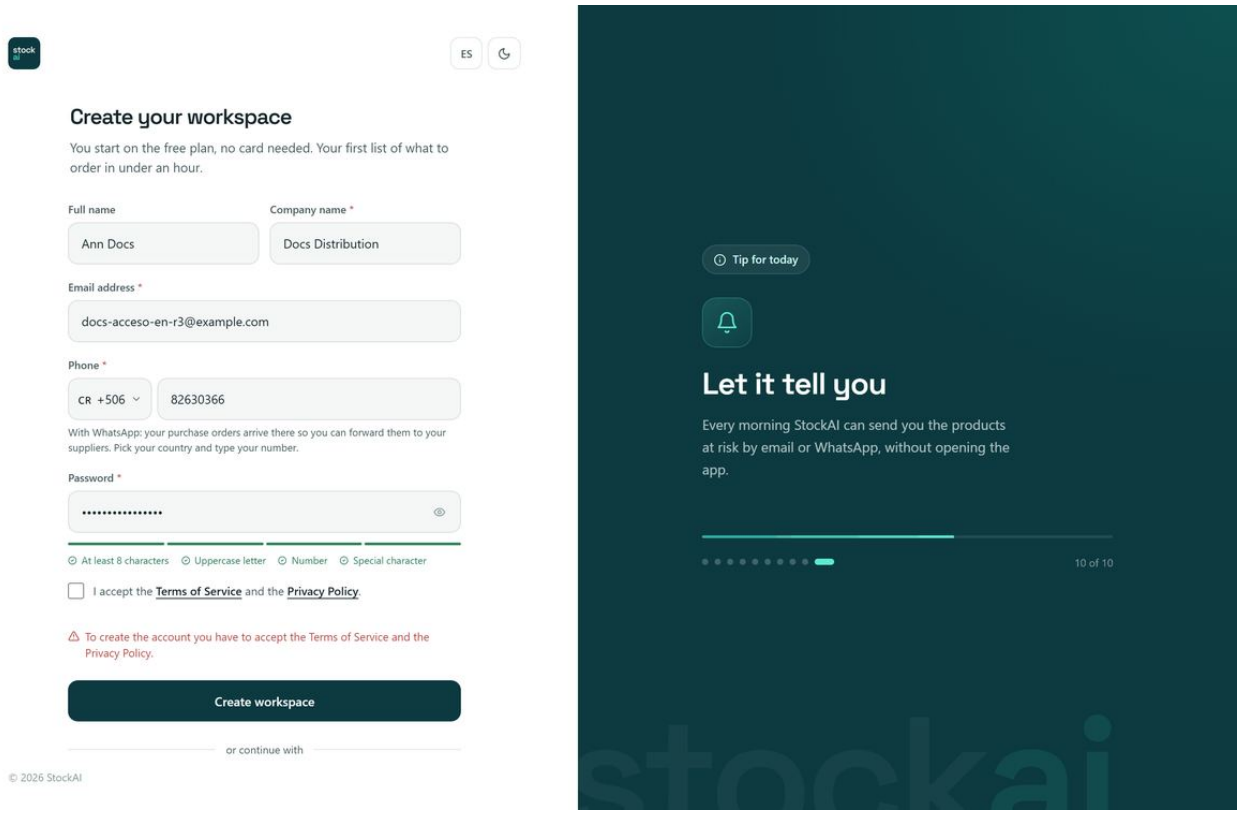


Every field filled in. With the four guides met, the meter turns green.

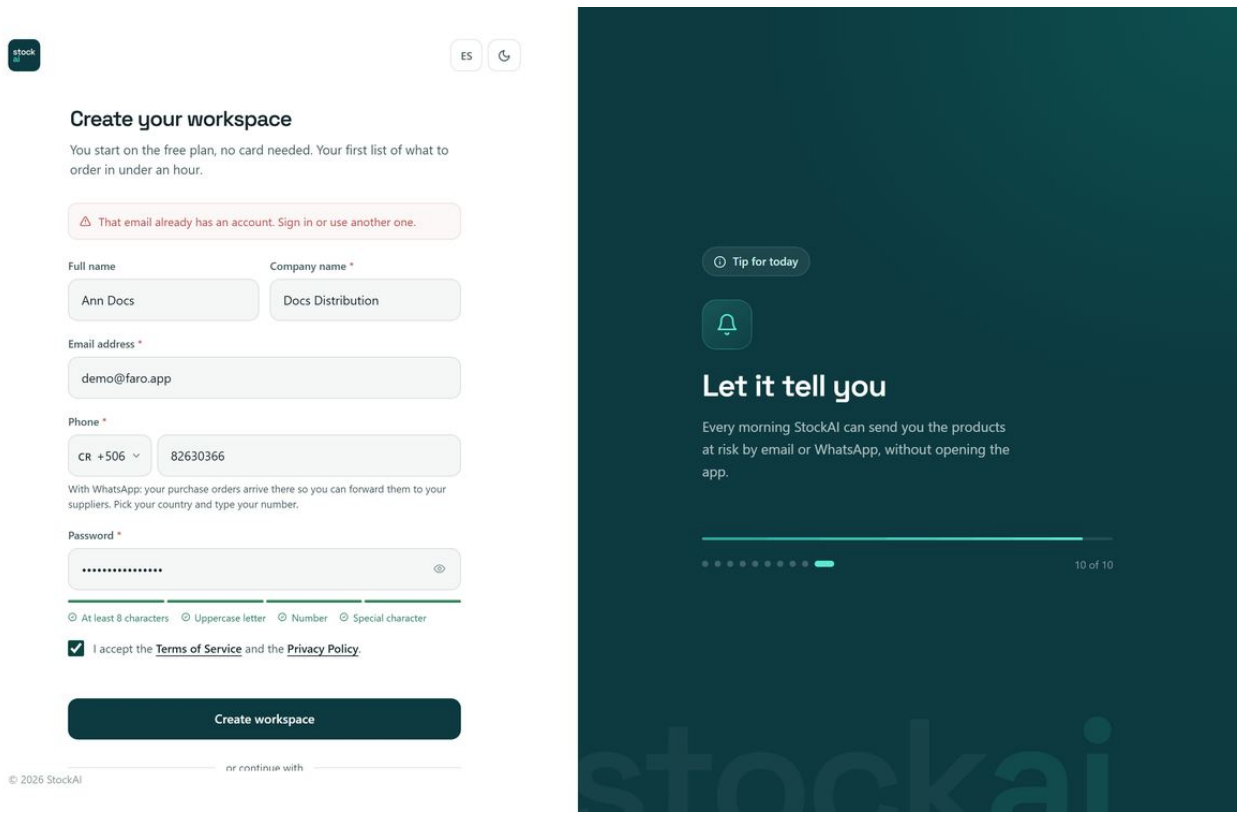
WHAT THE SCREEN REFUSES AND WHY

The first two checks happen before anything is sent; the rest come from the server and show in the red box at the top of the form. In no case is a half-made account left behind.

«Pick your country and enter your full number, e.g. +506 8888 7777.»	The phone is not in full international format (country code and number).
«To create the account you have to accept the Terms of Service and the Privacy Policy.»	You did not tick the box. The warning appears next to it, not at the top, so you see it on a phone too.
«That email already has an account. Sign in or use another one.»	The email is already registered. If it is yours and you forgot the password, go to Recover your password.
«This WhatsApp number is already linked to another account»	Each number can belong to one person only.
«The password must be at least 8 characters long, with at least one letter and one digit.»	The password does not meet the server rule.



Without accepting the terms no account is created: the warning shows under the box.

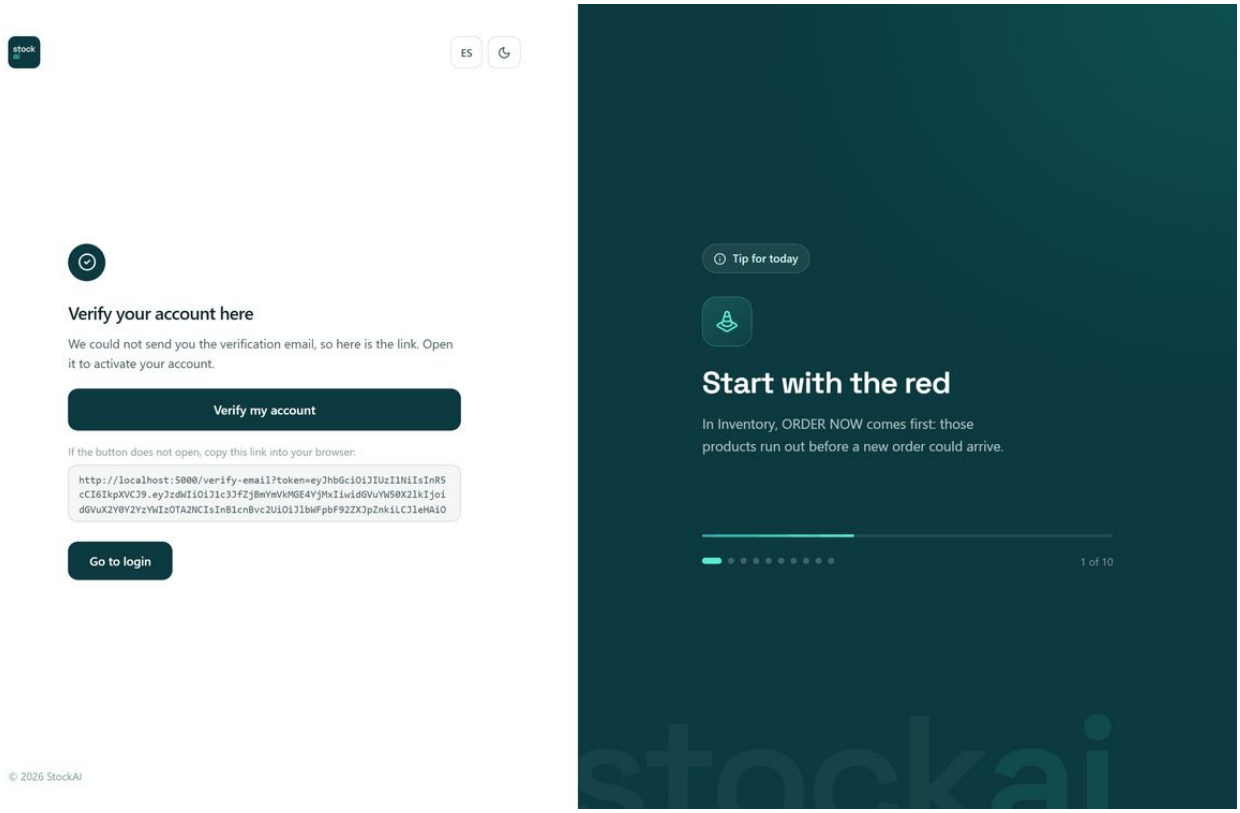


An email that already has an account is refused and nothing is created.

VERIFYING YOUR EMAIL

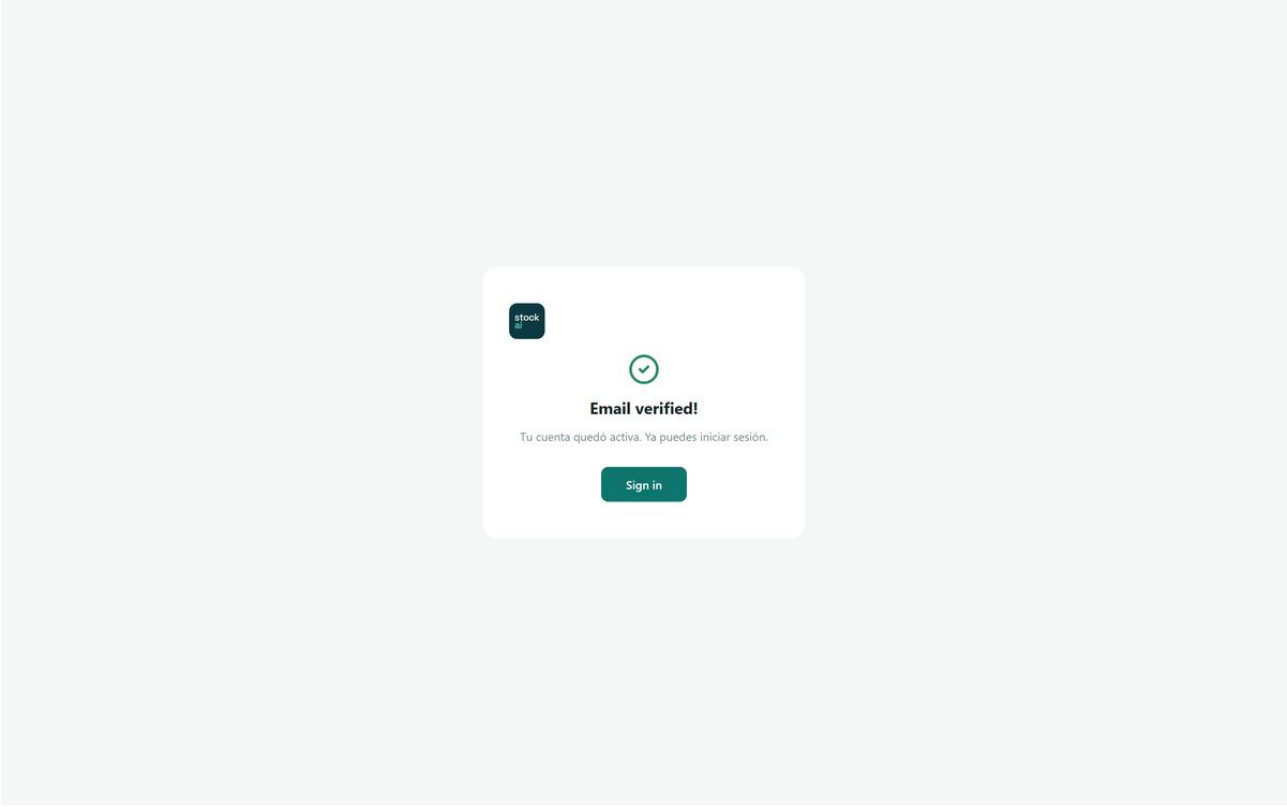
Once the account is created you see one of two screens:

«Check your email»	The verification email went to the address you typed. Open it and click the link. Check your spam folder too.
«Verify your account here»	The email could NOT be sent (for example, the installation has no email service configured). Instead of sending you to look for an email that will never come, the screen gives you the «Verify my account» button and, below it, the full link to copy if the button does not open.



When the email could not be sent, the verification link shows right on screen.

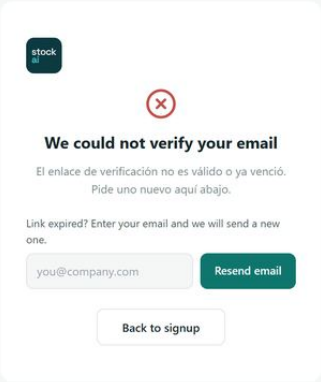
The link opens the verification screen, which reads «Verifying your email…» and a moment later «Email verified!» with a «Sign in» button. The link is valid for 24 hours.



Email verified: the account is active.

If the link expired or does not work

An expired, truncated or token-less link shows «We could not verify your email». The same screen carries the way out: type your email under «Link expired? Enter your email and we will send a new one.» and press «Resend email». The answer is always the same whether or not the account exists («If the account exists and still needs verifying, we just sent the link…»), so nobody can find out which emails are registered. You can ask for up to 3 resends every 15 minutes. «Back to signup» returns to the form.



A link that does not work: ask for a new one from the same screen.

> Unverified, you can sign in but not reach outside
>
> An unverified account can sign in and use StockAI: uploading sales, training, reading the stock signal and saving orders all work the same. What stays closed until you verify are the actions that leave your company: inviting users and resending their invitation, sending orders to suppliers by email or WhatsApp, and notifications. Until you verify, an amber strip at the top of every screen reminds you and carries a «Resend email» button; if you close it with the ×, it comes back the next time you open StockAI. If the sign-in screen tells you verification is missing, the same notice carries that button.

IF YOU FORGOT YOUR PASSWORD

On Sign in press «Forgot password?». A 6-digit code reaches your email; it expires in 15 minutes and stops working after 5 wrong tries, and with it you set a new password. For security, the screen does not tell you whether that email has an account. The step by step is in Recover your password.

TRY WITHOUT SIGNING UP

If you only want to look before creating your company, press «Try it without signing up» on the home page. StockAI instantly creates a trial account with a username and password generated for you, with no email and no card. On entering it loads a sample sales history and analyses it: within a couple of minutes you see what to order and how much.

- It lasts 24 hours. When it ends, the account and everything you did in it are erased.
- The username and password cannot be recovered: copy them and tick «I saved them» before pressing «Enter the demo».
- It has small ceilings (30 products, for example) and sends no email or WhatsApp to anyone.
- From one connection you can create up to 3 a day.

· It does not turn into a regular account by itself: to stay, create your account on this screen or press «Write to us» in the «Trial account» strip.

Full detail in Try without signing up.

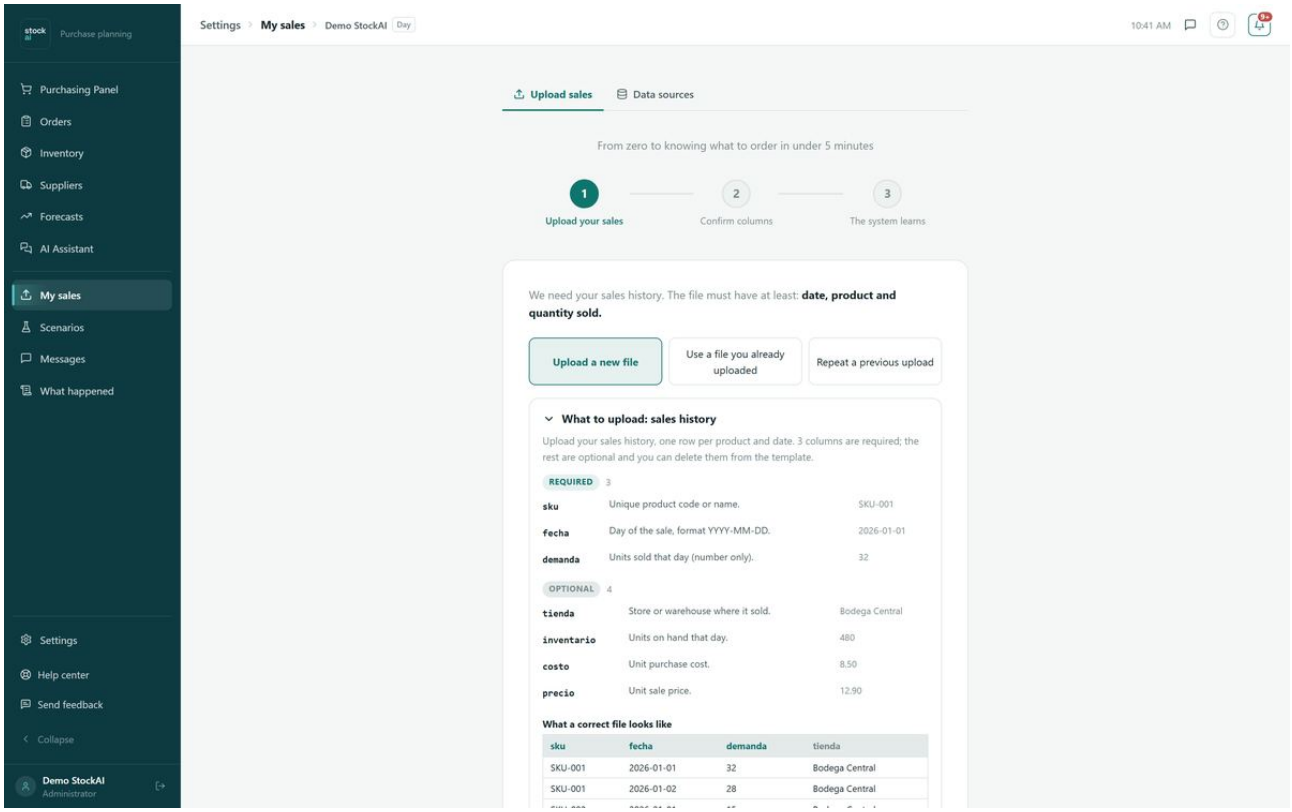
NEXT

Sign in (Sign in) and continue with Upload your sales. To add teammates, go to Users.

Upload your sales

Which file you need, how the columns are confirmed, which questions the data check may ask, and how much history a product needs to get a forecast.

Everything in StockAI comes from your sales history. You upload it under My sales, in three steps shown at the top of the screen: "Upload your sales", "Confirm columns" and "The system learns".



THE FILE

We accept CSV and Excel (`.xlsx`, `.xls`). At minimum it needs three columns: date, product and quantity sold, one row per product and date (or per sale: StockAI will ask how to combine them).

- Quantity sold is in units, not money.
- Dates are best as year-month-day (`2024-01-15`). If your file uses `15/01/2024` or `01/15/2024`, we ask how to read them whenever it cannot be told.
- Optional columns that help: the day's inventory, store or warehouse, cost and price. With an inventory column, a day with no sales can be told apart from a day with nothing on the shelf.
- The maximum size of each file depends on your account's ceilings. See Plans and limits.

If you are not sure how to build it, download the CSV template. It carries the columns StockAI recognises on its own — `sku`, `fecha`, `demanda`, `tienda`, `inventario`, `costo`, `precio` (Spanish headers: date, demand, store, inventory, cost, price) — with sample rows. It is also on the screen, under ⬇ Download sample CSV template.

STEP 1: THE PLAN AND THE FILE

Before dropping the file you fill in four fields:

Give it a name (optional)	So you can recognise this update later in History.

How far ahead do you want to plan?	4 weeks, 8 weeks or 6 months.
Plan detail level	Auto (recommended), Daily, Weekly or Monthly. On Auto, StockAI picks from the shape of your file. See Granularity.
Which country do you sell in?	Whose public holiday calendar the model learns from: Costa Rica (the starting value), Colombia, Mexico, Peru, Chile, Argentina, Ecuador, Guatemala, Panama, Dominican Republic, Spain or the United States. Change it before uploading if you do not sell in Costa Rica.

Drag the file onto the dashed box or click to browse. For a CSV, StockAI checks it on your own computer before uploading and lists the problems with their row number.

If you have uploaded before, two more tabs appear: Use a file you already uploaded (no need to upload it again) and Repeat a previous upload, which reuses the same file and the same columns; you only change the horizon or the detail level.

STEP 2: CONFIRM THE COLUMNS

StockAI proposes which column is which and asks you to confirm: the date column, the quantity-sold column, and whether you have a product / SKU column. Below, a "Preview of your data:" lets you check we read what you thought.

> Always pick the product column
>
> Even if your file holds a single product. If you choose the single-product option, everything is merged into one series, you lose the per-product detail, and the forecast cannot be matched with your inventory.

The data-check questions

If the file holds something that would change the forecast without saying so, the block "There is something you have to decide first" appears, with one question per finding. Each option states what it does and what it costs you if you are wrong, and the continue button stays off until you answer them all. Some real examples:

- "We cannot tell whether your dates are day/month or month/day"
- "We cannot tell whether the comma separates thousands or decimals"
- Several rows for the same product on the same day — add them up or keep the last one.
- "There are negative quantities" — net them as returns, read them as 0, or drop them.
- Quantities that look cumulative rather than sold per period.
- A quantity column that looks like money rather than units.

The option marked "recommended" is only a suggestion: only you know how your system exports. There is also a "You can adjust this if you want" block, which does not stop you from continuing.

If the file has a problem with no possible fix (for example, no column can be read as a date), there is no way to continue anyway: fix the column mapping or upload a different file. See File rejected.

STEP 3: THE SYSTEM LEARNS

Pressing This looks good, continue → starts training. A bar moves through stages (checking your data quality, learning from your history, measuring how accurate it turned out) and it can take several minutes depending on the file size. Do not close the tab. As soon as the daily view is ready

we take you to the stock signal; the rest keeps computing in the background.

HOW MUCH HISTORY YOU NEED

A product needs at least 20 periods of history to enter the forecast. Those that fall short do not show up with a bad forecast: they are simply left out of the run and get no signal. With about 6 months of history the purchase suggestion becomes noticeably more reliable.

NO FILE AT HAND YET?

Press ▶ Try with sample data on My sales (or Try it with demo data on the empty Purchasing Panel). We load made-up sales for 5 products, with stock and suppliers, and take you straight to the stock signal. It does not touch your data: when you have your real file, upload it right here.

Next step: Set up your inventory.

Your first purchase order

From the stock signal to goods on the shelf: approve lines, save the order, send it to the supplier and log the arrival.

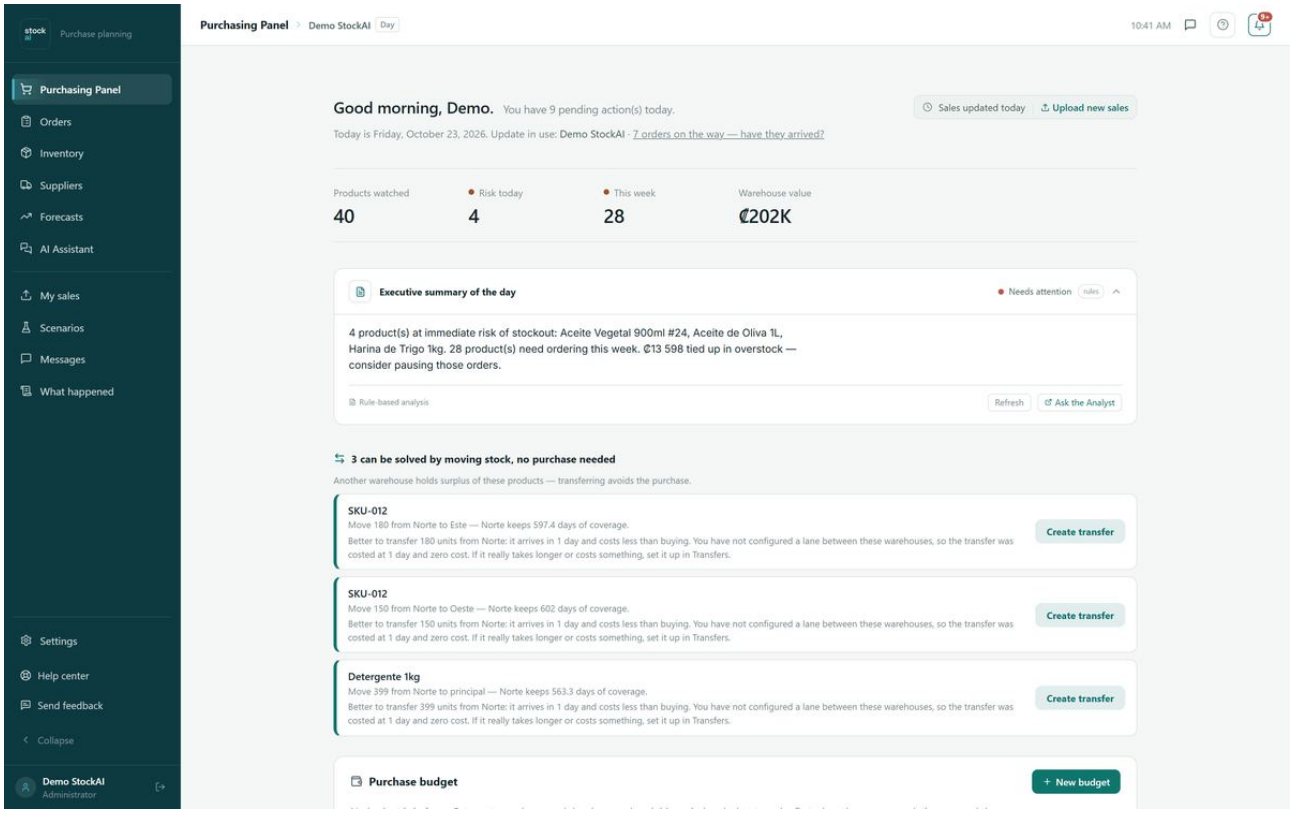
A purchase order in StockAI goes through four moments. The last two are the ones people forget, and they are the ones that make StockAI learn.

1. APPROVE ON THE PURCHASING PANEL

Open the Purchasing Panel. "Urgent — act today" lists the products on Order NOW and "This week" those on Order soon. Each card carries the suggested quantity and the supplier.

- Why? opens the breakdown: cover, demand, lead time, service level, stock and reorder point. Values tagged "estimated" are StockAI's assumptions, not your data.
- Click the quantity to change it, or change the supplier in the list: the line is marked as modified.
- Press Approve on what you will order and Reject on what you will not.

When you approve the first line, the order bar appears at the bottom with the approved products and the total. With two or more warehouses, pick the destination under Deliver to. On a phone each card's button is Add to the order, the order is checked with Review the order and saved with Generate.



2. SAVE THE ORDER

Press Download purchase order. While it saves, the button reads "Saving the order…" and does not accept a second tap. When it is done you see "Order … saved" with a View orders link: the order is recorded under Orders, its products already count as on their way, and the file downloads in case you want to send it yourself.

> One cart, one order
>
> If the connection drops and you press again with the same cart, StockAI does not create a second order: it returns the one already saved and tells you "This order was already saved; no second one was created.".

With the Read-only role you see the recommendations but cannot approve them: "Your role cannot generate orders" appears instead.

3. SEND IT TO THE SUPPLIER

Right after saving, "Purchase order generated" appears with a Send to suppliers now button: StockAI sends the order by email or WhatsApp to every supplier with those details on their card. Those without them are skipped and named; you can also send it later from Orders, or forward it yourself with the copy-message button.

Sending from StockAI requires a verified email.

4. LOG THE ARRIVAL

When the goods arrive, open Orders and press Log arrival on the order:

- Everything arrived if the whole order came in.
- Save quantities if part of it came: type what arrived of each product, and the order stays "Partial" until you log the rest.

Logging the arrival raises your stock and teaches StockAI how long each supplier really takes: from a supplier's third complete reception, that real time replaces the one you configured. See Learned lead time.

> Without this step the order never ends
>
> An order with no arrival logged stays "On the way" forever: it keeps reducing what the Panel suggests you order and teaches nothing about the supplier.

Paying it, cancelling it or undoing a reception also happens under Orders. Full detail in Orders.

Install StockAI on your phone

StockAI installs as an app straight from the browser, with no app store, and opens on the Purchasing Panel.

StockAI works in your phone's browser, and it can also be installed as an app: an icon lands on your home screen, it opens in its own window with no browser bar, and it starts on the Purchasing Panel. No app store involved.

ON ANDROID, CHROME OR EDGE

1. Sign in to StockAI from the browser.
2. Press Install app: on a computer it is in the sidebar; on a phone, under the More tab.
3. Confirm in the browser's prompt.

The button only appears when the browser can install the app. If you already installed it, or your browser does not allow it, you will not see it.

ON IPHONE

Safari offers no install button, so on an iPhone Install app shows you the steps ("Install it on your iPhone"):

1. Tap Share.
2. Choose "Add to Home Screen".

WHAT IT LOOKS LIKE ON A PHONE

On a phone StockAI uses a tab bar at the bottom, like a native app:

Panel	The Purchasing Panel: what to order today, with the order building up at the bottom.
Orders	What is still to receive, and what is already logged.
Inventory	Your products as cards, with their signal.
Assistant	The AI assistant.
More	"All screens": the rest of the menu, the language and theme preferences, Install app, your session and the legal documents.

The installed app also carries shortcuts to the Purchasing Panel, Orders and Inventory (long-press the icon on Android).

OFFLINE

StockAI needs the internet to show your inventory: your figures are not stored on the phone, so you never decide on stale data. If you open the app with no connection you will see a "No connection" page with a Retry button.

Concepts

The stock signal, the reorder point, safety stock and how the models compete.

The stock signal

Each product gets one of five signals by comparing how much selling time your stock covers with how long your supplier takes to deliver. Here is the exact rule and what you can adjust.

The stock signal answers one question per product: will the next order arrive before you run out? It compares two numbers:

- Cover: how much selling time the stock you hold today lasts, at the rate StockAI forecasts (including the effect of any event or season you recorded).
- Lead time: how long your supplier takes from your order to the goods being in your warehouse. See Learned lead time.

THE FIVE SIGNALS

Order NOW	Cover is less than half the lead time (factory value 0.5). You are already late: even ordering today, you will probably run out before it arrives.
Order soon	Cover does not reach your reorder point: what you sell while the order travels plus your safety buffer. Time to order.
OK	Cover is above the reorder point and below the overstock threshold. Nothing to do.
Overstock	Cover reaches 3 times the lead time (factory value) or twice your reorder point, whichever is larger. A product with stock and no forecast demand is overstock too.
No data	The product has no recorded stock or no forecast. Not an error: an unconfigured product. See No data.

In the database and the API the signals are stored as `PEDIR_YA`, `PEDIR_PRONTO`, `OK`, `SOBRESTOCK` and `SIN_DATOS`.

SPECIAL CASES

- Empty shelf, no demand: a product with no stock and no forecast sales is OK, not overstock: nothing to order and nothing sitting idle.
- Stock, no demand: a product holding stock with no forecast sales is Overstock. No sale justifies that inventory.
- Same cover, different signal: 10 days of stock is comfortable with a supplier who delivers in 5 and critical with one who takes 30. The signal always compares against each product's own lead time.

THE SIGNAL AND THE SUGGESTED QUANTITY

Only Order NOW and Order soon carry a quantity. On OK, Overstock and No data the suggested quantity is zero. Because "Order soon" lights up exactly at the reorder point, a line that tells you to buy never comes with zero units.

ADJUSTING THE THRESHOLDS

In Set up my inventory, the "Stock signal rules" panel lets you change the two lead-time multiples:

Threshold	Factory value	Allowed
"Order NOW when stock covers less than" … times the supplier's lead time	0.5	0.1 to 0.95
"Overstock when stock covers" … times the supplier's lead time, or more	3	1.5 to 12

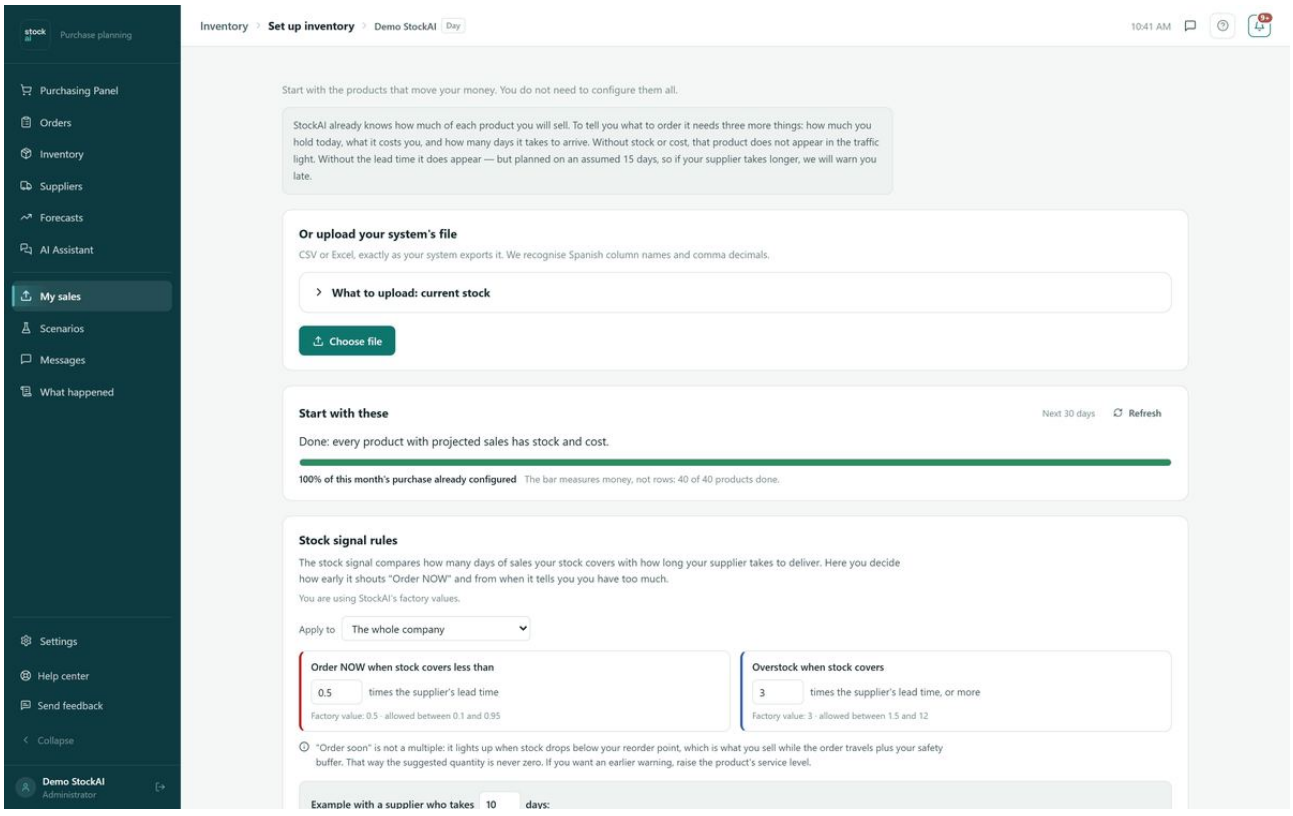
· Under "Apply to" you pick "The whole company" or one supplier. A supplier rule is an exception that overrides the company rule for its products. StockAI also honours category rules: the most specific wins (supplier, then category, then company, then factory values).

· Both values are always saved together, and "Order NOW" must stay below "Overstock".

· Before you save, the screen tells you how many of your products would change signal and shows examples.

· "Back to factory values" undoes your changes (it also tells you how many products would change).

· Only an analyst or an admin can change these rules. Once saved, the stock signal, the 8:00 alerts and the purchase suggestions use the new values.



> "Order soon" is not configurable
>
> Its boundary is your reorder point, not a multiple. If you want an earlier warning, raise the product's service level: that grows the buffer and, with it, the reorder point. The "twice the reorder point" rule is not configurable either; it guarantees the OK band is never empty for a very volatile product.

Reorder point

The stock level at which you must order so the goods arrive before you hit zero: what you sell while you wait for the order, plus your safety buffer.

The reorder point is the number that separates "not yet" from "order now". When your stock drops below it, the product turns Order soon in the stock signal.

HOW IT IS COMPUTED

```
reorder point = demand per period × (lead time + order frequency)
              + safety stock
```

Demand per period	What the forecast expects you to sell per day, week or month, depending on your account's granularity.
Lead time	How long the supplier takes to deliver. See Learned lead time.
Order frequency	The "Order frequency (days)" field on the supplier card: how often you order from them. If you order weekly, put 7. Empty counts as zero.
Safety stock	The buffer against variation in demand and in lead time. See Safety stock.

WHY ORDER FREQUENCY IS IN THERE

If you order from a supplier only once a week, today's order must last not just until it arrives but until the next one arrives. Without that stretch the quantity would fall short by exactly one week of sales. Leave the frequency empty and StockAI assumes you order with no fixed cadence, so the calculation uses the lead time alone.

FROM REORDER POINT TO ORDER QUANTITY

```
quantity = reorder point − current stock − what is already on its way
(never below 0; when there is something to order, never below the minimum order)
```

- What is already on its way is subtracted, so you never order the same units twice.
- The minimum order quantity (MOQ) is a floor, not a multiple: if you need 520 and the minimum is 500, 520 is suggested, not 1,000. The factory value is 1.
- The quantity is rounded up to whole units.

AN EXAMPLE WITH ROUND NUMBERS

> Illustrative example
>
> The numbers are made up so the arithmetic reads easily; they come from no customer.

A product sells 10 units a day, the supplier takes 15 days, you order every 7 days and the safety stock is 40 units.

1. Sales during the wait: 10 × (15 + 7) = 220 units.
2. Reorder point: 220 + 40 = 260 units, that is 26 days of sales.
3. With 300 units on hand, cover is 30 days: above 26, the product is OK.

4. With 200 units (20 days) it falls below 26: Order soon. The suggested quantity is 260 − 200 = 60 units, minus anything already on its way.
5. With 70 units (7 days), cover is less than half of the 15-day lead time: Order NOW.
6. Overstock starts at the larger of 3 × 15 = 45 days or 2 × 26 = 52 days: from 520 units.

Safety stock and service level

The buffer that protects you against selling more than expected or a late supplier. How big it is depends on the service level you choose: 95% by default.

The forecast says how much you expect to sell, but real sales never land exactly on it and suppliers do not always take the same time. Safety stock is what you order on top to cover both surprises.

TWO RISKS THAT ADD UP

- Demand varies during the lead time.
- The lead time varies, even with normal demand.

They combine the way two independent variations do: their squares add, not the values themselves.

```
safety stock = z × √( T × σd²  +  d² × σT² )


z   service-level factor
T   lead time + order frequency, in periods
σd  variation of demand per period
d   average demand per period
σT  variation of the lead time
```

THE SERVICE LEVEL

It is the probability with which you want to cover demand while you wait for the order. More service level means more buffer, and the increase is not linear:

Service level	z factor
90%	1.282
95% (factory)	1.645
97%	1.881
99%	2.326

If you did not set one, StockAI uses 95% and marks it as estimated in "Why?". You change it in the product editor in Inventory, "Service level" field. To see the effect before touching anything, use a "Safety stock" rule in the scenario simulator.

WHERE THE LEAD-TIME VARIATION COMES FROM

1. From that supplier's real receptions, once at least 3 are recorded.
2. Otherwise from the "Variability (days)" field on the supplier card: if it says 15 days but sometimes arrives in 18, put 3.
3. If the product has no supplier and no variability, that term is zero and the buffer covers demand variation only.

WHEN THE BUFFER IS MEASURED INSTEAD OF ASSUMED

When the engine measured the forecast's real errors over the lead time, that measured buffer replaces the demand part of the formula (the lead-time part is still added). The screen says so: "This cushion comes from … own errors across the lead time, not from the textbook formula". It is the same range you see on the Forecasts chart.

> Intermittent products
>
> For products with many days without sales we cannot guarantee the service level you choose: measured, the buffer holds about half the time. The Purchasing Panel warns about it next to the percentage on those products. Check the quantity before approving.

Learned lead time

StockAI learns how long each supplier really takes from the arrivals you record, and from the third reception it uses that number instead of the one you configured.

A supplier who says 7 days but always delivers in 12 cannot keep producing recommendations that assume 7. That is why evidence outranks what was declared.

WHICH LEAD TIME IS USED

For each product StockAI takes the first one that exists from this list:

1. Learned from the supplier's receptions (3 or more).
2. The one you typed on the product card.
3. The "Lead time (days)" on the supplier card.
4. If there is none, 15 days, marked as "estimated".

In "Why?" on the Purchasing Panel and on the Inventory row you can see where each product's number came from.

HOW IT LEARNS

· Every purchase order that arrives complete ("Received" status) leaves one observation: the days between the order and the arrival of its last units. An order that never completes teaches nothing.

· With 3 observations from a supplier, their average rounded to whole days replaces the configured time on all their products. With fewer, one odd delivery (a holiday, a stranded truck) would rewrite everything.

· If every recorded delivery arrived the same day it was ordered, the average is zero and says nothing: StockAI declares it unusable and keeps the configured time.

· If you undo a reception, the observations that reception created are deleted too.

In Suppliers, the "Learning" column shows where each one stands: "n of 3 deliveries recorded..." or "Learned from n deliveries: X days on average...".

ADJUSTING IS NOT ACCUSING

StockAI is stricter about flagging a supplier than about adjusting their time: 3 receptions are enough to learn, but the scorecard's "Trend" column needs at least 6 (2 recent and 4 as a baseline) before it says someone is running later than usual. With fewer it shows "Not yet".

> Recording arrivals in Orders is not paperwork: it is what raises your stock and what teaches StockAI your suppliers' real lead times.

How the models compete

For each product several forecasting models are trained on your own history, tested on sales they did not see, and the one whose mistakes cost you least wins.

No single model fits everything: a stable product, a seasonal one and one that sells now and then need different tools. StockAI does not choose by intuition; it makes the candidates compete and keeps whichever would have done best for your wallet.

THE CANDIDATES

· StockAI has nine models available: statistical ones, machine-learning ones and a global one that learns from your whole catalogue at once.

· In a normal update from My sales, five of them compete, including the global one — the one that gives a new or short-history product a usable forecast.

· Each product only gets the models that suit its series type (stable, seasonal, intermittent, volatile or short). That routing can only shrink the list, never add a model that was not selected.

On screen the models are called "Model 1", "Model 2"…: the algorithm's name changes no purchasing decision.

HOW THEY ARE TESTED

Each model is evaluated walking forward: it is trained on history up to a cut-off and measured against the weeks that follow, which it did not see. That is repeated over several successive cut-offs, so a good result does not hinge on one lucky date.

A product needs at least 20 periods of history to enter this competition. Those that fall short are left out of the forecast.

THE CHEAPEST WINS, NOT THE LEAST WRONG

Running out costs more than holding extra: you lose the sale and sometimes the customer. So errors are weighted: a shortage counts three times as much as a surplus. The winner is the model with the lowest cost measured that way, which may not be the one with the lowest percentage error. You see it in the "Metrics" tab of Forecasts, sorted by "Cost".

REFERENCES AND THE COMBINED MODEL

· References: "last value", "season" and "average". They are the bar to beat — what ordering the same as last time would do — and never win.

· Combined model: a blend of the models that competed. It is shown for comparison, but no purchase is computed from it.

THE FINAL FORECAST USES ALL YOUR HISTORY

The model being graded stops at the cut-off, because it is scored on what comes after. The model that forecasts, once chosen, is retrained on all your history, including the most recent weeks.

Granularity: day, week or month

StockAI computes your purchases by day, by week or by month. It picks the finest period your history supports on its own, and an admin can change it.

Granularity is the unit of time everything is reasoned in: demand, cover, the lead time expressed in periods and the quantity to order.

HOW IT IS CHOSEN

When you upload sales you can leave "Plan detail level" on "Auto (recommended)". StockAI computes at the finest period your history supports: daily if you report daily sales, weekly if your file is weekly.

It is deliberately not chosen by which one gives the lowest error: aggregating always lowers error, so that rule would nearly always pick the month and leave you a plan too coarse to reorder against.

CHANGING IT

In My account, the "How often your purchases are calculated" card explains why the current period was picked and lets you switch between Day, Week and Month, only among those your history supports. Only an administrator can change it, because it applies to the whole account.

The card states the reason in one sentence, for example "Your purchases are calculated weekly, because that is how you report your sales". If you had chosen a period and your most recent file no longer supports it, StockAI moves to one that does and tells you: "You had chosen…, but your most recent file no longer supports it...".

WHAT CHANGES

- Cover and lead time are expressed in periods: a 15-day lead time is about 2.1 weeks.
- It changes the suggested quantities and what reaches you by email and WhatsApp each morning, not only what you see.
- A product with little history can vanish from the daily calculation and still appear in the weekly one, because it needs at least 20 periods.

> This is not a view switch: it changes the plan for the whole company. Tell your team before you do it.

What counts as "on its way"

What you already ordered and has not arrived is subtracted from the suggested quantity, so StockAI never asks you to order the same units twice. Here is what goes into that count and what does not.

The order quantity is computed against your inventory position, not just the shelf: what you hold plus what is coming. Without it, StockAI would ask for the same units every day until they physically arrived.

WHAT COUNTS

· Every ordered line of a purchase order that is On the way, Partial or Did not arrive, as long as the order is not cancelled.

· Each line counts what was ordered minus what was already received, never below zero. A partial reception subtracts exactly the units that arrived.

· It does not matter whether the order was sent from StockAI: an order you downloaded as CSV and sent yourself counts too, because it was recorded in Orders.

· Transfers between warehouses that are in transit count for the destination warehouse. The origin already took them off when sending.

WHAT STOPS COUNTING

· A cancelled order stops counting at that moment. Reopen it and it counts again.

· A Received order is no longer on its way: its units are already in your stock.

· Undo send does not remove it: an order you un-marked as sent still counts as on its way, because the goods may come anyway.

"DID NOT ARRIVE" CLOSES NOTHING

Marking an order "Did not arrive" records that the delivery has not happened yet, not that the order was cancelled. It still counts as on its way and its arrival can still be recorded. If it really is not coming, cancel it in Orders.

> If StockAI suggests little for a product you need, check Orders for an old open order you never received or cancelled: it is subtracting units that may never come.

Purchasing

Every purchasing screen with all its options: dashboard, orders, approvals, suppliers, terms and messages.

Purchasing panel, step by step

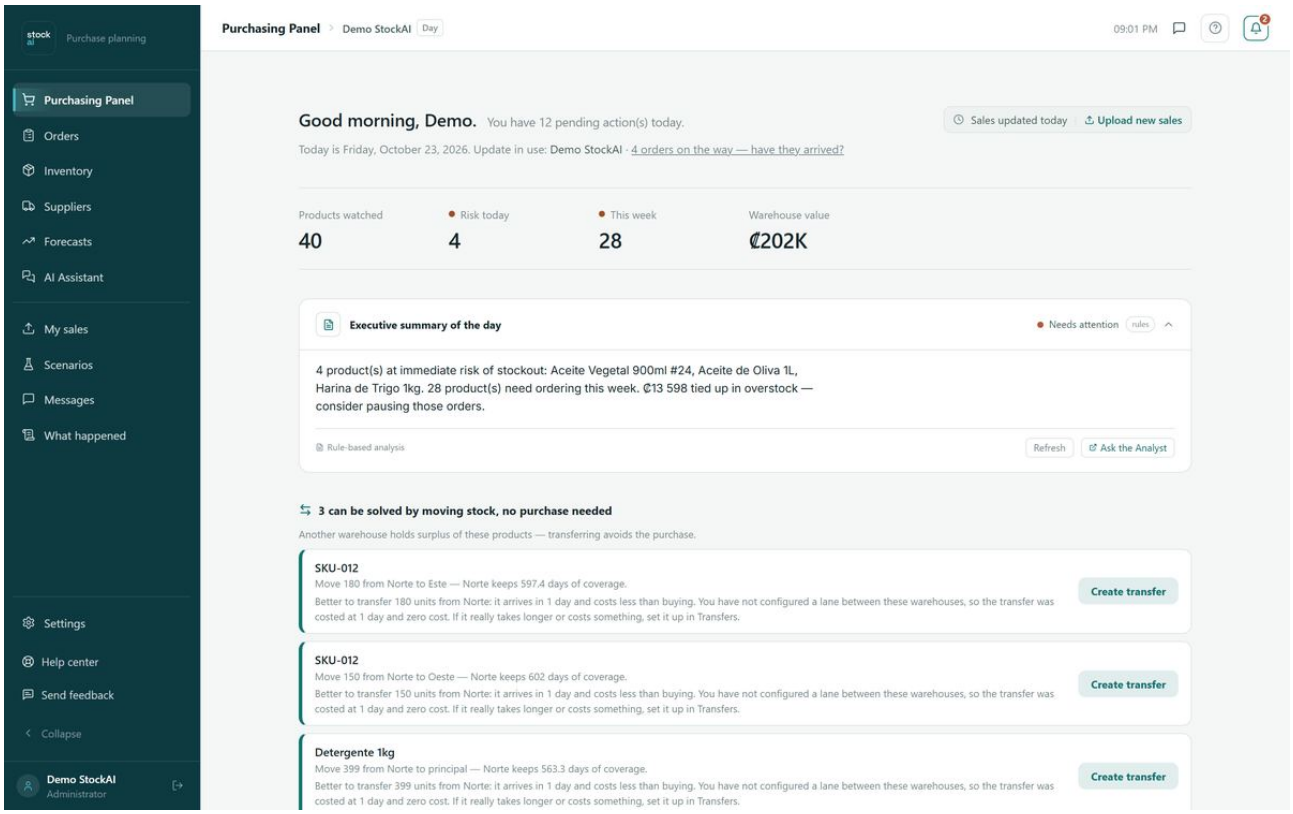
The screen where you decide what to buy today: review each recommendation, approve or reject it, adjust quantity and supplier, and save the purchase order in one click.

The Purchasing Panel is the first item in the sidebar and the screen the app opens on. It combines the demand forecast of the update in use with the stock you have on file and leaves you a short list of decisions: what to order today, what can wait until this week, how much and from whom.

> Who can use it
>
> Admin and analyst approve, reject, change quantities and suppliers, save orders, create transfers and log arrivals. A viewer sees everything, but instead of the buttons reads "Your role cannot generate orders", the supplier is plain text, the quantity cannot be edited and the cart never appears. They do not see "Create transfer" either, nor the budget box while no budget is in force.



The same card, seen with the viewer role.



The top of the panel: greeting, indicators and the first list of decisions.

BEFORE YOU HAVE DATA

If your company has no trained update yet, the panel shows no figures: it shows "You don’t have data yet" with two ways forward.

Upload my sales history	Takes you to My sales to load your sales file.
Try it with demo data	Loads sample sales for 5 products without touching your data.
No stock loaded yet	Shown when there is a forecast but no product has stock. "Go to Inventory" takes you to record it: no stock, no traffic light.

THE HEADER

Good morning, {name}.	The greeting. Next to it, "You have N pending action(s) today." counts the lines you have not decided yet.
Today is … · Update in use	The date and the name of the sales upload the whole screen was computed from.
N deliveries to confirm · Confirm	Shown when orders are past their expected arrival date. "Confirm" opens the arrival form of the first one (the same one as in Orders).
N orders on the way — have they arrived?	When none is late but some are open, this link takes you to Orders.
Data freshness	On the right, the label saying when your stock and sales were last updated.

If your stock or sales have gone too long without an update, the line "The signal is out of date" appears with the days and the "Update my stock" and "Upload this month's sales" links. The X

hides it in this browser tab only; under the indicators the note "These figures are computed on out-of-date data" stays.

THE FOUR INDICATORS

Products watched	How many products the update in use covers.
Risk today	Products in Order now (with a red dot when there is any).
This week	Products in Order soon.
Warehouse value	Stock times unit cost. Shows "—" when no product has a cost: the value is unknown, not zero.

If some products have no stock on file, a line below says how many are left out ("{n} of {total} are not counted") with the "Record the stock for these products →" link. If none is counted, Risk today and This week show "—" instead of 0.

EXECUTIVE SUMMARY OF THE DAY

A paragraph that tells the situation in words. Your company’s AI assistant writes it; if it does not answer in time (11 seconds) or no assistant is configured, you see a rule-based version built from the same figures. The refresh button in the box asks again and the link opens the AI assistant.

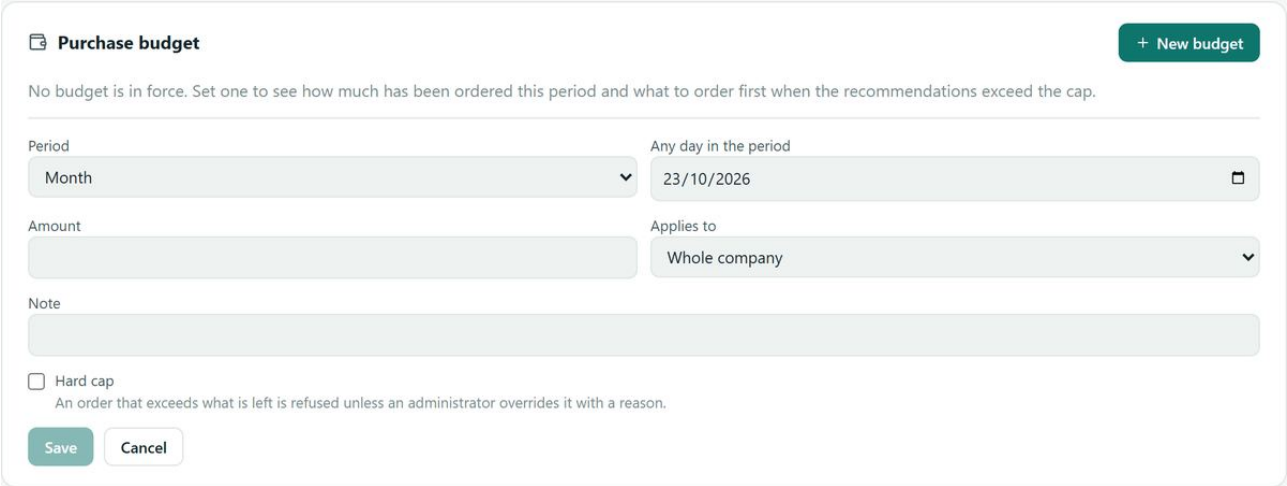
TRANSFERS BEFORE PURCHASES

If you have two or more warehouses and another warehouse holds surplus of a product, "N can be solved by moving stock, no purchase needed" appears before the purchases. Each line says how much to move, from where to where, and how much coverage the source warehouse keeps. Three are shown and "Show N more" opens the rest.

1. Read the line: "Move 40 from North Warehouse to Central Warehouse — North Warehouse keeps 12 days of coverage".
2. Click "Create transfer".
3. The line changes to "In transit": the stock has left the source warehouse and counts as on the way for the destination.
4. When it arrives, log it in Orders, "Transfers" tab.

PURCHASE BUDGET

The "Purchase budget" box caps what gets ordered in a period and tells you what to order first when the recommendations cost more than what is left. With no budget in force it says "No budget is in force…" (a viewer does not see the box in that case). It is a guide only: it creates no orders and changes no recommended quantity.



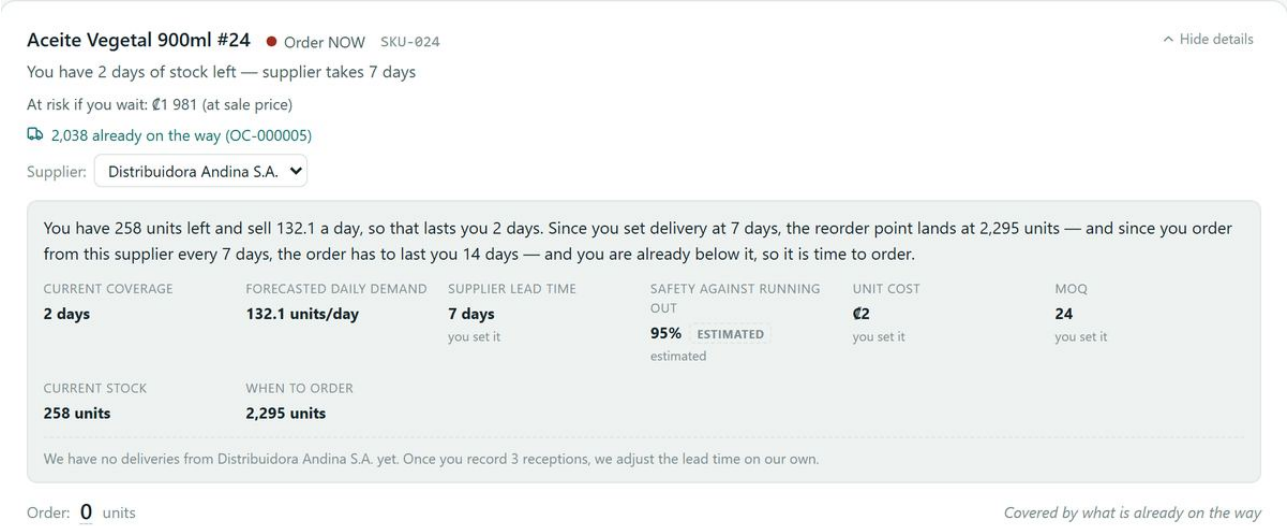
The form of a new budget, opened with "New budget".

New budget / Edit	Open the form. Edit creates a new revision of the same budget.
Budget	Picker to choose which one to look at when there are several.
Period	Month, Quarter or Custom range. With month or quarter, "Any day in the period" is enough; with a custom range you pick From and To.
Amount	The cap, in your company’s currency.
Applies to	Whole company, a Warehouse, a Supplier, a Category (text) or a Cost center (including the ones below it). A user limited to some warehouses can only create warehouse budgets.
Inside another budget	Shown when another budget already exists. Nests this one under it: the one above can limit it ("The budget above it limits this one to …").
Note	Free text.
Hard cap	An order that exceeds what is left is refused unless an administrator overrides it with a reason. Unticked, the order goes through and is recorded.
Budget active	Only when editing: untick it to pause the budget without deleting it.

With a budget in force you see "X left of Y", the days left in the period, a usage bar, Received and On its way, the projected close and the plan sentence: "Everything recommended fits…" or "What is left funds N lines in full and M in part…; K are deferred". "Show N lines" lists every product with its status. Each card carries the same mark: Funded within budget, Partly funded: budget, Deferred: budget or Cost unknown.

THE CARDS: "URGENT — ACT TODAY" AND "THIS WEEK"

"Urgent — act today" lists the products in Order now and "This week" those in Order soon; the number next to the title counts the ones you did not reject. Each card is one decision.



A card with "Why?" open.

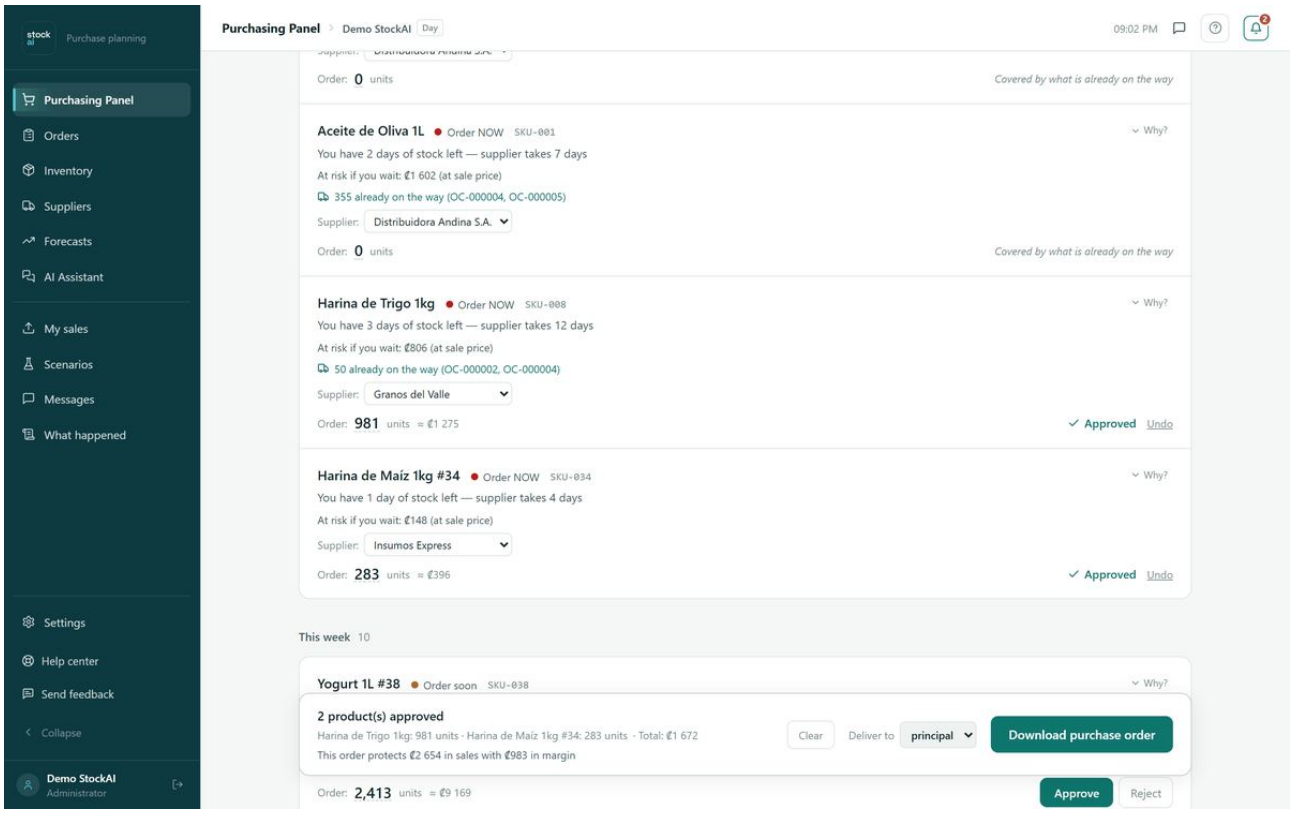
Name, coloured dot and code	The product and its traffic-light signal.
Reason	"You have 3 days of stock left — supplier takes 10 days", or the coverage and "order this week".
Order first / At risk if you wait	The line with the most money at risk carries "Order first"; the amount is at sale price or, when there is none, at cost. With neither it says "Value unknown".
What is already on the way	If the product has open orders or transfers, the card subtracts them and says so.
Supplier:	Drop-down to send the line to another supplier (or "No supplier"). Changing it marks the line as modified.
Email or WhatsApp missing · Complete	The supplier has no way to receive the order. "Complete" opens its record in Suppliers.
Taking X d (usually Y)	The supplier has been delivering slower than its own history.
Why? / Hide details	Opens the breakdown: the sentence that explains the recommendation, Current coverage, Forecasted daily demand, Supplier lead time, Safety against running out, Unit cost, MOQ (minimum order), Current stock and When to order (reorder point). Values nobody configured carry the "estimated" tag, and below you read how far the lead-time learning for that supplier has got.
Order: N units ≈ amount	The suggested quantity. Click the underlined number, type another and press Enter: the line becomes modified and goes into the cart.
Approve	Puts the line in the cart; the card shows "Approved" and "Undo" (which takes it out of the cart without counting as a rejection).
Reject	Takes it off the list (it fades) and, when you save the order, records that you did not follow the recommendation. "Restore" brings it back.
Covered by what is already on the way / Enough stock for now	Shown instead of the buttons when the suggested quantity is 0.

Ordered on OC-000123	The line is already on an order: it cannot be ordered again from here and counts as on the way until you log the arrival.

If some product uses values we estimated, under the cards you read "N products use values we estimated" with the "What to configure first" link. If you reject everything, or there is nothing to order, you see "No pending actions" (or, with old data or nothing counted, a sentence saying we cannot confirm it).

THE CART AND THE PURCHASE ORDER

Once you approve the first line, a fixed bar appears at the bottom: the cart.



The cart with two approved products, fixed at the bottom of the screen.

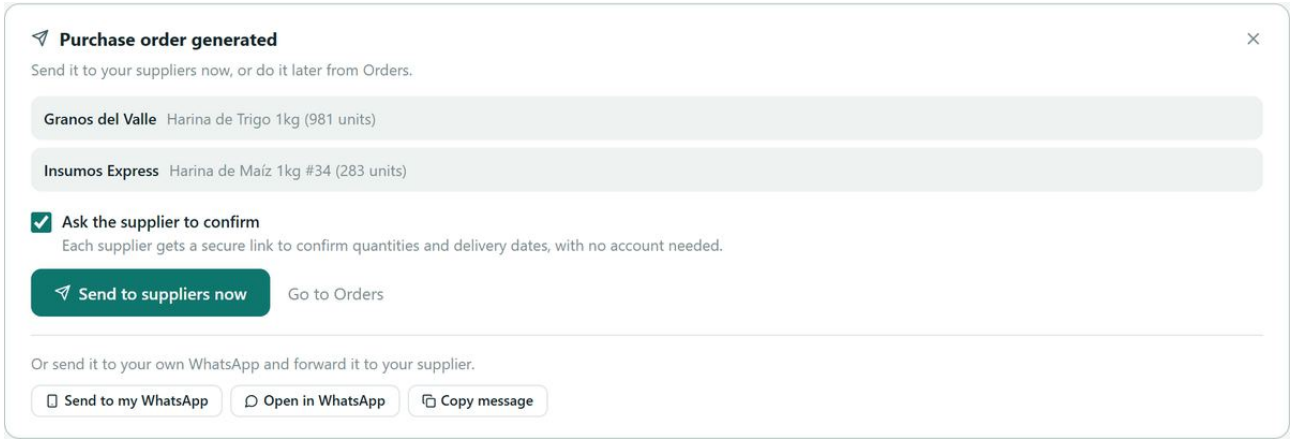
N product(s) approved	With each product and its quantity below, and the Total. Lines with no cost are left out of the total and counted separately ("N with no cost on file, left out of the total").
This order protects … in sales with … in margin	Only from the lines with a sale price and a cost; it says so when prices are missing.
Clear	Turns every approved line back into pending.
Deliver to	Only with two or more warehouses: the warehouse that receives the order.
Cost center	Only if your company has active cost centers: which one the spend is charged to.
Download purchase order	Saves the order and downloads the CSV file (SKU, Product, Quantity, Supplier, Estimated Value).

The panels above the cart

Budget warning	When the order goes over what is left of a budget. With a normal budget you can still order and type a Reason (optional). With a hard cap only an administrator can pass it, and the Reason for going over the cap (required) is recorded; everyone else reads "Only an administrator can approve this order".
Worth increasing the quantity	When a supplier has price breaks and ordering more pays for the cost of holding the extra: it shows the net saving, the holding cost, the extra cash out and the extra days of coverage. "Increase quantity" changes the line's quantity and unit price. When a break is not worth it, a note says why (it would leave you overstocked, the saving is too small…).
Cash — accounts payable	What falls due this week, what is overdue and what is due over the next 30 days, from your suppliers' payment terms. Type your Cash available: and press Enter: you see "The recommended purchase fits" or "does NOT fit", with what is already committed, this purchase and how much you would be short. StockAI does not store your balance: you type it each time.

Save and send the order

1. Review the cards; adjust quantity or supplier where needed.
2. Click "Approve" on what you will order and "Reject" on what you will not.
3. If they appear, choose "Deliver to" and "Cost center".
4. Click "Download purchase order". The button reads "Saving the order…" and ignores a second click.
5. You see the notice "Order OC-000123 saved" with the "View orders" link. The ordered lines show "Ordered on OC-000123".
6. Below, the "Purchase order generated" box shows which products go to each supplier.
7. Keep "Ask the supplier to confirm" ticked if you want each supplier to get a link to confirm quantities and dates (the box remembers your choice).
8. Click "Send to suppliers now", or "Go to Orders" to do it later. When it finishes it lists who it went to (email, WhatsApp) and who it did not, and why.



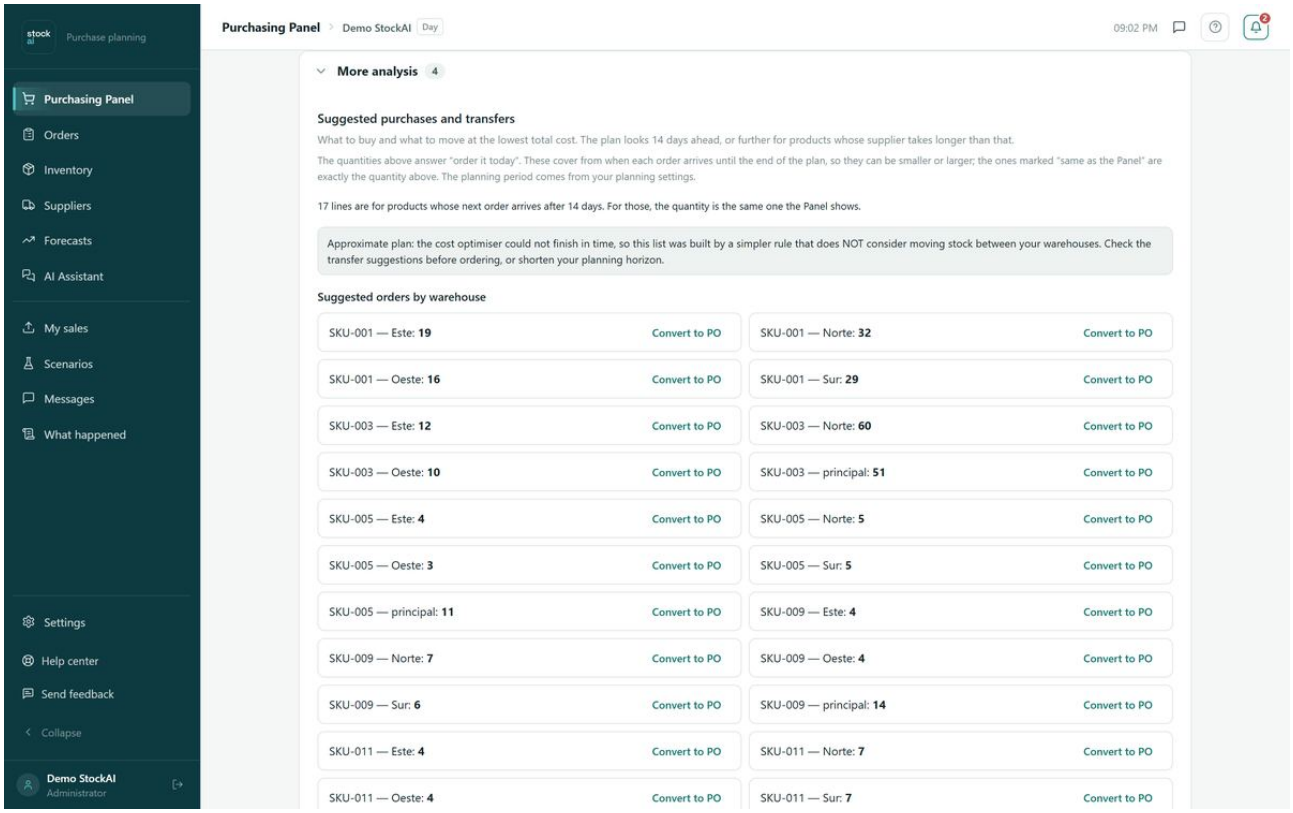
Just saved: the order can be sent without leaving the panel.

In the same box, "Send to my WhatsApp", "Open in WhatsApp" and "Copy message" give you the order text to forward to the supplier yourself. If the order needs approval, instead of sending you see "This order needs approval before it is sent to the supplier" and the "Request approval" button.

> One cart, one order
>
> If the connection drops and you click again with the same cart, no second order is created: you see "This order was already saved; no second one was created.". If the file downloaded but the order was not saved, the notice "File downloaded, order not saved" asks you to generate it again.

MORE ANALYSIS

Below the cart, the folded "More analysis" box says how many sections it holds and which. Click it to open it (it stays open in this tab).



More analysis, open.

Suggested purchases and transfers	The optimizer’s plan: what to buy and what to move at the lowest total cost over your planning horizon. Its quantities can differ from the cards (the cards answer "order it today"; the plan covers from when each order arrives until the end). Lines marked "same as the Panel" use the same quantity. "Convert to PO" saves that line as a purchase order at once. If the optimizer did not finish, a notice says the plan is approximate and ignores transfers.
Get ahead — upcoming demand peaks	Peaks the forecast sees before the signal turns red, with the date and "Order before …".
Demand changes	Products whose actual sales run above or below the forecast, as a percentage.
System recommendations	Up to 8 sentences with a Suggested action (pause the next order, review the safety buffer…), without repeating the cards.
Capital opportunities	How much you hold in products with excessive coverage, and the top three.

If the optimizer left products out because they have no stock on file, "N product(s) still need counting" appears with the list. At the bottom, "Last updated" says how long ago the screen was loaded and "Refresh data" recomputes it.

ON A PHONE

On narrow screens the panel becomes a list of cards with the same decisions, the same cart (in a bottom sheet) and the same panels; the data and what you save are identical.

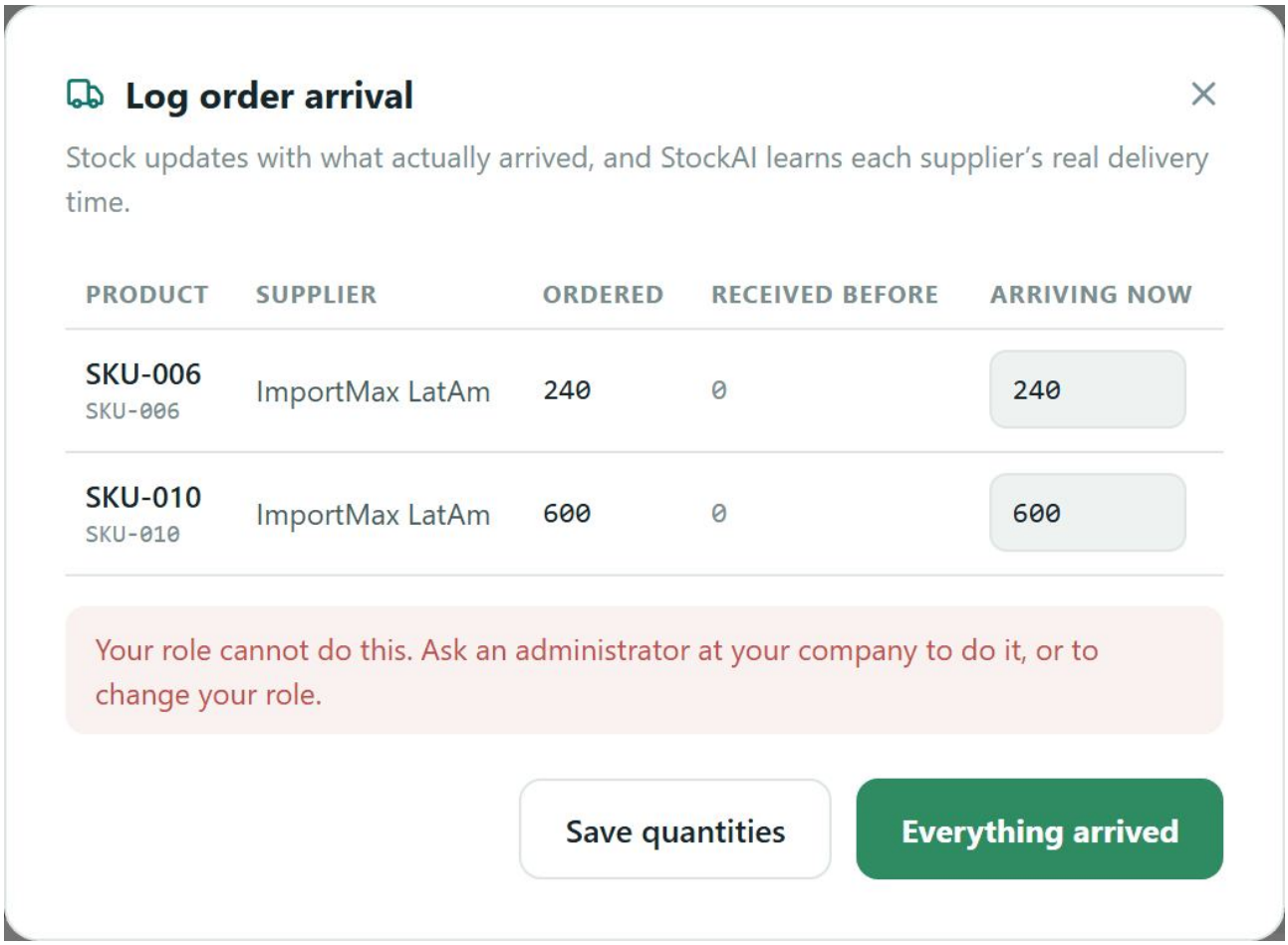
Go on to Orders to send, receive and pay the orders. The colour rule is in The traffic light.

Orders, step by step

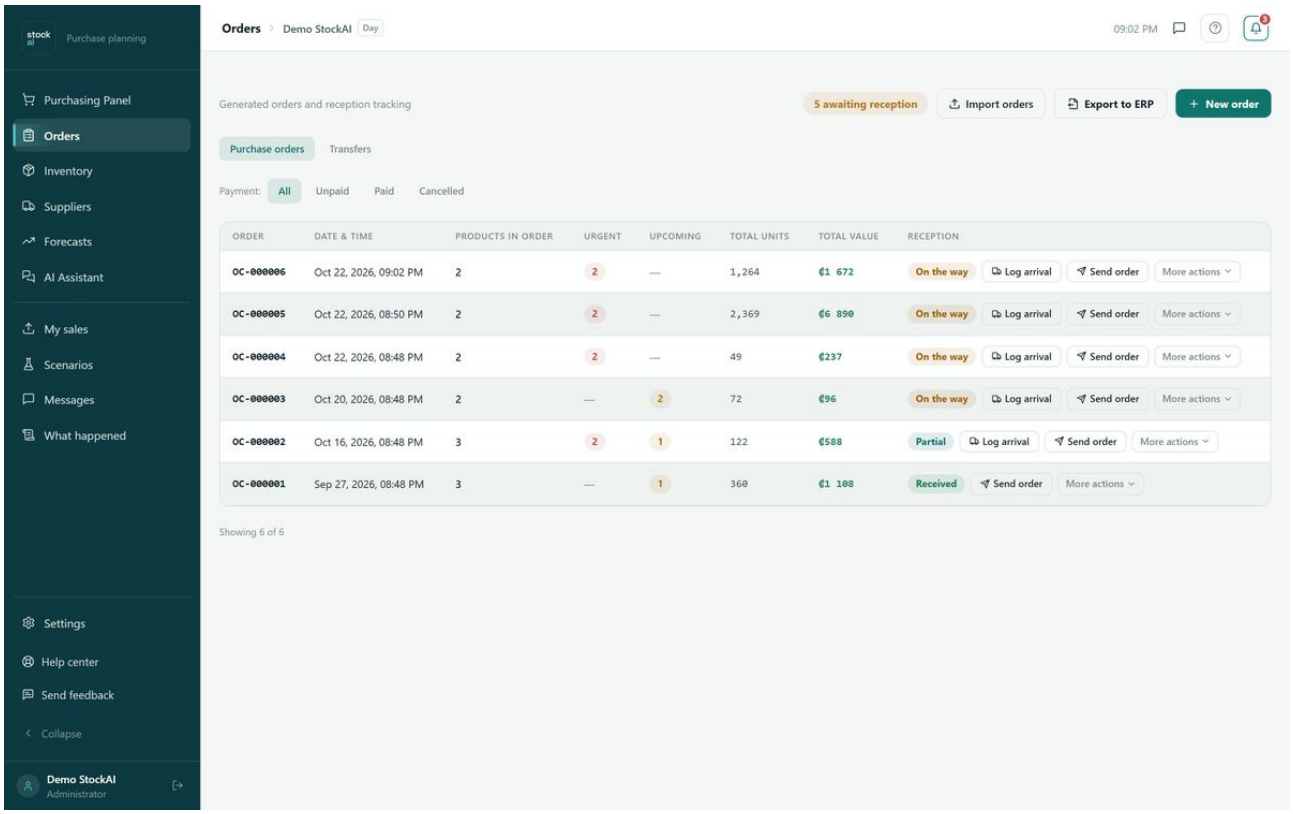
All your purchase orders in one table: send them, log what arrived, mark them paid, cancel them, export them to your ERP or create one by hand.

Orders, in the sidebar, keeps every order you generated in the purchasing panel, created by hand or imported. It is where you log the arrival of goods: that updates stock and teaches StockAI each supplier’s real lead time.

> Who can use it
>
> Admin and analyst do everything. A viewer sees the orders and can open "Export to ERP" to look (without the ERP number field). They do not see "New order" or "Import orders", and "More actions" shows no undo, pay or cancel. They do see "Log arrival", "Send order" and the WhatsApp buttons, but using them the server refuses with "Your role cannot do this…" and nothing changes.



What a viewer sees when trying to log an arrival: nothing is saved.



Orders with the orders table.

THE TOP OF THE SCREEN

N awaiting reception	How many orders are still waiting for goods (On the way, Partial or Did not arrive).
Import orders	Creates orders from a CSV or Excel file. See Import orders.
Export to ERP	Downloads orders in your ERP’s layout and records their number. See Export to ERP.
New order	Creates an order by hand. See New manual order.
Purchase orders / Transfers	Tabs that only appear with two or more warehouses.
Payment: All · Unpaid · Paid · Cancelled	Filters the table. If none matches: "No order matches this filter.".

With no orders you see "No orders generated yet" and the "Go to the Purchasing Panel" button. At the bottom, "Showing N of M" and "Show more" load orders 50 at a time.

THE COLUMNS

Order	The number, OC-000123.
Date & time	When it was saved.
Products in order	How many lines it carries.
Urgent / Upcoming	How many lines were in Order now and in Order soon when ordered.

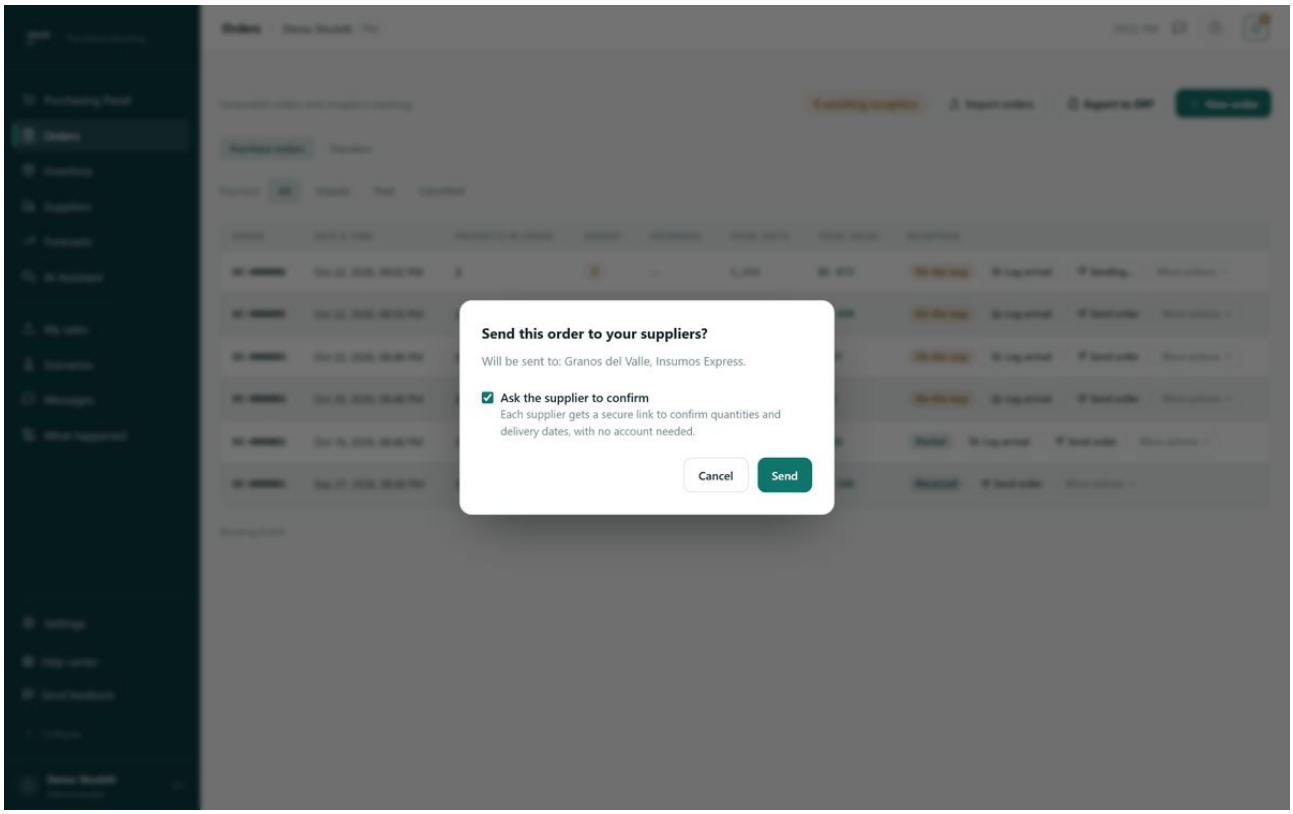
Total units / Total value	Sum of units and value. "—" when no line has a cost; it warns when lines in another currency have no rate.
Reception	The status and every action for the order.

The states of an order

On the way	Nothing has arrived yet. The units count as on the way in the traffic light.
Partial	Part arrived; the rest is still on the way.
Received	Everything arrived.
Did not arrive	You saved the reception with every quantity at 0.
Cancelled	You cancelled it: it stops counting as on the way and leaves the overdue receptions and the payments calendar.
Arrival to confirm · Late N d	Extra marks when the expected arrival date (from the supplier's lead time) has passed; the button changes to "Confirm arrival".
Needs approval / Pending approval / Approval rejected / Center or chain missing	Only if your company uses approvals.
Paid	You marked it as paid.
Waiting for supplier / Confirmed / Change proposed / Declined	The supplier's answer to the confirmation link. Click the mark to see it.

SEND AN ORDER TO THE SUPPLIER

1. In the row, click "Send order".
2. The "Send this order to your suppliers?" dialog says who it will go to and who will be skipped for having no email or WhatsApp.
3. Keep or untick "Ask the supplier to confirm": each supplier gets a secure link to confirm quantities and dates, with no account needed.
4. Click "Send". The row then reads "Order sent", "Partially sent — check skipped suppliers" or "Could not send — no supplier has contact info on file", and who got the confirmation link.

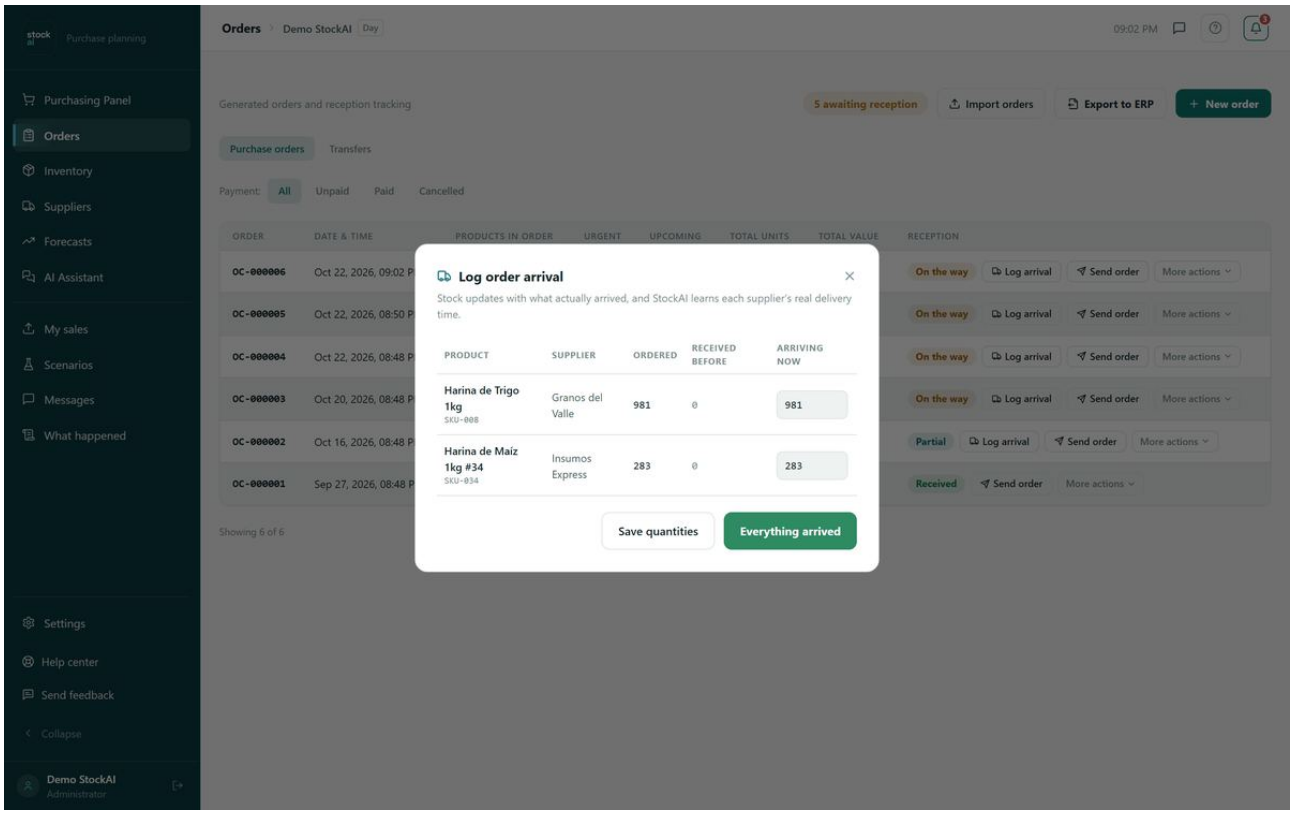


The confirmation before sending.

If the order needs approval, "Request approval" appears instead of "Send order" (and then "Waiting for approval"). When the chain is unresolved, you pick the Cost center and click "Assign".

LOG THE ARRIVAL

1. Click "Log arrival" (or "Confirm arrival" if it is late).
2. The "Log order arrival" dialog lists each product with Supplier, Ordered, Received before and Arriving now, prefilled with what is still missing.
3. If everything arrived, click "Everything arrived".
4. If part arrived, correct Arriving now on each line and click "Save quantities". The order becomes Partial and you can log the rest later: arrivals add up.



The arrival form.

Stock goes up in the order's destination warehouse. When the order becomes Received, StockAI records how long the supplier took; with enough deliveries that learned time replaces the configured one (see Learned lead time).

MORE ACTIONS

Next to the everyday actions, "More actions" opens the rest. Only those that make sense for that order's state appear.



"More actions" open on an order.

Send to my WhatsApp	Sends the order to your own WhatsApp so you can forward it. With no linked number: "No number on file — use copy or open WhatsApp".
Open in WhatsApp	Opens WhatsApp with the order text ready.
Copy message	Copies the text to the clipboard ("Copied").
Undo reception	On Received or Partial orders. The units come back out of your warehouse and what that arrival taught about the lead time is removed. If some were already sold, it is refused and tells you which product and warehouse is short.
Undo send	On sent orders still On the way and unpaid. It only corrects the record: the email or WhatsApp that went out cannot be recalled. The order leaves the payments calendar.

Mark as paid / Unmark paid	Only on sent orders. Paid, it leaves the panel’s cash calendar; unmarking puts it back on its original due date.
Cancel order	On orders On the way or Did not arrive, unpaid. Asks for confirmation. StockAI does not write to the supplier: if you already sent it, tell them yourself.
Reopen order	On a cancelled order: it counts as on the way again, exactly as before.

> What cannot be undone
>
> A message already sent to the supplier cannot be recalled. A paid order cannot be marked as not sent or cancelled until you unmark the payment.

> A saved order is not deleted
>
> There is no "delete order". If you created one by mistake, cancel it: it stops counting as on the way and the record of what happened stays.

THE SUPPLIER’S ANSWER

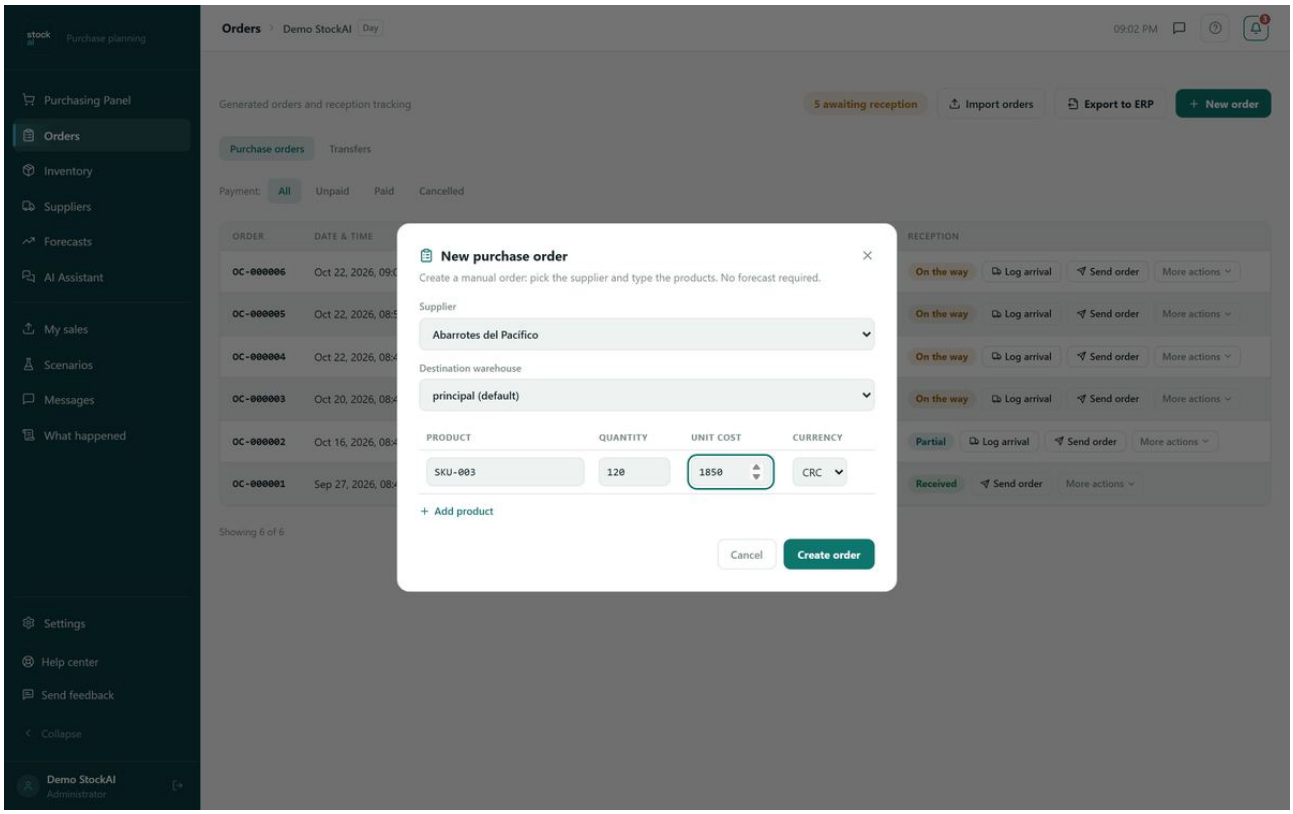
If you sent with "Ask the supplier to confirm", the row shows a mark with their answer. Clicking it opens "Supplier confirmation", line by line: promised date, proposed quantity, the supplier’s note, or "The supplier cannot supply this line".

Accept change	The promised date replaces the arrival StockAI estimated for that line. It is recorded under your name and cannot be undone.
Let them answer again	Reopens the link of a supplier who already answered.
Revoke link	The supplier can no longer open it; their answers are kept. To give them a new one, send the order again.

What the supplier sees is in Supplier portal.

NEW MANUAL ORDER

To order something that did not come from the forecast. You need at least one registered supplier; if there is none, the dialog says so.



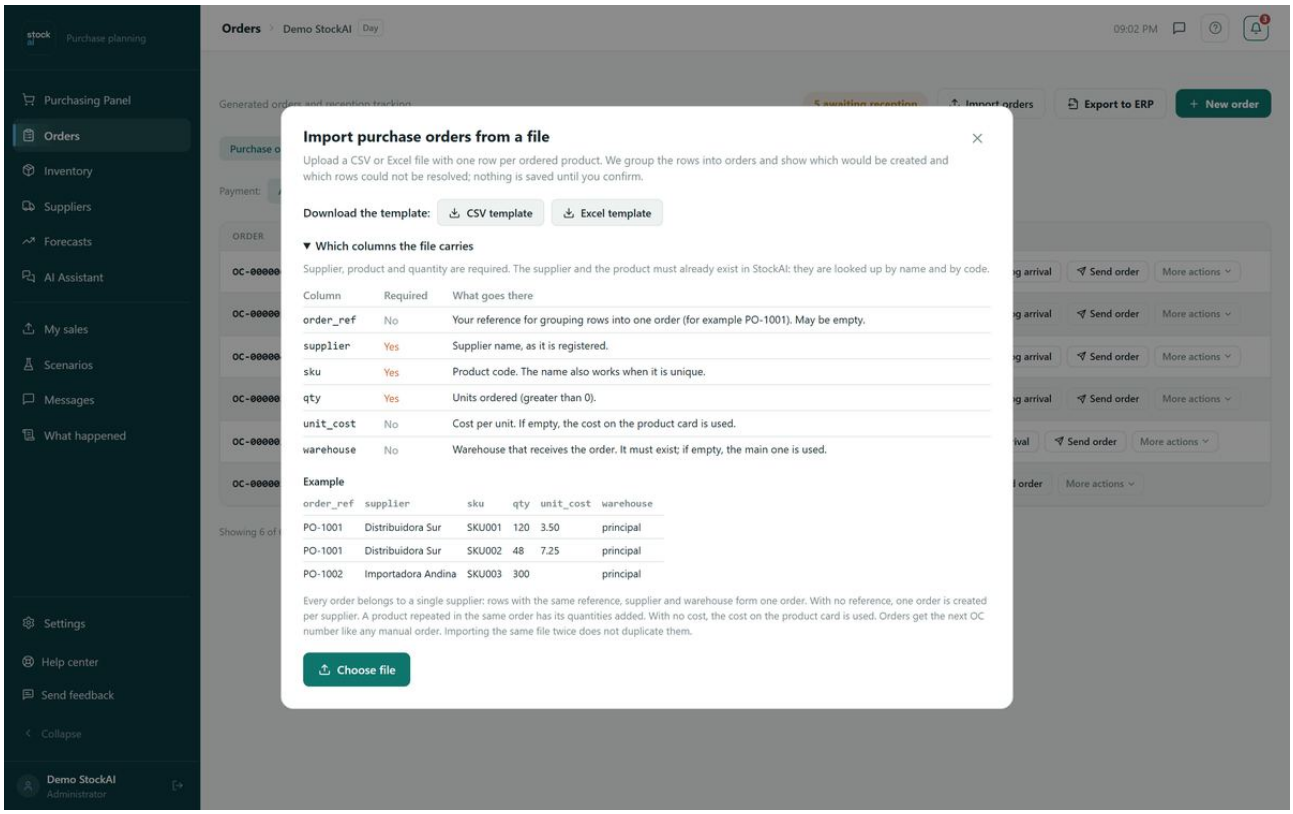
A manual order half filled in.

1. Click "New order".
2. Pick the Supplier (if you only have one, it is already picked).
3. With several warehouses, pick the Destination warehouse.
4. On each line type the Product (code), the Quantity (above 0) and, optionally, the Unit cost and the Currency (when your company handles others).
5. Click "Add product" for another line; the bin icon removes one.
6. Click "Create order". The order appears in the table with the next OC number.

If a quantity is 0 or negative, or a cost is negative, you read "Check the quantities and costs..." and the button stays disabled.

IMPORT ORDERS

"Import orders" opens "Import purchase orders from a file". Supplier, product and quantity are required, and both must already exist in StockAI.

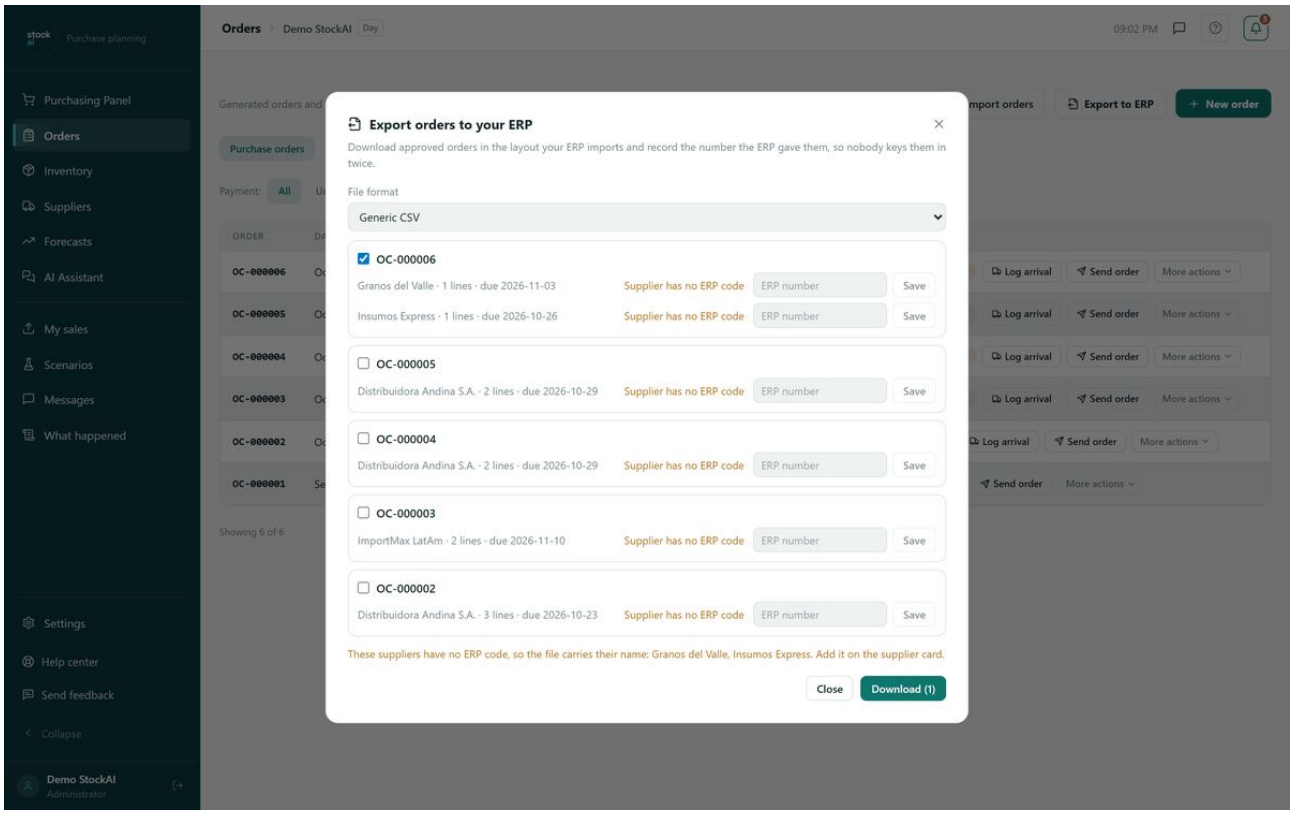


The import dialog before choosing a file.

1. Download the CSV template or the Excel template if you have no file of your own. The "Which columns the file carries" table explains each one (`order_ref`, `supplier`, `sku`, `qty`, `unit_cost`, `warehouse`), which are required, and shows an example. If your file uses other headers, you map them in the next step.
2. Click "Choose file".
3. Check "How we read your columns" and fix any that is wrong (or set it to "Do not import").
4. Read the preview: "Orders that would be created", rows added together, rejected rows and why. Nothing is saved yet.
5. Click "Create orders (N)".

Rows with the same reference, supplier and warehouse form one order; with no reference, one order per supplier. Importing the same file twice does not duplicate orders.

EXPORT TO ERP



The ERP dialog.

1. Click "Export to ERP".
2. Pick the File format. Those marked "unverified" were written from the vendor documentation: try a single order first.
3. Tick the orders to take. Each shows its suppliers, lines and arrival date, and warns "Supplier has no ERP code" or "Mixed currencies".
4. Click "Download (N)" and import the file into your ERP.
5. When the ERP gives it a number, type it in "ERP number" and click "Save": the order leaves this list and nobody keys it in twice.

Each supplier’s ERP code is set on its record (Suppliers). With the list empty: "No approved orders are waiting for your ERP to confirm them.".

ORDERS TO APPROVE AND DELEGATION

If you are an approver and orders are waiting for you, "Orders to approve" appears at the very top with "Approve" and "Reject" (which asks for a reason). Below it, "Delegate my approvals" lets someone else approve for you for a few days. All of it is explained in Approvals.

THE TRANSFERS TAB

With two or more warehouses, the "Transfers" tab lists moves between warehouses with their status and actions:

Awaiting approval	It crosses two legal entities: it waits for an administrator, who Approves it (stock leaves the source) or Rejects it (nothing moves). It can still be cancelled.
In transit	It left the source. "Everything arrived" or "Record quantities" log the arrival; "Cancel transfer" puts the stock back in the source.

Partial	Part arrived; arrivals add up. "Close with loss" records what did not arrive as shrinkage.
Received	Everything arrived. An administrator can "Reverse" a received or partial one with a Reason (required): everything goes back to the source, unless part has already left the destination.
Cancelled / Rejected / Reversed / Closed with loss	Final states.

See Warehouses and transfers.

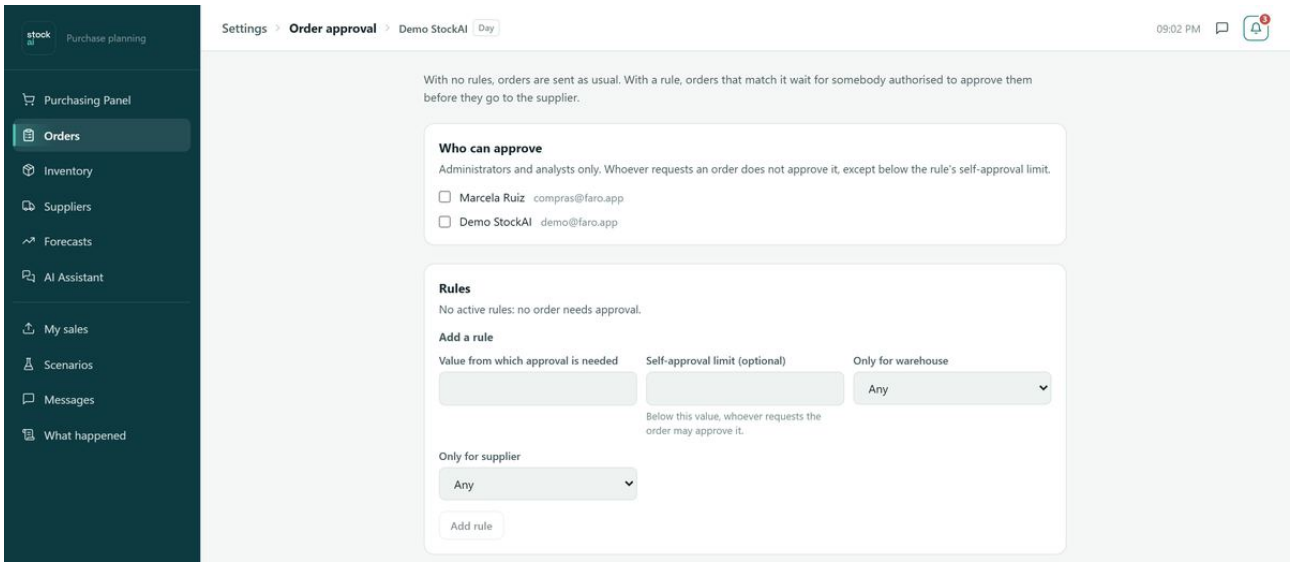
On a phone, Orders is a list of cards: tap an order and its actions open in a bottom sheet.

Order approvals, step by step

Decide which purchase orders need approval before they go to the supplier, who can approve them and, when needed, multi-level chains by cost center.

The Approvals screen opens from Settings. Until it has rules or chains, no order needs approval and everything works as usual.

> Who can use it
>
> Only an admin sets up approvals; any other role reads "Only administrators set up approvals.". Approving or rejecting orders is done by the people the admin picks, on the Orders screen.



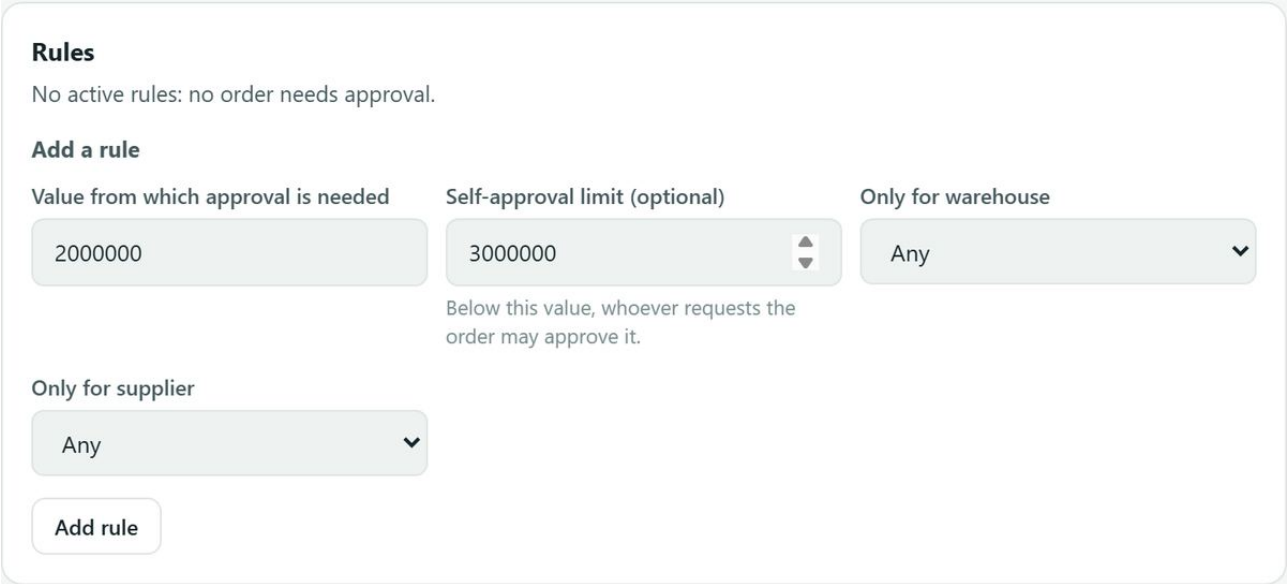
Approvals, top to bottom.

WHO CAN APPROVE

The list shows your company’s active admins and analysts. Tick each person who may approve; it saves at once. Whoever requests an order does not approve it, except below the rule’s self-approval limit.

RULES

A rule says: "orders of this value or more need approval". The line under the title says whether approvals are on or no order needs one.



A new rule about to be added.

1. In "Value from which approval is needed" type the amount (above 0).
2. Optional: "Self-approval limit". Below that value, whoever requests the order may approve it themselves. It must be above the rule's value; otherwise it says so in red.
3. Optional: "Only for warehouse" (if you have more than one) and "Only for supplier". "Any" means no limit.
4. Click "Add rule".

Orders of X or more	Each rule, with its scope (warehouse, supplier or "Any") and its self-approval limit.
Pause / Resume	Switches the rule off for a while without losing it. A paused rule is greyed out.
Delete rule	Asks for confirmation. Orders that depended on it stop needing approval.

COST CENTERS

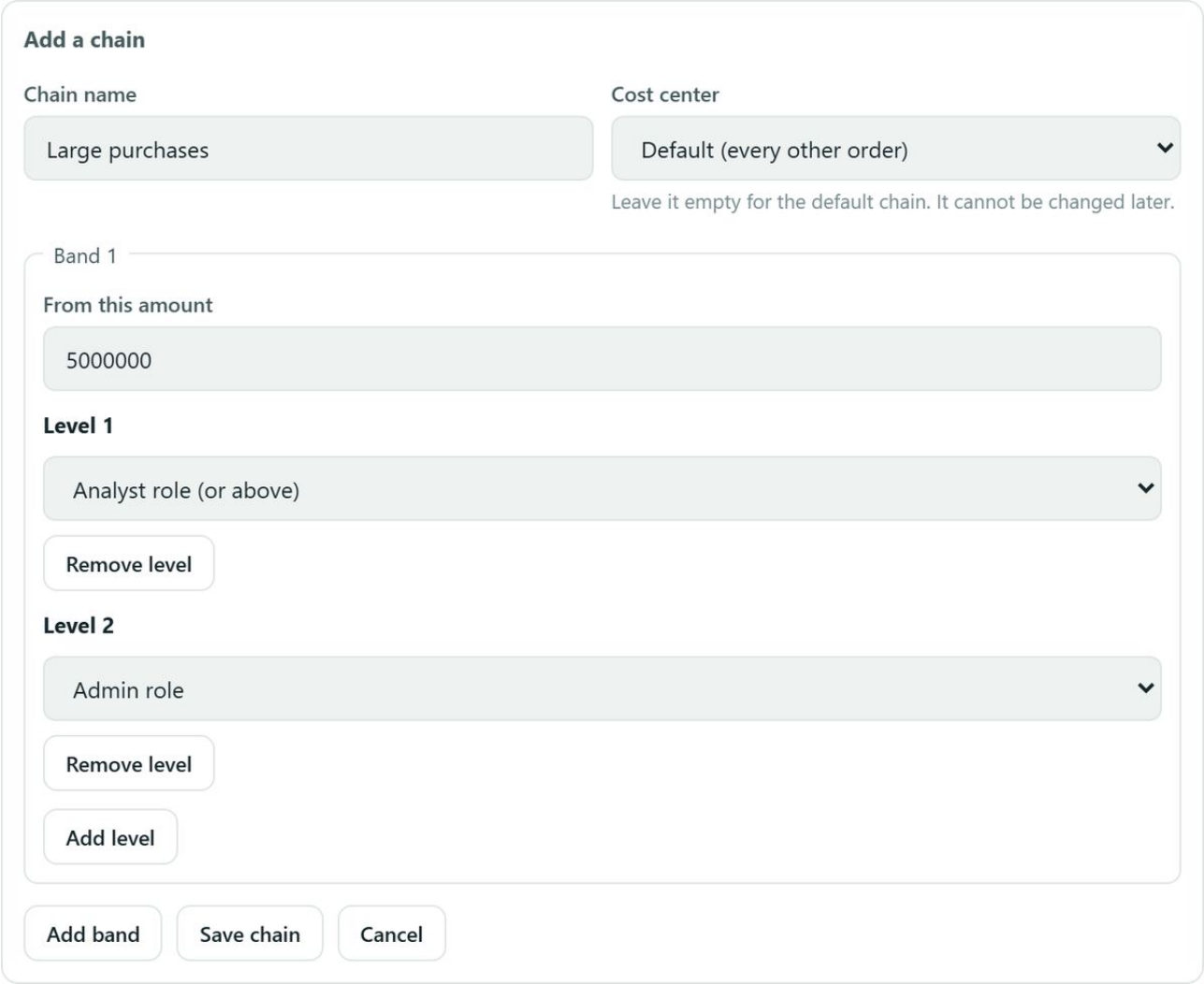
The places money is spent from (a branch, a department). An order is charged to one when it is created (the panel's cart shows "Cost center") and a budget can be set on one.

1. Under "Add a cost center" type the Code and the Name.
2. In "Inside" pick its parent center, or "None (top level)".
3. Click "Add center". It appears in the tree, indented under its parent.

A center is never deleted: "Pause" takes it out of the pickers and "Resume" brings it back, because old orders keep pointing at it.

APPROVAL CHAINS

For companies that need more than one level: from an amount up, an order needs one or more levels of approval, in order. Whoever asked for the order never approves a level, and nobody approves two levels of the same order.



A two-level chain being edited.

1. Click "Add a chain" and type the Chain name.
2. In "Cost center" pick the center it covers (and the ones below it), or leave "Default (every other order)". It cannot be changed later.
3. In "Band 1", type "From this amount".
4. On each Level, pick Who approves: "Analyst role (or above)", "Admin role" or "Named people" (tick the people).
5. Use "Add level" / "Remove level" and "Add band" / "Remove band" for larger amounts with more levels.
6. Click "Save chain".

Each saved chain shows its scope, its bands ("From X") and its levels; "Edit chain" changes it and "Pause" switches it off.

> No default chain
>
> If there are active chains but no default one, orders with no cost center (or with a center no chain covers) cannot be sent until you add a default chain or give them a center. The screen warns about it in red.

APPROVE AND REJECT ORDERS

Decisions are not made here but in Orders, in the "Orders to approve" box, which only an approver sees when something is pending. Notifications and emails take you straight to it.

1. Read the order: number, amount, "Requested by …", suppliers, warehouse, number of products and, with chains, "Level N of M".
2. Click "Approve". If it was the last level, the order can now be sent.
3. Or click "Reject", type the Reason for rejecting (required) (at least 3 characters) and click "Reject the order".

If it is your own request above what you can approve yourself, you read that somebody else has to decide it. Whoever asked for the order sees it in Orders with the "Pending approval" mark, and the "Request approval" button becomes "Waiting for approval". Approvers can also decide from a link: see Approve by link.

DELEGATE MY APPROVALS

In Orders, under the inbox, "Delegate my approvals" lets someone else approve or reject what you could while you are away.

1. Click "Delegate approvals".
2. Pick "Who stands in for you", "From" and "Until (included)", and optionally a Note (optional).
3. Click "Save delegation". You see "{person} covers for you from … to …" and it ends by itself on the last day.
4. To end it sooner, click "Revoke" and confirm.

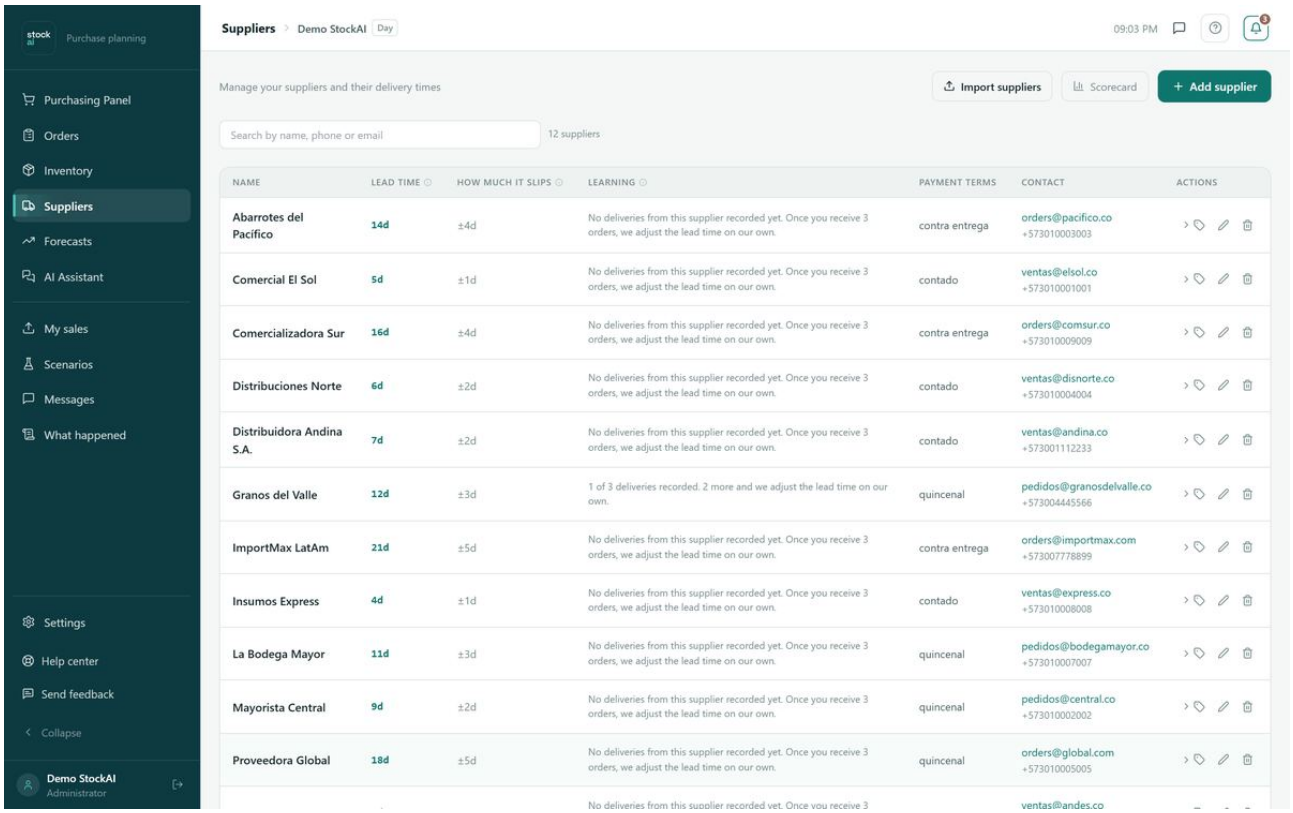
Your substitute decides only in your warehouses and within your limits; decisions are recorded in both names.

Suppliers, step by step

Register who you buy from: contact details to send them orders, lead time, payment terms and price breaks. StockAI learns their real lead time from your receptions.

Suppliers, in the sidebar, is the list of who sells to you. Registering a supplier turns a stock alert into an order that can be sent, and is what lets you measure them in the Scorecard.

> Who can use it
>
> Admin and analyst create, edit and delete suppliers and price breaks. A viewer browses the list and the Scorecard. They do not see "Import suppliers", but they do see "Add supplier", the pencil and the bin: saving or deleting is refused by the server and nothing changes.



The supplier list.

THE TOP OF THE SCREEN

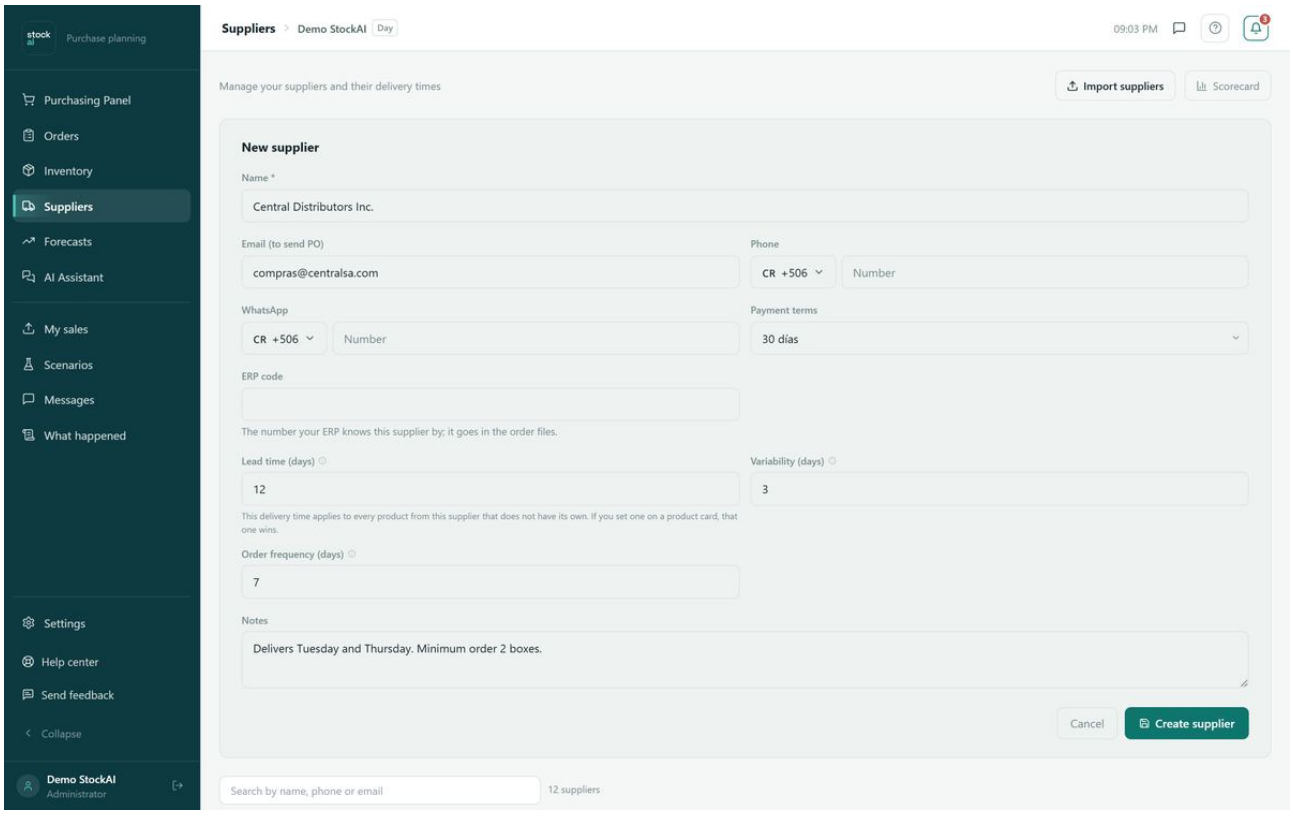
Import suppliers	Loads your list from CSV or Excel. See Import suppliers.
Scorecard	Opens the Supplier scorecard.
Add supplier	Opens the empty form.
Search by name, phone or email	Filters the list as you type; the X clears the search. On the right, how many suppliers match.

With no suppliers you see "You have no suppliers registered yet" and "Add first supplier". If the search finds nothing: "No supplier matches" and "Clear search". The list is paged 50 at a time.

THE COLUMNS

Name	With marks when needed: "Email or WhatsApp missing" (click to complete the record) or "Takes N d (usually M)" when it has been delivering slower than its history.
Lead time	Days from the order to the arrival.
How much it slips	The variability, ±days.
Learning	How far StockAI has got: "No deliveries from this supplier recorded yet...", "N of M deliveries recorded...", "Learned from N deliveries: X days on average..." (with how many arrive within how many days), or that every delivery arrived the same day and says nothing.
Payment terms	Those on its record.
Contact	Email (a link to write), phone and WhatsApp.
Actions	The tag icon opens the Price breaks; the pencil edits; the bin deletes.

CREATE OR EDIT A SUPPLIER



The form of a new supplier.

1. Click "Add supplier" (or a row’s pencil to edit).
2. Type the Name, the only required field. Write it as it appears on your products: it is compared ignoring case.
3. Fill in the other fields you know (below, what each one does).
4. Click "Create supplier" (or "Update"). "Cancel" closes without saving.

Email (to send PO)	Where purchase orders and the confirmation link go.

Phone / WhatsApp	With WhatsApp, orders can go out that way too. With neither email nor WhatsApp, sending skips this supplier.
Payment terms	Contado, 15 días, 30 días, 60 días, 90 días or Otro (cash, 15, 30, 60, 90 days or other). They feed the cash panel of the purchasing panel.
ERP code	The number your ERP knows the supplier by; it goes into the Export to ERP files.
Lead time (days)	Applies to every product of theirs that has no lead time of its own. Left empty we assume 15 days, but it is not recorded as "declared" by the supplier.
Variability (days)	How much it can vary: if it says 15 but sometimes arrives in 18, put 3. It starts at 3. More variability, more safety stock.
Order frequency (days)	How often you order from them. Weekly, put 7. It makes the suggested quantity last until your next order. Empty: no fixed cadence.
Notes	Special conditions, contact, remarks.

Deleting a supplier

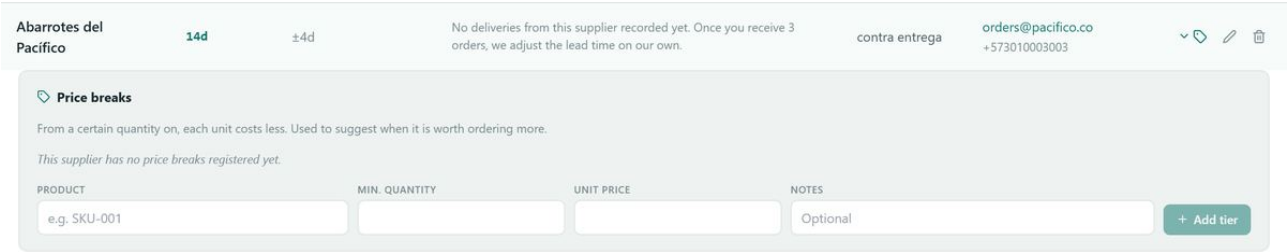
The bin asks for confirmation ("This action is irreversible."). The supplier disappears from the list and the pickers, and its name stays reserved: creating another one with the same name is refused.

How payment terms are read

The cash calendar interprets the text: "contado", "contra entrega", "anticipo", "prepago" and "COD" mean 0 days; "N meses" means N × 30; "quincenal" means 15; and in text like "30 días" or "net 30" the first number is taken. What is not understood — instalments like "2x30" or "30/60/90", ranges like "30-45 días", "a convenir" — stays as an unknown term and is reported as such, rather than filled with an invented number.

PRICE BREAKS

From a certain quantity on, each unit costs less. With breaks on file, the purchasing panel tells you when it is worth increasing the quantity.



A supplier’s price breaks.

1. Click the row’s tag icon.
2. In the form type the Product (code), the Min. quantity and the Unit price from that quantity (both above 0), and an optional Note.
3. Click "Add tier". Repeat for each step.
4. To remove one, click its bin; the "Price break deleted" notice offers Undo for a few seconds.

IMPORT SUPPLIERS

"Import suppliers" opens the same wizard as the order import: template, recognised columns (Name, Email, Phone, WhatsApp, Delivery days, Delivery variation, Days between orders, Payment terms, Credit days, Notes, Status), preview and confirmation. Only the name is required.

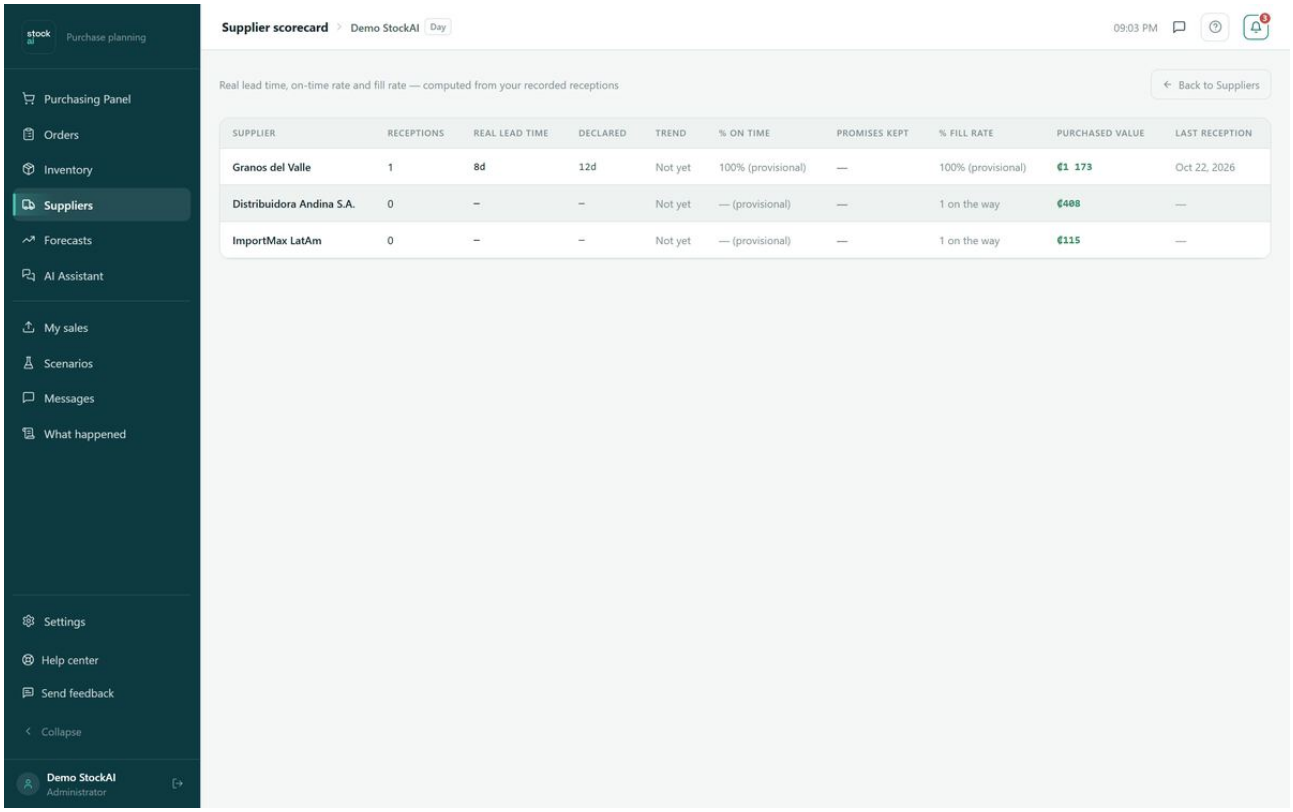
Leave them as they are	Suppliers that already exist (same name, ignoring case) are left untouched: only new ones are added. The safest choice.
Update them with the data in the file	Cells that carry a value are written; an empty cell never erases what you already have.

When it finishes: "Done: N suppliers created and M updated.". On a phone the list is made of cards; tapping one opens its record with contact, learning, price breaks, edit and delete.

Supplier scorecard, step by step

Compare what each supplier promises with what it delivers: real lead time, on-time deliveries, promises kept, fill rate and purchased value, all from the arrivals you record.

Open it with the "Scorecard" button in Suppliers, or at /proveedores/scorecard. It is read-only and every role sees it. "Back to Suppliers" takes you back.



The scorecard, one row per supplier.

Every figure comes from the orders and receptions you logged in Orders. A supplier appears as soon as it has orders; until you log arrivals from them, their figures stay at "—" or "Not yet".

THE COLUMNS

Supplier	The name.
Receptions	How many of their arrivals you have logged: the sample size.
Real lead time	The observed range, from minimum to maximum (for example 8–14d), and below "8 in 10 within X d, 19 in 20 within Y d". "Inconclusive" if every delivery arrived the same day it was ordered.
Declared	The lead time on its record. "—" if nobody filled it in: the 15 days we assume are not a promise from the supplier.
Trend	+N d if its recent time left its own normal range (hover for the detail), Stable, or Not yet with a single reception.
% On time	Deliveries whose real time was at or below the declared one. Green from 70 %, amber from 40 %, red below. With few deliveries it carries "(provisional)".

Promises kept	Of the dates promised by the supplier that you accepted, how many were kept, and in brackets how many were measured. "—" if you never accepted one.
% Fill rate	What share of what you ordered arrived. "N on the way" while their deliveries are still inside the promised window; "(provisional)" with few deliveries.
Purchased value	What was received, at cost. "≥" if some lines have no cost; "—" if none has (it is not zero).
Last reception	The date of the latest arrival.

If any supplier drifted, above the table you read "N suppliers have drifted from their historical lead time", detected with a 3-sigma statistical control rule over each supplier’s own history.

> Stricter about accusing than adjusting
>
> 3 receptions are enough to learn a lead time, but the "Trend" column needs at least 6 (2 recent and 4 baseline) before it flags a supplier for running late. When one drifts, the Panel and Orders show "Suppliers taking longer than usual".

WHEN IT IS EMPTY

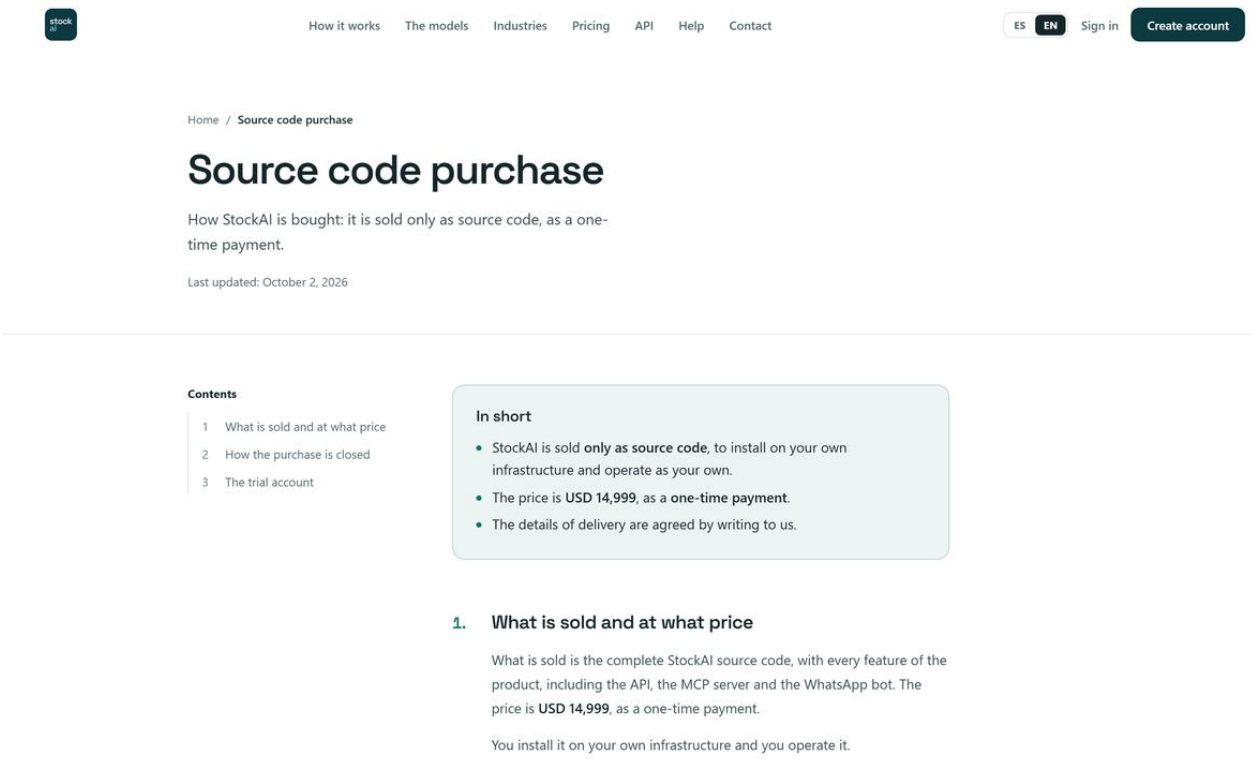
No receptions recorded yet	You have not logged any arrival yet. Do it from Orders.
You recorded arrivals, but with no supplier assigned	The arrivals were saved, but the products have no supplier: set it on each product and the scorecard fills up with the next arrivals.

On a phone each supplier is a card with the same figures and the notes that explain each one.

Commercial terms

The public page that explains how StockAI is bought: what is sold, how the purchase is closed and how the trial account works.

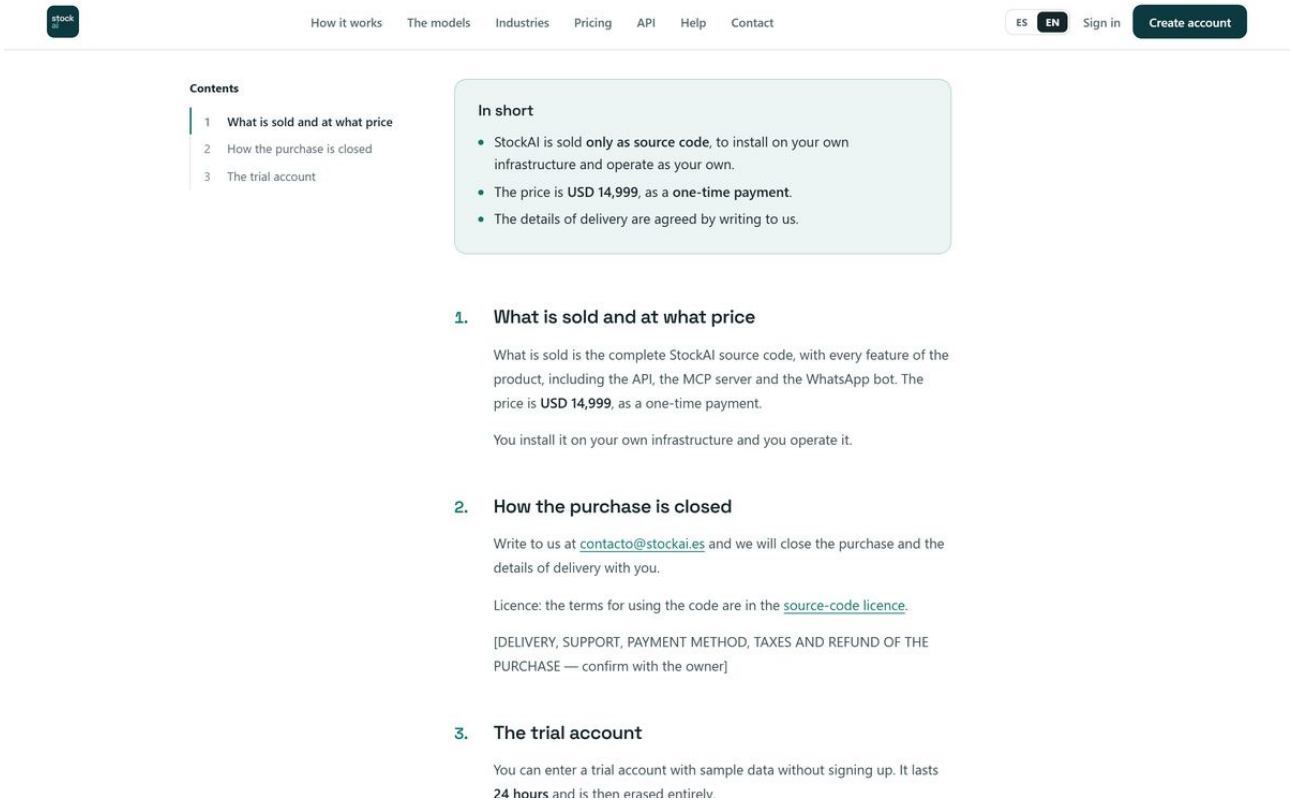
Commercial terms is a page of the website, not of the app: no sign-in is needed and it changes nothing in your account. You reach it from the site footer, in the legal documents group, and from Legal.



The top of the page.

THE PARTS OF THE PAGE

Breadcrumb	Home / the document. "Home" takes you to the home page.
Title, introduction and date	What the document is and when it was last updated.
Summary	The coloured box with the essentials in three points.
Contents	On the left (or folded at the top on a phone): each numbered section; click to jump to it.
Sections	What is sold and at what price, How the purchase is closed (with the contact email and the link to the source-code licence) and The trial account.
Other documents	At the end, links to the rest of the legal documents.



The summary and the sections.

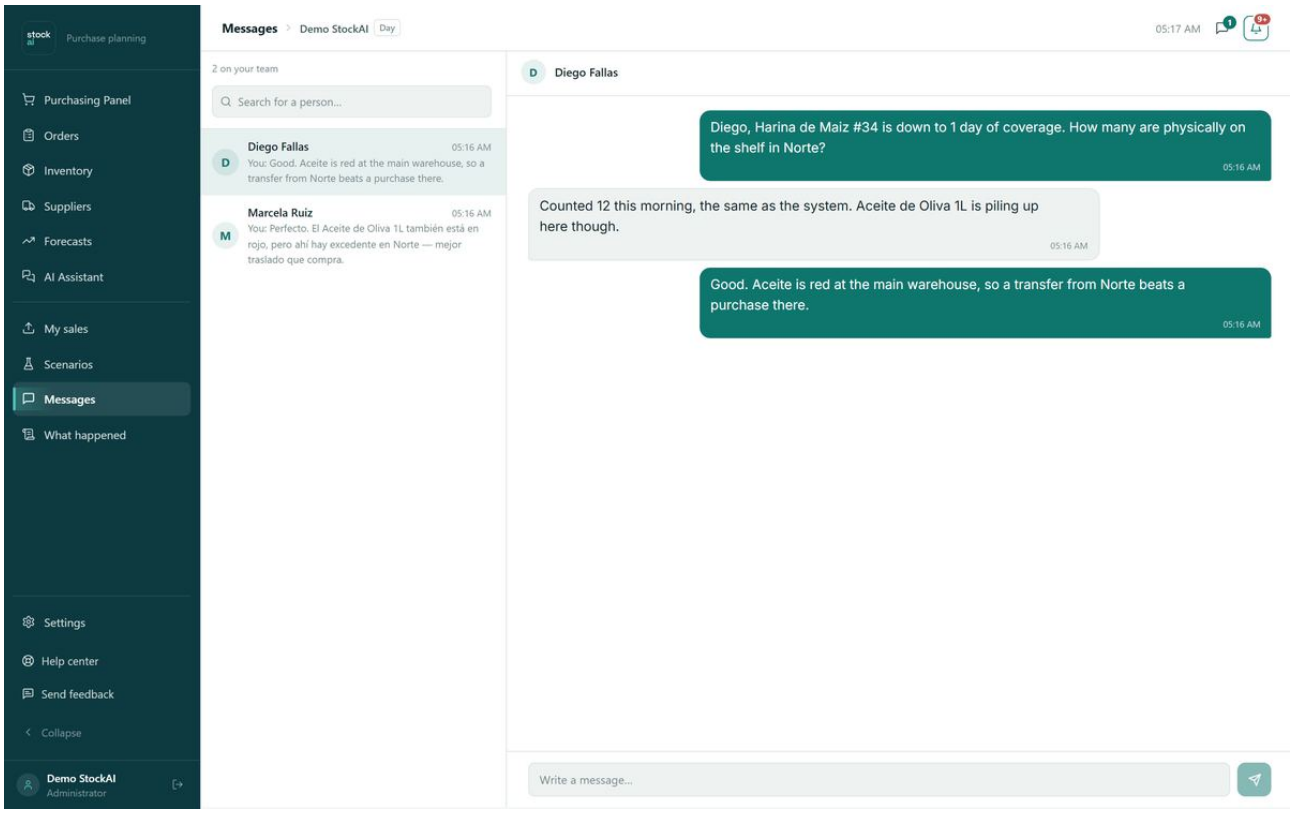
To try the app without signing up, see Try without signing up. What each plan includes inside the app is in Plan limits.

Messages, step by step

One-to-one conversations with the people on your team, inside StockAI, with an optional WhatsApp heads-up when you are away.

Messages is in the sidebar and behind the speech-bubble icon in the top bar, which shows how many messages you have unread. Use it to coordinate a purchase with a teammate without leaving the app.

> Who can use it
>
> Every role, viewers included: writing to a teammate changes no business data. You can only write to active users of your own company.



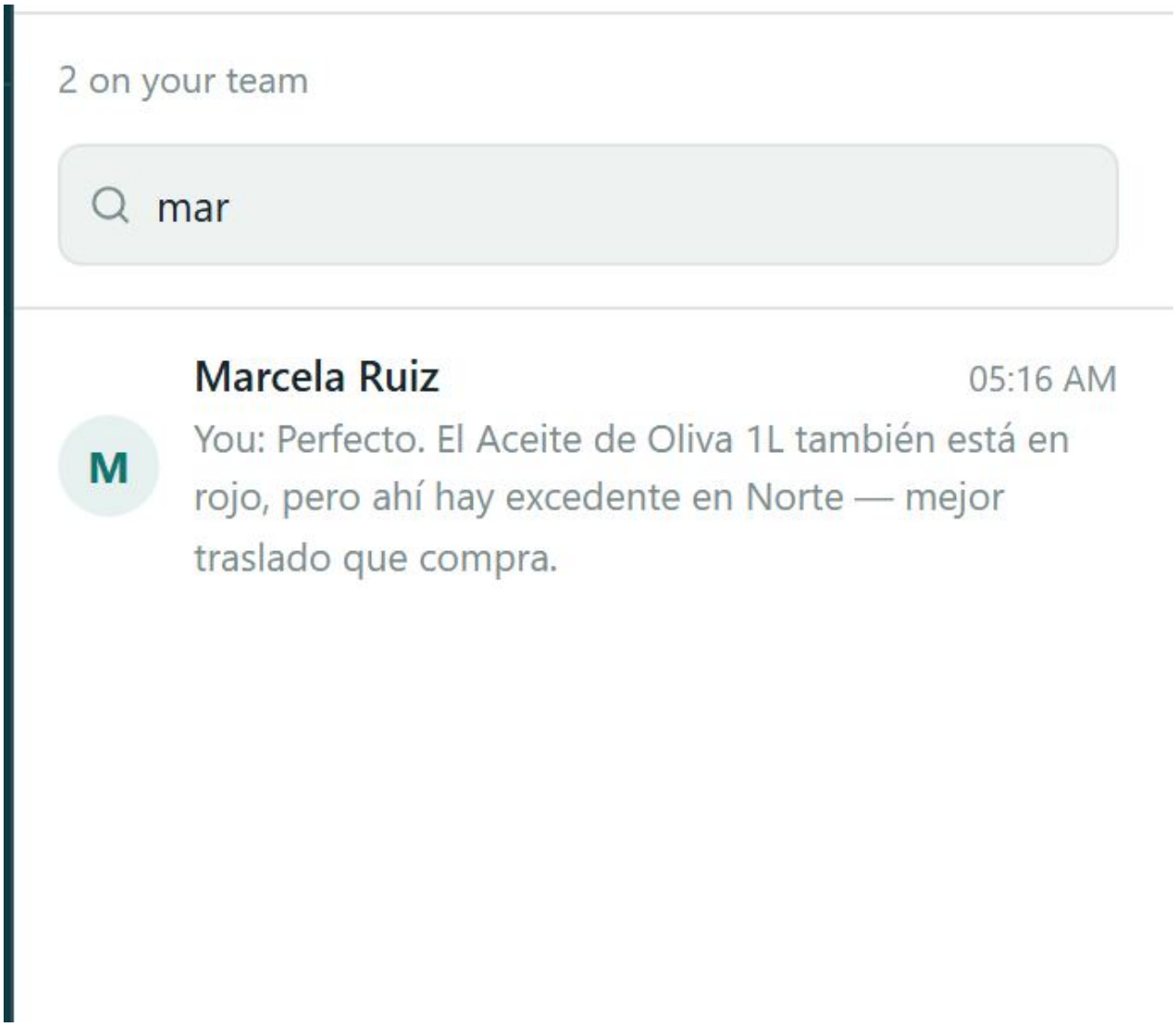
Messages with a conversation open.

THE CONVERSATION LIST

N on your team	How many people you can contact.
Search for a person…	Filters your conversations by name or email. While you search, "Write to them for the first time" lists teammates you have not talked to yet.
Each conversation	The initial, the name, the time of the last message (or the date if it is not today), the last message ("You:" if it is yours) and a circle with the unread count.

With no conversations you see "No conversations yet — Search for a teammate above to write to them". If nobody matches the search: "Nobody matches “…”".

WRITE TO SOMEONE



The search filters your conversations; people you have not talked to yet appear below, under "Write to them for the first time".

1. Type their name or email in "Search for a person...".
2. Click the person (in an existing conversation or under "Write to them for the first time").
3. The conversation opens on the right; a new one says "This is the start of the conversation".
4. Type in "Write a message..." (up to 4,000 characters) and press Enter or the send button.

Your messages sit on the right, in colour; the other person’s on the left. The conversation refreshes by itself every few seconds and the list every 15 seconds. Opening a conversation marks its messages as read.

When you open a conversation, what they sent you is marked as read and the counter disappears, the envelope’s too.

A HEADS-UP WHEN YOU ARE AWAY

In My account, "Team messages" has the "Get a heads-up when someone writes to you" switch. With it on and your WhatsApp linked, if someone writes while you are away from StockAI, we notify you on WhatsApp (or by SMS if WhatsApp is unavailable). It is not repeated while you already have messages from that person unread or read less than 10 minutes ago.

What it does not do

There are no group messages, attachments or message deletion. To talk to a supplier, use order sending in Orders.

Details worth knowing

The list refreshes by itself every 15 seconds and the open thread every 5, so a new message can take a few seconds to show. There is no "typing…" and no read receipt. Read-only users can also send and receive messages: the boundary is the company, not the role.

On a phone, the list and the conversation take the screen in turns; the arrow goes back to the list.

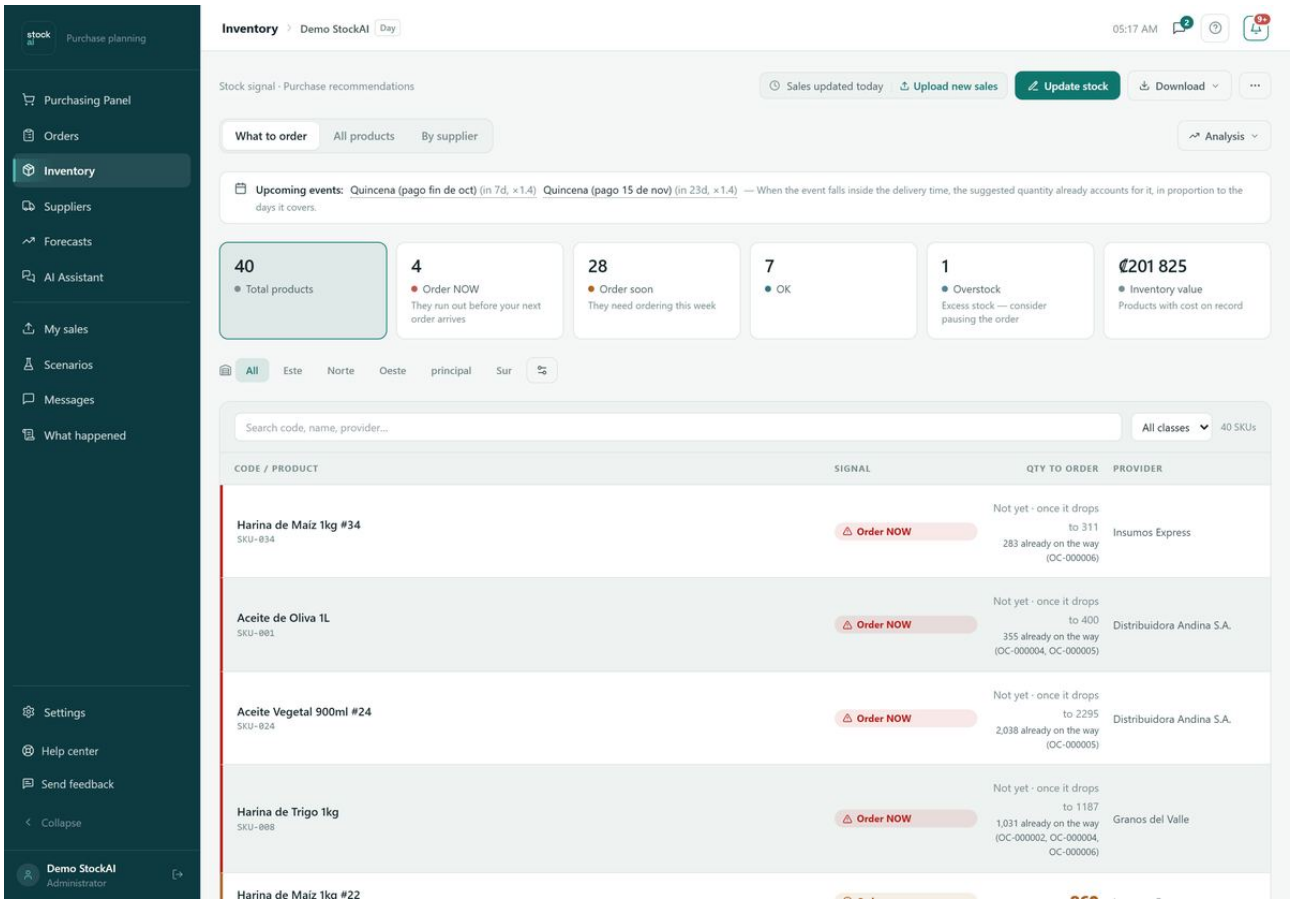
Inventory

Inventory, warehouses and transfers, stock count, inventory rules and stock sync.

Inventory

The stock signal screen: what to order, how much stock you hold and what it is worth, per product and per warehouse. From here you edit stock, log stock-outs, move goods between warehouses and open the money analyses.

Inventory puts the sales forecast next to your current stock and gives each product a colour: Order NOW, Order soon, OK, Overstock or No data. It is also where you keep stock up to date: by hand, from a file, per warehouse or with a physical count.



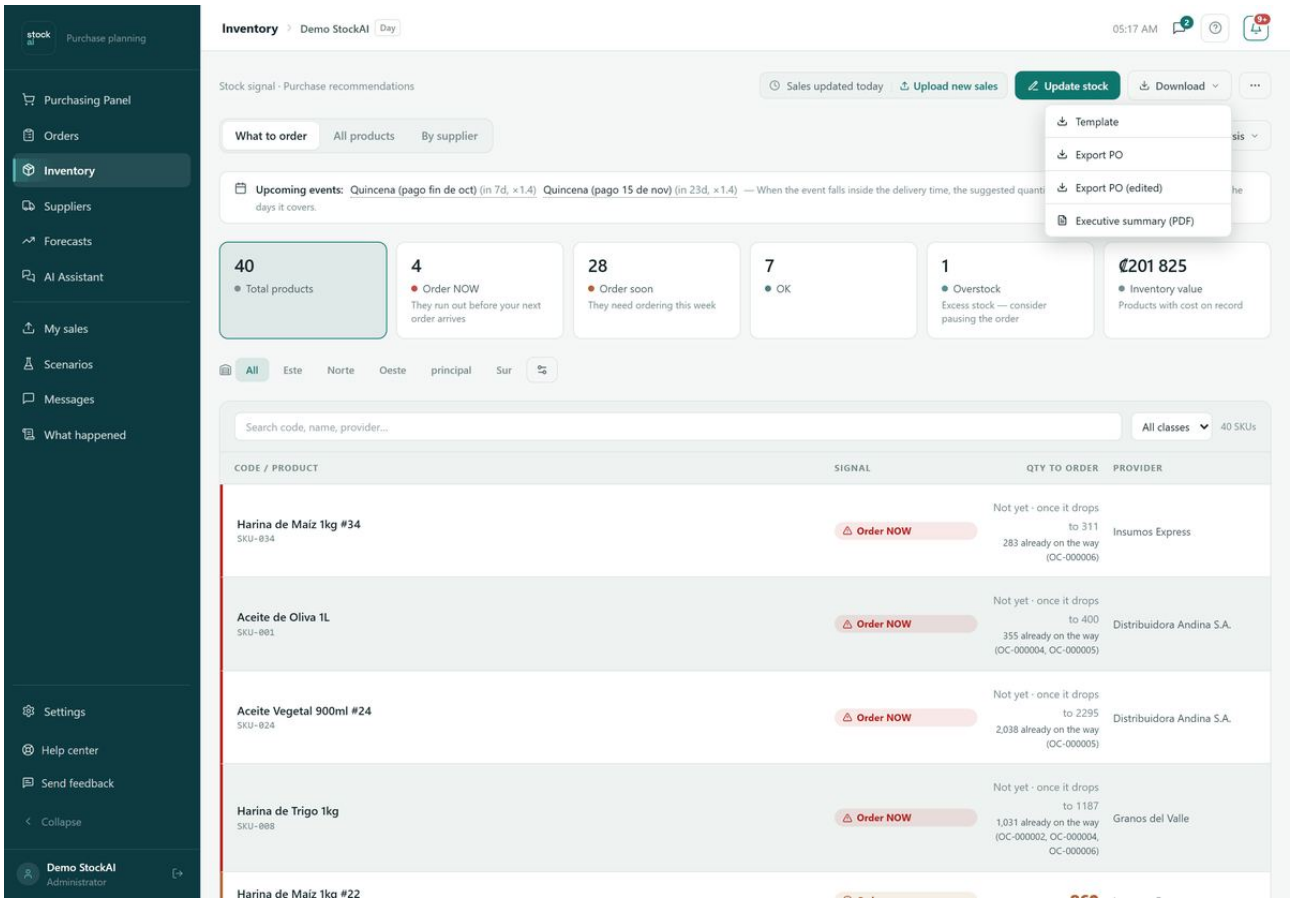
The “What to order” tab: summary cards on top, the products that need a decision first below.

> Who can do what
>
> Every user sees everything. Only an analyst or an administrator sees the “Update stock” button, imports files, logs stock-outs, opens the stock count and the sync, and creates warehouses and transfers. Approving, rejecting and reversing transfers, and assigning legal entities to warehouses, is for the administrator only. See Users and roles.

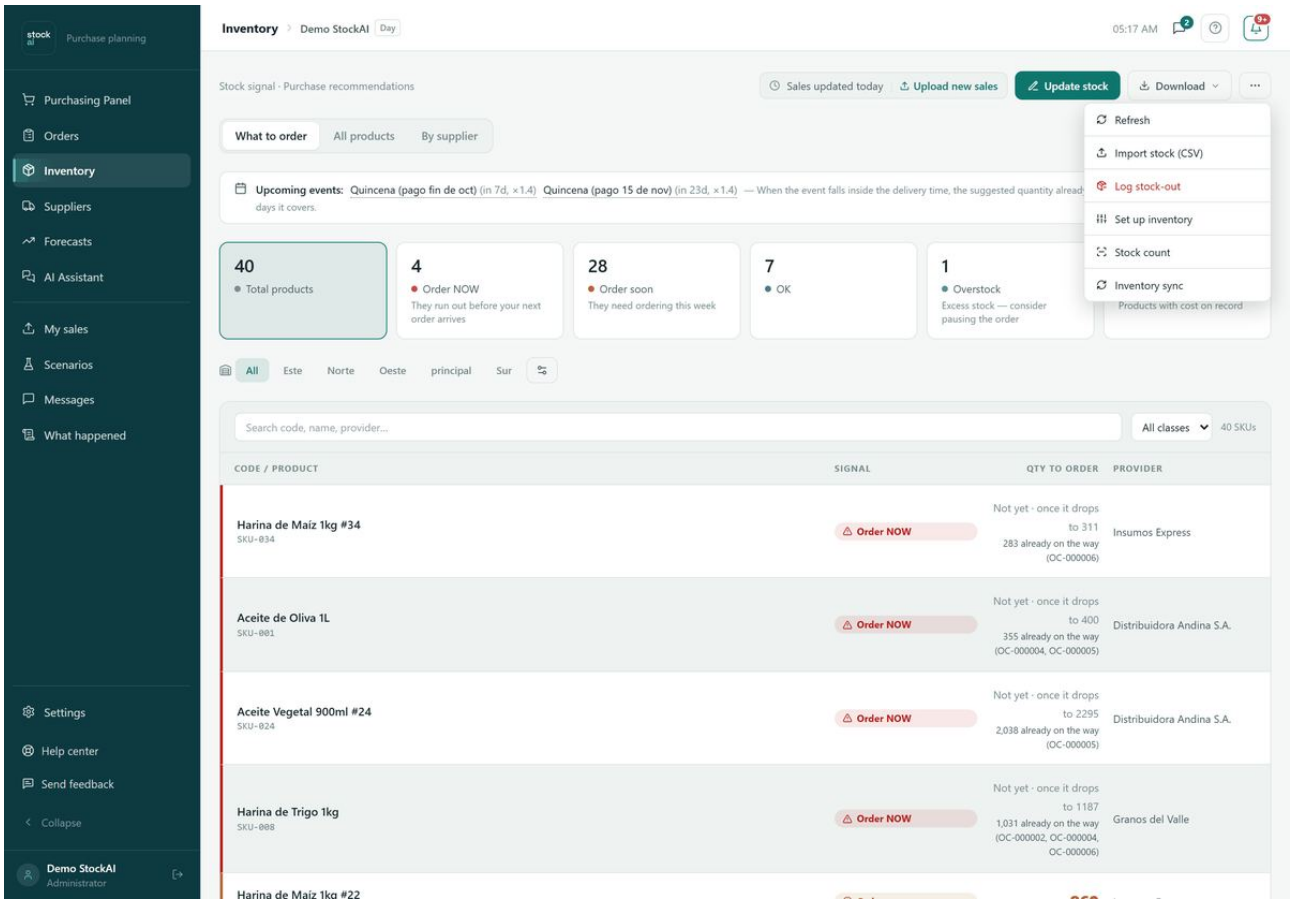
THE TOP BAR

On the left, on desktop, the line “Stock signal · Purchase recommendations”. On the right, from left to right:

Sales updated / No sales data yet	When the sales everything is computed from were loaded. “Upload new sales” takes you to My sales. If the sales are more than two weeks old, the warning says so.
Update stock	Main button (analyst or administrator only). Opens the quick stock editor: see Update stock.
Download	Menu with four options: Template (the empty CSV with the columns we recognise), Export PO (the purchase order the server works out), Export PO (edited) (the order with the quantities you changed by hand) and Executive summary (PDF). The last three need a finished forecast.
Data as of … / Refresh now	Only shown when you have an inventory sync. It says how current the stock is (green up to date, amber out of date, red stopped) and lets you ask your system for an immediate refresh. While it runs, the table keeps showing the last good data.
… (More actions)	Refresh (reloads the screen), Import stock (CSV) and Log stock-out (analyst or administrator), Set up inventory (opens Set up inventory), Stock count and Inventory sync (analyst or administrator).



The “Download” menu.



The "…" (More actions) menu as an administrator sees it.

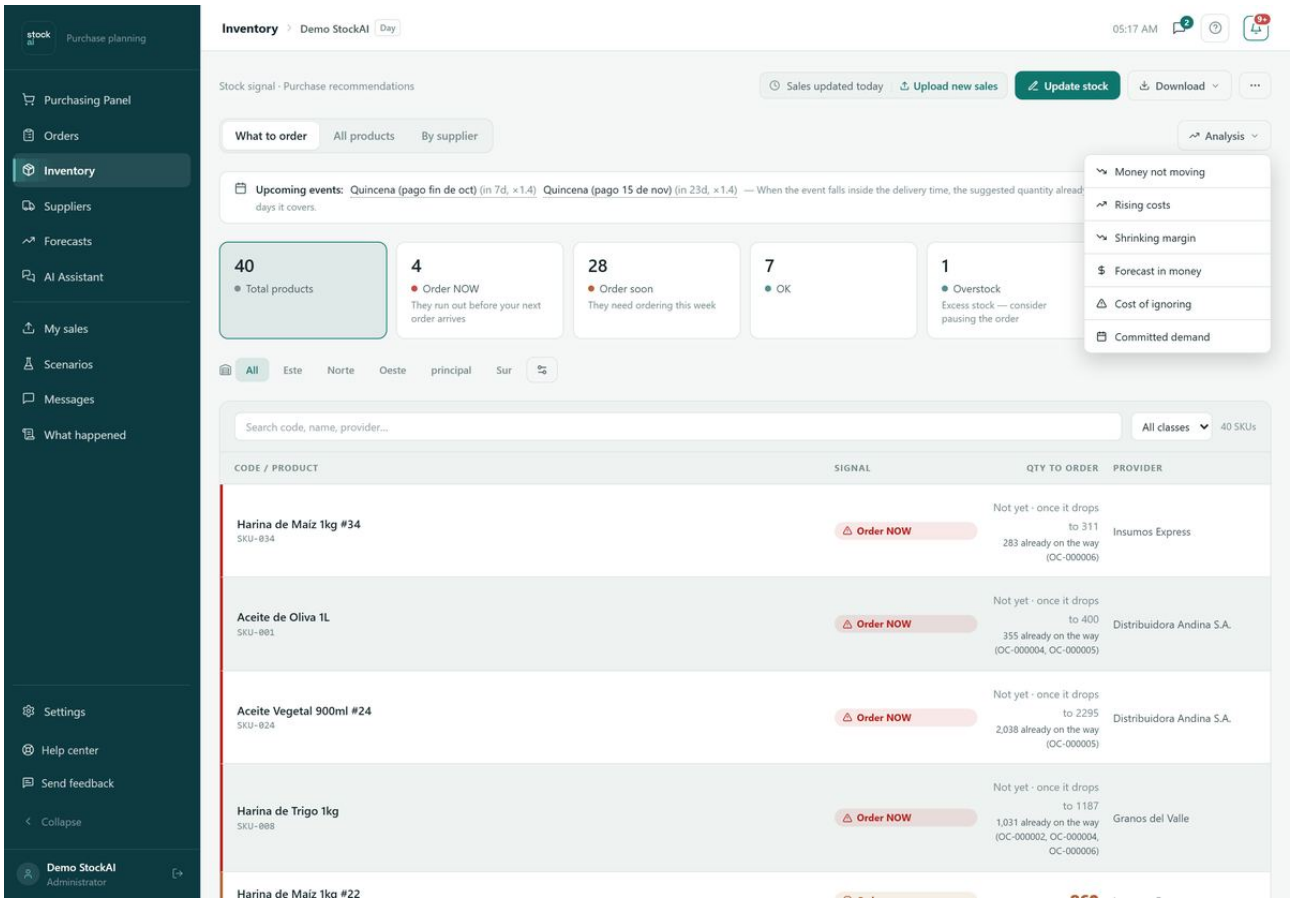
> Export PO saves an order
>
> "Export PO" and "Export PO (edited)" do not only download a file: they record the order in Orders, and from then on those units count as in transit. If the file downloads but the order could not be saved, you see "File downloaded, order not saved": generate it again. "Export PO (edited)" includes every urgent and soon product in the catalogue, not only the page on screen, and records the ones you set to zero as rejected. With a warehouse selected, both export that warehouse only.

THE THREE TABS AND THE ANALYSIS MENU

Below the bar you choose how to look at your stock. The three tabs use the same data; the order and the columns change.

What to order	The simple view. Four columns: Code / Product, Signal, Qty to order and Provider. Products that need a decision come first (Order NOW and Order soon, with a coloured edge on the left). When part of what is needed is already on its way, the quantity says how much and from where.
All products	The full table, sortable by column: see The full table.
By supplier	The same products grouped by supplier, with each one's quantity to order, to put together an order per supplier. With several pages, each group shows only the products on the current page.

Analysis	A menu with six money and commitment views: Money not moving, Rising costs, Shrinking margin, Forecast in money, Cost of ignoring and Committed demand. Opening one replaces the tabs with “Back to inventory” and the view's name.



The “Analysis” menu.

THE SUMMARY CARDS AND THE FILTERS

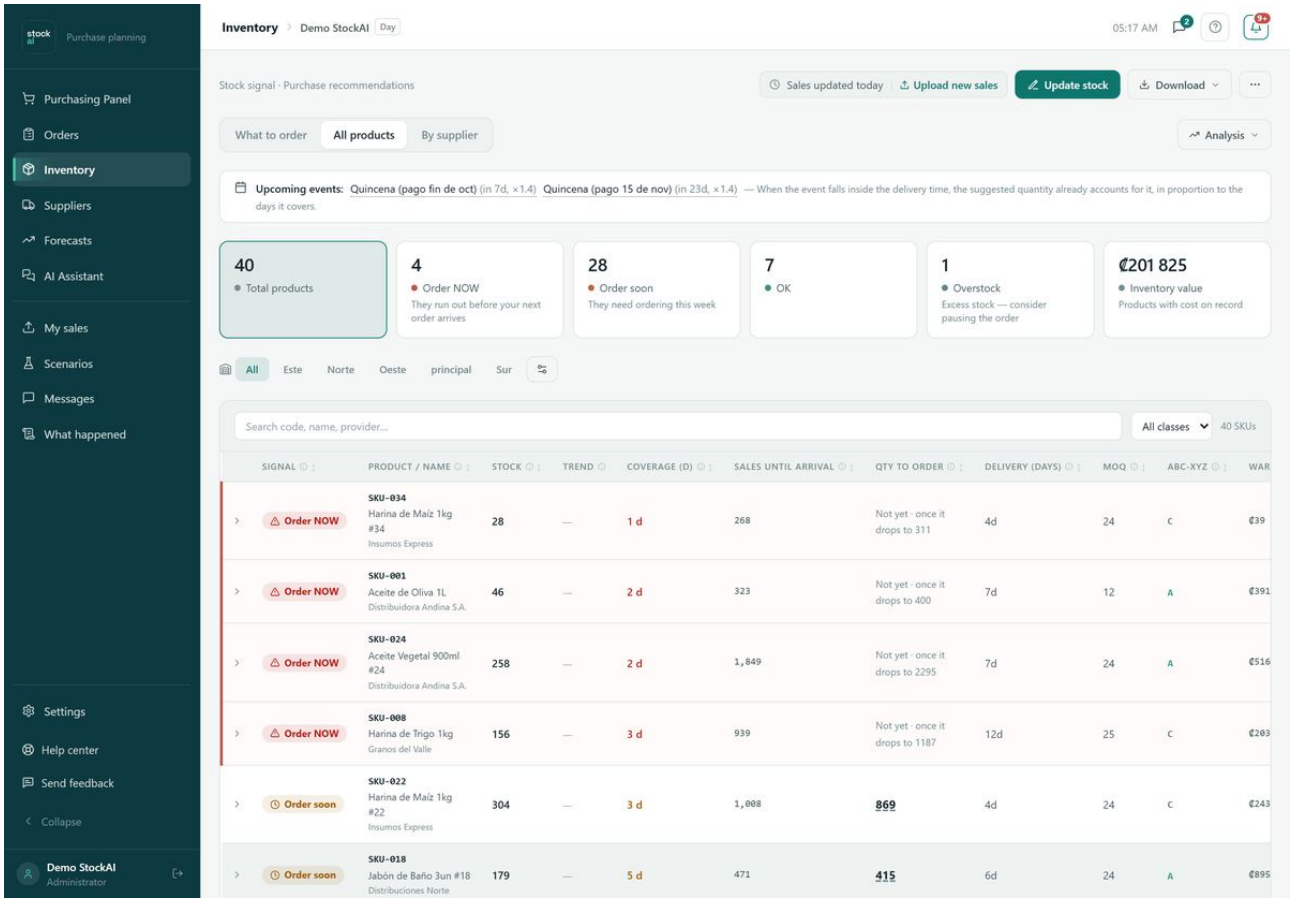
The six cards summarise the whole catalogue, not just the page you see. Click a signal card to filter the list; click again to clear it.

Total products	How many products there are. A click clears the signal filter.
Order NOW	“They run out before your next order arrives”.
Order soon	“They need ordering this week”.
OK	Healthy stock.
Overstock	“Excess stock — consider pausing the order”.
Inventory value	Stock times unit cost, summed, for the products with a cost on record only. With no cost at all it shows “—”: the value is unknown, not zero.

Under the cards is the search bar: “Search code, name, provider…” (the X clears it), the “All classes / Class A / Class B / Class C” selector that filters by ABC class (how much money the product moves) and the count of products that pass the filter. When nothing matches you see “No product matches the filter” and the “Clear filters” button.

Notices can appear above the cards: products you uploaded that were left out of the forecast (with the reason, such as too little history), “Upcoming events:” with each season and its multiplier (a click opens its simulation), and how many forecast products have no stock on record.

THE FULL TABLE (ALL PRODUCTS)



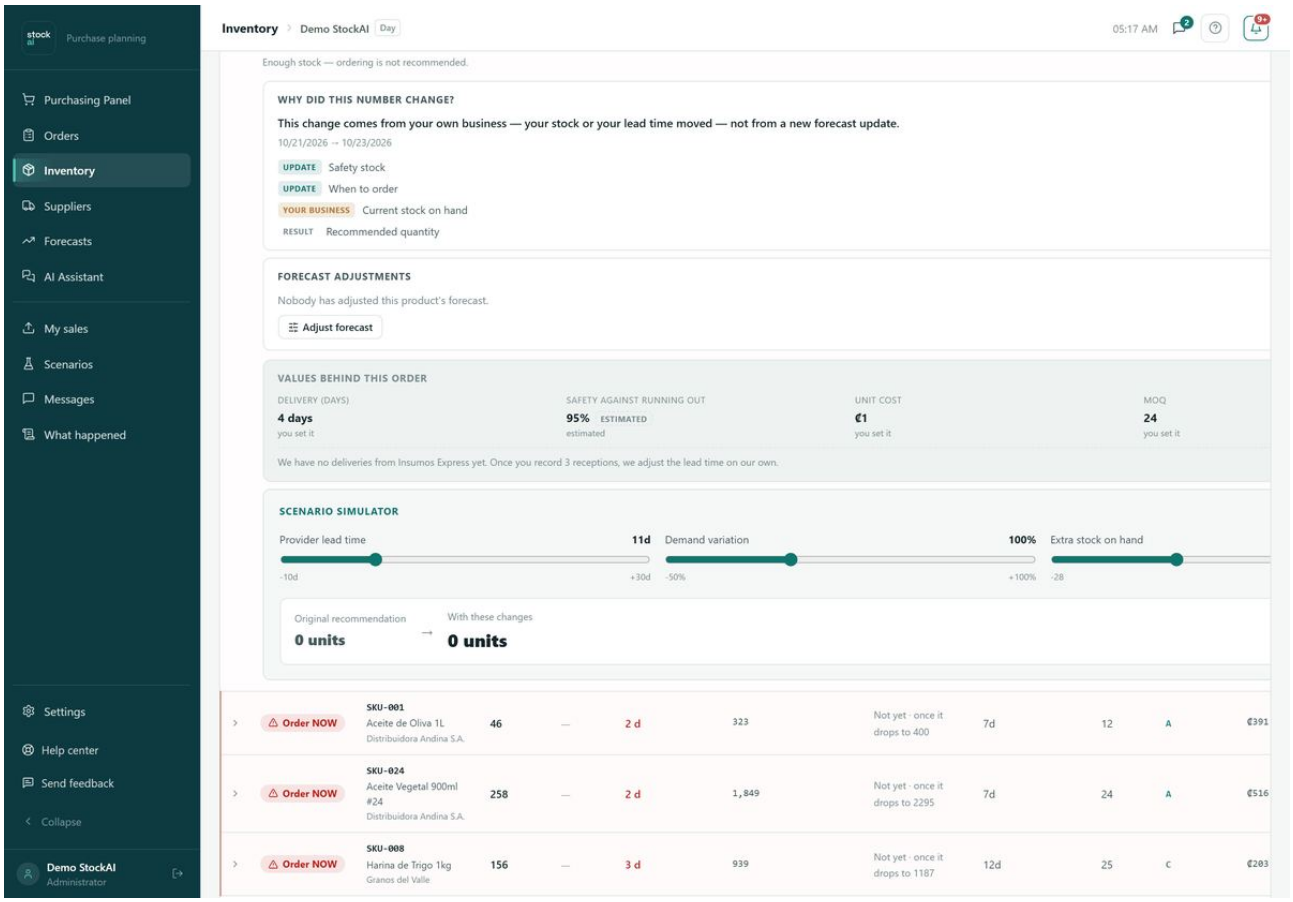
“All products”: click a header to sort; hover to see what it means.

▶ (See how this was calculated)	Opens the calculation breakdown under the row: see A row's breakdown.
Signal	The product's stock signal colour. See The stock signal.
Product / Name	The code, the name, the supplier and, with several warehouses, how much each one holds. It may carry a tag: forecast by analogy (a new product using other products' forecast) or “From customer commitments” (the need comes from committed orders only).
Stock	Units on hand today. “No record” if it was never loaded.
Trend	How your stock moved in the last 14 days (red falling, green stable or rising).
Coverage	How many days (or weeks or months, depending on your granularity) your current stock lasts.
Sales until arrival	How much you expect to sell while the order travels.

Qty to order	What you should order today. Click the number to type another quantity (it gets a coloured underline); that is the quantity “Export PO (edited)” uses. “Not yet” means it is not needed yet, sometimes with the stock level it waits for.
Delivery (days)	The lead time used. A tag says where it came from: yours, learned from real deliveries, from a supplier rule, or assumed (15 days).
MOQ	The supplier's minimum order. We never recommend less.
ABC-XYZ	A/B/C is how much money it moves; X/Y/Z how predictable its sales are. AZ is the trickiest.
Warehouse value	Stock times unit cost. Only when you recorded the cost.
Actions	Simulate scenarios (the sliders icon, opens the breakdown with the simulator), Edit (pencil) and Delete (bin, only when the product has a stock record).

A row's breakdown

Opening ▶ shows, in the order of the calculation: coverage, forecast daily demand, lead time, safety buffer, reorder point and why the suggested quantity is what it is (minimum order included). Below come “Why did this number change?” (what changed since the previous day, and whether it came from a forecast update or from your business), the manual forecast adjustment, the planning values with their origin and the “Scenario simulator”: move the lead time, the demand variation and the extra stock on hand to compare the “Original recommendation” with “With these changes”. The simulator saves nothing.

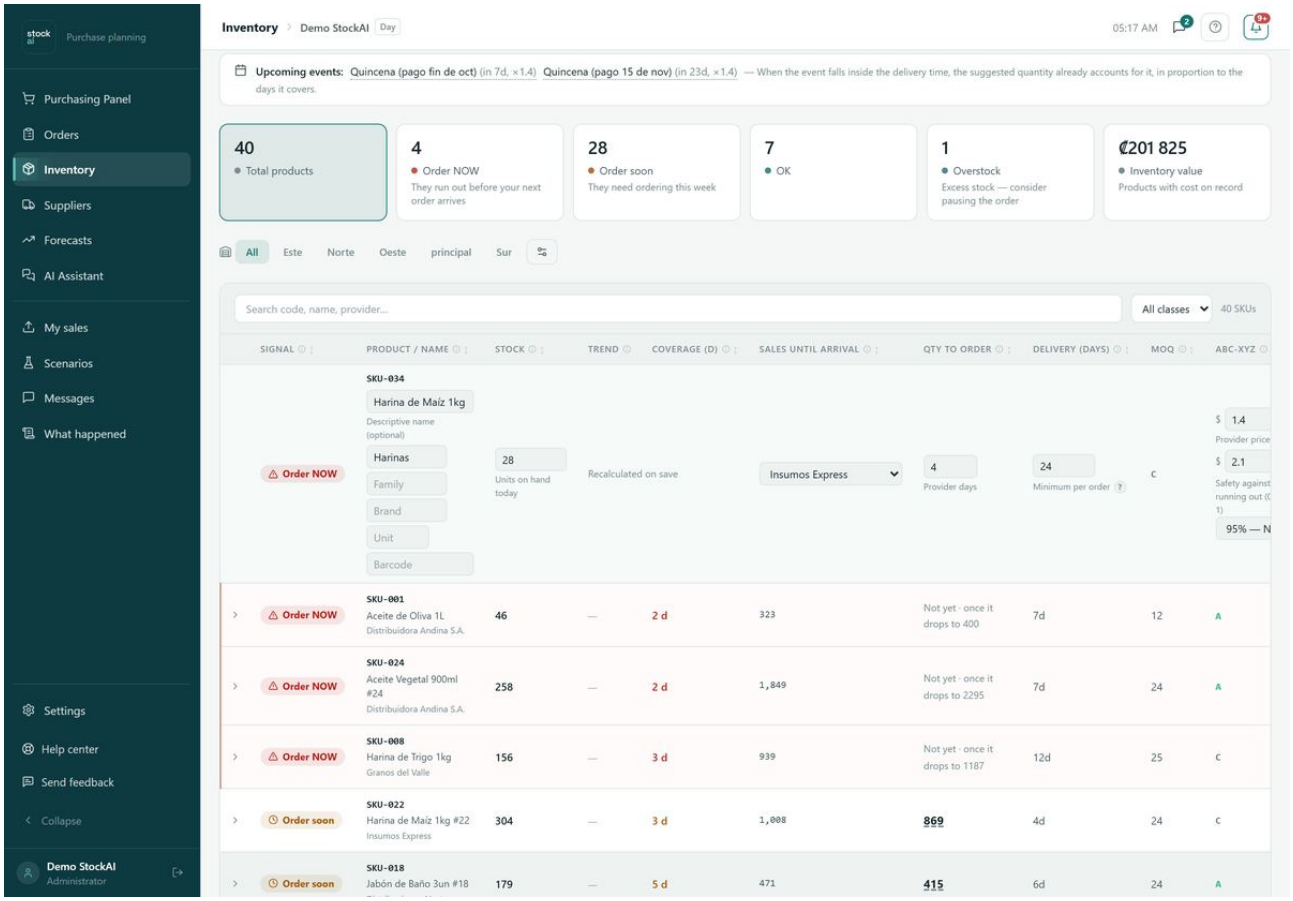


A row's breakdown, with the simulator at the bottom.

To understand the pieces of the calculation, read Reorder point, Safety stock and In transit.

Editing a product by hand

1. In “All products”, press the row's pencil (Edit). The row turns into a form.
2. Change what you need: Display name, Category, Family, Brand, Unit, Barcode, Current stock (units on hand today), Provider (your supplier list or “— No provider —”), Delivery days (1 to 365), Minimum per order, Provider price / unit, Sale price and Safety against running out: 90% Low, 95% Normal, 97% High or 99% Maximum.
3. Press Save. Signal, coverage and quantity to order are recalculated on save. The X cancels without saving.



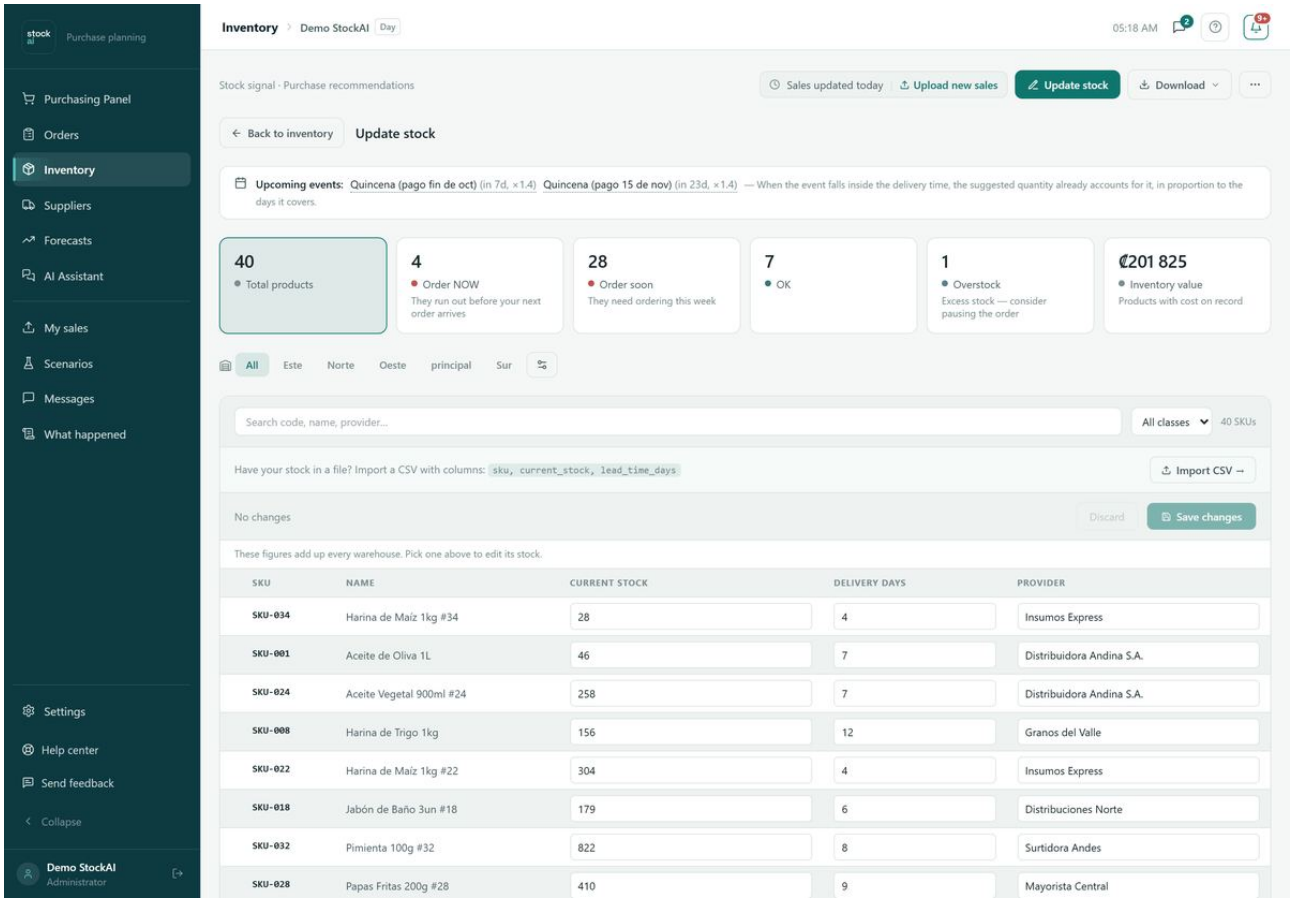
A row in edit mode.

> What you leave alone is respected
>
> The form arrives filled with the values in use, learned or assumed ones included. If you do not change the delivery days or the minimum order, they are not stored as yours: they keep coming from the supplier rule or from learning.

> Delete cannot be undone
>
> The bin opens “Delete the inventory record for …?”. Confirming with “Yes, delete” deletes that product's stock record and cannot be undone. The product stays in the forecast but goes back to “No data” until you load its stock again.

UPDATE STOCK (THE QUICK EDITOR)

The fastest way to bring many rows up to date. Only analysts and administrators see it.



“Update stock”: one row per product, three editable fields.

1. Press “Update stock” at the top right.
2. Type in Current stock, Delivery days or Provider on any row. An amber dot marks rows with unsaved changes and the bar counts how many rows you modified.
3. Enter saves that row and moves to the next; Esc discards that row's changes.
4. To save everything at once press “Save N changes”. Discard puts every row back. With several pages, what you changed on other pages is kept and saved too.
5. Press “Back to inventory” to leave.

Above the editor is “Have your stock in a file? Import a CSV with columns: sku, current_stock, lead_time_days” with the “Import CSV →” button.

> With several warehouses, pick one
>
> With two or more warehouses and the “All” tab selected, the figures add up every warehouse and the fields are locked (“These figures add up every warehouse. Pick one above to edit its stock”). Editing a sum has no correct destination: pick the warehouse in the selector and edit there.

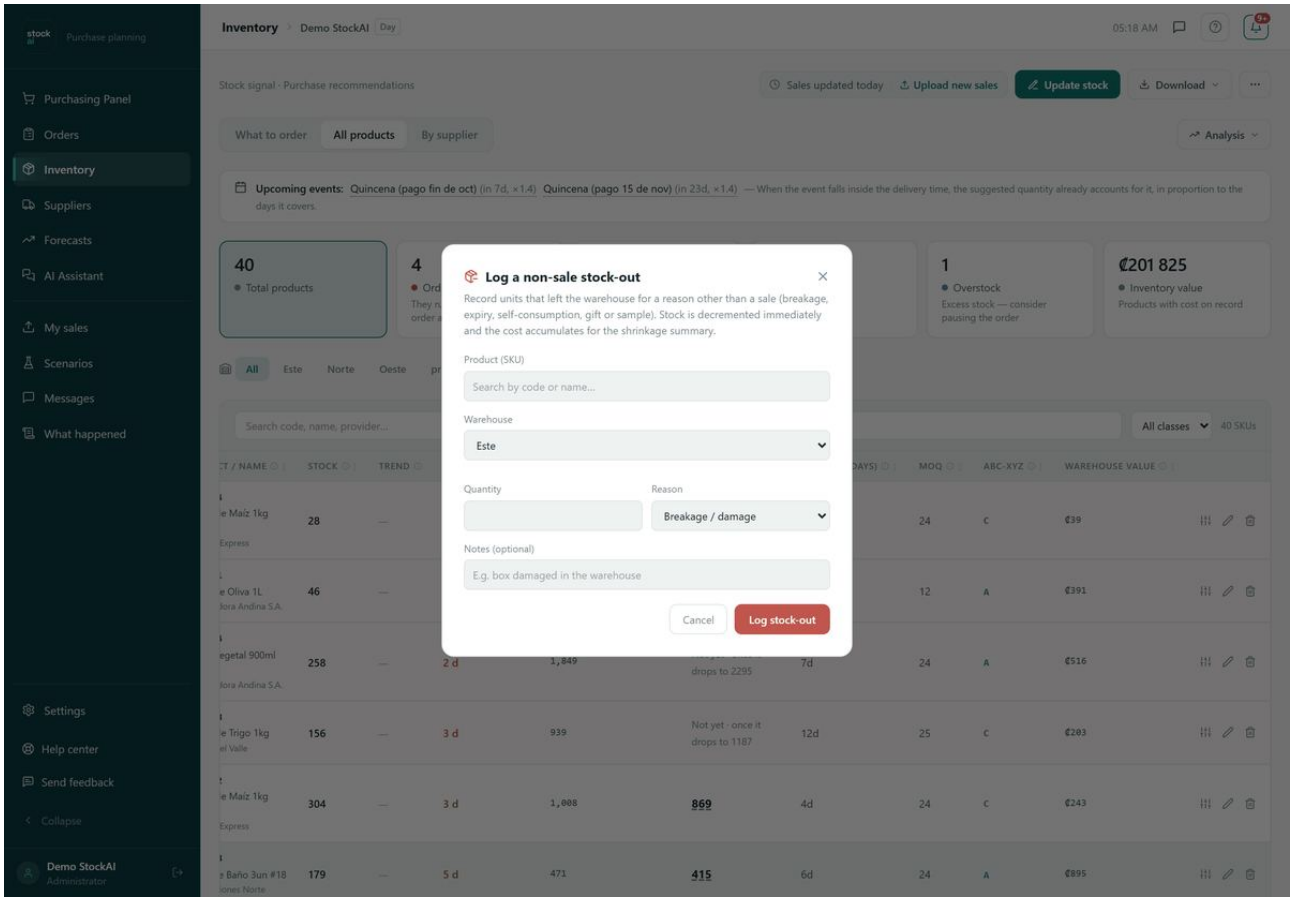
Importing stock from a CSV

“Import stock (CSV)” (in the … menu) and “Import CSV →” open the file picker. The file needs the `sku` column; we also recognise `current_stock`, `lead_time_days`, `unit_cost`, `sale_price`, `moq`, `supplier`, `warehouse` and others (download the Template from the Download menu). Rows with no warehouse column land in the warehouse you have selected, or in the main one on “All”. When it finishes you see “Inventory imported: Imported N of M SKUs”. If a sync owns some of those

values, before importing you are told “A sync will replace some of these values” and can press “Import anyway”. To map columns with other names, use the wizard in Set up inventory.

LOGGING A STOCK-OUT (SHRINKAGE)

For units that left without being sold: breakage, expiry, self-consumption, gift or sample. Stock is decremented immediately and the cost accumulates in the shrinkage summary.

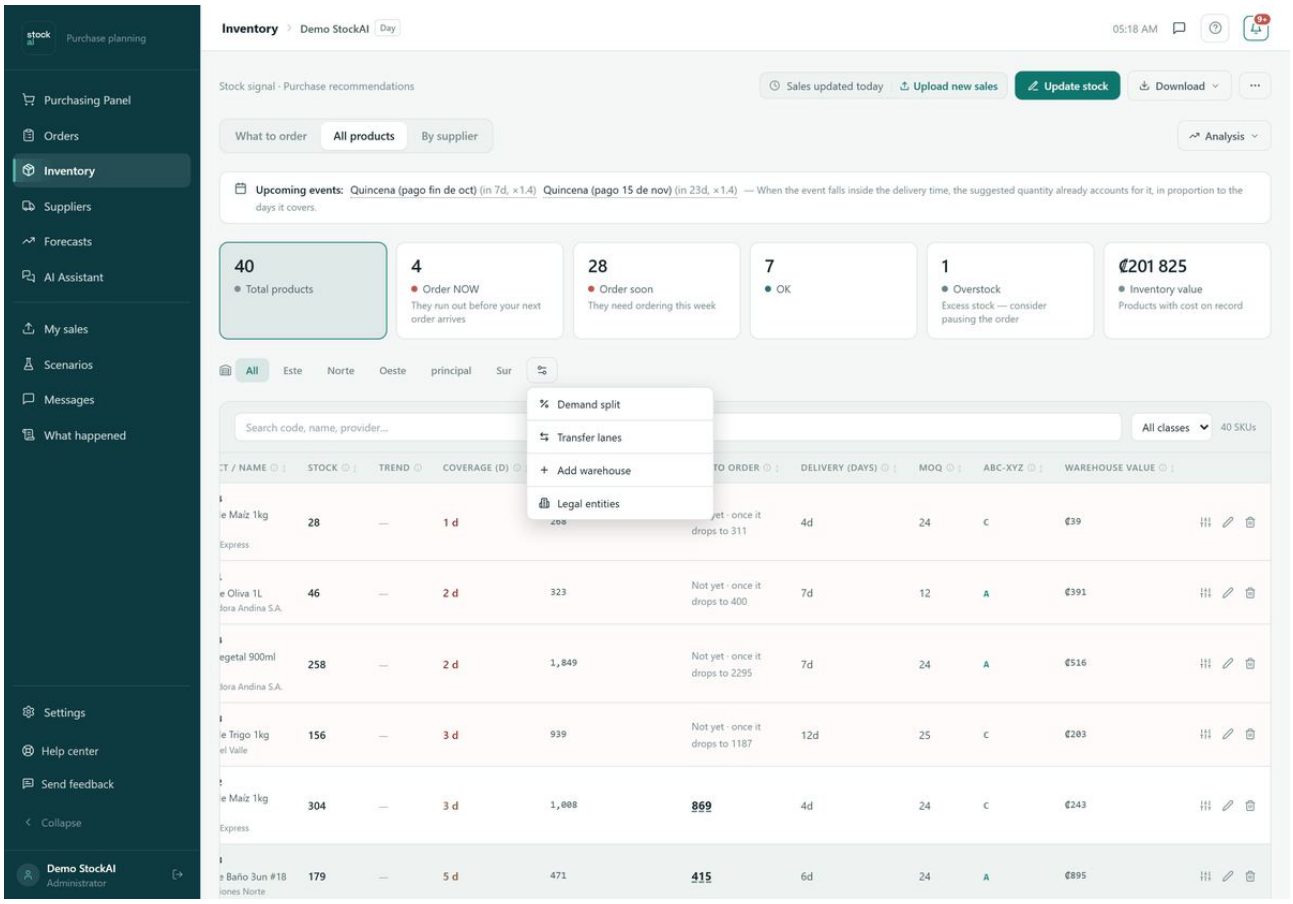


“Log a non-sale stock-out”.

1. Open the … menu and choose “Log stock-out”.
2. In Product (SKU) search by code or name and pick one. Below you see its Current stock and the Estimated cost of the stock-out.
3. With several warehouses, choose the Warehouse. It starts on the warehouse you have open; on “All” it starts on the first one in the list, which is not always the main one: check it before logging.
4. Type the Quantity (greater than 0) and the Reason: Breakage / damage, Expiry, Self-consumption or Gift / sample. Notes are optional.
5. Press “Log stock-out”. You see “Stock-out logged”.

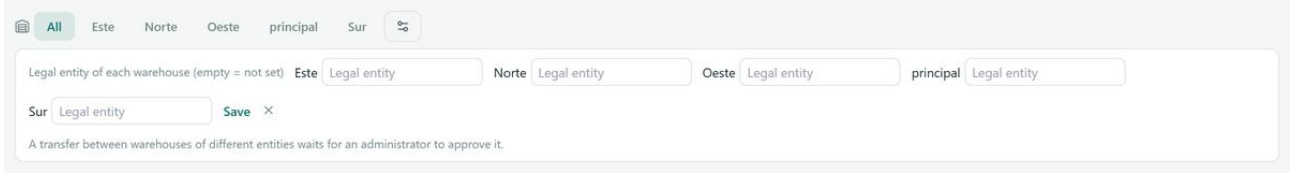
WAREHOUSES: THE SELECTOR AND ITS SETUP

With a single warehouse you only see the discreet “+ Add warehouse” link. With two or more the selector appears: “All” and one tab per warehouse, and next to it the gear icon “Warehouse setup” (analyst or administrator).

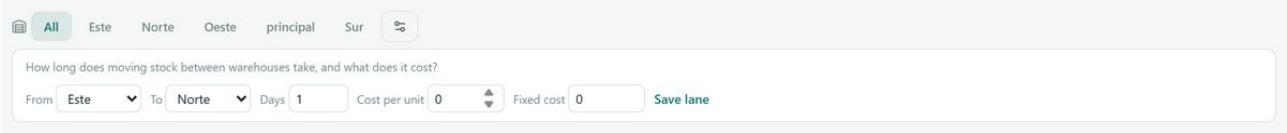


The warehouse selector with the “Warehouse setup” menu open.

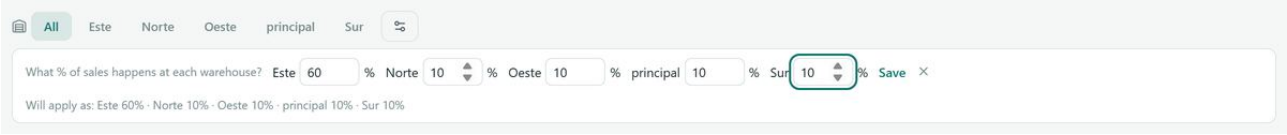
Demand split	“What % of sales happens at each warehouse?”. Type a percentage per warehouse and press Save. The numbers need not add up to 100: demand is split in proportion. Careful: a blank warehouse gets zero demand and drops out of planning, and the screen warns you in red before saving (“Will apply as: …”). With no split at all, all demand goes to the main warehouse.
Transfer lanes	How long moving stock between two warehouses takes and what it costs: From, To, Days, Cost per unit and Fixed cost, then “Save lane”. The X deletes a lane. With no lanes, StockAI assumes 1 day and zero cost. StockAI uses lanes to decide whether a transfer beats a purchase.
Add warehouse	Type the Warehouse name and press Save (or Enter). Your plan limits how many warehouses you can have. A warehouse cannot be deleted.
Legal entities	Administrator only. “Legal entity of each warehouse (empty = not set)”. Type each warehouse's legal entity and press Save. A transfer between warehouses of different entities waits for an administrator to approve it; if either warehouse has no entity, the transfer is sent at once as always.



“Legal entities”: one legal entity per warehouse.



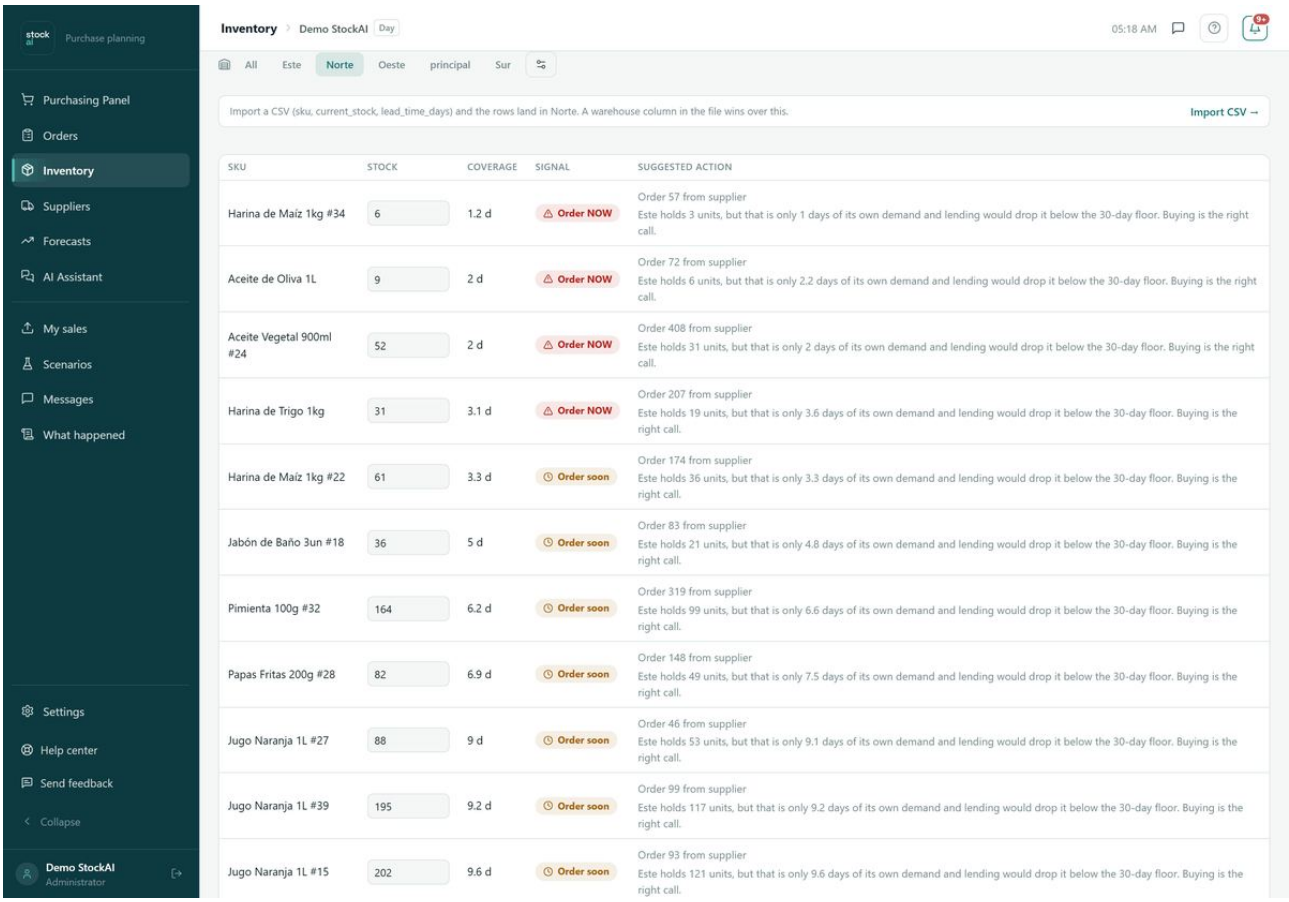
“Transfer lanes”.



“Demand split” showing how it will apply.

One warehouse's view

Picking a warehouse replaces the table with that warehouse's stock signal: SKU, Stock (editable), Coverage, Signal and Suggested action. On top, “Import a CSV (sku, current_stock, lead_time_days) and the rows land in …” with “Import CSV →”: rows with no warehouse column land in the open warehouse.



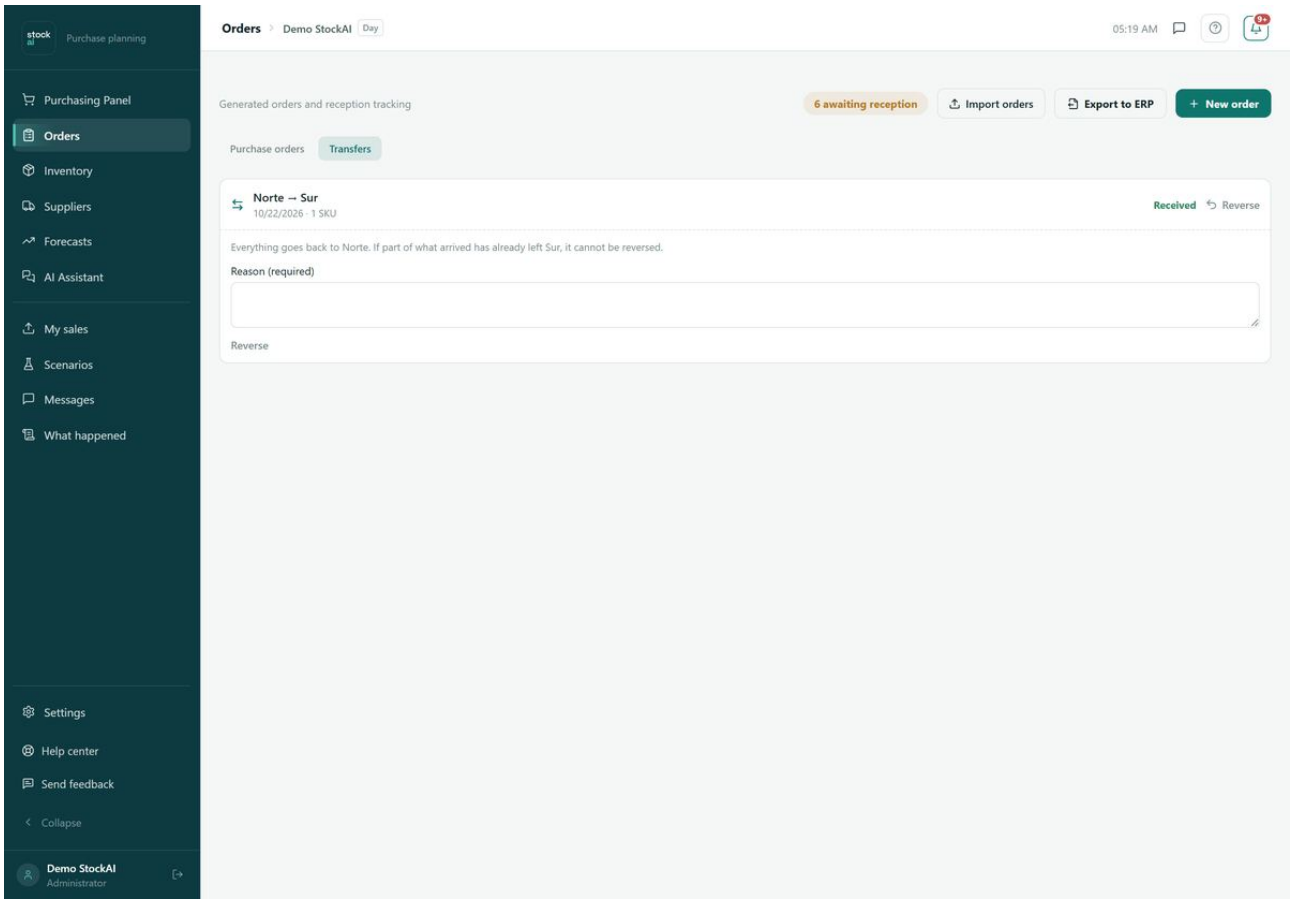
One warehouse's view with its suggested actions.

Stock	Type that warehouse's quantity and press Enter (or leave the field) to save; Esc discards. The value is stored in that warehouse, not across the network.
“No data” signal with a note	“Stock for this product was never recorded in this warehouse. That is not the same as zero: we do not know.” Load its stock so it gets a signal.
Transfer N from X	Another warehouse has spare stock and moving it beats buying. One click creates the transfer and the button turns into “Transfer created”.

Order N from supplier	Buying is better. Below may come why the transfer lost (slower, more expensive, would leave the other warehouse short).
Move N from X and buy the other M	The other warehouse can only spare part of it. One click creates that transfer; the purchase shrinks on its own because what is in transit is netted out.

TRANSFERS BETWEEN WAREHOUSES

A transfer is born in a warehouse's view (or in the Purchasing panel) and is followed in Orders, “Transfers” tab (shown only with two or more warehouses). Each card shows origin → destination, the date, how many SKUs, the expected arrival and the status.



The “Transfers” tab in Orders.

Status	What it means	What you can do
Awaiting approval	It crosses two legal entities. No stock has moved yet.	Administrator: Approve (stock leaves the origin now) or Reject. Anyone with write access: cancel (X).
In transit	The stock left the origin and counts in no warehouse.	Record arrival (“Everything arrived” or “Record quantities”). If nothing has arrived: cancel (X), and stock goes back to the origin.
Partial	Part of it arrived.	Record arrival for the rest, Close with loss or, as an administrator, Reverse.

Status	What it means	What you can do
Received	Everything arrived.	Administrator: Reverse.
Closed with loss	The missing units became shrinkage (“Transfer loss”). Stock does not change: those units had already left.	Nothing.
Cancelled / Rejected / Reversed	Finished. A reversed one shows its reason.	Nothing.

1. If the two warehouses have different legal entities, the transfer waits as “Awaiting approval”. An administrator opens Orders › Transfers and presses Approve: the system checks again that the stock is there and takes it out of the origin at that moment. If it was sold meanwhile, the approval is refused and the transfer stays pending.
2. When the goods arrive, press Record arrival. “Everything arrived” receives what is outstanding; “Record quantities” receives what you type on each line (“Outstanding: N”). Partial arrivals add up.
3. If what is missing was lost, press “Close with loss”: the outstanding units become shrinkage and the transfer closes.
4. To undo a received or partial transfer, an administrator presses Reverse, writes the Reason (required) (up to 500 characters) and confirms. Everything goes back to the origin: what was received leaves the destination and what was still on the road comes home.

> When it cannot be reversed
>
> If part of what arrived has already left the destination (sold or moved), the whole reversal is refused and nothing changes. A reversed transfer cannot be received or reversed again: it stays in the history with who, when and why. Nothing is deleted.

TRANSFER SUGGESTIONS

On the Purchasing Panel, before the purchases, you see how many products can be solved by moving stock instead of buying: another warehouse has a surplus of them. Each line says how much to move, from where to where and how much coverage the origin keeps. In Inventory, when looking at one warehouse, the row can offer to transfer N from another warehouse, or to move N and buy the rest.

1. Press "Create transfer" on the suggestion.
2. The transfer starts In transit: the origin warehouse loses the units at that moment.
3. The units count as on the way for the destination warehouse (not the origin), so its signal does not ask for them again.
4. When they arrive, record the arrival in Orders, "Transfers" tab.

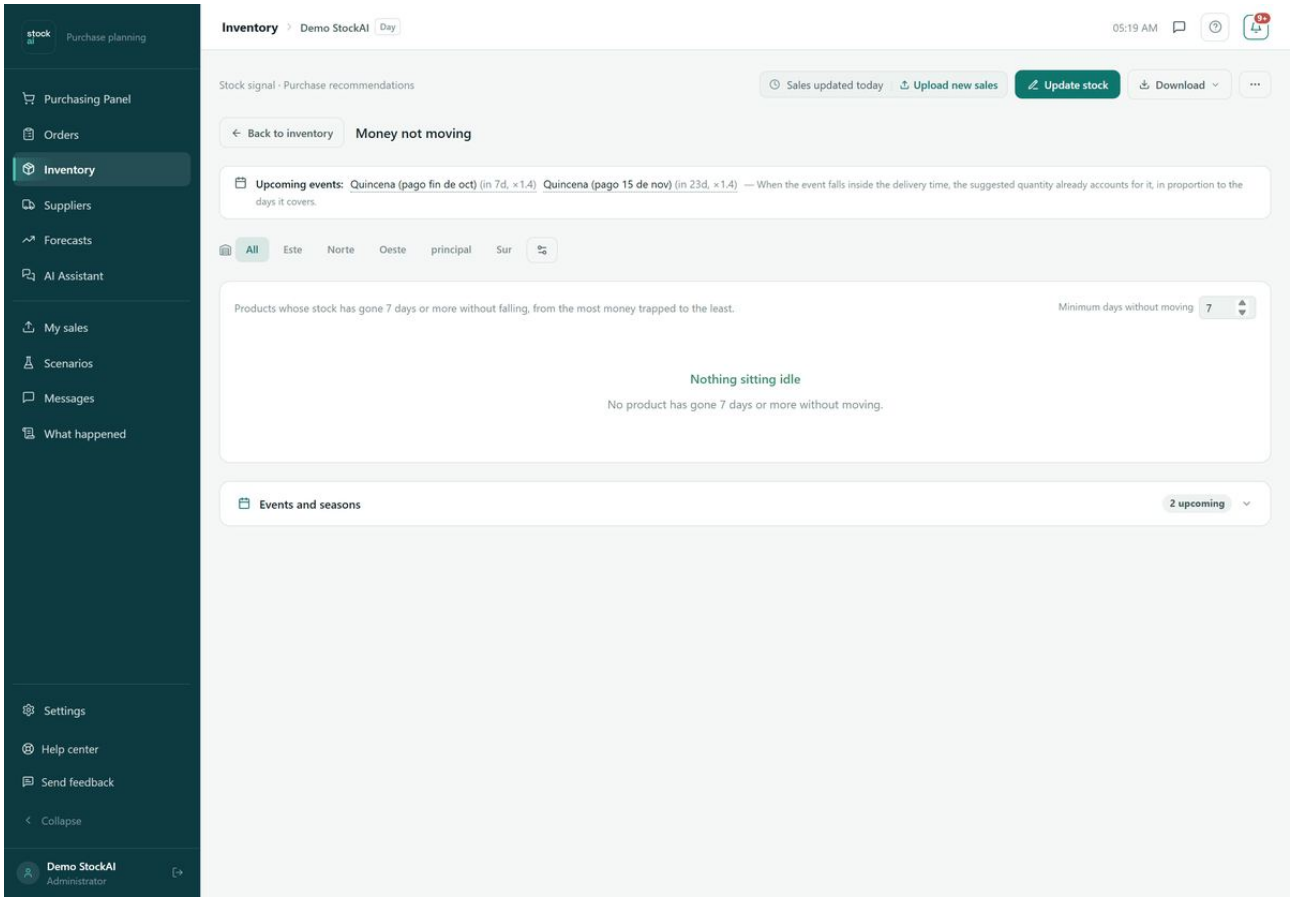
PURCHASE ORDERS WITH A DESTINATION

With several warehouses, the Purchasing Panel’s cart asks "Deliver to" and the manual order asks for a "Destination warehouse". When you record the arrival, the stock rises in that warehouse. When you import stock by CSV, rows go into the warehouse you are looking at, unless the file carries its own warehouse column.

THE ANALYSIS VIEWS

Money not moving

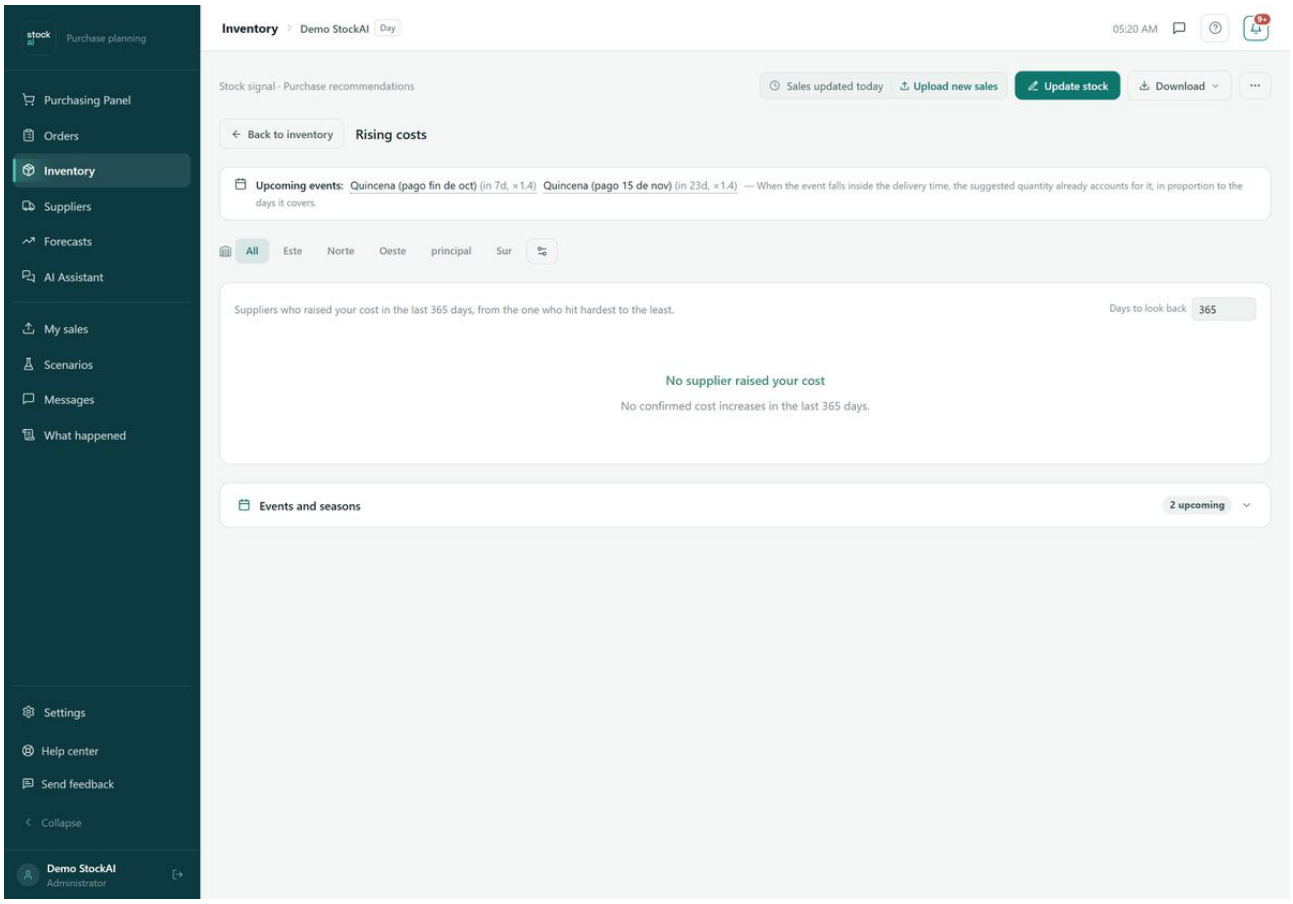
Products whose stock has not moved for at least the days you set in “Minimum days without moving” (7 to 365, 90 by default), from the most money trapped to the least. It needs no forecast: it reads your stock's real history. On top: the total in money, how many products and how many have no cost (left out of the total). Columns: Product, Days still, Stock, Value, Category and Status. Below, how many products were left out for lack of history or for having moved recently.



“Money not moving” when no product has been idle for the minimum days; with idle products, the total and the table described above appear.

Rising costs

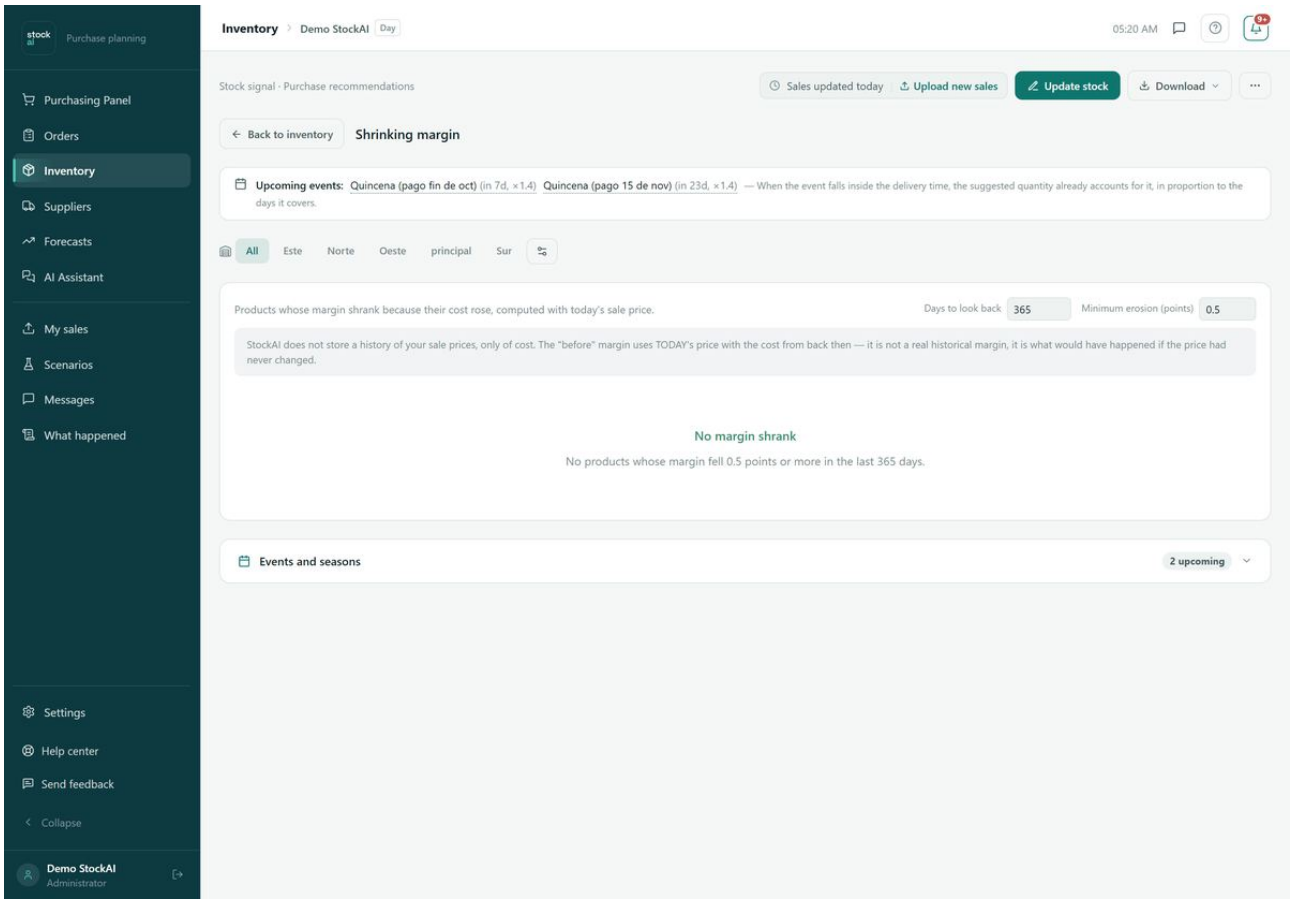
Suppliers who raised your cost over the last “Days to look back” (365 by default), from the one who hit hardest to the least: Supplier, Times raised, Cumulative rise and Hardest-hit products (“from X to Y (Z%)”). Only costs from orders that actually arrived count.



“Rising costs” when no supplier raised your cost in the period; with increases, the table described above appears.

Shrinking margin

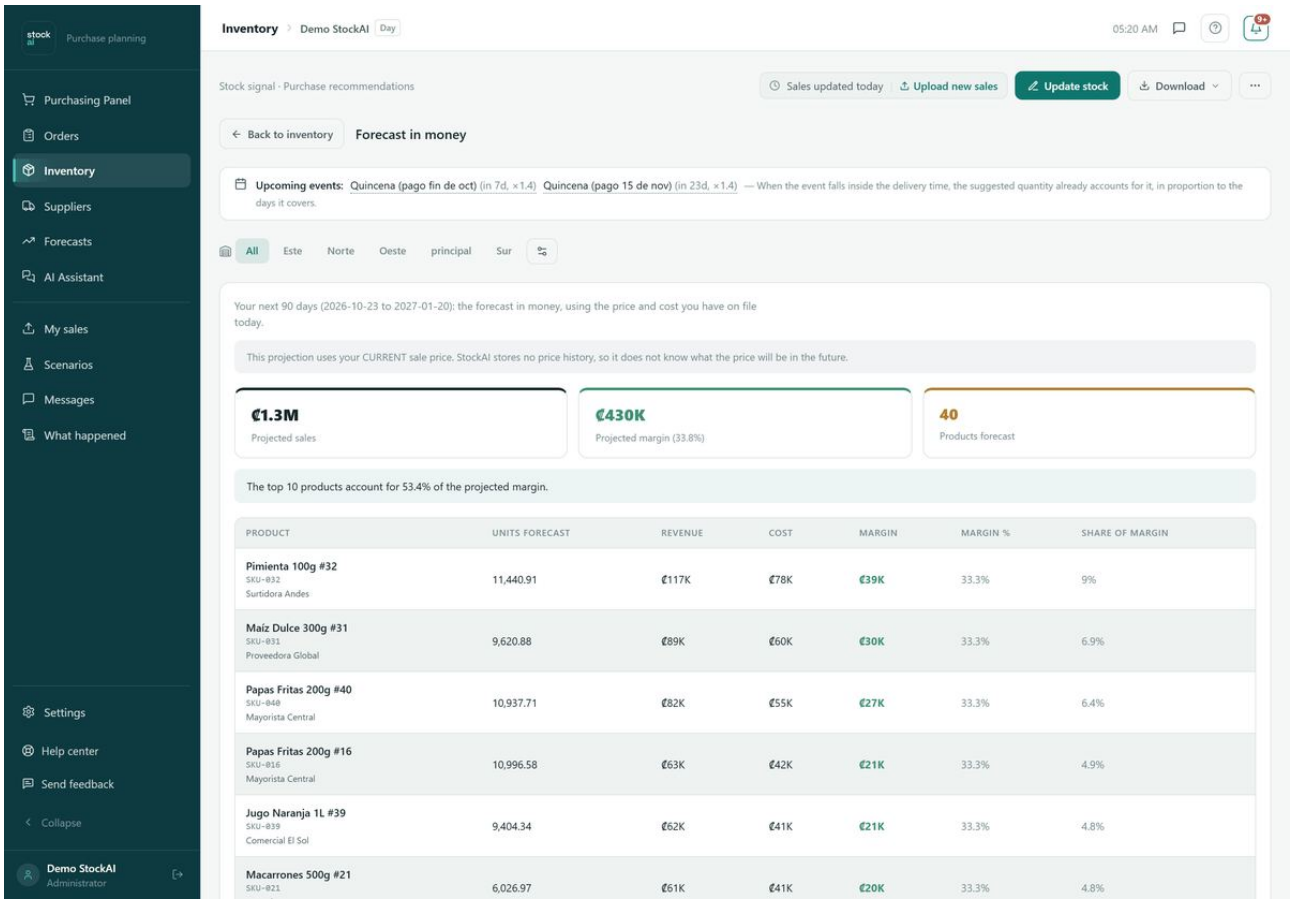
Products whose margin shrank because their cost rose, with “Days to look back” and “Minimum erosion (points)” (0.5 by default). Columns: Cost before, Cost now, Margin before (estimated), Margin now and Points lost; “You are selling below cost” when the margin is negative. Since StockAI does not store your sale price history, the “before” margin uses today's price with the cost from back then.



“Shrinking margin” with no eroded margin in the period; with erosion, the table described above appears.

Forecast in money

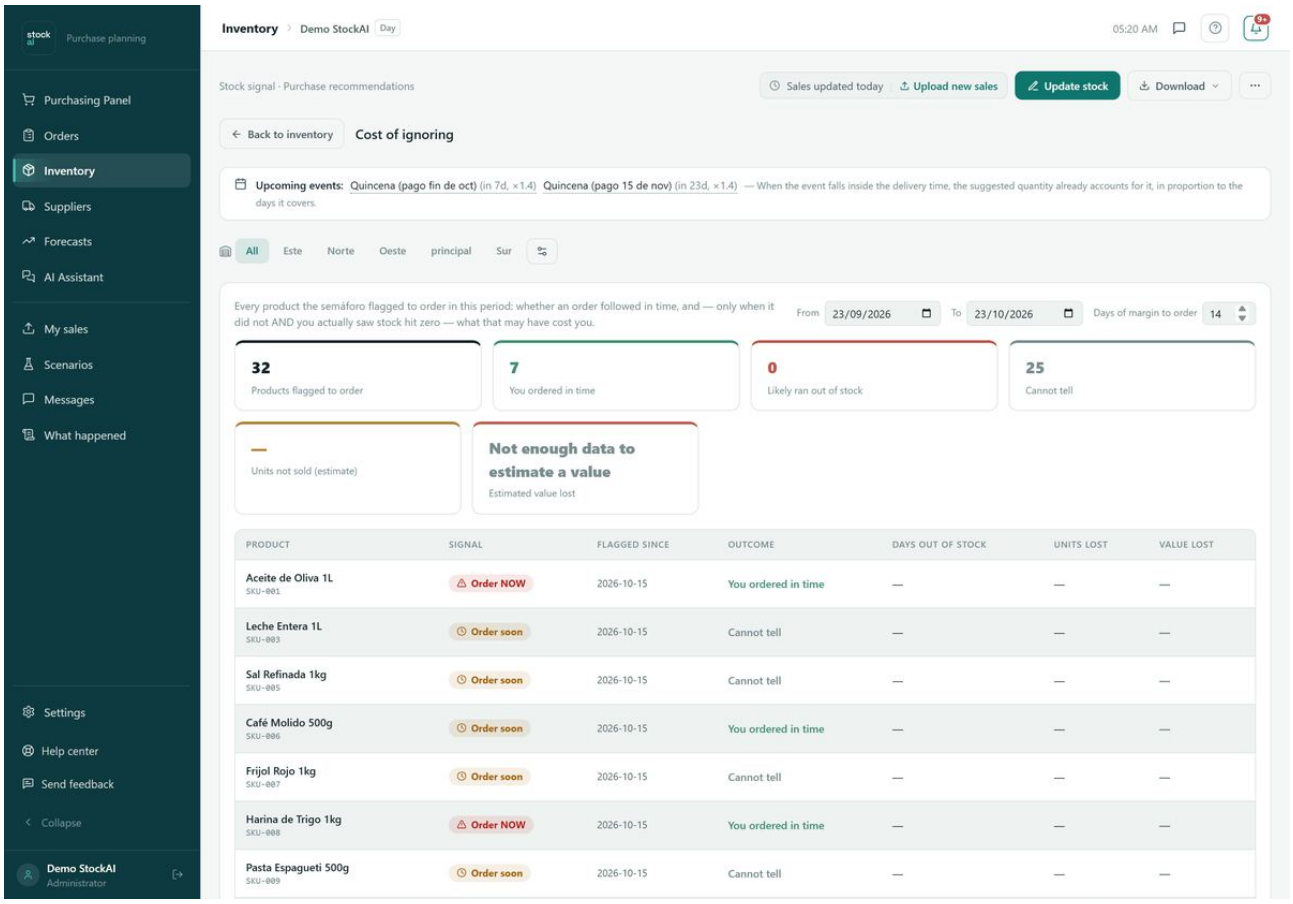
Your coming days in money, with the price and cost on file today: Projected sales, Projected margin and Products forecast, and per product Units forecast, Revenue, Cost, Margin, Margin % and Share of margin. Products with no price or no cost show as “Unknown” and are left out of the totals. It needs a finished forecast.



“Forecast in money”.

Cost of ignoring

Every product the signal flagged to order between From and To, and whether an order followed within “Days of margin to order” (14 by default). Outcome per product: You ordered in time, Likely stockout (no order, and stock was seen at zero: with days out of stock and estimated units and value lost) or Cannot tell (no order, but stock was never seen at zero).



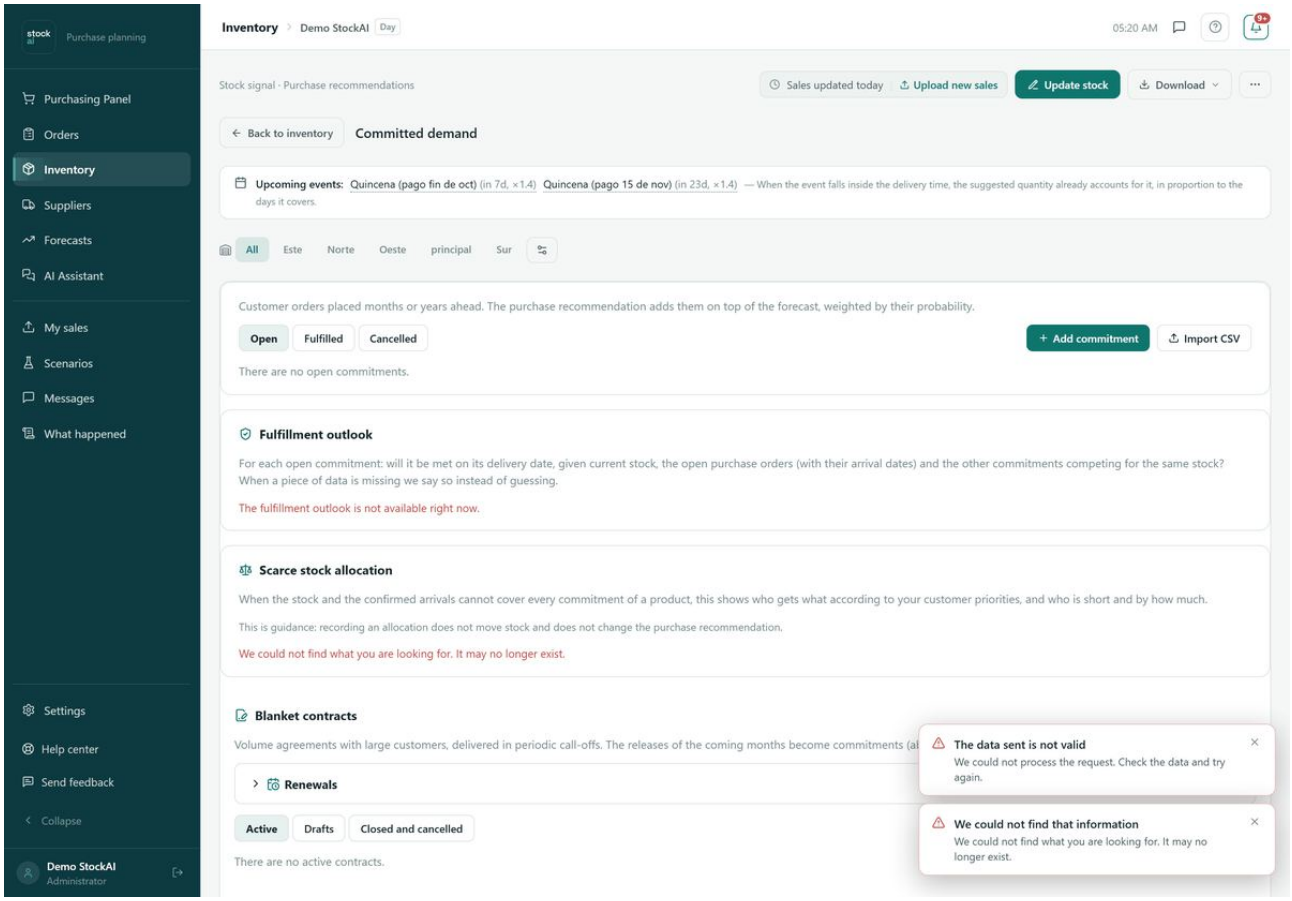
“Cost of ignoring”.

Committed demand

For customers who order months or years ahead. It brings seven panels together; everything you record here is added to the purchase recommendation, weighted by its probability:

Committed demand	Customer orders with Product (SKU), Delivery date, Quantity, Customer, Probability (%), Warehouse (optional) and Note. “Add commitment” or “Import CSV” (columns sku, delivery date, quantity, customer, probability, warehouse, note; all or nothing). Each commitment can be Mark fulfilled, Cancel or Reopen, and says whether it is covered or at risk and when to order by.
Fulfillment outlook	For each open commitment: whether it will be met on its date given stock, open orders and the other commitments competing for the same stock, and the money at risk by customer and by contract.
Scarce stock allocation	When stock cannot cover everyone, who gets what according to customer priority (1 first, 9 last). Calculate, What if (change priorities or add a hypothetical order without saving), “Record reservations” and “Release reservations”. It is guidance: it moves no stock and does not change the recommendation.
Blanket contracts	Volume agreements with periodic releases: customer, contract number, warehouse, period, release schedule (paste the table from a spreadsheet), tolerance, price, notice period and renewal alerts. “Save and activate”, “Save as draft”, Revise, Close or Cancel. The coming months' releases become commitments.

Customer portal	A private link where a corporate customer sees only their own commitments (never stock, costs or other customers). Choose the customer, the language, whether it shows the dates you promise and how long it is valid, then press “Create link”. The link is shown only once: copy it. You can Revoke or Reopen it.
Recurring deliveries	“N units every week or month, from one date to another”, with weekday or day of the month, what to do on a holiday and the customer's holidays. “Save and create commitments”, Change, Pause (withdraws the future commitments) and Resume.
Forecast by analogy	For a new product with no history: say which products it will resemble (up to 5), a Factor from 0.1 to 10 and the launch date. Their forecast is used until the product has data of its own. Undo returns it to “No data”.

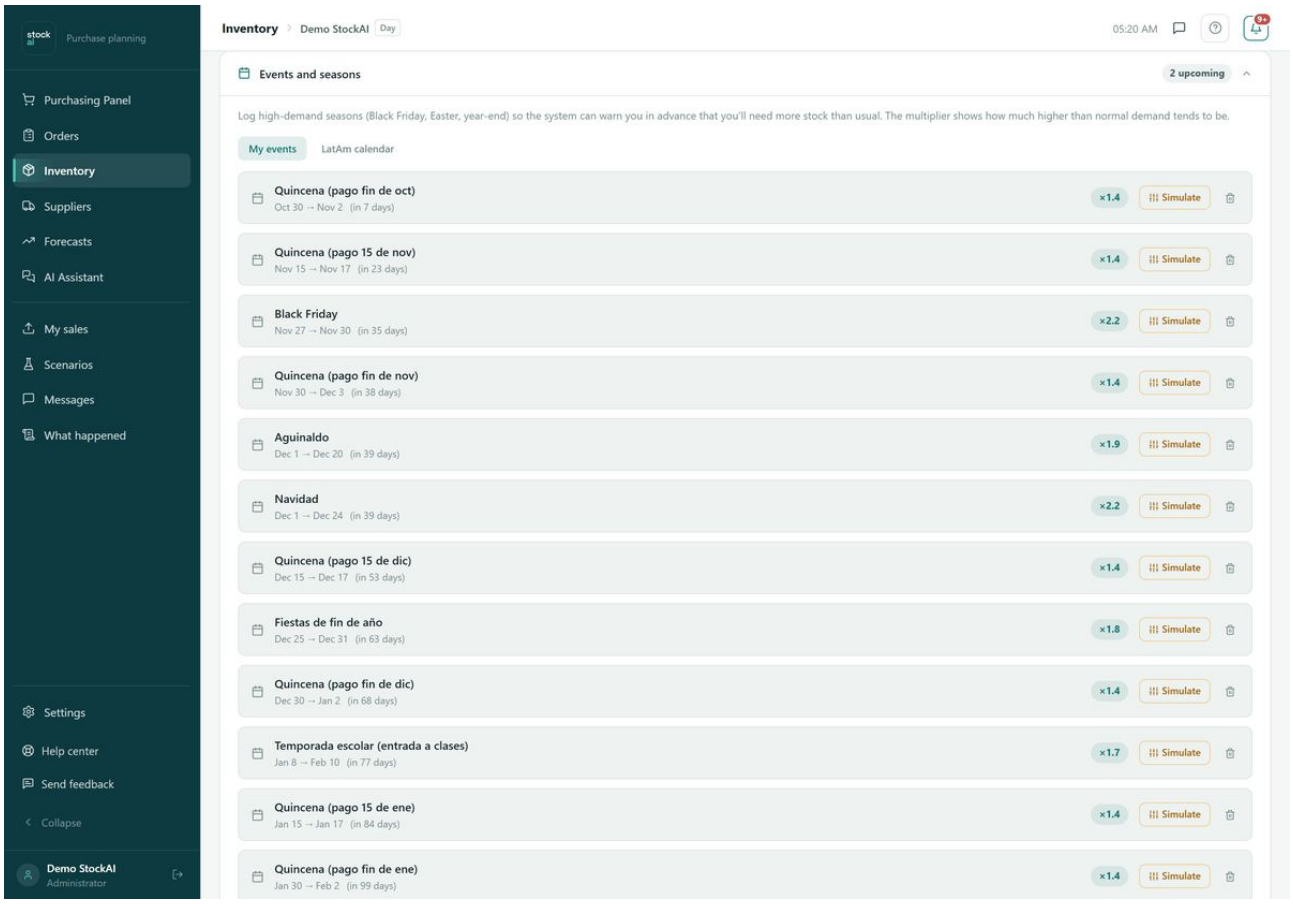


“Committed demand”.

EVENTS AND SEASONS

At the bottom, the folding “Events and seasons” panel records high seasons so the system warns you in advance. It has two tabs:

My events	“Add event or season”: name, Start date, End date, Demand multiplier (mild to peak) and notes, then “Save event”. Each event has Simulate (what would happen to your stock: how many extra units to order and by when) and Delete event. Past events are hidden.
LatAm calendar	Commercial events StockAI already knows. Pick the Country:, press “Load calendar” and switch each event on or off. “Refresh calendar (add next year)” adds the following year.

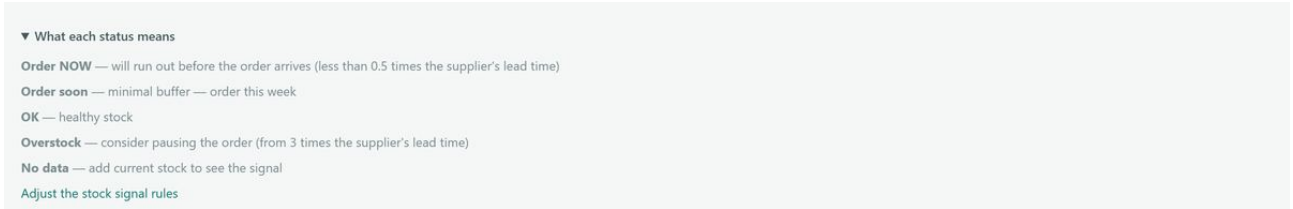


“Events and seasons”.

When an event falls inside the delivery time, the suggested quantity already accounts for it, in proportion to the days it covers.

WHAT EACH STATUS MEANS

At the very bottom, “What each status means” opens the signal legend with your company's rules (for example “less than 0.5 times the supplier's lead time”) and the “Adjust the stock signal rules” link, which takes you to Set up inventory.



The legend.

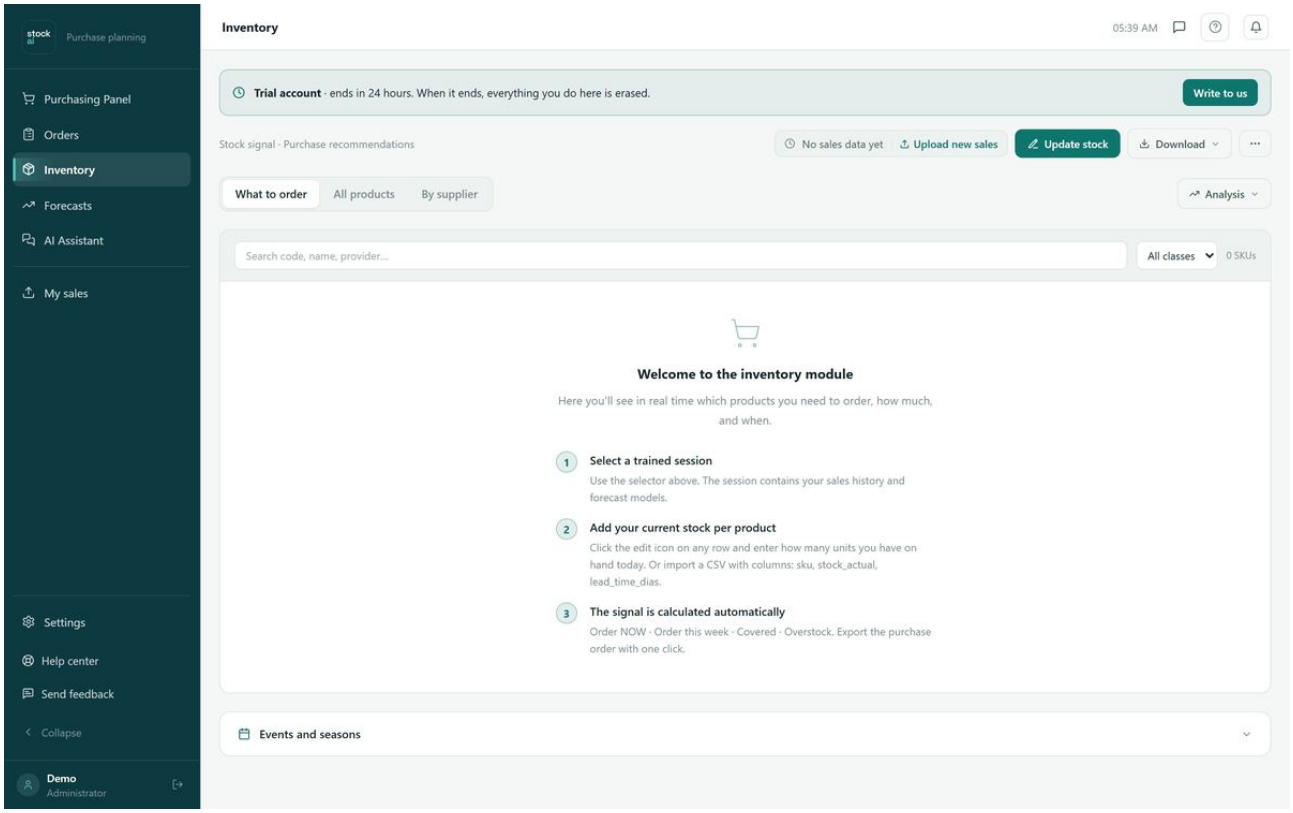
WHEN THE SCREEN IS EMPTY

· “Welcome to the inventory module”: there is no finished forecast and no stock. Upload your sales in My sales and load your stock.

· Notice “You do not have a finished projection yet…”: you see your products' stock with the “No data” signal and no suggested quantity. “Upload sales” takes you to load the history.

· “No product has stock loaded”: there is a forecast but no stock. “Upload current stock” opens the quick editor.

· “No data in this warehouse”: the chosen warehouse has no stock and no assigned demand for the active forecast.



An account with stock but no finished forecast: everything on “No data” and no suggested quantity.

Continue with Stock count, Set up inventory and Inventory sync.

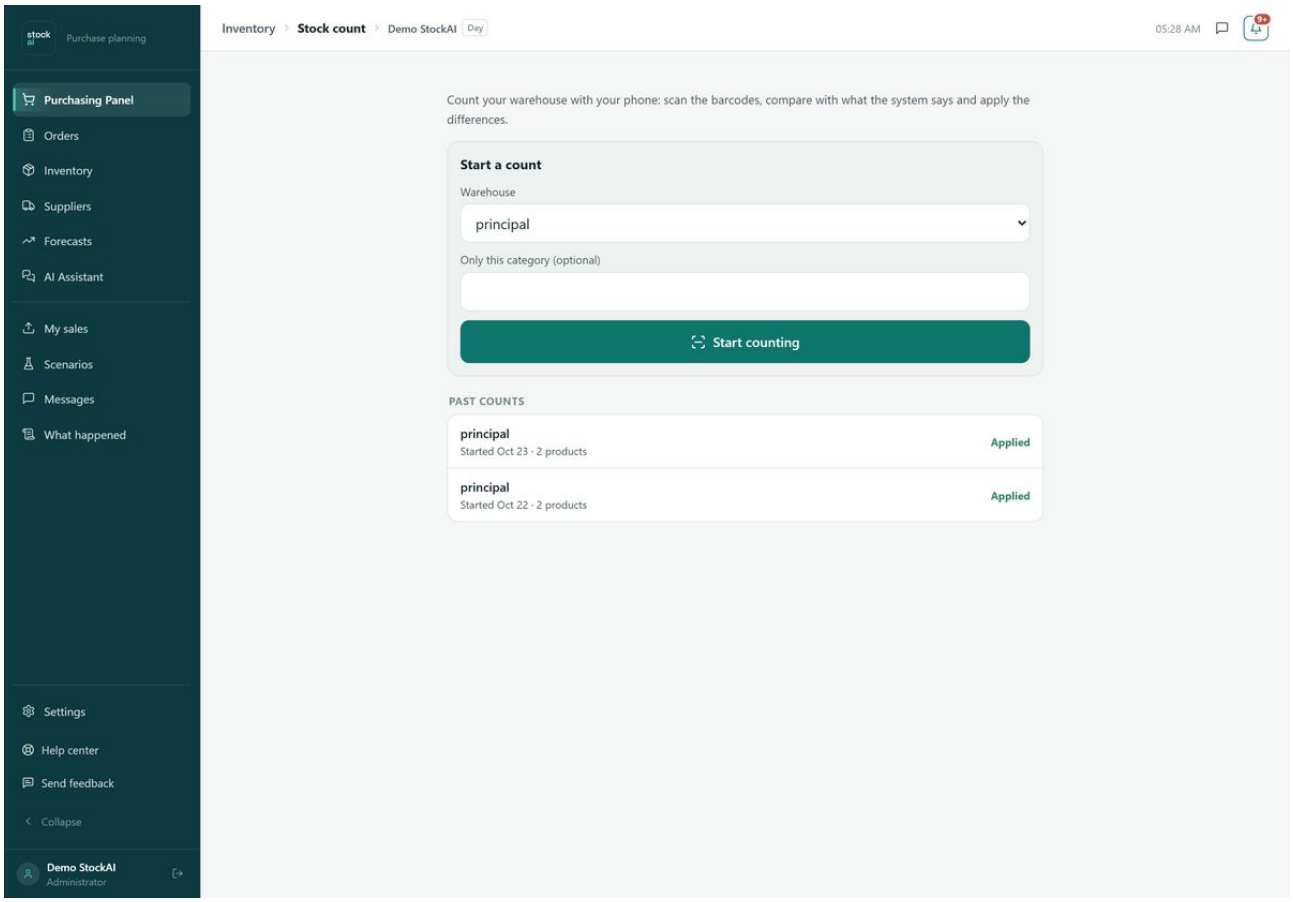
Stock count

Count your warehouse with your phone or a barcode reader, compare what you counted with what the system says, and apply only the differences, with a record of who and when.

The Stock count opens from the ... menu in Inventory (“Stock count”). It is not in the sidebar. It works on a phone (the camera reads barcodes), with a USB or Bluetooth reader, or by typing the code.

> Who can count
>
> Analysts and administrators start, count, finish, apply and cancel counts. A read-only user sees the list and the review but cannot start or apply (“Your role can view counts, but not start or apply them”).

STARTING A COUNT

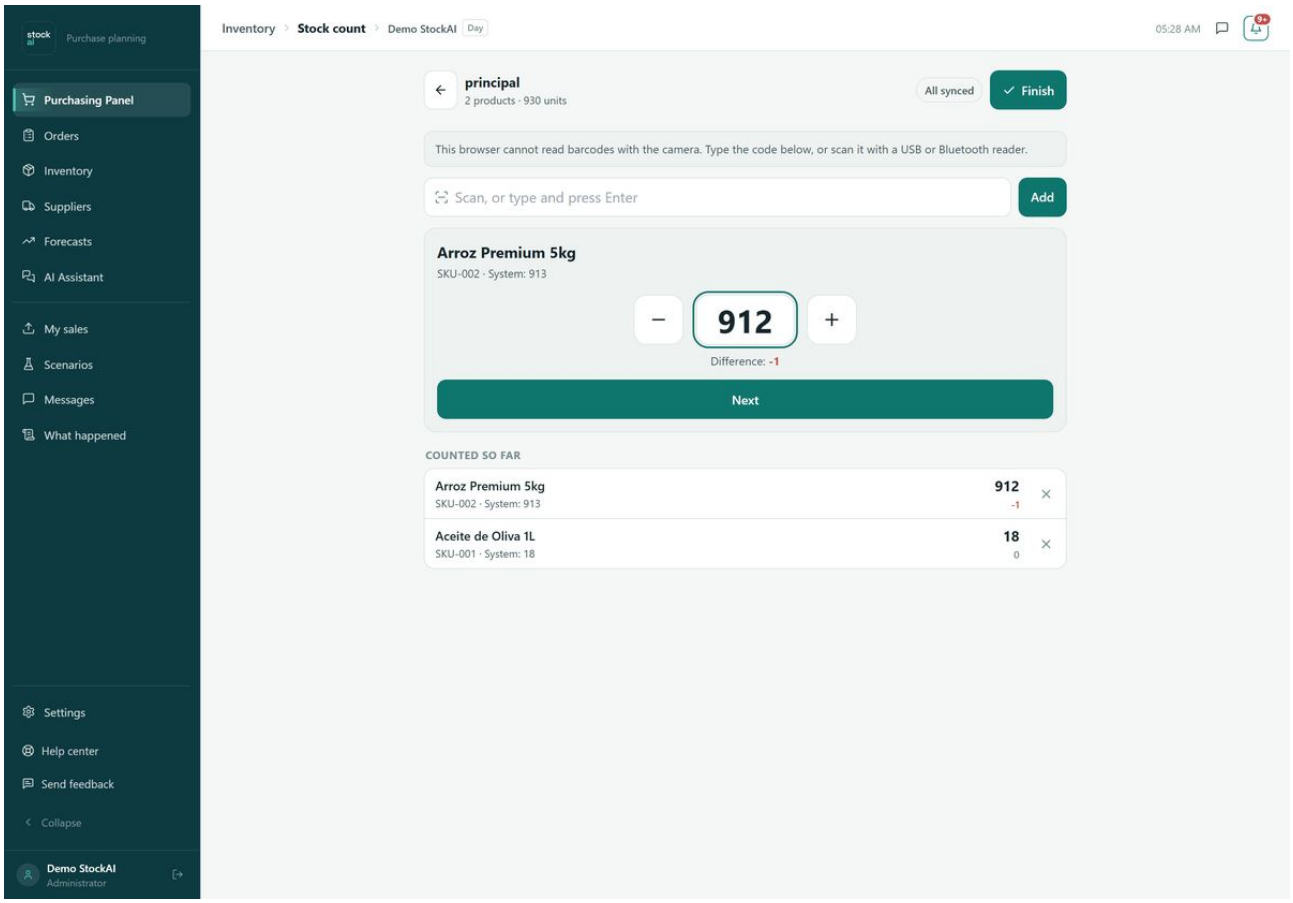


The start screen: start a count, and the counts in progress and past.

1. With several warehouses, choose the Warehouse you will count (the main one by default). With a single warehouse the field is not shown.
2. Optional: in “Only this category (optional)” type a category to count only that part of the catalogue.
3. Press “Start counting”. The counting screen opens.

Below are “Counts in progress” (In progress and To review) and “Past counts” (Applied and Cancelled), each with its warehouse, category, start date and how many products it holds. A click opens the count.

COUNTING



Counting: the last product read on top, what you counted so far below.

← (Leave the count)	Back to the list. The count stays open and you can carry on later.
Warehouse and counter	The warehouse you are counting and “N products · M units”.
Sync status	“All synced”, “Syncing…” or “N pending sync”. Every scan is stored on the device first and sent when there is a connection.
Finish	Closes the count for review. See Finishing and reviewing.
Use the camera / Turn the camera off	Opens the rear camera and reads codes by itself. The same code held in view does not add a unit per frame: it waits two seconds. If the browser cannot read barcodes or has no permission, the screen says so and asks you to type the code.
Barcode or SKU	“Scan, or type and press Enter”. A USB or Bluetooth reader types here too. From two letters on, products are suggested by code or name. Add sends the code.
The product card	Name, SKU, unit and System: N (what the system believed at the first scan). Every scan adds 1. The − and + buttons remove or add a unit, and you can type the Counted quantity directly. Difference shows green (surplus) or red (short). Next saves and returns to the code field.
Counted so far	Each product with what was counted, what the system says and the difference. A click reopens it; the X removes it from this count.

1. Scan or type the first product's code and press Enter. Its card appears with 1 unit counted.

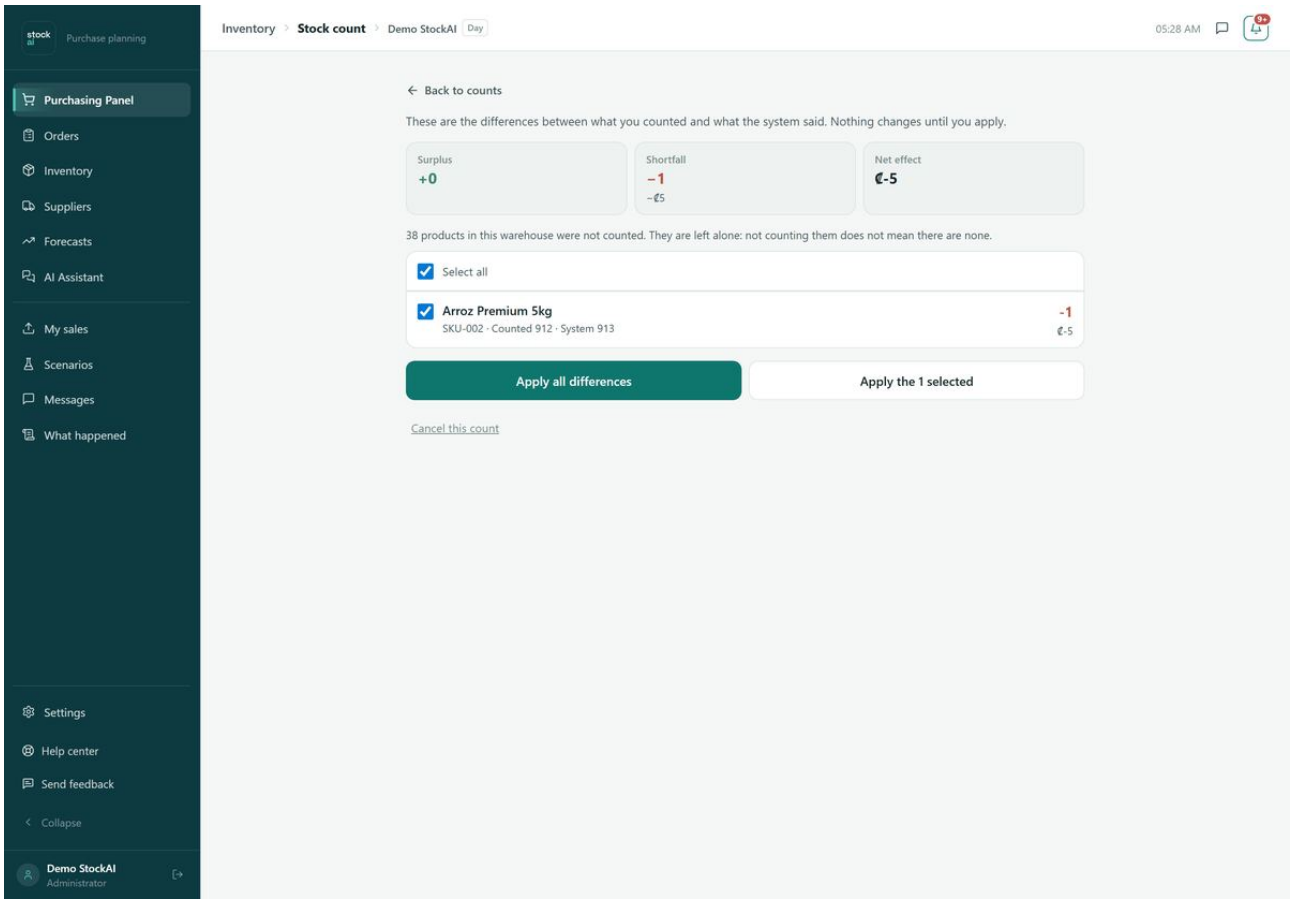
2. Keep scanning the same product (each scan adds 1) or type the total and press Enter.
3. Press Next and go on to the next product.
4. When the aisle or the warehouse is done, press Finish.

> No signal, nothing lost
>
> With no connection you see “No connection: scans are kept on this device and sent automatically when you are back online”. The catalogue stored on the device answers without signal; a code that is not in it cannot be looked up until you are back online. If the browser cannot keep scans across a reload, the screen asks you to keep it open until they sync.

We could not find “…” in your inventory	The code matches no SKU and no barcode.
The code “…” matches several products	Several products share that barcode: search by SKU instead.
It has no recorded stock in …	The product exists but never had stock in this warehouse; applying the count will create it.
Scans the server did not accept	Refused scans (for example, the count is no longer open). They are never dropped silently: review them and press Discard.

FINISHING AND REVIEWING

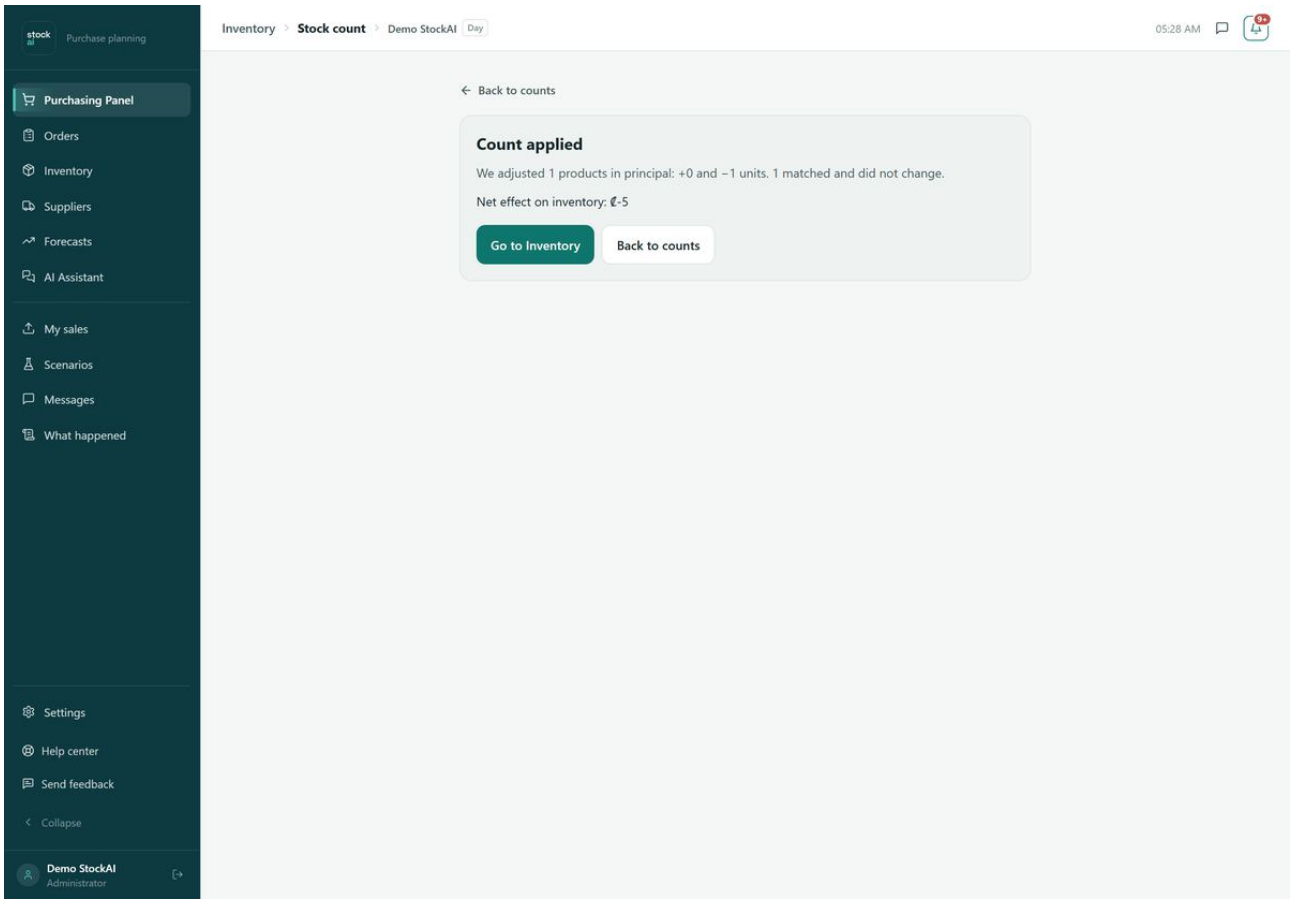
Finish asks “Finish the count?”: afterwards you cannot add products and you move on to reviewing the differences. You cannot finish with unsynced or unresolved refused scans. Stock does not change until you apply.



The review: differences from most to least money, nothing changes until you apply.

Surplus / Shortfall / Net effect	Units and money over, under and in total. Products with no cost are left out of the value, and the screen says how many.
Products not counted	“N products in this warehouse were not counted. They are left alone: not counting them does not mean there are none.”
Each difference	“Counted N · System M”, the difference and its value (or “No cost”). “Stock changed since you counted it” warns that goods came in or went out meanwhile: the difference will be applied, the number will not be overwritten.
Select all / checkboxes	Choose which differences to apply.
Apply all differences / Apply the N selected	Write the adjustment into that warehouse's stock.
Cancel this count	Stock does not change; the scans stay saved but can no longer be applied.

1. Check each difference. If one looks wrong, untick it.
2. Press “Apply all differences” or “Apply the N selected”.
3. Confirm “Apply the count?” with Apply.
4. You see “Count applied”: how many products were adjusted, units added and removed, and the net effect in money. “Go to Inventory” or “Back to counts”.



The summary of an applied count.

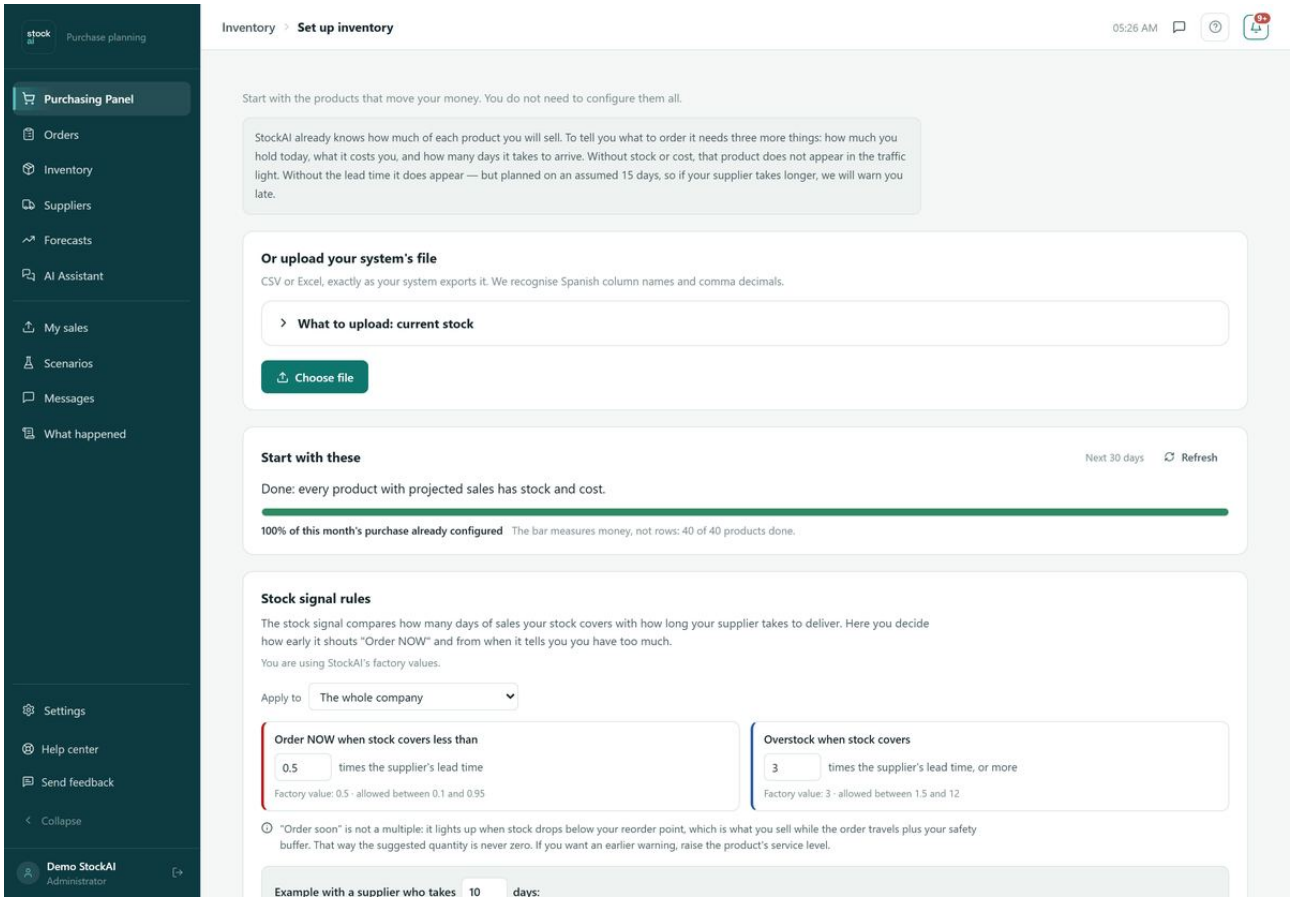
> A count is applied only once
>
> Applying writes the difference (counted minus system at scan time) onto today's stock, never below zero: so a reception recorded while you were counting is not erased. Each adjustment is recorded in the history with the reason “physical count”. A count cannot be applied twice, and the lines you left unticked will not be applied later: to fix them, run another count.

> When a sync owns the stock
>
> If a sync owns the stock of those products, the review says so before you apply: your count is applied, but the next sync replaces it with what your system says.

Set up inventory

Where you fill in what the stock signal needs (stock, cost and lead time), starting with the products that move your money, and where you decide the signal rules and the service level per class.

Set up inventory opens from the … menu in Inventory. At the top it explains why it exists: to tell you what to order, StockAI needs how much you hold today, what it costs you and how many days it takes to arrive. Without stock or cost, the product does not appear in the stock signal. Without the lead time it does appear, but planned on an assumed 15 days.

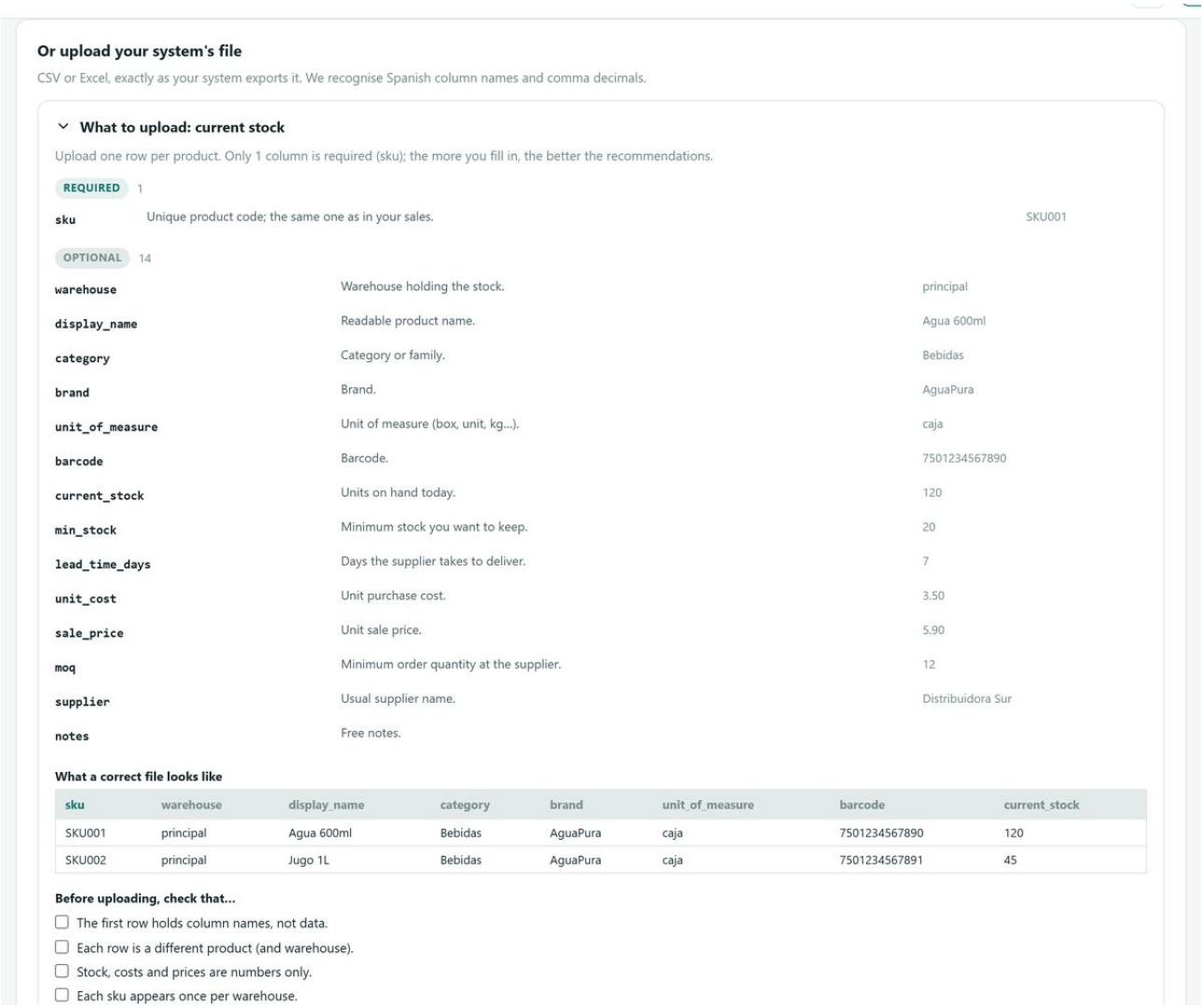


The screen: four blocks from top to bottom.

> Who can change anything
>
> Importing, saving values, changing the signal rules and applying service levels is for analysts and administrators. A read-only user sees everything; in the rules they read “Only an analyst or an administrator can change these rules”.

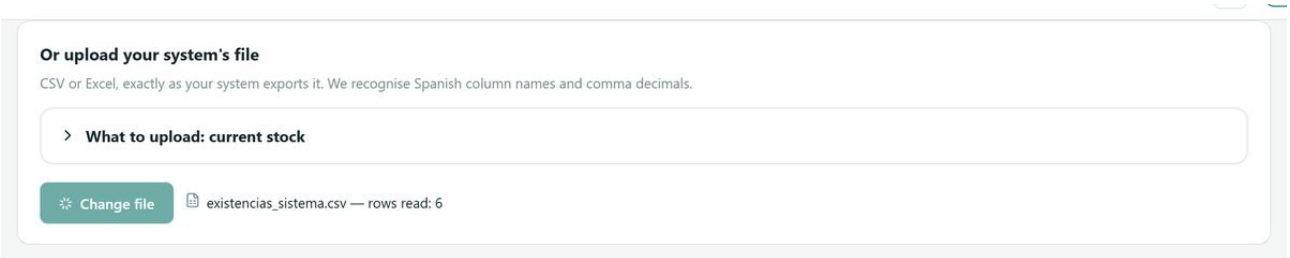
OR UPLOAD YOUR SYSTEM'S FILE

Upload a CSV or Excel file (.csv, .txt, .xlsx, .xlsm, .xls) exactly as your system exports it: we recognise Spanish column names and comma decimals. “What to upload: current stock” unfolds with the columns: only sku is required; the optional ones are warehouse, display_name, category, brand, unit_of_measure, barcode, current_stock, min_stock, lead_time_days, unit_cost, sale_price, moq, supplier and notes. It includes an example, a checklist, “Download CSV template” and “Download Excel template (.xlsx)”.



The file guide, unfolded.

1. Press “Choose file” and pick the file. You see “name — rows read: N”.
2. A CSV is checked in your browser first: rows with a different column count, no code, repeated products (the last row wins), text in numbers and negative values, with the row and column of each case.
3. Under “This is how we read your columns” check which column of your file holds each field (Product code, Name, Current stock, Minimum stock, Lead time (days), Cost, Sale price, Minimum order, Supplier, Category, Brand, Unit, Barcode, Warehouse, Notes). Change any that is wrong or choose “Do not import”. The product code is required.
4. Read the summary: Rows ready to import, Rows with problems left out and Rows with no product code, skipped, and the Preview with the first five rows as they would be saved.
5. If your file writes numbers like 1.250, answer “Your file writes numbers like 1.250. How much is that?” by picking one of the two readings. Until you answer, the import is refused.
6. Tick “Do not overwrite what I corrected by hand” if only empty values, or values from an earlier import, should be filled.
7. Press “Import (N)”. You see “Products imported: N.” and, if some rows could not be saved, which ones.

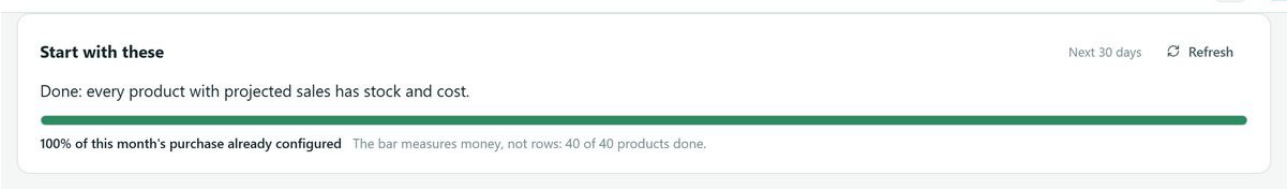


After choosing the file: the mapping, the number question and the preview.

> When a sync owns the value
>
> If some row changes a value a sync brings from your system, the importer says so before importing: it is imported anyway, but the next sync replaces it.

START WITH THESE

The list of products missing something, ranked by money: what replacing their sales over the next 30 days will cost you. The sentence on top says how many products to complete to reach what share of this month's purchase, and the bar measures money, not rows: “X% of this month's purchase already configured”. With no costs or prices yet, it ranks by units and says so.



“Start with these” when nothing is missing any more: “Done” and the bar at 100%. With pending products, the table described here appears below.

Product	Code and name.
Projected sales	How many units we expect you to sell in the period, from your history.
Worth	What replacing those sales will cost you. It is the figure the list is ranked by; next to it, whether it used your cost, your sale price or an estimated cost.
% of month	How much this product weighs in your whole purchase for the period.
Cumulative	Counting this product and everything above it, how much of your purchase you have covered.
Missing	stock, cost, lead time, price or supplier.
Fill in	Three boxes: Stock (what you physically hold today, not counting anything in transit), Cost (what you pay per unit, not your sale price) and Lead time (days), plus the Save button.

1. Start with the first row. Type what is missing in Stock, Cost or Lead time.
2. Press Save on that row. You see “Saved” and the bar goes up.
3. Work down until Cumulative is near 80%: the rest barely move money.
4. Refresh reloads the list.

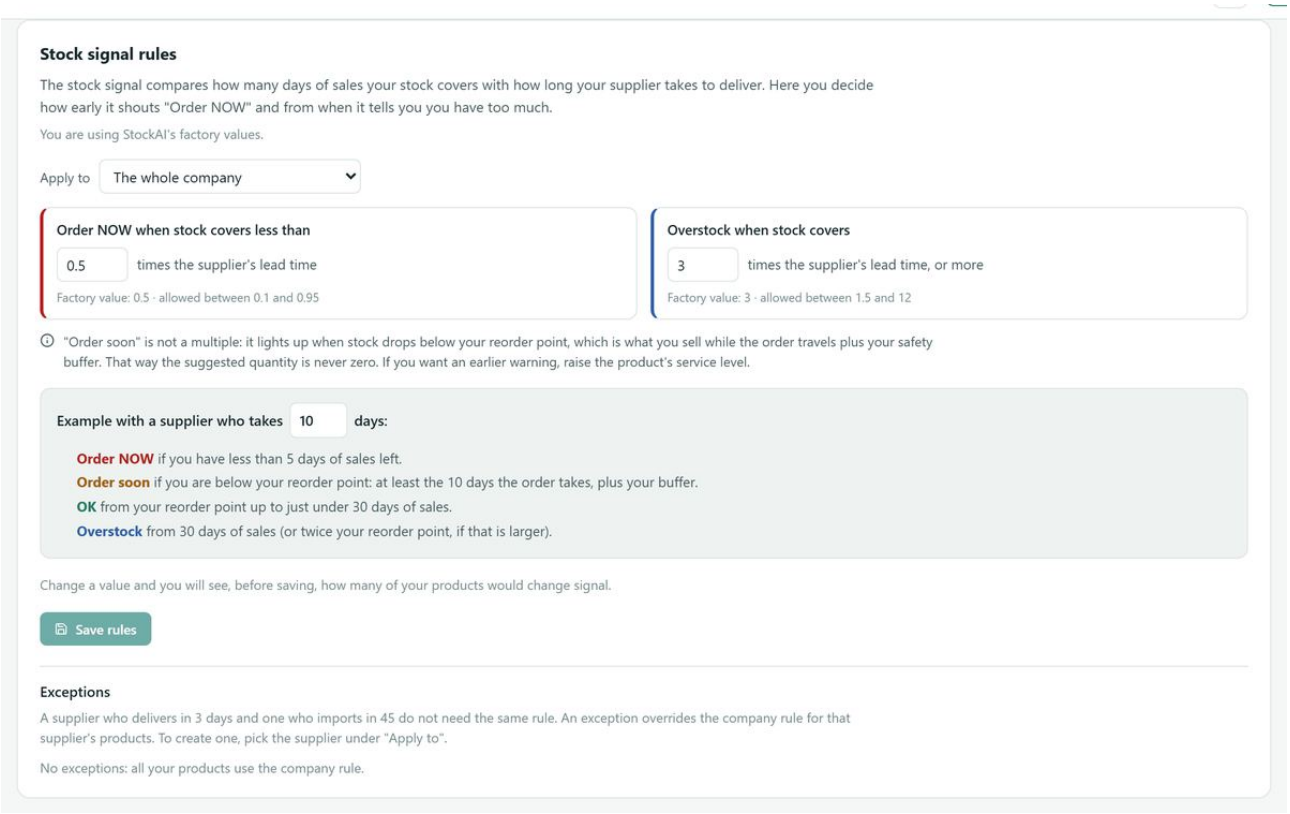
> A new product needs its stock

> If the product has no record yet and you save only the cost, the row asks for the stock: “Enter how much of this product you have today”. Leaving it blank would force us to assume zero, and the stock signal would flag it as urgent even with a full warehouse.

The list shows up to 50 products; below, how many are left and what share of your purchase they add up to. With no forecast you see “There is no forecast to prioritise with yet”.

STOCK SIGNAL RULES

The stock signal compares how many days of sales your stock covers with how long your supplier takes. Here you decide how early it says Order NOW and from when it tells you you have too much. The grey line says whether you use the factory values or your company's (with the date they were saved).



“Stock signal rules” with the worked example.

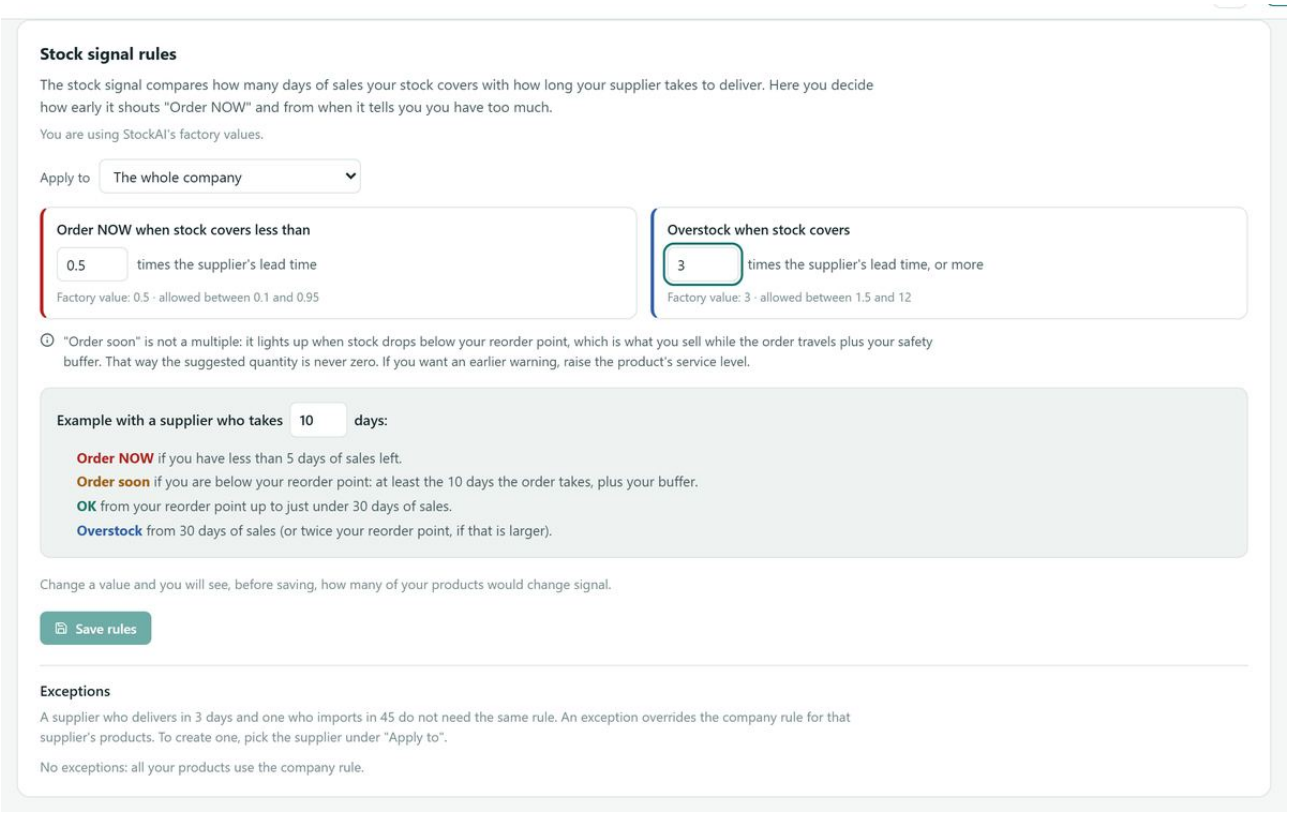
Apply to	The whole company or a Supplier (or a category that already has an exception). A supplier with an exception carries “has an exception”.
Order NOW when stock covers less than	A multiple of the supplier's lead time. Factory value 0.5; allowed between 0.1 and 0.95.
Overstock when stock covers	Factory value 3; allowed between 1.5 and 12.
“Order soon”	It is not a multiple: it lights up below your reorder point (what you sell while the order travels plus your buffer). For an earlier warning, raise the product's service level.
Example with a supplier who takes N days	Change N and read the rule with numbers: when it would be Order NOW, Order soon, OK and Overstock.

1. Under Apply to, choose whether you change the company rule or a supplier's.

2. Type the new multipliers. A value out of range shows the limit in amber.

3. Wait for the preview: “With these values N of your M products change signal”, with how many move from one colour to another, and examples. The server computes it with the real stock signal; nothing is saved yet.

4. Press “Save rules” (or “Save exception” for a supplier). The stock signal, the 8:00 alerts and the purchase suggestions use the new values from then on.

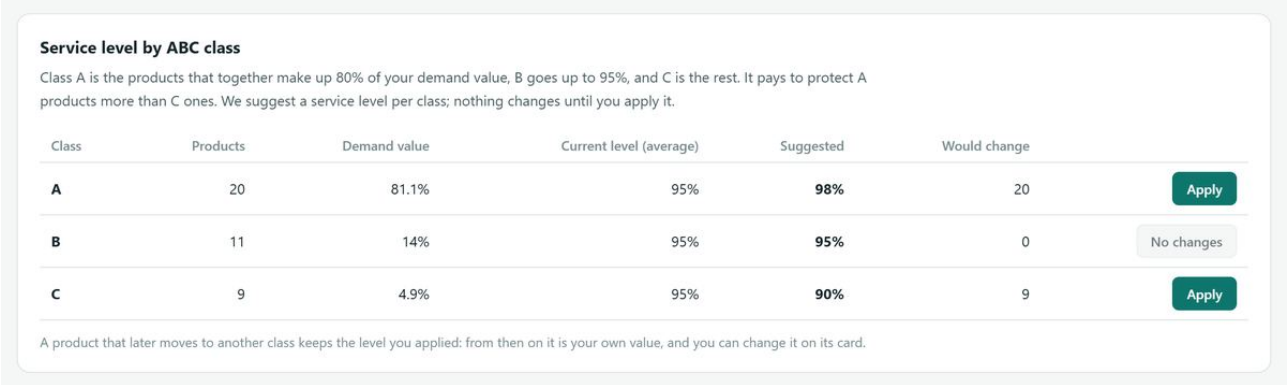


Before saving, the preview says what happens to your products.

Below, Exceptions lists the suppliers' or categories' own rules, with “Remove exception”. “Back to factory values” (only when you changed the company rule) says first how many products would change. Both ask for confirmation.

SERVICE LEVEL BY ABC CLASS

Class A is the products that make up 80% of your demand value, B goes up to 95% and C is the rest. It pays to protect A products more. The table shows per class: Products, Demand value, Current level (average), Suggested and Would change (with how many have their own level).



“Service level by ABC class”.

1. Check each class's Suggested level.
2. Press Apply on the class you want (“No changes” when there is nothing to change).
3. Confirm “Apply X% to class A”. Only products on the factory value change; the ones with a level set by you, a file or a rule are left alone. It is recorded in the audit trail.

A product that later moves to another class keeps the level you applied: from then on it is your own value. With no finished forecast the panel says it cannot classify yet. See also Safety stock.

Inventory sync

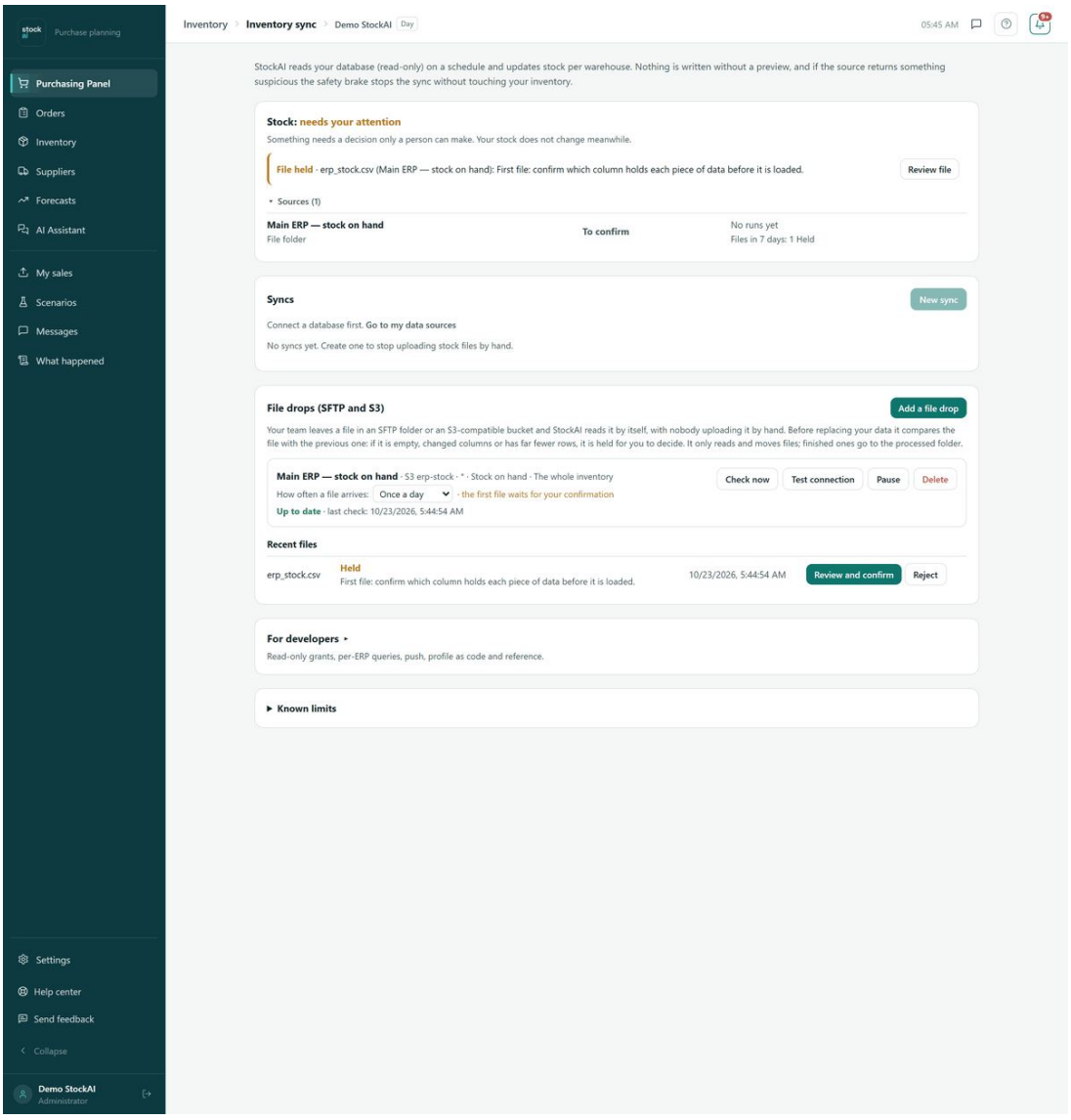
Keep stock up to date without uploading files by hand: StockAI reads your database (read-only), receives what your system sends, or picks up the file your ERP drops in an SFTP or S3 folder, always with a preview and a safety brake.

Inventory sync opens from the … menu in Inventory. There are three ways to feed the stock, and all three end in the same place:

· A database StockAI reads on a schedule (table, view, query or MongoDB collection).

· Your system sends the data (push) to an API address.

· A file drop (SFTP or an S3 or compatible bucket) where your ERP leaves a stock file.



The screen, top to bottom: the state of the stock, the syncs and the file drops.

> Who can do what
>
> Creating, editing, turning on, running and deleting syncs: analyst or administrator. Adding, testing, pausing and deleting file drops (they hold your server's credentials): administrator only. Check now on a file drop and deciding on a held file: analyst or administrator. A read-only user sees the status and the history.

STOCK: THE STATE AT A GLANCE

The panel on top appears as soon as you have at least one sync or one stock file drop. It answers two questions: is the stock current, and is anything waiting for a person? It refreshes by itself every minute.

Stock: up to date	Every source delivered data on time.
Stock: waiting for data	The sources are set up but nothing has arrived yet.
Stock: needs your attention	Something needs a decision. Your stock does not change meanwhile.
Stock: stopped	A sync is stopped and that source is not being updated.
data as of …	The date of the most recent data.

Below, one line per pending matter: File held (with “Review file”), Stopped, No access, Behind or Rows rejected (with “Open sync”). “Sources (N)” unfolds each source with its origin (Database, File folder or Pushed by your system), its state, its last run (new, updated, rejected) and the files of the last 7 days.

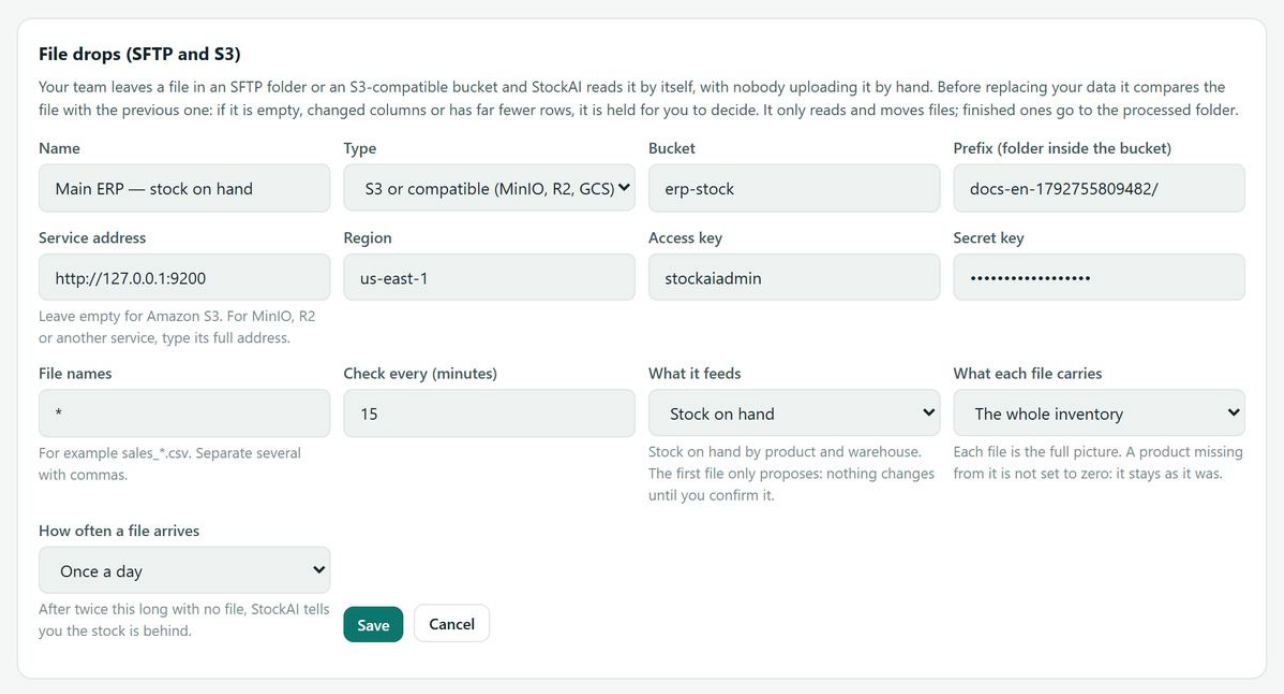


The “Stock” panel with a file waiting for a decision.

FILE DROPS (SFTP AND S3)

Your team or your ERP leaves a file in a folder and StockAI reads it by itself. Before replacing your data it compares the file with the previous one: if it is empty, changed columns or has far fewer rows, it is held for you to decide. It only reads and moves files: finished ones go to the `processed` folder (rejected ones to `rejected`, with a note of the reason). A file is read once it has finished uploading: two checks in a row must see the same size, and it must be at least a minute old. You can have up to 10 file drops.

Adding a stock file drop



The form for an S3 file drop that feeds the stock.

1. Press “Add a file drop” (administrator only).
2. Type a Name and choose the Type: SFTP or “S3 or compatible (MinIO, R2, GCS)”.
3. For SFTP: Server, Port (22), User, Password or Private key (optional) (if you paste one, it is used instead of the password) and Folder. For S3: Bucket, Prefix (folder inside the bucket), Service address (empty for Amazon S3; for MinIO, R2 or another, its full address), Region, Access key and Secret key.
4. Under “What it feeds” choose Stock on hand. (The other option, “Data (sales, catalogues)”, replaces a file already loaded in Files and keeps its mapping.)
5. File names: with Stock on hand the pattern becomes * (any stock file your ERP writes); you can narrow it, for example `stock_*.csv`, and separate several with commas.
6. Check every (minutes): how often it looks at the folder (at least 5).
7. “What each file carries”: The whole inventory (each file is the full picture; a product missing from it is not set to zero, it stays as it was) or Only what changed (each file carries some products; the rest are not touched).
8. “How often a file arrives”: every hour, every 4 hours, every 12 hours, once a day or once a week. After twice that long with no file, StockAI tells you the stock is behind.
9. Press Save. You see “File drop added. Test it...”.

> Private addresses
>
> For safety, StockAI does not connect to private network addresses unless the installation's operator allows it. Credentials are stored encrypted and never shown again.

The file drop in the list

Each file drop shows its type and server or bucket, the pattern, what it feeds and the mode; for stock, “How often a file arrives” (the administrator changes it right there) and whether it waits for the first file or for your confirmation. Then the state: Not checked yet, Up to date, Failing or Stopped, whether it is paused, and the last check. With SFTP, the pinned server key.

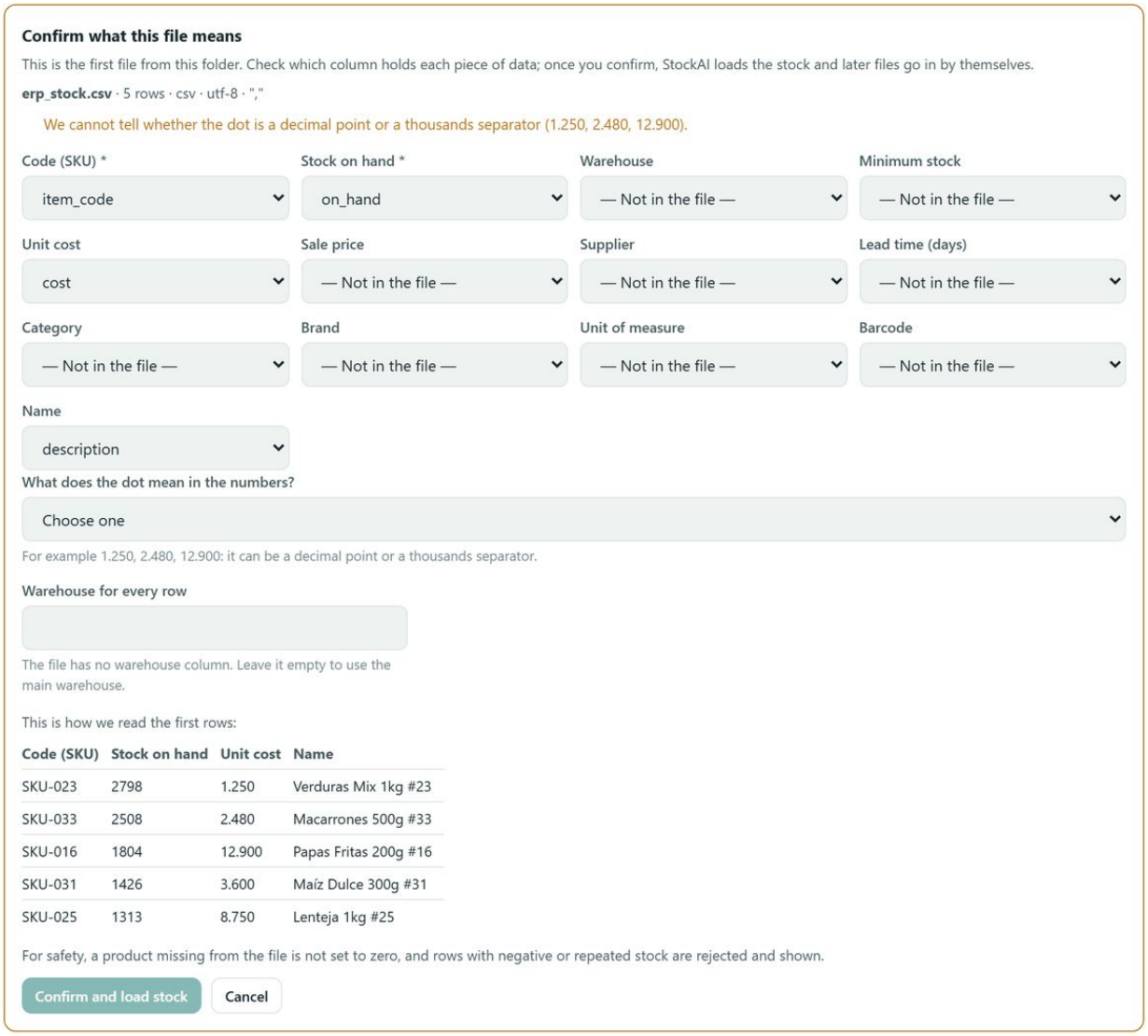


A file drop with the “Test connection” result.

Check now	Looks at the folder right away: “Check done: N applied, N held, N waiting to finish uploading”. A freshly dropped file usually waits on the first check and is read on the next one.
Test connection	“Connection works: N files in sight, M match the file name” and the permissions the account needs, nothing more. With SFTP it pins the server key the first time; if it changes later, the file drop stops and “Accept new key” appears (confirm with whoever runs the server first).
Pause / Resume	Stops checking the folder without deleting it.
Delete	StockAI stops checking it. Data already loaded and the files on your server are not touched.

The first file: confirming what it means

The first file of a stock file drop only proposes: it is held with what StockAI understood, and nothing changes until you confirm it. Recent files shows “Held — First file: confirm which column holds each piece of data before it is loaded” with the “Review and confirm” button.



“Confirm what this file means”.

1. Press “Review and confirm”. On top you see the file, how many rows, the format (CSV, encoding, separator or Excel sheet) and how many warehouses it carries.

2. Read the notices: required columns missing, doubtful columns, an ambiguous dot, dashes in the stock, codes turned into scientific notation by Excel, repeated rows or negative stock (they will be rejected) and rows with no code (ignored).

3. Check which column holds each field. Code (SKU) and Stock on hand are required; the rest (Warehouse, Minimum stock, Unit cost, Sale price, Supplier, Lead time, Category, Brand, Unit of measure, Barcode, Name) are optional: choose “— Not in the file —” when absent. “Guessed from the content: please confirm” marks a column guessed from its values. One column cannot mean two fields.

4. If the numbers carry an ambiguous dot, answer “What does the dot mean in the numbers?”: “A decimal point (1.250 = one point two five)” or “A thousands separator (1.250 = one thousand two hundred fifty)”. Without an answer you cannot confirm.

5. If some stock values are a dash, decide with “A dash in the stock column means zero”.

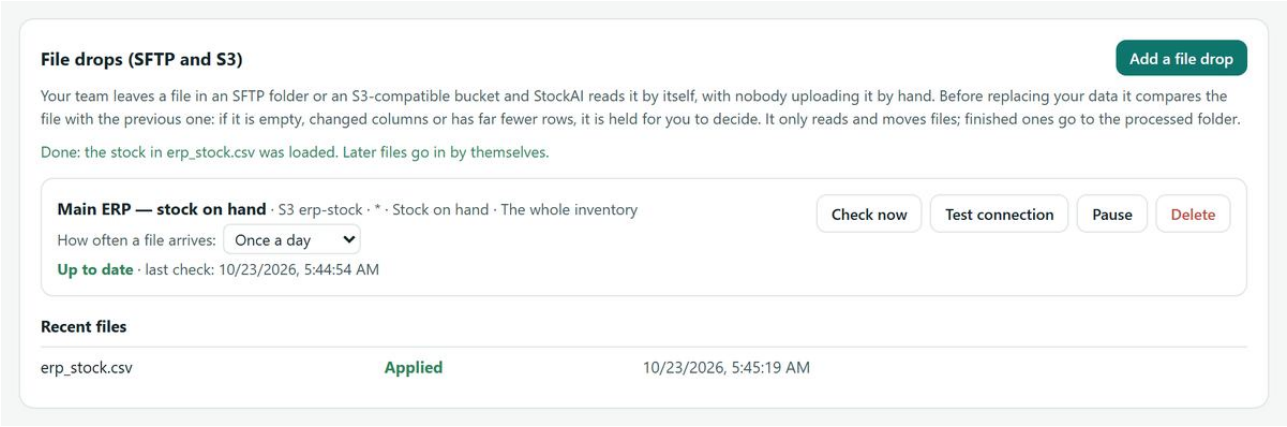
6. If the file has no warehouse column, type the “Warehouse for every row” or leave it empty for the main one.

7. Check “This is how we read the first rows” and press “Confirm and load stock”.

On confirming you see “Done: the stock in … was loaded. Later files go in by themselves.”. The confirmation creates a sync named after the file drop (it shows up under Syncs) with that mapping; from then on every new file goes through the safety brake without asking. Since a file drop feeds it, not a database, that sync shows as “Receives data by push” and has no preview, doctor or “Sync now”: to pick up a new file, use Check now on the file drop.

> Confirming does not turn the brake off
>
> “Confirm and load stock” and “Save columns and apply” say what each column means, not that the quantities are right: the file still goes through the safety brake and, if it would change too much at once, it is held with the reason. Only “Apply anyway” on a held file overrides the brake, and the sync's history marks it “Applied with the brake overridden”. When re-pointing renamed columns, only the fields the sync already read move to a new column: a column you left out does not come back by itself.

> What it never does
>
> For safety, a product missing from the file is not set to zero, and rows with negative or repeated stock are rejected and shown. Nor does it apply a file older than the last one applied: that would turn the stock back.



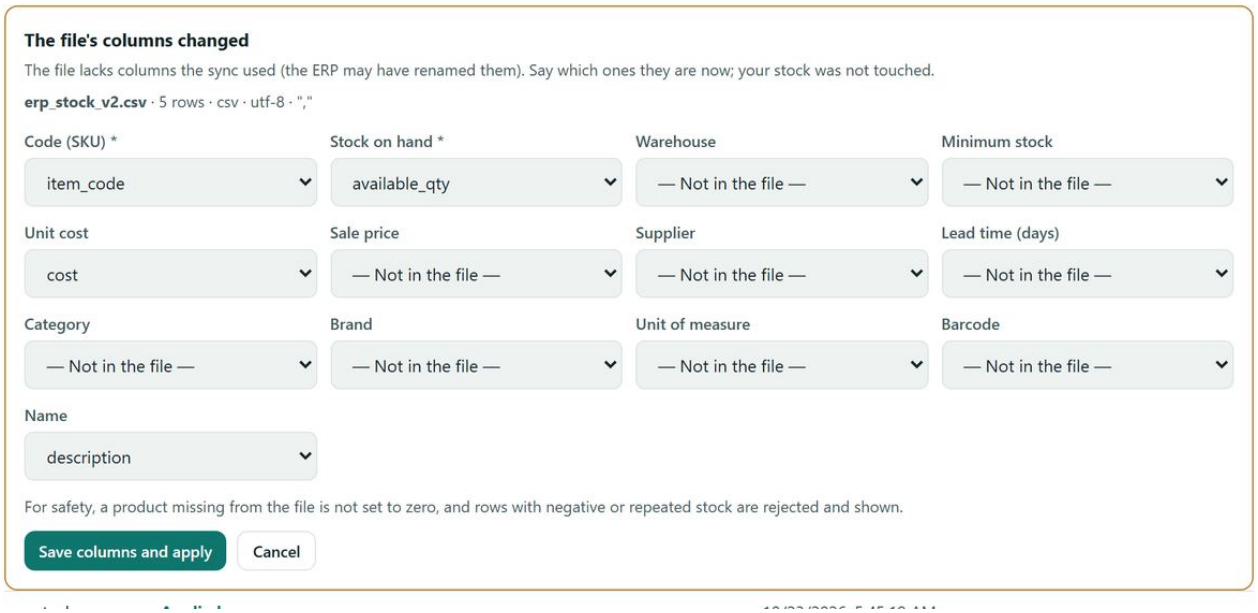
The confirmed file, now “Applied”.

Held, braked or rejected files

Each file under Recent files has a status: Applying, Applied, Held, Rejected or Failed, with the reason. “Could not be moved to processed” warns that the account may not move files (the file is not applied again anyway). The most common reasons for a hold:

Columns the sync uses are missing	Your ERP renamed columns. “Review and confirm” opens “The file's columns changed”: say which ones they are now and press “Save columns and apply”. The confirmed number format is kept. Your stock was not touched.
The safety brake stopped it	The file would change too much at once (many products vanish, far fewer rows, many rejected rows or huge quantity jumps).
The numbers changed decimal format	Earlier files used another convention.
It is older than the last file applied	Applying it would turn the stock back.

The sync for this file is off / paused	Turn it on under Syncs.



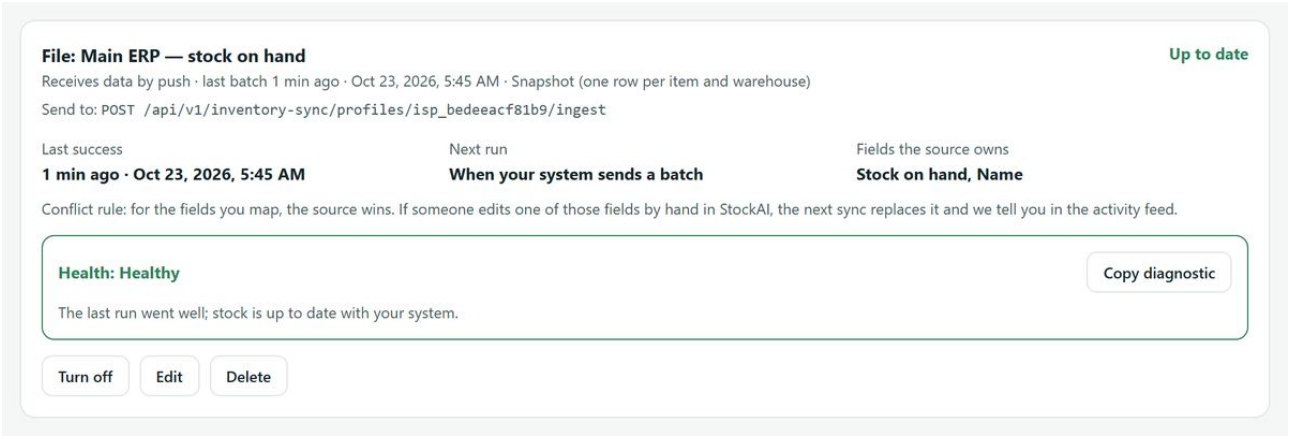
Re-pointing renamed columns.

For a held file without an analysis the buttons are “Apply anyway” and Reject (a person rejects it and it is recorded). For one with an analysis, “Review and confirm” and Reject.

SYNCS

The sync list shows each one with its name, what it reads (or “Receives data by push”), the last success and its state: Up to date, Syncing…, Stopped by the brake, No recent success, Last run failed, Off, Paused or Blocked. With no database connected you see “Connect a database first.” with the “Go to my data sources” link (SQL sources); file drops still work.

A sync's detail



A sync's detail.

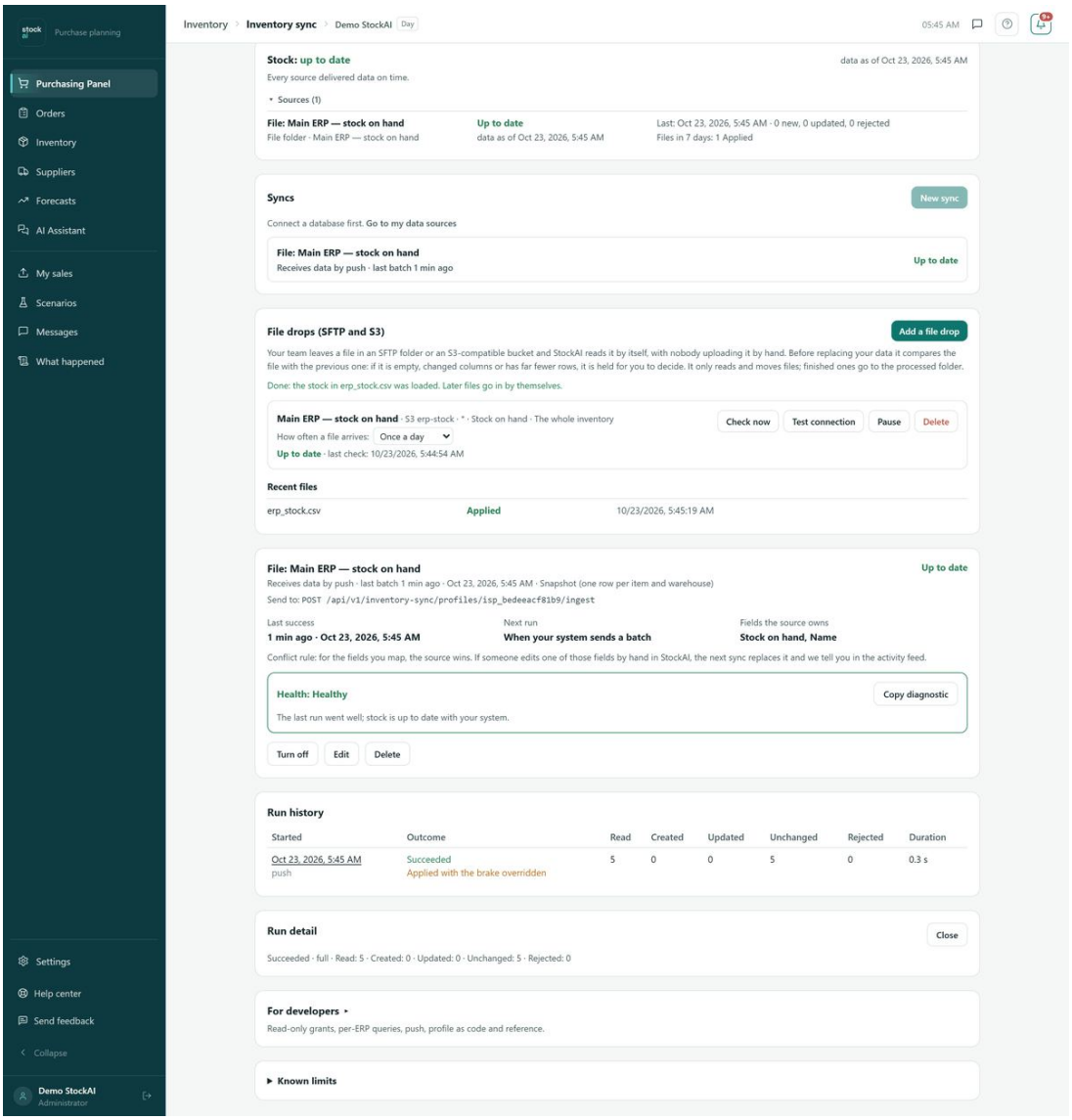
Last success / Next run	When it last finished well and when it runs again (“Not scheduled (off)” when off).
Fields the source owns	The fields this sync brings. Conflict rule: the source wins. If someone edits one of those fields by hand in StockAI, the next sync replaces it and the activity feed says so.

Health	Not run yet, Healthy, Degraded, Paused or Blocked, with the reason and “What to do:”. “Check connection” opens the doctor and “Copy diagnostic” copies a password-free summary for support.
Preview (dry run)	Reads the source and says what would be created, updated, left unchanged, rejected or filtered out, and whether the brake would stop it. It writes nothing.
Turn on / Turn off	A new or edited sync stays off until its preview has been reviewed.
Sync now	Runs once right away. The outcome shows up in the history.
Edit / Delete	Delete removes the sync and its history; your inventory stays exactly as it is.

If the safety brake stopped the last run you see “The safety brake stopped the last sync” with the reason: nothing changed. If the change is real (you closed a warehouse, cleaned up the catalogue), “Apply anyway, once” runs once without the brake and records who did it.

Run history and detail

Each run with Started (and what triggered it), Outcome (Succeeded, Failed, Braked, Running), Read, Created, Updated, Unchanged, Rejected and Duration; below, manual edits replaced and products no longer in the source. A click on the date opens the “Run detail”: a failure's reason with what to do and whether it retries on its own, warnings, the rejected rows with their reason and “Download rejected rows (CSV)”.



The history and a run's detail.

The connection doctor

“Check connection” tests step by step (network, access, permissions, reading, change capture) and says at which step it fails, with what to do. It ends in “Everything is in order (N ms)” or “It fails at: …”. “Copy diagnostic” and “Copy JSON” give you something to send to support: it contains no passwords and none of your product data.

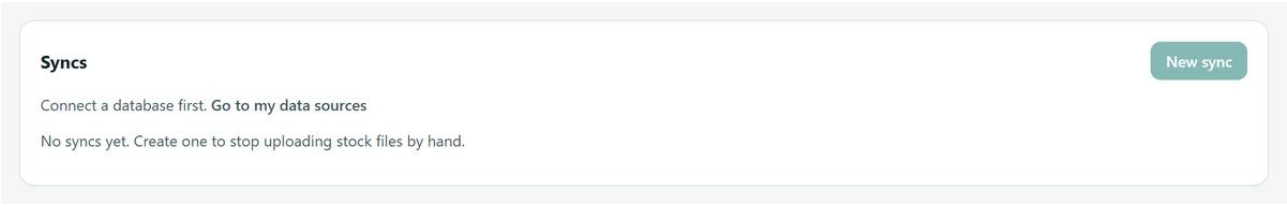
A NEW SYNC FROM A DATABASE

You need a database connected under Files › data sources (see SQL sources). Press “New sync” and follow four steps:

1. Database	Name and Database. If it is not connected, the screen says so.
2. What to read	A table or view (the ones that look most like stock are highlighted), A query (read-only), A collection or An aggregation (MongoDB), or Your system sends the data (push). ERP recipes fill in a query tested for your system. With a query or collection, “Read columns”.

3. Columns	We propose which column is each field with a confidence (high, medium, low) and sample values: you confirm. Each field has Transforms: Multiply by (boxes of 12 → 12), how to read numbers written as text, letter case, value when empty and translate values (01=North). Filters: only rows that pass them are synced.
Warehouses and suppliers from your system	What to do when a row names a warehouse StockAI does not have (create it, reject the row or book it to the default warehouse) and, optionally, a warehouse master table and a supplier master table. A warehouse is never deleted.
4. Schedule and rules	How stock is computed (Snapshot, Sum of several rows or Movement ledger), How fresh (Scheduled, Continuous or On demand only), How to detect changes, Priority, API key name (slug), How to read (everything or incremental), Every how many minutes, what to do when a product disappears (do nothing, recommended; flag it as missing; or set it to 0), negative stock, duplicates, Warehouse when the row has none, Create new warehouses and the Safety brake (max % of products that may vanish, min rows vs. last time, max % of rejected rows, largest quantity jump).

1. Fill in the four steps.
2. Press “Preview (dry run)” to see what would happen.
3. Press “Save and preview”. Saving syncs nothing: it stays off.
4. Review the preview of what you saved and press Turn on.



With no database connected, “New sync” stays disabled.

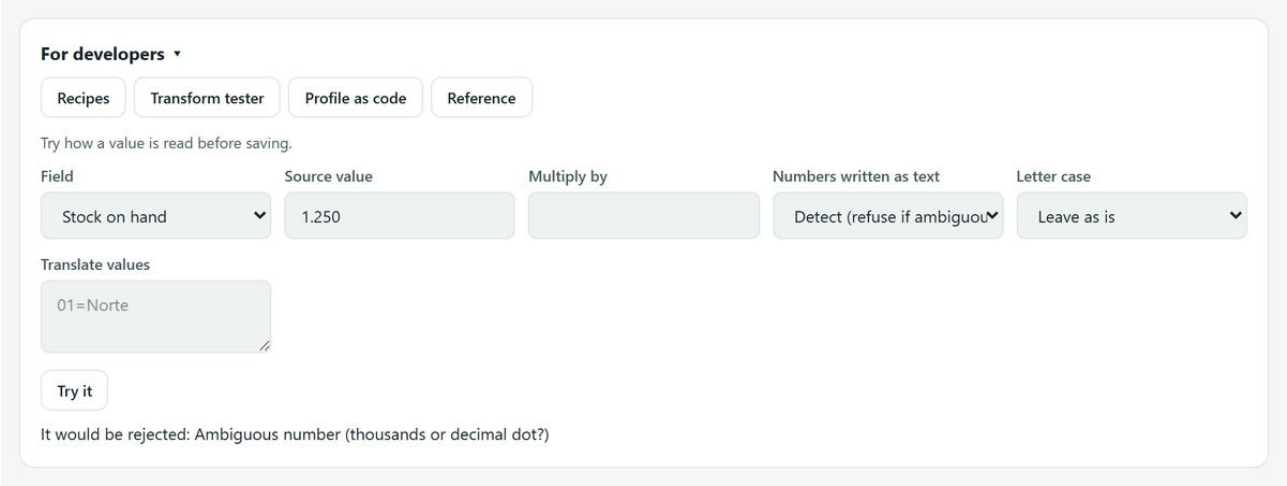
> Push
>
> With “Your system sends the data (push)” there is nothing to read: you type each field's name in what your system sends and, after saving, your system sends a test batch with `dry_run=true` to POST `/api/v1/inventory-sync/profiles/{id}/ingest`. Then you can turn it on. See Sync and files through the API.

FOR DEVELOPERS

A folding panel (analyst or administrator) with four tabs:

Recipes	Read-only grants ready to copy per engine, an example view, queries for known ERPs and push examples from other systems, with the IP addresses StockAI connects from.
Transform tester	Pick a field, type a value (for example 1.250) and try the multiplier, the decimal format, the letter case and value translation without touching anything.
Profile as code	The selected sync as JSON: Validate, test without applying, Apply, copy and open the schema.

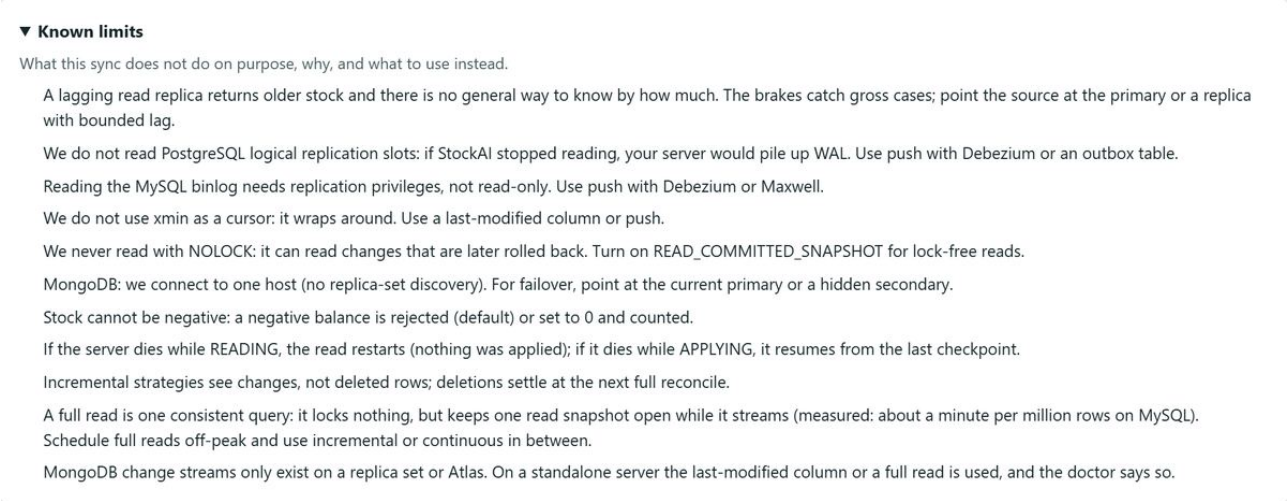
Reference	Explains modes, freshness, models, the movement ledger, the brake, conflicts, idempotency, transforms, push and limits.



“For developers” › “Transform tester”.

KNOWN LIMITS

At the bottom, “Known limits” lists what the sync does not do on purpose and what to use instead; for example: it does not read the PostgreSQL replication log or the MySQL binlog (use push with Debezium), it never reads with NOLOCK on SQL Server, a lagging replica returns old stock, incremental strategies do not see deleted rows until the next full reconcile, and stock is never left negative.



“Known limits”.

Data and forecasts

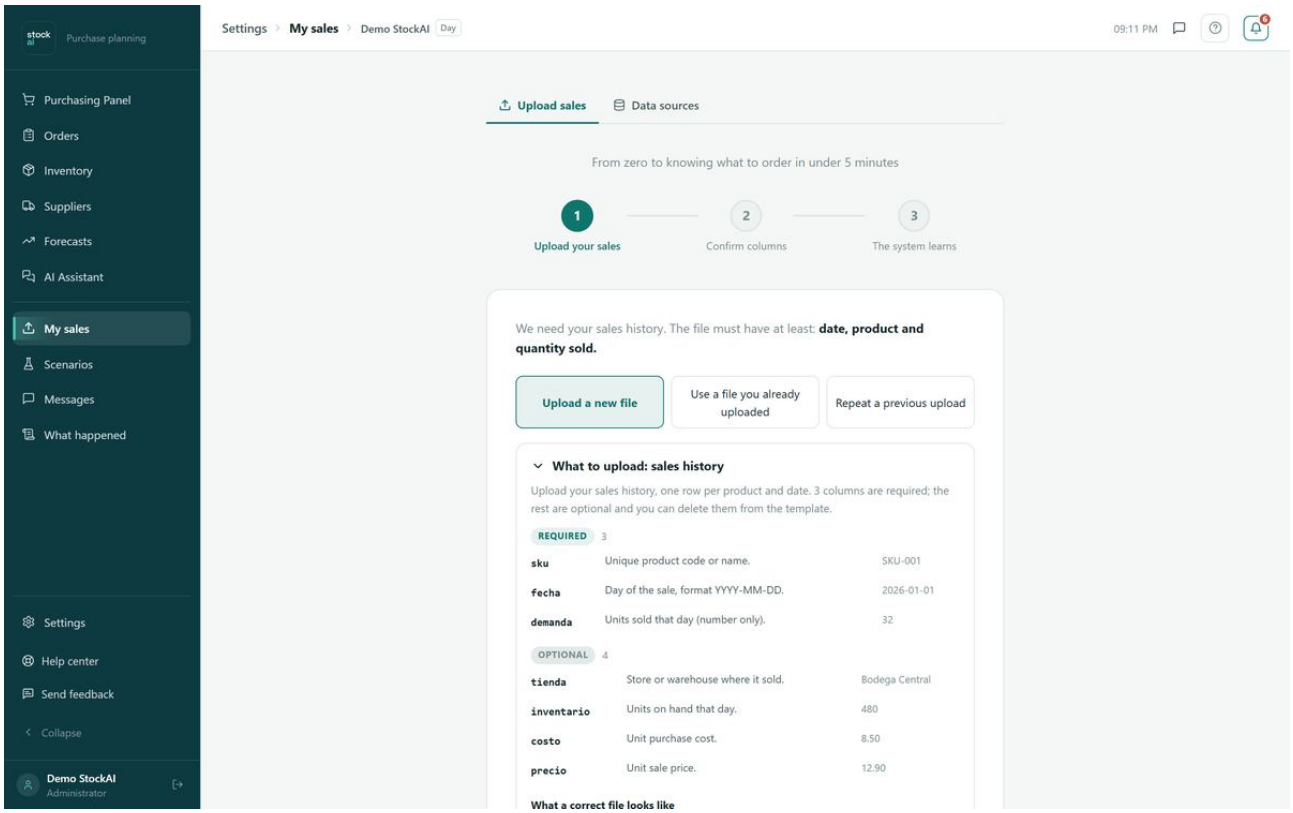
Loading sales and files, forecasts, accuracy, scenarios, impact, history, demand plan, consensus and the assistant.

Upload sales and calculate the forecast

The three-step wizard that turns your sales history into forecasts: upload the file (or reuse one), confirm which column is which, and StockAI trains the models and takes you to the result.

Upload sales is where every forecast starts. It shares a tab strip with Data sources. At the top, the step bar: 1. Upload your sales, 2. Confirm columns and 3. The system learns. When it finishes, the app opens Forecasts on the new run, which becomes the one the app plans from.

> Who can use it
>
> Uploading sales and training are for analysts and admins; a read-only user is told their role cannot do it. Your plan sets how many trainings you can run per day: the screen says so next to the button (“You have N of M trainings left today.”).



Step 1: choose where the sales come from.

THE FILE YOU NEED

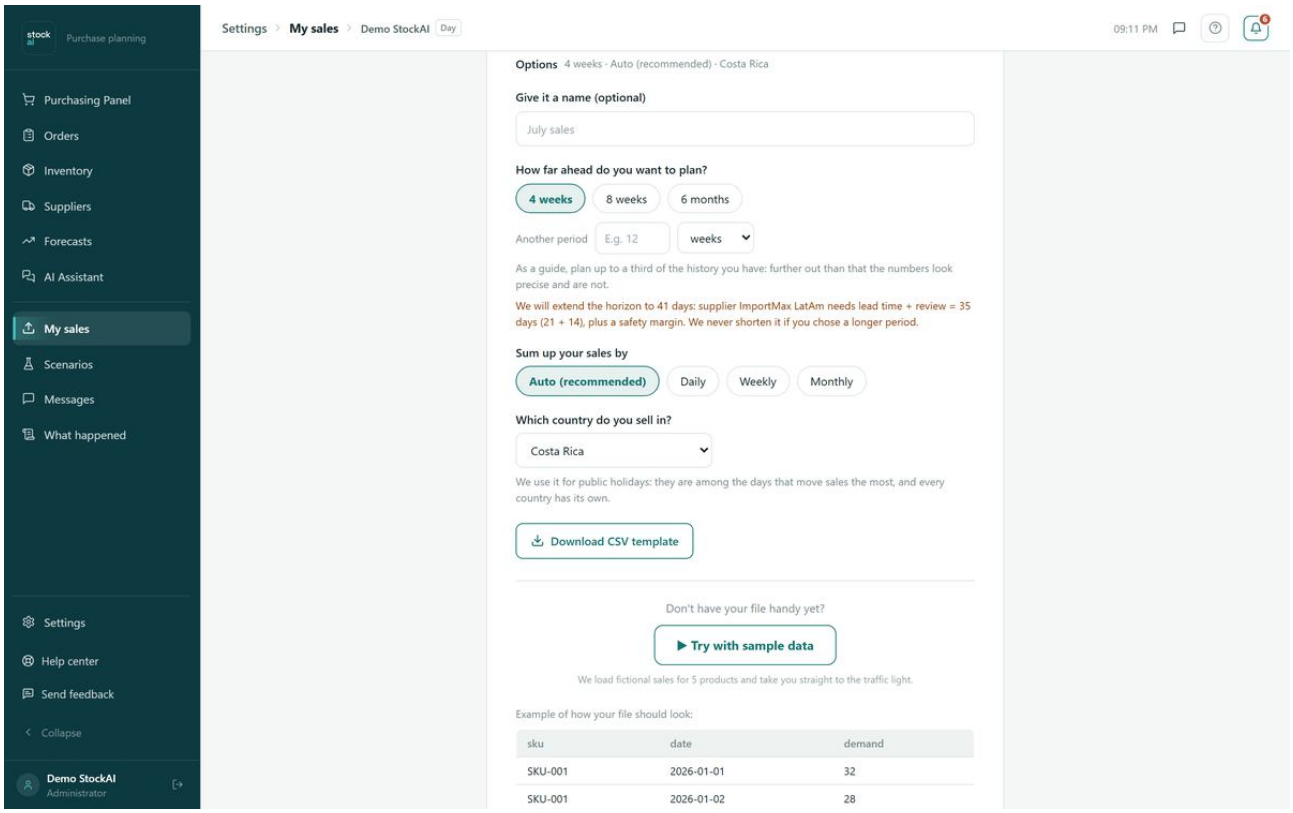
A CSV or Excel file (.xlsx, .xls) with at least date, product and quantity sold, one row per product and date. The screen’s guide shows the Required and Optional columns, “What a correct file looks like”, the “Before uploading, check that…” list and the Download CSV template and Download Excel template (.xlsx) buttons. An example of how it should look sits at the bottom.

Before uploading, the browser checks the CSV and tells you row by row what it finds (“row 214: invalid date…”), with the template at hand to fix it.

STEP 1: UPLOAD YOUR SALES

If you already have data, up to three tabs appear at the top:

Upload a new file	Drag the file onto the zone or click to choose it. You will see “File selected: …”.
Use a file you already uploaded	Pick one of your files (with its rows and upload date) and click Use: no need to upload it again.
Repeat a previous upload	Runs the numbers again with the same file and columns as a finished run; click Repeat. You only change the horizon or detail in Options.



Options: the summary next to the title shows what is chosen.

Expand Options (next to the title you see the current choice, for example “8 weeks · Auto (recommended) · Costa Rica”) to set:

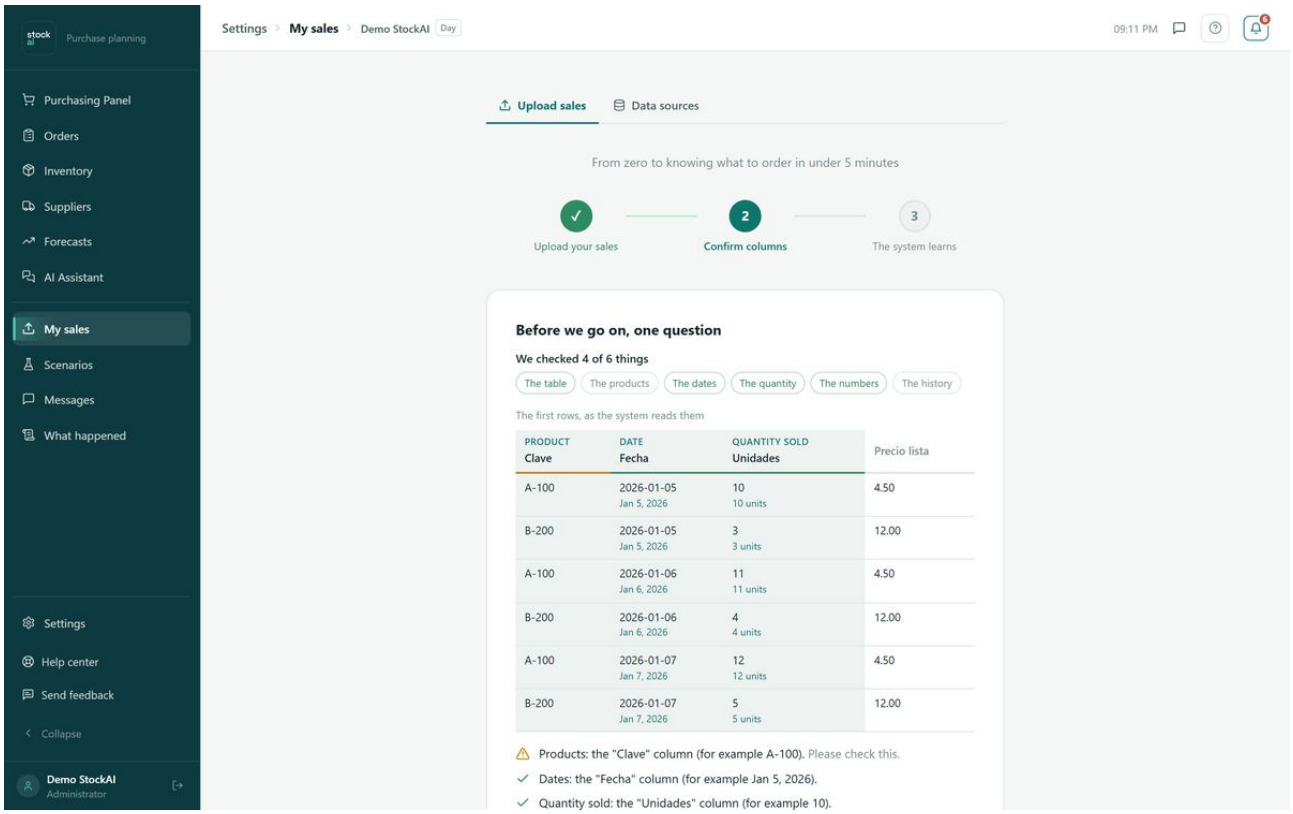
Give it a name (optional)	The run’s name, for example “July sales”.
How far ahead do you want to plan?	4 weeks, 8 weeks, 6 months or Another period (a number of days, weeks or months; 365 days at most). As a guide, plan up to a third of the history you have. Each detail level has a reach: daily goes to 90 days, weekly to 26 weeks and monthly to 12 months; if you ask for more, the screen says how far it will go. If a supplier’s or product’s lead time requires it, StockAI extends the horizon and says so; it never shortens it.
Sum up your sales by	Auto (recommended), Daily, Weekly or Monthly.

Which country do you sell in?	Costa Rica, Colombia, Mexico, Peru, Chile, Argentina, Ecuador, Guatemala, Panama, Dominican Republic, Spain or United States. It is used for public holidays, which are among the days that move sales the most.

When you upload (or pick) a file, StockAI reads it. If it recognises the three required columns with certainty, it jumps straight to step 3 and tells you which ones it used (“We recognised the columns of your file: product…, date… and quantity sold…”) with the “Change columns” link to go back. Otherwise it takes you to step 2.

> The sample data button
>
> “▶ Try with sample data” loads fictional sales for 5 products and trains on them to show you the stock signals. It uses one of your daily trainings and the run stays in your account. Use it only to get to know the app.

STEP 2: CONFIRM COLUMNS



Step 2: StockAI says how it read your file and asks what it does not know.

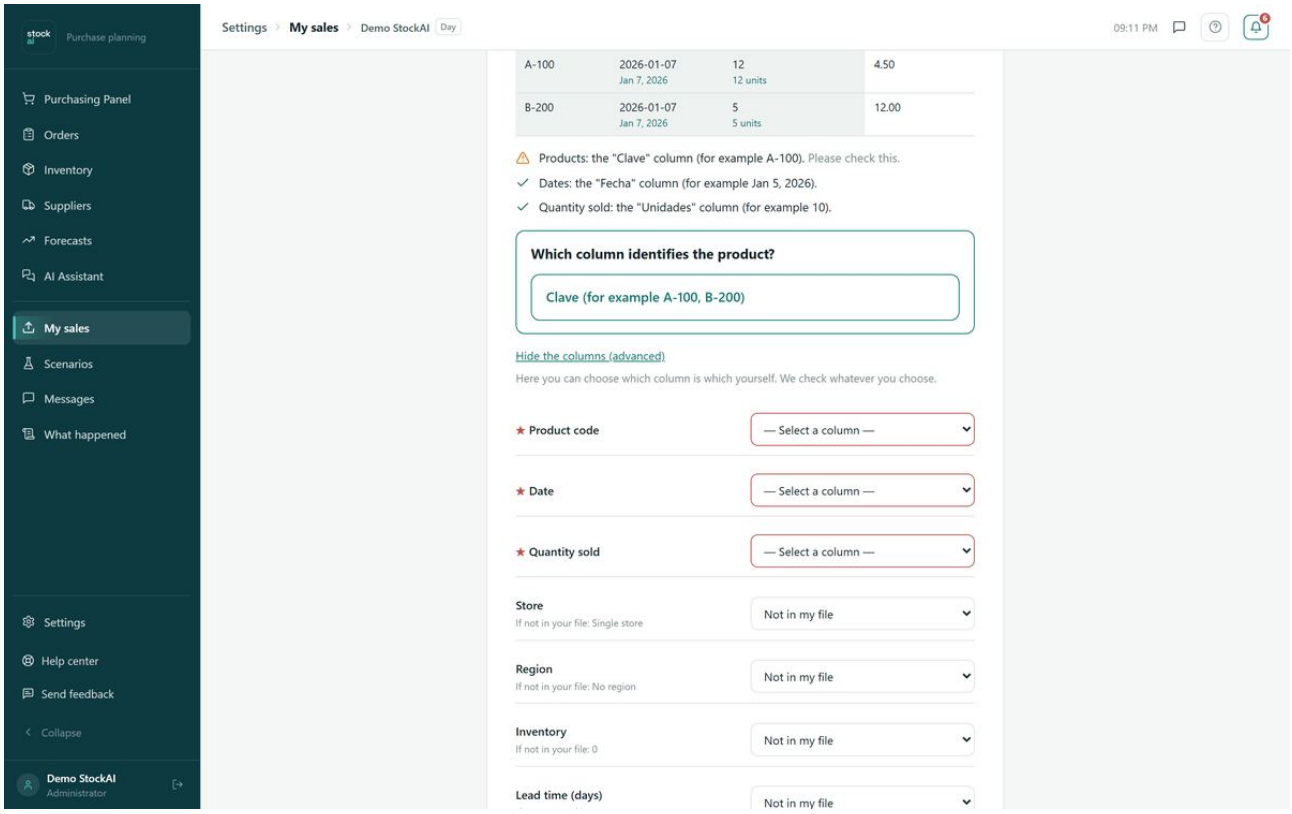
StockAI shows how it read the file: “We read N products, N days, from … to …”, “We checked N of M things”, the first rows as the system reads them, and one question per doubt (for example which column holds the units, or which sheet of an Excel file to use). What it fixed on its own appears under “What we did for you”: title or total rows ignored, Excel dates converted, decimal commas, leading zeros in codes, period columns turned into rows, among others. “Use my file exactly as it is” undoes those fixes.

“Show all columns (advanced)” opens the full list so you choose which column is which yourself:

★ Product code, ★ Date, ★ Quantity sold	Required (starred, and outlined in red while missing).

Store, Region	If missing: a single store, no region.
Inventory	The stock in the file; if missing, 0.
Lead time (days)	If missing, 15 days.
Price, Cost, Regular price	If missing: unknown.
Promo price, Promotion, Promotion type, Discount	If missing: same as the regular price, no promotion, 0%.

Every optional column can stay on “Not in my file”. If it is your usual monthly upload, StockAI reuses the previous run’s columns and says so; if the file changed format, it names the columns it no longer has.



The advanced list: one dropdown per field.

Problems in the data

Below, the problems the system found. Those that only inform are shown as notices; those that change the forecast go under “There is something you have to decide first”, with options and the recommended one marked (for example, what to do with repeated dates with different quantities, or with negative returns). While answers are missing, the button says why it is off: “You still have N question(s) above to answer.”

1. Review the reading and answer the questions.
2. If a column is wrong, fix it in the advanced list: the file is checked again.
3. Answer the points under “There is something you have to decide first”.
4. Click “This looks good, continue →”.

> When the file cannot be used

If the file lacks something that cannot be fixed, you see “We cannot use this file yet” and the “Upload another file” button, with the hint “Did we read a column wrong? Fix it above and we will check the file again.” There is no “continue anyway”: training on misread columns would learn a history that never happened. If you ask for a horizon longer than a third of your history, a notice says so, but you can carry on.

STEP 3: THE SYSTEM LEARNS

StockAI sets up the rest of the calculation on its own and trains. The progress bar names each stage: loading the file, filling in days with no records, reviewing unusual sales and data quality, picking the best method per product, training, measuring accuracy, working out demand for the coming days and how much to order, and saving. If the file carries inventory, it also updates your stock. Do not close the tab while it says “This may take a few minutes...”.

What is configured automatically:

Part	What is used
Columns	The ones you confirmed in step 2.
Features	Sales 1, 7, 14 and 28 periods back, moving averages over 7, 14 and 28, exponential averages over 7 and 14, the change from the previous period, calendar and the chosen country’s holidays.
Models	A global model that learns from all your products, LightGBM, Prophet, Croston (for intermittent sales) and XGBoost. The system picks the right ones per product.
Validation	Testing over time (walk-forward) with 3 splits, 80% for training and at least 20 records of history.
Forecast	The horizon and detail from Options. The period views are computed (for example daily and weekly); you are taken to the result as soon as the first one is ready and the rest continues in the background.
Business	Service level 95%, lead time 15 days, holding cost 20%, and running out costs 3 times more than having spare. Later, set the real values per product and supplier in Inventory and Suppliers.

If the calculation fails you see “The calculation failed:” with the reason and the “Try again” button, which reuses the file already uploaded.

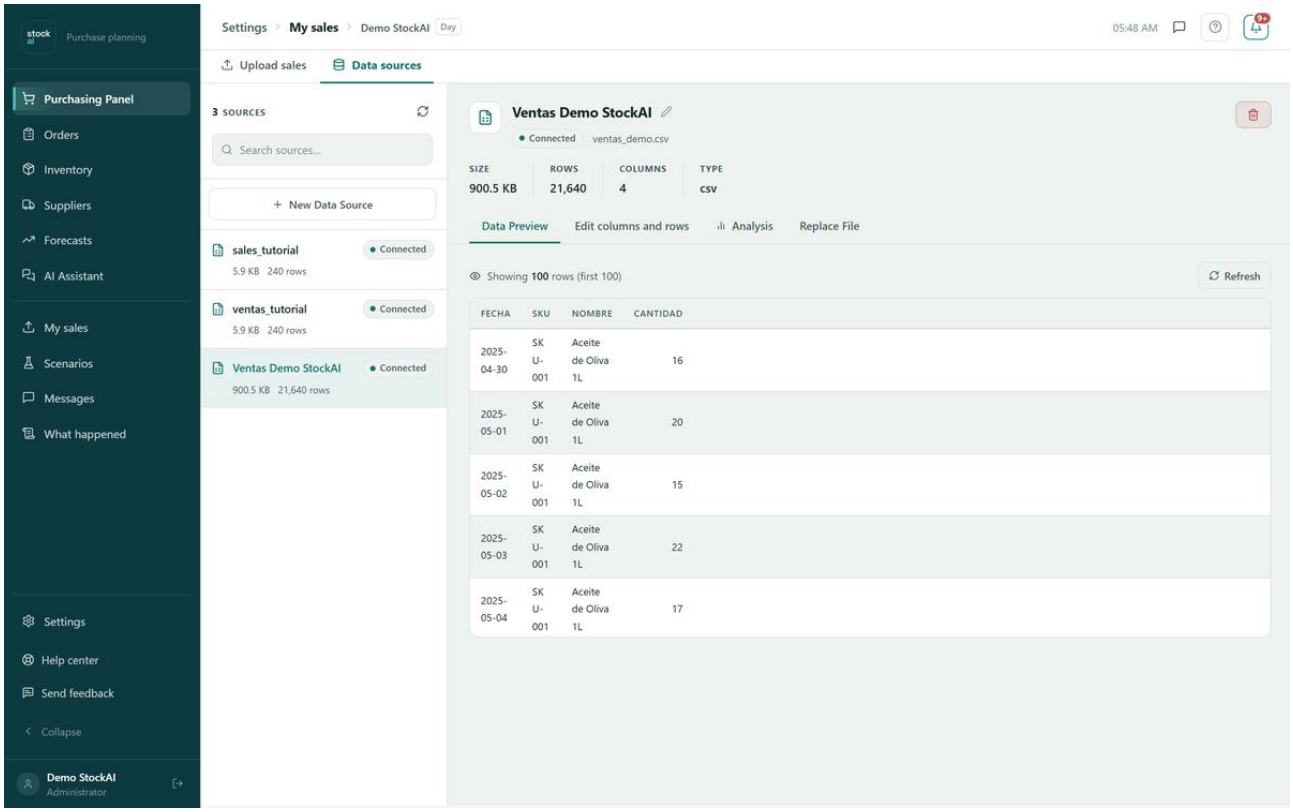
RELATED

- Upload your sales: the short version to get started.
- Granularity and How the models compete.
- File rejected: what to do when a file does not pass.
- History: every run you calculated.

Data sources

All your files and database connections in one place: upload them, review their rows, analyse each product, edit columns and rows in a copy, replace a file, or query your database with read-only SQL.

Data sources is the library of your data. It shares a tab strip with Upload sales (My sales): there you train a forecast; here you keep, review and prepare the data. The list of sources is on the left; the open source on the right.



The list of sources and a file open on Data Preview.

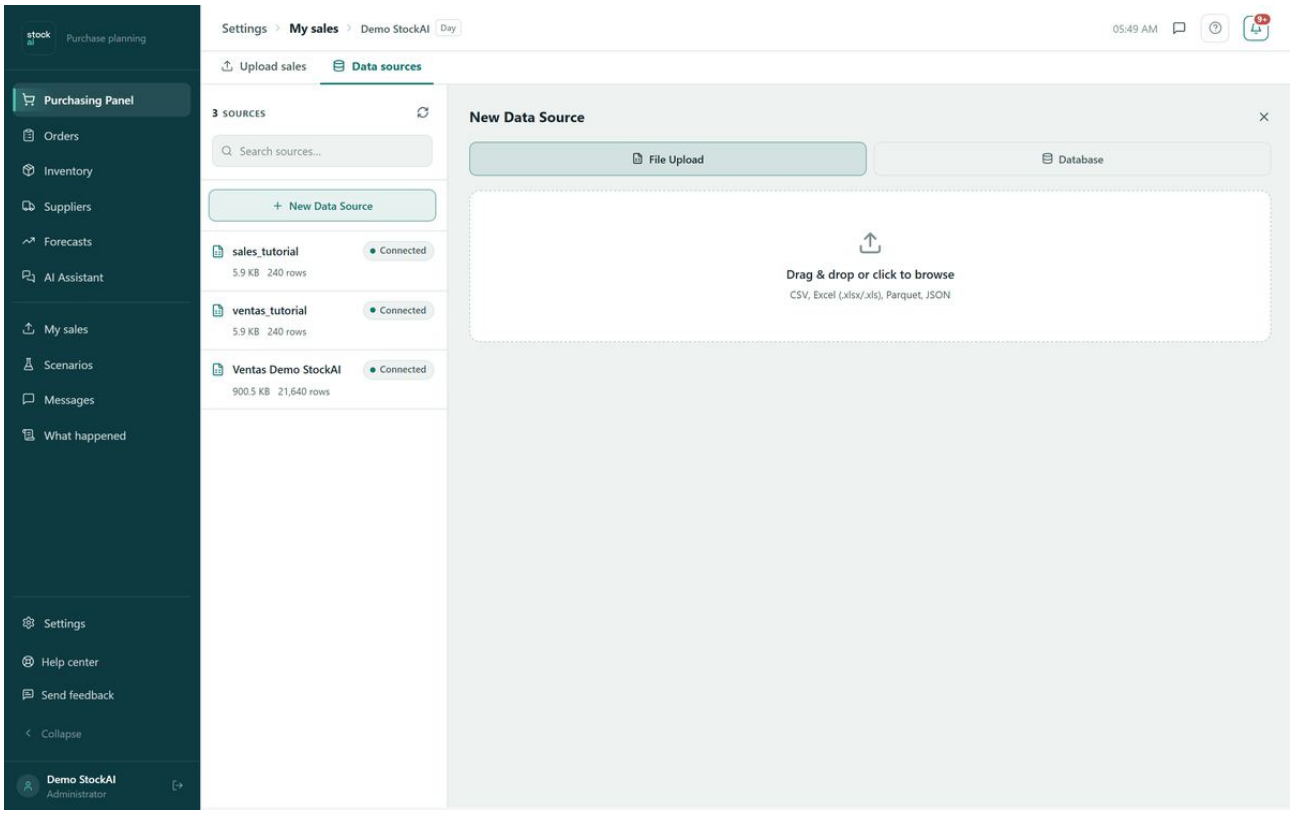
> Who can do what
>
> Every role sees the sources, their preview and their analysis. Uploading, renaming, replacing, editing, deleting, testing connections and writing SQL queries are for analysts and admins; a read-only user who opens the SQL editor sees “Writing and running queries on the company database is for analysts and administrators…”.

THE LIST OF SOURCES

N sources	How many sources you have. The arrows button (Refresh) reloads the list.
Search sources…	Filters by name or description.
New Data Source	Opens the form to upload a file or connect a database.
Each source	Type icon (file or database), name, status (Connected, Pending or Error), the description, and the size or the engine and host, with the rows.

With no sources you see “No data sources yet”; with none selected, the right side says “No source selected”.

UPLOAD A FILE



New Data Source: a file or a database.

1. Click “New Data Source” and keep “File Upload” selected.
2. Drag the file onto the zone or click to browse. Formats: CSV, Excel (.xlsx/.xls), Parquet and JSON.
3. Optionally type a Name (optional) (the file’s name by default) and a Description (optional). The X next to the file removes it.
4. Click “Upload File”. The new source appears first in the list and opens.

CONNECT A DATABASE

With “Database” the form asks for Source Name, Description, Engine (PostgreSQL, MySQL / MariaDB, SQL Server, Oracle or MongoDB), Host, Port, Database, Username and Password. Click “Create Connection”: StockAI tests it right away, so the source opens saying whether it works and, if not, at which step it failed. The full guide is in SQL sources.

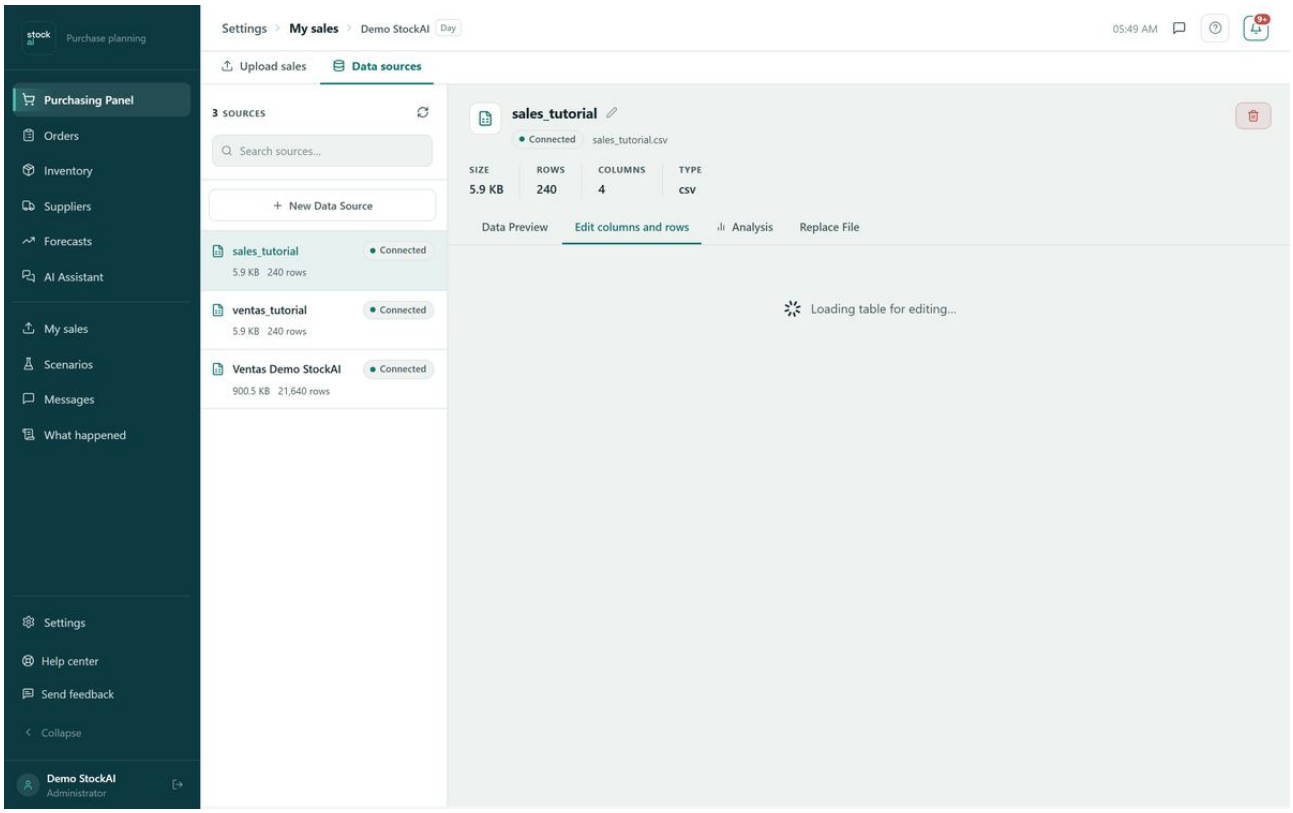
AN OPEN FILE

At the top: the name (the pencil renames it; Enter saves, Escape cancels), the status and the original file name, and the trash can to delete. Below, Size, Rows, Columns and Type. A file has four tabs:

Data Preview	The first 100 rows (“Showing N rows (first 100)”). In an Excel file with several sheets, one button per sheet. Refresh reads it again.
Edit columns and rows	An editable table (see below).

Analysis	A statistical analysis per product (see below).
Replace File	Upload a new file in place of the current one: “The name and ID stay the same.”

Edit columns and rows

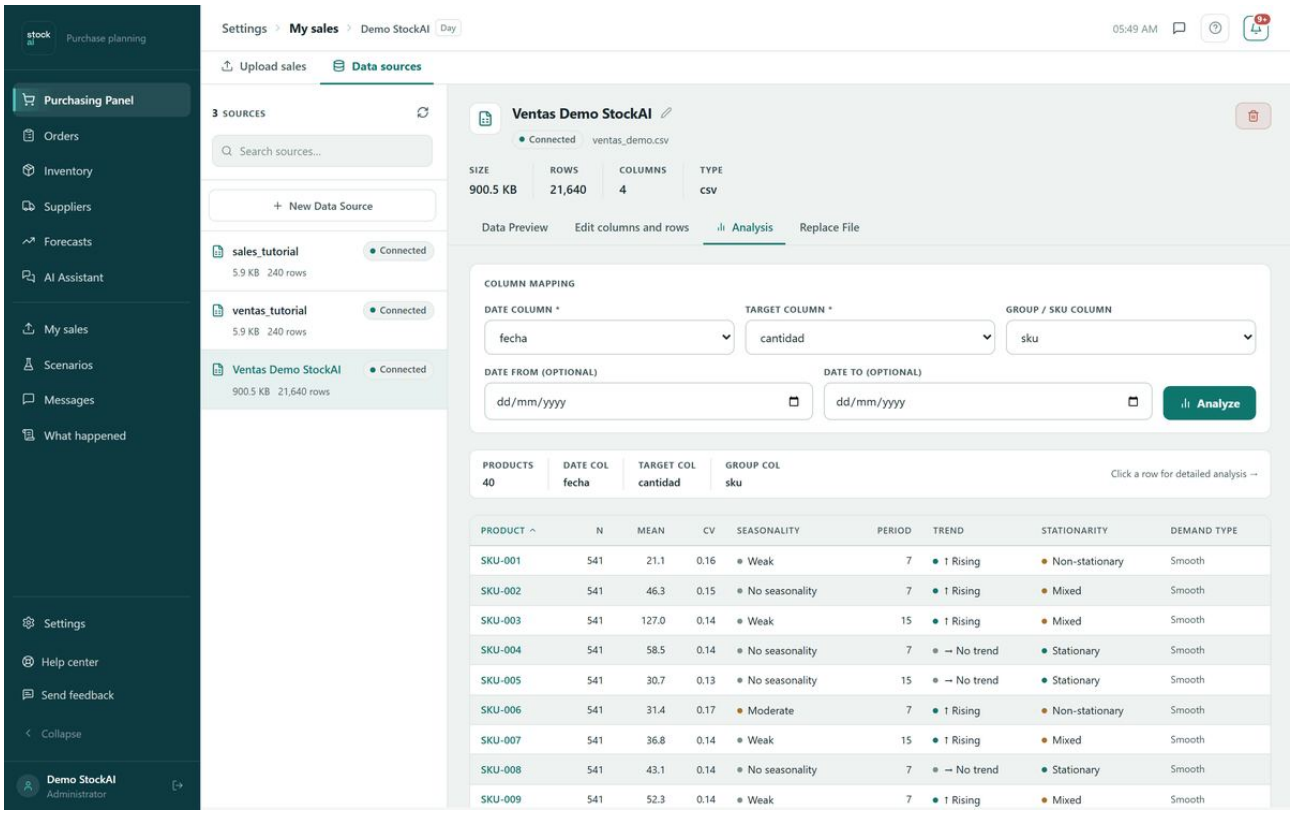


Whatever you edit is saved as a new file; the original does not change.

1. Open “Edit columns and rows”. Type over any cell to change it.
2. Use Add row, Delete row, Rename column, Drop column or New column as needed.
3. Type the New file name (by default “{name} (edited)”).
4. Click “Save as new”. You will see “Saved as a new file” and the copy opens in the list.

> The original is never touched
>
> Editing never changes the source file: it always creates a new one. If the file is too large to edit in the browser, the tab says so: edit it offline and upload it again.

Analysis



A summary per product; click a row for the details.

1. In Column Mapping pick the Date Column, the Target Column (what sold) and the Group / SKU Column (“None (single series)” if the file is one product). StockAI suggests the ones it recognises.
2. Optionally narrow the dates with Date From (optional) and Date To (optional).
3. Click “Analyze”. Large files take a moment.
4. Read the per-product table (observations, mean, variability, trend and direction, seasonality, stationarity and demand type) and click a row.

A product’s details include the Time Series with its outliers (show or hide them, with date, value, z-score and reason), the Distribution, Seasonality, Trend and Stationarity panels, the STL Decomposition (trend, seasonality and residual), the Autocorrelation and the Demand Classification (for example intermittent or erratic, with its ADI and CV^2). Back returns to the table. It is a diagnosis: it changes nothing in the file.

Replace and delete

1. To replace, open “Replace File” and drop the new file. While it uploads it says “Replacing file…”, then the preview reloads.
2. To delete, click the trash can and confirm “Delete "…"? This cannot be undone.”

> A file a forecast used is not deleted
>
> If any run (even an archived one) was trained on that source, deleting it is refused with “Cannot delete: this data source is used by N session(s)…”: runs are kept permanently with their data. When you replace a file, the previous one is not erased: it is kept aside.

AN OPEN DATABASE

At the top is “Test Connection”: it shows the result stage by stage, so a failure always says where it happened, and it updates the source’s status. There are two tabs (a MongoDB source only has Connection: inventory sync reads it):

Query Editor	Write a SELECT and click Run: you see the rows page by page, how long it took and whether there are more. Save Query keeps it as the source’s query. Download Excel and Export CSV download the full result. Use as dataset stores the full result as a file to train on, which appears in My sales. The schema button shows or hides tables and columns. Until the connection is established, the tab asks you to test it first.
Connection	Change the connection details (leave the password blank to keep it) and click Save Changes: it is tested immediately. Inventory sync is also linked from here.

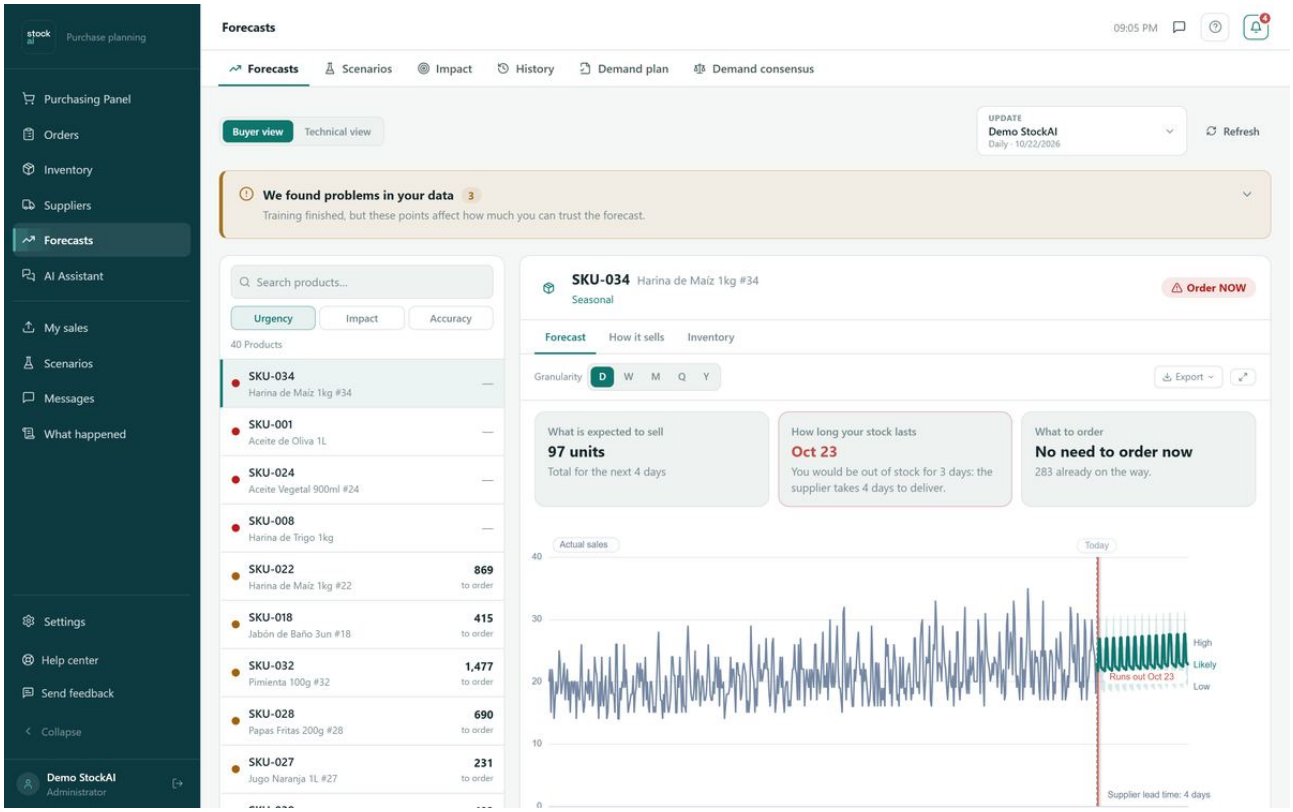
> Read-only
>
> StockAI connects to your database only to read: it never creates, changes or deletes anything in it. The source’s columns are the ones you put in the SELECT; to edit by hand, work on an uploaded file.

When the source is ready, train it from My sales. If a file is rejected, see File rejected.

Forecasts

Each product’s forecast: how much is expected to sell, how long your stock lasts and what to order, in the buyer view; and the models, their errors, data quality and the comparison between runs, in the technical view.

Forecasts shows a run’s result product by product: the list on the left, the chosen product with its chart and tabs on the right. On opening, it picks the run the app plans from (or the one in the link, if you come from History) and the most urgent product.



Buyer view: the list, the three answers and the chart.

> Who can use it
>
> Every role sees forecasts and exports. Excluding one-off periods and “Update with the new sales” are for analysts and admins.

THE TOP BAR

Buyer view / Technical view	The main switch. The buyer view shows what helps you buy; the technical one adds models, metrics, quality and comparison. The screen remembers your choice, and `?view=tech` in the link opens the technical one.
Forecast vs. reality	Link to Forecast vs. reality (technical view).
Export all products	Technical view: an Excel file with one sheet per product (date, history, forecast and range). It shows progress “N / M Products…” and, if any fail, how many.

Compare	Technical view, with at least two finished runs: compares runs on the same chart (see below).
Update:	The run picker. Back-tests carry their tag; they are never picked automatically.
Refresh	Reloads the open run’s data.

Two notices may appear below: “Update with the new sales” when you have uploaded sales newer than the forecast (it creates a new forecast with the same models, without retraining them, and leaves this one untouched), and the collapsed panel with the run’s warnings (problems the engine found in your data while training).

THE PRODUCT LIST

Search products…	By code or name. The header says “N of M products”.
Sort products by	Urgency (what needs ordering first), Impact (quantity to order times cost) or Accuracy.
Each row	Code and name, the signal, the quantity “to order” (or “Nothing to order”), how often the model is right (“Right N% of the time”) and a mini curve of recent stock.

BUYER VIEW

At the top of the product: its code and name, the series type (for example intermittent or stable) and the signal. If the engine found problems in its data (short history, missing dates, outliers), they show right here. Below, three answers:

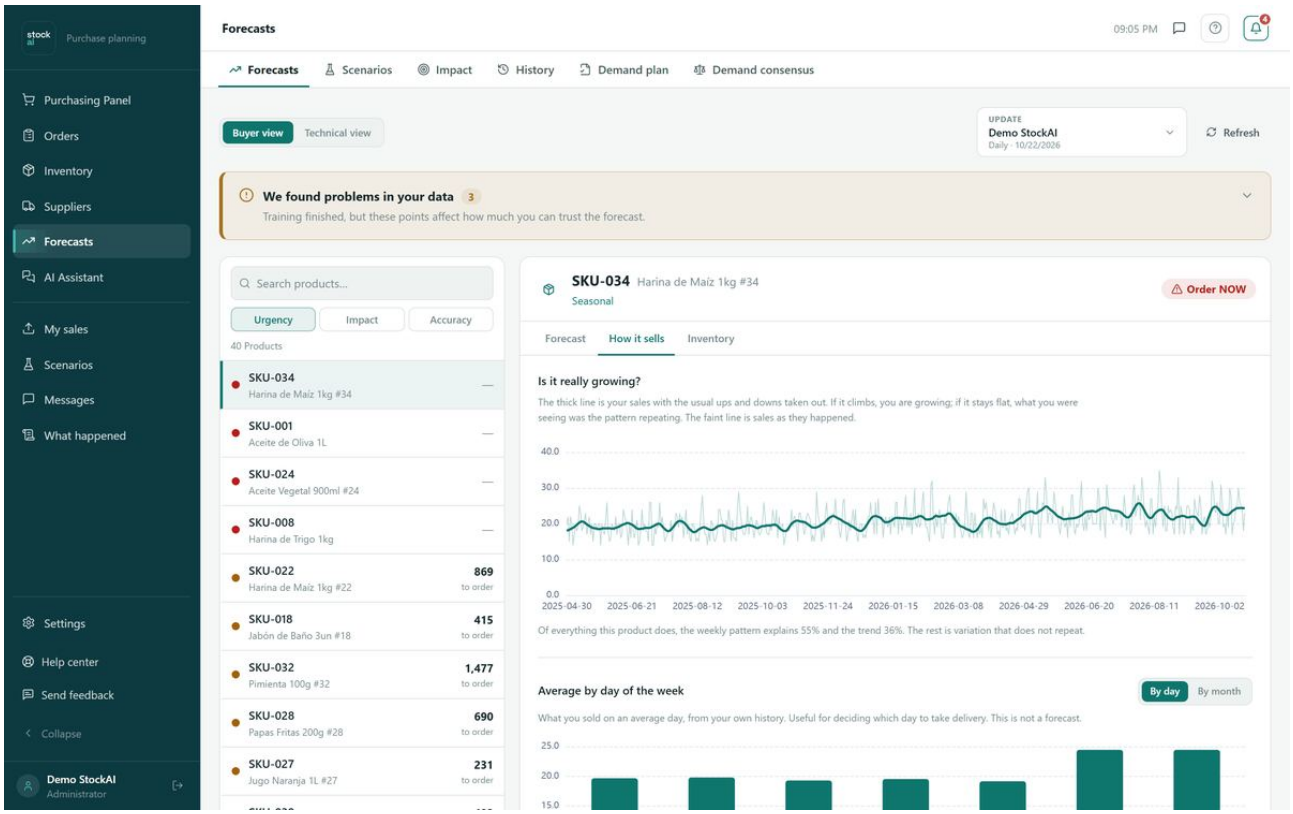
What is expected to sell	Total units for the coming periods.
How long your stock lasts	The date it runs out, and whether you would be out of stock for some days because the supplier takes longer to deliver. With no stock loaded: “No stock data. Load it in Inventory to see when it runs out.”
What to order	“Order N units” or “No need to order now”, how much is already on the way, and the “Place the order” link to Inventory.

The chart shows Actual sales, the Today line, the Likely forecast with its Low–High range, the day stock runs out and the supplier lead time. Hover to read each value. Below it, the confidence (high, medium or low), “Usually within ±N units per period” and the average error.

Above the chart: Granularity (the D, W, M, Q and Y buttons: view by day, week, month, quarter or year), Export (see below) and Fullscreen.

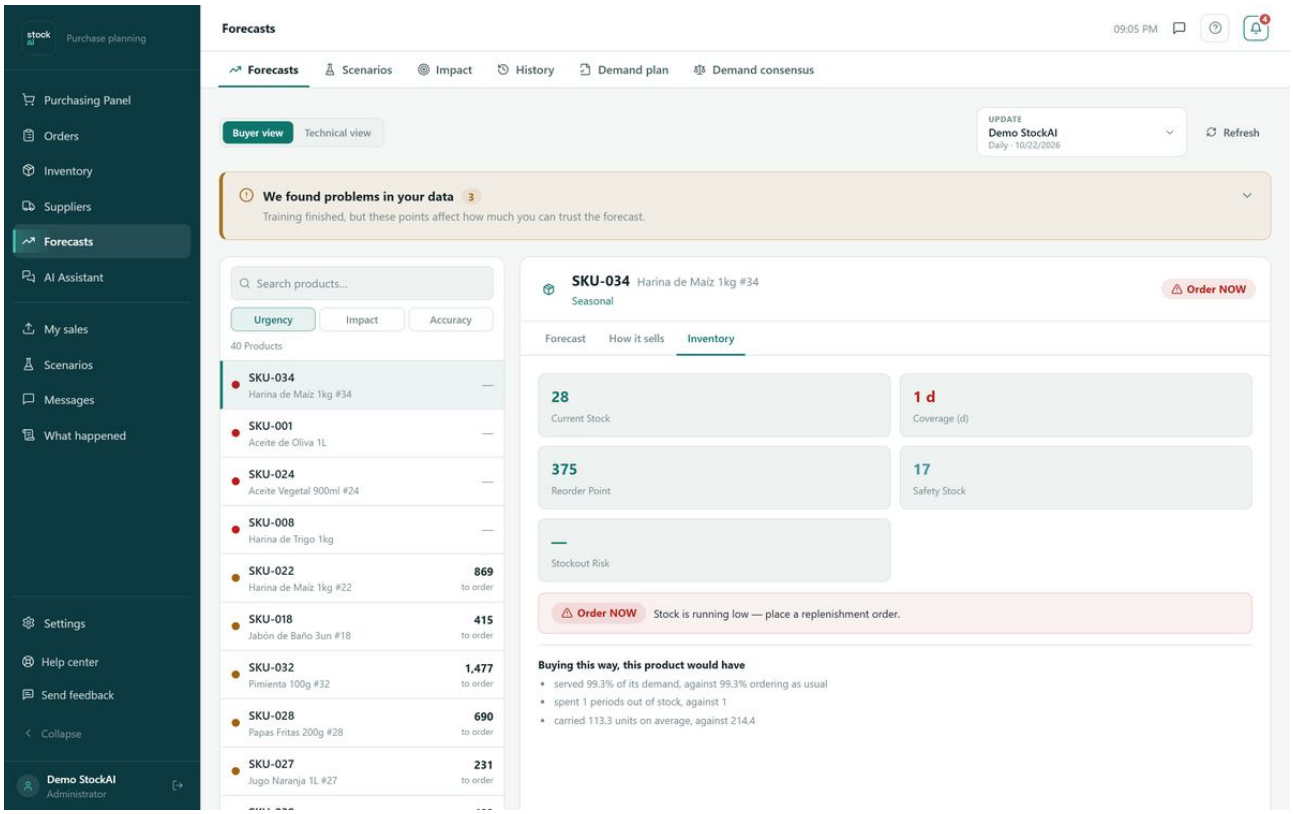
THE PRODUCT’S TABS

The buyer view has Forecast, How it sells and Inventory; the technical one adds Metrics and Quality.



How it sells: trend, weekly or monthly pattern and sales distribution.

How it sells	Is it really growing? (sales without the usual ups and downs: if it rises, you are growing), Average by day of the week or Average by month (By day / By month buttons; useful to decide which day to receive goods, not a prediction) and How much you sell per period (how your sales break down; the right tail is the peaks your stock has to absorb).
Inventory	The action message (order, order soon, overstock, all good or no data), Current stock, Coverage, Reorder point, Safety stock, Stockout risk and Holding cost. If the run computed it: “Buying this way, this product would have…” (demand served, periods out of stock and average inventory against ordering as usual) and where the safety cushion comes from.
Metrics	Technical view. Every model evaluated, with Type, MAE, RMSE, Average error, Bias, Folds and Cost (what getting it wrong would cost, counting that running out costs more than having spare: the column that picks the winner, tagged BEST). Shown as Table or Heatmap and exported to CSV or Excel.
Quality	Technical view. Quality score, Records, Outliers, Missing data and the series’ warnings; View expands the detailed statistical analysis.



Inventory: the recommendation and its numbers.

EXCLUDE A ONE-OFF PERIOD

Under the chart is “Excluded one-off periods”. It keeps a one-off order or a promotion that will not repeat from inflating the forecast.

1. Click “Exclude a period” (or “Exclude {date}” next to a detected outlier).
2. Pick From, To and the Reason: One-off order, Promotion that will not repeat, Catch-up after a stockout, Data error, External event or Other (with a required Detail).
3. Click “Exclude from the baseline”. The line is recorded with who and why; Undo removes it.

> Nothing retrains by itself
>
> The period is replaced by the typical value of its neighbours the next time you train or update the forecast; until then the line says “applies at the next training”. The original file does not change.

THE LIKELY RANGE

The "Likely range" button turns the uncertainty cloud around the forecast on and off. It is drawn as three nested rings:

Ring	What it covers
Wide range	The 5th to the 95th percentile of what could sell.
Likely range	The 10th to the 90th percentile. This is the one in the legend.
Middle zone	The 25th to the 75th percentile.

The range is not a textbook formula: it comes from the real errors the forecast made when we tested it on your own history. It is the same range the safety stock is computed from.

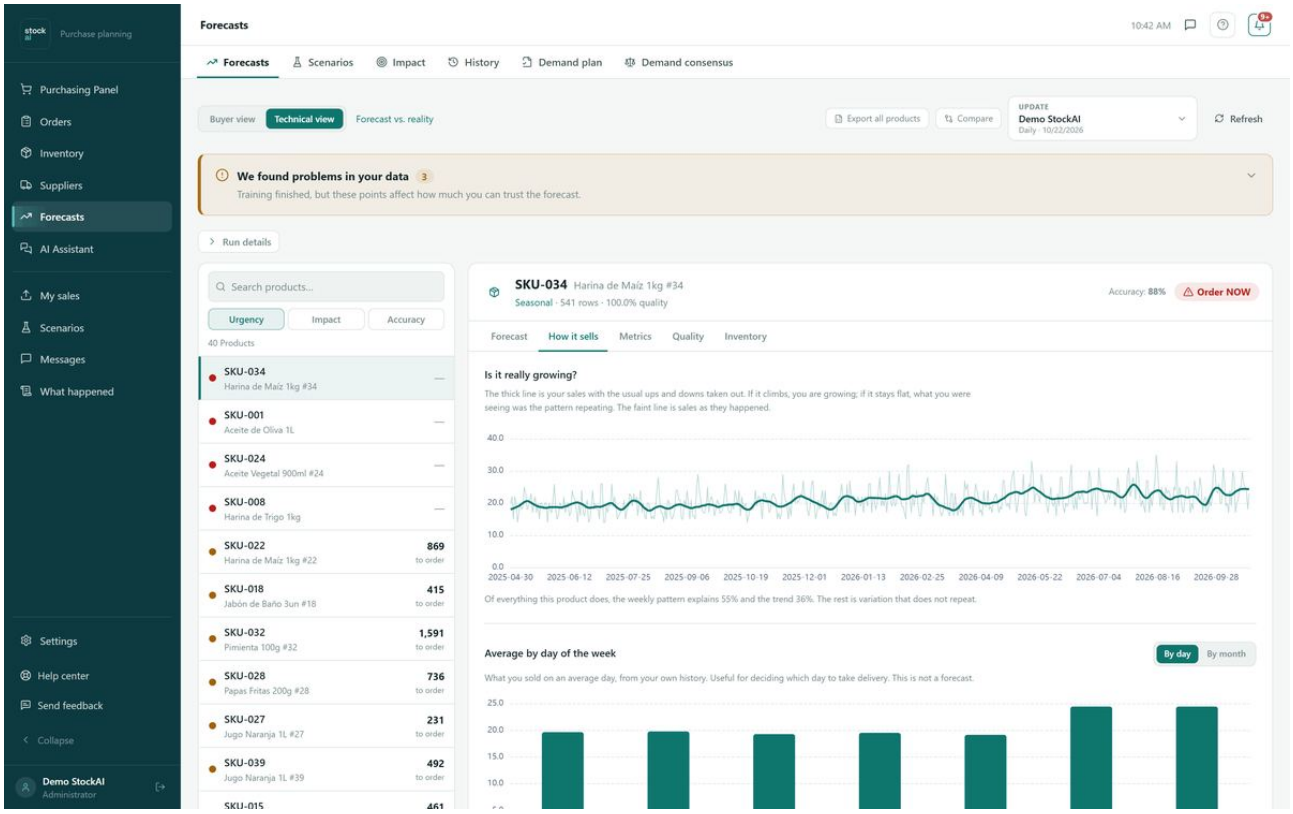
> If a model stored no range, the button stays off and reads "(no range)".

ACCURACY AND RELIABILITY ARE NOT THE SAME

Accuracy	How close the chosen model came when we tested it on data it did not see in training: one minus its error (WAPE), as a percentage.
Reliability	High, Medium or Low: how solid the data behind the forecast is. A short or irregular history lowers reliability even when test accuracy is good.
Sales range	The minimum and maximum you actually sold. Not a prediction: your history.

Read them together. High accuracy with low reliability means the model did well in a few tests on little history.

HOW IT SELLS



This tab looks at your history only; no model is involved. It answers three questions:

· "Is it really growing?": two lines, sales as they are and the same sales with the usual ups and downs removed. If the thick one rises, the growth is real.

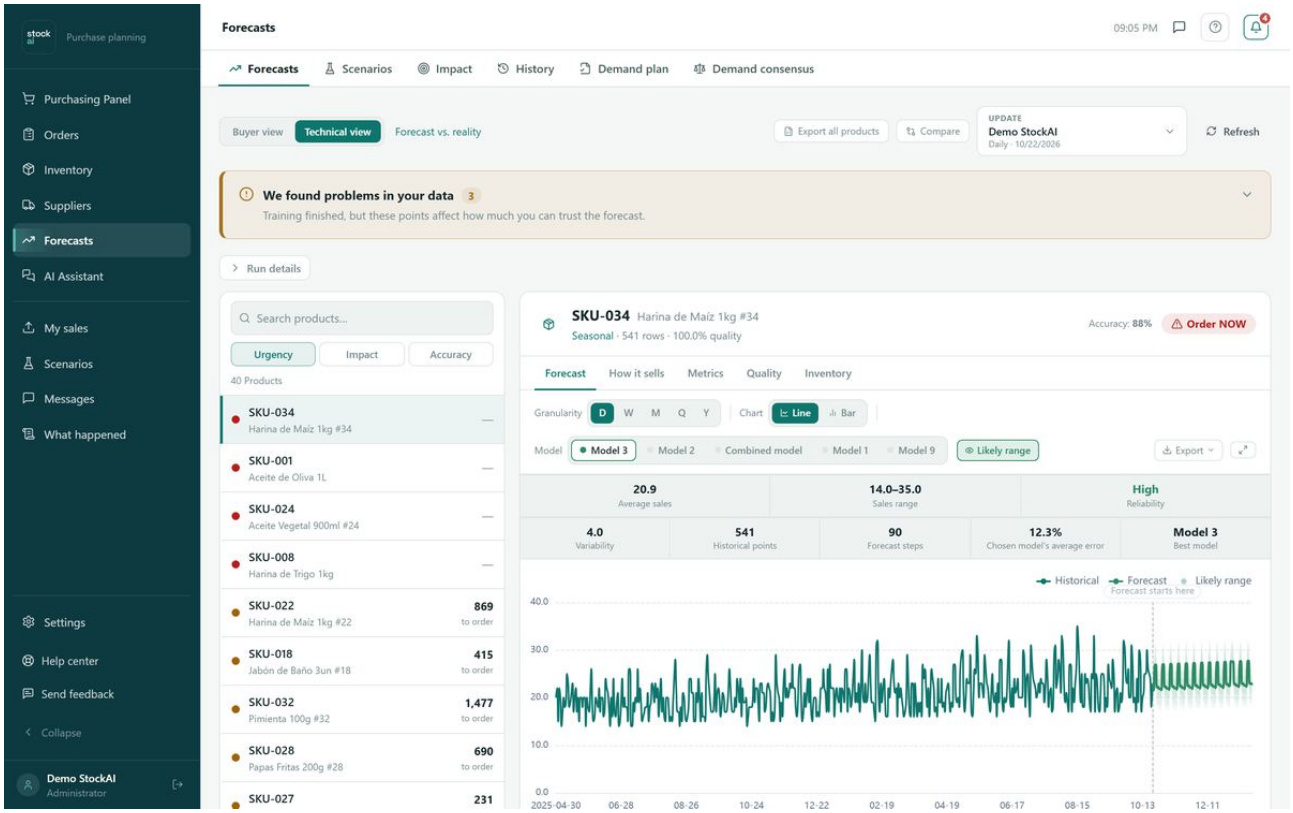
· By weekday or by month: the average sold each Monday, each Tuesday… or each month. It needs at least 8 weeks of history for weekdays and 12 months for months.

· How much you sell per period: how often you landed in each sales range. The right tail is the peaks your stock has to absorb.

THE INVENTORY TAB

It shows the product's stock position and, at the bottom, "What buying this way would have done": it replays your way of buying over sales that already happened and compares it with ordering the same as last time.

TECHNICAL VIEW



The technical view adds models, statistics and analysis tabs.

· In the header, the Accuracy of the model the chart is drawn from, and next to the series type, its records and quality score.

· Run details: a disclosure with how the forecast was produced and what the ordering policy would have done.

· Above the chart: Chart (Line or Bar), Model (see another model’s curve) and Likely range (show or hide the band).

· Two rows of figures: Average sales, Sales range and Reliability; Variability, Historical points, Forecast steps, Chosen model’s average error and Best model.

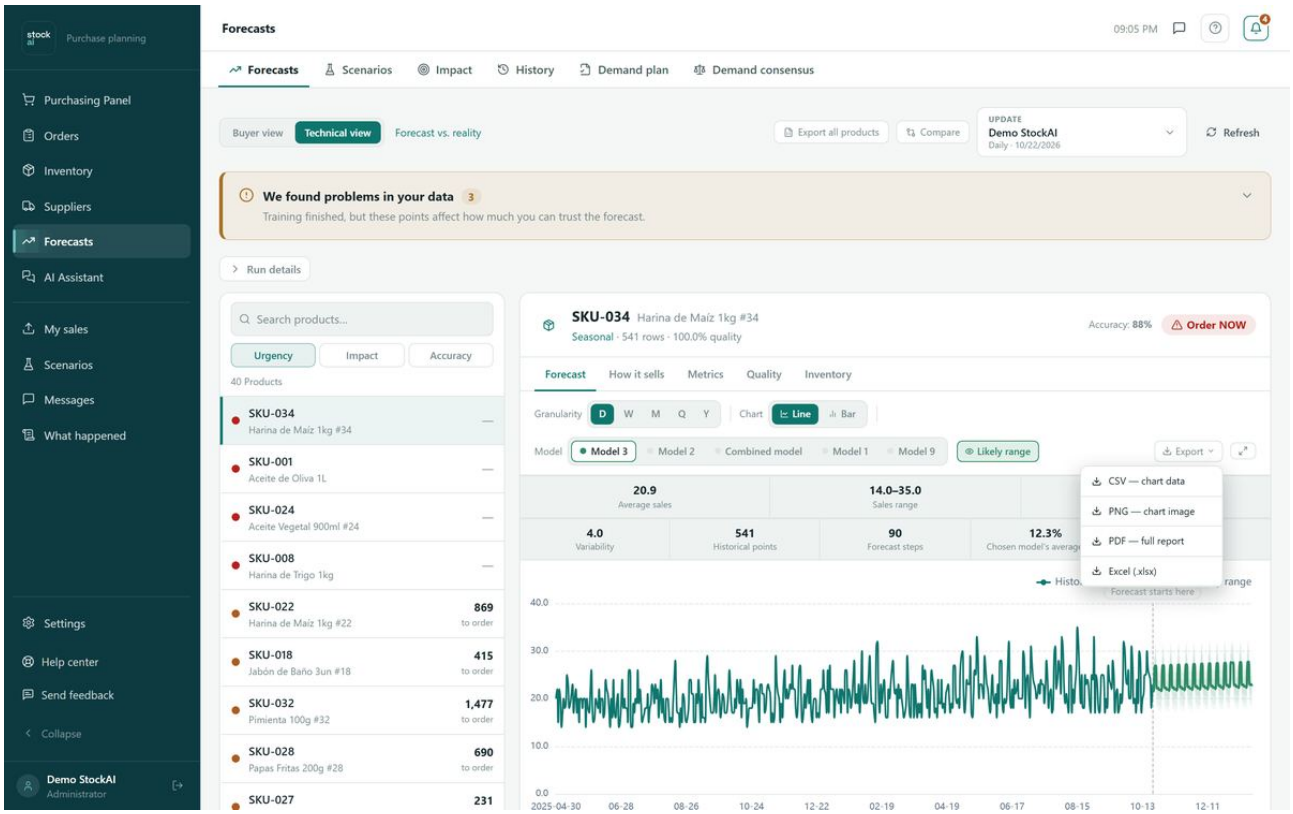
· At the bottom: original frequency, applied view, history and forecast points, model, and how many gaps and outliers were detected.

THE METRICS TAB (TECHNICAL VIEW)

It lists every model that ran on that product, sorted by Cost: what being wrong with each would cost, counting a shortage as three times as expensive as a surplus. The first one carries the "BEST" tag, which is why the winner may not be the one with the lowest WAPE. See How the models compete.

Models are shown as "Model 1", "Model 2"… and the numbering is the same across the app. The references — "Reference (last value)", "Reference (season)" and "Reference (average)" — are the bar to beat and never win.

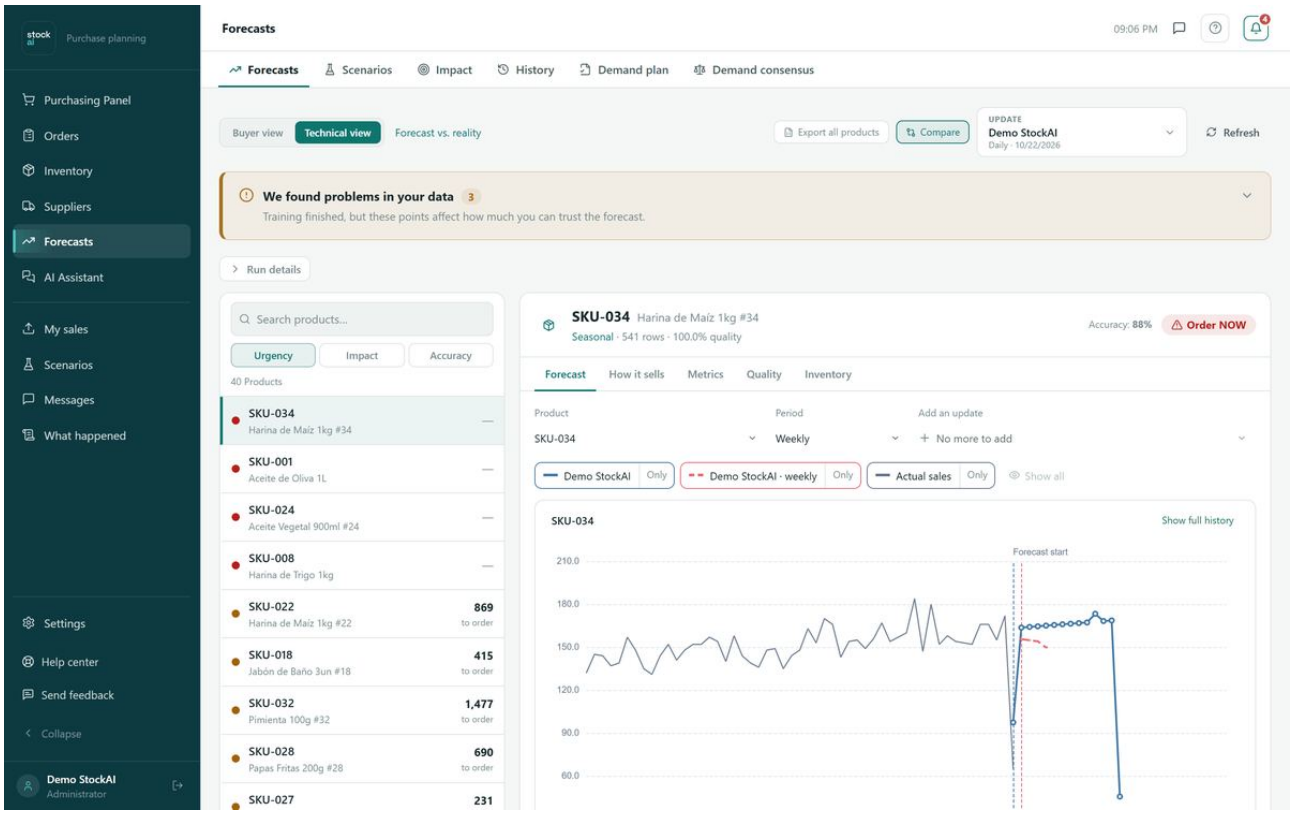
EXPORT



Export the open product in four formats.

CSV — chart data	The dates with sales and forecast.
PNG — chart image	The image as you see it.
PDF — full report	Chart, statistics and model performance.
Excel (.xlsx)	Summary, forecast and metrics sheets.

COMPARE RUNS



Up to six runs on the same time axis.

1. Switch to the Technical view and click “Compare”.
2. In “Add an update” pick another run (up to 6 at a time, including “the one you are viewing”).
3. Choose the Product or “All products (total)” and the Period.
4. Read the chart (with Actual sales) and the table with Update, Model, Horizon and Accuracy. Only keeps one series, Show all brings them back; Show full history / Focus on the forecast change the range.
5. Click “Compare” again to leave.

WHEN THERE ARE NO FORECASTS

With no runs, the list says “There are no products to analyse yet” with “Upload sales history”, which leads to My sales. If part of the results fails to load, a notice names what is missing and offers a retry.

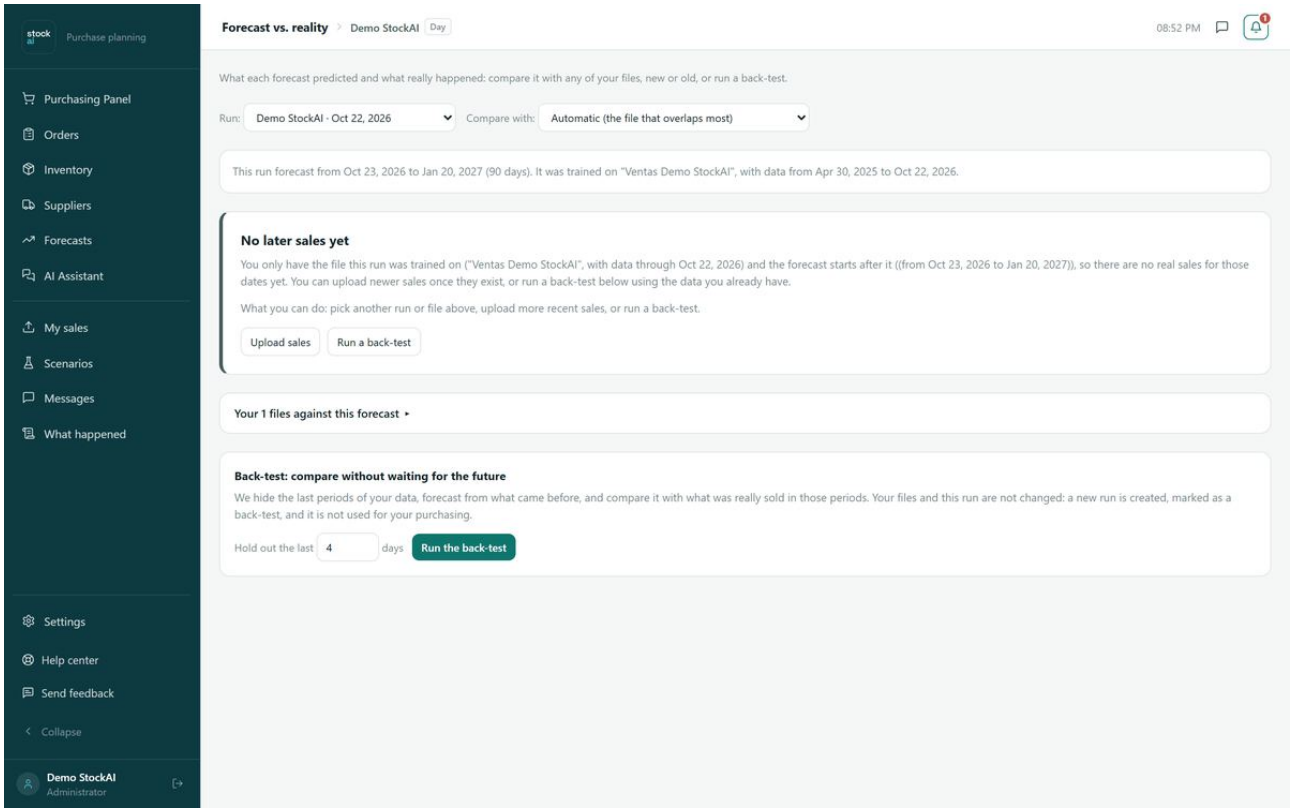
More context: How the models compete, Granularity and Stock signals.

Forecast vs. reality

Compare what a finished run predicted with what really sold afterwards: a verdict in plain words, the error per product, and a back-test to measure without waiting for the future.

The Forecast vs. reality screen answers one question: can I trust this forecast? It takes a finished run, looks among your sales files for the ones with real sales on the dates that run forecast, and measures the difference. The forecasting engine does all the maths; the screen shows it and says it in words.

> Who can use it
>
> Every role sees the comparison. Only an analyst or an admin can start a back-test; a read-only user sees “An analyst or admin can start a back-test.” instead.



Right after training, a run has no real sales to compare with yet: the screen explains it and offers a back-test.

CHOOSING WHAT TO COMPARE

Run:	All your finished runs, archived ones included (marked “(Archived)”) and back-tests (marked “(Back-test)”), newest first. On opening, the screen picks the run in the link (`?session=`), else the one the app plans from, else the most recent.
Compare with:	The file with the real sales. By default “Automatic (the file that overlaps most)”: StockAI picks the file whose dates best cover the forecast period. You can force any other, new or old; each option shows its name and date range.

Under the selectors a card sums up the run: “This run forecast from … to … (N days/weeks/months).” and “It was trained on "file", with data from … to ….” A back-test says so: “This is a back-test: it was trained without the last N periods and is compared with the full file.”

THE TWO AUTOMATIC CARDS

They appear only when they have something to say.

Automatic tracking	Compares the run’s error against real sales with its error at training time. It says “The forecast is performing N% worse than when it was trained.”, “The forecast is holding in line with its training accuracy.”, that there are still too few sales to judge, or that the run kept no training accuracy. It updates itself when you upload new sales. It is a notice: nothing retrains automatically.
Value of your forecast adjustments	Only if someone adjusted this run’s forecast by hand (in Consensus or in Forecasts). It compares each adjustment with the model’s untouched forecast on the same real sales: “Your adjustments improved/worsened the forecast error by N%”, on how many points it landed closer or farther, and the direction of the error (model → adjustment). With more than one person or reason it breaks it down per person and per reason. If sales for those periods have not arrived yet, it says how many adjustments are waiting to be measured.

THE VERDICT AND THE INDICATORS

When there are real sales to compare, a card says which file was used (“Compared with "…" (uploaded …), with sales up to ….”), how many forecast periods could be compared, and the verdict:

Verdict	When
“Your forecasts are on target”	Weighted error (WAPE) of 20% or less.
“Your forecasts are usable but loose” — keep a safety cushion	WAPE between 20% and 40%.
“Your forecasts are not hitting the mark” — review your data or retrain	WAPE above 40%.
“There are still too few periods to judge”	Fewer than 5 points compared: no judgement is made.

Below it, the direction of the error: “They tend to overshoot” (overstock risk), “They tend to fall short” (stock-out risk) or “No important bias”. It counts as bias when the forecast leans more than 10% to one side.

Weighted error (WAPE)	How far off the forecast was, measured against the units sold. Lower is better. It is the verdict’s number.
Average error (MAPE)	The average percentage error of each period; it weighs big and small products equally.
Bias	Positive: the forecast ran high. Negative: it ran low.
Periods compared	How many date-product pairs with both a forecast and a real sale were compared.

Products	How many products entered the comparison.

Hover an indicator’s name to read its explanation.

THE CHART AND THE PER-PRODUCT TABLE

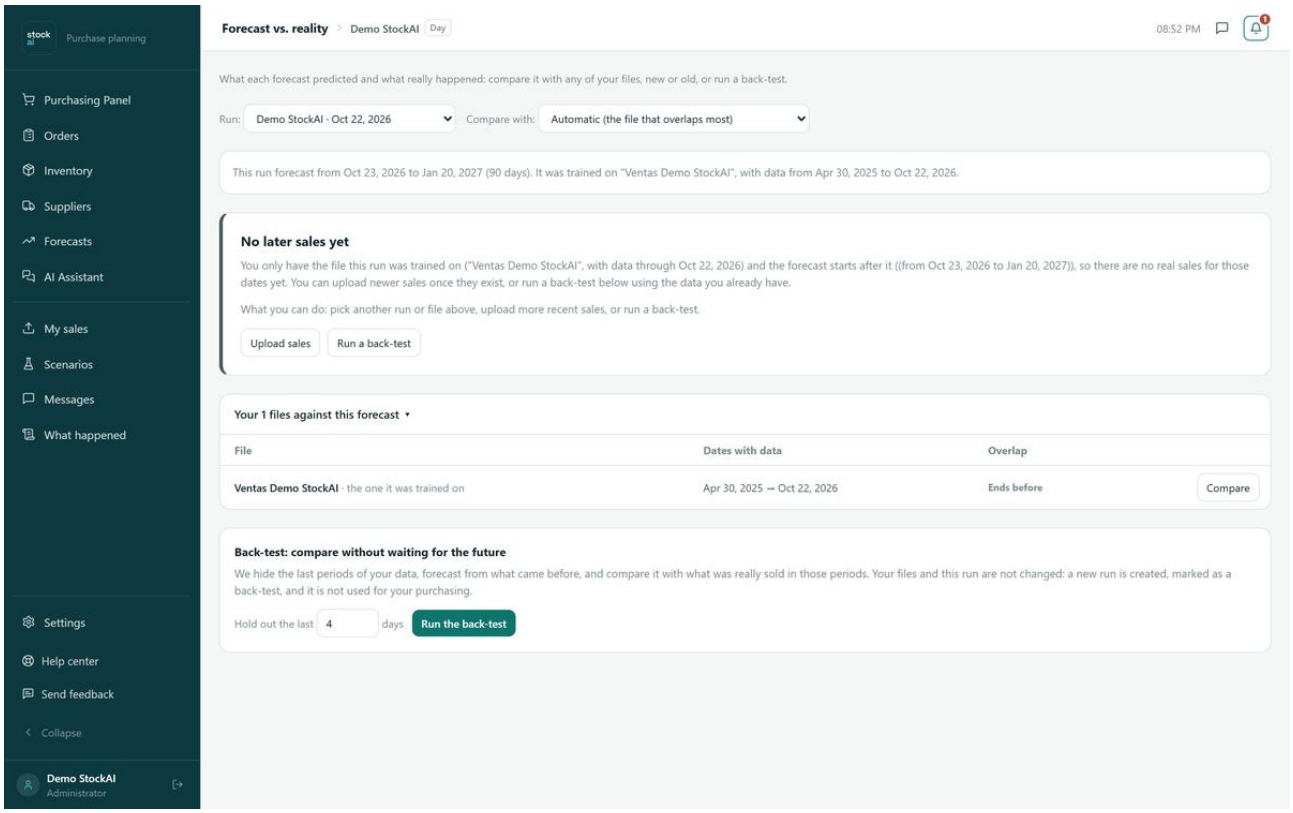
The “Forecast vs. actual” chart draws the forecast as a dashed line and what sold as a solid line. Hover a point to see its date and value. It starts with all products added up.

The “By product (the ones that missed most first)” table gives, per product: forecast, actual, weighted error, bias as a number and in words (“Over-forecast: ran above what sold”, “Under-forecast: ran below what sold”, “No bias”) and periods compared. If there are more products than fit, the footer says “Showing N of M products.”

1. Click a product’s row: it is highlighted and the chart switches to “product {code}”, with its error and bias above it.
2. Click “Show all” (top right of the chart) to go back to the total.

> A missing figure is not a zero
>
> If a product has no recorded sale on a date, that period is not compared and does not count as zero sales. The note “N periods were not compared because there is no recorded sale of that product on that date.” tells you how many were left out.

YOUR FILES AGAINST THIS FORECAST



Each file says whether its dates cover the forecast period.

Click “Your N files against this forecast” to expand all your sales files. For each: name (the training file carries “the one it was trained on”), Dates with data and Overlap:

Covers all	Its dates cover the whole forecast period.

Covers part	Only part of the forecast dates.
Ends before / Starts after	It has no sales on the forecast dates.
No dates	The file’s dates could not be read.
Different columns / No rows / Could not be read / Not checked yet	The file lacks the run’s columns, is empty, could not be opened, or has not been checked yet.

Each row’s “Compare” button does the same as picking that file in “Compare with:”.

WHEN THERE IS NOTHING TO COMPARE

The screen never goes blank: it explains why it cannot measure and what to do. The cases are:

No later sales yet	You only have the file the run was trained on and the forecast starts after it. That is normal right after training.
The new sales do not cover the forecast period	The chosen file (or every file) has no sales on those dates. The file list shows how far each one reaches.
The dates match, but the products do not	Check that product codes are written the same way in both files.
That file is no longer available	Choose another one from the list.
This run has no saved forecast	Choose another finished run.
We could not read the later sales	The file does not have the columns the run used, or it could not be opened.

Each notice carries two buttons: “Upload sales” (takes you to Files) and “Run a back-test” (scrolls down to the back-test card).

BACK-TEST: MEASURE WITHOUT WAITING FOR THE FUTURE



A back-test creates a new run; it does not touch your files or the chosen run.

If you do not want to wait for new sales, a back-test hides the last periods of your data, forecasts from what came before, and compares it with what really sold in those periods.

1. Pick the Run you want to test at the top.
2. In “Hold out the last” type how many periods to hide (in the run’s unit: days, weeks or months; 4 by default).
3. Click “Run the back-test”. The button shows “Starting…”.
4. You will see “Done: the calculation started with data through …”. It takes a few minutes; the “See the history” link takes you to History to follow it.
5. When it finishes, pick it under “Run” (it is listed as “Back-test: … (last N held out)”) to see the comparison.

What is refused

A back-test is refused if the file the run was trained on no longer exists, if the run is missing configuration, if you ask to hide more periods than that granularity’s forecast reaches, or if hiding them would leave too little history. It counts as one more run against your plan’s ceiling: at the ceiling it is refused (nothing is ever deleted to make room). It also stores a trimmed copy of the file as one more file, named “… (until date)”.

It does not affect your purchasing

Back-test runs are never used for planning or for the stock signals.

RELATED

- Forecasts: the forecast evaluated here, with a direct link to this screen.
- History: every run, back-tests included.
- How the models compete: the accuracy measured at training time.

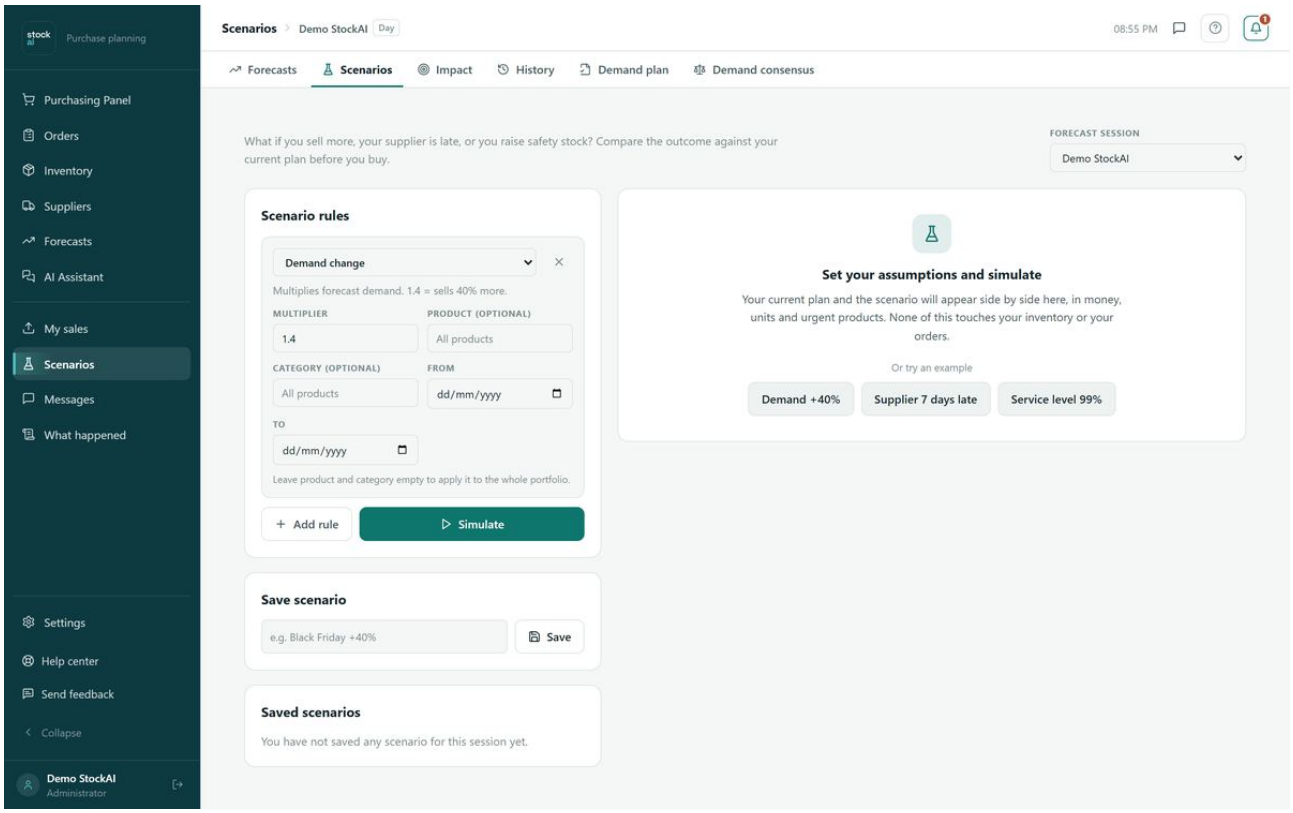
Scenario simulation

What if you sell more, a supplier is late, or you raise safety stock? Build rules, simulate, and compare against your current plan in money, units and urgent products, without touching your inventory.

Scenarios recalculates your purchasing under assumptions you set and puts it next to the current plan. Nothing you do here touches your inventory or your orders: it is a simulation.

> Who can use it
>
> Every role can build rules, simulate and load saved scenarios. Saving and deleting scenarios is for analysts and admins.

At the top right, “Forecast session” picks the finished run to simulate on. With none, the screen says “You need a finished forecast before you can simulate scenarios.” with a button to upload your sales. The screen has three columns: the rules, the result and the saved scenarios.



Before simulating: the rules on the left and three examples to start from.

SCENARIO RULES

Each rule is a card with its Rule type, a help line and its fields. When the screen opens there is already a Demand change rule with multiplier 1.4. The card’s X (Remove rule) deletes it; “Add rule” adds another. You can combine several.

Rule type	What it does	Fields
Demand change	Multiplies forecast demand. 1.4 = sells 40% more.	Multiplier (0.01 to 10), Product (optional) or Category (optional), From and To.

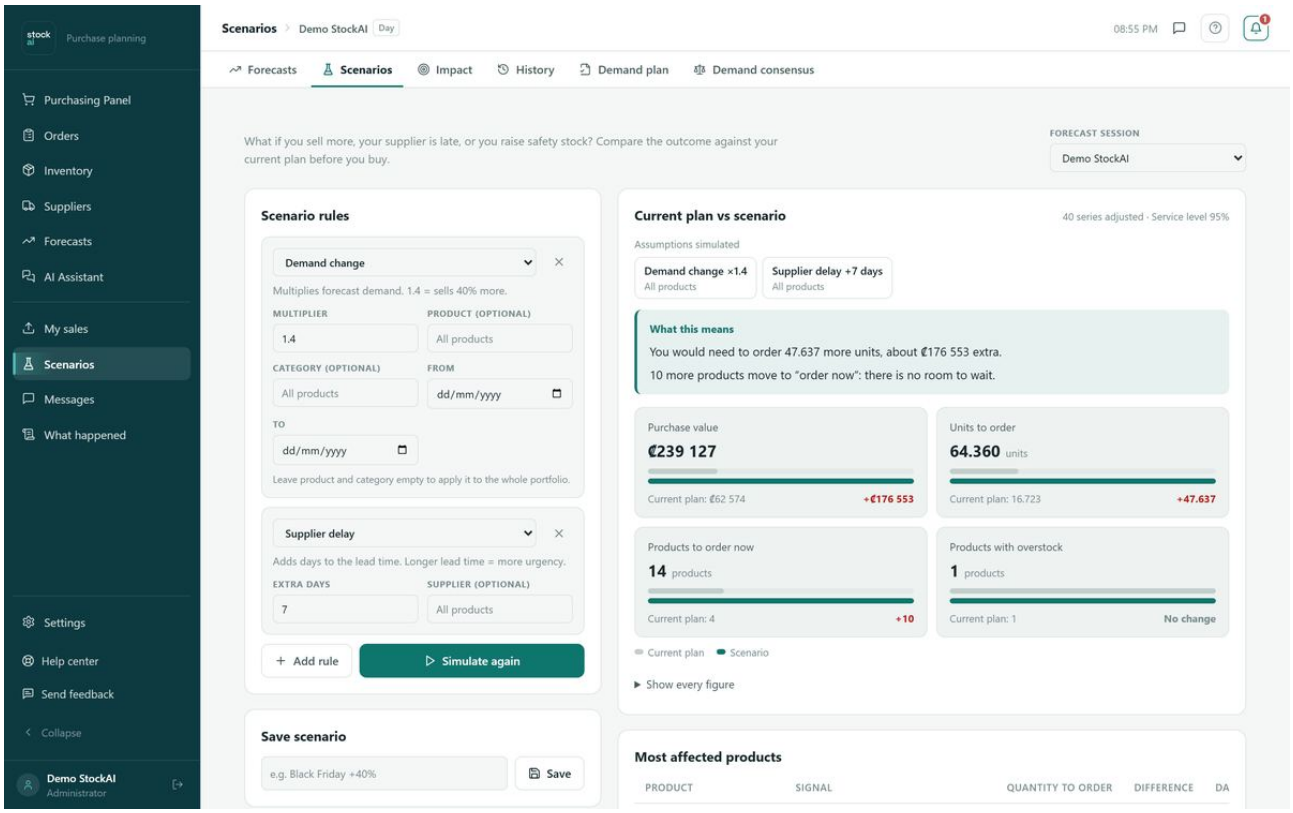
Rule type	What it does	Fields
Promotion	Same as a demand change, but limited to the promotion dates.	The same as Demand change; here the dates matter. Starts at 1.5.
Supplier delay	Adds days to the lead time. Longer lead time = more urgency.	Extra days (0 to 365, starts at 7) and Supplier (optional).
Safety stock	Recomputes at a different service level. Higher level = bigger cushion.	Safety against running out: 90%, 95%, 97% or 99% (starts at 99%).

Product and category exclude each other: typing one clears the other. Leave both empty to apply the rule to the whole portfolio (“All products”).

SIMULATE

1. Pick the Forecast session.
2. Adjust the rule that is already there, or change its type, and add the ones you need.
3. Click “Simulate”. While it calculates it says “Simulating…”.
4. Read the result. If you change something, click “Simulate again”.

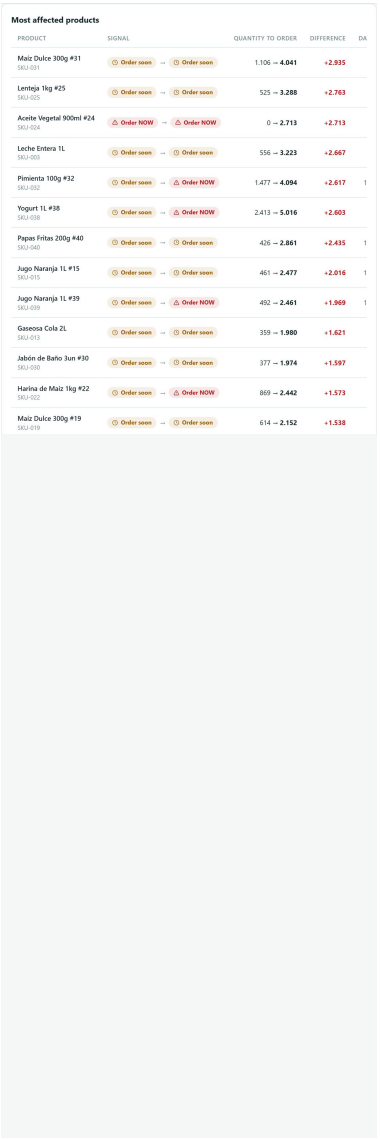
Shortcut: before the first simulation, the middle panel offers “Or try an example” with three buttons that load the rule and simulate in one go: Demand +40%, Supplier 7 days late and Service level 99%.



The result: assumptions, a reading in words and four indicators.

READING THE RESULT

Current plan vs scenario	The header says how many series were adjusted and at what service level it was calculated.
Assumptions simulated	One chip per rule: type, value (×1.4, +7 days, 99%) and what it applied to.
What this means	The result in sentences: how many units and how much money more or less you would order, how many products move to “order now” or stop being urgent, and how many more or fewer would be overstocked. If nothing changes: “your current plan holds up”. If the session has no inventory loaded it says so: without stock there are no purchases to compare.
Purchase value, Units to order, Products to order now, Products with overstock	Four indicators with the scenario figure, two bars on the same scale (grey the current plan, colour the scenario) and the difference, or “No change”.
Show every figure	Expands the full table with Current plan, Scenario and Difference for each metric.



Which products change most under the scenario.

“Most affected products” lists, per product: the Signal under the scenario, Quantity to order, Difference against the plan, Daily demand and Lead time (days). If the scenario changes no purchase: “This scenario changes no purchasing decision.”

SAVE, LOAD AND DELETE SCENARIOS

1. In “Save scenario” type a name (for example “Black Friday +40%”). Without a name the screen asks “Give the scenario a name to save it.”
2. Click “Save”. You will see “Scenario saved” and it appears under “Saved scenarios” with its number of rules.
3. Later, click “Load”: its rules and name are put back and it is simulated again on the current forecast.
4. The trash can (Delete) removes it from the list; for a few seconds you can click Undo on the notice.

> Saved scenarios belong to a session
>
> Each scenario is saved inside the chosen forecast session. If you switch session, the list shows that session’s scenarios, and the previous result is cleared so it never shows figures from another forecast.

> Simulating changes nothing
>
> It does not move your stock, create orders or touch the stored forecast. If you want a high season to really change what we suggest you order, record it as an event in Inventory ("Events and seasons").

RELATED

· Safety stock and Reorder point: what the safety stock and delay rules change.

· Stock signals: the result’s Signal column.

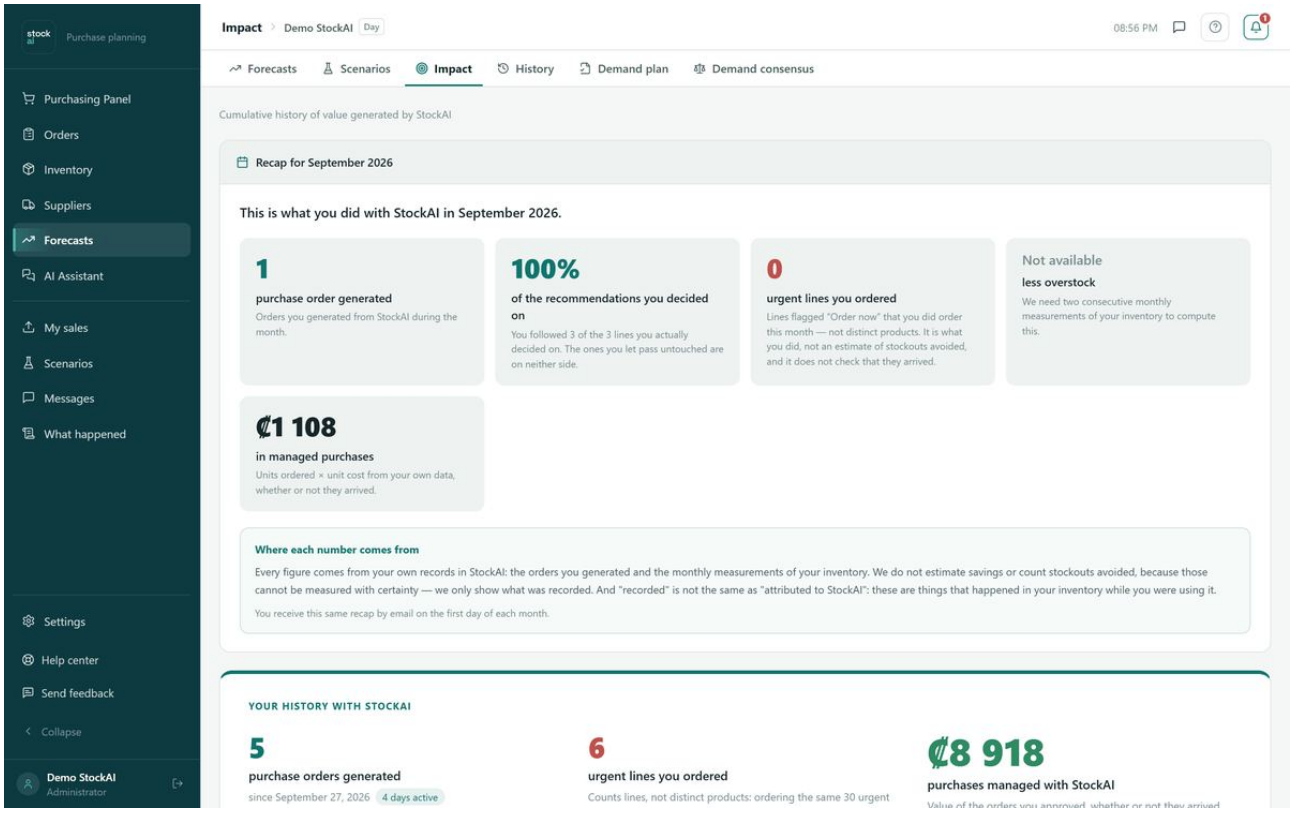
· Purchasing panel: where you actually buy.

Impact & ROI

The record of what you did with StockAI: orders generated, urgent lines ordered, purchase value managed, how often you followed the recommendations, and how your overstock changed month by month.

Impact & ROI adds up records the app already wrote: the orders you generated, the decisions you made on each recommendation, and the monthly measurements of your inventory. It is read-only and every role can see it.

> Records, not promises
>
> StockAI does not estimate savings or count stockouts avoided: that would require knowing what would have happened had you not bought, and that is not in your data. Each figure says what was recorded, and when there is no data it says so instead of showing a zero.



At the top, the recap of the last closed month; below, your cumulative history.

MONTHLY RECAP

The first card, “Recap for {month}”, always covers the last closed month and is the same recap you receive by email on the first day of each month. Its headline says how much your idle inventory dropped, or “This is what you did with StockAI in {month}.” when there is no drop to show.

purchase orders generated	Orders you generated from StockAI during the month.
of the recommendations you decided on	The adoption percentage: you followed N of the N lines you actually decided on. The ones you let pass untouched are on neither side. Shown only if there were decisions.

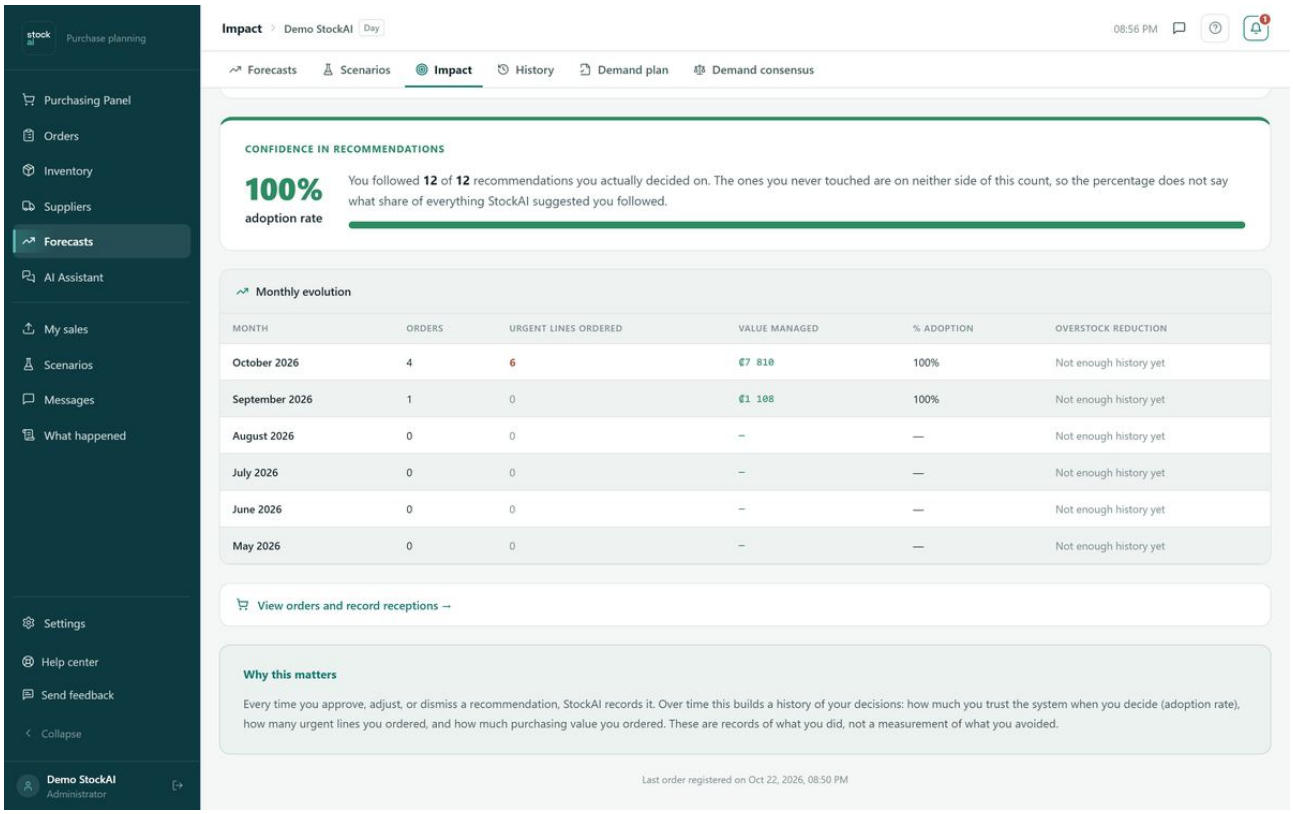
urgent lines you ordered	Lines flagged “Order now” that you did order this month. It counts lines, not distinct products, and does not check that they arrived.
less overstock	The difference between the value of your overstocked inventory at the start and the end of the month. Overstock also falls when you sell, record shrinkage, delete products or retrain, so it is not all down to your purchasing. It says “Not available” without two consecutive measurements, and explains separately when overstock grew (that is not missing data).
in managed purchases	Units ordered times unit cost, whether or not they arrived. Prefixed with “≥” when only some lines carried a cost: the real value is at least that. “Not available” if no product has a cost.

The “Where each number comes from” box explains this on the screen itself. If no order was recorded that month, the card says “Not enough history to compute this yet”.

YOUR HISTORY WITH STOCKAI

purchase orders generated	The total since the first one, with the date (“since …”) and the days active.
urgent lines you ordered	Every urgent line you ordered. It counts lines: ordering the same 30 urgent items every month for a year adds up to 360. It includes orders that have not arrived.
purchases managed with StockAI	The value of the orders you approved, whether or not they arrived. If your products have no unit cost, you see total units ordered instead, with a hint to add costs.

CONFIDENCE IN RECOMMENDATIONS



The adoption rate and the month-by-month evolution.

It appears once decisions are recorded (you approved or rejected lines in the Purchasing panel). It shows the adoption rate as a percentage and a bar: green from 70%, amber from 40%, red below. Underneath, “You followed N of M recommendations you actually decided on” and how many you dismissed — useful for fine-tuning lead times or service levels.

MONTHLY EVOLUTION

Month	Each month with activity.
Orders	Orders generated that month.
Urgent lines ordered	In red when there are any.
Value managed	Value of the month’s orders, or “—” without costs.
% Adoption	That month’s adoption rate, or “—” without decisions.
Overstock reduction	How much the overstock value dropped, “Your overstock went up this month” or “Not enough history yet”.

On a phone each month is a card; tapping it opens a sheet with the five figures.

AT THE BOTTOM OF THE SCREEN

· “View orders and record receptions →” takes you to Orders.

· “Why this matters” explains that these figures are records of what you did, not a measurement of what you avoided.

· With no orders yet, the “No orders registered yet” block with the “Go to Inventory” button.

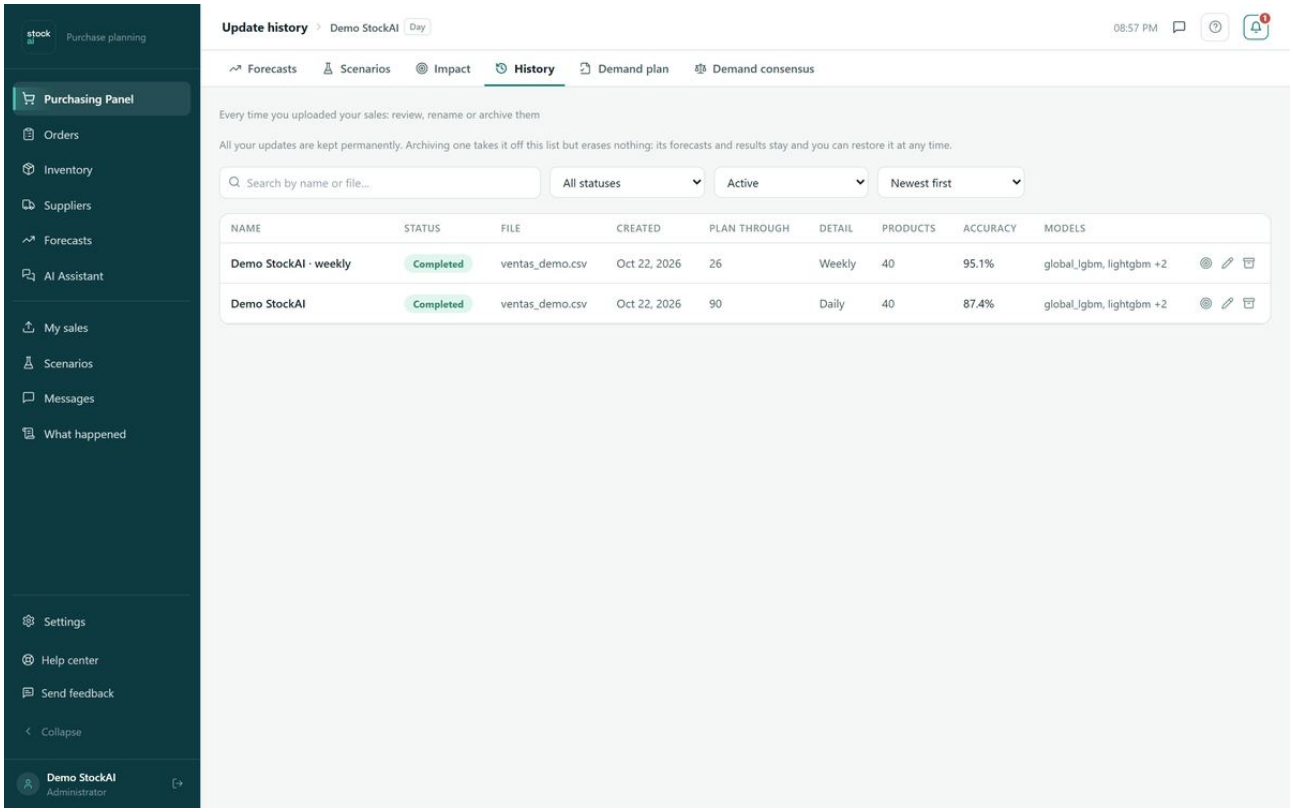
· The date of the last order registered.

For the screen to have figures, generate orders from the Purchasing panel and record your products’ unit cost in Inventory.

Update history

Every time you uploaded sales and a forecast was calculated, it is kept here permanently: search, filter, sort by accuracy, open, rename, archive or restore it.

History is the library of all your runs (each “update” is a sales upload with its forecast). Nothing expires: a run is kept for as long as the account exists. Archiving takes it off the working list without deleting anything, and it can be restored.



Search and filters at the top; one row per run.

WHO CAN DO WHAT

Every role sees the history, opens results and compares with reality. Rename, Archive and Restore are for analysts and admins: a read-only user does not see those buttons.

SEARCH, FILTER AND SORT

Search by name or file…	Searches the run’s name and the file’s name. It waits a moment after you type and goes back to page one.
Status	All statuses, Completed, In progress (queued or calculating), Failed or cancelled and Not finished setting up (runs left halfway through the wizard).
Show	Active (default), Archived or All (including archived).
Sort by	Newest first, Oldest first, Name (A–Z), Highest accuracy first and Lowest accuracy first.

The list shows 25 runs per page. With more, the footer shows “1–25 of N”, “Page 1 of N” and the previous and next arrows. If a filter leaves nothing, you see “No update matches” with a “Clear

filters” button.

THE COLUMNS

Name	The run’s name, with the tags Back-test (see Forecast vs. reality) and Archived. Archived rows are slightly dimmed.
Status	Completed, Failed, Cancelled, Queued, Calculating, or a wizard stage (Draft, Data loaded, Data inspected, Columns configured, Features configured, Ready to calculate). A Failed run shows the engine’s “Technical detail:” underneath, in English: it is for whoever helps you look into it.
File	The sales file it was calculated from.
Created	The run’s date.
Plan through	The forecast horizon.
Detail	The granularity: Daily, Weekly or Monthly.
Products	How many products it forecast.
Accuracy	100% minus the percentage error of each product’s best model on past tests, averaged over products (hover to read it).
Models	The models trained; with more than two, “+N” and the full list on hover.

ROW ACTIONS

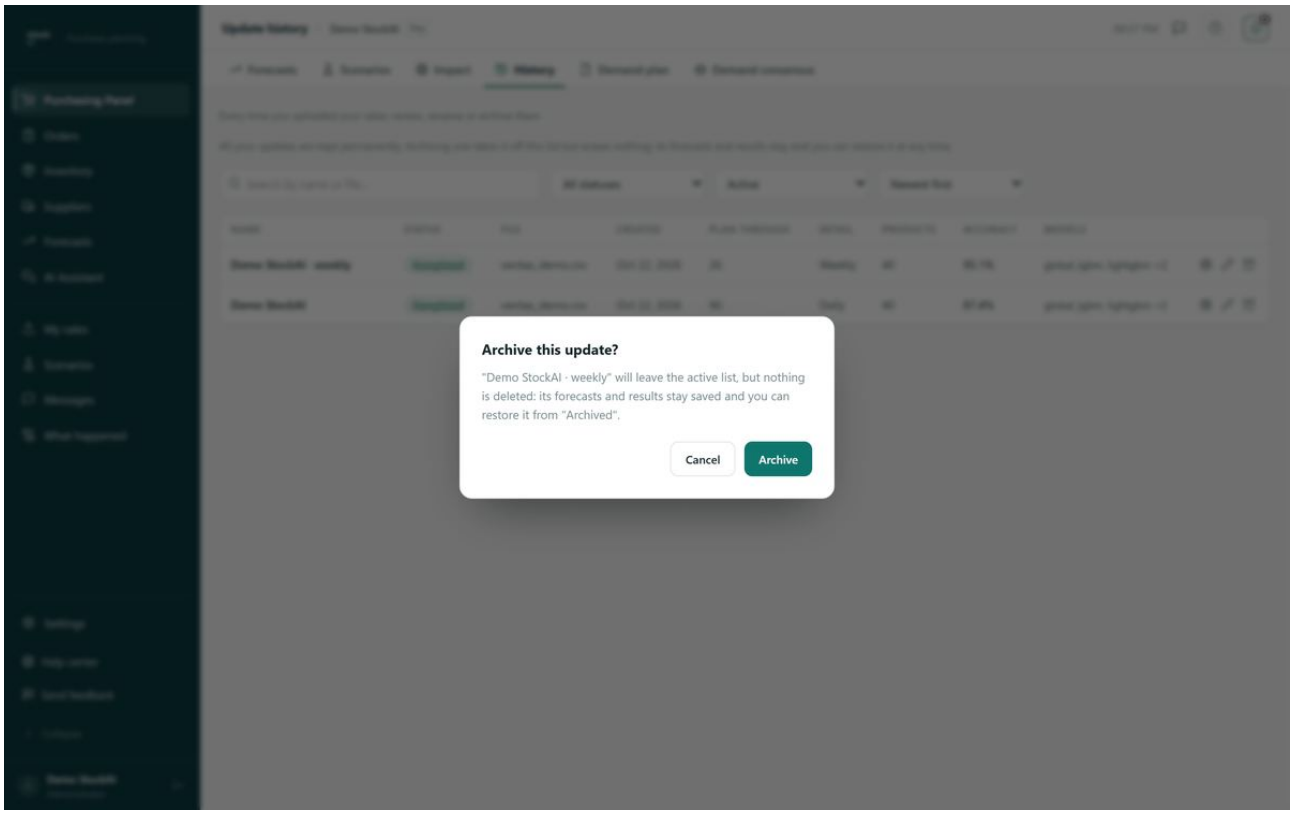


Renaming happens in the row itself.

Click the row	If the run is Completed, it opens its results in Forecasts.
Target · Compare with what happened	Opens Forecast vs. reality on that run. Shown on completed runs once you have at least two.
Pencil · Rename	Turns the name into an editable field.
Box · Archive	Takes the run off the active list. Disabled while it is queued or calculating (“An update in progress cannot be archived”).
Box with arrow · Restore	On archived runs: puts it back on the active list.

1. To rename, click the row’s pencil.
2. Type the new name and press Enter or the tick (“Save name”). Escape or the X (“Cancel editing”) keeps the old name.

ARCHIVE AND RESTORE



Archiving asks for confirmation and explains that nothing is deleted.

1. Click the row’s box icon.
2. Read the “Archive this update?” dialog: the run leaves the active list, but its forecasts and results stay saved.
3. Click “Archive” to confirm, or “Cancel”.
4. To bring it back, choose Show → Archived and click Restore on its row.

> Nothing is deleted
>
> No action on this screen deletes a run or its results; archiving is recorded in the Activity log. An archived run is not used for planning. Restoring counts it again as an active run against your plan’s ceiling: at the ceiling it is refused and the message says so.

WHEN THERE ARE NO RUNS YET

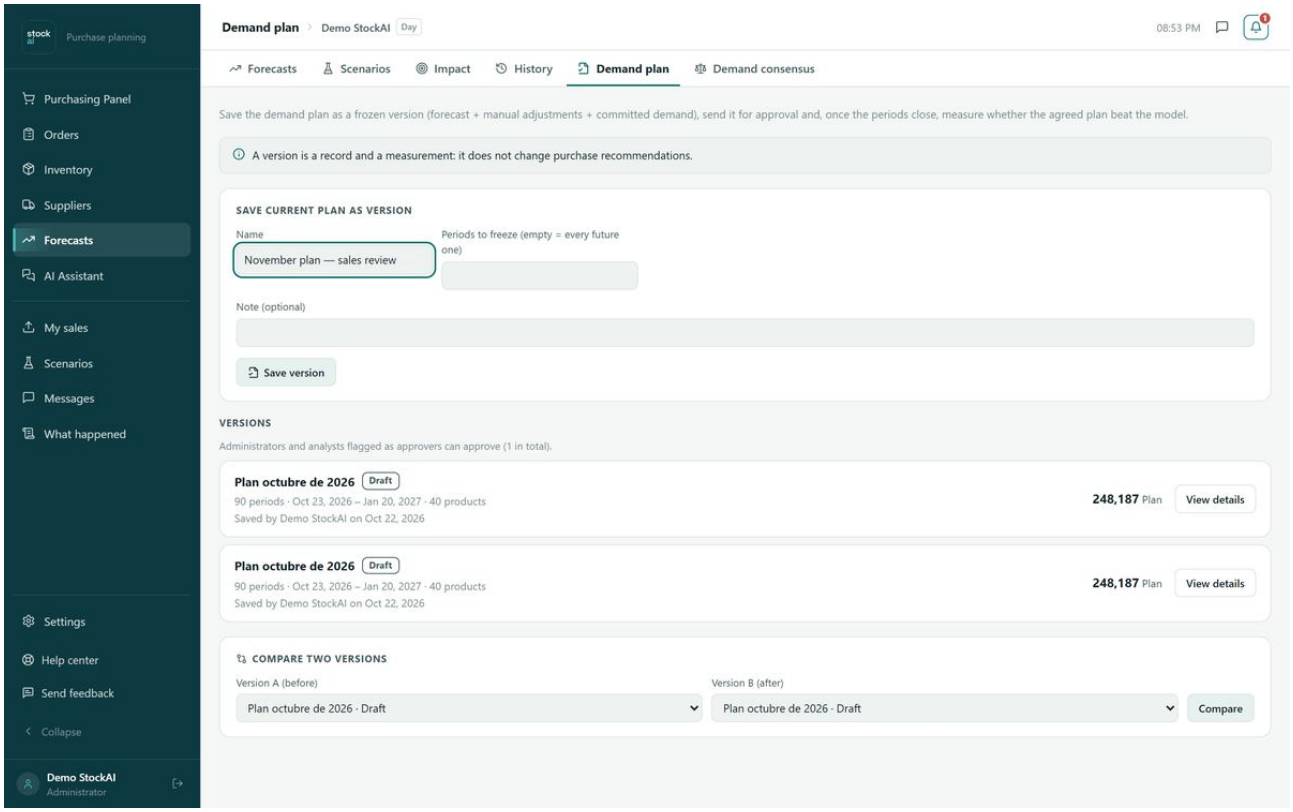
You see “You have not uploaded your sales yet” with a button to My sales. On a phone each run is a card; tapping it opens a sheet with every detail and the View results, Compare with what happened, Rename and Archive or Restore buttons.

Demand plan

Freeze the demand plan (forecast + adjustments + committed demand) as a version, send it for approval, compare versions, and measure whether the approved plan beat the model.

The Demand plan screen is a formal record of the plan, S&OP style: you save a snapshot of the current plan, someone with the authority approves or rejects it, and once the periods close StockAI measures whether the agreed plan was more accurate than the statistical forecast.

> It does not change your purchasing
>
> The screen says so at the top: “A version is a record and a measurement: it does not change purchase recommendations.” The stock signals and the Purchasing panel keep reading the live forecast, adjustments and commitments, not the approved version.



At the top, the form that freezes the plan; below, the saved versions with their status.

WHO CAN DO WHAT

Action	Who
View versions, their details and accuracy, compare	Every role
Save a version, comment and submit it	Analyst and admin
Approve or reject	Admins and analysts flagged as approvers (the same flag that approves purchase orders, see Approvals)

A read-only user sees “You can view the versions; saving and submitting them is for analysts and administrators.” instead of the form.

WHAT A VERSION FREEZES

For each product and future period, the version stores four numbers:

Forecast	The statistical forecast of the winning model of the run the app plans from.
Adjustments	The manual adjustments active on that forecast (made in Consensus or in Forecasts).
Committed	Committed demand: customer orders you already know are coming.
Plan	Forecast + adjustments + committed, never below zero. It is the version’s main figure.

A product with commitments only (no forecast) is included too, tagged “commitments only”.

SAVE THE CURRENT PLAN AS A VERSION

Name	Up to 120 characters. Left empty, the placeholder is used: “Plan {month year}”.
Periods to freeze (empty = every future one)	How many periods ahead to store, 1 to 520, in the run’s granularity. Empty stores every period the forecast has.
Note (optional)	Up to 1,000 characters; shown under the version’s title.

1. Type a name (or keep the suggested one), and optionally the number of periods and a note.
2. Click “Save version”.
3. You will see “Version "…" saved as a draft.”: the version is listed first, as Draft, and its details open.

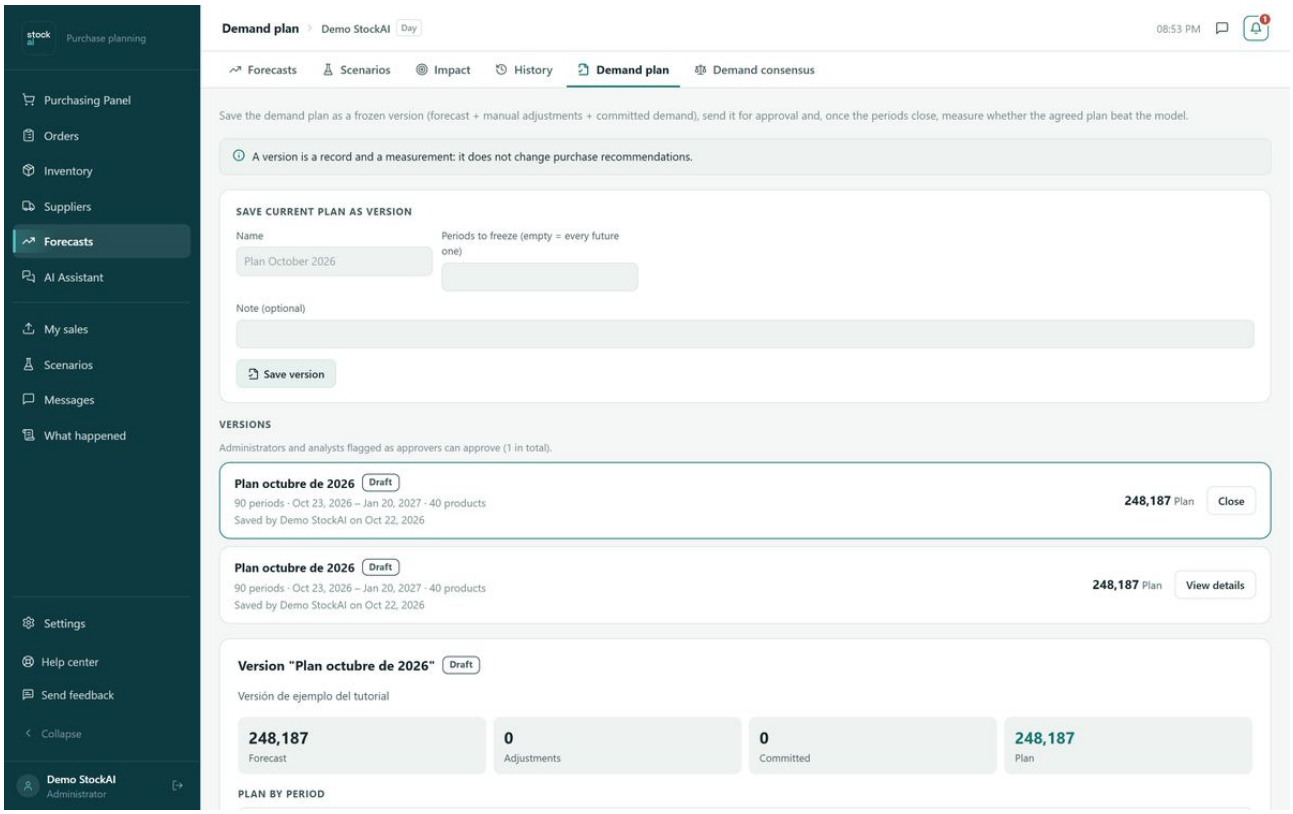
> When it is refused
>
> A finished, active run is needed: if there is none, or the run the app plans from is archived or a back-test, nothing is saved. It is also refused if the plan is too large to store as one version (choose fewer periods) or if the company already keeps the maximum of 1,000 versions.

THE LIST OF VERSIONS

Each version shows its name, its status, “N periods · first – last · N products”, “Saved by … on …” and the Plan total. If there are approvers, a line above the list says how many. “View details” opens the version under the list; “Close” closes it.

Draft	Just saved. It can be submitted for approval.
Awaiting approval	Waiting for an approver’s decision.
Approved	The company’s approved plan. There is only one at a time.
Rejected	Rejected with a reason. Final for that version.
Superseded	It was approved and another version was approved later.

A VERSION'S DETAILS



The details: totals, plan by period, products, history and the sign-off area.

· The four totals: Forecast, Adjustments, Committed and Plan.

· Plan by period: a table with the same four numbers per period.

· Products: the version's products, largest plan first, 20 at a time ("Showing 20 of N products."). The "Search SKU" box filters by code.

· Accuracy of the approved plan: only on approved or superseded versions (see below).

· History: who saved, submitted, approved, rejected or commented, with the date and the comment. An approval by the only person with authority is marked "Self-approved: they were the only person with approval authority."

SUBMIT, APPROVE OR REJECT

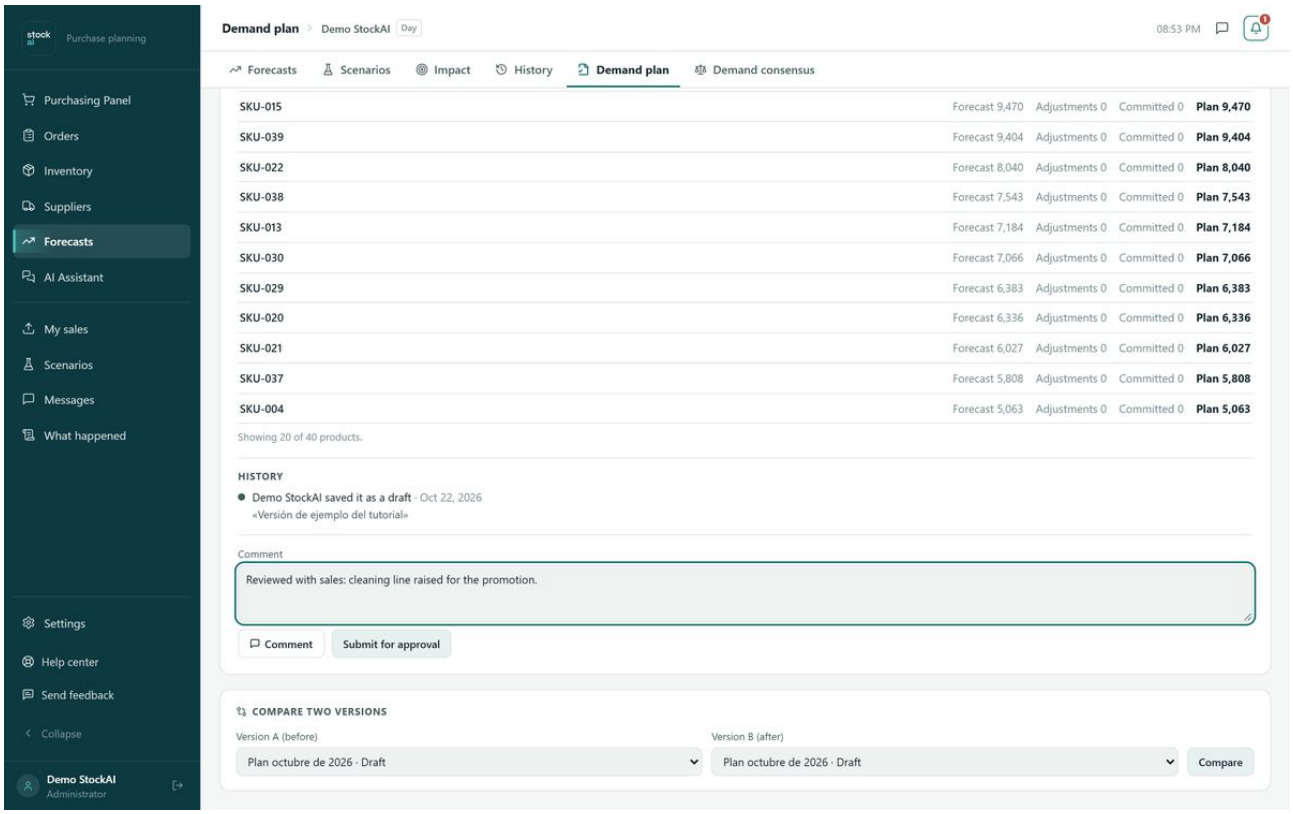
At the bottom of the details (analysts and admins only) there is the Comment box and the buttons that fit the version's status.

1. On a Draft version, click "Submit for approval" and confirm. The dialog reminds you: "The version's numbers are already frozen; to change them, save a new version."

2. An approver opens the version Awaiting approval, optionally writes a comment, and clicks "Approve" or "Reject".

3. Approving asks "Approve "…"?": it becomes the approved plan and the previously approved version becomes Superseded.

4. To reject, first write the reason in Comment (at least 3 characters; otherwise the screen asks "Write in the comment why you are rejecting the plan.") and confirm. Rejection is final for that version.



The buttons change with the version's status.

The "Comment" button adds the text to the history without changing the status; it works in any status.

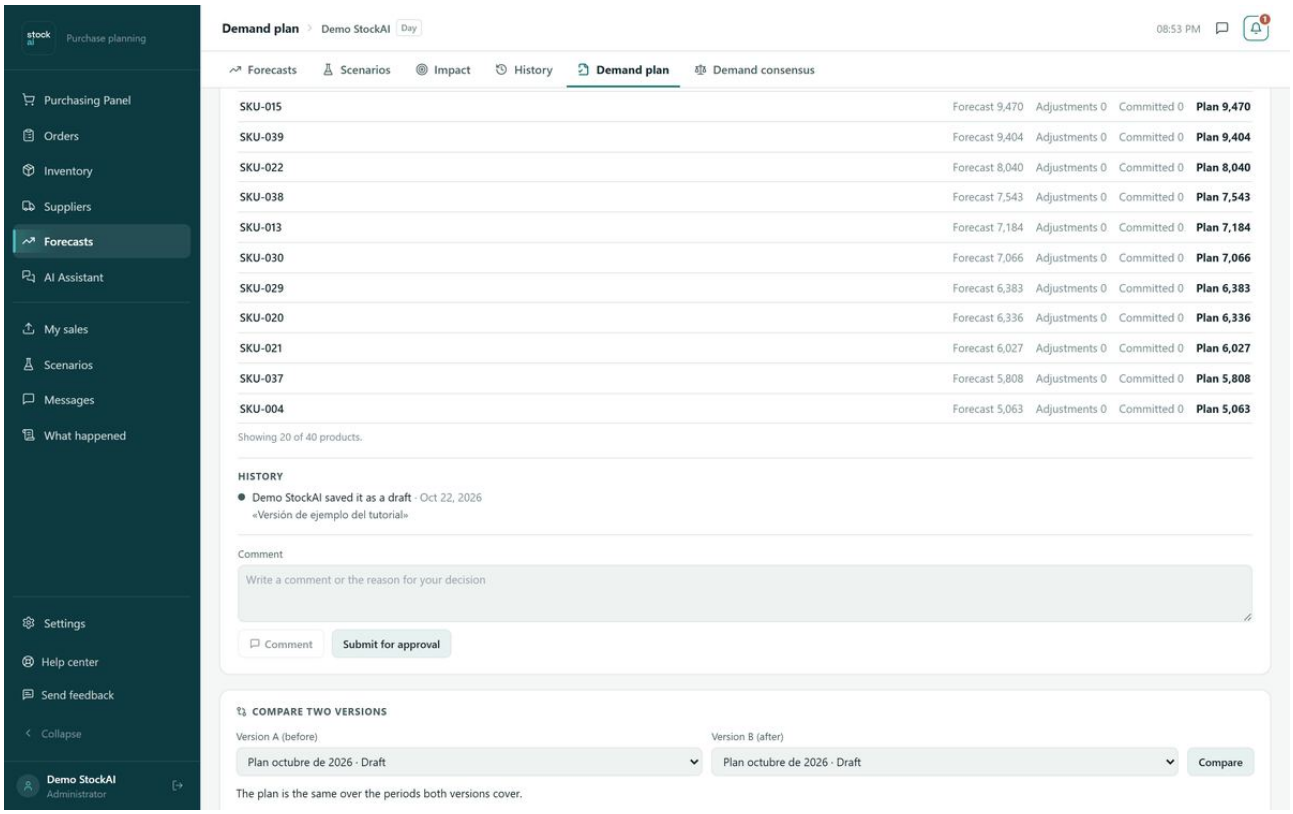
> Nobody approves their own
>
> Whoever submitted the version cannot approve it when another approver exists: the button is disabled and "You submitted this version: another person with the authority must approve it." is shown. If they are the only person with authority, they can approve it and the history marks it as self-approved. A non-approver sees "You do not have the authority to approve plans...".

ACCURACY OF THE APPROVED PLAN

On an approved or superseded version, StockAI compares the plan and the statistical forecast with what sold, over the same products and closed periods. It shows Plan error (WAPE), Model error (WAPE), Plan bias and Model bias, the verdict ("The agreed plan beat the model: N% less error.", "...did worse than the model.", "...were about equally accurate." or "too little data") and the Products with the largest plan error.

While it cannot measure, it says why: no period has closed yet (and when the first one closes), periods closed but no sales are loaded for them, or no sales file covers them yet. Points with no recorded sale do not count as zero, and products planned from commitments only are not compared because they have no statistical forecast.

COMPARE TWO VERSIONS



See which products changed between two versions.

1. In “Version A (before)” and “Version B (after)” pick two different versions (by default, the second newest and the newest).
2. Click “Compare”.
3. Read the summary: “N products changed over the N periods both cover. Total: A → B.”, and below each product with Plan A, Plan B and the change in units and %. Products present in only one version are tagged “only in A” or “only in B”.

With fewer than two versions the card says “Save at least two versions to compare them.” If they share no period: “These versions do not cover any period in common.”

RELATED

· Consensus: where the adjustments that enter the plan are proposed and approved.

· Forecast vs. reality: the statistical forecast’s accuracy per run.

· Forecasts: where the Forecast column comes from.

Forecast consensus

Sales, finance and operations submit adjustments to the statistical forecast with a reason; your company’s rule turns them into one consensus, an approver publishes it and, once real sales arrive, StockAI measures who was right.

The Consensus screen is the S&OP process for the forecast: each function (Sales, Finance, Operations) says how much it would raise or lower a product’s demand in a period, and why. Every version is kept with who, when and why. Your company’s rule turns those adjustments into a consensus; an approver publishes it, and only then does planning read it.

> Nothing changes until it is published
>
> The screen says so at the top: none of this changes a purchase recommendation until an approver publishes a consensus. With nothing published, StockAI calculates exactly as before. The forecasting engine is never retrained: the consensus is layered on top.

At the top you pick the Forecast (the finished run you work on; by default the one the app plans from). If there is none, the screen says “There is no completed forecast yet to build a consensus on.” Below are the four tabs: Adjustments, Consensus, Accuracy and Rule.

WHO CAN DO WHAT

Action	Who
See every tab	Every role
Submit adjustments	Analysts assigned to that function on the Rule tab; an admin can speak for any
Propose a consensus, refresh the evidence	Analyst and admin
Approve and publish, reject, withdraw	Admins and designated approvers
Change the rule and who speaks for each function	Admin only

ADJUSTMENTS TAB

Product (code)	The product code as it appears in your sales.
You speak for	The function you submit for. Only the functions you are assigned to are listed.
From / To	The period the adjustment covers. Today by default.
Adjustment (%)	+10 raises demand by 10%, -5 lowers it by 5%; up to 2 decimals (comma or point).
Reason	Promotion, Price change, New customer, Lost customer, Seasonality, Supply issue, Market news, Data error, Budget target, Capacity constraint or Other.
Note (required when the reason is "Other")	Up to 300 characters.

1. Type the product code.

2. Pick the function you speak for, the period, the percentage and the reason.
3. Click “Submit adjustment” (enabled once there is a code).
4. You will see “{function} adjustment saved for {code}.” and it appears under Current adjustments.

> To correct, submit again
>
> An adjustment from the same function for the exact same period replaces the previous one; the previous one is not deleted, it stays in the history. Tick “Show every version” to see them all: superseded ones are dimmed and tagged “superseded”.

The Current adjustments table shows Product, Function, Period, Adjustment, Reason (with the note), Who and when, and Revision. If you are not assigned to any function, instead of the form you see “You do not speak for any function. Ask an administrator to assign you on the Rule tab.”

CONSENSUS TAB

“Consensus under the current rule” is a preview: “N periods across N products, from N current adjustments”, the rule in one sentence, and a table with Product, Period, Consensus (the agreed percentage), How it was decided (“Sales decides” or “Weighted average”) and What each function said (with “limited by the cap” when a figure was trimmed). “Show more” loads more periods.

1. Review the preview.
2. Type a Version name (empty uses “Consensus {month year}”) and optionally a Note.
3. Click “Propose this consensus”. You will see “Version "…" proposed. It stays frozen until an approver decides.”
4. An approver opens the version with “Open”, optionally writes a Decision comment, and clicks “Approve and publish” or “Reject” (rejecting needs a comment of at least 3 characters).

A version’s details show the rule it was frozen with (priority and caps, or weights and caps), its lines, and the history (who proposed, approved, rejected or withdrew it). When a consensus is published, a green line at the top reads “Published consensus: "…". Planning reads it instead of the manual adjustments of the same dates.”

Proposed	Frozen, waiting for a decision.
Published	Approved: planning reads it. Only one at a time; publishing another replaces it, and the old one stays on record.
Rejected	Rejected with the comment. No purchase changes.
Withdrawn	It was published and was withdrawn with “Withdraw” (asks for a reason): planning goes back to the statistical forecast and the manual adjustments.
Superseded	A newer version was published.

> When it cannot be approved
>
> If a function revised its adjustment after the proposal, the version no longer reflects what is current: “It cannot be approved: propose the consensus again.” If all its periods have passed, the screen warns you. Whoever proposes does not approve their own when another approver exists; if they are the only one, the note “Approved by the person who proposed it: they were the company’s only approver.” is kept.

ACCURACY TAB

“Value added by each adjustment” compares, once real sales arrive, the statistical forecast, the adjusted one and what sold. A positive Improvement means the adjustment came closer to reality than the model alone.

1. Upload recent sales in Files.
2. Click “Refresh with real sales” (analyst or admin). You will see “Evidence refreshed: N product-periods with real sales.” or why it could not be measured.
3. Read the tables: Published consensuses, By function, By person, By reason and By adjustment. Each has Points, Statistical error, Adjusted error, Improvement and Verdict (Improved, Worsened, No difference, Too little data, No data).

With no adjustments, the tab says “There are no adjustments or consensuses to measure yet.”; with adjustments but no compared sales, “No real sales have been compared yet…”.

RULE TAB

Priority: the first function that submitted an adjustment decides	You order the three functions in Position 1, 2 and 3. For each period, the first one in the list that submitted something wins.
Weighted average with caps	A Weight of 0 to 1000 per function. Only the functions that submitted an adjustment count; a weight of 0 is no vote.
Downward cap (%, from 0 to -100) / Upward cap (%, from 0 to 1000)	Every submitted figure is first limited to these caps.
Who speaks for each function	Checkboxes per person and function. An analyst can only submit for the functions they are assigned to.

1. Pick the rule and fill in the order or the weights.
2. Set the caps.
3. Tick who speaks for Sales, Finance and Operations.
4. Click “Save the rule”. You will see “Rule saved.”

> Until there is a rule
>
> If the rule was never saved, the tab warns “The rule has not been chosen yet: nobody can propose a consensus until an administrator chooses it.” Changing the rule does not change versions already proposed or published.

A non-admin sees the rule read-only and the list of who speaks for each function.

RELATED

· Demand plan: freeze the plan with its adjustments and approve it as a version.

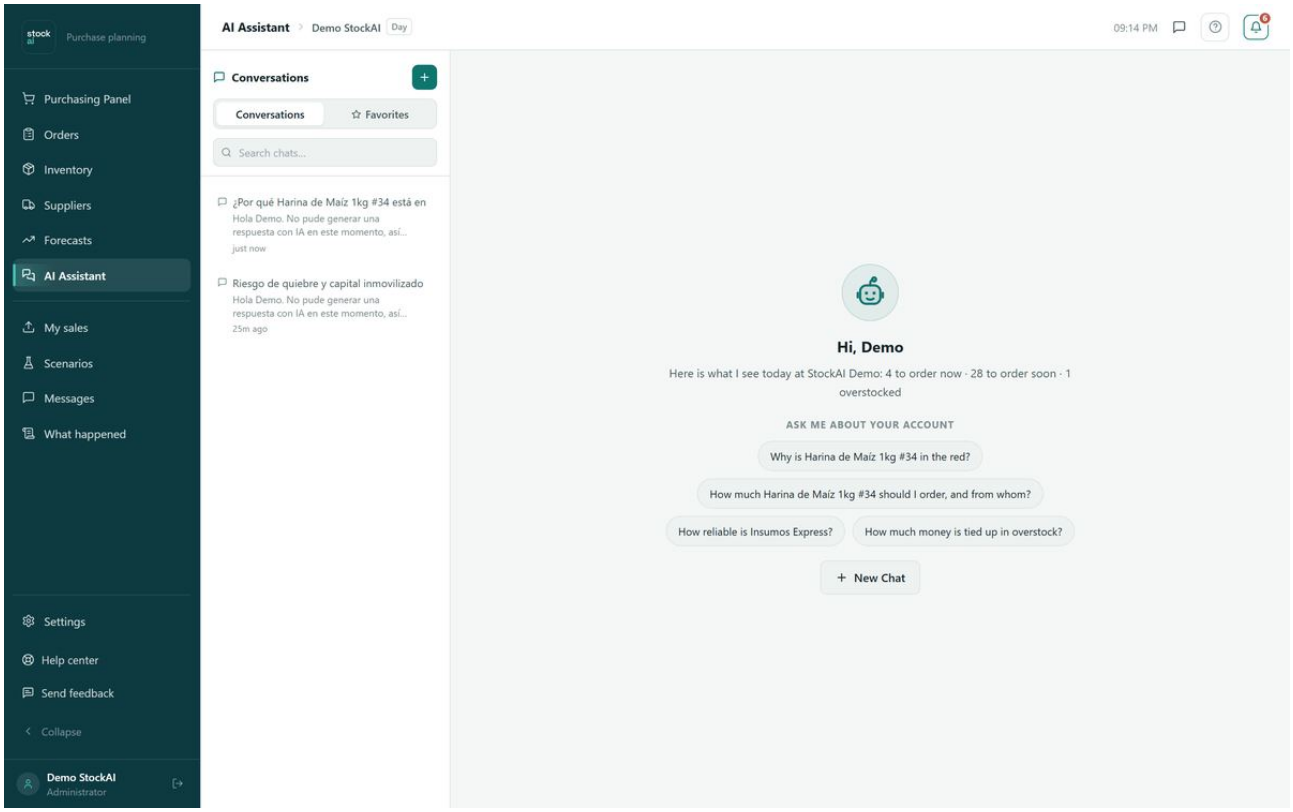
· Forecast vs. reality: the “Value of your forecast adjustments” card.

· Approvals: where approvers are designated.

AI assistant

Ask in plain language about your products, orders and suppliers: it answers with your account’s data. Keep conversations, star answers as favorites, and dictate with the microphone.

The Assistant is an analyst that knows your account: what is in “Order now”, which orders are late, which supplier is slowest. You type a question and it answers with your figures, not generalities. Every role can use it; it answers only with what that user is allowed to see.

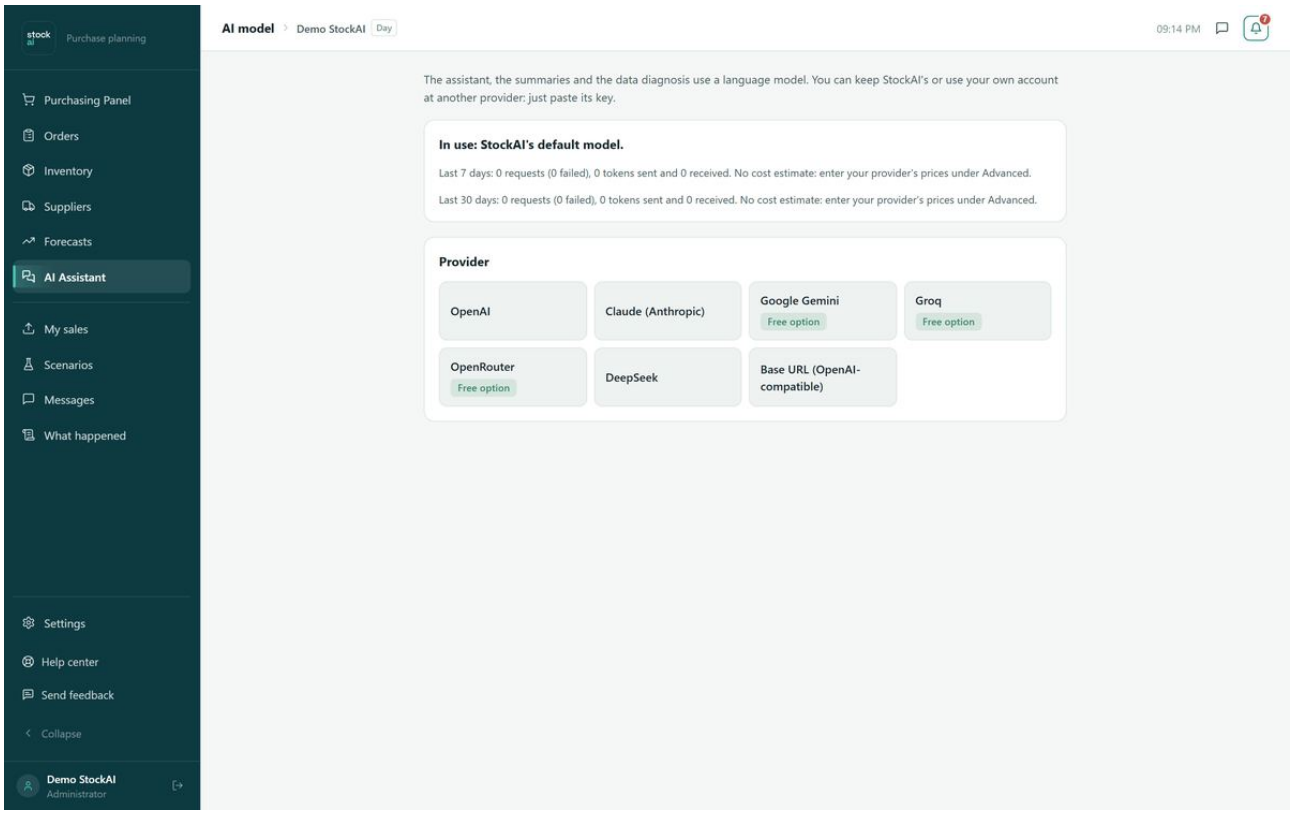


Your conversations on the left; on the right, the greeting with today’s summary and questions about your account.

WHEN THE ASSISTANT IS OFF

The assistant needs a language model. When none is available, the screen says so before you type, in a notice above the conversation, and the text box reads “The assistant is not available on this installation”. There are two cases:

The installation has no model	“This installation has no language model configured, so the assistant cannot answer. The rest of StockAI is unaffected…”. An admin also sees “You can also use your own OpenAI, Claude, Gemini or other account, even a free one.” with the “Choose AI model” link.
Your company’s own provider is failing	“Your AI provider (…) is failing:” or “…is paused after several failures:”, with the exact problem and how to fix it. Meanwhile the assistant answers from your data, without AI (a rule-based summary). An admin sees the “Check the AI model” link; everyone else, “Ask an administrator to check it.”



In AI model the admin chooses the company’s provider.

1. An admin opens AI model (from the notice’s link or from Settings).
2. Pick a Provider: OpenAI, Claude (Anthropic), Google Gemini, Groq, OpenRouter, DeepSeek or an OpenAI-compatible server. Those with a free tier say so; “Get a key” opens the provider’s page.
3. Paste the API key and choose the Model.
4. Click “Test connection”: you will see “Connection works: {model} answered in N ms.” or “The test failed.”
5. Click “Save”. The assistant uses that provider from the next question on.

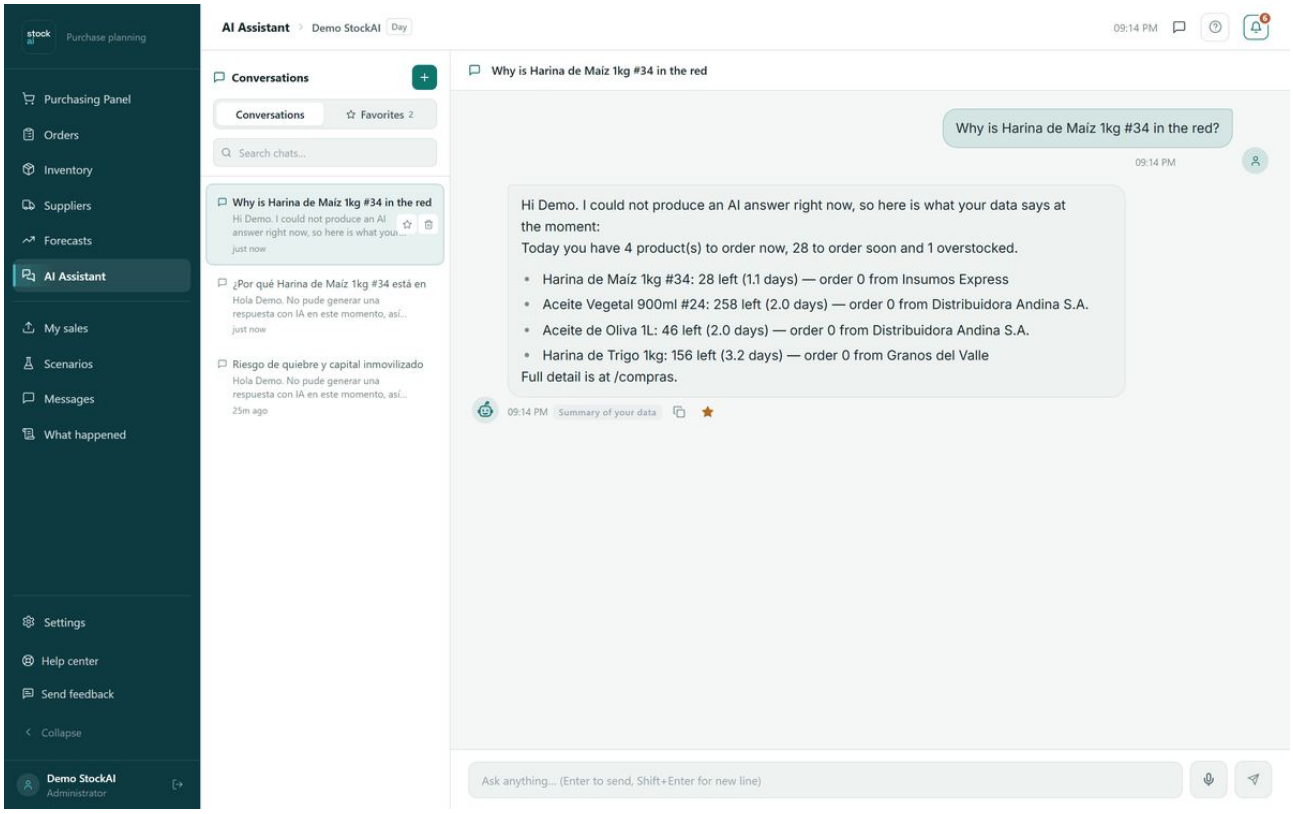
> Your key and your data
>
> The key is stored encrypted and never shown again. With your own provider, your questions go to that provider. If it fails, StockAI does not silently answer from another one: it tells you what failed. “Back to StockAI’s default” deletes the saved key. Only an admin can change the provider. More in AI model and Assistant privacy.

START A CONVERSATION

With no conversation open, the assistant greets you by name and sums up your day: how many products to order now and soon, how many late orders, how many overstocked and how many with no stock on record (or “Nothing urgent for now.”). Below, “Ask me about your account” offers ready-made questions about your data.

1. Click a suggested question: it is sent right away and a conversation is created. Or click “New Chat” (or the + next to “Conversations”).
2. Type in the box at the bottom. Enter sends; Shift+Enter adds a line break. You can also click the send button.

3. While it thinks you see typing dots. The answer appears with the time and a source label.
4. The conversation takes a title from your first question.



Each answer says where it came from.

Your data	A model answer with figures from your account, verified.
Check the figures	A model answer with a figure that could not be verified: check it before you decide.
Summary of your data	A rule-based answer, without AI (when there is no model or the provider failed).
General / General answer	A general question about forecasting or the platform.
Off topic / No access	The question is not about your business, or asks for data your role cannot see.
Error	No answer was obtained. The latest failed answer carries “Retry”, which sends the same question again.

> If it takes too long
>
> If the model does not answer in time you see “The assistant took too long to answer and the request was cut off. Your question is still here — try it again, or ask a shorter one.” Your question is not lost.

WHAT IT KNOWS ABOUT YOUR ACCOUNT

With every message the assistant builds a live brief of your account, with the parts closest to your question first:

· Who you are (your name, your role and your company) and how recent your forecast is.

· Today's red and amber products, with the suggested quantity, cover, supplier and lead time.

· Overstock and the money tied up in it.

· Your open purchase orders and the overdue ones.

· Your suppliers' real lead times and reliability.

· The demand trend, upcoming peaks, and what you did in StockAI lately.

When it needs something more specific — a product, its forecast, a supplier, a purchase order, your product list or your activity — it looks it up with read-only tools, just like the screens.

The red and amber products in the brief come from the same stock signal you see in Purchasing panel and Inventory: the active update, at your account's planning grain. To understand that signal, read The stock signal.

CHECKED FIGURES

Every number in an answer has to appear in your data, in what a tool returned, or in your own message. StockAI checks this after the model answers. If a figure does not match, it asks for a correction; if one is still unsupported after that, it is not hidden: the answer ends with a warning like "I could not verify these figures against your data" and lists them.

IT READS, NEVER CHANGES ANYTHING

The assistant cannot create, send, approve or receive purchase orders, nor edit stock, costs or suppliers. That is deliberate: a chat cannot show you a confirmation or give you an undo button. When you ask for an action, it says what it would do and points you to the screen where you do it:

To…	Screen
Decide what to order today and build the purchase order	Purchasing panel
Send an order, record its arrival, track what is coming	Orders
Stock, costs, lead times and minimum orders	Inventory
Suppliers and their scorecard	Suppliers
A product's forecast chart	Forecasts
Upload sales and recalculate	My sales
The impact of following the recommendations	Impact

COPY AND SAVE ANSWERS

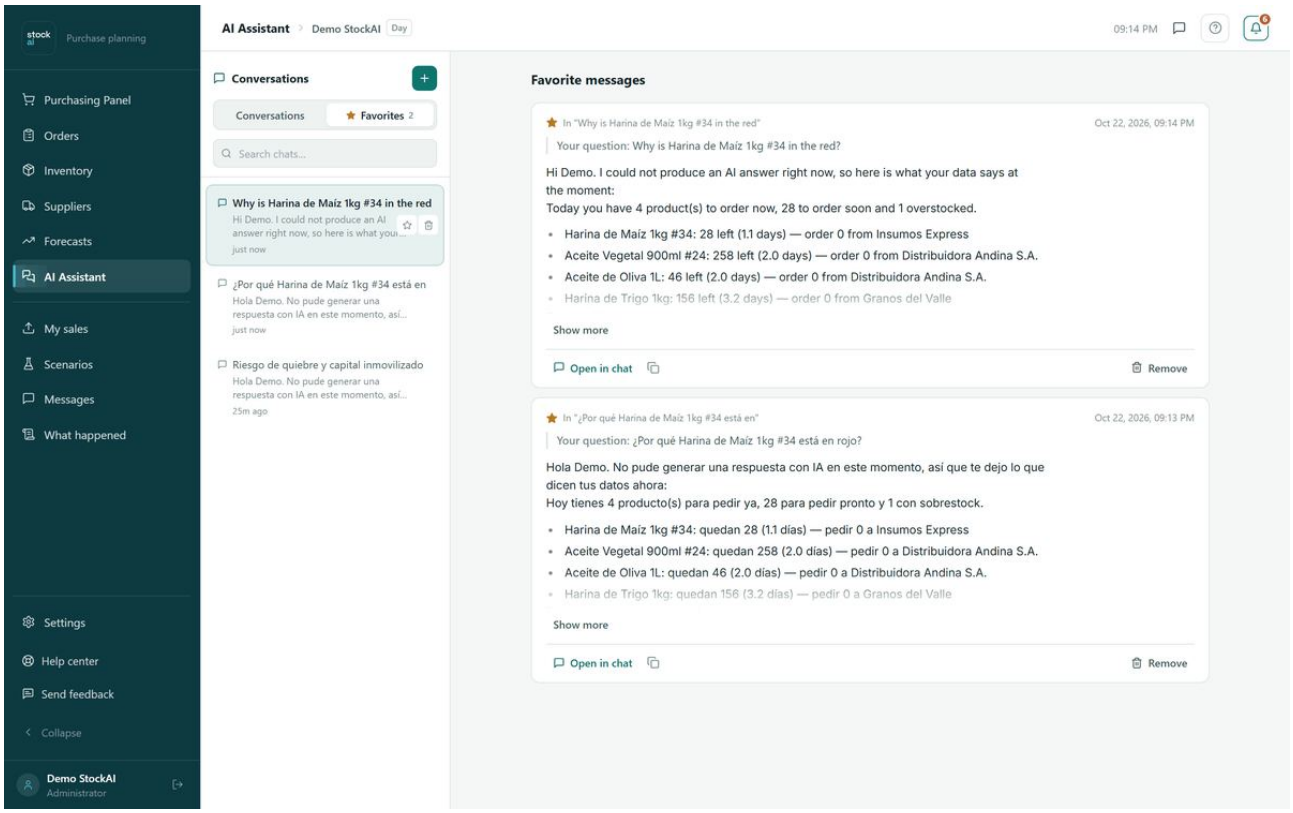
Hovering a message shows two buttons: Copy message (copies it as plain text; it says “Copied”) and the star, Save to favorites (click again to Remove from favorites).

THE LIST OF CONVERSATIONS

Search chats…	Filters the list by title.
Conversations / Favorites	The column’s two tabs: your conversations and your favorite messages.
Favorites and Recent	Inside Conversations, the starred ones go on top and the rest below, newest first, with a preview of the last message and how long ago it was.

Conversation star	On hover: Add to favorites / Remove from favorites.
Trash can	Delete chat. It asks for a second click (Confirm delete); the conversation disappears and a notice offers Undo for a few seconds. After that it is really deleted.

FAVORITE MESSAGES



Saved messages, with the question that produced them.

The Favorites tab lists each saved answer with the conversation it came from (“In "..."”), the date, Your question and the text (long ones start collapsed: Show more / Show less). Each has Open in chat (opens the conversation and highlights that message), Copy message and Remove. With none: “No favorite messages yet. Tap the star on a reply to save it here.”

DICTATE WITH THE MICROPHONE

The microphone button (Dictate with the microphone) types what you say into the box as you speak (“Listening… speak and the text will appear here”). Click it again to Stop dictation. The browser does the transcription: if it cannot, the button says so (“Try Chrome, Edge or Safari”).

> The assistant always answers about the whole account and the active update. There is no longer a session to pick or a "data sources" filter to set before asking.

LIMITS

Question length	Up to 4,000 characters.
Messages per minute	Up to 20 messages per minute for the whole company. Past that you see "Too many requests — please wait a moment before sending another message."

Conversation memory	Each answer takes the last 8 messages of the thread into account. Anything said much further up is no longer included.
Time per answer	Each answer has a time budget of a little over 20 seconds. If it runs out, the screen says so and your question stays in the box so you can retry it, or ask a shorter one.

RELATED

· The assistant: what it can answer and how it checks figures.

· Assistant privacy: which data goes to the AI provider and which never does.

· AI model: the provider screen in full.

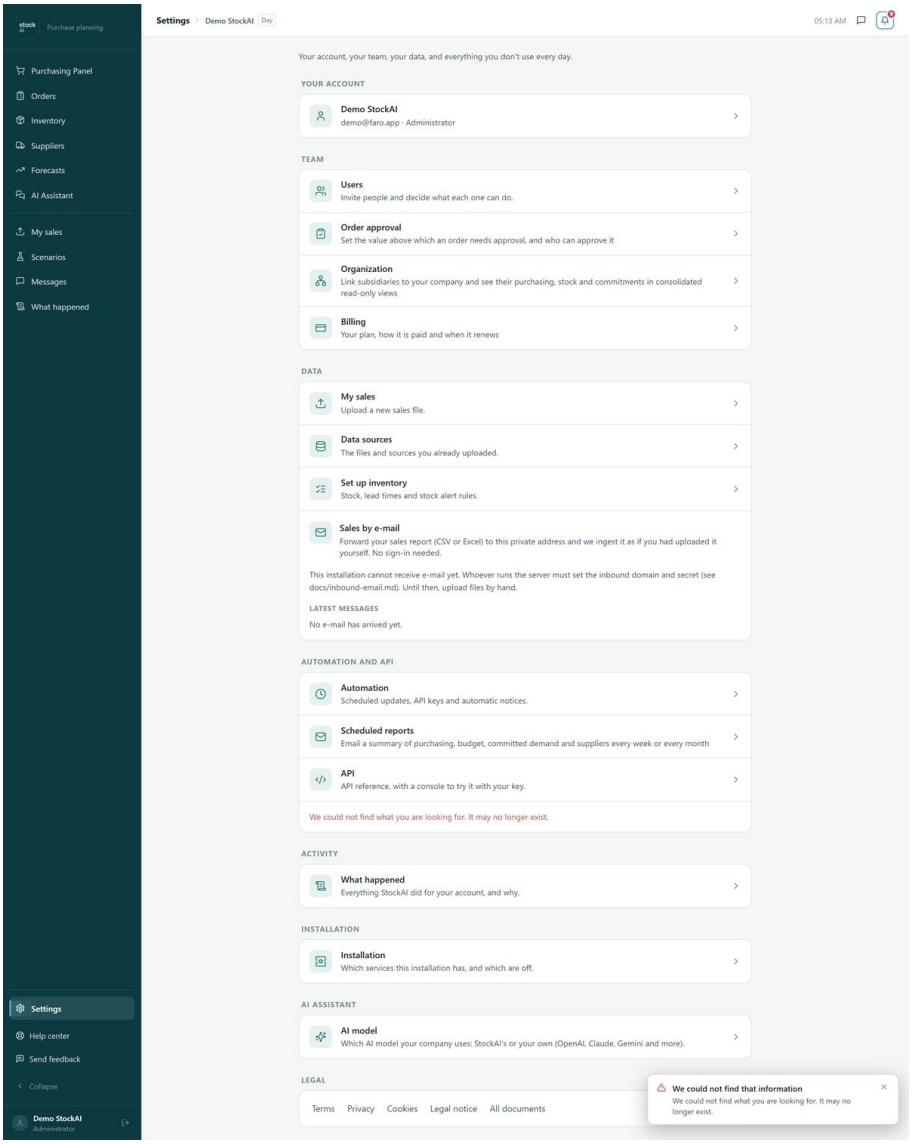
Settings

Account, billing, users, organization, AI model, reports, alerts, automation, API, installation and activity.

Settings: the index of every setting

The screen that gathers everything you do not use every day: your account, your team, your data, automation, activity and the installation. It edits nothing itself: each row opens the screen that does.

Open Settings from the last item of the sidebar, the gear. The sidebar only carries the daily screens; everything you set up once and check now and then lives here, one click away. The usual addresses still work, so you can also reach each screen by typing its route or from the command palette.



Settings as an administrator sees it. Each row links to another screen.

WHO SEES WHAT

Every role can open Settings, but not everyone sees the same rows. A row for something your role cannot use, or that your account does not need yet, is left out (it is not shown locked):

Row	Administrator	Analyst	Read only
Users, Order approval, Automation	Yes	No	No
Installation	Yes, if the account operates the installation	No	No
Organization, Billing, My sales, Data sources, Set up inventory, Scheduled reports	Yes	Yes	Yes
API	Once the account has an API key	Same	Same
What happened	Once there is more than one person in the account	Same	Same
AI model	Yes (edits it)	Yes (reads it)	No
Sales by e-mail and Continuous audit export cards	Yes	No	No

THE SECTIONS, ONE BY ONE

Your account	Your name, email and role. Opens My account.
Team	Users (invite people and decide what each can do, see Users), Order approval (the value above which an order needs approval, and who approves it), Organization (subsidiaries and consolidated views, see Organization) and Billing (your plan and how it is paid, see Billing).
Data	My sales (upload a new file), Data sources (what you already uploaded) and Set up inventory (stock, lead times and alerts).
Sales by e-mail	Administrators only. A private address you forward your sales report to (CSV or Excel), and StockAI takes it as if you had uploaded it, without signing in. If the installation cannot receive mail yet, the card says so and asks you to upload files by hand meanwhile. Below, Latest messages lists what arrived.
Automation and API	Automation (scheduled retraining, API keys and automatic notices, see Automation), Scheduled reports (see Scheduled reports) and API (see API screen). While nothing is connected, the Automation row reads "Optional: automatic alerts and updates to other systems".
Continuous audit export	Administrators only, inside Automation and API. Streams the audit trail to your security system (SIEM).
Activity	What happened: everything StockAI did for your account, and why. See Activity.

Installation	Which services this installation has, and which are off. See Installation.
AI assistant	AI model: which model your company uses, StockAI's or your own. See AI model.
Legal	Terms, Privacy, Cookies, Legal notice and All documents.

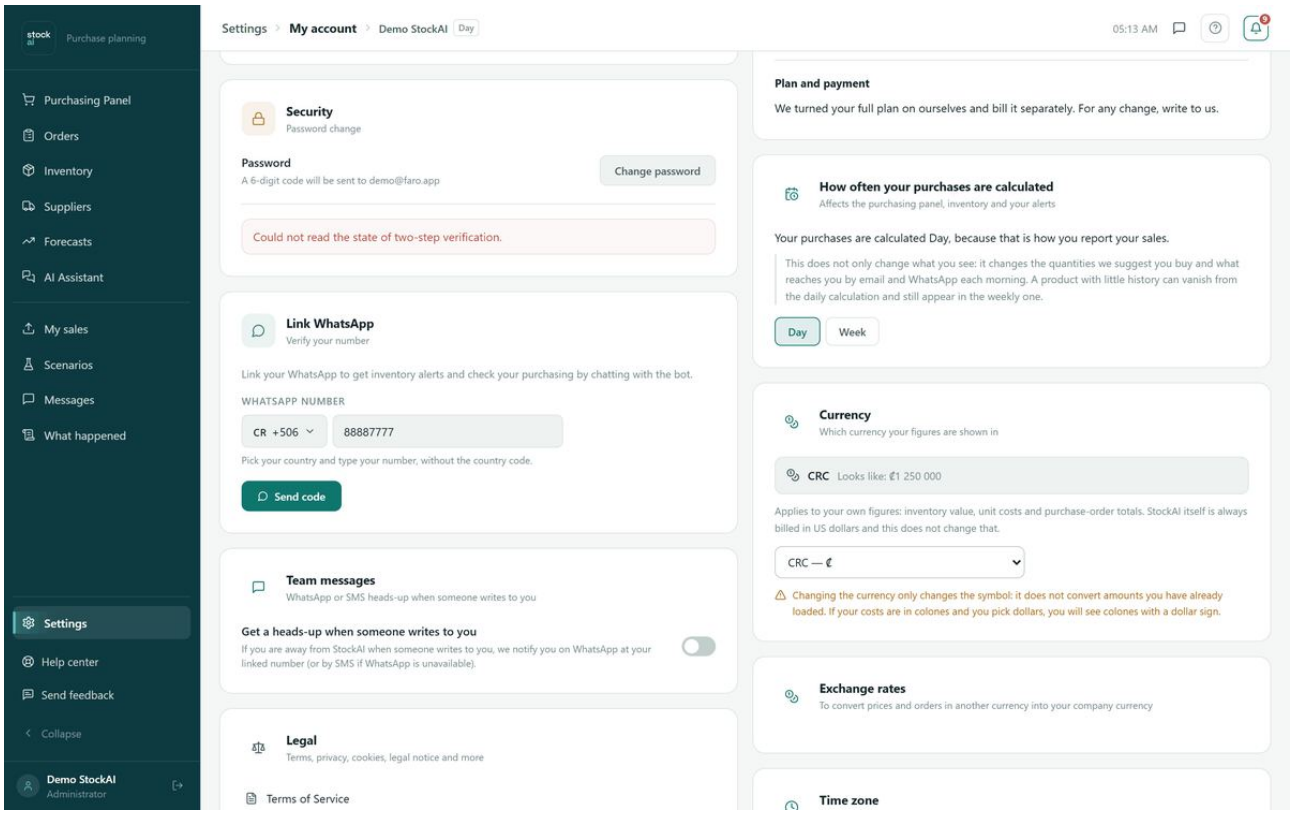
A row is missing?

If a screen is not there, most likely your role does not use it (Users, Automation and Installation are for administrators) or your account does not need it yet (API shows up once a key exists). Ask an administrator or type the route directly.

My account: profile, security, WhatsApp and company settings

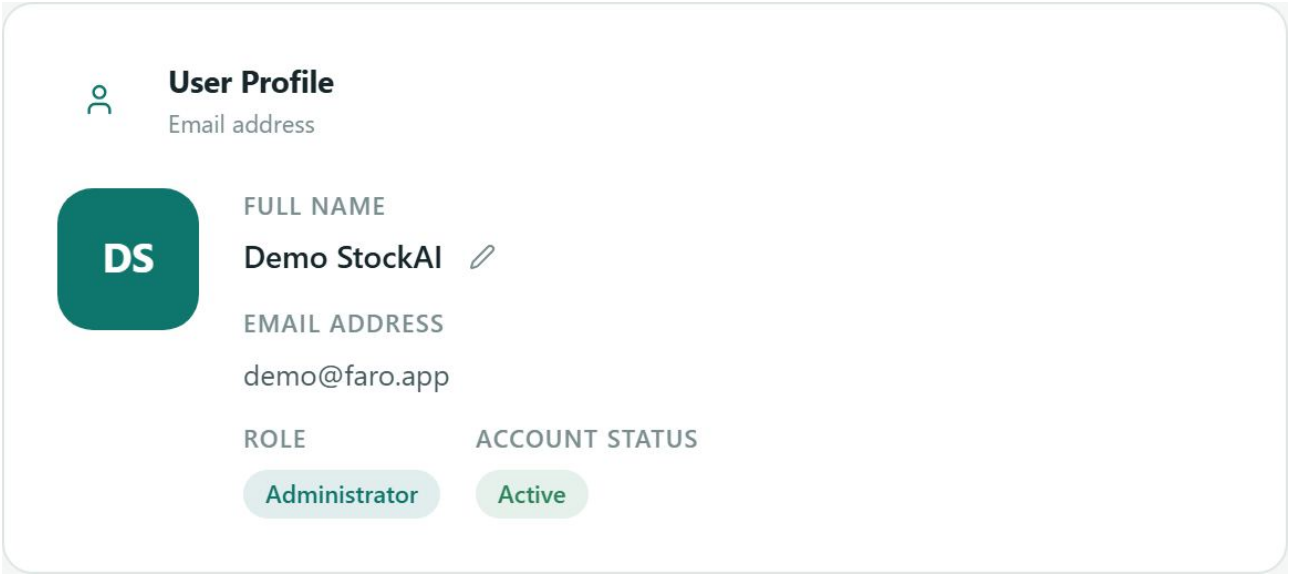
Your profile, your password and two-step verification, your WhatsApp, and — on the right — plan usage, currency, exchange rates, time zone and the account's activity log.

Open My account from Settings → Your account. On a computer the screen has two columns: on the left what is yours (profile, appearance, security, WhatsApp, team messages, legal), on the right what belongs to the company (usage and limits, calculation, currency, exchange rates, time zone). Below come a note on how StockAI calculates and the activity log. On a phone the same sections are a grouped list; tap one to open it.



My account. Any role opens it; what changes by role is noted in each section.

USER PROFILE

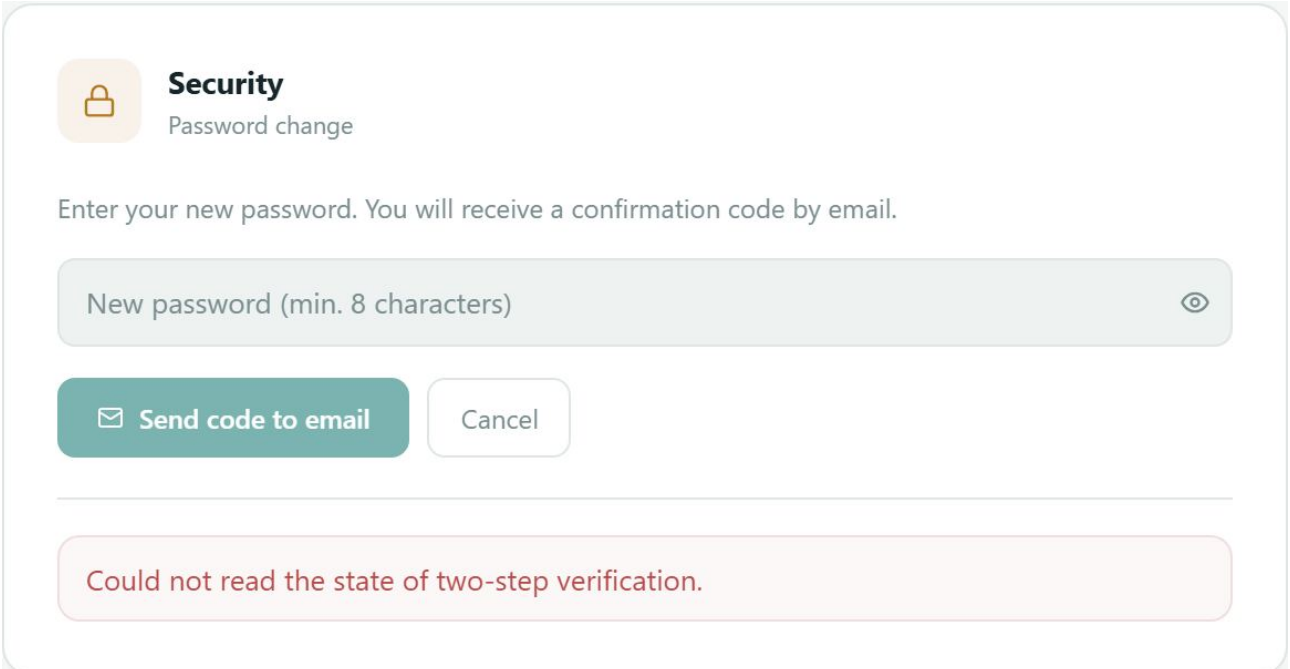


Full name	The one thing you change here. Press the pencil next to the name, type and save. The new name shows at once in the sidebar and in the Purchasing panel greeting.
Email address	Read only. An administrator changes it from Users, and the new address must be verified.
Role	Administrator, Analyst or Read only. An administrator changes it.
Account status	Active, Pending, Inactive or Suspended.

APP SETTINGS: LANGUAGE AND THEME

Language (Español / English) and Theme (Dark / Light). They are stored on your user, so they follow you to another browser. They only affect you.

SECURITY



Change your password

1. In Security, press "Change password".
2. Type the new password (at least 8 characters). The eye shows or hides it.
3. Press "Send code to email". A 6-digit code reaches your account's email.
4. Type the code and press confirm. If you mistyped the password, go back to the previous step.
5. You will see that the password was updated and the card returns to its first state.

> The code expires. If it runs out or you mistype it, the card says so in red; request a new one.

Two-step verification

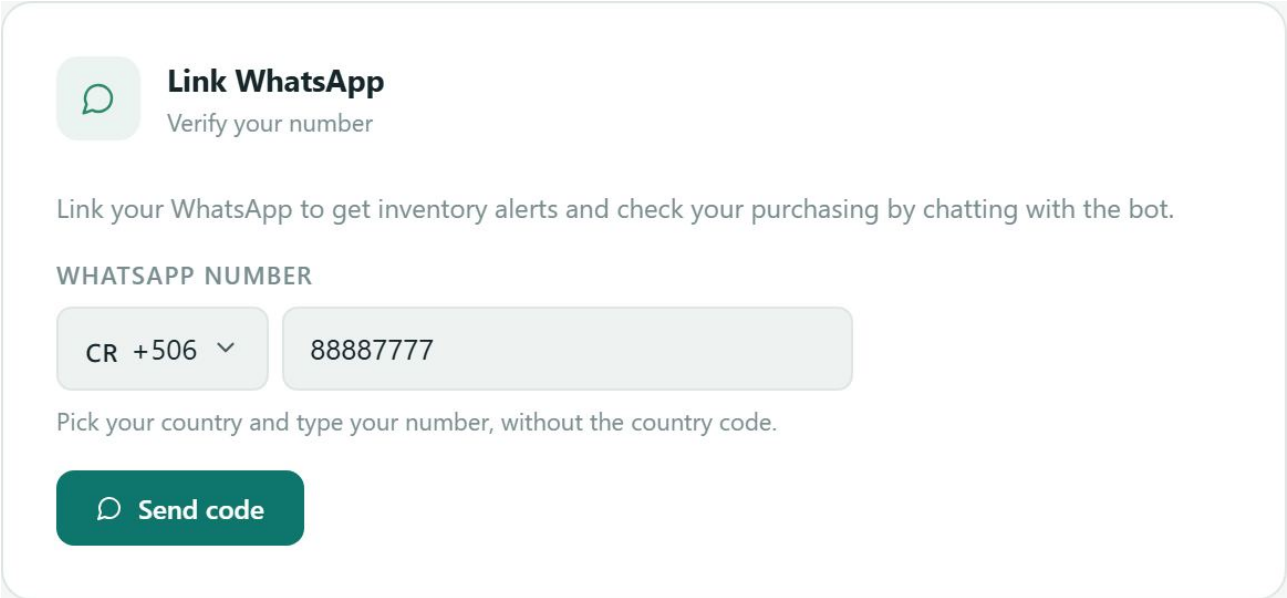
Below the password is two-step verification with an authenticator app. With "Turn on" you scan the QR code with your app, confirm with a code and keep the recovery codes (they help if you lose your phone). Once on, "Turn off" and "New recovery codes" ask for a code from your app (the old codes stop working).

An administrator also sees "Require it for the whole organization": anyone signing in with a password will have to set it up (people who sign in with Google, Microsoft or their company provider follow that provider's rules). To turn it on you must have it on your own account first, and turning it on signs out the people who had not set it up so they do it at their next sign-in. The administrator can also "Reset" it for a colleague who lost their phone: they lose the registered app and are signed out.

> If instead of these options you see "Could not read the state of two-step verification.", the server did not answer that part. The rest of the card works; try again later or tell whoever runs the installation.

If the installation offers sign-in with Google, Microsoft or Apple, this card also lists your linked accounts, each with an option to unlink it.

LINK WHATSAPP



With your number linked you get inventory alerts over WhatsApp (they come with the Pro, Max and Corporate plans).

1. Pick your country in the selector (the flag and prefix, for example +506).
2. Type your number without the country code.
3. Press "Send code". A 6-digit code arrives over WhatsApp.
4. Type the Verification code and press "Confirm". The card turns into "WhatsApp linked" with a "Verified" badge.

Resend code	Enabled after a wait ("Resend in Ns"). If you ask too soon, the screen tells you how many seconds are left.
Change number	Back to the form to link another number.
Unlink	Removes the number: alerts stop and the bot no longer recognises you.

> A number can only be linked to one account: if somebody else uses it you will see "This WhatsApp number is already linked to another account."

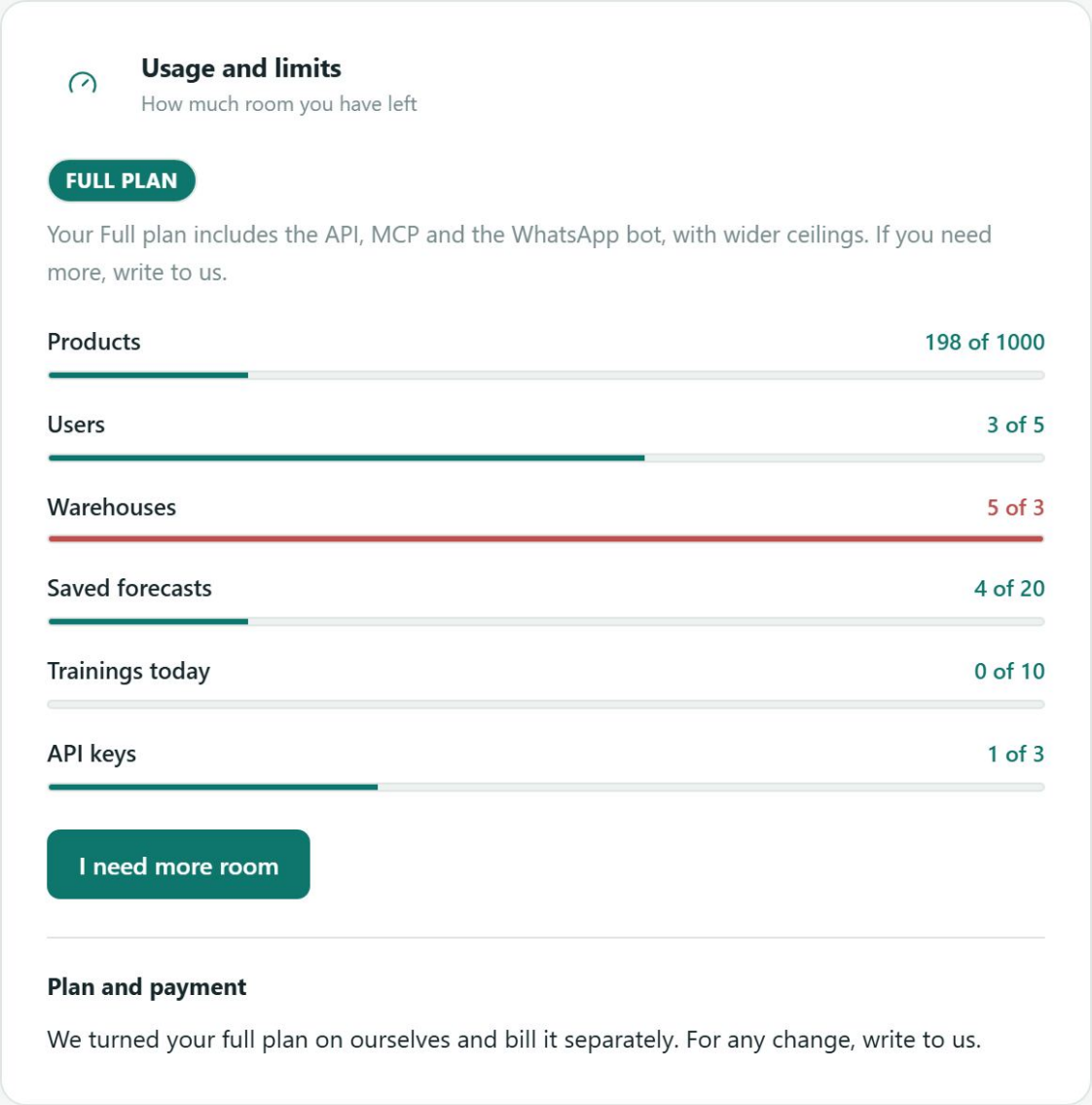
TEAM MESSAGES

The "Get a heads-up when someone writes to you" switch: if someone writes to you in Messages while you are away from StockAI, we notify you on WhatsApp at your linked number (or by SMS if WhatsApp is unavailable). It needs a linked number above; without one the card asks for it.

LEGAL

Links to the Terms of Service, Privacy Policy, Cookie Policy, Legal notice and All documents.

USAGE AND LIMITS

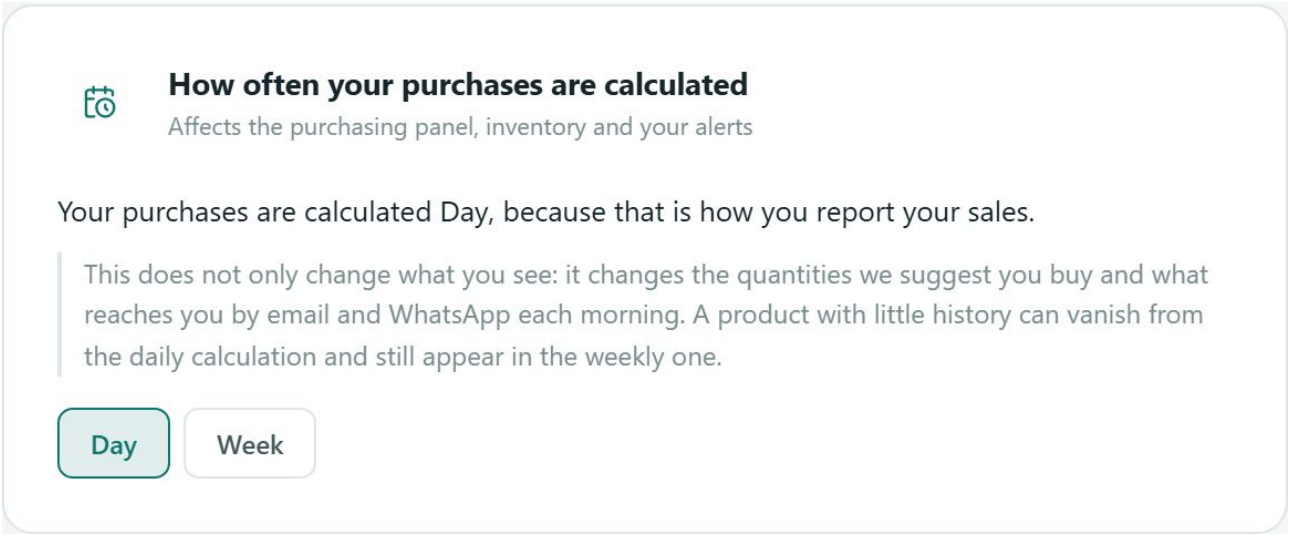


How much room your plan has left. At the top go the plan label and a sentence on what it includes; below, one bar per ceiling with current use and the maximum ("198 of 1000"). A red bar means you are at or over that ceiling.

Products, Users, Warehouses	How many you have against how many the plan allows.
Saved forecasts	Active sessions (archived ones do not count).
Trainings today	How many trainings you started today against the daily maximum.
API keys	How many active keys you have (only on plans with the API).
I need more room	Opens the dialog to write to us (see Billing).
Plan and payment	The same information as Billing: which plan you are on and how it is paid.

> Reaching a ceiling never deletes anything: it only stops you creating past it. What you already have keeps working.

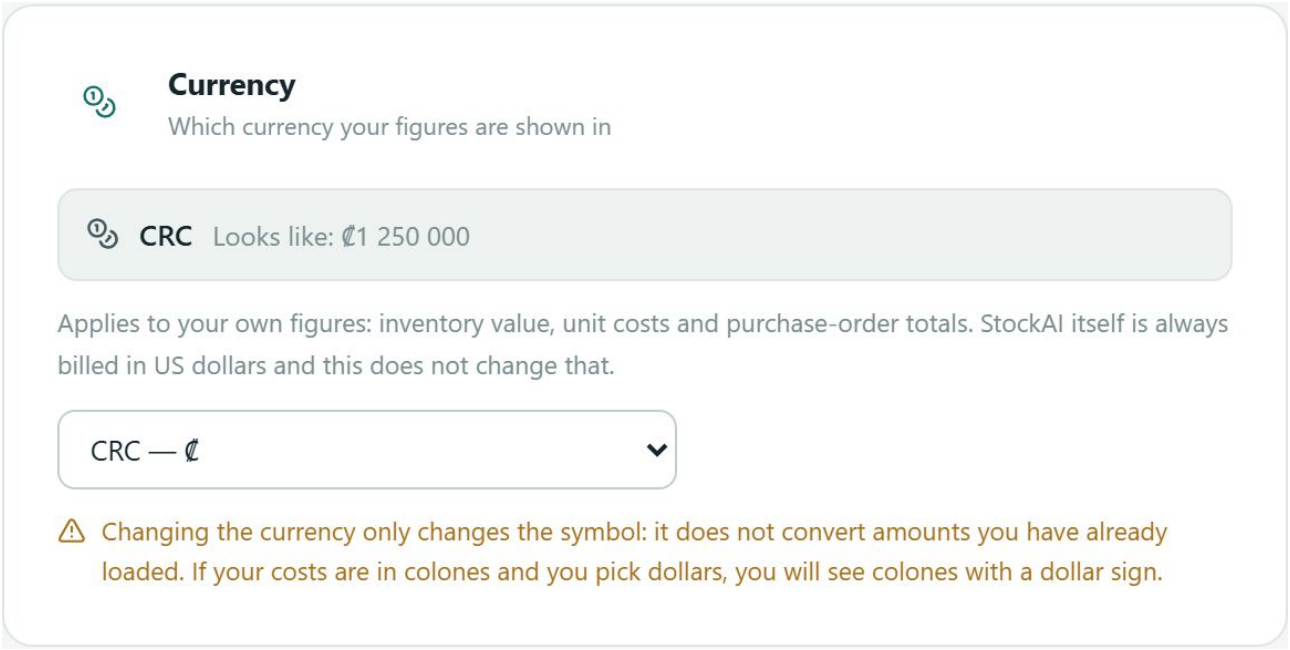
HOW OFTEN YOUR PURCHASES ARE CALCULATED



If your data supports both daily and weekly calculation, you choose here. The card explains why it is on the current option (for example, because that is how you report your sales). If your data only supports one option, the card does not appear.

> This does not only change what you see: it changes the quantities we suggest you buy, inventory, your alerts and what reaches you by email and WhatsApp each morning. A product with little history can vanish from the daily calculation and still appear in the weekly one. Only an administrator can change it, because it applies to the whole account.

CURRENCY



Which currency your own figures are shown in: inventory value, unit costs and purchase-order totals. The card shows how an amount looks ("Looks like: ₡1 250 000"). Only an administrator changes it, picking from the list (CRC, USD, MXN, GTQ, COP, PAB, HNL, NIO, DOP, PEN, CLP, ARS, EUR).

> Changing the currency converts nothing

It only changes the symbol. If your costs are in colones and you pick dollars, you will see colones with a dollar sign. To convert orders in another currency use exchange rates. StockAI itself is always billed in US dollars and this does not change that.

EXCHANGE RATES

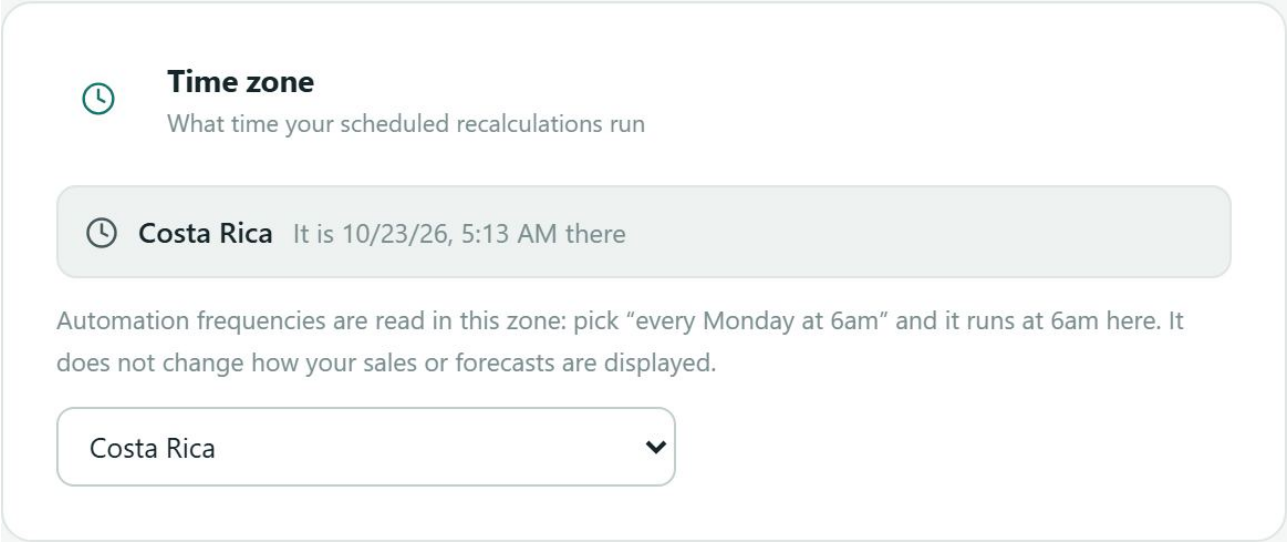
To convert a supplier's prices and orders in another currency into your company currency. An administrator enters the rates (StockAI does not look them up): currency, Rate (1 unit in your currency), Effective from and an optional Source ("E.g. Central bank, October 5"), then "Add rate". Each rate shows its state: In use, Not in effect yet or Superseded, and can be corrected or deleted.

· The latest rate that is not after the order date is used.

· The order keeps the rate it used: a new rate never changes an order already placed.

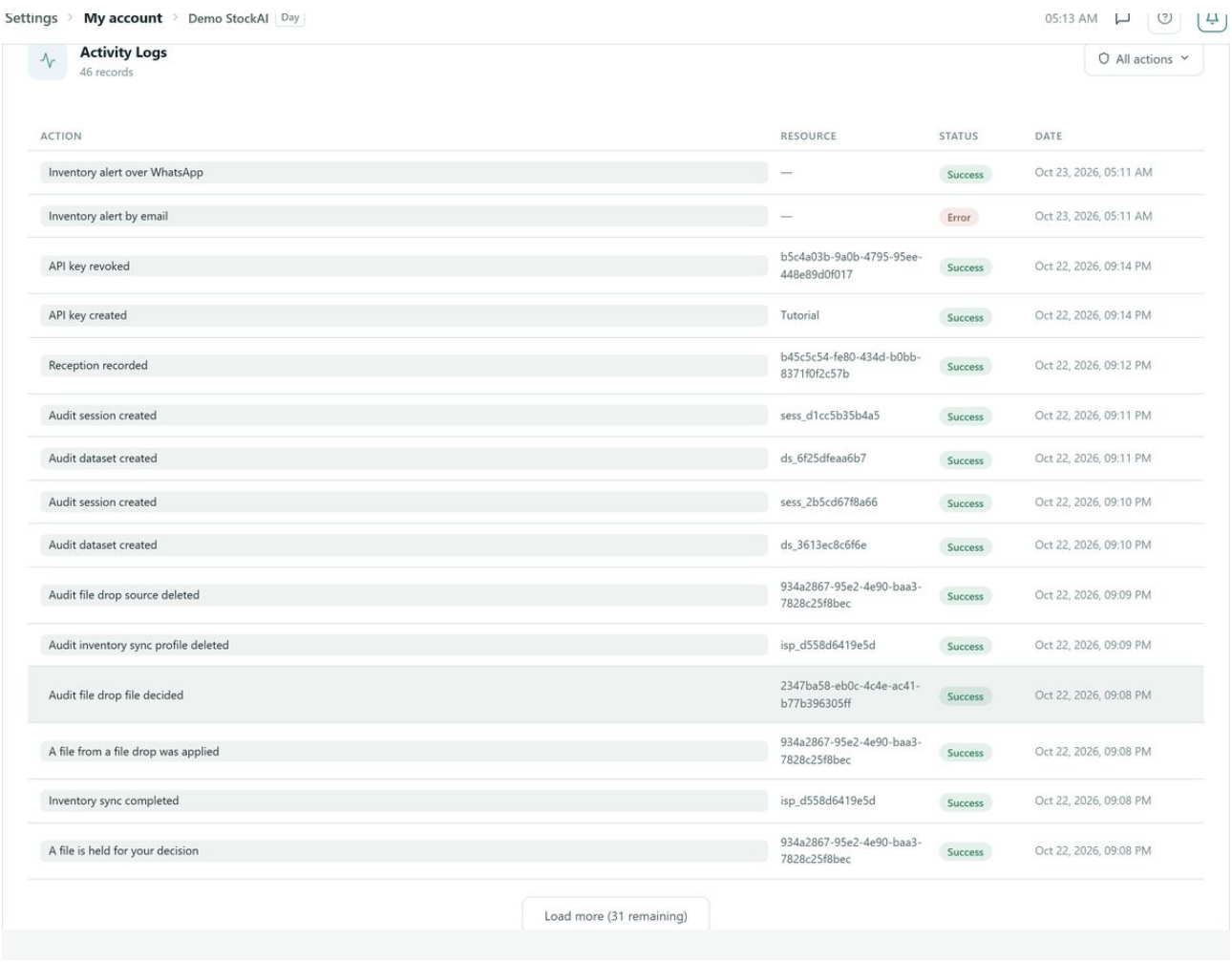
· With no rate, a line in another currency is not converted (never valued at 1): it is left out of totals and a hard budget will not let it through.

TIME ZONE



What time your scheduled recalculations run. The card shows the current time in the chosen zone. The frequencies in Automation are read in this zone: "every Monday at 6am" runs at 6am here. It does not change how your sales or forecasts are shown. Only an administrator changes it.

ACTIVITY LOGS

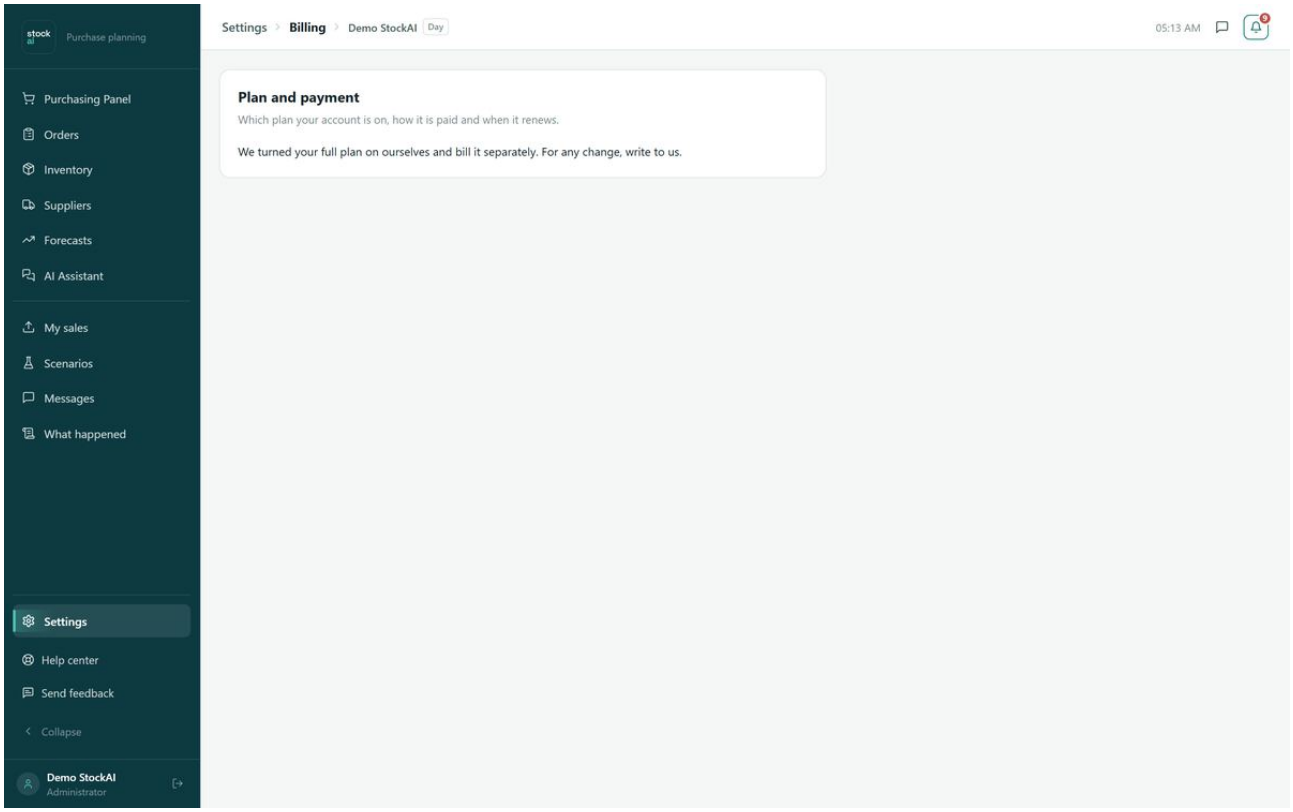


At the foot of the screen, the list of the account's actions: Action, Resource (the object's identifier), Status (Success or failure) and Date. The "All actions" filter narrows the list to one kind of action, and "Load more" brings the next 15. For the full history with who made each change, use the Audit trail tab of What happened.

Billing: your plan and how it is paid

Which plan your account is on, how it is paid and when it renews, and how to ask for more room or move to Pro or Max.

Open Billing from Settings → Team → Billing. The same information appears in My account → Usage and limits, under "Plan and payment". Any role can see it; only an administrator pays or manages the subscription.



The demo account has its plan turned on by us, so the card shows one sentence and no buttons.

THE PLANS

Free	Free for good, with short ceilings and no API, MCP or WhatsApp alerts. Those three show as locked, with the dialog to write to us.
Full	Wider ceilings and the first plan with the API, MCP and WhatsApp alerts. The only plan that can be bought online.
Corporate	Everything included, with the ceilings agreed in a quote. Arranged by writing to us, never online.

Every other screen is on every plan. Your account's exact ceilings are in Usage and limits.

THE PLAN SENTENCE

The Plan and payment card says in one sentence who decides how your plan is paid:

- "You are on the free plan."
- "Your {Pro or Max} plan renews on {date}, by {Stripe or PayPal}."
- "Your {Pro or Max} plan stays active until {date}." (you cancelled the renewal; on that day the account moves to the free plan with nothing deleted).

· "We turned your {Pro or Max} plan on ourselves and bill it separately." (a plan set by hand: there is nothing to pay here).

· "Your corporate plan is billed under your contract."

· "This is a trial account." (24-hour trial accounts cannot subscribe; create an account with your email).

MOVE TO PRO OR MAX

On the free plan the "Move to Pro or Max" box appears. If the installation sells both plans you pick one first (Pro is preselected; each option shows its price and how many products, users and warehouses it holds), and below it there is one button per payment method: Card (Stripe), Link and PayPal. What each plan includes is in Plans and limits.

· If the installation has online payments configured, the box shows each plan's price ("{price} a month") and each button takes you to Stripe's or PayPal's own payment page. Your payment details never pass through StockAI. Only an administrator sees the buttons; others read "Paid plans start at {price} a month. Ask an administrator of your account to subscribe."

· If it does not, the three buttons are dimmed with a "Coming soon" tag and the note "Online payments are not active yet. Write to us to activate your plan." An administrator also sees which variables the installation is missing, to ask whoever runs it.

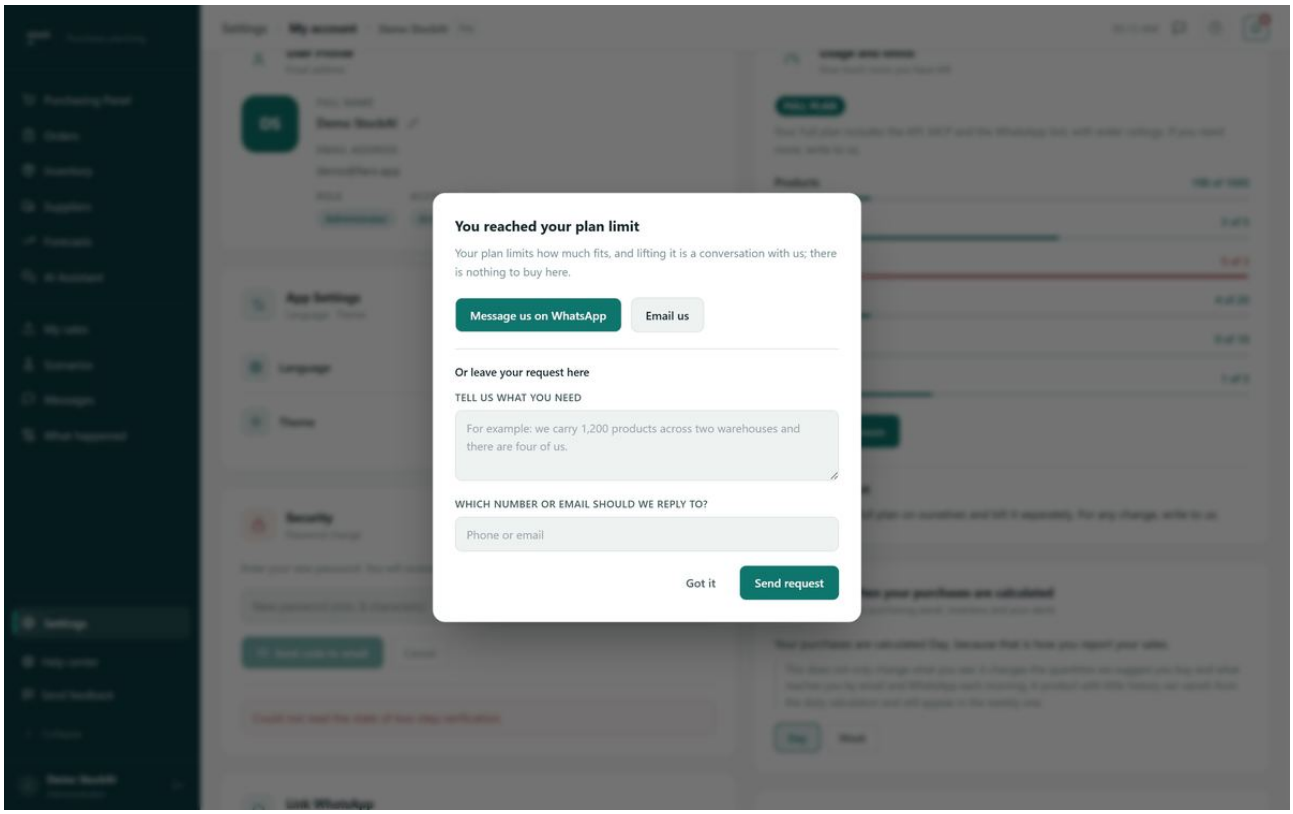
Coming back from the payment page

Coming back to StockAI is not the payment being confirmed: the plan only changes when Stripe or PayPal tells us. So you will see "Confirming your payment" (do not close the page or pay again) and, within seconds, "You are on the Pro plan" (or Max). If it takes more than a minute and a half the screen says "The payment notice is taking a while": do not pay again; if nothing shows within an hour, write to us. If you came back without paying you will see "The payment was not completed" and nothing was charged.

Manage the subscription

With a subscription paid online an administrator sees "Manage subscription", which opens the Stripe portal or your PayPal account (under Automatic payments) to change the card or cancel. If a charge fails, "We could not charge your plan" appears at the top with the deadline and an "Update payment method" button: after that date the account moves to the free plan. Nothing is ever deleted; you just cannot create past the ceilings.

WRITE TO US FOR MORE



This dialog opens from "I need more room" in My account, and by itself when you try to create something past a ceiling or use a feature your plan does not include (then it says which ceiling you reached, for example "Products: 100 of 100").

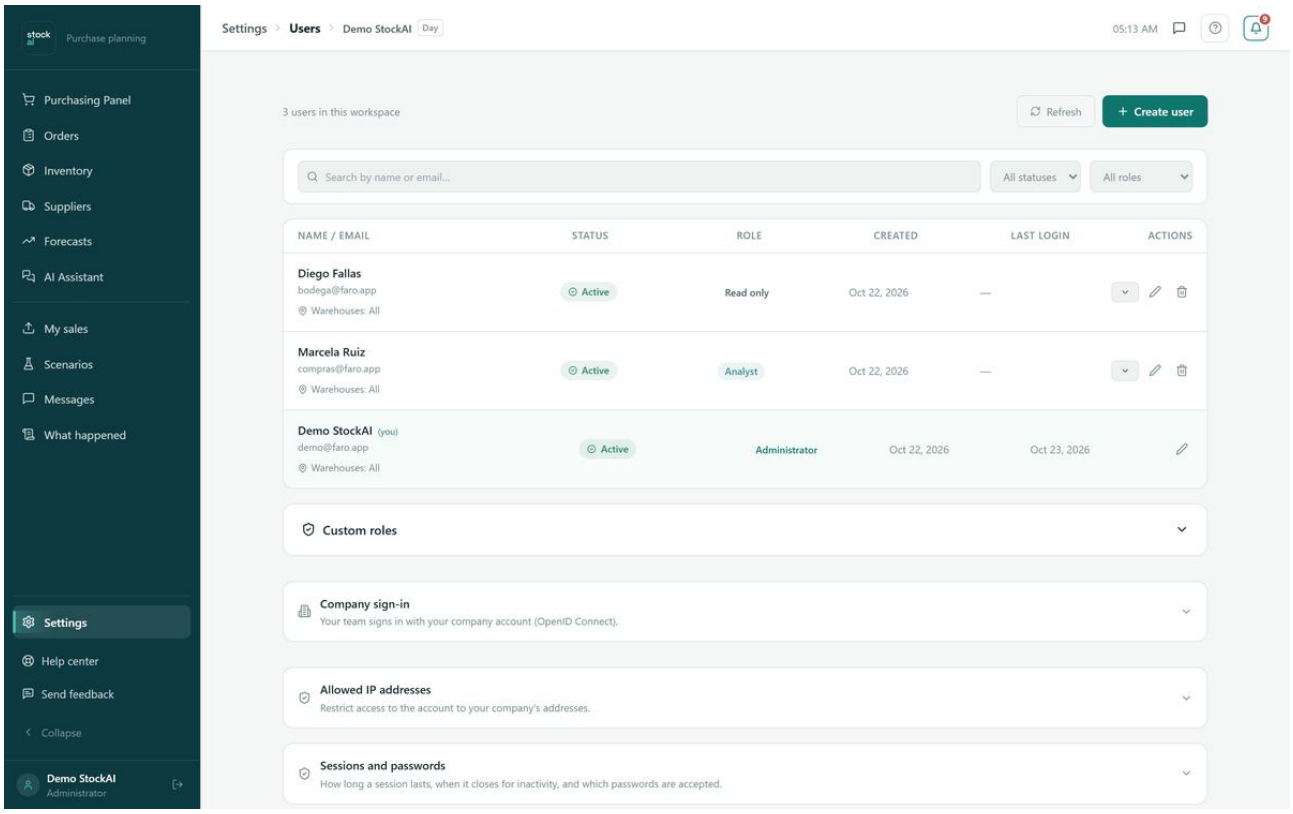
1. Choose "Message us on WhatsApp" or "Email us": the conversation opens with a message already written.
2. Or, without leaving the page, fill in "Tell us what you need" and "Which number or email should we reply to?" and press "Send request". You will see "We got your request. We will be in touch shortly."
3. "Got it" closes the dialog.

> If the installation has no contact channel configured, the write-to-us buttons do not appear.

Users: invitations, roles, warehouses and access

Who signs in to your account and what they can do: invite people, change their role, limit the warehouses each one sees, suspend or delete them, and the company's access policies.

Open Users from Settings → Team → Users. It is an administrators-only screen: an analyst or read-only user who opens the address sees "You don't have permission to view this page."



The account's people. Your own row carries "(you)".

THE THREE ROLES

Administrator	Everything, including inviting people, changing roles, Automation, the plan and company settings.
Analyst	Works with the data: uploads sales, trains, approves and generates orders, schedules reports. Does not manage people or the account.
Read only	Sees screens and reports; changes nothing.

Can…	Administrator	Analyst	Read only
See every screen, forecast, stock signal and order	Yes	Yes	Yes
Use the assistant and message the team	Yes	Yes	Yes

Can…	Administrator	Analyst	Read only
Upload sales, train, and edit inventory, suppliers and signal rules	Yes	Yes	No
Create, send, receive, mark paid and cancel purchase orders	Yes	Yes	No
Save scenarios, schedule recalculations and create API keys	Yes	Yes	No
Create, edit, suspend and delete users	Yes	No	No
Change the currency, the time zone and how often purchases are calculated	Yes	No	No
Configure the company's channels under Installation	Yes	No	No

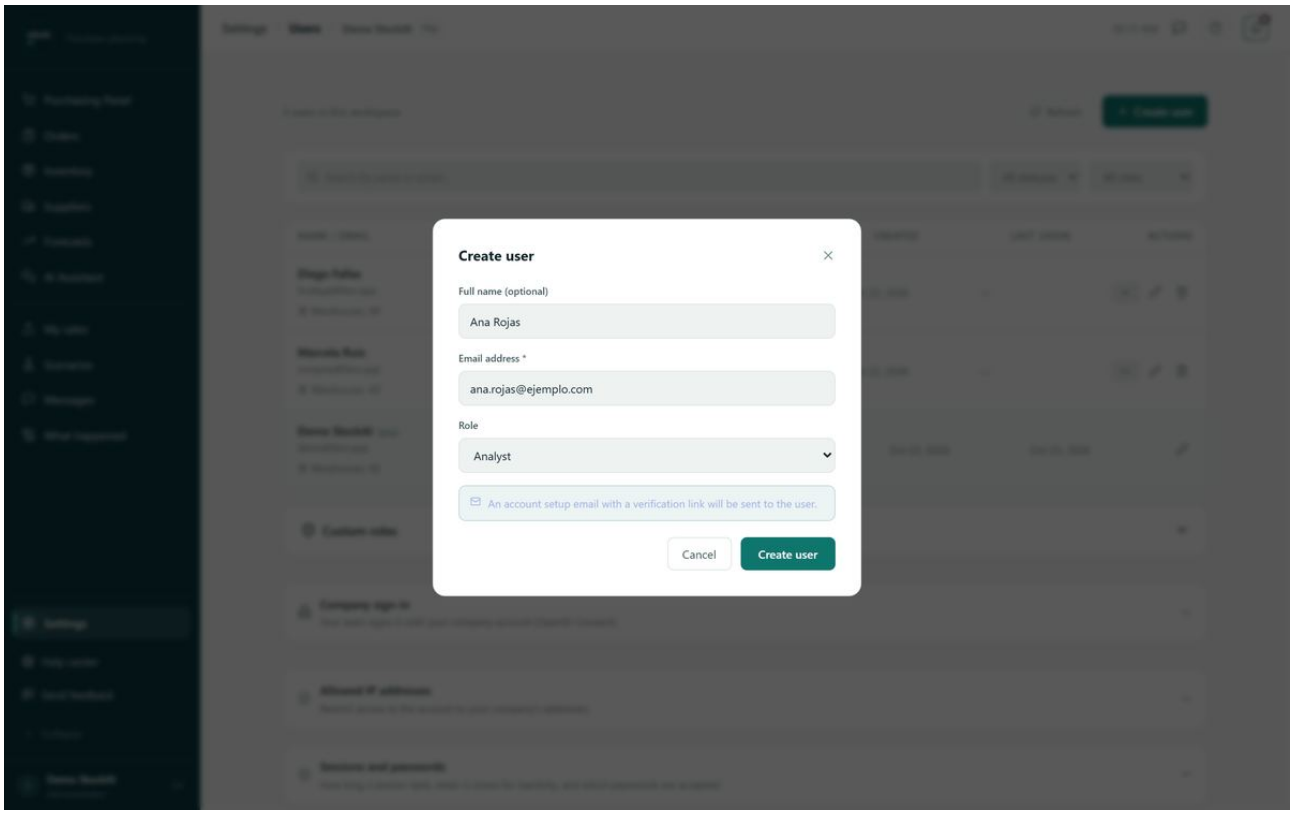
Authorization is by role only. If someone must be able to do less than their role allows, use a custom role (below).

THE LIST

Counter	"3 users in this workspace".
Refresh	Reads the list again.
Search by name or email…	Filters as you type.
All statuses	Active, Pending (invited, email not confirmed yet), Inactive or Suspended.
All roles	Administrator, Analyst or Read only.
Name / Email	Under the email you may see Warehouses (if the company has two or more) and the custom role.
Created / Last login	When the account was created and when it last signed in ("—" if never).
Actions	Change status (arrow), Resend verification email (envelope, Pending only), Edit (pencil) and Delete (bin). Your own row only has Edit.

With more than 20 people, paging appears at the foot. If you are the only person in the account, instead of a one-row table you will see "Invite whoever buys with you" with the button to create a user.

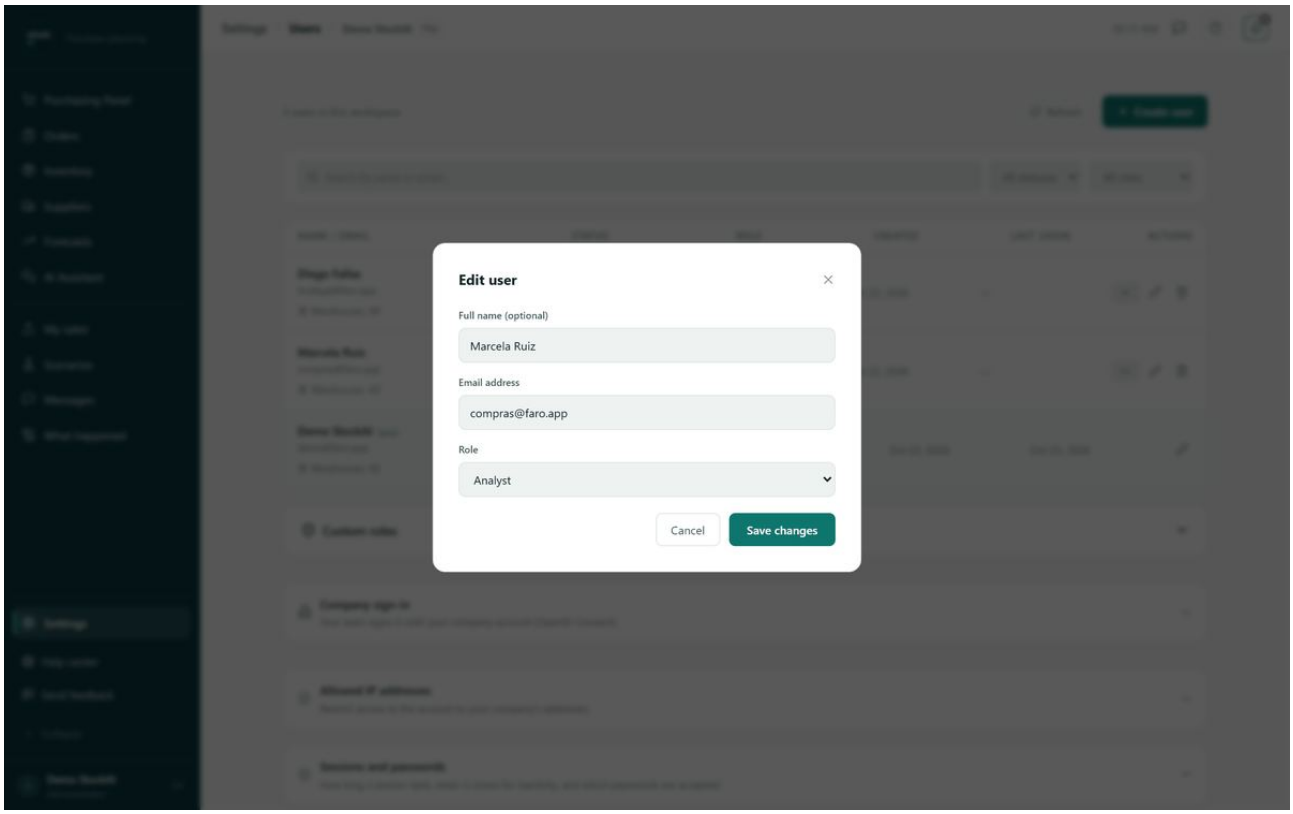
INVITE SOMEONE



1. Press "Create user".
2. Type the Full name (optional) and the Email address (required).
3. Choose the Role. The default is Analyst.
4. Press "Create user" in the dialog. The person appears as Pending and receives an account setup email with a verification link.

If the email did not arrive, press the envelope on their row (Resend verification email). Your plan's user ceiling is in My account → Usage and limits; once reached, creating another opens the dialog to write to us.

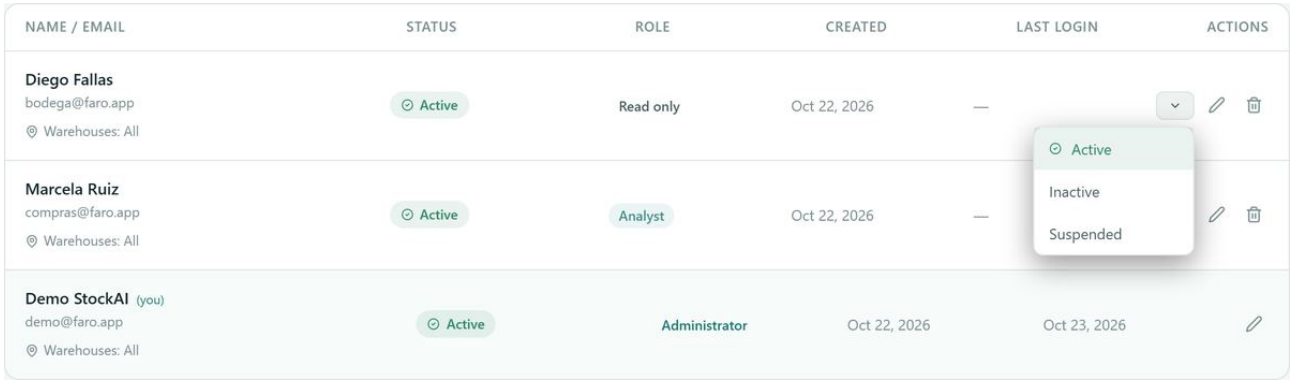
CHANGE THE NAME, EMAIL OR ROLE



1. Press the pencil (Edit) on the row.
2. Change the name, email or role.
3. Press "Save changes".

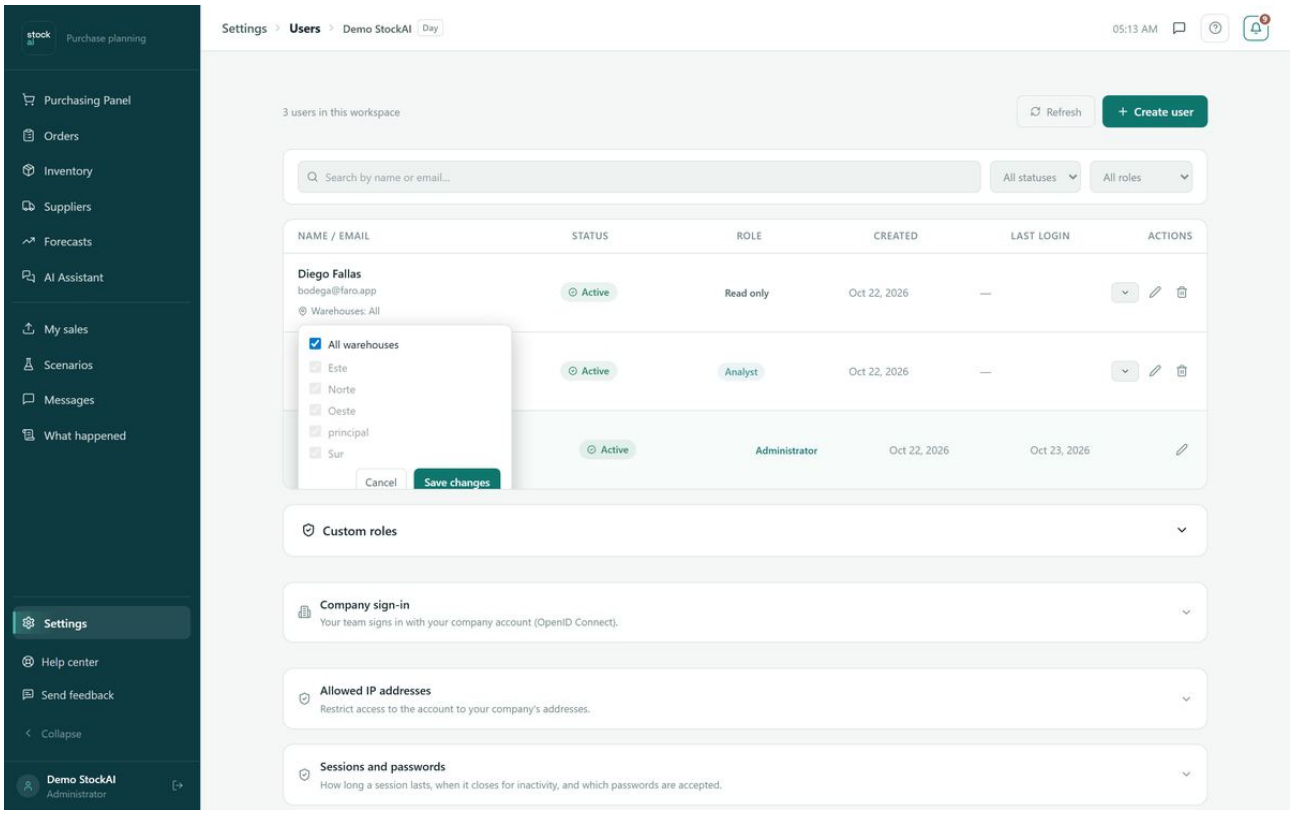
> Changing the email requires verifying it again: the dialog warns you as soon as you edit it.

DEACTIVATE OR SUSPEND



The row's arrow (Change status) opens a menu with Active, Inactive and Suspended; the current status is ticked. An inactive or suspended person cannot sign in, but their history (approved orders, changes) is kept, and you can set them back to Active any time. You cannot change your own status.

LIMIT A PERSON'S WAREHOUSES

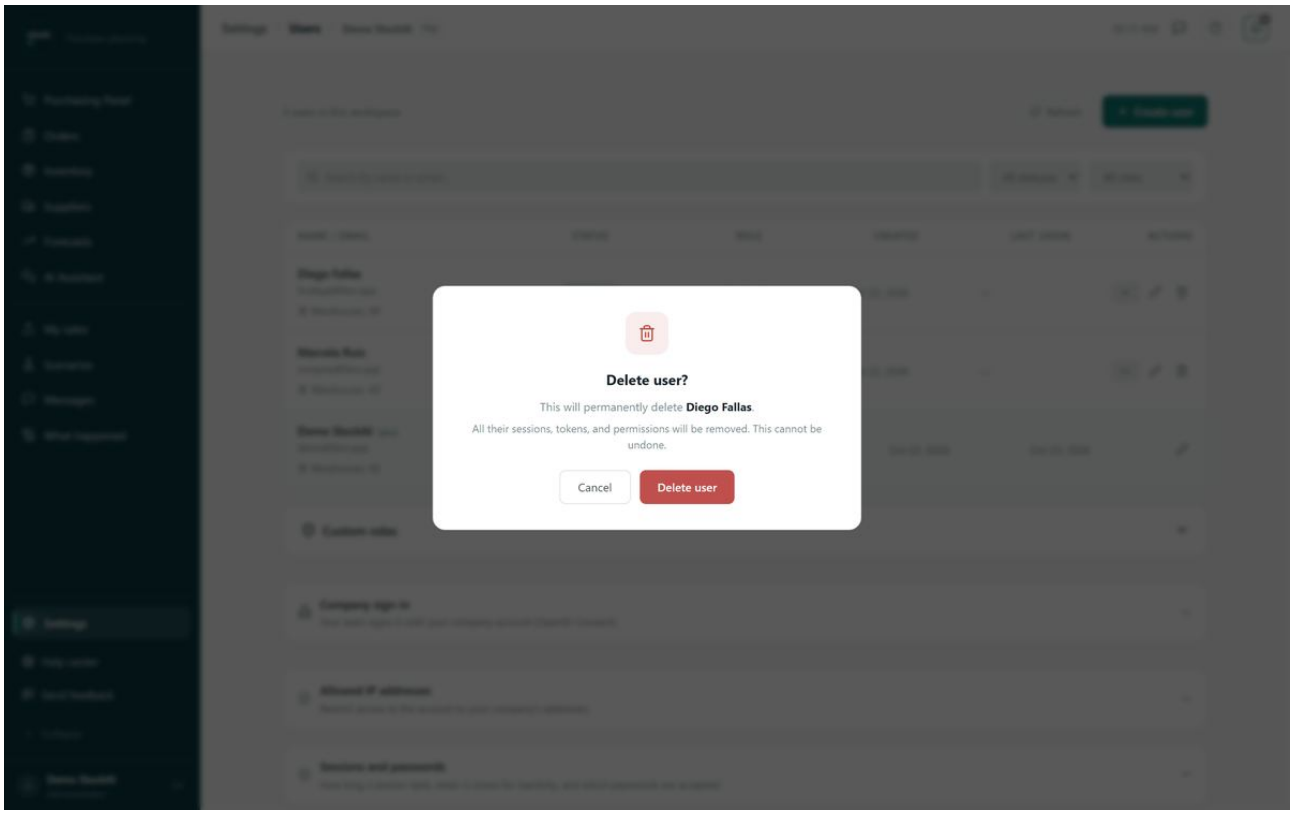


If your company has two or more warehouses, each row shows Warehouses: All (or others). That control decides which warehouses the person can see and change.

1. Press "Warehouses: ..." under the person's email.
2. Untick "All warehouses" and tick only the ones they should see.
3. Press "Save changes" (or "Cancel" to leave everything as it was).

> With no warehouse ticked, the person will not see any warehouse: "none" never means "all". A person with limited warehouses also does not receive scheduled reports, which cover the whole company. You cannot limit your own warehouses.

DELETE SOMEONE

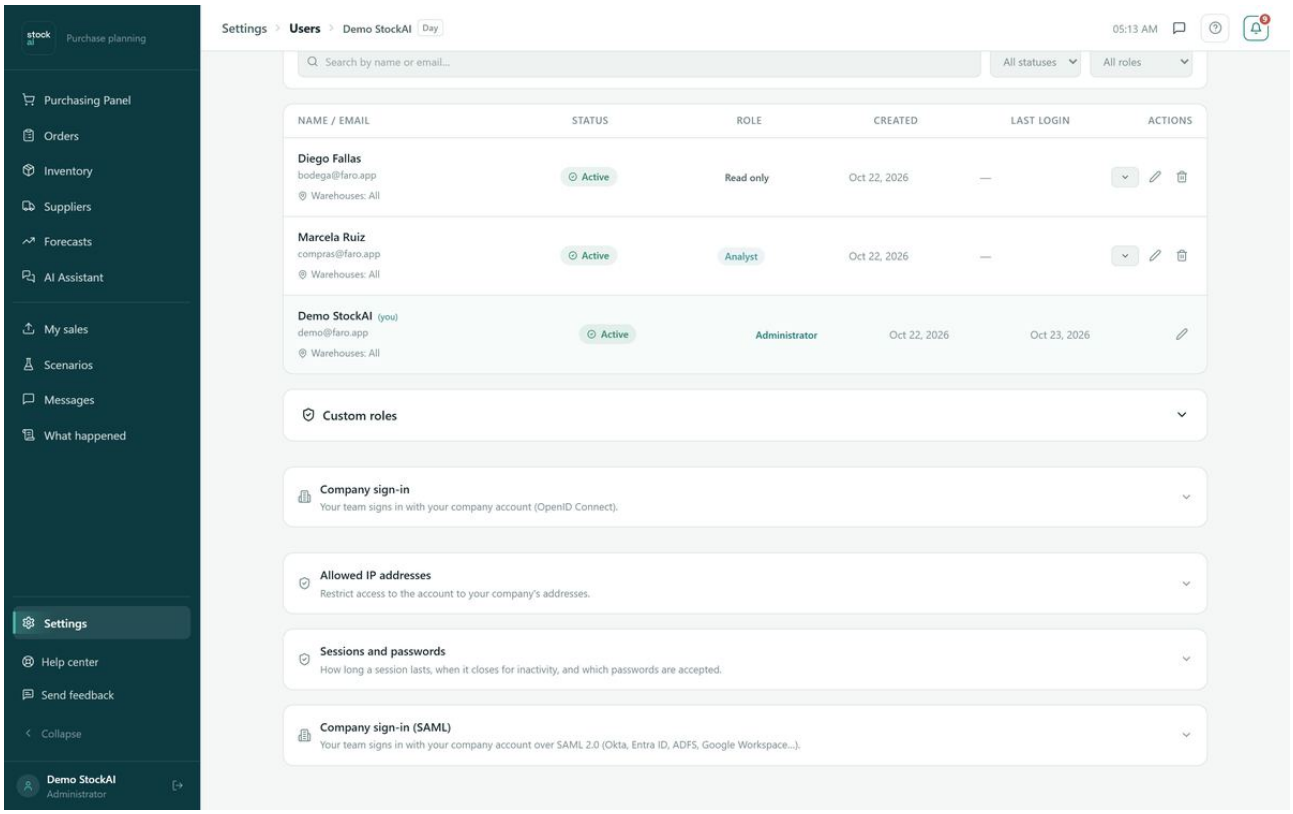


The bin opens "Delete user?". Confirming with "Delete user" removes their sessions, tokens and permissions. It cannot be undone. If you only want to cut their access, set them Inactive: that is reversible. You cannot delete yourself.

USER LIMIT

An account can have a ceiling on users. Trying to create one more than the ceiling opens the "You reached your plan limit" dialog with the ways to reach us. See Usage limits.

COMPANY ACCESS



At the foot of the screen are five folded cards; press one to open it.

Custom roles	A custom role is a named set of permissions that narrows what a person can do within their role; it never grants more. With "New role" you type a name and description and tick the permissions. Then, on each person's row, you choose their custom role. The server enforces it on every click.
Company sign-in	Your team signs in with your company account (OpenID Connect): issuer, client ID and secret, the company's email domains, the role for new people, an optional group-to-role table and "make it mandatory". The secret is never shown again. SCIM provisioning (people added and removed automatically from your identity provider) lives inside it too.
Allowed IP addresses	Restricts the account to your company's addresses. The card shows the address the server sees for you and whether the entries cover it; the server refuses a change that would lock you out.
Sessions and passwords	How long a session lasts, when it closes for inactivity, how many sessions at once, minimum password length and age, upper-case and symbols, and lockout after failed attempts. Empty or off means "no limit". Below, the accounts locked right now, each with an unlock button.
Company sign-in (SAML)	The same over SAML 2.0 (Okta, Entra ID, ADFS, Google Workspace...): first what your provider needs from StockAI (entity ID, ACS URL and downloadable metadata), then the provider's details. An account uses OpenID Connect or SAML, not both.

> If the installation has company sign-in switched off, the OpenID Connect and SAML cards say so in one sentence and show no form. It is switched on in Installation.

Organization: subsidiaries and consolidated views

Link your subsidiaries' accounts to the parent company's and see their commitments, stock, orders and budget in consolidated read-only views.

Open Organization from Settings → Team → Organization. A parent company sees its subsidiaries in consolidated views; each subsidiary accepts the link with its own administrator and each person at the parent is given access one by one. Nothing can be changed from here: no account writes into another.

WHO SEES WHAT

· Consolidated views: anyone (any role) whom a parent administrator gave access to at least one subsidiary.

· Linked subsidiaries and Join an organization: administrators only.

· If the account is not part of any organization you will see "This account is not part of an organization". If you are not an administrator, the screen adds that only an administrator can create codes, accept links or give access.

LINK A SUBSIDIARY (PARENT ADMINISTRATOR)

1. In Linked subsidiaries, type the Subsidiary name (only you see it; the subsidiary does not).
2. Press "Create code". The Link code appears with a "Copy" button.
3. Copy it now: it is not shown again, and it expires on the date the card gives. Hand it to the subsidiary's administrator.
4. Until the subsidiary accepts it the link reads "Waiting for the subsidiary" (or "Code expired" once the date passes).
5. Once accepted the link turns Active and shows the subsidiary's name. Under "Who can see it", pick a person in "Choose a person" and press "Give access". "Remove access" takes it back.

JOIN AN ORGANIZATION (SUBSIDIARY ADMINISTRATOR)

1. In Join an organization, paste the Link code the parent gave you.
2. Press "Accept link". The card turns into "This account is a subsidiary" and names the parent.

From then on the parent sees read-only summaries of your commitments, stock, orders and budget. It does not see other subsidiaries, and other subsidiaries do not see you. Ended links stay under "Earlier links".

END A LINK

Either side can press "End link" and confirm. If the parent ends it, the views stop including that subsidiary and every access is removed; if the subsidiary ends it, the parent stops seeing its data immediately. Linking again takes a new code.

THE CONSOLIDATED VIEWS

The Consolidated views card says which companies it covers ("Covers: …") and has "Refresh" and four tabs:

Commitments	Per company: commitments, units, weighted units, overdue and the next delivery, with the total and a monthly breakdown.

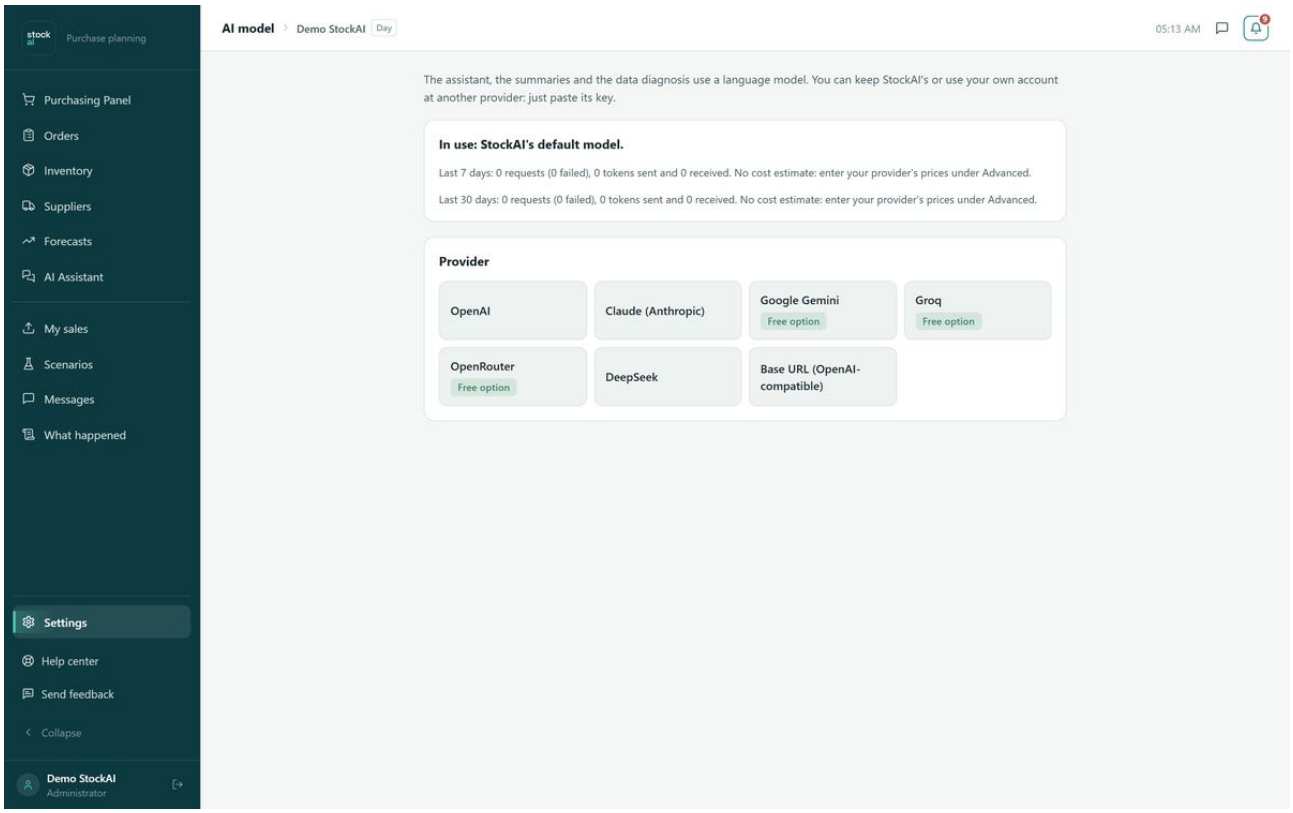
Stock by signal	Per company: its state (Counted, Out of date, Incomplete or Not calculated), products, how many are in each stock signal and the inventory value. A company with stale figures is dimmed and listed as excluded, not added to the total.
Purchase orders	Orders, cancelled, not sent, sent, awaiting payment, awaiting reception and their value. A picker chooses the last 30, 90, 180 or 365 days.
Budget and spend	Each running budget of each company: period, budget, spent, committed and remaining (red when over).

> Different currencies are never added together: each total is in its own currency. A company that could not be read is named in red under the table instead of being silently left out.

AI model: StockAI's or your company's

Which language model the assistant, summaries and data diagnosis use: StockAI's default or your own account at OpenAI, Claude, Gemini, Groq, OpenRouter, DeepSeek or a compatible server.

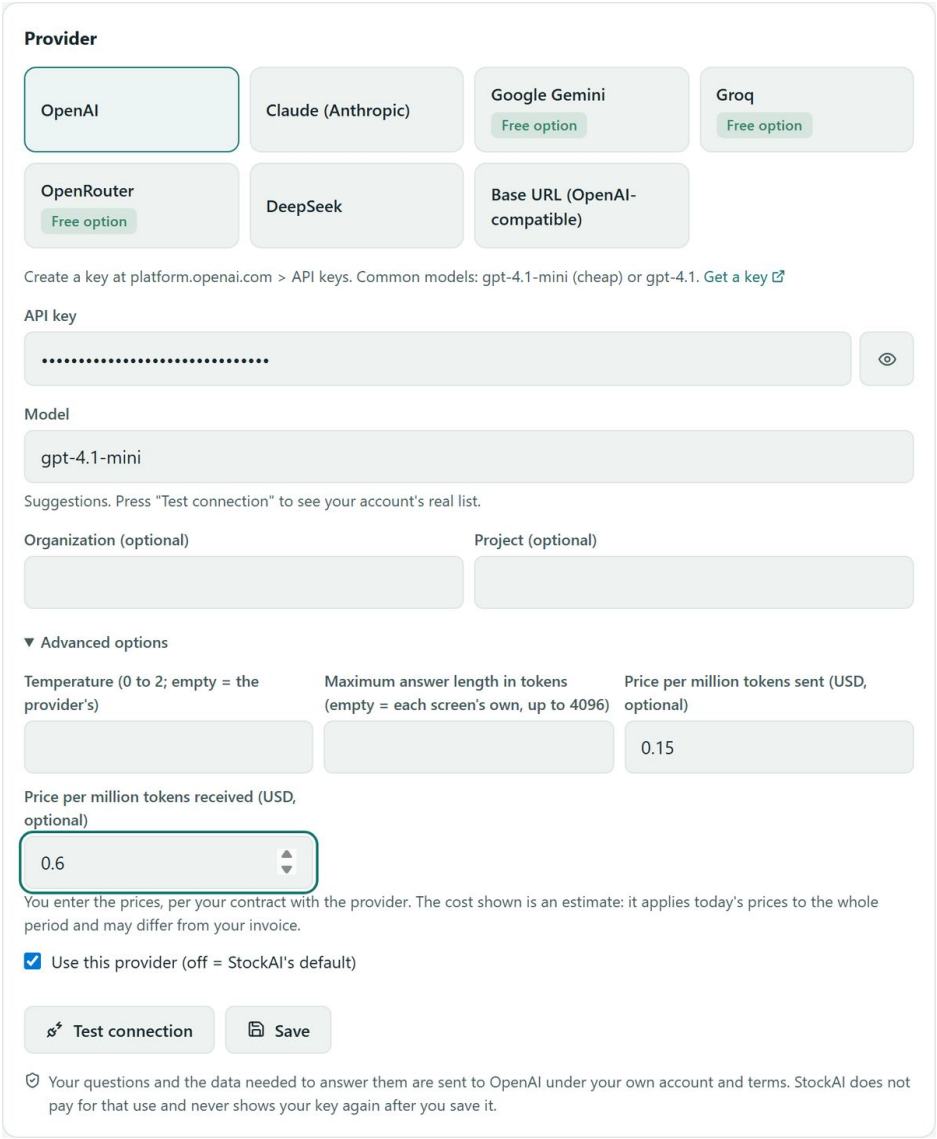
Open AI model from Settings → AI assistant. An administrator edits it; an analyst sees it read-only ("Only an administrator can change the AI provider."); a read-only user does not see it.



WHAT IS IN USE

In use	"StockAI's default model" or "{provider} · {model}" if the company chose its own. If the installation has no StockAI model, it tells you to choose your own provider to turn the assistant on.
State	With your own provider: Working, Failing, Paused (it failed 5 times in a row; retried by itself after a short wait or when you press "Test connection") or Retried on the next request.
Last successful answer / Last problem	When it last answered correctly and, if it failed, which problem it had and how to fix it.
Last 7 and 30 days	Requests (and how many failed), tokens sent and received, and the estimated cost if you entered your provider's prices. Without prices it says "No cost estimate".

USE YOUR OWN PROVIDER



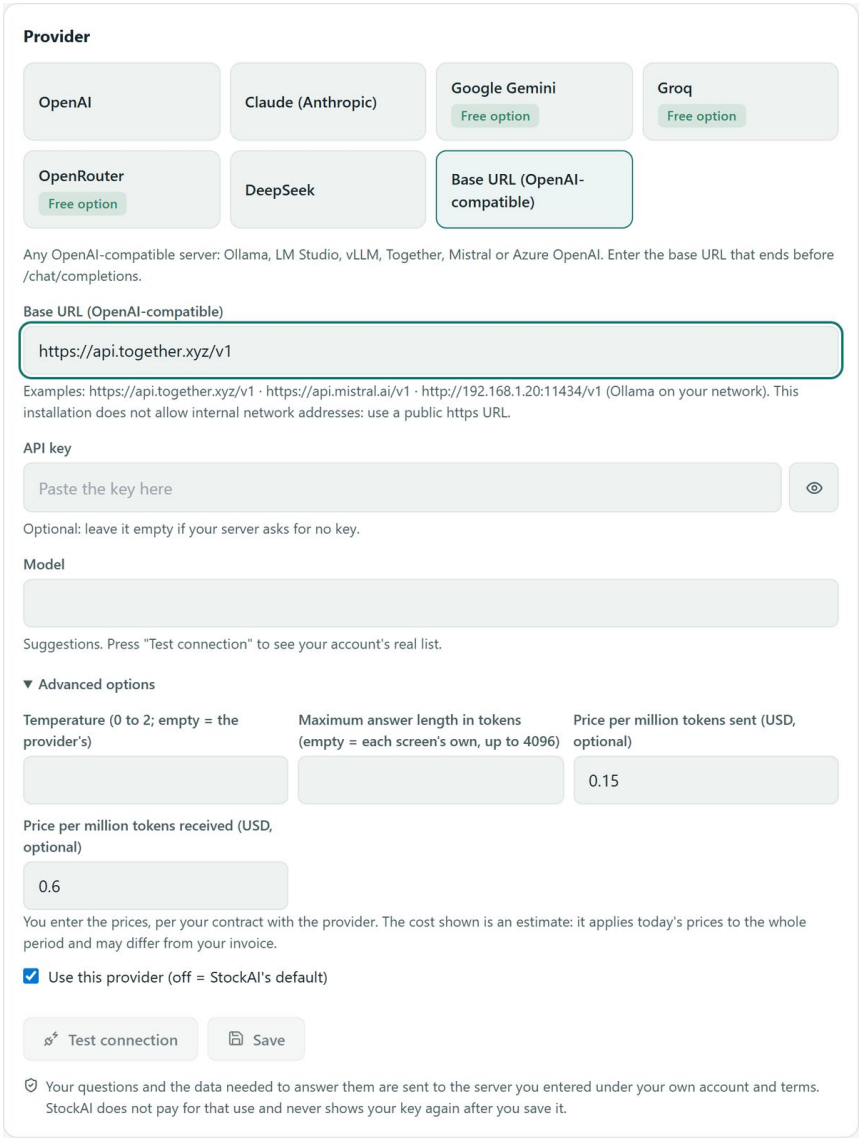
Form filled with a made-up key, not saved.

1. Under Provider, pick one: OpenAI, Claude (Anthropic), Google Gemini, Groq, OpenRouter, DeepSeek or Base URL (OpenAI-compatible). Those with a free tier carry a "Free option" badge (with the provider's usage limits).
2. Read the provider's hint and, if you have no key, press "Get a key" (opens the provider's page).
3. Paste the key into API key. The eye shows or hides it.
4. Check the Model: a suggested one is filled in; you can type another or pick from the list.
5. Press "Test connection": it tests what is in the form without saving it and answers "Connection works: {model} answered in N ms", or the problem. After a successful test the model list becomes your account's real one.
6. Press "Save". You will see "AI provider saved" and the box at the top switches to your provider.

Organization / Project (optional)	Only for providers that use them (OpenAI).
Advanced options → Temperature	From 0 to 2. Empty = the provider's.

Maximum answer length in tokens	Empty = each screen's own, up to the maximum in the label.
Price per million tokens sent / received	In US dollars, per your contract. With them the screen estimates the cost; it is an estimate that applies today's prices to the whole period and may differ from your invoice.
Use this provider	Off: the settings are kept but StockAI's default is used.

An OpenAI-compatible server



For Ollama, LM Studio, vLLM, Together, Mistral or Azure OpenAI: enter the Base URL that ends before `/chat/completions`. The key is optional if your server asks for none. If the installation does not allow internal network addresses, the hint says so: use a public https URL.

BACK TO THE DEFAULT

With a provider saved, "Back to StockAI's default" appears. Confirming deletes the saved key and the assistant goes back to StockAI's model.

> No silent fallback

If your provider fails, the assistant does not answer from StockAI's model instead: it answers from your data and says which problem the provider had, and this screen shows the same problem with its remedy. Your questions and the data needed to answer them go to your provider under your account and terms; StockAI does not pay for that use and never shows your key again after you save it (only its last characters).

Scheduled reports: summaries by email

A summary of purchasing, budget, committed demand and suppliers that reaches the people you choose by email every week or every month.

Open Scheduled reports from Settings → Automation and API. Administrators and analysts define them; a read-only user sees "Scheduled reports are set up by administrators and analysts." The screen itself sends nothing: the server sends at the scheduled time, in the company time zone (My account → Time zone).

A report says "Not available" when it cannot compute a figure, instead of making one up.

CREATE A REPORT

1. Press "New report". New scheduled report opens, with you already ticked as a recipient.
2. Type the Name.
3. Choose the Frequency: Every week (with the Day of the week) or Every month (with the Day of the month, up to the 28th so it exists every month).
4. Choose the Time (in the company zone).
5. Under What it includes, tick the sections (see below).
6. Under Who receives it, tick people of your account. Optionally type External emails separated by commas (only those an administrator allowed).
7. Press "Preview" to see how it would look today (for you only; nothing is sent), then "Save". Save is enabled with a name, at least one section and at least one recipient.

Purchasing summary	Orders generated, sent and received in the period.
Budget versus spend	What each running budget has spent and committed.
Committed demand	Open and fulfilled commitments, and how many are at risk.
Supplier on-time scorecard	Which suppliers meet their declared lead time.

> Only active people with access to every warehouse receive it, because the report covers the whole company. An account can have up to 10 scheduled reports; at that point the button is disabled and the screen says so.

EACH REPORT'S CARD

Frequency	"Every Monday at 06:00 (… time)" or "On day N of every month…".
Sections	The ones it includes.
Next send / Last	When the next one goes out and how the last one went (queued, building, skipped or failed). "Not sent yet" if it never went out.
Recipients	Each person or address; if one will not receive it, it says why (asked not to, deactivated, limited warehouses, no longer allowed…).
Paused	Paused by a person, because it failed several times in a row, or because nobody is left to receive it. It is not sent until you resume it.

Buttons: Preview, History (each run with its status, how many emails were sent, pending, failed or dropped, and skipped recipients), Edit, Pause / Resume and Delete.

> Deleting a report stops its sends and deletes its history. To stop it for a while, use Pause.

ALLOWED EXTERNAL EMAILS

Only the addresses on this list can receive reports outside your account. An administrator types the address and presses "Allow", or "Remove" to take it off; an analyst sees the list but cannot change it. Every email sent carries a link to stop receiving it.

Daily alerts and summaries

What StockAI sends you without opening the app: the daily notice of products at risk, suppliers running late, the stale-data reminder and the monthly recap.

StockAI checks your inventory every day at 8:00 UTC (2:00 in Costa Rica) and notifies whoever can act. If the server was down at that time, the check runs as soon as it is back, without skipping the day.

WHAT IS SENT

Stockout notice	Only when products are at Order NOW or Order soon. The email lists SKU, name, signal, coverage, how much to order and supplier, with a button to open the inventory. A day with no products at risk sends nothing.
Suppliers running late	When a supplier is taking longer than their own history. Sent even when stock looks healthy, which is exactly when it matters.
Stale data	A reminder when your sales file or your stock has gone too long without an update and the signal can no longer confirm how much you have left.
Monthly recap	On the first day of each month, the summary of the month that closed (orders, adoption, overstock). Not sent if that month had no orders or history is missing. It is the same one you see in Impact.

WHO RECEIVES IT

· By email: every admin and analyst in the company. Read-only users do not, because the notice is a call to act.

· By WhatsApp: admins and analysts with a number under "WhatsApp (inventory alerts)" in My account. With several warehouses, the message adds how many transfers are suggested.

> How to stop receiving it
>
> There is no switch for the email: every admin and analyst receives it. To stop it on WhatsApp, leave the WhatsApp field in My account empty. The "Get a heads-up when someone writes to you" switch is for Messages, not for these alerts.

Email goes out through the installation’s channel, or your company’s if you set one under "My channels" in Installation. With no email or WhatsApp configured, nothing goes out: see Email and WhatsApp.

THE BELL AND "WHAT HAPPENED"

Every send — the ones that went out and the ones that failed — is recorded. The bell in the top bar gathers what matters (critical items and those needing attention, including failed sends and trainings that finished or failed), and the What happened screen keeps the full history, filterable by topic and importance, for every role.

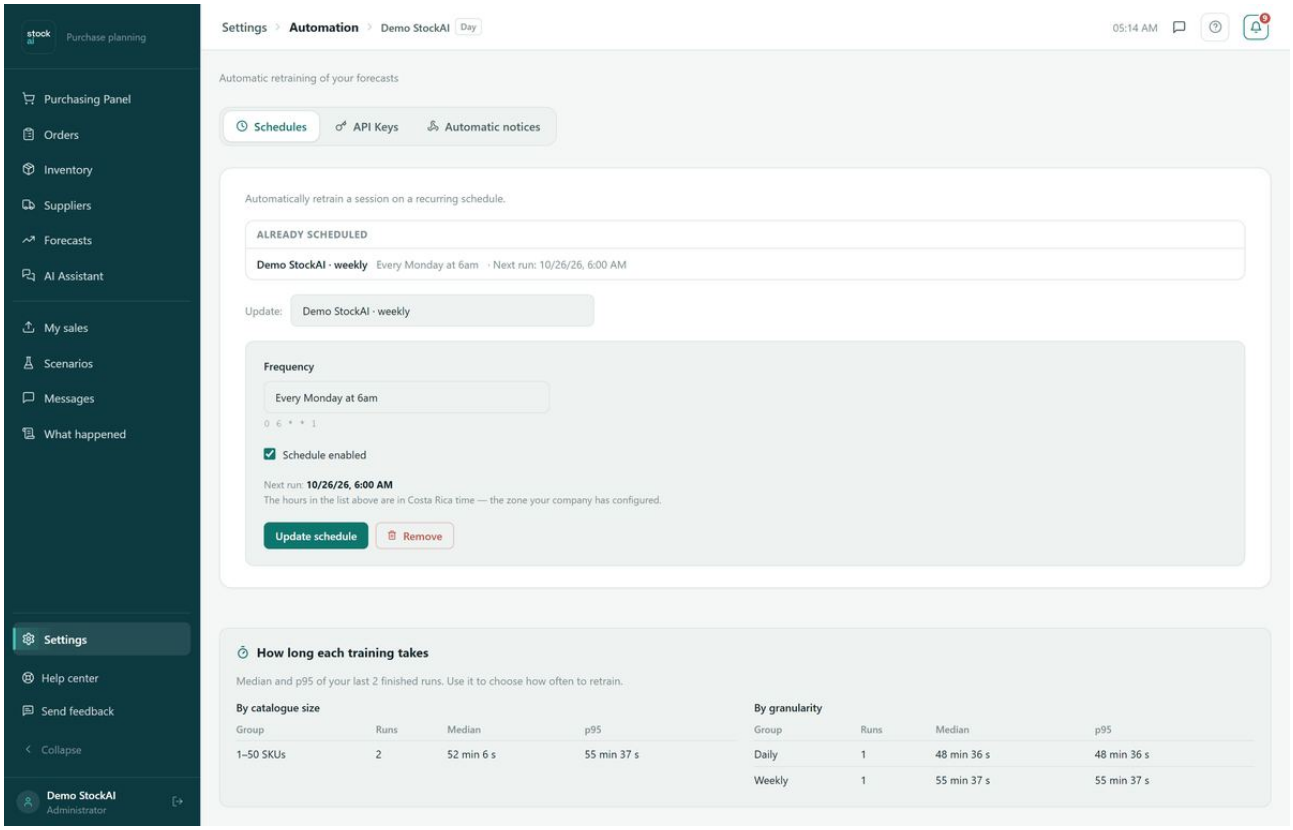
> If nothing arrived one day
>
> Check "What happened" first: if the send failed, it is there with the reason. If there is nothing, most likely no products were at Order NOW or Order soon that day.

Automation: retraining, API keys and notices

Schedule your forecasts to refresh by themselves, create the keys another system uses to call the API, and set up automatic notices (webhooks) to your systems.

Open Automation from Settings → Automation and API. It is an administrators screen with three tabs: Schedules, API Keys and Automatic notices. The last two need a plan with the API (Full or corporate); on the free plan they show as locked with the dialog to write to us.

SCHEDULES



Retrains a session (an "update") automatically on a recurring schedule, so the stock signals and suggested purchases are calculated with your newest data without anyone starting it.

1. Under Update:, choose the session (only completed ones are listed).
2. Under Frequency, choose: Every Monday at 6am, Every day at midnight, Weekdays at 6am, Every Sunday at 8am, Every hour or First day of month. The technical expression shows below (for example `0 6 * * 1`).
3. Leave Schedule enabled ticked (untick it to pause the schedule without deleting it).
4. Press "Save schedule" (or "Update schedule" if it existed). You will see "Saved." and the Next run.

Already scheduled	Every schedule in the account, of any session, with its frequency and next run, or "last run failed" with the reason. Press one to edit it.
Time zone	The hours are read in the company zone, the one in My account; the screen reminds you below.
Remove	Deletes that session's schedule (asks to confirm).

Recent scheduled runs	Each run: finished, failed, running, queued, cancelled or did not run, with the reason (no new data, the previous run was still going, the source could not be refreshed, daily training cap reached…).
How long each training takes	Median and p95 of your latest runs, by catalogue size and by granularity. Use it to choose how often to retrain.

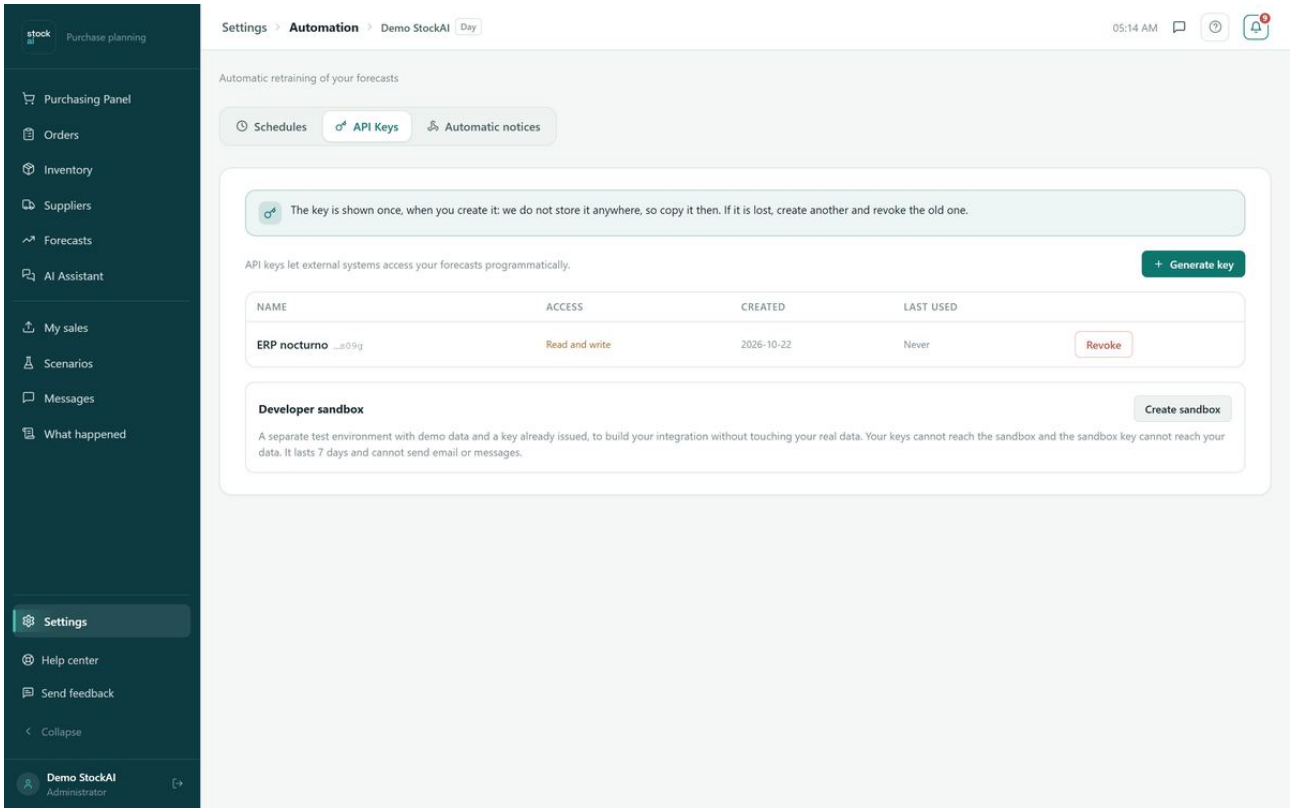
> If you have no finished forecast, the tab says "Upload your sales first" with a button to do it.

A failed recalculation does not leave you without numbers

Each scheduled run trains a new update from the one you picked, which is never touched. Only once the new one finishes successfully does it become what the Purchasing panel, the stock signal and the alerts read. If it fails, you keep seeing the previous numbers, and the error shows under "Already scheduled" and "Recent scheduled runs".

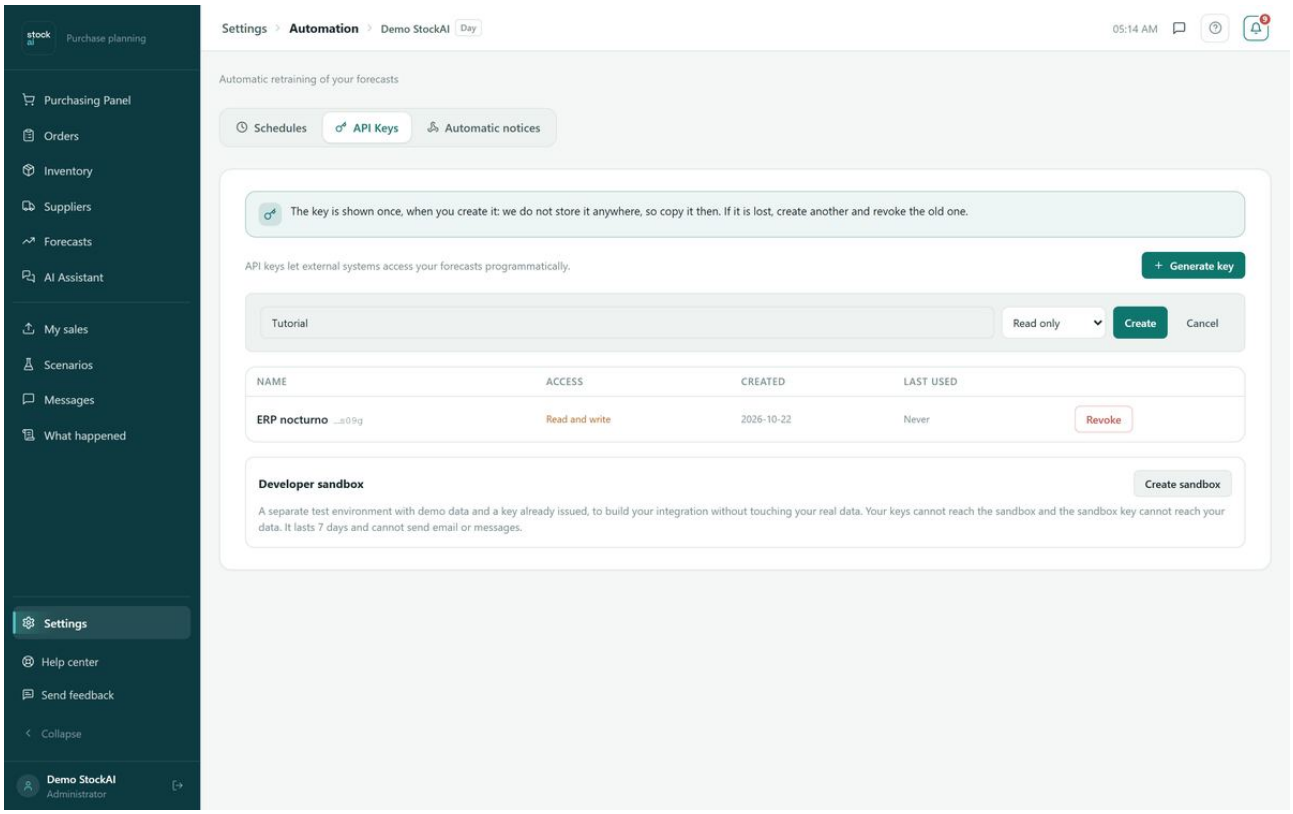
So it does not fill up your room, a schedule takes at most two saved forecasts: the one being read and the one training to replace it. Updates you created yourself are never deleted.

API KEYS

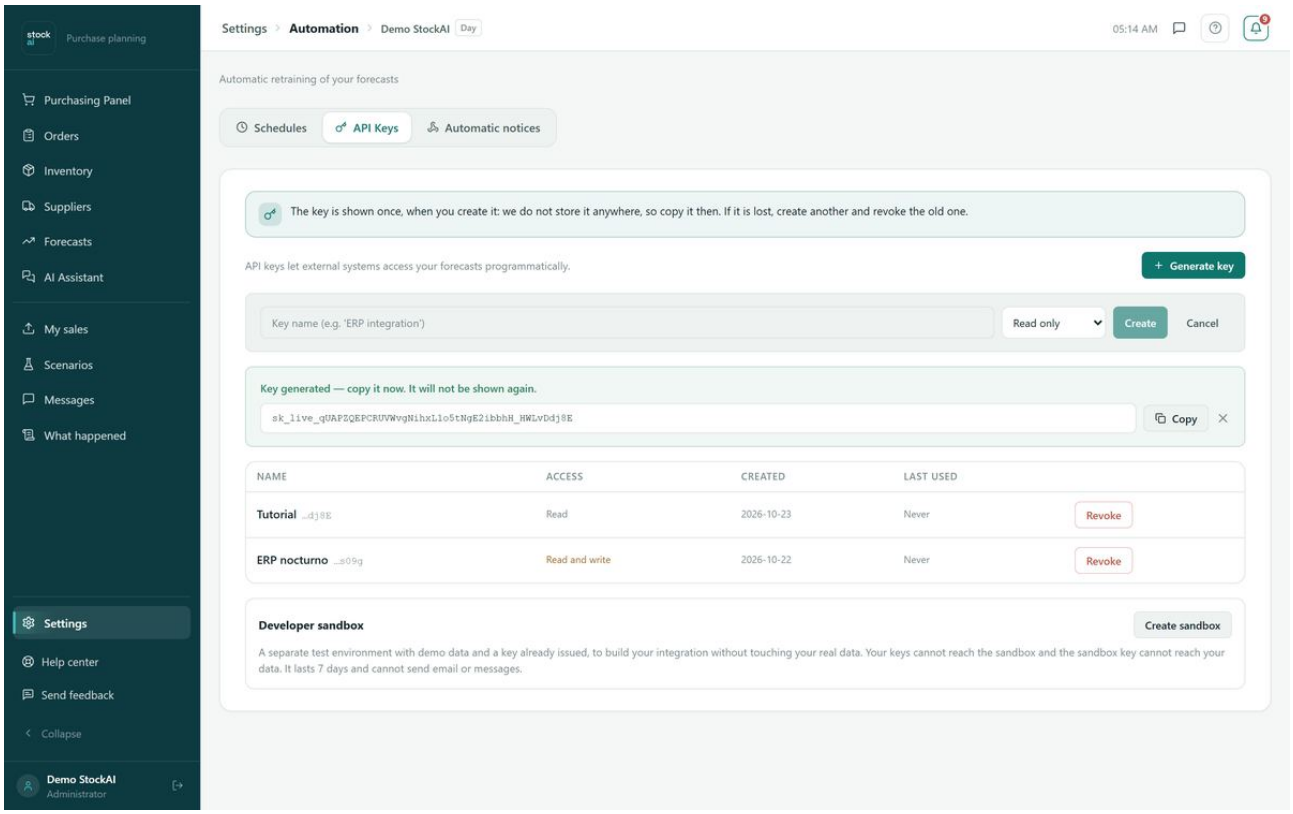


`sk_live_…` keys let another system (your ERP, a nightly script) use the API on your account's behalf. The table shows Name (with the last 4 characters), Access (Read or Read and write), Created, Last used and the Revoke button.

Create a key

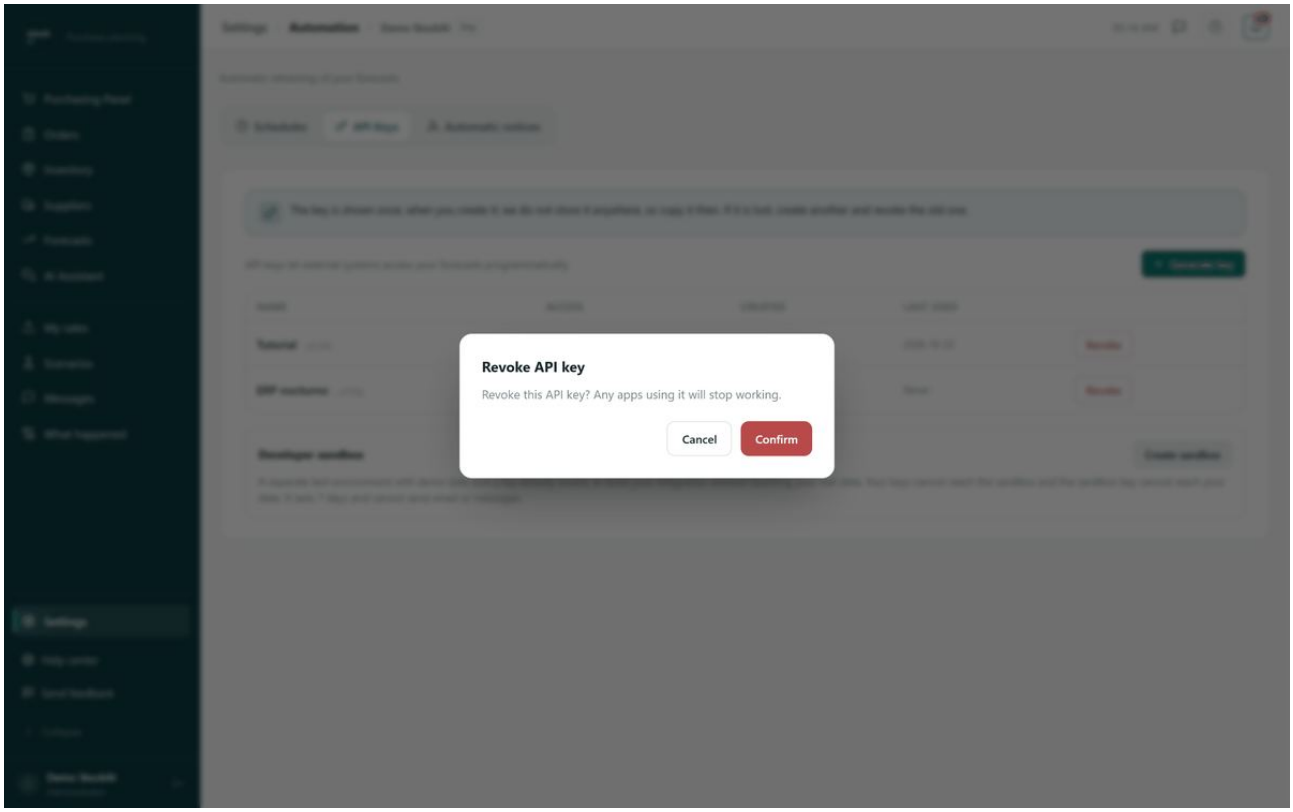


1. Press "Generate key".
2. Type a name that says what it is for ("ERP integration").
3. Choose What the key can do: Read only (acts as a read-only user: reads the stock signals) or Read and write (acts as an analyst: can push the nightly file and record orders). The default is Read only.
4. Press "Create".
5. Copy the key from the green box with "Copy". It is shown once: StockAI does not store it, so if you lose it you create another and revoke the old one.



This key was revoked right after the capture.

Revoke a key



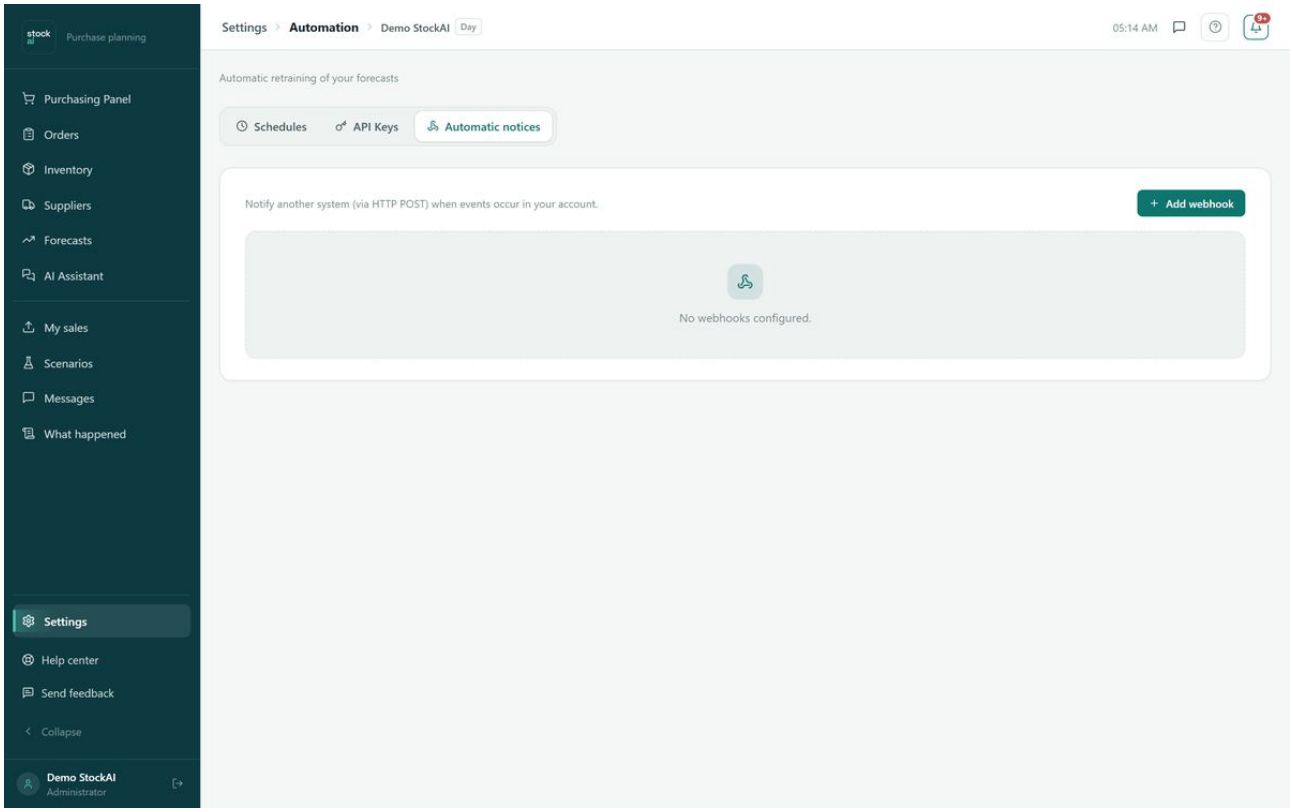
Press "Revoke" on its row and confirm. Apps using it stop working at once (they get 401). It cannot be undone: create another if you need one.

> Each plan allows a limited number of active keys (3 on Pro, 10 on Max) (see Usage and limits). A revoked key stops counting.

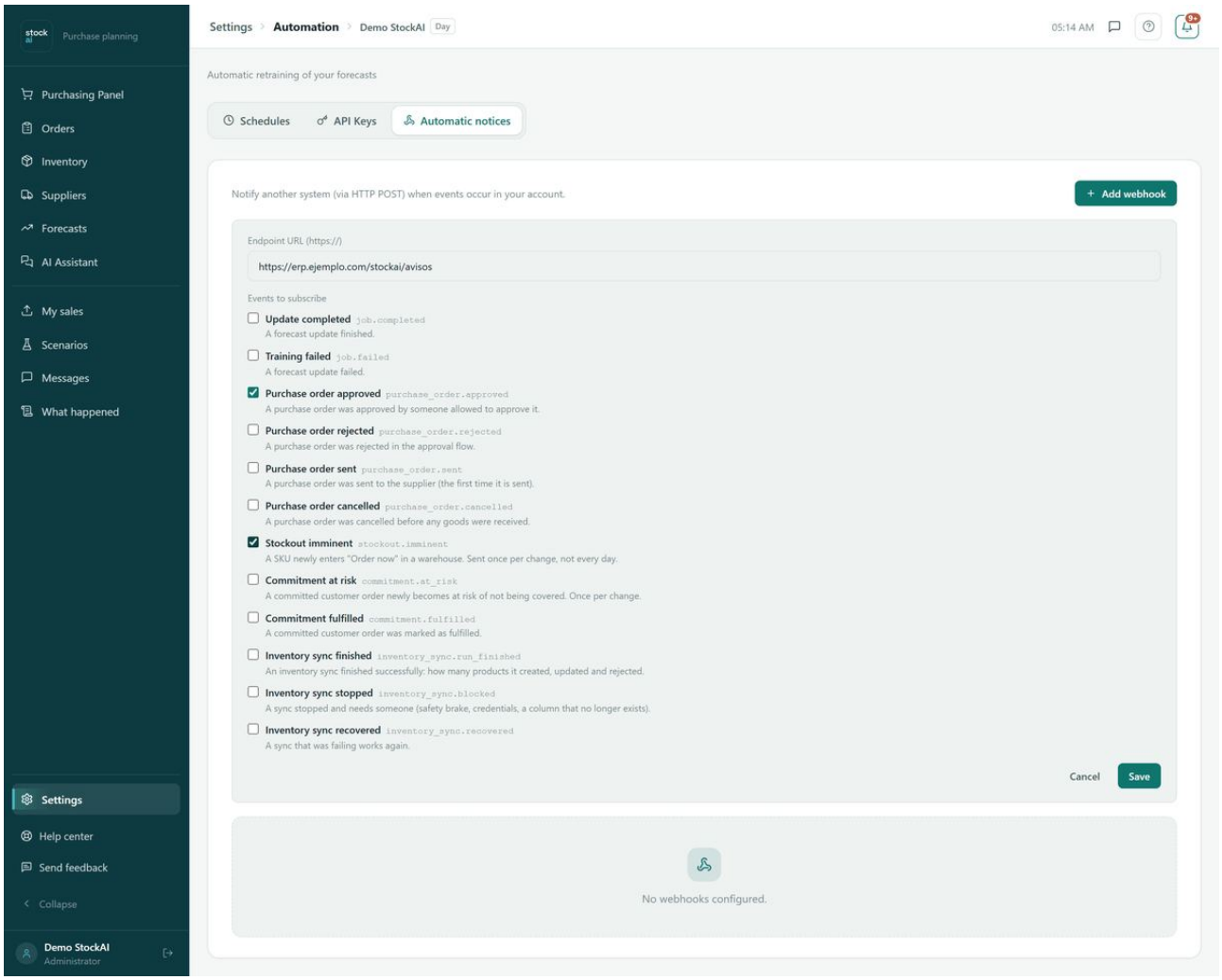
Developer sandbox

Under the table, "Create sandbox" (administrators only) creates a separate test environment with demo data and a key already issued, to build your integration without touching your real data. It shows the sandbox key once, plus a login to see in the app what your calls did. It lasts 7 days, cannot send email or messages, and your keys cannot reach it (nor its key your data). "Delete" erases it with its data.

AUTOMATIC NOTICES (WEBHOOKS)



Notifies another system, with an HTTP POST, when something happens in your account.



Form filled and cancelled: no webhook was created.

1. Press "Add webhook".
2. Type the Endpoint URL. It must start with `https://`.
3. Tick the Events to subscribe (each comes with its description).
4. Press "Save".
5. Copy the Webhook signing secret: it is shown only once. Your system uses it to check that each notice comes from StockAI (`X-StockAI-Signature` header).

Purchase orders	`purchase_order.approved`, `.rejected`, `.sent` (the first time it is sent) and `.cancelled`.
Imminent stockout	`stockout.imminent`: a product enters "Order now" in a warehouse. Once per change, not every day.
Commitments	`commitment.at_risk` (a committed order becomes at risk) and `commitment.fulfilled`.
Forecasts	`job.completed` and `job.failed`.
Inventory sync	`inventory_sync.run_finished`, `.blocked` (needs someone) and `.recovered`.

In the table each webhook shows its State (Active, Disabled after failures, and Its warehouses only if someone with limited warehouses created it) and these buttons:

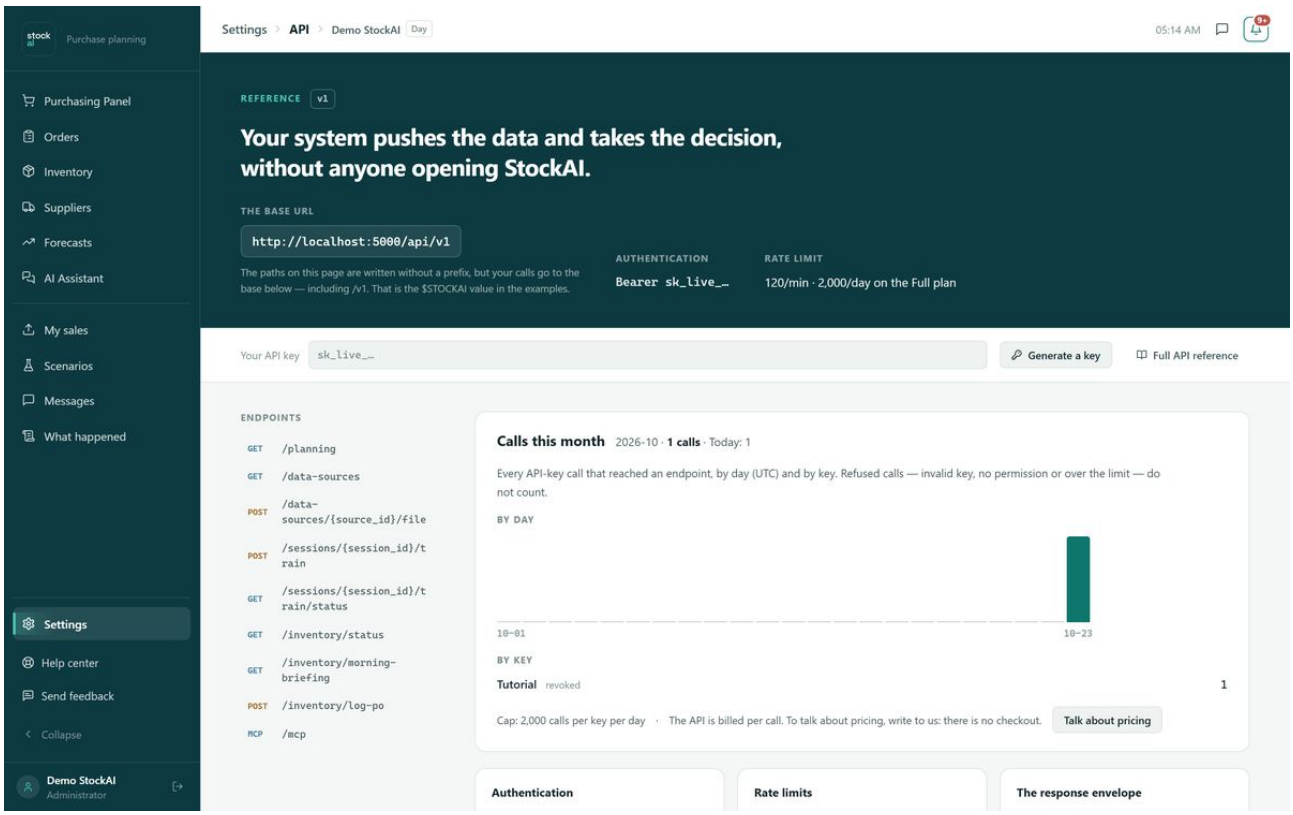
Deliveries	The delivery log: time, event, status (Pending, Delivered, Failed or Dropped), attempts, HTTP code and next attempt. Failed deliveries are retried.
Send test	Sends a test notice and opens the log so you see whether it arrived.
Rotate secret	Creates a new signing secret; the old one stops working immediately.
Re-enable	Only when it was disabled after failures.
Delete	Removes it at once, with a few seconds to Undo.

The API screen: reference and console

A reference of the most common API calls with a console to try them with your key, the month's usage and how to connect an AI assistant over MCP.

Open API from Settings → Automation and API → API. The row shows once the account has a key; the address always works. Administrators and analysts can use it (an analyst is exactly who wires the company's system up): the console only acts with the key you paste, never with your session. The API, MCP and WhatsApp alerts come with the Pro, Max and Corporate plans.

For a complete step-by-step integration guide, read The API step by step.

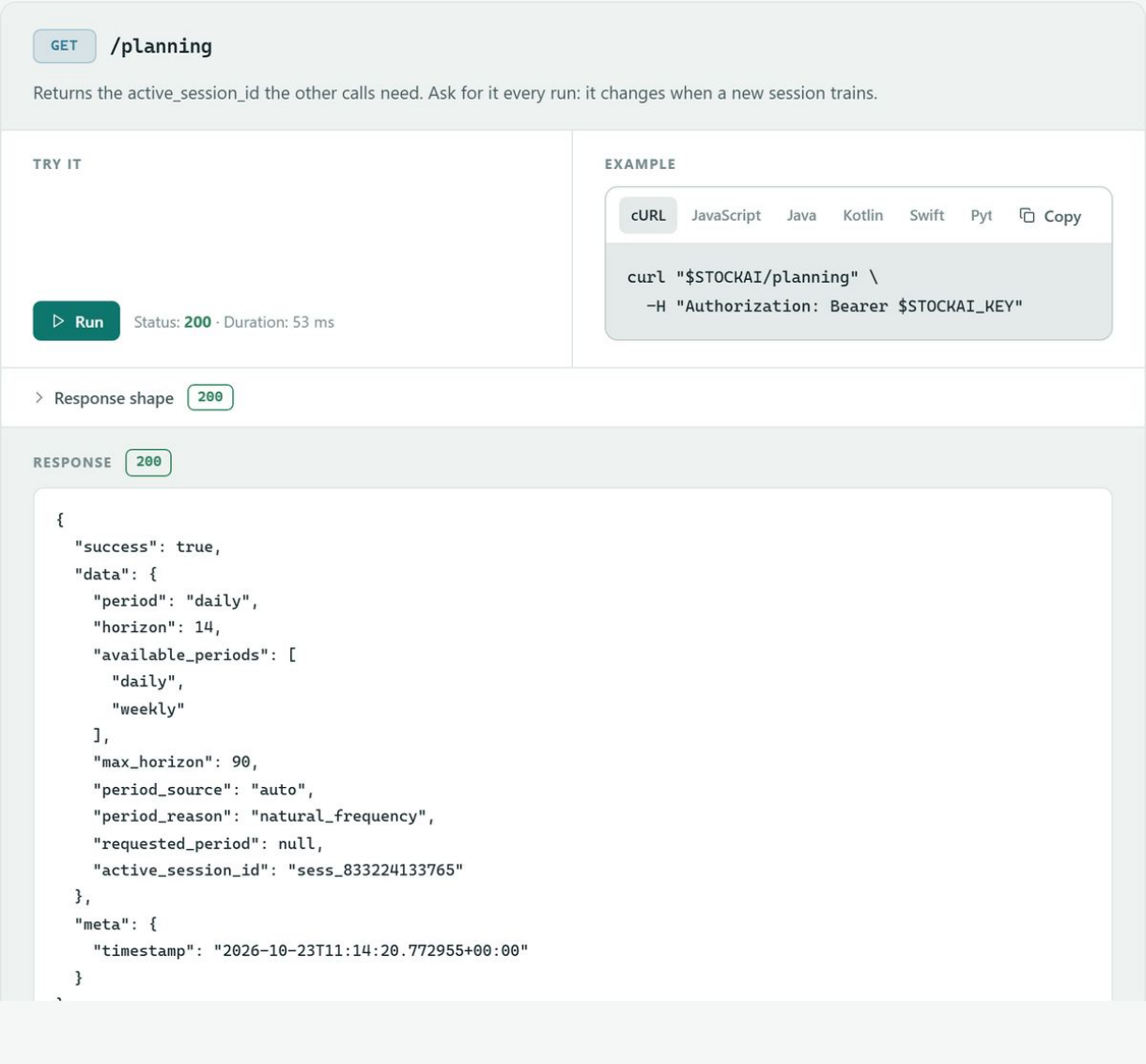


THE HEADER

The base URL	Where your calls go, including `/v1`. Paths on the page are written without a prefix; in the examples this base is `$STOCKAI`.
Authentication	`Bearer sk_live_…`: every call carries your key in the `Authorization` header. Writing needs a read-and-write key.
Rate limit	120 calls per minute per key on any plan with the API; each key also has a daily ceiling: 2,000 on Pro and 20,000 on Max (corporate has none). Going over returns 429 with `Retry-After`.
Your API key	A bar that follows you down the page. Paste your key here: it stays only in the page (not stored in the browser) and is gone when you leave.
Generate a key	Takes you to Automation → API Keys.
Full API reference	The developer documentation with every call, generated from the service itself.

On the left, Endpoints lists the console's calls; press one to jump to it. Below are the general rules: Authentication, Limits and The envelope (every response is wrapped and yours is in `data`; almost every error carries `error_code`: branch on the code, not the text).

TRY A CALL



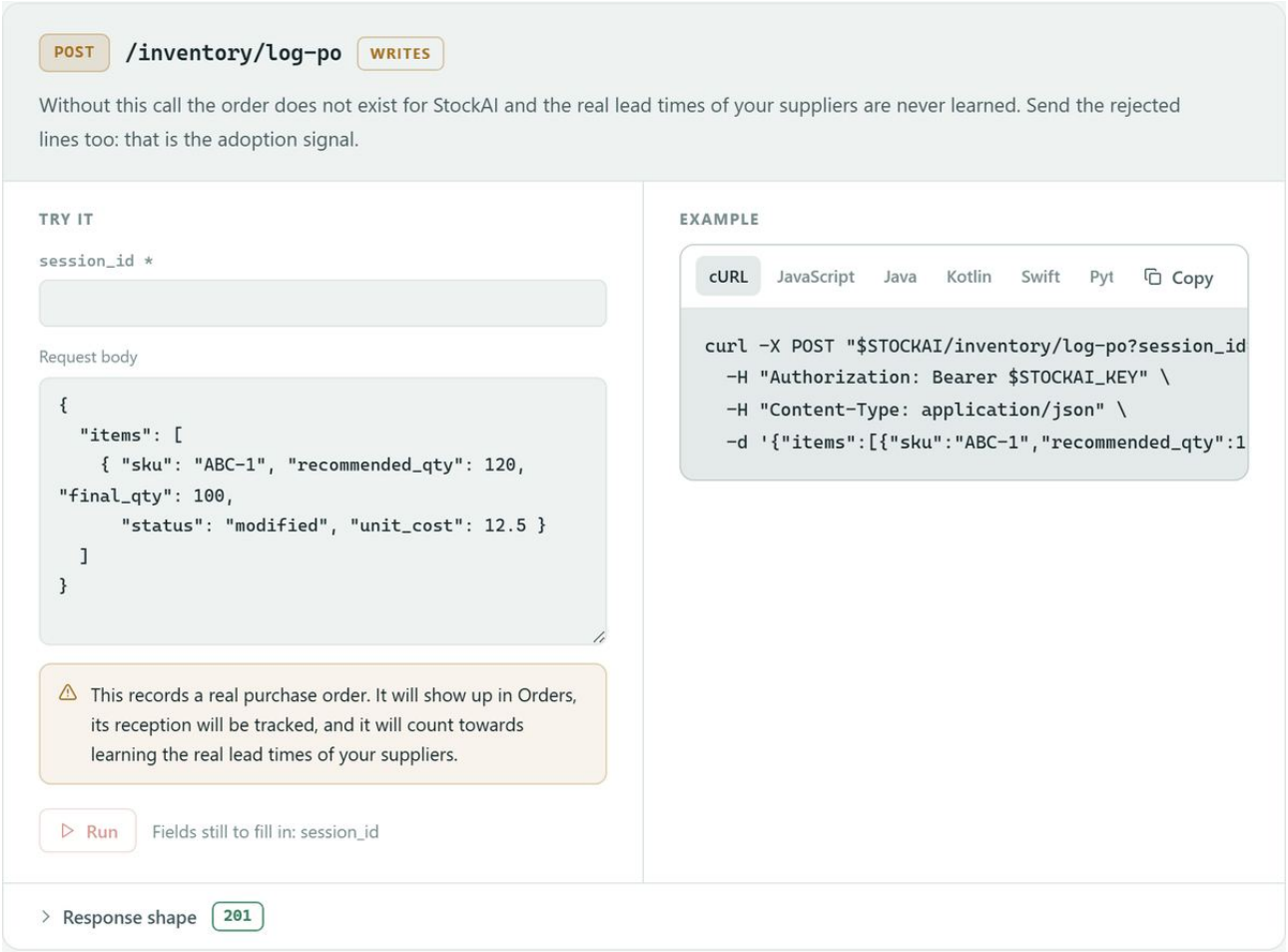
1. Create a key in Automation and paste it into Your API key.
2. Scroll to the call, for example `GET /planning` (returns the `active_session_id` the others use).
3. Fill in the Try it fields if it has any (`session_id`, filters, a file or the request body). Required ones carry an asterisk; if one is missing the card says which.
4. Press "Run". You will see the HTTP Status, the Duration and the full Response.

Example	The same call in cURL, JavaScript, Java, Kotlin, Swift, Python, C#, Go and Rust, with a Copy button.
Response shape	Unfolds the schema of what the call returns, field by field.

The console's calls are: `GET /planning`, `GET /data-sources`, `POST /data-sources/{source_id}/file`, `POST /sessions/{session_id}/train`, `GET`

`/sessions/{session_id}/train/status`, `GET /inventory/status`, `GET /inventory/morning-briefing` and `POST /inventory/log-po`.

The calls that write



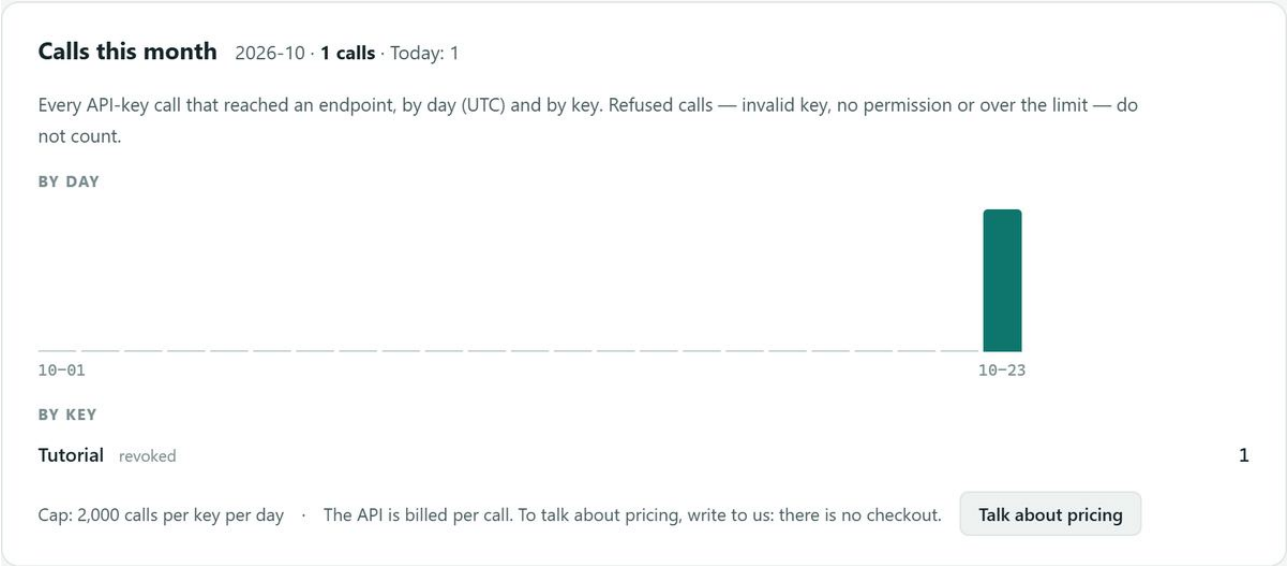
Those marked Writes change your real data; there is no test environment (that is what the sandbox is for). Each explains its consequence before running and asks you to confirm ("This really changes your data"):

· `POST /data-sources/{source_id}/file` replaces that source's file; the next forecast is calculated with it.

· `POST /sessions/{session_id}/train` queues a real training: it takes one of your parallel jobs and changes the stock signals when it finishes.

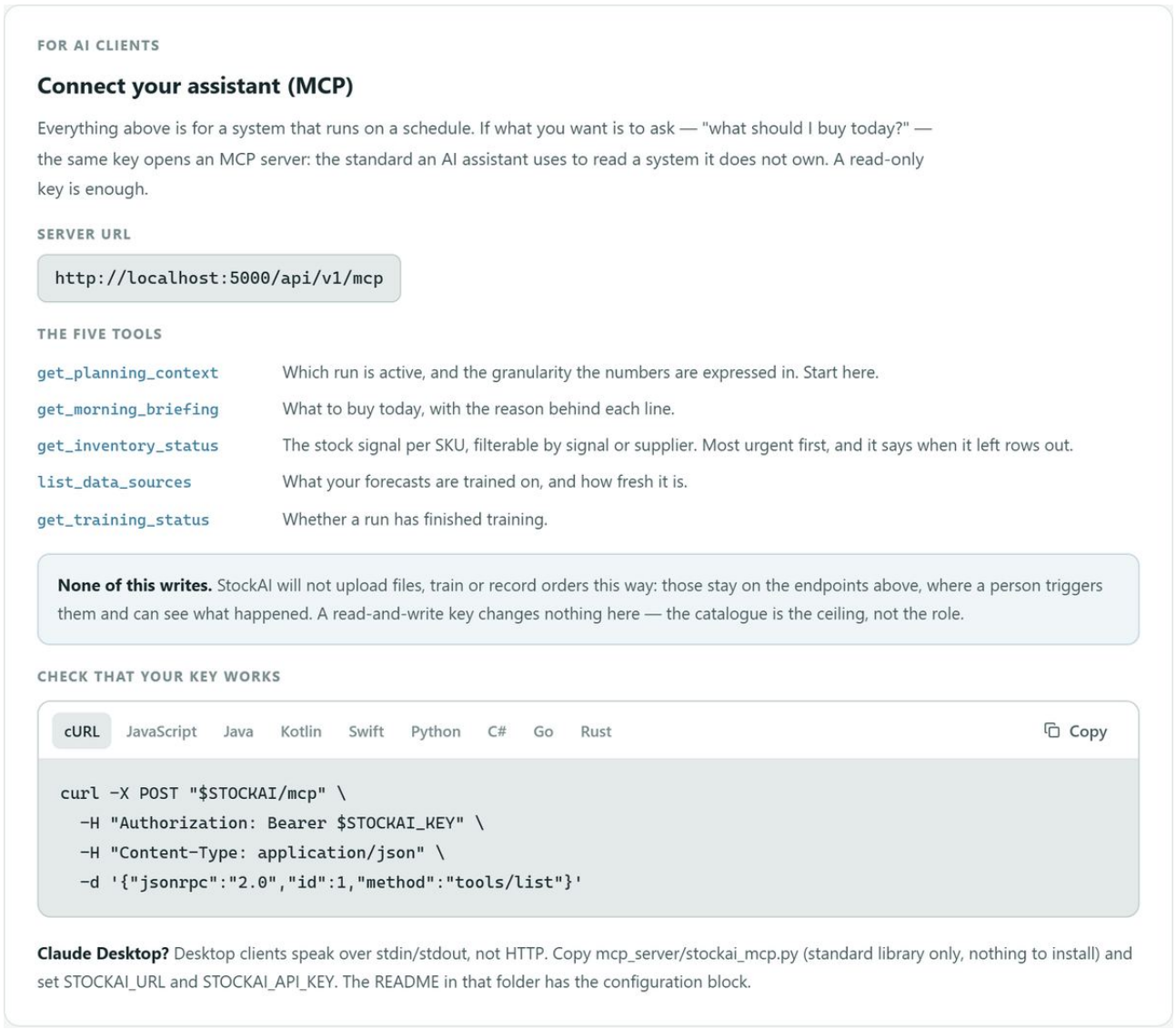
· `POST /inventory/log-po` records a real purchase order: it shows in Orders and counts towards learning your suppliers' lead times. Careful: with an empty body or no `items` list it records an order with every Order now and Order soon product of that session.

CALLS THIS MONTH



Administrators only (an analyst reads that only an administrator sees it). It counts every call with a key that reached an endpoint, per day (UTC) and per key; rejected calls (invalid key, no permission or over the limit) do not count. It shows the month's total, today's, one bar per day, usage by key (with its access, or "revoked") and the daily cap. "Talk about pricing" opens the dialog to write to us.

CONNECT YOUR ASSISTANT (MCP)



The same key opens an MCP server so an AI assistant can ask "what do I buy today?". A read-only key is enough.

Server URL	The base followed by `/mcp`.
The five tools	`get_planning_context` (start here), `get_morning_briefing`, `get_inventory_status`, `list_data_sources` and `get_training_status`.
None of this writes	Over MCP nothing is uploaded, trained or recorded, even with a read-and-write key.
Check that your key works	A ready-to-copy `tools/list` call.
Claude Desktop?	Desktop clients talk over stdin/stdout: copy `mcp_server/stockai_mcp.py` and set `STOCKAI_URL` and `STOCKAI_API_KEY`.

Installation: services on and off

Which services this StockAI installation has, which are on, what is lost with the ones that are not, and your company's own channels.

Open Installation from Settings → Installation. It has two tabs that answer to two different people:

This installation	Belongs to whoever runs the server: the email, WhatsApp, AI, payment credentials and so on. It is not opened by a company's administrator role but by the addresses the server names in `INSTANCE_ADMIN_EMAILS`. (If the server has a single company and nobody is named, its administrator operates the installation while it stays the only one; the screen warns about it.)
My channels	Belongs to your company: its own email sender and its own WhatsApp number. Any administrator of the company sets it up.

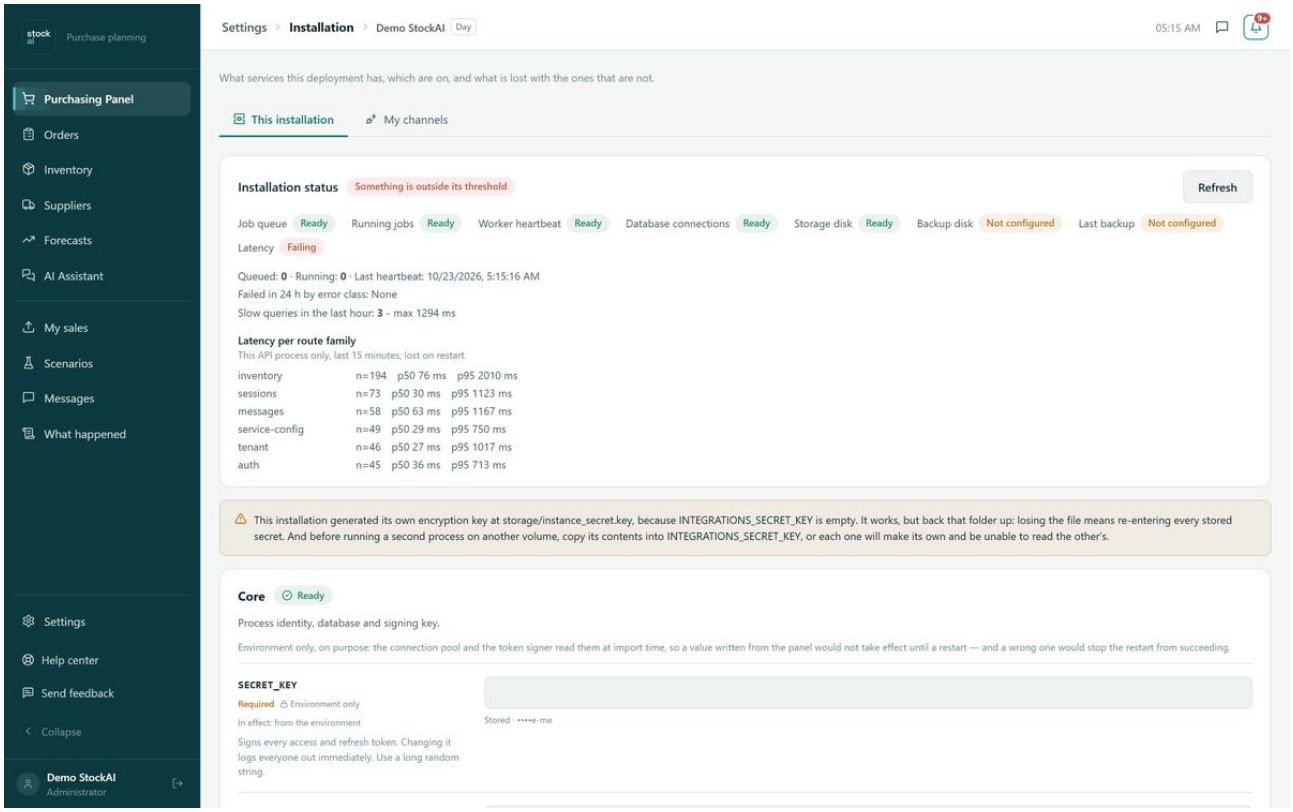
WHAT EACH READER SEES

· Analyst or read only: the row is not in Settings, and the address shows "This account does not operate the installation".

· Administrator who does not operate the installation: lands straight on My channels, with a line explaining why; the This installation tab shows "This account does not operate the installation". If the server names nobody, you will see "This installation has no operator".

· Installation operator: both tabs, editable. The demo account in these captures is an operator.

INSTALLATION STATUS

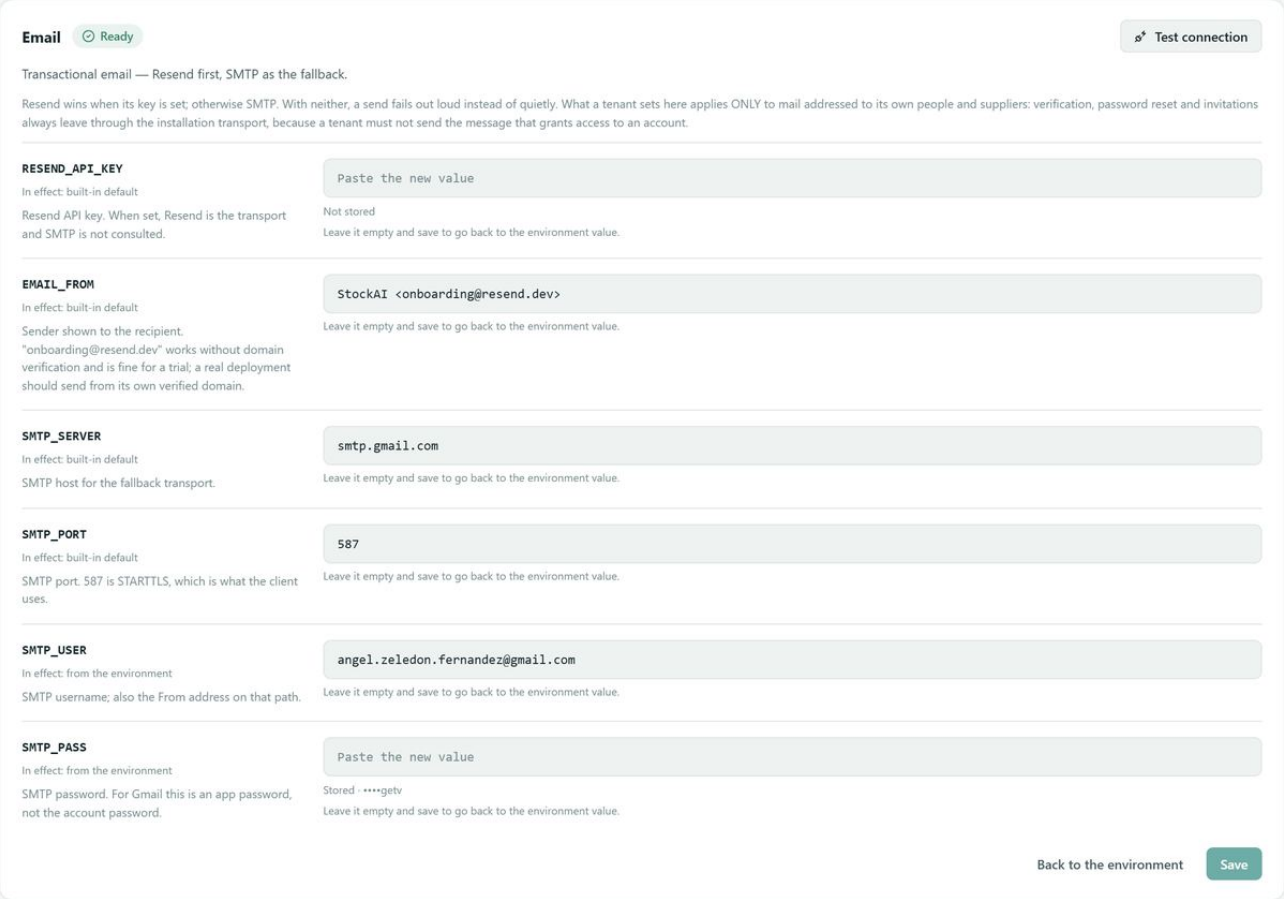


At the top, a health summary with "Refresh": job queue, jobs running, worker heartbeat, database connections, storage disk, backup disk, last backup and latency, each Ready, Not configured or

Failing. If one is out of its threshold, the title says so. Below: queued and running jobs, failures in the last 24 hours, slow queries and latency per route family (this process, last 15 minutes).

Notices may appear: the encryption key the installation generated itself (back that folder up), that no secret can be stored, that stored configuration could not be read, operator access "because yours is the only company" or undocumented settings.

A SERVICE CARD

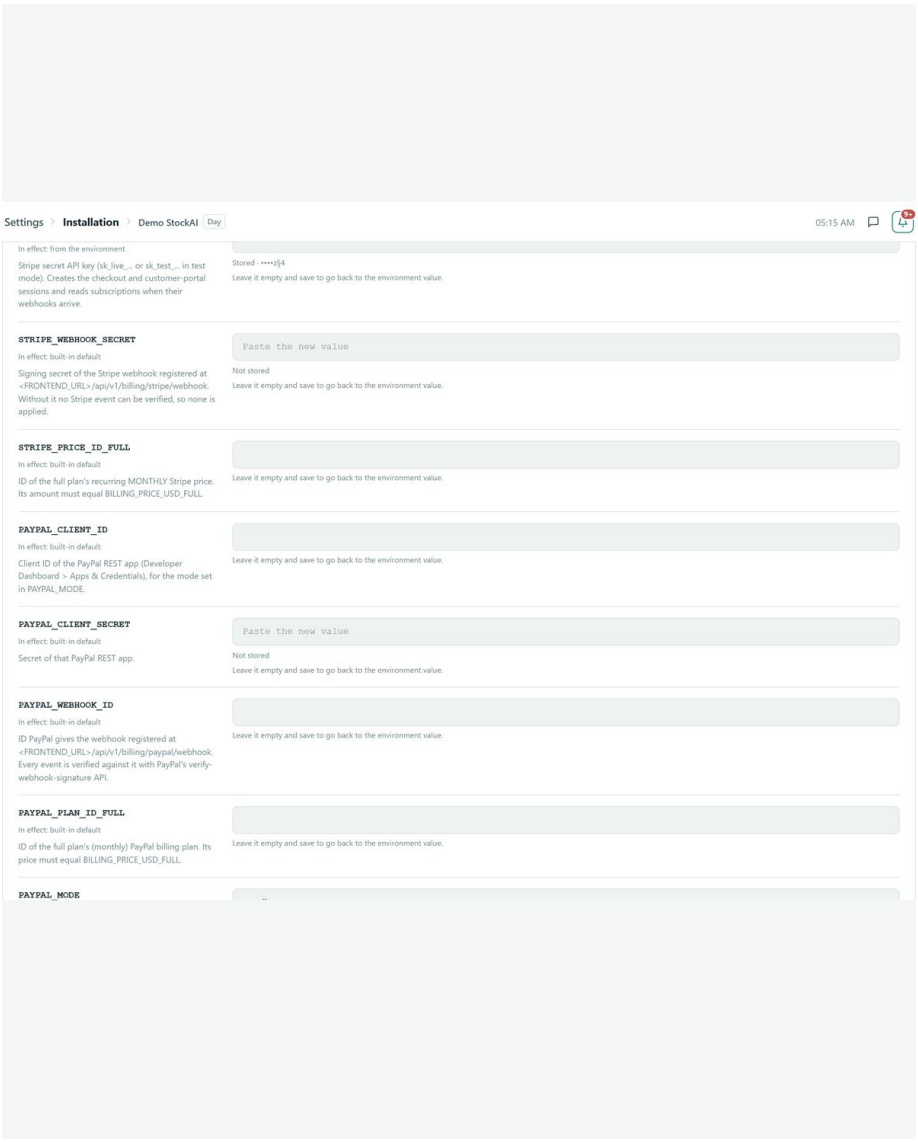


Each service (Core, Assistant, Email, WhatsApp, SMS, Document search, Secret encryption, Commercial contact, Online payment, sign-in with Google/Microsoft/Apple, Sales by e-mail, company sign-in, Worker, Size ceilings, Customer databases, Each company's own AI, Public-API-only mode, Operations) has:

State	Ready, On, Not configured, Off or Failing (configured but failing: for example a key revoked at the provider).
Test connection	Checks the credential against the provider and gives the result: answers correctly, rejected the credential, could not be reached, did not answer in time…
Each variable	Its name, whether it is Required, whether it is Environment only (changed in the `.env` file and needs a restart; the panel shows it but never writes it), and In effect: where the value that rules comes from (this panel, the environment, your company or the built-in default).
Secrets	Never shown: the field is empty and below it reads "Stored · ••••abcd" or "Not stored". Typing replaces; leaving it empty and saving goes back to the environment value.

Save / Back to the environment	Save applies without a restart. Back to the environment deletes what the panel stored for that service (asks to confirm).

A service that is off



A service without its credential is not an error: it is off and says so. The yellow box explains what is lost while it stays that way, and Missing: names the variables (with "or else" when there are two paths, such as Stripe or PayPal).

WHERE EACH VALUE COMES FROM

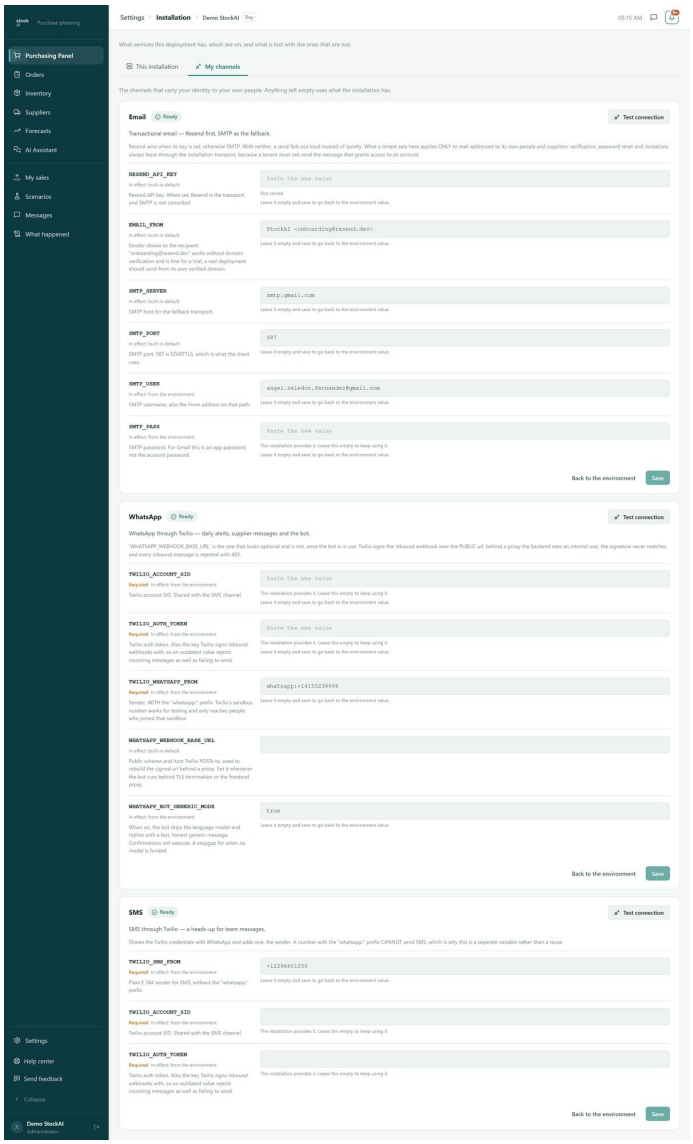
Every field says which value is "In effect": from your company, from this panel, from the environment (the server's .env file) or the built-in default. What the panel saves beats the file and takes effect without a restart.

· "Environment only" fields are shown but not editable: the server reads them at startup.

· A saved key is never shown again; at most you see its last four characters, so you can tell which one you pasted.

· "Back to the environment" removes what the panel saved for that service and hands control back to the server file.

MY CHANNELS



The channels that carry your company's identity to your own people and suppliers: your email sender and your WhatsApp or SMS number. Anything left empty uses what the installation has ("The installation provides it. Leave this empty to keep using it."). Email verification, password resets and invitations always go out through the installation's email.

> Before you save
>
> What you save here changes how real emails and messages go out. Use "Test connection" after saving and, if something stops working, "Back to the environment".

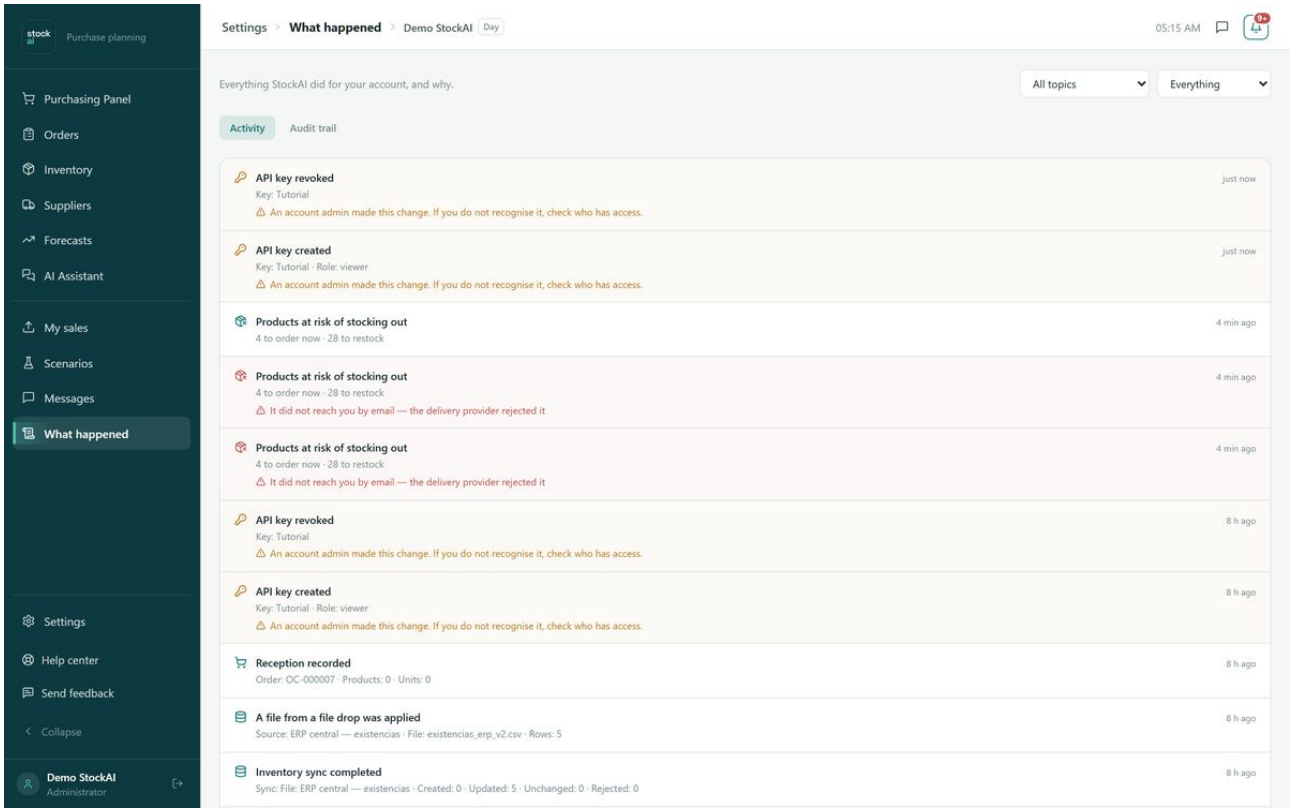
EXAMPLE: TURN THE ASSISTANT ON

1. Under "This installation", find the "Assistant (DeepSeek)" card.
2. If it says "Not configured", the card names the missing variable: `DEEPSEEK_API_KEY`.
3. Paste the key and press "Save".
4. Press "Test connection": it should say "Answers correctly."
5. Open the assistant: the "unavailable" notice is gone.

What happened: activity and audit trail

Everything StockAI did for your account, and why; and, for administrators, the audit trail of who changed what.

Open What happened from the sidebar, from Settings → Activity or from "see all" in the bell. The bell only carries what needs a decision; here is the full history, informational notices included. Every role can read it.



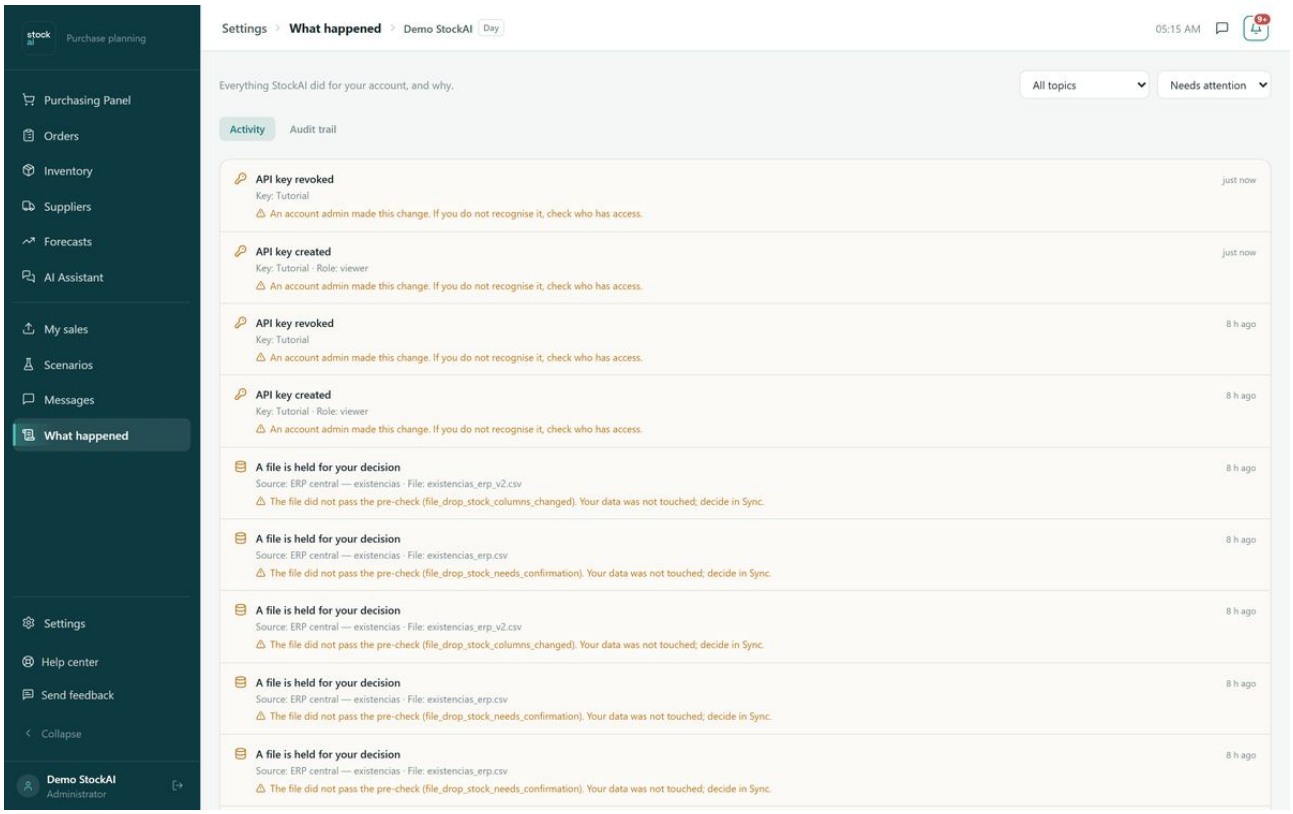
WHAT GETS RECORDED

Trainings finished and failed; purchase orders created, sent and not sent (with the reason, for example a supplier with no email or WhatsApp); stock imported; shrinkage; transfers; plan ceilings reached; users, roles and API keys; and the notices StockAI sent you.

THE ACTIVITY TAB

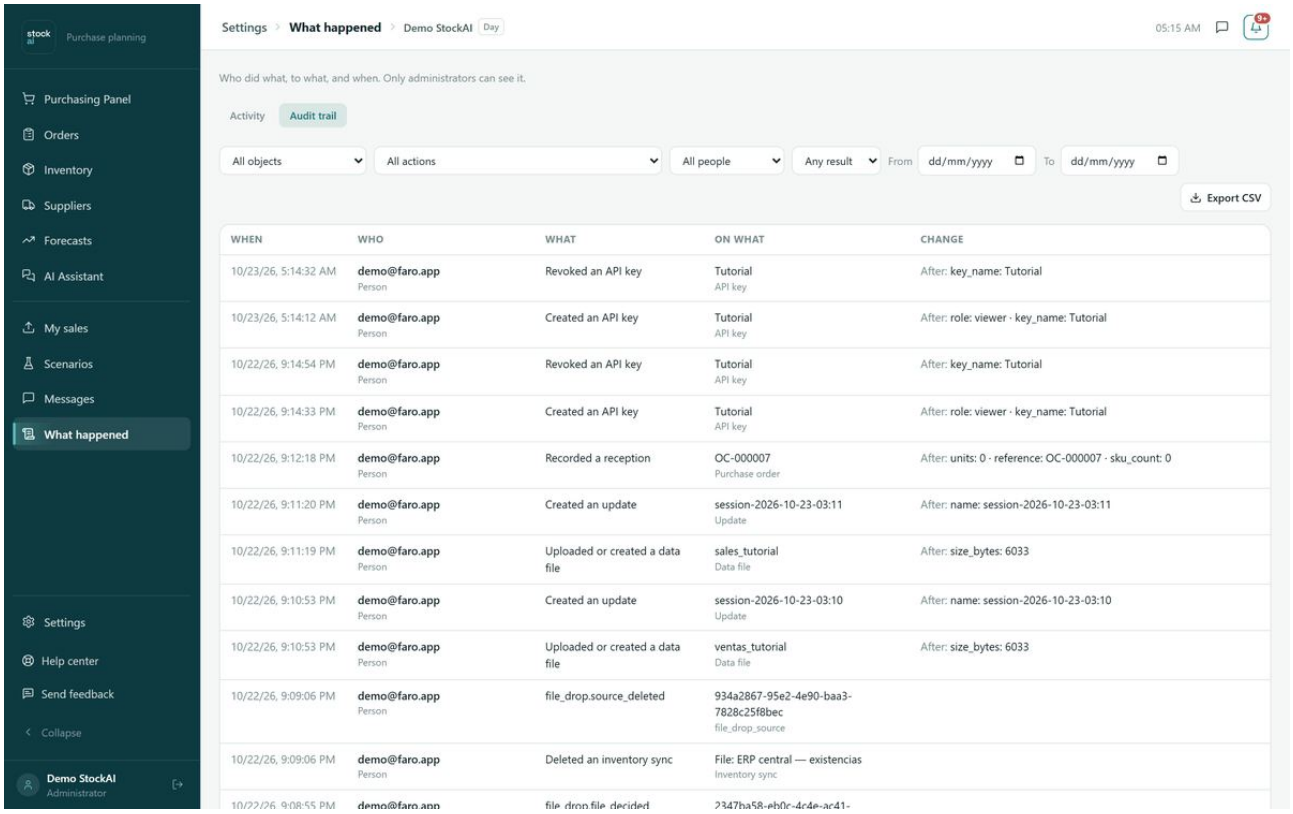
Each row is an event: what happened, how long ago, the key facts (source and file, order and value, key and role…) and, when it applies, what to do (for example "decide in Sync"). At the bottom, "N of M" and "Show more" bring the next 50.

All topics	Filters by topic: account and access, plan and payment, data, stale data, plan ceilings, monthly summary, purchasing, stockout alert, supplier lead time, forecasts.
Everything	Filters by importance: Critical, Needs attention or For the record.



Changing a filter restarts the list. If nothing matches you will see "Nothing matches those filters"; if the account has recorded nothing yet, "Nothing recorded yet."

THE AUDIT TRAIL TAB (ADMINISTRATORS)



Only administrators see this tab, because it names people. It answers "who did what, to what, and when": people and integrations (API keys), with the previous and new value where the change has

one.

Filters	Object type, Action, Person, Result, From and To.
When / Who	Date and time, and who did it (a person or a key).
What / Object	The action and the object (an API key, a purchase order, a data file…).
Change	"Before" and "After" of the fields that changed.
Export CSV	Downloads what is filtered. Filtering, paging and export happen on the server, so it works with very long histories.

To stream the audit trail to your security system continuously, use the Continuous audit export card in Settings.

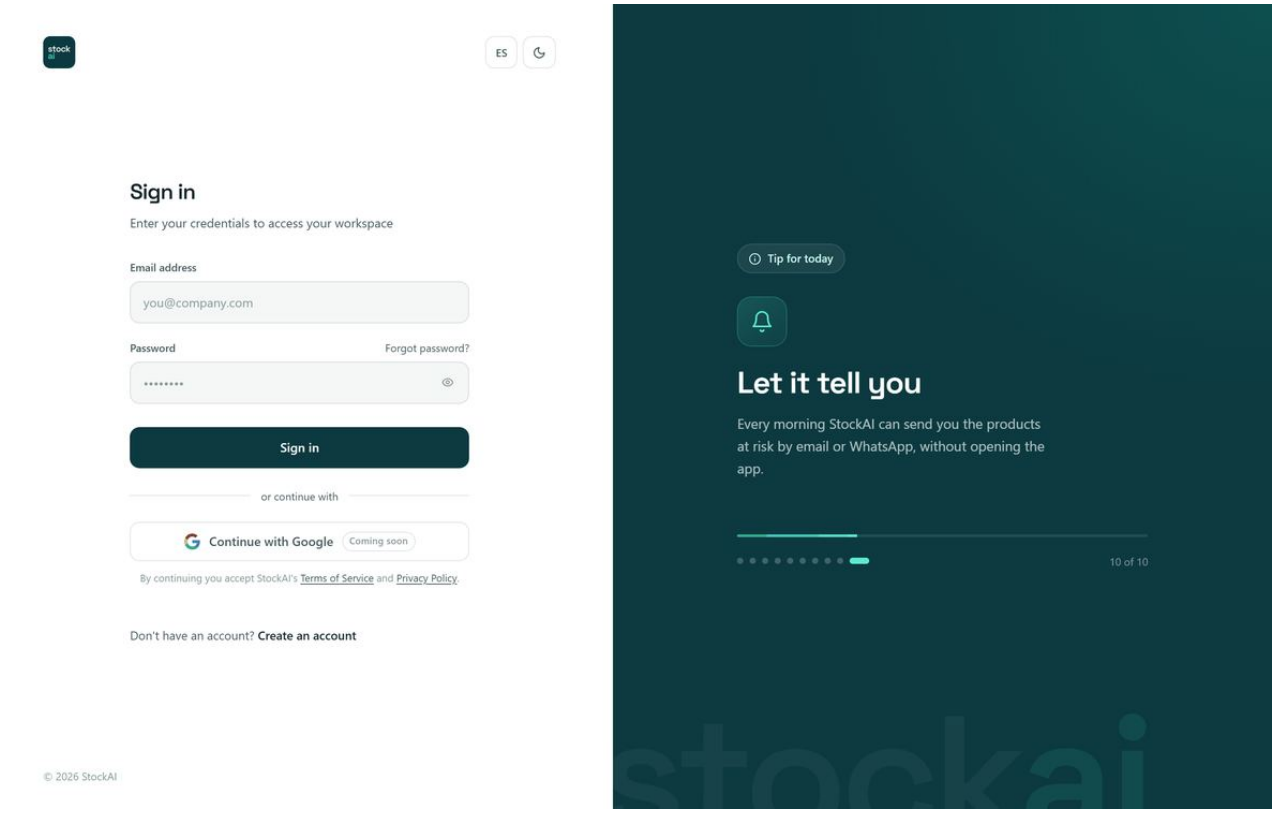
Access and portals

Signing in, trying without signing up, recovering the password and the supplier, customer and approval portals.

Sign in

Signing in to StockAI with your email and password, the second code step when your account or your company requires it, signing in with your company account and what each notice means.

Sign in is everybody's door: admins, analysts and read-only users all come in here. Signing in takes you to the Purchasing Panel. If you open this screen with a session still active, it takes you straight in without asking anything.



The sign-in screen.

WHAT IS ON THE SCREEN

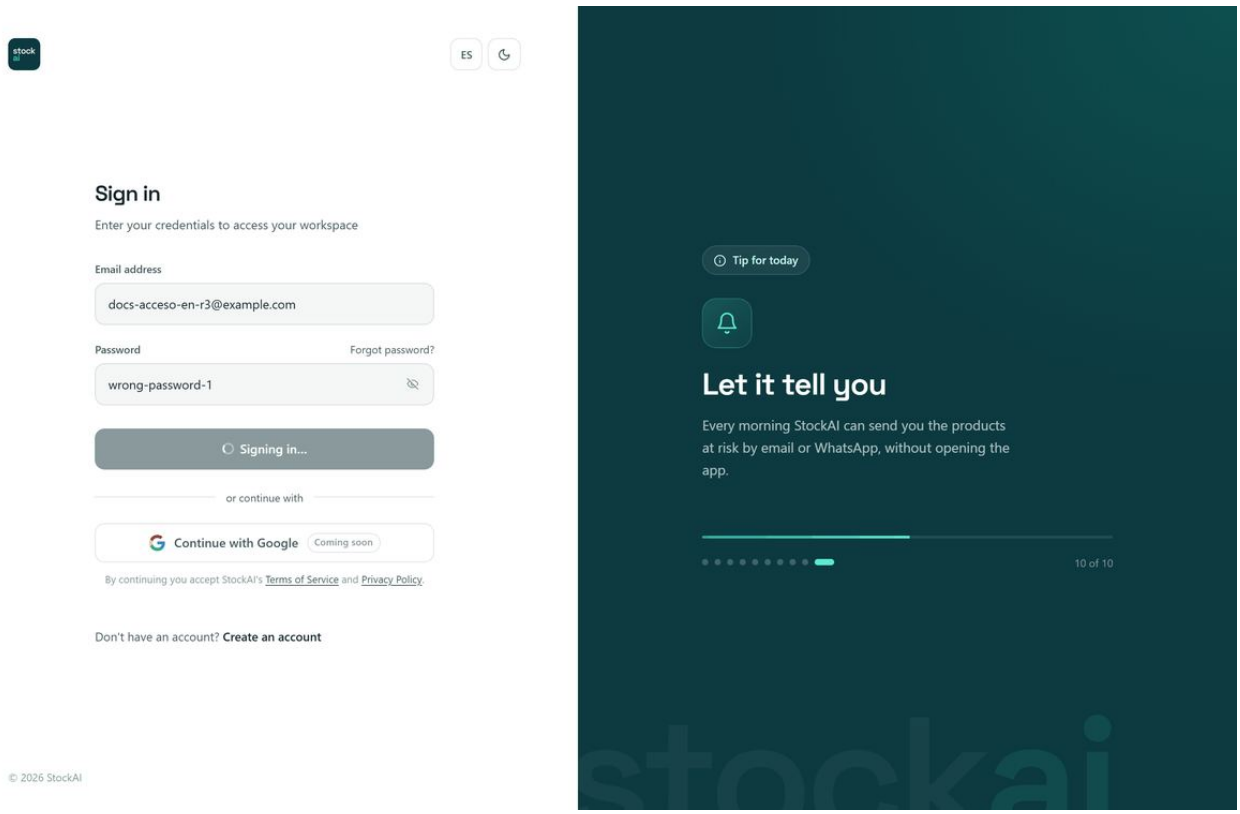
Email address	The email you signed up or were invited with.
Password	Your password. The eye shows or hides it.
Forgot password?	Opens Recover your password.
Sign in	Signs you in. While it checks it shows «Signing in…».

or continue with · Continue with Google	A switched-off button tagged «Coming soon» until the installation enables Google sign-in. Social sign-in is off by default; when an installation enables it, the button goes to Google's page and comes back signed in. The first time you sign in that way your account is created, which is why the line below reads «By continuing you accept StockAI's Terms of Service and Privacy Policy».
Sign in with your company	Only shows if the installation enabled company sign-in (SSO). See below.
Don't have an account? Create an account	Opens Create your account.

SIGNING IN STEP BY STEP

1. Open Sign in.
2. Type your Email address and your Password.
3. Press «Sign in».
4. If your account has two-step verification, type the 6-digit code from your authenticator app and press «Verify».
5. Done: you land on the Purchasing Panel. The session renews itself while you use the app; you do not have to sign in again every few minutes.

THE NOTICES AND WHAT TO DO



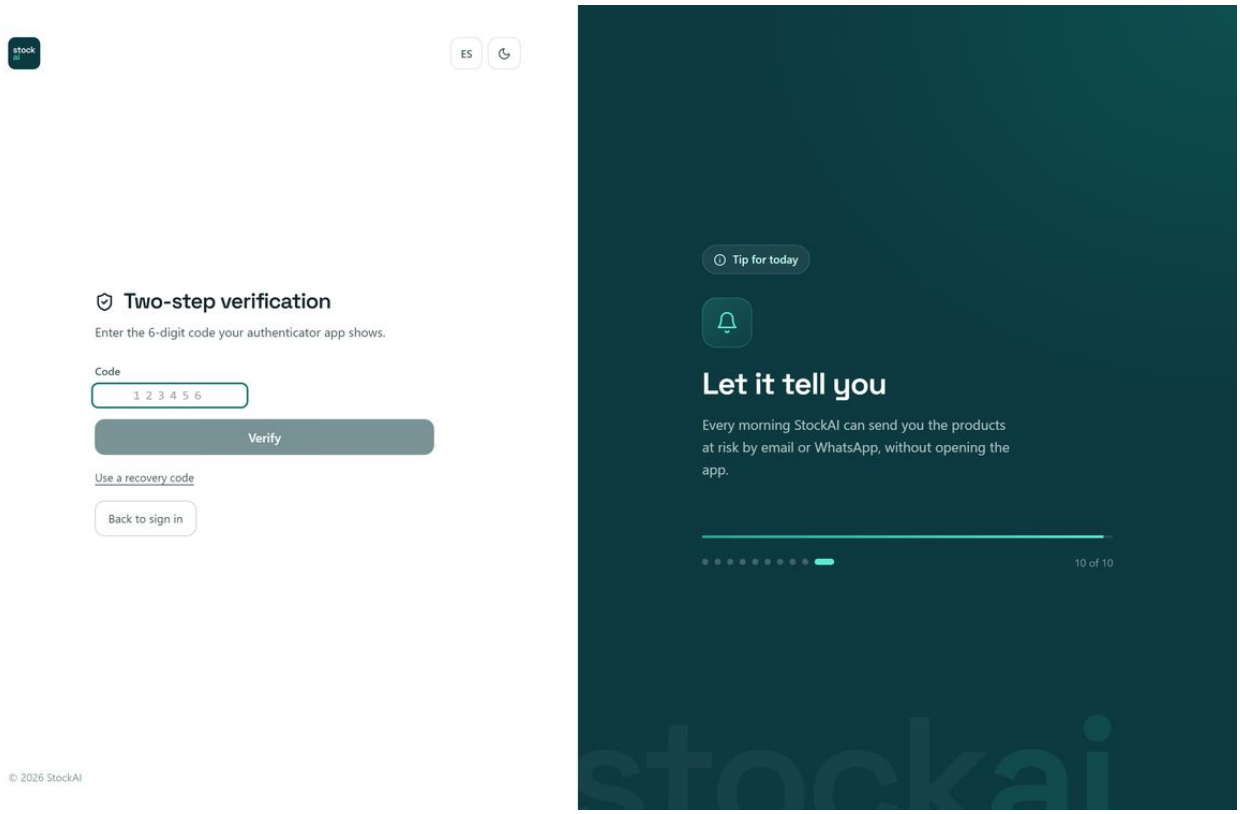
Wrong password: the notice is the same whether or not the email exists.

«Wrong email or password.»	The email does not exist or the password does not match. Both give the same notice on purpose, so nobody can find out which emails have an account.

«Too many attempts. Wait a few minutes and try again.»	More than 5 attempts with the same email in 5 minutes.
«This account is locked after too many failed attempts…»	Your company set a lockout after several failed attempts. Wait the minutes it says or ask an admin to unlock you.
«Your account is pending verification…»	The email is not verified yet. The notice carries a «Resend email» button to ask for a new link.
«Your company requires signing in with its identity provider…»	Your company made company sign-in mandatory for your email domain. The «Sign in with your company» option opens by itself with your email filled in.
«This account only accepts connections from approved IP addresses…»	Your company limits which networks can sign in and your current connection is not on the list. The notice shows your address so you can pass it to your admin.
«Your password is older than your company allows…»	Your company requires changing the password every so often. Change it with «Forgot password?».
«This trial account has ended…»	It was a trial account and its 24 hours are over.
«Your account is not active (status: …)…»	An admin deactivated your user. Ask them to reactivate it.

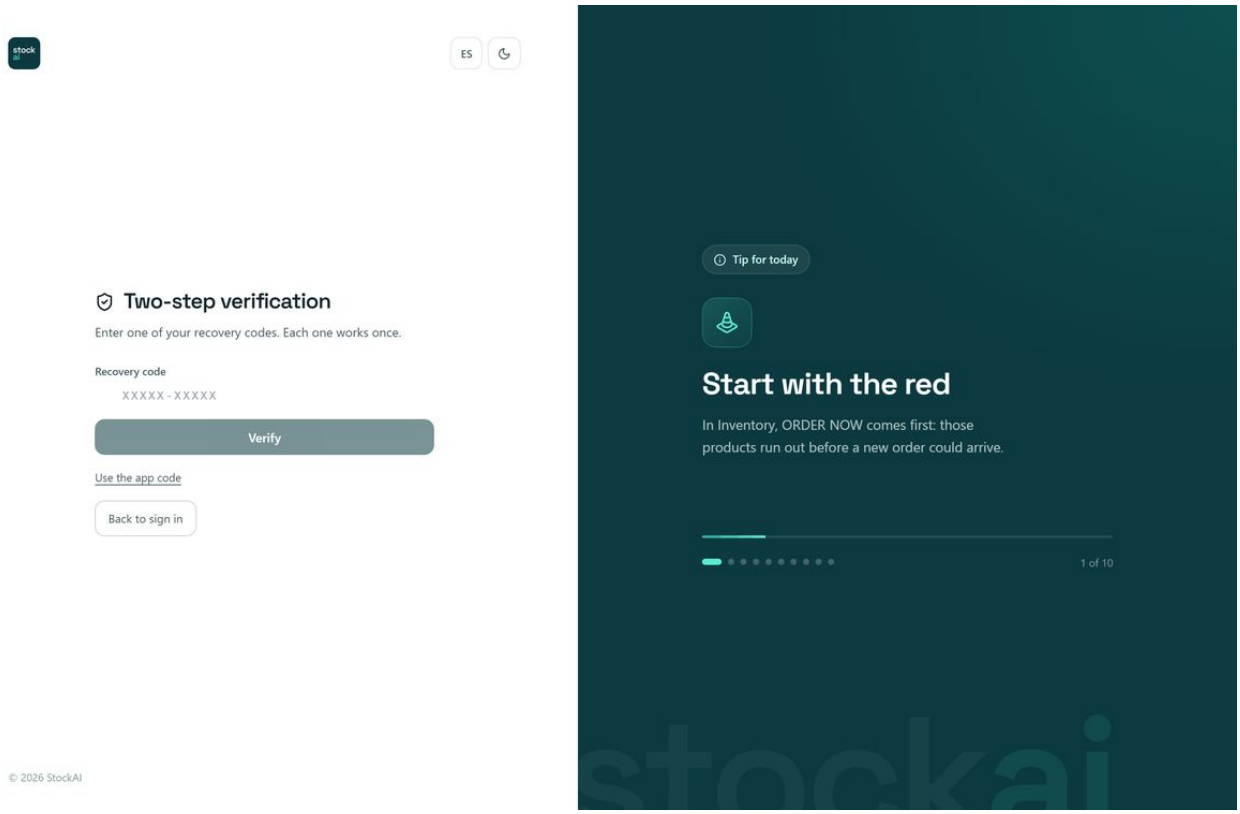
TWO-STEP VERIFICATION

If you turned on two-step verification in My account, after the password the screen switches to «Two-step verification». No session exists until you enter the code.



The second step: the 6-digit code from your authenticator app.

Code	The 6 digits your authenticator app shows right now. «Verify» turns on once all 6 are in.
Verify	Checks the code and opens the session.
Use a recovery code	Switches the field to «Recovery code»: one of the codes you saved when you turned the verification on. Each one works once. «Use the app code» goes back to the normal code.
Back to sign in	Returns to the email and password form (the password is cleared).



Phone not at hand: sign in with a recovery code.

> Each step has few attempts
>
> Each code step allows 5 attempts; a code already used does not work again. If the step expires or runs out of attempts you see «This step expired or was already used. Sign in again.» and must type your password again. Signing in with a recovery code is recorded in your account activity.

If your company requires two-step verification and you have not set it up yet, instead of the code you see «Your organization requires two-step verification»: set it up right there: scan the QR code with your authenticator app (or type the key by hand), enter the code the app shows and press «Turn on», then save the recovery codes that appear («Save your recovery codes»). When you finish, press «Sign in again» to sign in with the code.

SIGN IN WITH YOUR COMPANY (SSO)

If the installation enabled company sign-in, a «Sign in with your company» button appears. On an installation where it is not enabled the button is simply not there (as in the captures).

1. Press «Sign in with your company».
2. Type «Your work email».
3. Press «Continue». StockAI looks up your domain's identity provider and sends you to its page («Opening your company sign-in…»).
4. Sign in there with your company account; you come back to StockAI signed in.

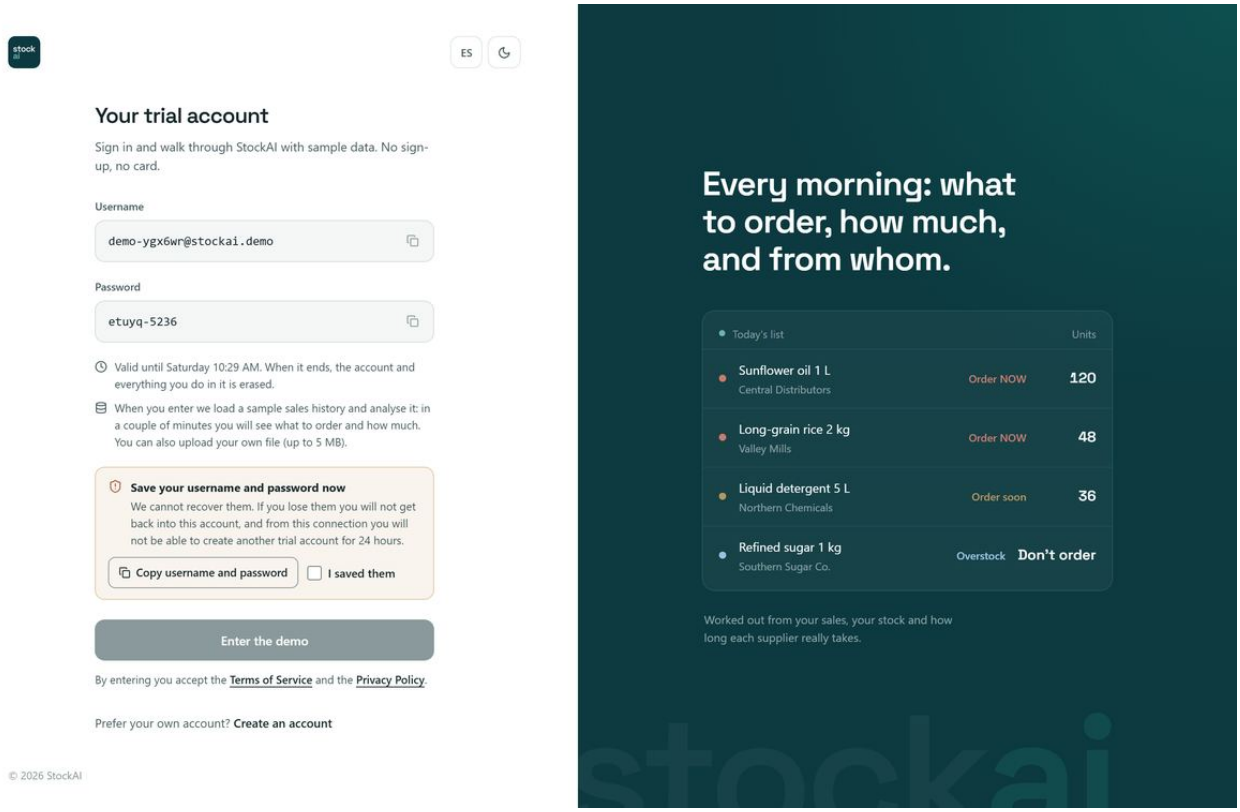
If your email has no company sign-in, the screen says «That email has no company sign-in. Sign in with your email and password.» and the normal form stays where it was.

More sign-in problems: Account and access.

Try without signing up

The trial account: a username and password on the spot to walk through StockAI with sample data for 24 hours, with no email and no card.

From the home page, «Try it without signing up» opens Your trial account. On arrival StockAI creates a trial company with a made-up username and password, and shows them to you. It asks for no email, name or card.



The freshly created trial account. «Enter the demo» stays off until you confirm you saved the details.

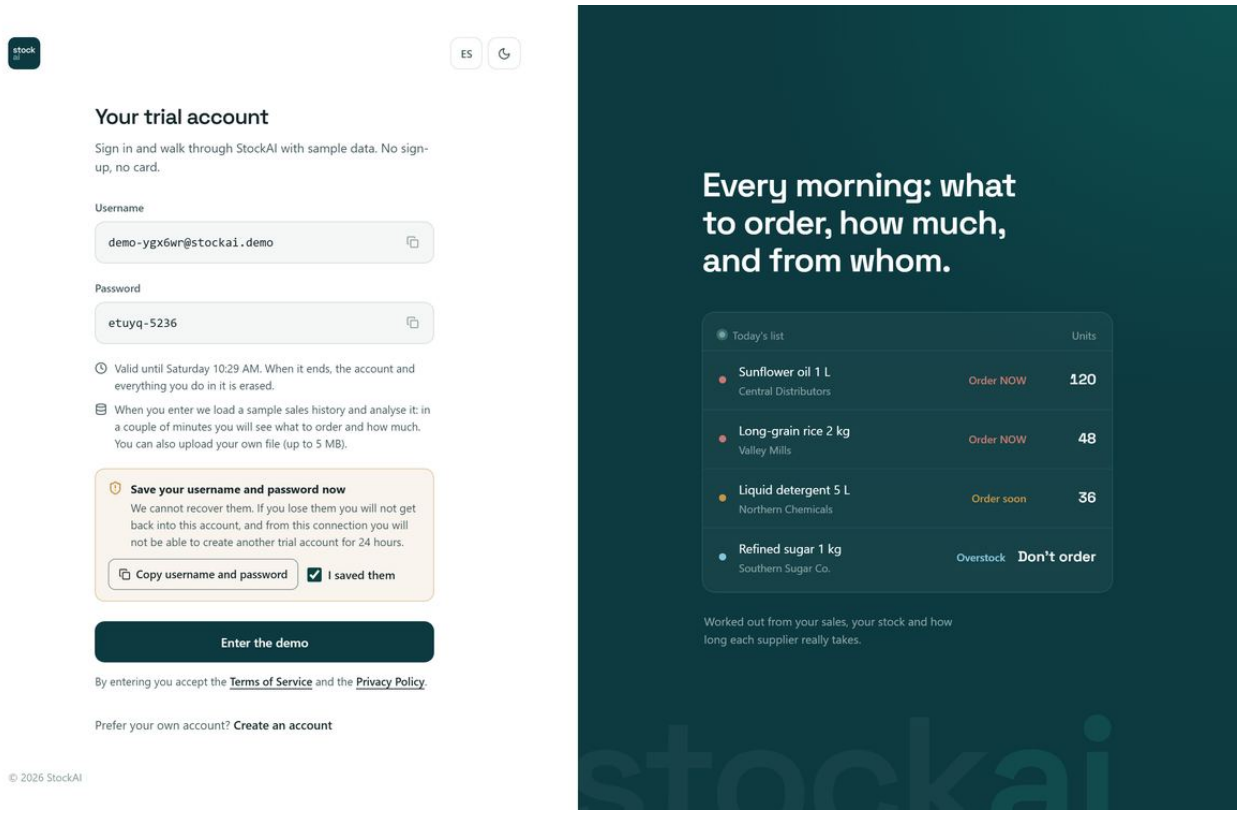
WHAT IS ON THE SCREEN

Setting up your account…	Shows for a few seconds while the account is created.
Username	A made-up address like `demo-xxxxxx@stockai.demo`. That domain does not exist: nobody can receive email there and StockAI never sends anything to it. The button on the right copies it.
Password	A generated password (five letters, a dash and four digits, with no look-alike characters). The button copies it.
Valid until …	The day and time it ends. When it ends, the account and everything you did in it is erased.
When you enter we load a sample sales history…	What happens when you enter: a sample sales history is loaded and analysed; in a couple of minutes you see what to order and how much. You can also upload your own file of up to 5 MB.
Save your username and password now	They cannot be recovered: the server keeps only a fingerprint of the password. If you lose them you will not get back into that account.

Copy username and password	Copies both to the clipboard together.
I saved them	Required box to enable entering.
Enter the demo	Signs in with the trial account and takes you to My sales with the sample load under way.
By entering you accept the Terms of Service and the Privacy Policy.	The acceptance is recorded when the account is created.
Prefer your own account? Create an account	Opens Create your account.

ENTERING THE DEMO STEP BY STEP

1. On the home page press «Try it without signing up» and wait for the username and password to appear.
2. Press «Copy username and password» and paste them somewhere at hand (or copy them one by one).
3. Tick «I saved them».
4. Press «Enter the demo». You see the sample sales load and the analysis progress until there is a traffic light to look at.
5. To come back later within the 24 hours, go through Sign in with that username and password.



With «I saved them» ticked, the button turns on.

> Reloading does not create another account

If you reload the page in the same tab you see the same account: the details are kept in that tab until the account ends. A new tab does create another account.

WHAT A TRIAL ACCOUNT CAN AND CANNOT DO

Limit	Value
Duration	24 hours from creation
Products (SKUs)	30
Users	1 (you cannot invite anyone)
Analyses at a time	1
File size	5 MB
Trial accounts per connection	3 a day

· It sends nothing outside: since its address is made up and never verified, invitations, sending orders to suppliers and notifications stay closed.

· While you use it, a «Trial account» strip reminds you how long is left («ends in N hours.») and that everything is erased when it ends, with a «Write to us» button to ask for a real account with your own data.

· When it ends, sign-in refuses it («This trial account has ended…») and the account is erased within the next hour. If before it ended you wrote to us asking for a real account, the account is not erased while that request is pending.

IF IT CANNOT BE CREATED

«You already created several trial accounts from this connection today…»	You reached 3 accounts today from your connection. Use the one you have or come back tomorrow.
«No trial accounts are available right now…»	The installation reached its ceiling of live trial accounts, or of accounts created in the last hour. Try later.
«We could not create the trial account…» · Try again	Another problem. The «Try again» link repeats the creation.

Recover your password

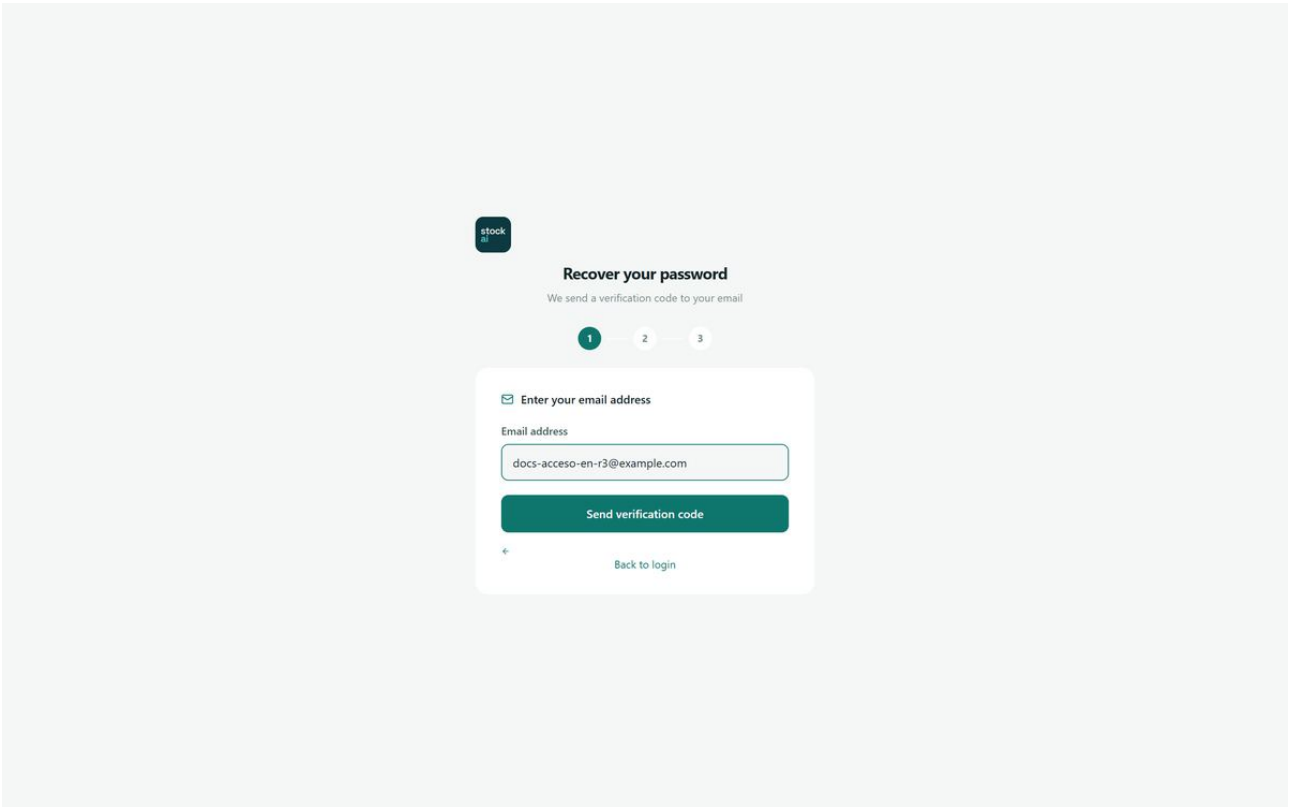
Changing a forgotten password in three steps: your email, the 6-digit code you receive and the new password. Also what the «Set a new password» link screen does.

From Sign in, the «Forgot password?» link opens Recover your password. You do not need to be inside the app or ask an admin: a code arrives at your account's email.

At the top, three numbered circles show which step you are on; completed steps turn green with a tick.

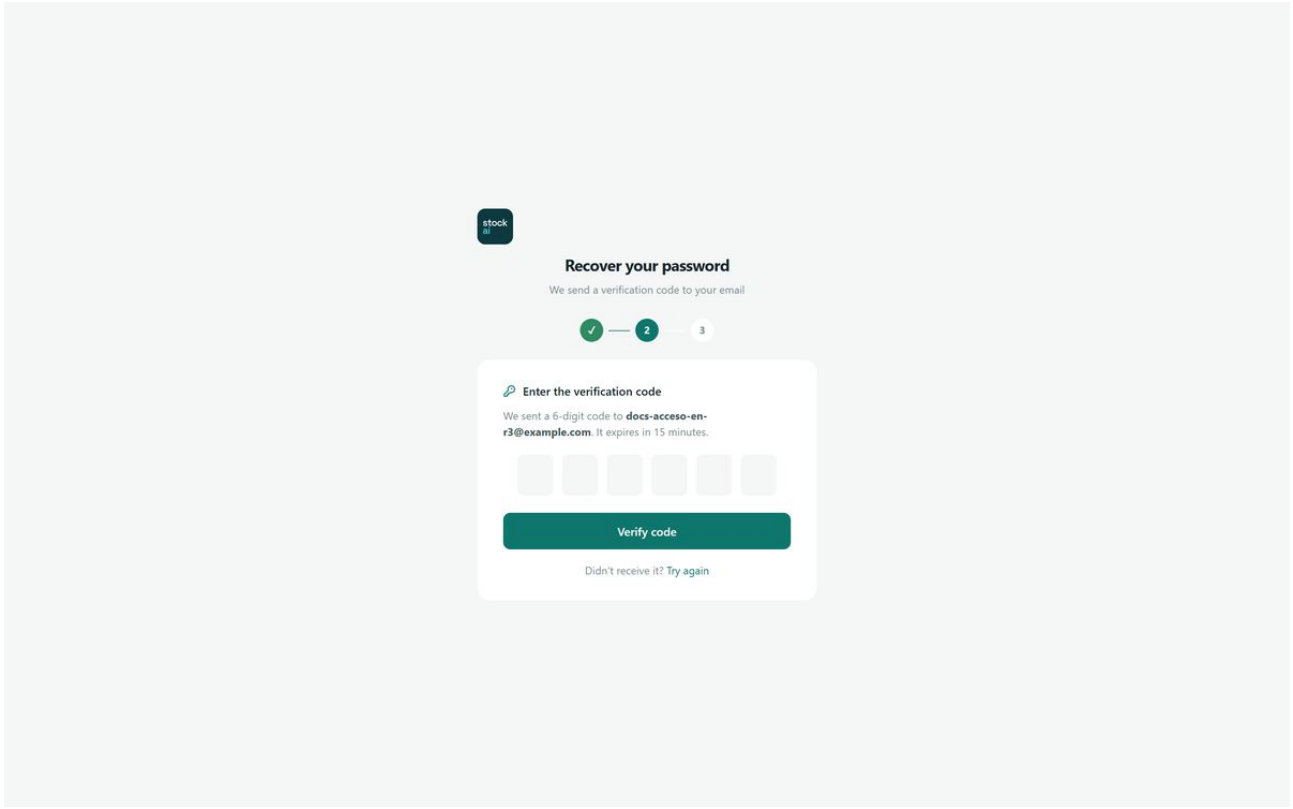
THE THREE STEPS

1. Enter your email address and press «Send verification code».
2. Check your email: a 6-digit code arrives that expires in 15 minutes. Type it in the six boxes (each digit moves the cursor to the next box; backspace goes back) and press «Verify code».
3. Type the New password (at least 8 characters, with letters and digits), repeat it in Confirm password and press «Reset password».
4. You see «Password updated!» and a few seconds later the screen takes you to sign in. Sign in with the new password.



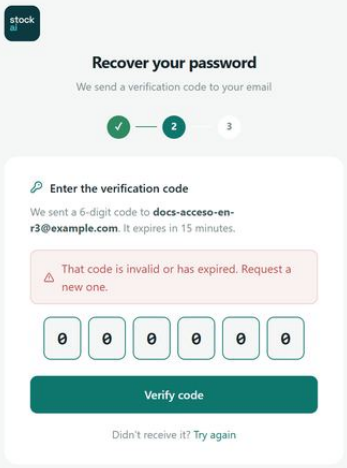
Step 1: your account's email.

> It always moves on to step 2
>
> Whether or not an account exists for that email, the screen moves on to the code step. That is on purpose: nobody can use this screen to find out which emails are registered. If the code does not arrive, check the email you typed and your spam folder.

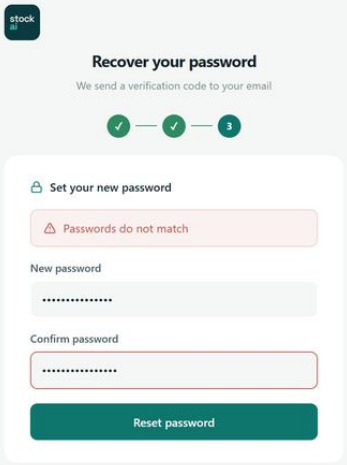


Step 2: the 6-digit code from your email.

Didn't receive it? Try again	Goes back to step 1 to ask for another code. Asking for a new one voids the previous one.
«Enter all 6 digits of the code»	Some digits are missing.
«That code is invalid or has expired. Request a new one.»	Wrong, expired or already used code. Each code allows 5 failed attempts; after that you must ask for another. On top of that, one email can attempt 10 verifications every 10 minutes.



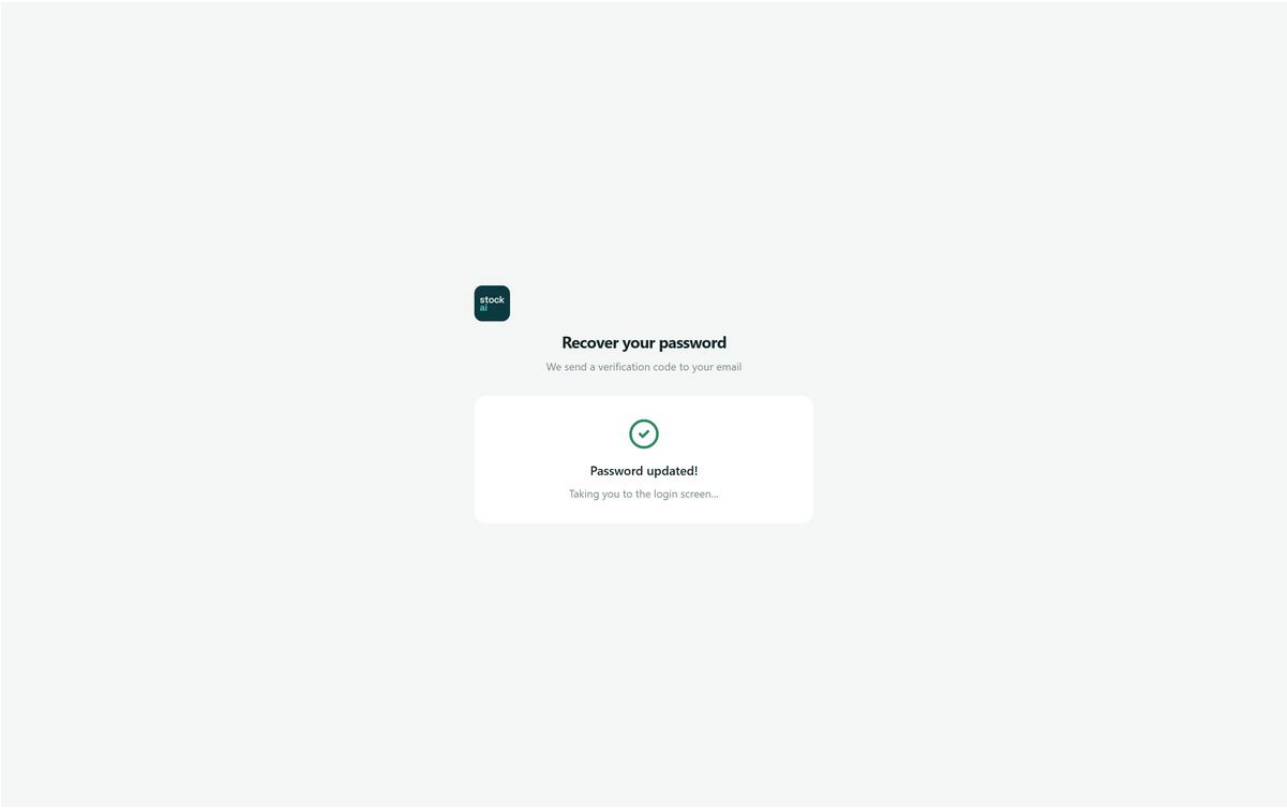
A wrong code is refused; after 5 failures you need another one.



Step 3: if the two passwords differ, the second field turns red and nothing is saved.

«Passwords do not match»	The two fields differ.
«Password must be at least 8 characters»	It is too short.

«The password must be at least 8 characters long, with at least one letter and one digit.»	It does not meet the server rule. Your company may require its own rules on top (minimum length, uppercase, symbols).
«This password reset link is invalid or has expired…»	More than 10 minutes passed since you verified the code, or that step was already used. Start again.

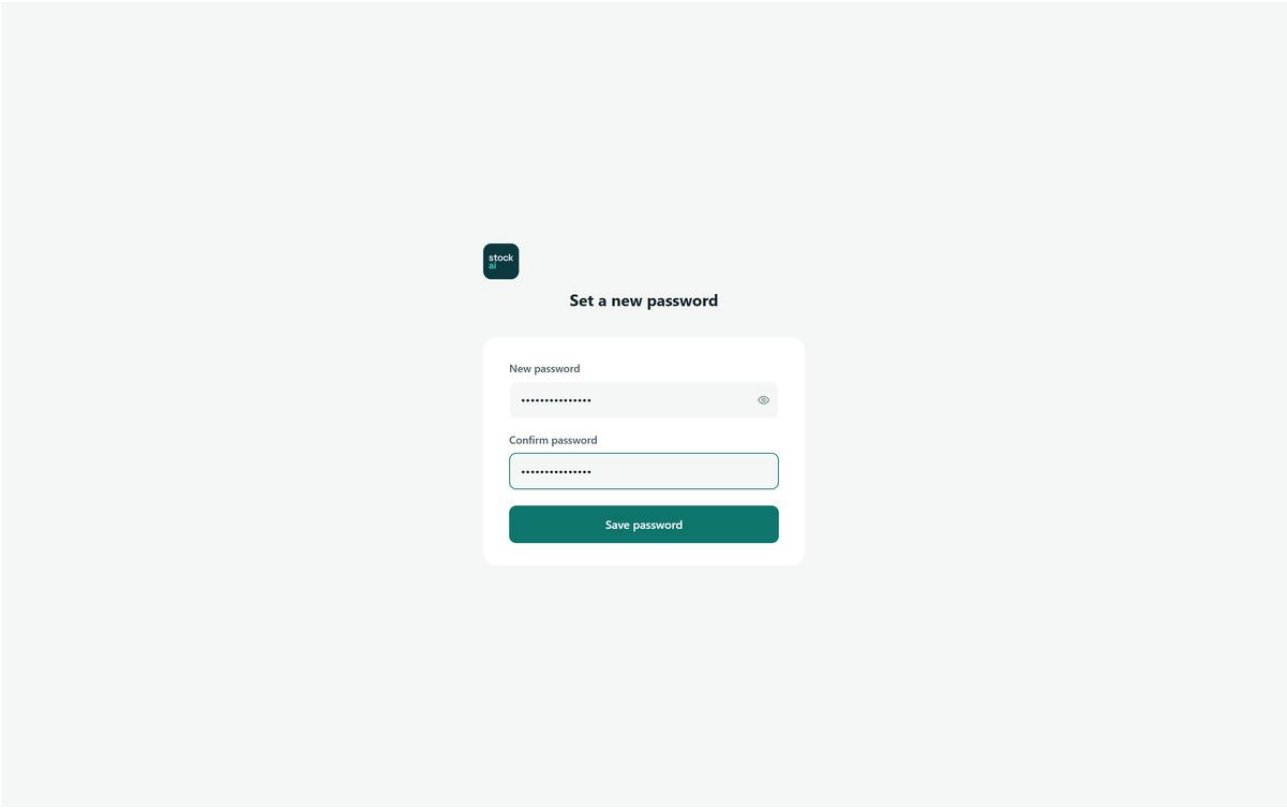


Password changed.

> Changing it signs out all your sessions
>
> Saving the new password signs out every session open with your user, in any browser or phone, including this browser. That is what you want if somebody else knew your password: their session stops working at that moment.

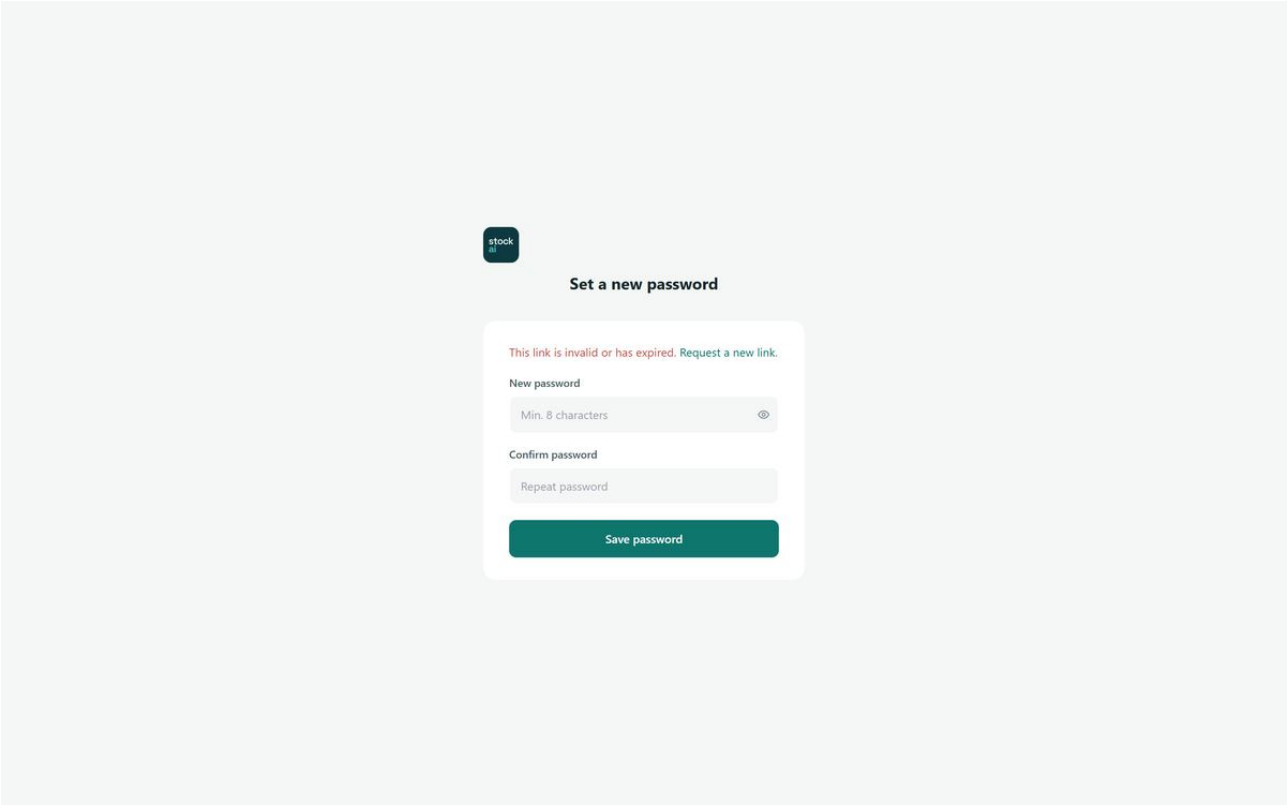
THE «SET A NEW PASSWORD» SCREEN

If you receive a password-change link (it carries `?token=` in the address), it opens the «Set a new password» screen: type the New password and Confirm password (the eye shows or hides both) and press «Save password». When it finishes it says the password was updated and takes you to sign in. That link works once.



The screen a password-change link opens.

With no token, or an expired one, the screen warns «This link is invalid or has expired.» with a «Request a new link» link (which leads to the three steps above) and the button stays off.



A link without a token: the button cannot be used.

Supplier portal

The page your supplier receives with the purchase order: they confirm quantities and delivery dates line by line, propose changes or mark what they cannot supply, with no account.

When you send an order from Orders with «Ask the supplier to confirm», each supplier receives, besides the PDF, a secure link to a page where they confirm what they will deliver and when. The supplier needs no account or password: the link is their credential.

HOW THE SUPPLIER GETS THE LINK

1. In Orders, open the order and choose to send it to the suppliers.

2. Leave «Ask the supplier to confirm» ticked («Each supplier gets a secure link to confirm quantities and delivery dates, with no account needed.»). The choice is remembered for next time.

3. Send. Each supplier on the order gets their own link, which shows only their lines. The result notice says who got it («Confirmation link sent to: …») and who did not.

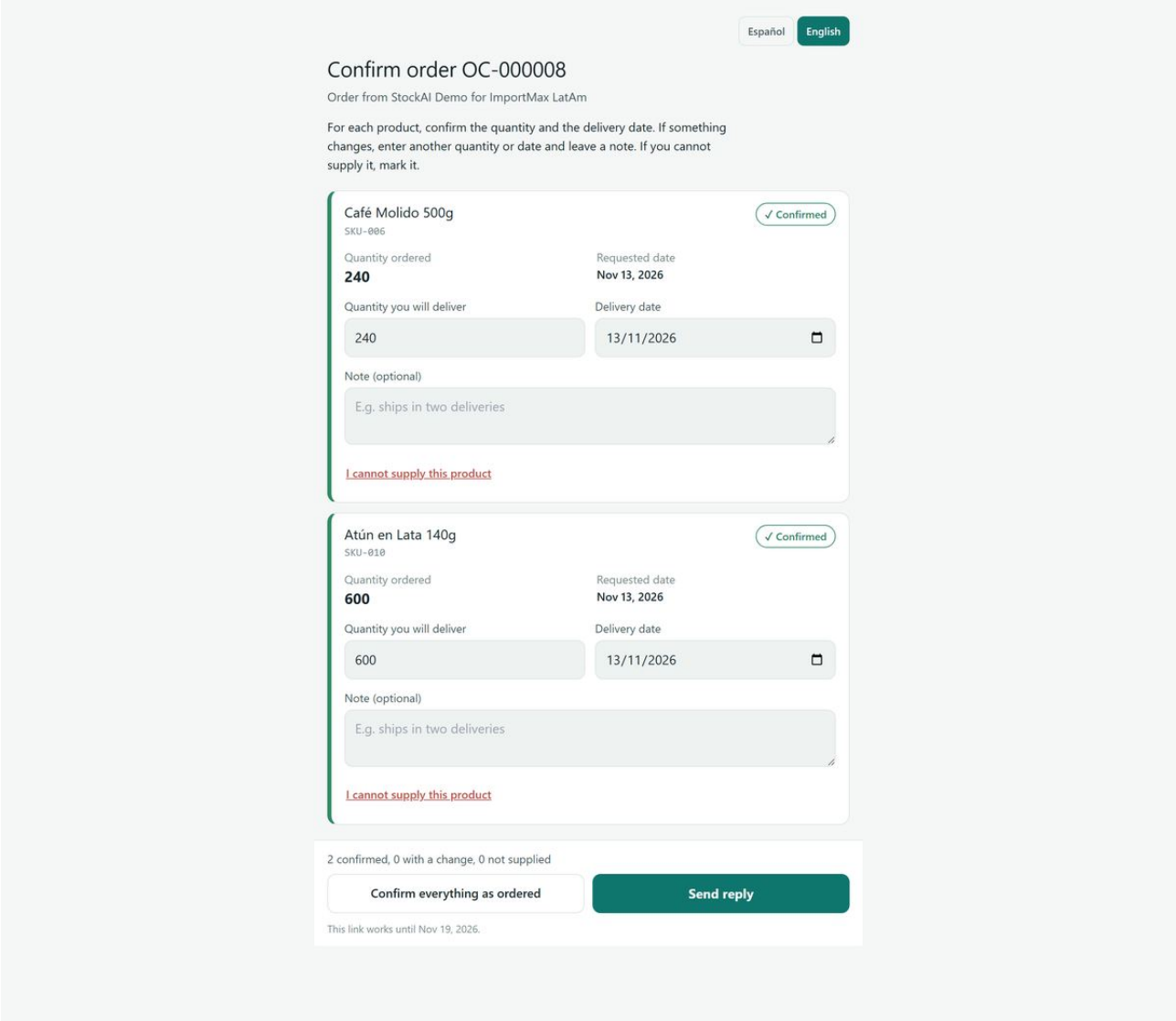
· The link always goes by email. By WhatsApp it goes only on the Pro, Max and Corporate plans; a supplier reachable only by WhatsApp on a plan without it gets no link («No confirmation link for: …»).

· The link works for 21 days, or until 7 days after the order's expected arrival if that is later.

· Sending the order again creates a new link and the earlier one stops working; answers already received are kept.

· To send orders to suppliers your email must be verified and your role must be analyst or admin.

WHAT THE SUPPLIER SEES



The supplier page, as it opens from the email.

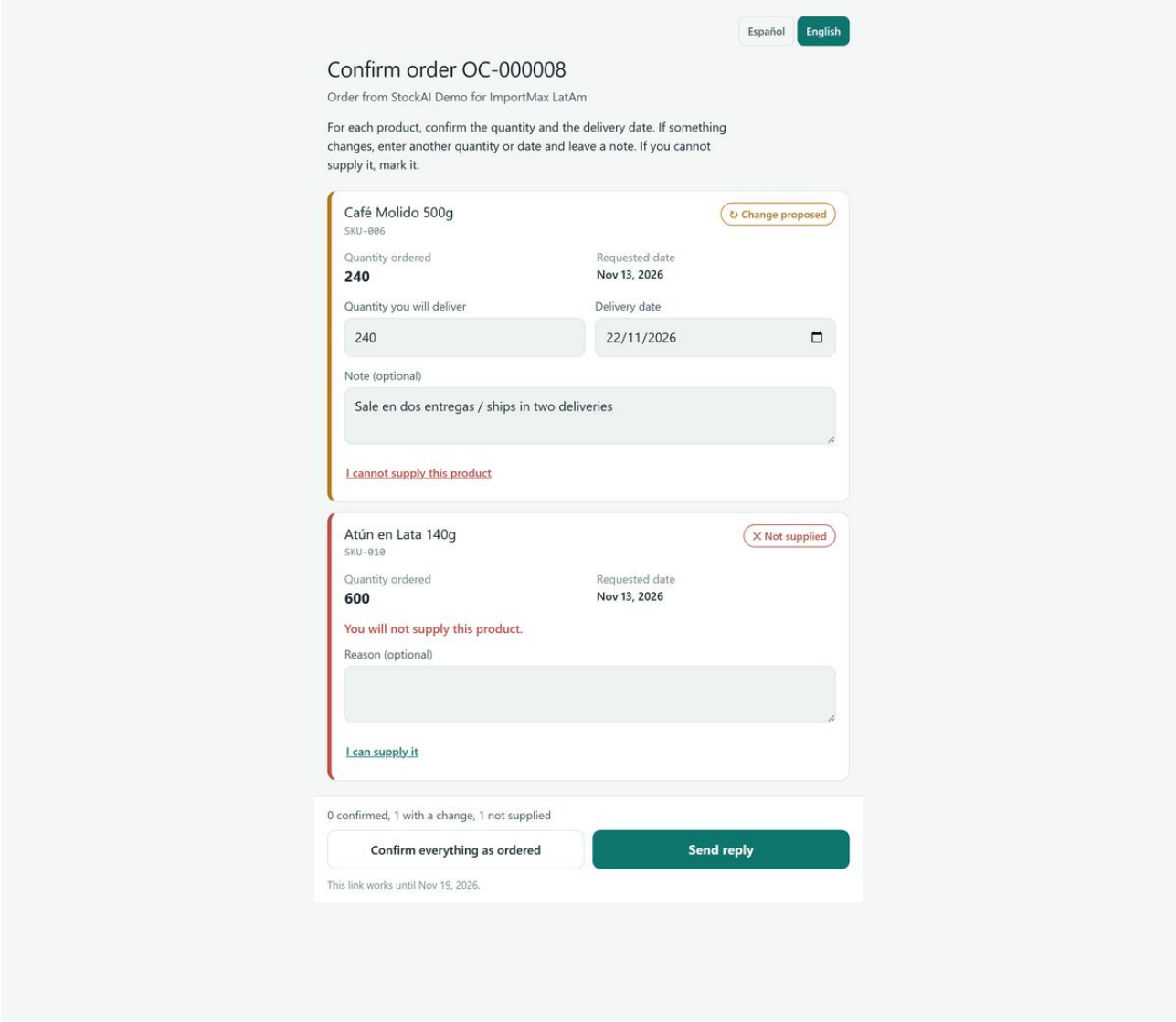
The page opens in the language of whoever sent the order; the Español / English buttons at the top switch it (on that page only). It shows only what is needed to answer: never prices, costs, stock or other orders.

Confirm order {number}	The order number.
Order from {your company} for {supplier}	Who orders, and from whom.
Product name and code	Each line of the order that belongs to that supplier.
Status tag	Confirmed (green): same quantity and same date as ordered. Change proposed (amber): another quantity or date. Not supplied (red): they marked they cannot. The tag updates as they type.
Quantity ordered	What you ordered, with its unit if you have one on file.
Requested date	The date StockAI expects the goods: the order date plus that supplier's lead time.
Quantity you will deliver	Prefilled with the ordered quantity; the supplier changes it if they will deliver a different amount.

Delivery date	Prefilled with the requested date. Accepts from yesterday up to two years ahead.
Note (optional)	Up to 500 characters, for example «ships in two deliveries».
I cannot supply this product	Marks the line as not supplied and swaps the fields for Reason (optional). «I can supply it» undoes it.
Bottom bar	The summary «N confirmed, N with a change, N not supplied», the «Confirm everything as ordered» button (puts every line back as ordered) and «Send reply», and how long the link works.

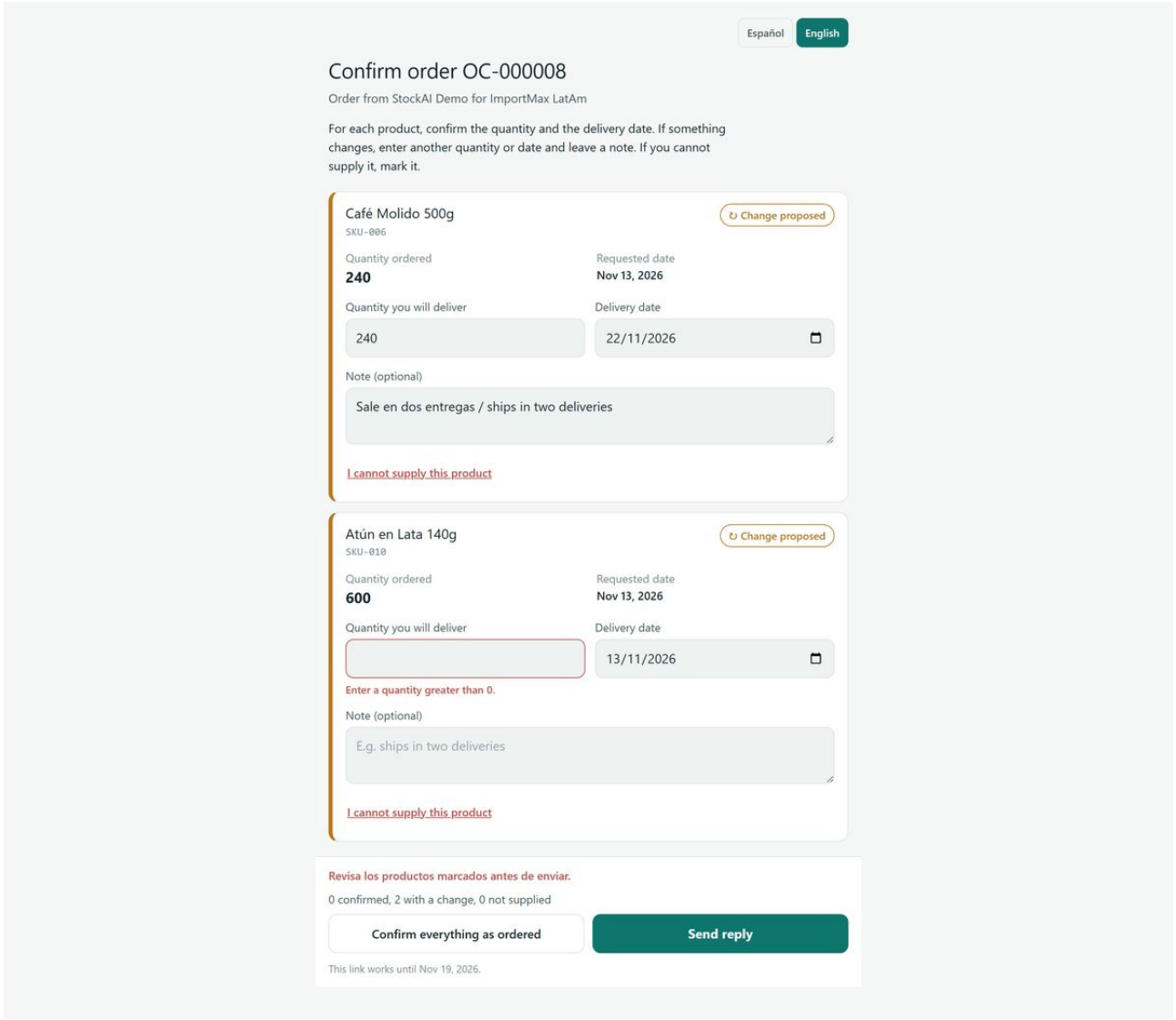
ANSWERING STEP BY STEP (WHAT THE SUPPLIER DOES)

1. Open the link from the email or message.
2. For each product, leave the quantity and date if they agree, or type another quantity or date and, optionally, a note.
3. If a product cannot be supplied, press «I cannot supply this product» and, optionally, write the reason.
4. Check the summary in the bottom bar and press «Send reply». If everything is as ordered, «Confirm everything as ordered» then «Send reply».

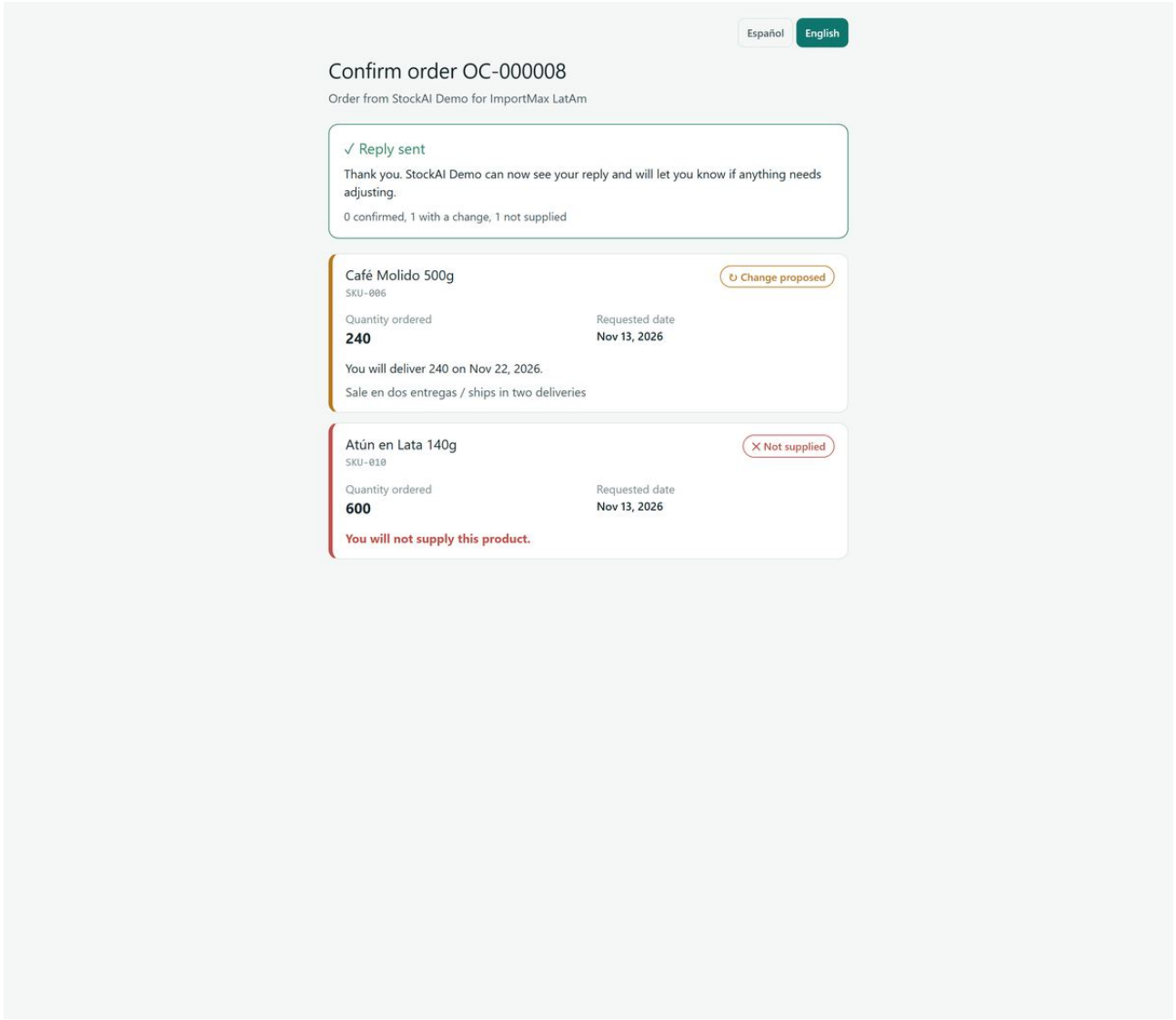


One line with another date (change proposed) and one that cannot be supplied.

Before sending, the page checks every line: an empty or zero quantity («Enter a quantity greater than 0.») or an out-of-range date («Choose a valid delivery date.») is marked in red, «Check the highlighted products before sending.» appears above the button and the page scrolls to the first line with a problem. All the lines are answered together: part of an order cannot be sent.

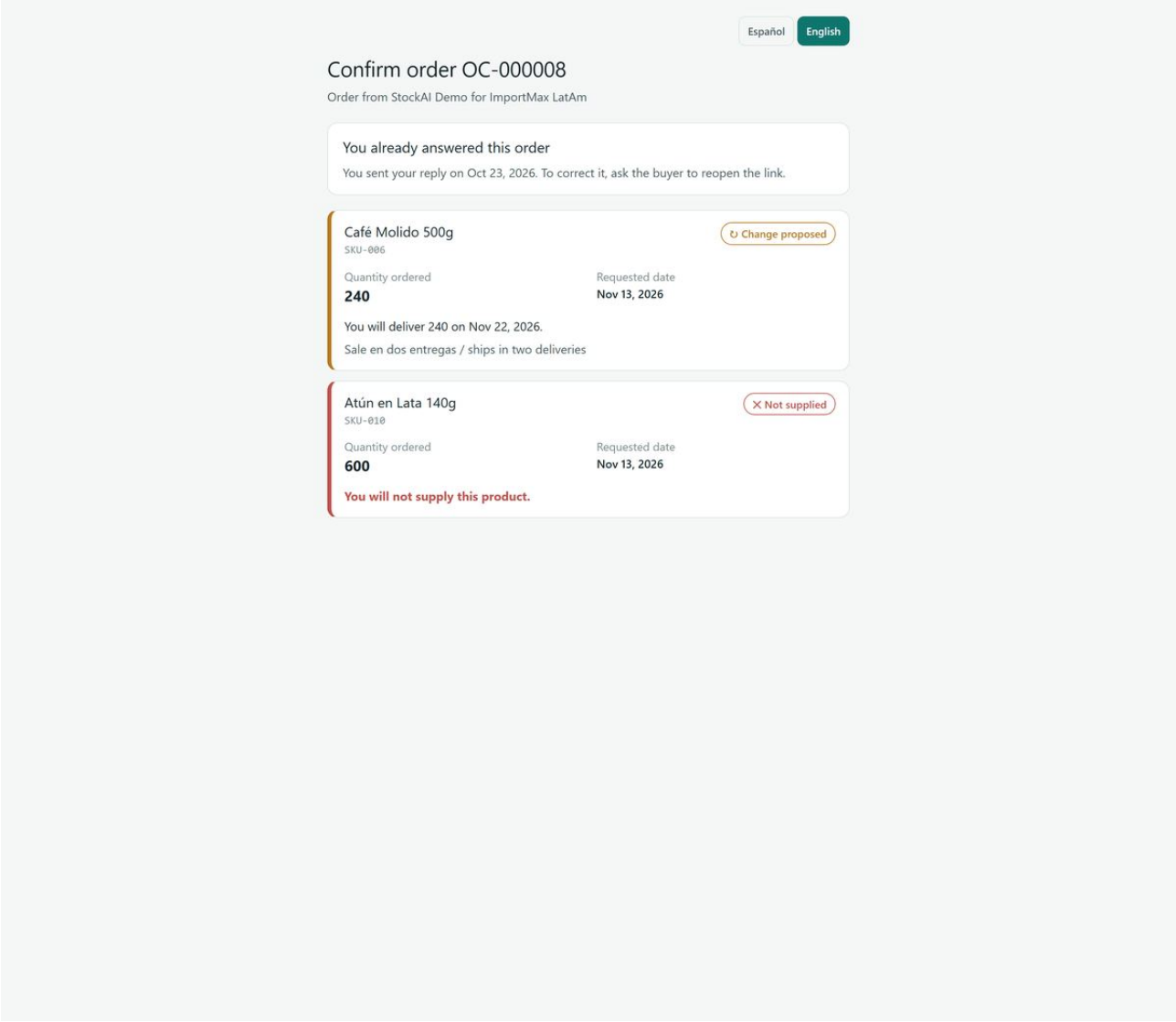


An empty quantity is not sent.



Reply sent: the buyer already sees it in Orders.

After sending, «Reply sent» appears with the summary. From then on the page is locked: if the supplier opens the link again they see «You already answered this order» with the date and, per line, «You will deliver {quantity} on {date}.» or «You will not supply this product.», plus their note. To correct it, they must ask you to reopen the link.



The link after answering: read-only until you reopen it.

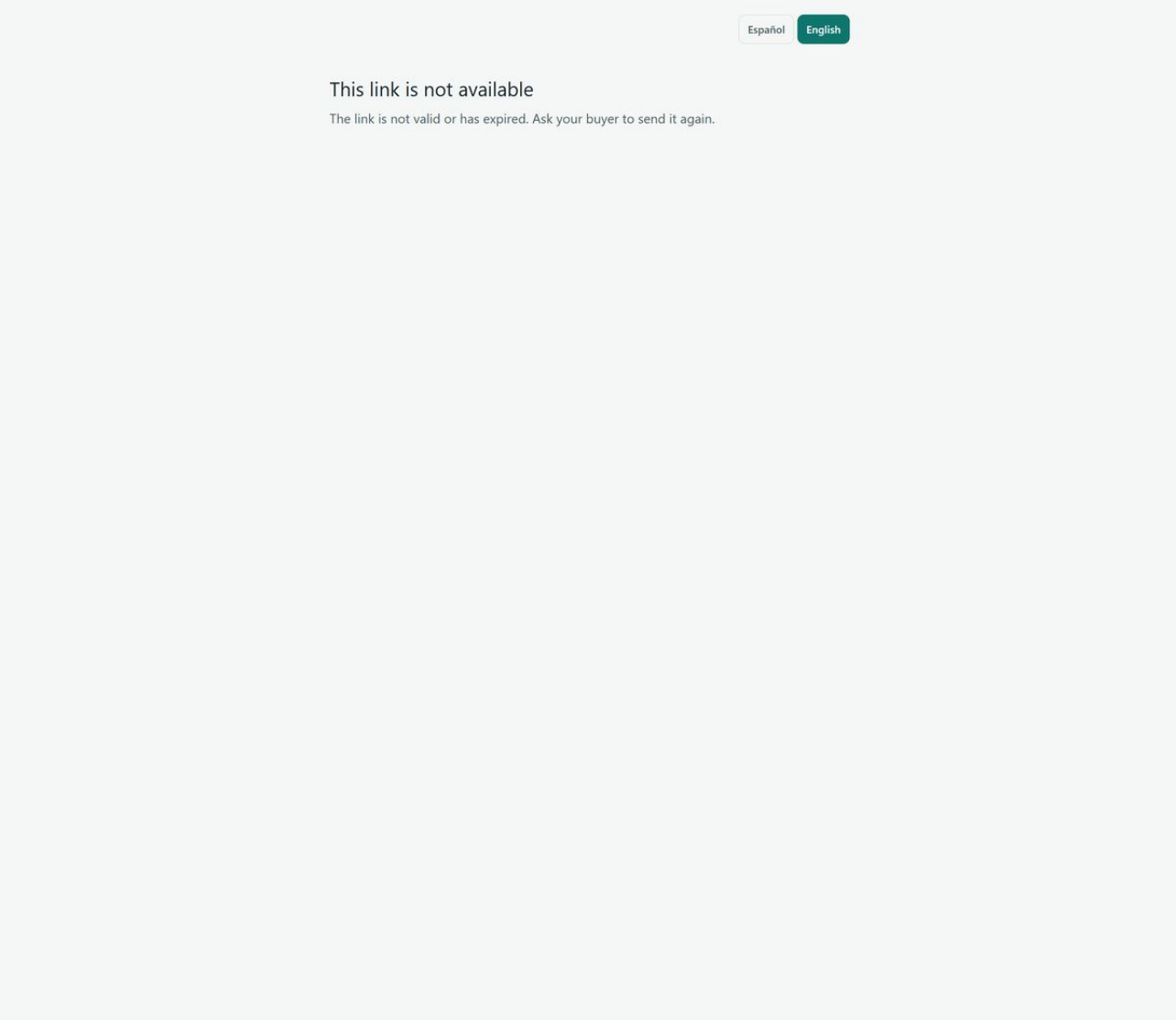
WHAT YOU DO WITH THE REPLY

On the order, in Orders, the «Supplier confirmation» block shows the link state («Waiting for a reply», «Answered on …», «Link expired», «Link revoked») and each line's answer («Promised date: …», «Proposed quantity: … (ordered: …)», «The supplier cannot supply this line.», «Supplier note»).

Accept change	Uses the supplier's promised date as that line's arrival date instead of the one StockAI estimated. It is recorded under your name and cannot be undone. What the supplier answers changes nothing by itself: only what you accept counts.
Let them answer again	Unlocks the page so the supplier can correct the reply.
Revoke link	The supplier can no longer open it; their answers are kept. To give them another, send the order again.

IF THE LINK DOES NOT WORK

A mistyped, expired or revoked link, or one for a cancelled order, shows the same screen: «This link is not available» («Ask your buyer to send it again.»). It is the same answer for every case on purpose, so nobody can probe links to guess orders. If the problem is the connection, the screen says «We could not load the order» with a «Try again» button.



Invalid, expired or revoked link.

> Usage limits
>
> To stop abuse, the page accepts a limited number of reads and replies per connection and per link every 10 minutes. Past that it says «Too many attempts from this connection. Wait a few minutes and try again.»; what was typed is not lost.

Customer portal

A private read-only link for a corporate customer: they see their commitments with your company and can tell you they received something or that a date does not work, with no account.

If you sell to corporate customers who order months ahead (demand commitments), you can give them a private link where they see only their own: product, quantity, requested date and status. They never see stock, costs, probabilities, internal notes, warehouses, suppliers or other customers.

CREATING THE LINK (YOU)

Links are created in Inventory, in the «Customer portal» panel. Only analysts and admins can create or change links, and only if their user is not limited to some warehouses (the portal is company-wide).

Customer	Pick a customer from the list: it shows those with commitments or contracts on file, with how many commitments each has.
Page language	Spanish or English: the language the customer's page opens in.
Show the dates I promise	When ticked, the customer sees a commitment's promised date, but only for those with a date set in the link's detail.
Valid for (days)	How many days the link works: 90 unless you change it, up to 365.
Create link	Creates the link and shows it only once with «Copy link». Copy it and send it to the customer: for security it is not shown again. If you lose it, revoke it and create another.

The «Links» list shows, for each one, when it expires, whether the customer opened it («Last opened: …» or «Not opened yet») and how many answers they left. «Details» shows what the customer sees, their answers, and lets you set each commitment's Promised date (it does not change the commitment's date; it is only what the customer sees). «Revoke» cuts access (answers are kept) and «Reopen» restores it for at least 30 more days.

WHAT THE CUSTOMER SEES

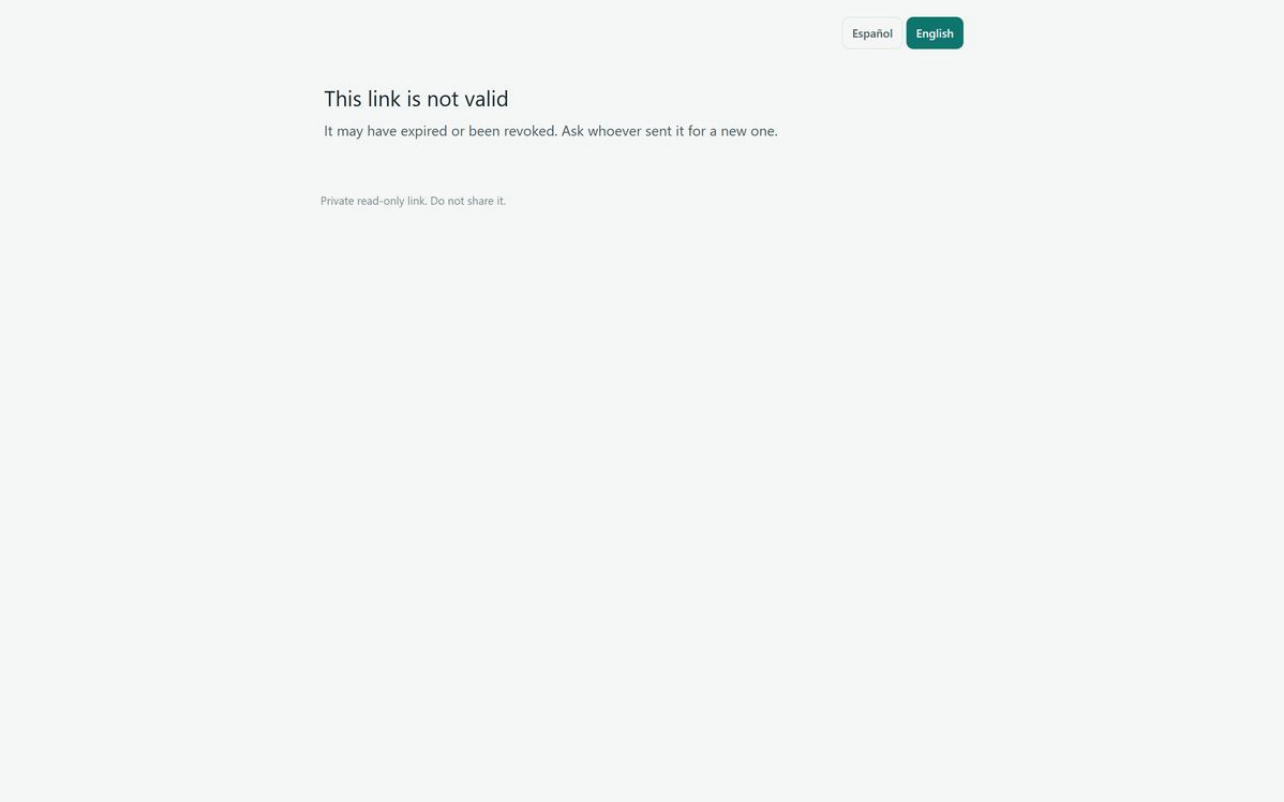
Español / English	Switches the language on that page only.
Your orders with {your company}	The title, with the customer's name below and the explanation «These are your commitments with {your company}, read-only. If something does not match, tell us from here.»
Each commitment	Product and code, the status tag (In progress, Delivered or Cancelled), Quantity, Requested date and, if you share it, Promised date.
I received it	The customer confirms receipt. It is recorded once; repeating it duplicates nothing.
The date does not work for me	Only on commitments in progress. Opens «Tell us which date would work»: a required comment of up to 500 characters, with «Send» and «Cancel».
Footer	«Private read-only link. Do not share it.»

1. The customer opens the link you sent.
2. They review their commitments.
3. If they already received something, they press «I received it» and see «Thank you, it was recorded.»
4. If a date does not work, they press «The date does not work for me», write which date would work and press «Send»: they see «Thank you, we told {your company}. Nothing changes until they reply.»

> Answering does not change the commitment
>
> What the customer answers is stored as a notice for you (it reaches the notification bell, under the person who created the link). The commitment does not change until you decide.

IF THE LINK DOES NOT WORK

An expired, revoked or mistyped link shows «This link is not valid» («It may have expired or been revoked. Ask whoever sent it for a new one.»). A connection error shows «We could not load the page…» with «Retry». There is a limit on attempts per connection and per link, and of 20 answers per commitment.



The customer portal's invalid-link screen.

> Needs the new StockAI API
>
> The customer portal is served by the new component of the StockAI API. On an installation that does not run it yet, the panel cannot create links and every link shows «This link is not valid». That is why this page has no capture of a portal with commitments.

Approve by link

Approving or rejecting a purchase order from the email or WhatsApp without opening the app: what the page shows, how the decision is taken and why each link works only once.

When an order needs approval (see Approvals), the people who can approve it get a notice. If the installation has decision links turned on, that notice carries a button that opens a page where the order is approved or rejected without signing in.

> Off by default
>
> Decision links are off by default (`APPROVAL_LINKS_ENABLED`). The installation's operator turns them on once the new API component that serves this page is running. With the option off no link is issued and approvals work as always, from the app. That is why the captures on this page show only the link-not-available state.

WHO RECEIVES THE LINK

· Every approver in your company (an active admin or analyst allowed to approve orders), except whoever asked for the approval.

· By email always; by WhatsApp only if the person has a verified number, the WhatsApp channel is configured and the plan is Pro, Max or Corporate.

· Each link is personal (one person, one order), works once and expires after 72 hours. When somebody decides the order (by link or in the app), the other links for that order stop working. Sending them again creates new links and voids the earlier ones.

WHAT THE PAGE SHOWS

Opening the page decides nothing: it only reads. That way an email program that opens links on its own cannot approve an order. The decision happens only when a button is pressed. The page opens in the browser's language and switches with Español / English.

Order {number}: waiting for your decision	The title.
{Name} asked for this order to be approved at {company}…	Who asked. The order does not go to the supplier until it is approved.
Order value	The total being decided. It shows no line costs, stock or margins.
Supplier · Warehouse · Requested · Note	The order's suppliers, the destination warehouse, when approval was requested and the requester's note.
Products (N)	Each product with its code and quantity, up to 50. If there are more: «And N more products. Open them in StockAI.»
Comment (optional)	A comment on the decision, up to 500 characters.
Approve order	Approves.
Reject	Switches the field to «Reason for rejecting (required)» and shows «Confirm rejection» and «Back».
This link is personal, works once and expires on …	Reminder at the bottom.

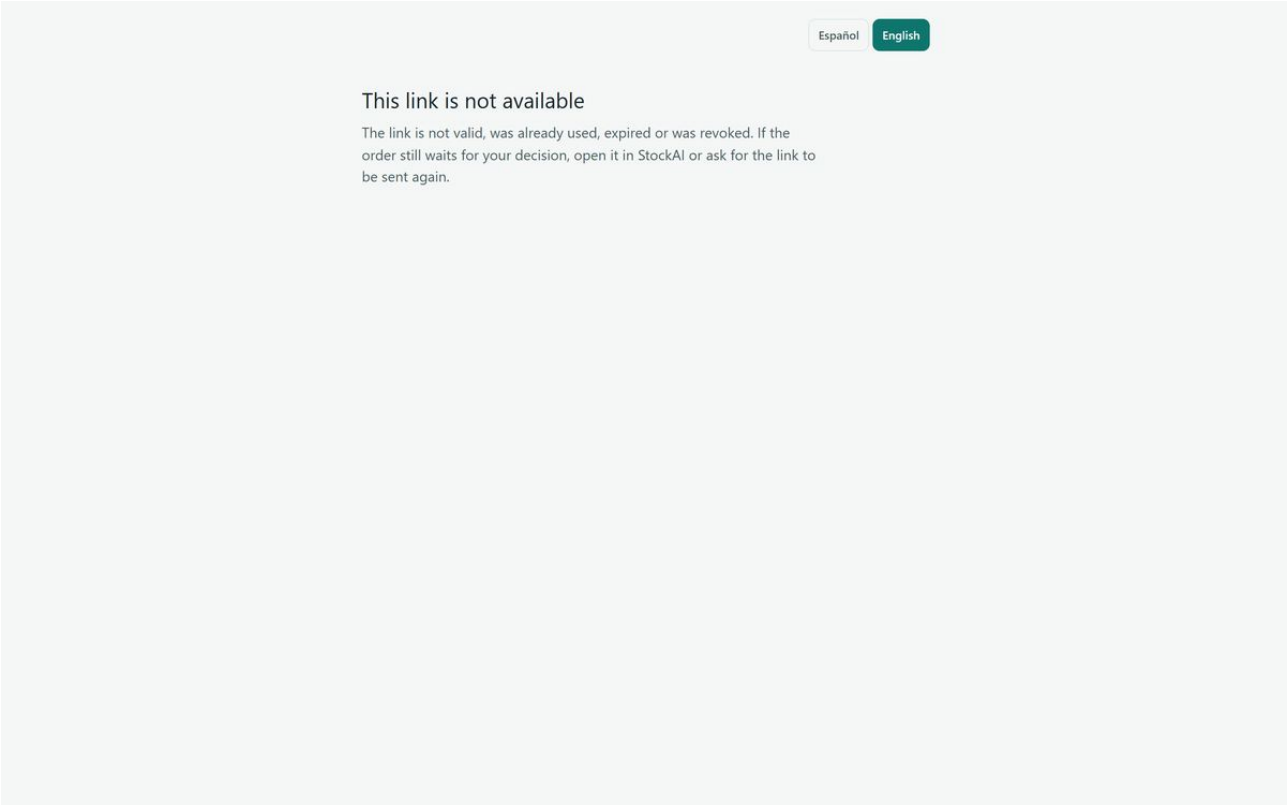
DECIDING STEP BY STEP

1. Open the button in the email or the link in the WhatsApp message.
2. Review the value, the suppliers and the products.
3. To approve: write a comment if you like and press «Approve order». You see «Order {number} approved»: the requester can now send it to the supplier.
4. To reject: press «Reject», write the reason (at least 3 characters) and press «Confirm rejection». You see «Order {number} rejected»: the order will not be sent.
5. Close the page: the link no longer works.

> If you requested the order
>
> If you requested it and, at its value, somebody else must approve it, the page says «You asked for this order and, at this value, somebody else must approve it. Here you can only reject it.» and does not show «Approve order». The same rules as in the app apply: approver permission, the warehouses you can see and the self-approval limit.

IF THE LINK DOES NOT WORK

A used, expired, voided or mistyped link, or one for a cancelled or already decided order, shows «This link is not available» («If the order still waits for your decision, open it in StockAI or ask for the link to be sent again.»). In that case decide from Orders.



The link-not-available screen.

«Write the reason for rejecting (at least 3 characters).»	You tried to reject without a reason.

«Too many attempts. Wait a few minutes and try again.»	The limit of reads or decisions per connection or per link was exceeded.
«We could not record your decision. Open it in StockAI.»	The decision did not pass an approval rule; open it in the app to see why.

AI assistant

Which data the assistant reads and what happens to that data.

Assistant privacy

Which data goes to the AI provider when you ask a question, what never leaves, and what happens if the installation has not turned the assistant on.

StockAI runs on its server: your sales, stock, suppliers and purchase orders live in that database and on that disk. The assistant is one of the few things that opens a connection to the outside, and only if the installation configured it.

ONE PROVIDER: DEEPSEEK

Every AI feature in StockAI — the web assistant, the written summaries and the data diagnosis — uses a single provider: DeepSeek, over HTTPS. There is no second provider and no fallback chain: if the key is missing or mistyped, the feature turns off; your data never ends up at another provider by accident.

WHAT IS SENT WITH EACH QUESTION

- The question you typed and the latest messages of that conversation.
- The account context needed to answer it: product codes and names, quantities, costs and supplier names for the products the question is about.
- Your first name, your role and your company name, so the answer speaks to you.
- What the read-only tools return when the assistant looks up a product, a supplier or an order.

The account brief is capped at about 7,000 characters per question: it is a selection of what is relevant, not your whole database.

WHAT IS NOT SENT

- Your original sales files or your full history.
- Passwords, API keys or credentials.
- Anything while you are not asking: there is no telemetry and no background traffic to the AI provider.

The forecast, the stock signal, purchase recommendations and alerts are computed on the StockAI server and never go through the language model.

IF THE INSTALLATION DOES NOT TURN IT ON

Without the DeepSeek key, nothing goes to the AI provider. The assistant does not error out: the screen says it is unavailable and, if you ask anyway, it answers with a rule-based summary of your data that opens with "The AI assistant is not enabled on this installation, so here is what your data says directly:". What you lose is the conversation; the rest of StockAI works the same.

Turning it on is done by whoever administers the server, under Installation, card "Assistant (DeepSeek)".

YOUR OWN AI CLIENT (MCP)

This is the opposite direction (and it comes with the Pro, Max and Corporate plans): if you connect your own AI client to StockAI over MCP, StockAI opens no connection; your client calls in, reads

with your API key and leaves. That client can read your stock, your costs and your supplier names, so treat the key like any other credential and revoke it once it is no longer used.

The full data-processing terms are in the Privacy policy.

Integrations

API, SQL sources, WhatsApp and email. The API, MCP and WhatsApp alerts start on the Pro plan.

The StockAI API

Connect your ERP, your point of sale or your own system to StockAI with an API key: the same work you do in the app, without anyone opening it.

> The API comes with the Pro, Max and Corporate plans and with trial accounts (one key and 200 calls a day). The free plan has no keys: the API screen shows the feature locked and how to write to us. The full walk-through is in API step by step.

The API lets another system do what you would do by hand: upload the sales export, ask for a recalculation, read the stock signal and log the purchase order. This page explains how it works without code; the full reference, endpoint by endpoint with examples, is in the developer documentation.

API KEYS

You create a key under Automation, on the "API Keys" tab, with "Generate key". Give it a name you will recognise (for example "ERP integration") and choose what it can do:

Read only	Acts as a read-only user: it reads the stock signal, the forecasts, your data sources and a training run's status, and changes nothing.
Read and write	Acts as an analyst: it can also upload files, queue trainings and log purchase orders.

The full key starts with `sk_live_` and is shown only once, when you create it. StockAI keeps it nowhere it can be read back: if you lose it, create another and revoke the old one. Revoking is immediate; whatever was using that key stops working on its next call.

> An account can have a ceiling on keys. See Plans and limits.

MAKING A CALL

Every route hangs off `/api/v1` on your installation's domain, and the key goes in the `Authorization` header:

```
curl https://<your-domain>/api/v1/planning \
  -H "Authorization: Bearer sk_live_..."
```

That call returns `active_session_id`, the run the stock signal is computed from today. Ask for it every time rather than storing it: it changes whenever a new run trains.

Successful responses carry your content inside `data`. Errors carry a stable `error_code` and an English sentence in `detail`. If your system has to decide what to do about an error, let it decide on `error_code`: the wording can change, the code does not.

LIMITS AND USAGE

- 120 calls per minute per key, on every plan that includes the API.

· Past a limit you get a 429 with a `Retry-After` header saying how many seconds to wait before retrying.

· Every call that passes all checks adds one to that key's daily usage. Refused calls do not count. An administrator sees usage by key and by day on the API screen.

WHAT A KEY CAN AND CANNOT DO

A key can do almost everything you do in the app: inventory, suppliers, forecasts, data sources, trainings, scenarios, purchase orders and receptions. Some things are never reachable with a key, on purpose, because they belong to a person and not to a system:

· Signing in, users and roles, and the API keys themselves.

· Personal preferences, team messages and conversations with the assistant.

· Exporting or deleting the account, and the installation's configuration.

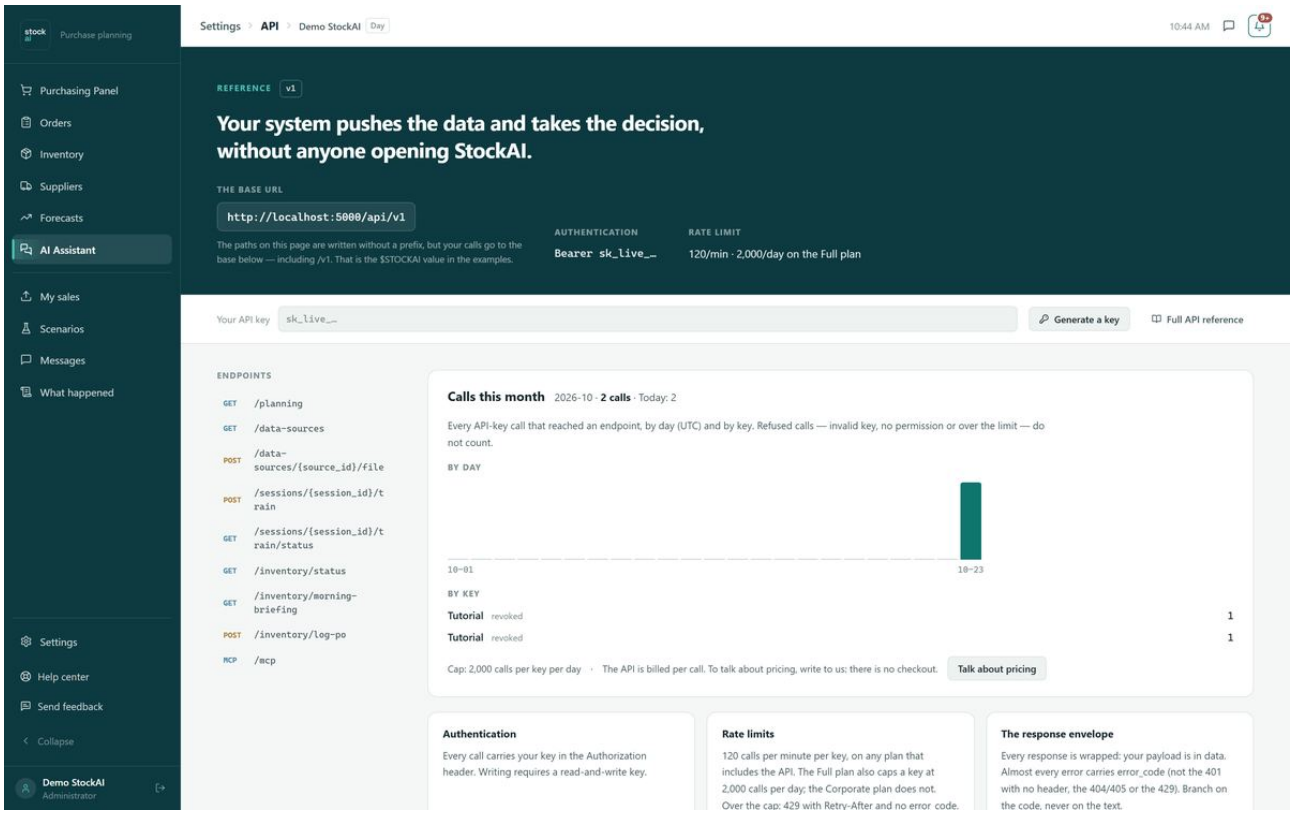
· The stock signal rules, marking an order as paid, and cancelling or reopening an order.

Try one and the answer is `api_key_route_not_exposed`: "This cannot be done with an API key (users, keys, configuration or account deletion). Do it in the app." A read-only key that tries to write gets `api_key_scope_insufficient`.

> Before a key can send anything out
>
> Until at least one administrator on the account has a verified email, a key cannot send anything outside StockAI (an order to a supplier, for example). Verify an administrator's email first.

TRYING IT WITHOUT WRITING CODE

The app's API screen is both a guide and a console: it shows your installation's "The base URL", has a "Your API key" field where you paste the key (it lives only in that tab) and, on each call, a "Run" button that really runs it against your account and shows the response, plus an "Example" with the same call written as `curl`.



> "Run" acts on the account of the key you use; with a real key, on your real data (to try things safely, create a sandbox in Automation → API Keys): uploading a file replaces that source's file, and logging an order makes it appear under Orders. Before every write the console asks you to confirm and names the consequence.

AN INTEGRATION'S TYPICAL LOOP

1. Create a "Read and write" key.
2. Call `GET /planning` to learn which run is active.
3. Upload the latest sales export onto the source you already use.
4. Queue the recalculation (or let a schedule do it) and poll its status until it reads `COMPLETED`.
5. Read the stock signal and build the order from the signal and the recommended quantity.
6. When the order really goes out, log it in StockAI. Without that record the order does not exist for StockAI, and your suppliers' real lead time is never learned.

If what you want is not a system running on its own but asking an AI assistant what to buy, see MCP.

SQL data sources

If your sales live in a database, StockAI can query it directly from Data sources and save the result as a sales file.

Besides uploading a CSV or an Excel file, you can connect StockAI to your system's database, write the query that brings your sales, and train on the result. You do it under Data sources (/archivos), the second tab of My sales.

SUPPORTED DATABASES

Engine	Default port
PostgreSQL	5432
MySQL	3306
SQL Server	1433
Oracle	1521

CREATING THE CONNECTION

1. In Data sources, press "New Data Source" and choose "SQL Database".
2. Type a name, pick the "Engine" and fill in host, port, database, username and password.
3. Press "Create Connection" and then "Test Connection": it should say "Connection successful". Until you test it, the source cannot be queried.

> Use a database user that can only read. StockAI runs only the queries you write and creates, changes or deletes nothing on its own, but a read-only user guarantees that a badly written query cannot touch your database.

WRITING AND TESTING THE QUERY

On the "Query Editor" tab you write the SELECT that brings your sales. The columns it returns are the columns the source will have: at least a date, a product and the quantity sold, just like a file. "Run" shows a preview of up to 500 rows; "Save Query" keeps it on the source. Each query has 30 seconds to answer.

"Download Excel" downloads the full result as `.xlsx`, in case you want to check it before using it.

TRAINING ON THE RESULT

"Use as dataset" runs the full query and saves the result as a new file, which appears under My sales ready to train, just like one you uploaded. From there you follow the same path as uploading your sales: confirm the columns and let the system learn.

· The result can have up to 500,000 rows. If the query returns more, StockAI does not cut it: it refuses with "The query returned more than 500000 rows, the save limit. Narrow it with WHERE or LIMIT."

· If the query returns nothing: "The query returned no rows — there is nothing to save."

· If the database rejects the query, the message starts with "The query failed:" followed by the error exactly as your database gave it.

WHAT IT DOES NOT DO: SYNC ON ITS OWN

Saving the result is a snapshot, not a live connection. That is deliberate: a forecast has to be reproducible against the data it trained on.

> Scheduled recalculations do not re-run your query
>
> A schedule retrains on the data the run already has; it does not query your database again. To use new sales, press "Use as dataset" again and train on that file, or push the export through the API.

WhatsApp

What StockAI sends you over WhatsApp, what it sends your suppliers, and what has to be set up for it to work.

StockAI uses WhatsApp for four things. All of them go out through a Twilio account: your installation's or, if you set one up, your own company's.

WHAT GOES OUT OVER WHATSAPP

Orders to suppliers	"Send order" under Orders sends the order to every supplier with WhatsApp (or email) on their card. Those with neither are skipped, and the confirmation names them before sending.
The order to your own WhatsApp	"Send to my WhatsApp" sends you the order text so you can forward it to the supplier. "Open in WhatsApp" and "Copy message" do the same without going through StockAI.
The daily alert	Every morning, if any products are in Order NOW or Order soon, a summary reaches whoever has a linked number. See Daily alerts.
Team message heads-ups	If someone writes to you under Messages while you are not in StockAI, you get a WhatsApp heads-up, or an SMS if WhatsApp is not available. Off by default.

LINKING YOUR NUMBER

1. Open My account and find "Link WhatsApp".
2. Type your number with the country code, for example +506….
3. Enter the 6-digit code that arrives on WhatsApp. It expires in 15 minutes.
4. If you want team-message heads-ups, switch on "Get a heads-up when someone writes to you" under "Team messages".

Without a linked number you get no WhatsApp alerts. WhatsApp alerts come with the Pro, Max and Corporate plans: if your account does not have them enabled, the "Link WhatsApp" card says so (orders to suppliers go out regardless). Leaving the field empty is how you opt out of alerts on that channel.

WHAT HAS TO BE CONFIGURED

WhatsApp only works if the installation has a Twilio account configured. Whoever administers the server sees and sets it under Installation, on the "This installation" tab. Without Twilio, StockAI sends nothing over WhatsApp and says so instead of pretending it sent.

If your company wants its suppliers and team to receive messages from its own number, an administrator sets it under Installation → "My channels". Anything left empty there uses the installation's.

> Sending orders to your suppliers requires a verified email. See Account and access.

Email

Which emails StockAI sends, which sender they come from, and how to make your orders and alerts arrive under your company's name.

THE EMAILS STOCKAI SENDS

Email	To whom	Sender
Verify your email, activate an invited account	The person signing up or being invited	Installation
Code to recover or change the password	The person asking for it	Installation
Purchase order	Every supplier with an email on their card	Your company, if configured
Daily alert of products at risk	Administrators and analysts	Your company, if configured
Suppliers taking longer than usual	Administrators and analysts	Your company, if configured
Stale data reminder	Administrators and analysts	Your company, if configured
Monthly recap	Administrators and analysts, on the 1st	Your company, if configured

Account emails — verification, password and invitations — always go out with the installation's sender, even when your company has its own. That is deliberate: the message that grants access to an account speaks for the installation, and a company must not be able to send the one that resets a password.

HOW EMAIL GOES OUT

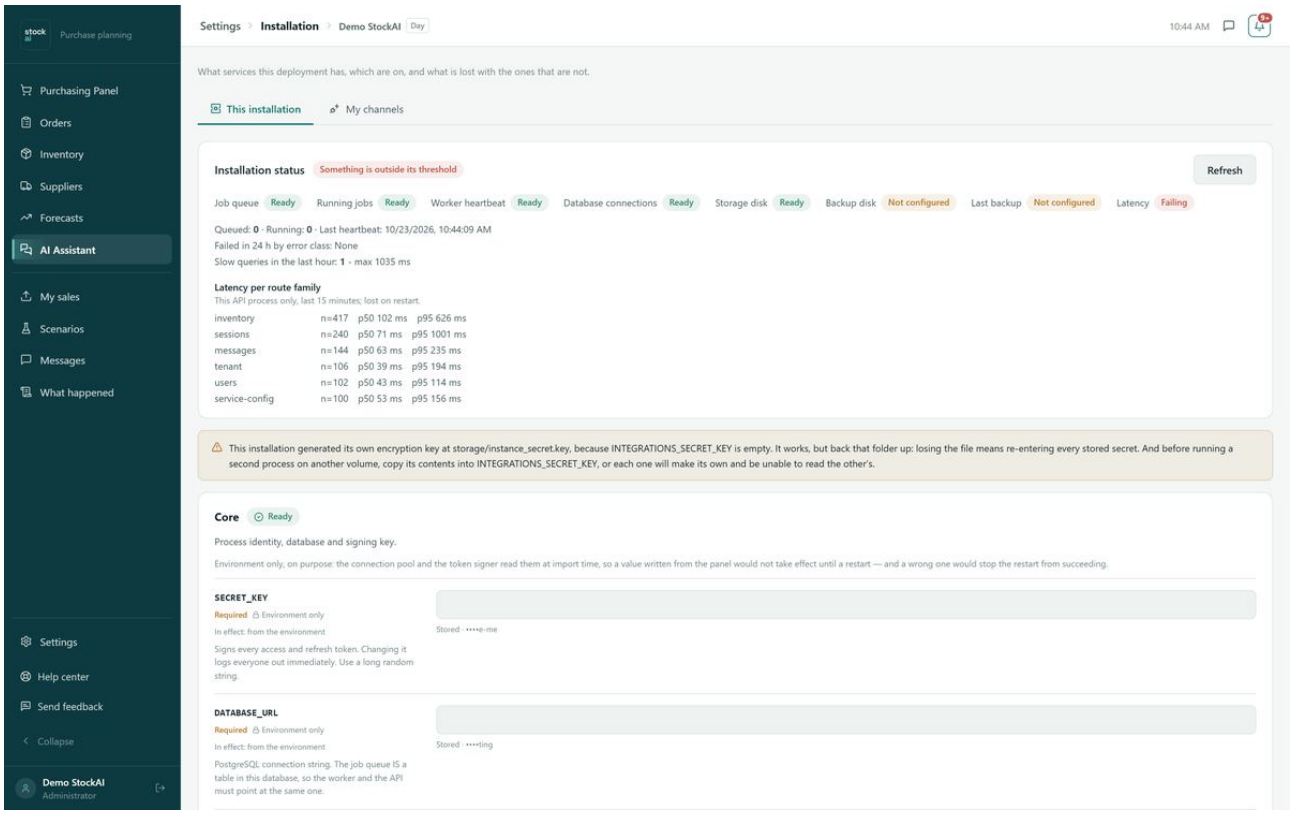
StockAI sends through Resend when a Resend key is configured, and otherwise through SMTP (host, port, username and password). Either one is enough. Whoever administers the server sets the installation's under Installation.

With no transport configured, the email does not go out and StockAI records it as not sent: it never claims to have sent something nobody received.

SENDING FROM YOUR COMPANY'S DOMAIN

1. As your company's administrator, open Installation and go to the "My channels" tab.
2. On the email card, paste your Resend key, or fill in your SMTP server's details.
3. Type the sender you want your suppliers to see.
4. Save and press "Test connection". The test asks the provider whether the credential works; it emails nobody.

From then on your purchase orders and alerts go out under your identity. A saved credential is never shown again: the panel shows at most its last four characters.



KNOWING WHETHER AN EMAIL WENT OUT

Every alert sent, and every one that failed, is recorded. You see them under What happened, alongside orders sent and orders that could not be sent. When you send an order, the screen also tells you which suppliers it reached and which were skipped.

> Trial accounts use a made-up address and never receive email.

API step by step

From the first key to every endpoint group, webhooks, MCP, clients and no-code automations.

Getting started with the API

What the StockAI API is, which plans include it, the base URL, and how to make your first call end to end.

The StockAI API lets your ERP, your point of sale or a script of your own do what a person does in the app: upload sales, update stock, train, read the stock signal, log and receive purchase orders, and take approved orders out to your ERP. This section is the step-by-step guide; the full reference for every endpoint, generated from the code, is in the developer documentation.

WHAT YOU CAN DO WITH THE API

Catalogue and inventory	Read and write stock per SKU and warehouse, suppliers, warehouses, physical counts and transfers. See Catalogue and inventory.
Forecasts and sessions	Replace the sales file, train, check training status, and read forecasts, accuracy and results. See Forecasts and sessions.
Orders and suppliers	Log orders, receive them, and take approved ones out to your ERP with a cursor. See Orders and suppliers.
Sync	Push stock from your system in idempotent batches and watch that it stays current. See Sync and files.
Webhooks	Have StockAI notify your system when an order is approved or a product is about to run out. See Webhooks.
MCP	Connect an AI assistant that reads your stock signal. See MCP.

WHO CAN USE IT

The API and the MCP server are paid features. Your account's plan decides whether it has them:

Plan	API and MCP	Keys	Calls per day per key
Free	No	0	0
Pro (`pro`)	Yes	3	2,000
Max (`max`)	Yes	10	20,000
Corporate	Yes	Unlimited	Unlimited
24-hour trial and sandbox (`demo`)	Yes	1	200

On every plan with the API, each key also has a ceiling of 120 calls per minute. If your account does not include the API, creating a key, or using one that already existed, is refused with `403` and `error_code: "plan_feature_locked"`. Within the account, analysts and administrators can create keys; a read-only user cannot.

```
curl https://app.stockai.es/api/v1/entitlements \
  -H "Authorization: Bearer $STOCKAI_KEY"


# "data": {
#   "tier": "pro",
#   "limits":   { "max_api_keys": 3, "max_api_calls_per_day": 2000, ... },
#   "features": { "api": true, "mcp": true, "whatsapp_bot": true },
#   "usage":    { "max_api_keys": 1, ... }
# }
```

GET `/entitlements` tells you, with the same key, which plan your account is on, its ceilings and how many keys it uses: useful for your integration to warn before it hits a limit.

THE BASE URL AND THE RESPONSE FORMAT

```
https://app.stockai.es/api/v1
```

If StockAI runs on your company's own server, replace `app.stockai.es` with its domain; everything else is the same. Every route in this guide hangs off `/api/v1`.

Every successful response is wrapped the same way. What you want is always inside `data`:

```
{
  "success": true,
  "data": { ... },
  "meta": { "timestamp": "2026-10-23T02:45:23.756880+00:00" }
}
```

An error response has no `data`: it carries `detail` (English text for people) and almost always `error_code` and `error_params`. Your code must decide on `error_code`, never on the text. Details in Limits and errors.

YOUR FIRST CALL, STEP BY STEP

1. Sign in to StockAI as an analyst or administrator and open Automation, "API Keys" tab.
2. Press "Generate key", type a name that says which system will use it (for example "Nightly ERP"), choose "Read only" and press "Create".
3. Copy the key with "Copy". It starts with `sk_live_` and is never shown again. Store it in your system's secret manager, never in code.
4. From a terminal, call GET `/planning` with the key in the `Authorization` header:

```
export STOCKAI_KEY="sk_live_..."   # from your secret manager, never from the repository


curl https://app.stockai.es/api/v1/planning \
  -H "Authorization: Bearer $STOCKAI_KEY"
```

The response tells you at what detail (`period`: day, week or month) and over how many periods (`horizon`) everything else is computed, and above all `active_session_id`: the run the app computes today's stock signal from.

```
{
  "success": true,
  "data": {
    "period": "daily",
    "horizon": 14,
    "available_periods": ["daily", "weekly"],
    "max_horizon": 90,
    "period_source": "auto",
    "period_reason": "natural_frequency",
    "requested_period": null,
    "active_session_id": "sess_cc9ab9137953"
  },
  "meta": { "timestamp": "2026-10-23T02:45:23.756880+00:00" }
}
```


> Ask for the active session every time
>
> `active_session_id` changes whenever a new run trains. Do not store it in your configuration: ask for it at the start of every run. If it is `null`, the account has no trained run yet and the stock signal has nothing to come from.

1. With that id you can read the stock signal: `GET /inventory/status?session_id=...` (the parameter is optional; without it the active session is used).
2. When the system needs to write (upload sales, log orders), create a second, "Read and write" key. See Keys and authentication.
3. Before touching real data, test against a sandbox.

TRYING IT WITHOUT WRITING CODE

The app's API screen shows your installation's base URL, has a field to paste your key and a "Run" button on each call that really runs it against your account. It is the way to see the real shape of a response before writing anything.

Keys and authentication

How to create, store, rotate and revoke `sk_live_` keys, the difference between read and write, and the headers every call authenticates with.

An API key is the credential of a system, not of a person. It does not belong to whoever created it: it keeps working if that person leaves the company and gains no permissions if they are promoted. Everything it writes is recorded under the key's name (`api_key:<id>`), not its creator's.

CREATING A KEY IN THE APP

1. Open Automation and go to the "API Keys" tab. You need to be an analyst or administrator.
2. Press "Generate key". An inline form appears.
3. In "Key name (e.g. 'ERP integration')" type the name of the system that will use it. It is what you will see in the list and in the usage report.
4. Choose the access: "Read only" or "Read and write". It defaults to "Read only": if your integration uploads files or logs orders, change it deliberately.
5. Press "Create". "Key generated — copy it now. It will not be shown again." appears at the top with the full key and a "Copy" button.
6. Press "Copy", paste it into your system's secret manager and close the notice with the ×.

> Shown once
>
> StockAI keeps only a fingerprint (SHA-256) of the key and its last 4 characters. Nobody, not even support, can show it to you again. If you lose it, create another and revoke the old one.

The key list

Name	The name you gave it when creating it.
Access	"Read" or "Read and write".
Created	The creation date.
Last used	The day of its last call, or "Never". Updated at most once a minute: it tells you whether a key is still in use before you revoke it.
Revoke	Deletes the key. It asks for confirmation: "Revoke this API key? Any apps using it will stop working."

With none yet, the tab says "No API keys yet.". Below the list is the "Developer sandbox" card: see Sandbox and versions.

READ OR WRITE

Access in the app	`scope`	Acts as	Can
Read only	`read`	Read-only user (`viewer`)	Everything that only reads: stock signal, stock, forecasts, orders, the feed for your ERP, sync health, MCP.

Access in the app	scope	Acts as	Can
Read and write	write	Analyst (analyst)	Also: upload files, train, edit stock and suppliers, log and receive orders, push stock, create webhooks.

No key can be an administrator. A read key that tries to write gets 403 with error_code: "api_key_scope_insufficient" and error_params: {"required_scope": "write", "key_scope": "read"}. Use the weakest key that does the job: a read key for a BI dashboard or an assistant, a write key only for the process that really writes.

> Keys limited to warehouses
>
> If whoever creates the key has access to only some warehouses, the key is born limited to those same warehouses: it never reaches further than its creator.

HOW THE KEY IS SENT

It goes in the Authorization header with the Bearer prefix. For BI tools that cannot set that header, X-API-Key is accepted too. If you send both, Authorization wins. Never put the key in the URL: proxies and browser history keep URLs.

```
# The usual way
curl https://app.stockai.es/api/v1/planning -H "Authorization: Bearer sk_live_..."


# For tools that cannot set Authorization (Power BI web connector, Excel Power Query, Looker)
curl https://app.stockai.es/api/v1/planning -H "X-API-Key: sk_live_..."
```

WHAT A KEY NEVER REACHES

A key reaches almost everything the app does. Some routes belong to a person and not to a system, and answer 403 api_key_route_not_exposed (the reason is in error_params.reason):

- Signing in, users, roles and managing keys themselves (a key cannot create, list or revoke keys).
- Personal preferences, team messages and conversations with the assistant.
- Exporting or deleting the account, installation configuration and the AI provider.
- Decisions that carry a person's name: approving orders, cancelling them or marking them paid, customer commitments, contracts, budgets, forecast adjustments and consensus.
- Configuring file drop (SFTP/S3) and creating a sandbox: an administrator does it on the screen.

```
HTTP/1.1 403 Forbidden
{"detail":"This endpoint cannot be called with an API key.",
 "error_code":"api_key_route_not_exposed",
 "error_params":{"reason":"internal tag 'users': user and password management belongs to people, not to a credential"}}
```

ROTATING A KEY WITHOUT DOWNTIME

1. Create a new key with the same access and a name that tells it apart (for example "Nightly ERP 2026-10").
2. Change it in your system's secret manager and deploy.
3. Wait until the old key's "Last used" stops moving and the new one shows today's date.
4. Revoke the old one with "Revoke".

Mind your plan's key ceiling (3 on Pro, 10 on Max): rotating needs a free slot for a few minutes.

REVOKING

Revoking is immediate and irreversible: the next call with that key gets `401 api_key_invalid`, exactly like a key that never existed (on purpose: whether it existed is not disclosed). The calls it made before still count in the month's usage.

```
HTTP/1.1 401 Unauthorized

{"detail":"API key is invalid or expired","error_code":"api_key_invalid","error_params":{}}
```

WHAT IS RECORDED

· Every write by a key is recorded in the account log with the key's name, the route and the outcome.

· What is refused at the door (`401`, scope or permission `403`, `429`) leaves no record and does not count as usage: if you write with a read key, you will see it on your side, not in the log.

· Every new key raises the "an API key was created" event, visible to administrators.

Limits, errors and retries

Each plan's per-minute and per-day ceilings, how usage is metered, the shape of errors, what to retry, and how to avoid duplicates with idempotency keys.

THE CEILINGS

Plan	Per minute per key	Per day per key	Keys
Free	—	0 (no API)	0
Pro	120	2,000	3
Max	120	20,000	10
Corporate	120	No ceiling	No ceiling
Trial and sandbox	120	200	1

- Ceilings are per key: two integrations with different keys never get in each other's way.
- The per-minute window is the last 60 seconds; the daily one, the last 24 hours.
- Past a ceiling you get 429 with `error_code: "rate_limited"` and the header `Retry-After: 60`. Wait that many seconds before retrying.
- The 120 per minute fit an integration's real work (a nightly push and polling its status). If you brush against them there is almost always a loop: filter on the server (`?signal=PEDIR_YA`) instead of fetching everything and discarding.

HOW USAGE IS METERED

Every call that passes all checks adds one to that key's day (UTC). Refused calls — invalid key, route not exposed, read key writing, plan without the API, ceiling reached — do not count. An administrator sees the month's usage by day and by key on the API screen; revoked keys still appear with what they used.

THE SHAPE OF AN ERROR

Errors carry no `data`. They carry `detail` (English text for people, whose wording can change) and a stable `error_code` with its `error_params`. Always decide on `error_code` or the HTTP status.

```
HTTP/1.1 422 Unprocessable Entity

{"detail":[{"type":"less_than_equal","loc":["query","limit"],

            "msg":"Input should be less than or equal to 500","input":"9999","ctx":{"le":500}}],

 "error_code":"validation_error"}
```

In validation errors (`422 validation_error`), `detail` is a list: each item says in `loc` which field failed and in `msg` why.

HTTP	error_code	What happened	What to do
401	`unauthenticated`	No credential was sent.	Add `Authorization: Bearer sk_live_....`
401	`api_key_invalid`	Unknown, revoked or expired key.	Do not retry: change the key.

HTTP	error_code	What happened	What to do
403	plan_feature_locked	The account's plan does not include the API (or MCP).	Do not retry: it needs another plan.
403	api_key_route_not_exposed	That route cannot be used with a key.	Do it in the app.
403	api_key_scope_insufficient	Read key on a route that writes.	Use a write key.
404	not_found	No such route, or a resource that does not exist in your account.	Check the route and the id.
405	method_not_allowed	Wrong method for that route.	Check GET/POST/PUT/PATCH/DELETE.
409	e.g. session_not_trainable, po_idempotency_key_reused	The state does not allow the operation, or an idempotency key was reused with other content.	Do not retry as is: read error_params.
422	validation_error or another code	The body or parameters are not valid.	Fix the request.
429	rate_limited	Per-minute or per-day ceiling.	Wait Retry-After seconds.
500	internal_error	Unexpected server failure.	Retry with growing waits.
503	server_busy	The server is saturated.	Retry with growing waits.

WHAT TO RETRY

· Yes: 429 (after Retry-After), 500, 503 and network drops.

· No: the other 4xx. They will not change by waiting; retrying them only spends your quota.

· A read can always be retried.

· A write is only safe to retry if the route is idempotent (below). If it is not and the connection dropped, check first whether it was applied.

```
import time, uuid, requests


def call(method, url, key, *, json=None, idempotency_key=None, tries=5):
    headers = {"Authorization": f"Bearer {key}"}
    if idempotency_key:
        headers["Idempotency-Key"] = idempotency_key      # same value on every retry
    for attempt in range(tries):
        r = requests.request(method, url, headers=headers, json=json, timeout=60)
```

```
        if r.status_code == 429:                          # rate limited
            time.sleep(int(r.headers.get("Retry-After", "60")))
            continue
        if r.status_code >= 500:                          # internal_error, server_busy
            time.sleep(2 ** attempt)
            continue
        return r
    r.raise_for_status()


# One order = one idempotency key, generated ONCE and reused on every retry.
key_for_this_order = str(uuid.uuid4())
```

IDEMPOTENCY: RETRYING WITHOUT DUPLICATING

A purchase order logged twice is stock "on its way" twice and a duplicate purchase. So the writes that create something accept a key that makes them safe to repeat:

Route	How	On repeat
`POST /inventory/log-po`	`Idempotency-Key` header (one UUID per order)	`200` with `replayed: true` and the original order. Same key with other lines: `409 po_idempotency_key_reused`.
`POST /inventory/po`	`Idempotency-Key` header	Same as `log-po`.
`POST /inventory-sync/profiles`, `.../refresh`, `.../profiles/{id}/run`, `.../profiles/apply`	`Idempotency-Key` header (up to 128 characters)	Returns the first result; nothing is created or run twice.
`POST /inventory-sync/profiles/{id}/ingest`	The batch's `batch_id` field	`replayed: true` and the same run. Same `batch_id` with other rows: `409 inventory_sync_batch_id_reused`.
`POST /purchase-orders/{id}/erp-reference`	Idempotent per (order, reference)	`changed: false`. Another reference for the same document: `409 erp_reference_conflict`.
`POST /inventory/po/import`	Each order in the file carries its own key	Importing the same file again does not duplicate orders.

```
curl -X POST "https://app.stockai.es/api/v1/inventory/log-po?session_id=$SESSION" \
  -H "Authorization: Bearer $STOCKAI_KEY" \
  -H "Content-Type: application/json" \
  -H "Idempotency-Key: 6f1c2a0e-1b7d-4c55-9a51-3f0f4e0b8d21" \
  -d '{"items":[{"sku":"SKU-001","recommended_qty":120,"final_qty":100,
```

```
                  "status":"modified","unit_cost":2.5,"supplier":"Distribuidora Andina"}]}'


# First call:  201, "replayed": false  -> the order was created

# Same call again (same key, same lines): 200, "replayed": true -> the FIRST order, nothing new

# Same key, different lines: 409 po_idempotency_key_reused
```

> Generate the key once per operation
>
> The idempotency key is generated before the first attempt and reused on every retry of that same order. Generate a new one on each attempt and each attempt is a new order.

Sandbox and versions

A separate environment with demo data to build your integration without touching your real data, and the versioning policy with its Deprecation and Sunset headers.

THE SANDBOX

A sandbox is a throwaway account, separate from yours, with the demo sales history already loaded and a write key already issued. You build and test against it with the same URL and the same routes as production; when it works, you swap the key.

Who creates it	An account administrator, from the "Developer sandbox" card under Automation → "API Keys". An API key cannot create sandboxes.
How long it lasts	7 days. Then it is erased automatically, with its data and its key. It can be erased sooner with "Delete".
How many	Up to 2 live at once per company (`409 sandbox_limit_reached` if you ask for a third). A trial account cannot create sandboxes.
Its limits	A trial account's: 30 SKUs, 1 key, 120 calls per minute and 200 per day.
Isolation	The sandbox key cannot reach your real account, and your real keys cannot reach the sandbox: every call is scoped to its key's account.
No way out	The sandbox cannot send email or WhatsApp to anyone.

1. As an administrator, open Automation, "API Keys" tab, and scroll to "Developer sandbox".
2. Press "Create sandbox". "Sandbox created" appears with two items: "Sandbox API key:" and "Login to see in the app what your calls did:" (an email and a password).
3. Copy the key: "Shown once: copy it now.".
4. To see in the app what your calls did, sign in with that login in another private window.
5. When you are done, press "Delete" on its row and confirm "Delete this sandbox?". Your real data is not touched.

```
# 1. An administrator presses "Create sandbox" (Automation > API Keys).
#    The card shows the sandbox key ONCE, plus a login to look at it in the app.
export STOCKAI_KEY="sk_live_..."      # the SANDBOX key

# 2. Build against it exactly as against production: same URL, same routes.
curl https://app.stockai.es/api/v1/planning -H "Authorization: Bearer $STOCKAI_KEY"

# 3. When it works, swap the key for a production one. Nothing else changes.
```

> The sandbox has the demo history, not yours. To test with your data, upload it there through the API. If "The demo data could not be loaded; the sandbox is empty." appears when you create it, the account exists and the key works, but you will have to load data yourself.

VERSIONING POLICY

Every route lives under `/api/v1`. Within a version some changes can happen at any time and some never do:

May arrive without notice	A new endpoint, a new field in a response, a new optional parameter, a new `error_code` for a new situation. Write your client to ignore fields it does not know.
Never within `v1`	Removing or renaming an endpoint, a field or a parameter; changing a field's type or meaning; making an optional field required; changing an existing `error_code`.
A breaking change	Ships as a new version (`/api/v2`). The previous one keeps working for at least 12 months after the announcement.
Retiring a single endpoint	With at least 180 days of notice. It keeps working until the sunset date.

THE DEPRECATION AND SUNSET HEADERS

From the day an endpoint's retirement is announced, every response from it carries these headers, so your system learns about it from the call itself:

```
HTTP/1.1 200 OK

Deprecation: @1798761600

Sunset: Tue, 29 Jun 2027 00:00:00 GMT

Link: </v2/alerts>; rel="successor-version", <https://app.stockai.es/desarrolladores#versionado>; rel="
deprecation"
```

`Deprecation`	When it was announced, as `@` + Unix seconds (RFC 9745).
`Sunset`	The HTTP date after which the endpoint may disappear (RFC 8594).
`Link` **with** `rel="successor-version"`	The route that replaces it, when there is one.
`Link` **with** `rel="deprecation"`	This policy's page.

Today no endpoint is being retired, so you will not see these headers. Log response headers, or alert when `Sunset` appears, to find out in time the day one arrives.

> The webhooks' version
>
> Webhook events carry their own `api_version` (today `2026-10-05`) in every delivery's envelope. A change that breaks an event's shape changes that date. See Webhooks.

Catalogue and inventory over the API

The endpoints to read and write stock, suppliers, warehouses, counts and transfers, and to read the stock signal and the day's work.

All of these routes are under `/inventory`. Reads work with a read key; writes need a write key. If the key is limited to some warehouses, it only sees and touches those.

STOCK PER SKU

Method and route	What it does	Key
`GET /inventory/stock/page`	Paged stock list. Parameters: `limit`, `offset`, `q` (search), `warehouse`.	read
`GET /inventory/stock`	All stock at once (unpaged).	read
`GET /inventory/stock/lookup`	Looks up stock records.	read
`GET /inventory/stock/{sku}`	One record.	read
`GET /inventory/stock/{sku}/history`	A SKU's stock history.	read
`PUT /inventory/stock/{sku}`	Creates or replaces the record. `current_stock` is required.	write
`PATCH /inventory/stock/{sku}`	Changes some fields of a record that already exists. Never creates one.	write
`DELETE /inventory/stock/{sku}`	Deletes the stock record.	write
`PATCH /inventory/stock/{sku}/product-type`	Changes the product type (finished good, component...).	write
`GET / PUT / DELETE /inventory/stock/{sku}/suppliers[/{supplier_id}]`	The suppliers linked to a SKU.	read / write

```
curl "https://app.stockai.es/api/v1/inventory/stock/page?limit=50&offset=0&warehouse=principal&q=SKU-0"
 \
  -H "Authorization: Bearer $STOCKAI_KEY"
```

```
# Create or replace a SKU's record (current_stock is required)
curl -X PUT https://app.stockai.es/api/v1/inventory/stock/SKU-001 \
  -H "Authorization: Bearer $STOCKAI_KEY" -H "Content-Type: application/json" \
  -d '{"current_stock":120,"min_stock":20,"lead_time_days":7,"unit_cost":2.5,
       "moq":12,"supplier":"Distribuidora Andina","warehouse":"principal"}'

# Change one field of a record that already exists (never creates one)
curl -X PATCH https://app.stockai.es/api/v1/inventory/stock/SKU-001 \
```

```
  -H "Authorization: Bearer $STOCKAI_KEY" -H "Content-Type: application/json" \
  -d '{"current_stock":118}'
```

Fields PUT/PATCH accept: `display_name`, `current_stock`, `min_stock`, `lead_time_days`, `unit_cost`, `moq`, `supplier`, `notes`, `sale_price`, `category`, `family`, `brand`, `unit_of_measure`, `barcode`, `warehouse`. The response is the full record:

```
{
  "sku": "SKU-001", "display_name": "SKU-001", "warehouse": "principal",
  "current_stock": 120.0, "min_stock": 0.0, "lead_time_days": 7,
  "unit_cost": 2.5, "moq": 12.0, "supplier": "Distribuidora Andina",
  "product_type": "finished_good", "service_level": 0.95,
  "lead_time_set_by": "user", "unit_cost_set_by": "user", "moq_set_by": "user",
  "updated_at": "2026-10-01T08:00:00+00:00"
}
```

The `*_set_by` fields say who set each value (`user`, `file`, `supplier_rule`...). What you write through the API counts as your own data.

> If you sync stock, do not overwrite it
>
> If a sync profile owns the `current_stock` field, that profile's next run replaces what you wrote by hand. To keep stock current from your system, use sync instead of one-off PUTs.

Importing stock from a file

```
# 1. Preview: what was detected and what would be written. Writes nothing.
curl -X POST https://app.stockai.es/api/v1/inventory/bulk/preview \
  -H "Authorization: Bearer $STOCKAI_KEY" -F "file=@stock.csv"

# 2. Import. Optional fields: mapping (JSON text), warehouse, thousands_dot, only_fill_missing
curl -X POST https://app.stockai.es/api/v1/inventory/bulk \
  -H "Authorization: Bearer $STOCKAI_KEY" -F "file=@stock.csv" -F "warehouse=principal"
```

`/inventory/bulk/preview` touches no row: it tells you which columns it detected (`detected_mapping`), which it did not use and what it would write. If a sync profile owns any of those fields, it warns in `synced_overwrites`. `GET /inventory/template.csv` downloads the template with the recognised headers.

THE STOCK SIGNAL AND THE DAY'S WORK

`GET /inventory/status`	The stock signal per SKU: signal, coverage, reorder point and recommended quantity. Optional parameters: `session_id` (without it, the active session), `signal`, `supplier`, `abc`, `by_warehouse`, `q`, `skus`, `without_forecast`, `service_level`, `sort`, `order`, `limit`, `offset`.
`GET /inventory/morning-briefing`	The day's work: risks, recommendations with their reason, demand changes and KPIs. Parameters: `session_id`, `service_level`.

`GET /inventory/dashboard-summary`	The dashboard's figures.
`GET /inventory/optimize`	Purchases and transfers suggested by the optimizer, per SKU and warehouse (`session_id`, `horizon_days`).
`GET /inventory/setup-gaps`	SKUs missing setup (cost, lead time...).
`GET /inventory/dead-capital`, `/margin-erosion`, `/supplier-cost-inflation`, `/forecast-money`	Tied-up capital, eroding margin, cost inflation and projected revenue, cost and margin.

```
curl "https://app.stockai.es/api/v1/inventory/status?signal=PEDIR_YA&supplier=Andina" \
  -H "Authorization: Bearer $STOCKAI_KEY"
```

```
{
  "period": "daily", "coverage_unit": "day",
  "items": [{
    "sku": "SKU-002", "signal": "PEDIR_YA",
    "current_stock": 42.0, "reorder_point": 5919.28, "recommended_qty": 5878.0,
    "coverage_days": 0.1,
    "lead_time_days": 7, "lead_time_source": "user",
    "unit_cost": 5.2,    "unit_cost_source": "user",
    "moq": 25.0,         "moq_source": "user",
    "supplier": "Granos del Valle",
    "explanation_code": "inventory_explain_reorder",
    "explanation_params": { "signal": "PEDIR_YA", "daily_demand": 757.97, "coverage_days": 0.1,
                            "current_stock": 42.0, "reorder_point": 5919.28,
                            "lead_time_days": 7, "lead_time_source": "user" },
    ...
  }]
}
```

`signal`	**Meaning**
`PEDIR_YA`	Order now: stock does not cover the lead time.
`PEDIR_PRONTO`	Order soon.
`OK`	Covered.
`SOBRESTOCK`	More than needed.
`SIN_DATOS`	No stock on record: unknown, which is not the same as "fine".

The `lead_time_source`, `unit_cost_source` and `moq_source` fields say where each assumption came from: `user` (you typed it), `file` (it came in your file), `supplier_rule` (a supplier rule),

`learned` (learned from your receptions; lead time only) or `default` (StockAI assumed it). Handle all five. The reason behind each recommendation comes structured in `explanation_code` + `explanation_params`: decide on that, not on the `explanation` text.

SUPPLIERS

Method and route	What it does
`GET /inventory/suppliers`, `GET /inventory/suppliers/page`	List (whole, or paged with `limit`, `offset`, `q`).
`POST /inventory/suppliers`	Creates a supplier. Only `name` is required.
`PATCH /inventory/suppliers/{id}`	Changes its details.
`DELETE /inventory/suppliers/{id}` / `POST .../{id}/reactivate`	Deactivates / reactivates it (it is not deleted).
`POST /inventory/suppliers/import/preview`, `POST /inventory/suppliers/import`	Import from a file (template at `GET /inventory/suppliers/import/template`).
`GET /inventory/suppliers/scorecard`, `/lead-time-alerts`, `/contact-health`	Performance, suppliers taking longer than usual, and missing contact details.
`POST /inventory/suppliers/{id}/price-breaks`, `GET /inventory/price-breaks`	Volume discounts.

```
curl -X POST https://app.stockai.es/api/v1/inventory/suppliers \
  -H "Authorization: Bearer $STOCKAI_KEY" -H "Content-Type: application/json" \
  -d '{"name":"Distribuidora Andina","email":"ventas@andina.example",
       "lead_time_days":7,"payment_terms":"30 dias","payment_terms_days":30,
       "erp_code":"PRV-0042"}'
```

Fields: `name`, `email`, `phone`, `whatsapp`, `lead_time_days`, `lead_time_std`, `review_period_days`, `payment_terms`, `payment_terms_days`, `notes` and `erp_code`. The `erp_code` is the supplier's code in your ERP: it is what the order feed uses to match documents.

WAREHOUSES

· `GET /inventory/warehouses` lists warehouses (`id`, `name`, `is_default`...). `POST` creates one and `PATCH /inventory/warehouses/{name}` changes it. The number of warehouses has a per-plan ceiling.

· `GET` / `PUT` / `DELETE /inventory/warehouses/lanes`: transfer lanes between warehouses.

PHYSICAL COUNTS

```
# Open a count for one warehouse
curl -X POST https://app.stockai.es/api/v1/inventory/stock-counts \
  -H "Authorization: Bearer $STOCKAI_KEY" -H "Content-Type: application/json" \
  -d '{"warehouse":"principal","notes":"Monthly count"}'

# Record what was counted, line by line
curl -X PUT https://app.stockai.es/api/v1/inventory/stock-counts/$COUNT_ID/lines \
```

```
  -H "Authorization: Bearer $STOCKAI_KEY" -H "Content-Type: application/json" \
  -d '{"sku":"SKU-001","quantity":117,"mode":"set"}'
# mode "add" (default) accumulates, e.g. one scan = one unit; "set" replaces the counted total.
# client_ref (optional): an id per scan, so a retried request is ignored.


# See the differences, then apply them to the stock
curl https://app.stockai.es/api/v1/inventory/stock-counts/$COUNT_ID/preview -H "Authorization: Bearer $STOCKAI_KEY"
curl -X POST https://app.stockai.es/api/v1/inventory/stock-counts/$COUNT_ID/apply -H "Authorization: Bearer $STOCKAI_KEY"
```

A count is opened (POST), its lines filled (PUT `.../lines`, DELETE `.../lines/{sku}`), reviewed (GET `.../preview`) and applied (POST `.../apply`) or closed / cancelled (`.../close`, `.../cancel`). Applying sets the stock to what was counted.

TRANSFERS BETWEEN WAREHOUSES

```
curl -X POST https://app.stockai.es/api/v1/inventory/transfers \
  -H "Authorization: Bearer $STOCKAI_KEY" -H "Content-Type: application/json" \
  -d '{"from_warehouse":"principal","to_warehouse":"norte",
       "items":[{"sku":"SKU-001","qty":10}],"notes":"Weekly rebalancing"}'
```

Then: POST `/inventory/transfers/{id}/receive` when it arrives, `.../close` to close it and `.../cancel` to void it. GET `/inventory/transfers` lists them.

OTHER INVENTORY RESOURCES

Demand events	`/inventory/events` and its catalogue: seasons and dates that move demand, with their multipliers.
Bills of materials	`/inventory/bom/{parent_sku}`: an assembled product's components; GET `/inventory/production-requirements` explodes demand into components.
Shrinkage	GET / POST `/inventory/shrinkage` and its reasons.
Money	`/inventory/cash-calendar`, `/inventory/roi`, `/inventory/roi/monthly`.
Report	GET `/inventory/report/pdf` downloads the inventory report as a PDF.

Forecasts and sessions over the API

How to upload sales, train and wait for the result, and read a session's forecasts, accuracy and results.

A session is one forecast run: some sales, a configuration and the result of training it. The app works with the active session, the one `GET /planning` returns in `active_session_id`. Sessions are never deleted: `DELETE /sessions/{id}` archives them and `POST /sessions/{id}/restore` brings them back.

THE COMPLETE NIGHTLY CYCLE

This is the work most integrations need: replace the sales file, retrain and wait.

```
#!/usr/bin/env bash
set -euo pipefail
API=https://app.stockai.es/api/v1
AUTH="Authorization: Bearer $STOCKAI_KEY"

# 1. Replace the sales file in place (same source id, same column mapping)
curl -sf -X POST "$API/data-sources/$SOURCE_ID/file" -H "$AUTH" -F "file=@/exports/sales.csv"

# 2. Which session is active right now (ask every time, never hard-code it)
SESSION=$(curl -sf "$API/planning" -H "$AUTH" | jq -r '.data.active_session_id')

# 3. Retrain (skip this if the session has a schedule: it retrains when the file changes)
curl -sf -X POST "$API/sessions/$SESSION/train" -H "$AUTH" \
     -H "Content-Type: application/json" -d '{}'

# 4. Wait while it is QUEUED or RUNNING. Watching only RUNNING exits on the first pass.
while :; do
  ST=$(curl -sf "$API/sessions/$SESSION/train/status" -H "$AUTH" | jq -r '.data.status')
  case "$ST" in QUEUED|RUNNING) sleep 10 ;; *) break ;; esac
done
echo "Training finished: $ST"
```

1. Look up your sales source's `id` once with `GET /data-sources` (or `GET /datasets`) and keep it in your configuration: that id does not change.
2. Every night replace the file with `POST /data-sources/{id}/file` (multipart, field `file`). The source keeps its id and its column mapping. It accepts `.csv`, `.xlsx`, `.xls`, `.parquet` and `.json`.
3. Ask for the active session with `GET /planning`.
4. If the session has a schedule, StockAI retrains on its own when the file changes and you can skip this step. Otherwise queue training with `POST /sessions/{id}/train`.
5. Poll `GET /sessions/{id}/train/status` every few seconds while it says `QUEUED` or `RUNNING`. It ends in `COMPLETED` or `FAILED`.

```
{
  "session_id": "sess_cc9ab9137953",
  "status": "RUNNING",
  "job_id": "job_fe6d1a76b4f2",
  "job": {
    "status": "RUNNING",
    "created_by": "usr_97c71ad04a86",
    "progress": { "step": "ml_training", "message": "Training ML models", "percent": 27 },
    "error": null
  }
}
```


> Queue training on a session that is not in a trainable state (one already running, for example) and you get `409 session_not_trainable`. Trainings per day also have a per-plan ceiling (10 on Full).

DATA SOURCES AND DATASETS

Method and route	What it does	Key
`GET /data-sources`	Lists your sources (files and SQL databases).	read
`POST /data-sources/file`	Creates a new source from a file.	write
`POST /data-sources/{id}/file`	Replaces a source's file, keeping its id and mapping. The previous file is not deleted: it is kept aside.	write
`GET /data-sources/{id}/preview`, `/analyze`	Preview and analysis of the source.	read
`POST /data-sources/sql`, `.../execute-query`, `.../materialize`	SQL sources: create, query and save the result as a dataset.	write
`DELETE /data-sources/{id}`	Deletes a source. Refused with `data_source_in_use` if any session (even archived) uses it.	write
`GET /datasets`, `POST /datasets`, `GET /datasets/{id}`	Training datasets.	read / write

SESSIONS AND CONFIGURATION

Method and route	What it does
`GET /sessions`, `GET /sessions/summary`, `GET /sessions/{id}`	List and read sessions.
`POST /sessions`	Creates a draft session (`name` required; `description`, `tags`).

Method and route	What it does
`POST /sessions/{id}/dataset`, `POST /sessions/{id}/upload`	Attaches an existing dataset or uploads a new one.
`/sessions/{id}/configure/columns`, `/features`, `/models`, `/validation`	The training wizard's steps (GET to read, POST to save).
`GET /sessions/{id}/data-gate`, `POST .../configure/remediations`	The data-quality gate and your answers to it.
`POST /sessions/{id}/train`	Queues training (optional: `user_horizon_days`, `user_granularity`).
`POST /sessions/{id}/reforecast`	Creates a NEW session that forecasts with the stored models over newer sales, without retraining.
`POST /sessions/{id}/backtest`	Starts a backtest. Backtest sessions never drive planning.
`GET /jobs/active`, `GET /jobs/{id}`, `GET /jobs/{id}/logs`, `DELETE /jobs/{id}`	Queued jobs: see them, read their log and cancel them.

Retraining on a schedule

```
curl -X POST https://app.stockai.es/api/v1/sessions/$SESSION/schedule \
  -H "Authorization: Bearer $STOCKAI_KEY" -H "Content-Type: application/json" \
  -d '{"cron_expr":"0 6 * * 1","enabled":true}'
```

`cron_expr` is a cron expression (in the example: Mondays at 6:00). `GET /schedules` lists them all, `GET /schedules/history` their runs, and `DELETE /sessions/{id}/schedule` removes the schedule. It is the same as the "Schedules" tab under Automation.

READING THE FORECAST

Route (`GET`)	What it returns
`/sessions/{id}/forecast-series/{sku}`	A SKU's history and forecast with its quantiles (`p10`, `p50`, `p90`...). Optional: `model`.
`/sessions/{id}/forecast-total`	The whole catalogue summed as one series (`granularity`).
`/sessions/{id}/results`	Forecasts and per-model results (`level`).
`/sessions/{id}/accuracy`	Accuracy against the baseline models, per SKU and overall (`threshold`).
`/sessions/{id}/metrics`, `/routing`, `/warnings`	Metrics, which model was chosen for each SKU, and the run's warnings.
`/sessions/{id}/sku-intelligence/{sku}`, `/decomposition/{sku}`	A SKU's card and its decomposition (trend, seasonality).
`/sessions/{id}/forecast-vs-actual`	What was forecast against what sold.

Route (GET)	What it returns
/sessions/{id}/reports/{format}	Downloads a report (first POST .../reports/generate and GET .../reports/status).

```
curl "https://app.stockai.es/api/v1/sessions/$SESSION/forecast-series/SKU-001" \
  -H "Authorization: Bearer $STOCKAI_KEY"


# "data": {
#   "sku": "SKU-001", "model": "ets", "available_models": ["ets"],
#   "historical": [{ "date": "2024-01-01", "value": 25.0 }, ...],
#   "forecast":   [{ "date": "2025-04-01", "value": 40.67,
#                    "p10": 35.53, "p50": 40.67, "p90": 45.81,
#                    "lower": 34.07, "upper": 47.26 }, ...]
# }
```

DATASETS FOR BI

For Power BI, Excel or Looker there are flat tables meant to be read whole: /datasets/forecast-points, /datasets/inventory-status, /datasets/accuracy, /datasets/purchase-order-lines, /datasets/receptions and /datasets/committed-demand; /datasets/schema describes their columns. They accept format, page, limit and session_id. Since many BI tools cannot set Authorization, use X-API-Key.

```
curl "https://app.stockai.es/api/v1/datasets/forecast-points?format=csv&page=1" \
  -H "X-API-Key: $STOCKAI_KEY" -o forecast-points.csv
```

Orders and your ERP over the API

Logging and receiving purchase orders, and taking approved orders out to your ERP with a cursor, in your ERP's format, writing the document number back.

LOGGING THE ORDER THAT WENT OUT

`POST /inventory/log-po?session_id=...` logs an order built from the recommendations. Without it the order does not exist for StockAI: its reception is not expected and your suppliers' real lead time is never learned. Send what the buyer decided per line, rejected ones included:

```
curl -X POST "https://app.stockai.es/api/v1/inventory/log-po?session_id=$SESSION" \
  -H "Authorization: Bearer $STOCKAI_KEY" \
  -H "Content-Type: application/json" \
  -H "Idempotency-Key: 6f1c2a0e-1b7d-4c55-9a51-3f0f4e0b8d21" \
  -d '{"items":[{"sku":"SKU-001","recommended_qty":120,"final_qty":100,
                "status":"modified","unit_cost":2.5,"supplier":"Distribuidora Andina"}]}'


# First call:  201, "replayed": false  -> the order was created
# Same call again (same key, same lines): 200, "replayed": true -> the FIRST order, nothing new
# Same key, different lines: 409 po_idempotency_key_reused
```

`items[].status`	`approved` (as is), `modified` (quantity changed) or `rejected` (not ordered). It is the measure of how much StockAI is followed.
`items[].recommended_qty` / `final_qty`	What StockAI recommended and what was ordered.
`items[].unit_cost`, `supplier`, `supplier_id`, `warehouse`, `currency`	Optional per line.
`destination_warehouse`	Which warehouse it arrives at. If your key is limited to warehouses, it must be one of them.
`cost_center_id`	Cost centre it is charged to (optional).
No `items`	Every `PEDIR_YA` / `PEDIR_PRONTO` SKU of the session is logged, but with no per-line decisions (it does not count for adoption).

```
{
  "id": "fc92e89e-b1c7-4eab-807f-97d173565d19",
  "po_number": 1,
  "session_id": "sess_b70dd9d55a81",
  "sku_count": 1, "total_units": 100.0, "total_value": 250.0,
  "suggested_count": 1, "approved_count": 1, "modified_count": 1, "rejected_count": 0,
  "reception_status": "pending",
  "destination_warehouse": null,
  "source": "forecast",
```

```
  "replayed": false
}
```

> Budgets
>
> If the account has purchasing budgets, an order that exceeds them carries `budget_warnings` (soft cap) or is refused (hard cap). Lifting a hard cap is an administrator's decision in the app; a key cannot.

A hand-written order

```
curl -X POST https://app.stockai.es/api/v1/inventory/po \
  -H "Authorization: Bearer $STOCKAI_KEY" -H "Content-Type: application/json" \
  -H "Idempotency-Key: 0b9a7d4e-2f61-4f0e-9a7b-6c8f1d2e3a45" \
  -d '{"supplier_id":"de7514c0-44b6-41c5-90d6-877801d45fc5",
       "lines":[{"sku":"SKU-004","qty":60,"unit_cost":3.1}],
       "destination_warehouse":"principal"}'
```

`POST /inventory/po` creates an order with no session behind it (`source: "manual"`): `supplier_id` and `lines` (`sku`, `qty`, optional `unit_cost`) are required. It accepts the same `Idempotency-Key`. Unknown supplier: `404 supplier_not_found`.

Importing orders from a file

`POST /inventory/po/import/preview` and `POST /inventory/po/import` (multipart `file`, optional `mapping`) create one order per (reference, supplier, warehouse) in the file. Importing the same file twice does not duplicate. Template: `GET /inventory/po/import/template`.

AN ORDER'S LIFECYCLE

Method and route	What it does	Key
`GET /inventory/po-history/page`	Paged history (`limit`, `offset`, `status`, `q`).	read
`GET /inventory/po/{id}/items`	An order's lines.	read
`POST /inventory/po/{id}/send`	Sends the PDF to each supplier by email and WhatsApp. Those without contact details are skipped and reported. Needs an account administrator with a verified email.	write
`POST /inventory/po/{id}/receive`	Records arrival, full or partial. Adds to stock and learns the real lead time.	write
`POST /inventory/po/{id}/unreceive`, `.../unsend`	Undoes a reception or a send mark.	write
`GET /inventory/po/overdue`	Orders whose expected arrival has passed with no reception.	read

Method and route	What it does	Key
GET /inventory/status/export-po	The suggested order as CSV (session_id, signals, warehouse).	read

```
# Partial reception: 60 of the 100 units arrived. received_at is optional (default: now)
# and cannot be earlier than the order date (422 reception_date_before_order).
curl -X POST https://app.stockai.es/api/v1/inventory/po/$PO_ID/receive \
  -H "Authorization: Bearer $STOCKAI_KEY" -H "Content-Type: application/json" \
  -d '{"lines":[{"sku":"SKU-001","received_qty":60}]}'

# "data": { "po_log_id": "fc92e89e-...", "reception_status": "partial",
#           "received_at": "2026-10-23T03:00:31.257904+00:00", "lead_time_days": 0.0,
#           "items": [{ "sku": "SKU-001", "final_qty": 100.0, "received_qty": 60.0, ... }] }
```

> Approving, rejecting, cancelling, reopening and marking an order paid cannot be done with a key: they are decisions with a person's name on them and are made under Orders.

THE APPROVED-ORDER FEED FOR YOUR ERP

GET `/purchase-orders/export` returns the approved orders that changed since you last read, oldest first, with a cursor to resume from. It is a pure read: it works with a read key and marks nothing.

```
curl "https://app.stockai.es/api/v1/purchase-orders/export?limit=100" \
  -H "Authorization: Bearer $STOCKAI_KEY"
```

```
{
  "orders": [{
    "id": "fc92e89e-b1c7-4eab-807f-97d173565d19",
    "number": "OC-000001",
    "state": "open",                      // open | partially_received | received | cancelled
    "cancelled_at": null, "cancel_reason": null,
    "created_at": "2026-10-22T20:59:16.750335-06:00",
    "documents": [{                       // one per supplier
      "document_id": "fc92e89e-b1c7-4eab-807f-97d173565d19:-",   // stable on every export
      "number": "OC-000001",
      "supplier": { "id": null, "name": "Distribuidora Andina",
                    "erp_code": null, "mapped": false },          // no erp_code yet: flagged
      "currency": null, "mixed_currency": false,
      "order_date": "2026-10-22",
      "expected_date": "2026-11-06", "expected_date_source": "model",
      "warehouse": "principal",
```

```
      "erp_reference": null, "acknowledged": false,
      "lines": [{ "line_id": "d3afc717-a782-4298-9375-b7033d9722be", "sku": "SKU-001",
                  "name": null, "quantity": 100.0, "received_quantity": 0.0,
                  "unit_cost": 2.5, "currency": null, "total": 250.0 }]
    }]
  }],
  "next_cursor": "po_10",
  "has_more": false,
  "held_back": 0
}
```

`since`	The previous page's `next_cursor` (shaped `po_<number>`). Without it you start from the beginning. A cursor this feed did not issue is refused with `400 feed_cursor_invalid`.
`limit`	Orders per page: 100 by default, 500 at most.
`has_more`	`true` if there is another page: fetch it right away with the new cursor.
`held_back`	Orders that changed but are still awaiting approval. They are not served until approved; once approved they come back on their own.
`state`	`open`, `partially_received`, `received` or `cancelled`. A cancelled order stays in the feed with that state: your ERP must void its own.
`documents[]`	One document per supplier. `document_id` and `line_id` are the same on every export: use them so the purchase is never created twice.
`supplier.mapped`	`false` if the supplier has no `erp_code`: the document is served anyway, flagged, so it is not lost.
`expected_date_source`	Where the expected date comes from: the learned lead time, or a date the supplier promised and a person accepted.

```
CURSOR=$(cat .stockai_cursor 2>/dev/null || true)
while :; do
  PAGE=$(curl -sf "$API/purchase-orders/export?limit=100${CURSOR:+&since=$CURSOR}" -H "$AUTH")
  echo "$PAGE" | jq -c '.data.orders[]' | while read -r ORDER; do
    import_into_erp "$ORDER"            # your code; match on documents[].document_id
  done
  CURSOR=$(echo "$PAGE" | jq -r '.data.next_cursor // empty')
  [ -n "$CURSOR" ] && echo "$CURSOR" > .stockai_cursor     # save AFTER importing
  [ "$(echo "$PAGE" | jq -r '.data.has_more')" = "true" ] || break
done
```

1. Read a page with the cursor you saved (none the first time).
2. Import each order into your ERP, matching on `document_id`.
3. Save `next_cursor` after importing, not before: if your process dies halfway, it re-reads what it did not finish.

4. If `has_more` is `true`, repeat; otherwise wait for the next run.
5. Write back the number your ERP gave each document (below).

> A newly approved order takes about 10 seconds to appear in the feed. That is deliberate: it stops a cursor from skipping an order whose transaction has not finished yet.

The file in your ERP's format

`GET /purchase-orders/export/file?po_ids=<id1>,<id2>&format=<key>` returns the chosen orders as the file your ERP imports, one document per supplier. Cancelled orders and orders awaiting approval are refused (`409 export_order_cancelled`, `409 po_approval_required`). `GET /purchase-orders/export/formats` lists the formats:

format	Format	Extension	Tested against a real system
csv	Generic CSV	.csv	Yes
xlsx	Generic Excel	.xlsx	Yes
sap	SAP (BAPI_PO_CREATE1 layout)	.txt	No — missing COMP_CODE, PURCH_ORG, PUR_GROUP, PLANT
dynamics_bc	Dynamics 365 / Business Central	.csv	No
netsuite	NetSuite CSV import	.csv	No
odoo	Odoo	.csv	No
oracle_ebs	Oracle E-Business Suite (open interface)	.csv	No — missing SHIP_TO_ORGANIZATION_CODE

```
curl "https://app.stockai.es/api/v1/purchase-orders/export/file?po_ids=$PO_ID&format=sap" \
  -H "Authorization: Bearer $STOCKAI_KEY" -o purchase_orders_sap.txt
```

> The formats marked "No" (`verified: false`) follow each ERP's documented layout but have not been imported into a real installation. StockAI does not know the fields in `unmapped_fields`: fill them in your ERP or your process before importing. Try it in your ERP's test environment first.

Writing the ERP's document number back

```
curl -X POST https://app.stockai.es/api/v1/purchase-orders/$PO_ID/erp-reference \
  -H "Authorization: Bearer $STOCKAI_KEY" -H "Content-Type: application/json" \
  -d '{"reference":"4500012345"}'
# Several suppliers on the order? Say which document: {"reference":"...","supplier_id":"de7514c0-..."}

# "data": { "changed": true, "po_log_id": "fc92e89e-...", "reference": "4500012345",
#           "document_id": "fc92e89e-...:-", "number": "OC-000001" }
# The same call again: "changed": false. A different number for the same document: 409.
```

· Stores the number your ERP gave the document. It is idempotent: repeating it with the same number answers `changed: false`.

· If the order has documents for several suppliers, send `supplier_id`; otherwise `400 erp_reference_supplier_required` lists the suppliers.

· A different number for a document that already has one: `409 erp_reference_conflict`. A number another order already uses: `409 erp_reference_in_use`. It is never overwritten.

· Any change to an order puts it back in the feed, writing its reference included: you will see it again with `acknowledged: true` and `erp_reference` filled in. Your importer must skip documents it already has (by `document_id`).

· `GET /purchase-orders/unacknowledged` lists open, approved orders with documents your ERP has not confirmed yet: your to-do list.

Stock sync and files over the API

Keeping stock current from your system: sync profiles, idempotent batch push, their status and the sync overview, and file drop over SFTP or S3.

There are three ways for StockAI's stock to follow your system's without anybody loading it by hand. All three go through the same engine: your column mapping, validation of every row, a safety brake that stops a suspicious change, and a log of every run.

Way	Who moves the data	Set up
Reading your database	StockAI queries your database (SQL or MongoDB) on an interval.	Under Inventory sync or through the API.
Push	Your system sends the rows to StockAI.	Through the API (this page) or on the screen.
File drop	Your system leaves a file on an SFTP server or an S3 bucket and StockAI picks it up.	Only on the screen, by an administrator.

PUSHING STOCK FROM YOUR SYSTEM

If you cannot open your database to StockAI, your system sends the rows. First you create a push profile that says which column is which; then you send batches.

1. Create the profile with `POST /inventory-sync/profiles` and `source_kind: "push"`. In `mapping`, tell each StockAI field which column of your rows it comes from. `sku` and `current_stock` are required. It is created off (`enabled: false`).
2. Do a dry run: send a batch with `dry_run: true`. It writes nothing and tells you what it would create, update and which rows it would reject.
3. Turn the profile on with `POST /inventory-sync/profiles/{id}/enable`. It is refused with `inventory_sync_dry_run_required` if there was no dry run since the last configuration change.
4. Send the real batches, each with its own `batch_id`.
5. Watch the state with `GET /inventory-sync/overview` or `GET /inventory-sync/health`.

```
curl -X POST https://app.stockai.es/api/v1/inventory-sync/profiles \
  -H "Authorization: Bearer $STOCKAI_KEY" -H "Content-Type: application/json" \
  -H "Idempotency-Key: erp-push-profile-1" \
  -d '{"name":"ERP push","source_kind":"push","default_warehouse":"principal",
       "mapping":{"sku":{"column":"item_code"},
                  "current_stock":{"column":"on_hand"},
                  "warehouse":{"column":"site"}}}'

# 201 -> "data": { "id": "isp_d194eddb57d3", "source_kind": "push", "enabled": false,
#                  "mode": "full", "missing_policy": "ignore", "negative_policy": "reject",
#                  "duplicate_policy": "reject", "brake_max_vanished_pct": 20.0, ... }
```

StockAI fields you can map: `sku`, `warehouse`, `current_stock`, `min_stock`, `unit_cost`, `supplier`, `lead_time_days`, `category`, `brand`, `unit_of_measure`, `barcode`, `sale_price`, `display_name`. Besides `column`, each accepts `cast` (`auto`, `number`, `integer`, `text`), `trim`, `case` (`none`, `upper`, `lower`), `decimal` (`auto`, `dot`, `comma`), `multiplier`, `default` and `value_map`. `GET /inventory-sync/fields` returns the full list of options and limits.

`missing_policy`	What happens to a SKU that stops coming in a full push: `ignore` (nothing), `mark_inactive` or `zero`.
`negative_policy`	Negative stock: `reject` (the row is rejected) or `zero`.
`duplicate_policy`	The same SKU and warehouse twice: `reject` or `sum`.
`default_warehouse`	The warehouse for rows that carry none.
`allow_new_warehouses`	Whether an unknown warehouse is created (by default no: the row is rejected).
`brake_max_vanished_pct`, `brake_min_row_ratio`, `brake_max_rejected_pct`, `brake_max_jump_pct`	The safety brake: by default it stops if more than 20% of SKUs vanish, if fewer than half the usual rows arrive, or if more than 50% are rejected.
`stock_model`	`snapshot` (each row is the current stock), `aggregate` or `ledger` (each row is a movement).

The dry run

```
curl -X POST https://app.stockai.es/api/v1/inventory-sync/profiles/$PROFILE/ingest \
  -H "Authorization: Bearer $STOCKAI_KEY" -H "Content-Type: application/json" \
  -d '{"batch_id":"night-2026-10-22","dry_run":true,
       "rows":[{"item_code":"SKU-001","on_hand":118,"site":"principal"},
               {"item_code":"SKU-002","on_hand":"42","site":"principal"},
               {"item_code":"","on_hand":5}]}'
```

```
"result": {
  "rows_read": 3, "valid": 2, "rejected": 1,
  "rejected_by_code": { "sku_blank": 1 },
  "rejected_sample":  [{ "code": "sku_blank", "params": {}, "sku": null, "row": 3 }],
  "would_create": 0, "would_update": 2, "would_leave_unchanged": 0,
  "changes_sample": [
    { "sku": "SKU-001", "warehouse": "principal", "action": "update",
      "fields": { "current_stock": { "before": 100.0, "after": 118.0 } } },
    { "sku": "SKU-002", "warehouse": "principal", "action": "update",
      "fields": { "current_stock": { "before": 570.0, "after": 42.0 } } }
  ],
  "brake_warning": null, "stock_model": "snapshot"
}
```

In the example, two rows would update stock (with before and after) and the third is rejected with `sku_blank`. Each rejection carries its code, its parameters and the row number.

The real batch

```
# Turn the profile on (refused with inventory_sync_dry_run_required until a dry run passed)
curl -X POST https://app.stockai.es/api/v1/inventory-sync/profiles/$PROFILE/enable \
  -H "Authorization: Bearer $STOCKAI_KEY"

# Send the batch for real
curl -X POST https://app.stockai.es/api/v1/inventory-sync/profiles/$PROFILE/ingest \
  -H "Authorization: Bearer $STOCKAI_KEY" -H "Content-Type: application/json" \
  -d '{"batch_id":"night-2026-10-22",
       "rows":[{"item_code":"SKU-001","on_hand":118,"site":"principal"},
               {"item_code":"SKU-002","on_hand":"42","site":"principal"}]}'

# "data": { "batch_id": "night-2026-10-22", "replayed": false,
#           "run": { "id": "isr_052d3da33a21", "status": "success", "run_kind": "push",
#                    "rows_read": 2, "rows_valid": 2, "created": 0, "updated": 2,
#                    "unchanged": 0, "rejected": 0, "duration_ms": 500 } }
# Same batch_id + same rows again: "replayed": true, same run, nothing applied twice.
# Same batch_id + different rows: 409 inventory_sync_batch_id_reused.
```

· `batch_id`: your batch id, 1 to 128 characters `[A-Za-z0-9._:-]`. Retrying with the same id and the same rows applies nothing twice.

· Without `snapshot_id` the batch is partial: it updates the SKUs it names and never treats an absent one as gone.

· Up to 50,000 rows per batch (more: 413 `inventory_sync_ingest_too_large`; send several).

· If your rows carry nested objects, they are flattened to dotted paths (`stock.on_hand`).

You can also send NDJSON (one JSON row per line), with the other fields as URL parameters:

```
printf '{"item_code":"SKU-003","on_hand":7}\n{"item_code":"SKU-005","on_hand":9}\n' |
curl -X POST "https://app.stockai.es/api/v1/inventory-sync/profiles/$PROFILE/ingest?batch_id=nd-1" \
  -H "Authorization: Bearer $STOCKAI_KEY" -H "Content-Type: application/x-ndjson" --data-binary @-
```

A full catalogue in several parts

```
# A full catalogue in 3 parts: the same snapshot_id, last=true only on the final part.
.../ingest  {"batch_id":"snap-22-a","snapshot_id":"snap-22","last":false,"rows":[...]}
.../ingest  {"batch_id":"snap-22-b","snapshot_id":"snap-22","last":false,"rows":[...]}
.../ingest  {"batch_id":"snap-22-c","snapshot_id":"snap-22","last":true, "rows":[...]}
# Parts are staged; the last one applies the whole snapshot with every safety brake.
```

With `snapshot_id`, the parts are staged and the one with `last: true` applies the whole catalogue at once, with every brake (vanishing SKUs, row drop). It is the right way to send "this is all my

stock" when it does not fit in one batch.

THE OVERVIEW: IS STOCK CURRENT?

```
curl https://app.stockai.es/api/v1/inventory-sync/overview -H "Authorization: Bearer $STOCKAI_KEY"


# "data": {
#   "state": "fresh",                // none | waiting | fresh | attention | blocked
#   "attention": [],                 // what only a person can settle, worst first
#   "sources": [{
#     "id": "isp_d194eddb57d3", "name": "ERP push", "origin": "push",
#     "state": "fresh", "health": "healthy", "enabled": true,
#     "data_as_of": "2026-10-22T20:46:46-06:00", "running": false, "expected_minutes": 60,
#     "last_run": { "id": "isr_17e09a684d26", "status": "success", "rows_read": 2,
#                   "created": 0, "updated": 2, "unchanged": 0, "rejected": 0,
#                   "error_code": null, "brake_overridden": false },
#     "files_7d": null
#   }],
#   "data_as_of": "2026-10-22T20:46:46-06:00"
# }
```

`state`	none (no sources), `waiting` (waiting for the first run), `fresh` (current), `attention` (something waits for a person) or `blocked`.
`attention[]`	What only a person can settle, worst first: a stock file held for a decision, a sync the brake stopped, a source that refuses us, a late sync, rejected rows. Each item carries the ids the action needs.
`sources[]`	Every source — database, file drop or push — with its freshness and last run. `files_7d` summarises the last 7 days of files on file sources.

`/overview` never answers 503: it is for reading. For an uptime monitor use `/health?strict=true`, which answers 503 if any profile is not ok:

```
# For an uptime checker: answers 503 when any profile is not ok

curl -i "https://app.stockai.es/api/v1/inventory-sync/health?strict=true" -H "Authorization: Bearer $ST
OCKAI_KEY"
```

OPERATING PROFILES

Method and route	What it does
`GET /inventory-sync/profiles`, `GET .../profiles/{id}`	Profiles with their status: on, last success, late, braked.
`PATCH /inventory-sync/profiles/{id}`	Changes a profile. If what it writes changes, it turns off until a new dry run.
`POST .../profiles/{id}/dry-run`	Dry run of a saved profile that reads a database.

Method and route	What it does
`POST .../profiles/{id}/run`	"Sync now": answers 202 with the run under way. `{"override_brake": true}` passes the brake once (audited).
`POST /inventory-sync/refresh`	"Refresh now" (everything, one profile or some `skus`); waits up to `wait_seconds` and honours a minimum time between runs (`status: cooldown`, `retry_after_s`).
`GET .../profiles/{id}/runs`, `.../runs/{run_id}`, `.../runs/{run_id}/rejected.csv`	Run history, one run's detail, and its rejected rows as CSV.
`POST .../profiles/{id}/disable`, `DELETE .../profiles/{id}`	Turn the profile off or delete it. The stock it synced stays as it is.
`GET /inventory-sync/freshness`, `/ownership`	How current stock is, and which profile owns each field.

Profiles as code (CI)

```
curl -X POST "https://app.stockai.es/api/v1/inventory-sync/profiles/apply?dry_run=true" \
  -H "Authorization: Bearer $STOCKAI_KEY" -H "Content-Type: application/json" \
  --data-binary @inventory-sync.json
# The document format: GET /inventory-sync/schema/profile.json ("schema": "stockai.inventory-sync/v1").
# Export an existing one: GET /inventory-sync/profiles/{id}/export?format=yaml
```

`POST /inventory-sync/profiles/apply` takes a JSON or YAML document: it creates it, or updates it by its `slug`. Applying the same file again answers `action: unchanged`, so your CI can apply it on every deploy. `POST /inventory-sync/profiles/validate` only validates and returns each problem with its path.

FILE DROP (SFTP OR S3)

If your ERP already leaves an export in a folder, there is nothing to program: an administrator sets up an SFTP server or an S3 bucket under Inventory sync, and StockAI picks up every new file. A file can feed sales (it replaces a dataset) or stock.

· A file is read only once it has finished uploading (two looks that agree on size and date, and at least a minute old).

· The same content is never applied twice.

· A suspicious file — empty, with other columns, or with far fewer rows — is held for a person to decide, instead of erasing the history.

· Then the file is moved to `processed/` or `rejected/` (with a `.reason.txt` note). It is never deleted.

> Not configured with a key
>
> File drop stores your server's credentials, so its routes (`/file-drop`) cannot be called with an API key. What you can do with the key is watch it: its sources and held files show up in `GET /inventory-sync/overview`.

AND SALES

For sales, the usual way is to replace the source's file every night with POST `/data-sources/{id}/file`. See Forecasts and sessions.

Webhooks

Have StockAI notify your system when something happens: which events exist, what they carry, how to verify the signature, when deliveries are retried and how to see each one.

A webhook is an `https://` address of yours that StockAI P0STs to every time an event you subscribed to happens. They are created through the API or under Automation, "Automatic notices" tab. Creating, rotating, testing and re-enabling need a plan with the API; reading and deleting always work.

CREATING A WEBHOOK

```
curl -X POST https://app.stockai.es/api/v1/webhooks \
  -H "Authorization: Bearer $STOCKAI_KEY" -H "Content-Type: application/json" \
  -d '{"url":"https://example.com/stockai-hook",
       "events":["purchase_order.approved","stockout.imminent"]}'


# "data": { "id": "123c733f-b575-4326-ac35-574383fb219a",
#           "url": "https://example.com/stockai-hook",
#           "events": ["purchase_order.approved", "stockout.imminent"],
#           "warehouse_ids": null,
#           "secret": "<64 hex characters, shown only now>" }
```

· `url` must start with `https://`. Private, local and cloud-metadata addresses are refused, and StockAI does not follow redirects.

· `events`: at least one from the list below.

· `warehouse_ids` (optional): limits the webhook to some warehouses. Without it, it inherits its creator's scope.

· `secret` is shown only in this response. Keep it: it is how you verify each delivery.

On the screen: "Add webhook", type the "Endpoint URL (https://)", tick the "Events to subscribe" and save. "Webhook signing secret" appears, also shown only once.

THE EVENTS

Event	When	`data` fields
`job.completed`	A training run finished successfully.	`job_id`, `session_id`
`job.failed`	A training run failed.	`job_id`, `session_id`, `error`
`purchase_order.approved`	An order was approved.	`po_log_id`, `po_number`, `warehouse`, `warehouse_id`, `sku_count`, `total_units`, `total_value`, `approved_amount`, `decided_by`
`purchase_order.rejected`	An order was rejected.	The order's + `decided_by`

Event	When	data fields
purchase_order.sent	An order was sent.	The order's + sent_at
purchase_order.cancelled	An order was cancelled.	The order's + cancelled_at, cancelled_by
stockout.imminent	A SKU enters stockout risk (once on entering, not every day).	sku, warehouse, warehouse_id, signal, current_stock, coverage_days, reorder_point, detected_on
commitment.at_risk	A customer commitment is at risk.	commitment_id, sku, warehouse, warehouse_id, customer, delivery_date, quantity, shortfall, latest_safe_order_date, order_date_passed
commitment.fulfilled	A customer commitment was fulfilled.	commitment_id, sku, warehouse, warehouse_id, customer, delivery_date, quantity, fulfilled_at
inventory_sync.run_finished	A sync run finished.	profile_id, profile_name, run_id, status, created, updated, unchanged, rejected
inventory_sync.blocked	A sync stopped and needs someone.	profile_id, profile_name, run_id, health, reason_code
inventory_sync.recovered	A failing sync works again.	Same as blocked

GET /webhooks/events returns this list with the exact fields. A field with no value comes as null, never missing. data carries no email addresses, phone numbers or free text somebody typed.

> Webhooks limited to warehouses
>
> A webhook limited to warehouses receives only those warehouses' events and never one that names no warehouse (a company-wide figure). Training and sync events are not about a warehouse and reach it regardless.

WHAT REACHES YOUR SERVER

```
POST /stockai-hook HTTP/1.1
Content-Type: application/json
User-Agent: StockAI-Webhooks/1
X-StockAI-Event: purchase_order.approved
X-StockAI-Delivery: 17cca2cb-7b41-4d8d-9407-8610ed8a5a3a
X-StockAI-Signature: t=1792468800,v1=5f2c...e91a

{
  "id": "evt_ced69c658fc14c5ea9d36307eda14da0",
```

```
  "type": "purchase_order.approved",
  "api_version": "2026-10-05",
  "occurred_at": "2026-10-23T02:46:00Z",
  "tenant_id": "ten_...",
  "data": {
    "po_log_id": "47e8f955-...", "po_number": 8, "warehouse": "principal",
    "warehouse_id": "b30808fc-...", "sku_count": 3, "total_units": 420.0,
    "total_value": 1310.0, "approved_amount": 1310.0, "decided_by": "..."
  }
}
```

`id`	The event id. It is the same across retries: deduplicate on it, because a delivery can arrive more than once.
`X-StockAI-Delivery`	The delivery id. Use it in your logs.
`X-StockAI-Event`	The event type, equal to `type`.
`X-StockAI-Signature`	`t=<Unix seconds>,v1=<signature>`. See below.

VERIFYING THE SIGNATURE

1. Read the raw body, as bytes, before parsing the JSON. Re-serialise it and the signature will not match.
2. Split `t` and `v1` out of the `X-StockAI-Signature` header.
3. Reject the delivery if `t` is more than 300 seconds from your clock (replay protection).
4. Compute HMAC-SHA256 with your `secret` over `t + . +` the raw body, in hex.
5. Compare with `v1` in constant time (`hmac.compare_digest`, `crypto.timingSafeEqual`).
6. Answer 2xx quickly and do the work afterwards. Deduplicate on `id`.

```
import hashlib, hmac, time


def verify(secret: str, header: str, raw_body: bytes, tolerance: int = 300) -> bool:
    parts = dict(p.split("=", 1) for p in header.split(",") if "=" in p)
    try:
        t, given = int(parts["t"]), parts["v1"]
    except (KeyError, ValueError):
        return False
    if abs(time.time() - t) > tolerance:            # older than 5 minutes: replay
        return False
    expected = hmac.new(secret.encode(), f"{t}.".encode() + raw_body,
                        hashlib.sha256).hexdigest()
    return hmac.compare_digest(expected, given)
```

```
# Flask:  verify(SECRET, request.headers["X-StockAI-Signature"], request.get_data())
# Then deduplicate on the envelope's "id" before acting.
```

```
import crypto from 'node:crypto'

export function verify(secret, header, rawBody, tolerance = 300) {
  const parts = Object.fromEntries(header.split(',').map(p => p.split('=')))
  const t = Number(parts.t)
  if (!t || !parts.v1 || Math.abs(Date.now() / 1000 - t) > tolerance) return false
  const expected = crypto.createHmac('sha256', secret)
    .update(t + '.').update(rawBody).digest('hex')
  const a = Buffer.from(expected), b = Buffer.from(parts.v1)
  return a.length === b.length && crypto.timingSafeEqual(a, b)
}

// Express: app.post('/stockai-hook', express.raw({ type: 'application/json' }), (req, res) => {
//   if (!verify(SECRET, req.get('X-StockAI-Signature') || '', req.body)) return res.sendStatus(400)
//   res.sendStatus(200)   // answer fast; do the work afterwards
// })
```

> The first version's headers, `X-Signature: sha256=<HMAC of the body>` and `X-Event`, are still sent so old receivers keep working. For a new one use `X-StockAI-Signature`, which includes the timestamp.

RETRIES AND AUTO-DISABLE

Attempt	When
1	As soon as the event happens
2	1 minute later
3	5 minutes later
4	15 minutes later
5 (last)	40 minutes later

· Retried on a network error, a timeout (10 s), a 5xx, a 408 or a 429.

· Any other status (a 4xx, a 3xx redirect) fails at once, with no retries: it will not change by waiting.

· Once the attempts are spent, the delivery is `failed` in the log. If your server is down for more than an hour, that event is lost: for what cannot be lost, also poll the API.

· A webhook that fails every delivery on 3 different days switches itself off and the account is told. Turn it back on with "Re-enable" or `POST /webhooks/{id}/enable`; events from while it was off are not replayed.

TESTING, REVIEWING AND ROTATING

```
# Send a test event (type webhook.test) and read the delivery log

curl -X POST https://app.stockai.es/api/v1/webhooks/$HOOK/test -H "Authorization: Bearer $STOCKAI_KEY"

curl "https://app.stockai.es/api/v1/webhooks/$HOOK/deliveries?status=failed&limit=50" \

  -H "Authorization: Bearer $STOCKAI_KEY"


# [{ "event_id": "evt_ced69c...", "event_type": "webhook.test", "is_test": true,

#    "status": "failed", "attempts": 1, "last_status_code": 405, "last_error": "http_405",

#    "next_attempt_at": null, ... }]


# New secret (the old one stops verifying at once), switch back on, remove

curl -X POST   https://app.stockai.es/api/v1/webhooks/$HOOK/rotate-secret -H "Authorization: Bearer $ST
OCKAI_KEY"

curl -X POST   https://app.stockai.es/api/v1/webhooks/$HOOK/enable        -H "Authorization: Bearer $ST
OCKAI_KEY"

curl -X DELETE https://app.stockai.es/api/v1/webhooks/$HOOK               -H "Authorization: Bearer $ST
OCKAI_KEY"
```

"Send test"	Sends a webhook.test event, signed like the real ones.
"Deliveries"	The log, newest first: status (pending, delivered, failed, abandoned), attempts, last status code, last error and next attempt. Filterable by status, up to 200 per page.
"Rotate secret"	Issues a new secret and the old one stops verifying at once: update your receiver right away.
"Re-enable"	Turns back on a webhook that switched off for failing.

In the example, the test went to an address that does not accept POST: it answered 405, which is not retried, and the delivery was failed on the first attempt.

To connect webhooks to Slack, Google Sheets or Jira without programming, see No-code automations.

The MCP server

Connect an AI assistant to StockAI with the Model Context Protocol: five read-only tools, by URL or with a desktop client such as Claude Desktop.

MCP is the protocol an AI assistant uses to call outside tools. StockAI has an MCP server at `/api/v1/mcp`: the assistant can ask what to buy today and answer from your data. It uses the same `sk_live_` key as the API, the same 120-calls-per-minute ceiling and the same daily ceiling. It needs a plan with MCP (Full, Corporate or trial); otherwise `403 plan_feature_locked`.

> MCP uses an API key: it is on the same plans as the API, trial accounts included, and never on the free plan.

THE FIVE TOOLS

Tool	What it returns	Arguments
`get_planning_context`	The active session, the detail (day, week, month) and the horizon. The starting point.	none
`get_morning_briefing`	The day's work: risks, the reason behind each recommendation, suggested supplier and value.	none required
`get_inventory_status`	The stock signal per SKU, most urgent first.	`signal` (`PEDIR_YA`, `PEDIR_PRONTO`, `OK`, `SOBRESTOCK`, `SIN_DATOS`), `supplier`, `limit` (1–500, default 50)
`list_data_sources`	Your sales sources and when they were updated.	`limit` (1–200, default 50)
`get_training_status`	Whether a session has finished training.	`session_id` (required)

- `get_inventory_status` is capped: it returns the most urgent first, sets `truncated` and reports how many match in total; the summary counts all of them. Filter by signal or supplier rather than raising `limit`.
- A filter that matches nothing says which kind of empty it is (`empty_reason`); an unknown signal is refused with the valid ones named.
- A refusal comes back as a tool error the assistant can read, with its `error_code`, not as a transport failure.

The tools warn the assistant that `SIN_DATOS` means "unknown", not "fine", and that a value marked as a StockAI assumption is not your own figure. That way the assistant never reports as safe something nobody measured.

> It only reads, always
>
> Over MCP nothing is uploaded, nothing is trained, no order is logged and no stock is edited, even with a write key. An assistant cannot show the confirmation card or offer an undo. Those actions stay in the app and the REST API. A "Read only" key is enough for everything.

WHERE IT IS AND HOW TO GET IN

· The address is `/api/v1/mcp` on your installation's domain; the API screen shows it in full under "Connect your assistant (MCP)".

· You get in with an ordinary API key in the `Authorization: Bearer sk_live_...` header. A "Read only" key is enough for everything.

· It shares the API's limits: 120 calls per minute per key, and your plan's daily ceiling.

· Questions are sent with `POST`. A `GET` to the same address answers `405`: the server opens no event stream, because every answer fits in the response to its question.

CONNECTING A CLIENT THAT TAKES A URL

```
URL      https://app.stockai.es/api/v1/mcp
Header   Authorization: Bearer sk_live_...
```

The server is stateless: no session to open, no connection to keep alive. It speaks the Streamable HTTP transport; requests go by `POST` and a `GET` answers `405` (there is nothing to stream). It accepts protocol revisions `2024-11-05`, `2025-03-26`, `2025-06-18` and `2025-11-25`.

CONNECTING CLAUDE DESKTOP (OR ANOTHER STDIO CLIENT)

1. Create a "Read only" key under Automation → "API Keys" with a name such as "claude-desktop".

2. Copy the file `mcp_server/stockai_mcp.py` from StockAI's source code to your computer. It is a single Python file with no dependencies: no `pip install` needed.

3. Open your client's configuration (in Claude Desktop, the `claude_desktop_config.json` file) and add the block below with the file's absolute path.

4. In `STOCKAI_URL` put your installation's root, without a trailing slash and without `/api/v1`: the script appends the path.

5. Restart the client and ask it "what should I buy today?".

```
{
  "mcpServers": {
    "stockai": {
      "command": "python",
      "args": ["/absolute/path/to/stockai_mcp.py"],
      "env": {
        "STOCKAI_URL": "https://app.stockai.es",
        "STOCKAI_API_KEY": "sk_live_..."
      }
    }
  }
}
```

The script is only a pipe: it forwards each message to `/api/v1/mcp` and returns the answer. If the key is wrong or the installation does not answer, the client receives a readable message instead of hanging.

TRYING IT BY HAND

```
# 1. Handshake
curl -X POST https://app.stockai.es/api/v1/mcp \
  -H "Authorization: Bearer $STOCKAI_KEY" -H "Content-Type: application/json" \
  -d '{"jsonrpc":"2.0","id":1,"method":"initialize",
       "params":{"protocolVersion":"2025-06-18","capabilities":{},
                 "clientInfo":{"name":"curl","version":"1"}}}'
# -> "result": { "protocolVersion": "2025-06-18",
#                "serverInfo": { "name": "stockai", ... }, "instructions": "..." }

# 2. The catalogue
curl -X POST https://app.stockai.es/api/v1/mcp -H "Authorization: Bearer $STOCKAI_KEY" \
  -H "Content-Type: application/json" -d '{"jsonrpc":"2.0","id":2,"method":"tools/list"}'
# -> get_planning_context, get_inventory_status, get_morning_briefing,
#    list_data_sources, get_training_status

# 3. A call
curl -X POST https://app.stockai.es/api/v1/mcp -H "Authorization: Bearer $STOCKAI_KEY" \
  -H "Content-Type: application/json" \
  -d '{"jsonrpc":"2.0","id":3,"method":"tools/call",
       "params":{"name":"get_inventory_status","arguments":{"signal":"PEDIR_YA","limit":20}}}'
# -> "result": { "content": [{ "type": "text", "text": "..." }],
#                "structuredContent": { ... }, "isError": false }
```

A key connected to an assistant reads your stock, your costs and your suppliers, and that assistant's provider receives them. Treat it like any credential and revoke it once it is no longer used.

Python and TypeScript clients

Two single-file clients with no dependencies, generated from the API itself: how to install them, build the client, make calls and handle errors.

The clients are in StockAI's source code: `sdk/python/stockai_client.py` and `sdk/typescript/stockai-client.ts`. They are generated from the API's description, with one method per endpoint, and a test fails if they drift from it.

INSTALLING

Python	Copy `stockai_client.py` next to your code. It uses only the standard library: there is no package to install.
TypeScript / JavaScript	Copy `stockai-client.ts` into your project. It uses `fetch`, so it works on Node 18+, Deno, Bun and browsers.

PYTHON

```
# Copy sdk/python/stockai_client.py next to your code. Standard library only.
from stockai_client import StockAI, StockAIError

api = StockAI("sk_live_...")                      # base_url="https://app.stockai.es" by default
# api = StockAI(key, base_url="https://stockai.yourcompany.com", timeout=60.0)

planning = api.get_planning()["data"]             # every call returns the full envelope
session = planning["active_session_id"]

urgent = api.get_inventory_status(signal="PEDIR_YA")["data"]["items"]

try:
    api.post_inventory_log_po(
        session_id=session,
        idempotency_key="6f1c2a0e-1b7d-4c55-9a51-3f0f4e0b8d21",
        body={"items": [{"sku": "SKU-001", "recommended_qty": 120,
                         "final_qty": 100, "status": "modified"}]},
    )
except StockAIError as e:
    print(e.status, e.error_code, e.error_params, e.retry_after)

# A file upload
with open("sales.csv", "rb") as f:
    api.post_data_sources_source_id_file("ds_66dede3ccf04",
                                         files={"file": ("sales.csv", f.read())})
```

TYPESCRIPT

```
// Copy sdk/typescript/stockai-client.ts into your project. No dependencies (fetch only).

import { StockAI, StockAIError } from './stockai-client'


const api = new StockAI(process.env.STOCKAI_KEY!)   // or new StockAI(key, 'https://stockai.yourcompany
.com')


const planning = (await api.get_planning()).data

const urgent = (await api.get_inventory_status({ signal: 'PEDIR_YA' })).data.items


try {
  await api.post_inventory_log_po({

    session_id: planning.active_session_id,

    'Idempotency-Key': crypto.randomUUID(),

    body: { items: [{ sku: 'SKU-001', recommended_qty: 120, final_qty: 100, status: 'modified' }] },

  })

} catch (e) {

  if (e instanceof StockAIError) console.log(e.status, e.errorCode, e.errorParams, e.retryAfter)

}
```

HOW METHODS ARE NAMED

· The name is the HTTP method plus the path: `GET /inventory/status` → `get_inventory_status`; `POST /purchase-orders/{po_log_id}/erp-reference` → `post_purchase_orders_po_log_id_erp_reference`. It is the same id as in the /desarrolladores reference.

· Path parameters come first, positional; query parameters by name (Python) or in an object (TypeScript).

· Every call returns the full envelope as the API sent it (`success`, `data`, `meta`); a file download returns the bytes.

· The constructor refuses a key that does not start with `sk_`. The default URL is `https://app.stockai.es`; for your own installation, pass it as the second argument.

ERRORS

A refused call throws `StockAIError` with the HTTP status (`status`), the `error_code`, the `error_params` and, when the API sent one, `retry_after` (Python) / `retryAfter` (TypeScript) in seconds. The clients do not retry on their own: apply the rules in Limits and errors.

WHEN A METHOD IS NOT ENOUGH

Both clients have a generic `request(method, path, ...)`. Use it for the routes that read the raw body, such as pushing rows to a sync profile or applying a profile document: the generated `post_inventory_sync_profiles_profile_id_ingest` and `post_inventory_sync_profiles_apply` methods take no body.

```
# Python: push rows through the generic request() (the generated ingest method sends no body)
```

```
api.request("POST", f"/inventory-sync/profiles/{profile_id}/ingest",
            body={"batch_id": "night-2026-10-22", "rows": rows})


// TypeScript
await api.request('POST', '/inventory-sync/profiles/' + profileId + '/ingest',
                  { body: { batch_id: 'night-2026-10-22', rows } })
```

No-code automations (n8n, Make, Zapier)

The n8n templates that ship with StockAI, how to import them and what each one does, and how to build the same flows in Make or Zapier.

With webhooks and the API you can connect StockAI to Slack, Google Sheets, Jira or Google Drive without writing a program. StockAI ships three templates for n8n, in the `integrations/n8n/` folder of its source code.

THE TEMPLATES

File	What it does	Needs
`order-approved-to-slack-and-sheets.json`	When an order is approved (`purchase_order.approved`), posts a message to a Slack channel and appends a row to a Google Sheet with order, warehouse, SKUs, units, value, approved amount, approver, event id and date.	A StockAI webhook, Slack and Google Sheets.
`stockout-imminent-to-jira.json`	When a SKU enters stockout risk (`stockout.imminent`), creates a Jira issue: "Stockout risk: SKU at warehouse (N days of cover)".	A StockAI webhook and Jira.
`drive-file-to-dataset.json`	When a new file lands in a Google Drive folder, downloads it and replaces the file of a StockAI sales source (`POST /api/v1/data-sources/{id}/file`). If StockAI refuses it, posts to Slack.	A write key, Google Drive and Slack.

> The templates are checked by automated tests (structure, only real endpoints and fields, no secrets, and the signature step run against real signatures), but their authors have not imported them into a live n8n. After importing, review every node.

IMPORTING A WEBHOOK TEMPLATE

1. In n8n, create a new workflow and import the JSON file into it (workflow menu → import from file).
2. Open the first node, "StockAI webhook", and copy its production URL.
3. In StockAI, open Automation → "Automatic notices", press "Add webhook", paste that URL and tick only the template's event (`purchase_order.approved` or `stockout.imminent`). Save.
4. Copy the "Webhook signing secret" (shown only once).
5. In n8n, put that secret in the environment variable `STOCKAI_WEBHOOK_SECRET` and allow the crypto module with `NODE_FUNCTION_ALLOW_BUILTIN=crypto`.
6. Pick your credentials and fill in the blanks: the Slack channel and the Sheet, or the Jira project and issue type.
7. Activate the workflow and, in StockAI, press "Send test" on the webhook. Check "Deliveries" to see that it arrived.

> Do not remove the "Verify signature" node
>
> It is the second node of every webhook template: it verifies each delivery's signature and age and drops repeats. Without it, anybody who knows the URL could trigger your workflow.

IMPORTING THE GOOGLE DRIVE TEMPLATE

1. Find your sales source's id with `GET /data-sources` or under My sales.
2. Import `drive-file-to-dataset.json` into n8n.
3. In the "Replace the dataset" node, replace `REPLACE_WITH_DATA_SOURCE_ID` with that id. If your StockAI is not `app.stockai.es`, change the domain too.
4. Create an n8n "Header Auth" credential named `Authorization` with value `Bearer sk_live_...` (a write key) and assign it to that node.
5. Pick the Drive folder in the first node and the Slack channel in "Say it failed".
6. Activate the workflow and drop a file in the folder. The source keeps its column mapping, and if the session has a schedule, StockAI retrains on its own.

MAKE AND ZAPIER

Make and Zapier do not import a file from us, so the same flow is built with their generic modules:

Receiving a StockAI event	Make: "Custom webhook". Zapier: "Catch Hook". Paste its URL when you create the webhook in StockAI.
Verifying the signature	Needs code. In Zapier, a "Code by Zapier" step with the recipe below; in Make, a module that computes HMAC-SHA256.
Calling StockAI	Make: "HTTP > Make a request". Zapier: "Webhooks by Zapier > Custom Request". URL `https://app.stockai.es/api/v1/<path>`, header `Authorization: Bearer <key>` (a write key for POST/PATCH/DELETE). A file goes as `multipart/form-data` with the field `file`.

```
// Code by Zapier (JavaScript). Inputs: secret, signature (the X-StockAI-Signature header), body (raw t
ext)

const crypto = require('crypto')

const parts = Object.fromEntries(inputData.signature.split(',').map(p => p.split('=')))

const fresh = Math.abs(Date.now() / 1000 - Number(parts.t)) <= 300

const expected = crypto.createHmac('sha256', inputData.secret)

  .update(parts.t + '.' + inputData.body).digest('hex')

output = [{ valid: fresh && expected === parts.v1 }]
```

Mind: the code step must receive the delivery's raw body, exactly as it arrived. If the tool has already parsed it as JSON and rebuilds it, the signature will not match.

> There is no StockAI app in the Make or Zapier catalogues: it needs each vendor's review. It will be built when a customer asks for it.

Troubleshooting

What each notice means and what to do about it.

StockAI will not accept my file

What each notice means when you upload sales or inventory, why it appears, and what to change in the file so it goes in.

Almost every rejection is fixed in the file itself. Find the message you see below; each one says what it means and what to do.

UNSUPPORTED FORMAT

What you see: "We cannot read .pdf files. Upload one of these formats: ..." (with your file's extension).

Why: sales are accepted as CSV, Excel (`.xlsx`, `.xls`), Parquet and JSON. A PDF, an image or a compressed file cannot be read as a table.

What to do: export the report from your system as CSV or Excel. If you do not know where to start, download the template: its columns are `sku`, `fecha` (date), `demanda` (demand), `tienda`, `inventario`, `costo` and `precio`, and only the first three are required.

THE FILE IS TOO LARGE

What you see: "The file is ... MB and the limit is ... MB. Upload a smaller one or split it up."

Why: each account has a maximum size per file. See Usage limits.

What to do: drop columns StockAI does not use (long descriptions, addresses, notes), save it as CSV instead of Excel, which is lighter, or upload it in parts. If your history genuinely does not fit, write to us from the notice.

THE FILE IS EMPTY

What you see: "The file for "..." is empty or has no columns. Upload a CSV with a header row and data." In the inventory importer: "We could not use a single row of the file. Check that it has a product-code column."

Why: the file has no header row, no data rows, or no row carries the product code.

What to do: open it and check that the first row holds the column names and that there is data below. If your system exports a title or a logo above the table, delete it.

IT CANNOT BE READ

What you see: "We could not read the file you uploaded. Check that it is a valid CSV or Excel file and try again." In inventory: "We could not open the file as a spreadsheet. Export it again as .xlsx or .csv."

Why: the file is damaged, was cut off while downloading, or has an extension that does not match its content (for example, an HTML file renamed to `.xls`, which is how some systems "export to Excel").

What to do: export it again from your system, open it in your spreadsheet to confirm it looks right, and save it again as `.xlsx` or `.csv`.

THE FILE CONTAINS A NUL BYTE

What you see: a notice that the file could not be read, with the technical detail: "The file contains a NUL byte (first seen on line N). Rows containing one cannot be imported, because the value would be silently truncated. Re-export the file from your system."

Why: a NUL byte is an invisible character (code zero) that should not be in a text file. It usually appears when a system exports in an unusual encoding, when the file was left half-written, or when it was copied from a database that stores fixed-length fields. If StockAI let it through, that cell's value would be cut short without warning, so it refuses instead. The line number tells you where the first one is.

What to do: export the file again from your system, preferably as UTF-8 CSV. If the problem persists, open it in your spreadsheet and "Save as" CSV: that drops invisible characters. The inventory importer does not reject the whole file: rows with a NUL byte are skipped and counted among those left out.

"1.250": ONE THOUSAND TWO HUNDRED FIFTY, OR ONE POINT TWO FIVE?

What you see: in the inventory importer, the question "Your file writes numbers like 1.250. How much is that?"; when uploading sales, the finding "We cannot tell whether the comma separates thousands or decimals".

Why: in Latin America "1.250" usually means one thousand two hundred fifty; in a system set up in English, one point two five. If nothing in the file settles it, StockAI does not guess: a stock of 1250 read as 1.25 turns a full warehouse red.

What to do: pick the option that matches your system. If you are unsure, look in the file for a number you know, such as the stock of a product you counted yesterday. If your integration uploads inventory through the API, the answer is a 422 with code `inventory_import_number_format_unclear`: "Your file writes numbers like …, and nothing in it says whether that is … or …. Upload it from Set up my inventory to choose, or fix it in your system." The integration can answer the question by stating the format in the call (see the reference).

ROWS LEFT OUT OF THE INVENTORY

What you see: in the importer's summary, "Rows with problems left out: …" and "Rows with no product code, skipped: …", with examples such as "Row 214 (SKU-001): "N/A"".

Why: a row with no product code cannot be assigned to anything. A row with text where a number belongs ("N/A", "sold out"), with negative stock or cost, or with a NUL byte, is left out rather than filled with an invented value. If a product appears more than once, the last row wins.

What to do: fix the rows the summary names and import again. If you already corrected some products by hand in StockAI, tick "Do not overwrite what I corrected by hand" so the file only fills what is missing.

THERE IS SOMETHING YOU HAVE TO DECIDE FIRST

What you see: when confirming your sales columns, the block "There is something you have to decide first", with the continue button switched off. If you try to train anyway: "Before training you have to decide what to do about the problems we found in the file…".

Why: the data check found something that would change the forecast without telling you, such as dates that could be day/month or month/day, or a comma that could separate thousands or decimals.

What to do: answer each question. Every option says what it does and what it costs you if you get it wrong; the one marked recommended is only a suggestion. Once none is left unanswered, the button switches on by itself.

If the message is "This file cannot produce a forecast, and no correction would change that. Check the file and upload it again.", no question will fix it: it is usually a wrong column mapping (for example, the quantity column points at text). Fix the mapping or upload a different file.

PRODUCTS MISSING AFTER TRAINING

What you see: under Inventory, a notice that some uploaded products were left out of the forecast, with the reason "Only … rows of history (at least 20 are needed)".

Why: a product needs at least 20 periods of history to enter the forecast. With fewer, there is no way to measure whether a model gets it right, so it is left out rather than given an unsupported forecast.

What to do: if the product is new, wait for more history. If you have older history in another file, upload it together. If you sell little each day, try a weekly or monthly detail level: see Granularity. These products do not affect the rest of your recommendations.

A product says "No data"

"No data" is not an error and not a safe product: it is a product missing something needed to compute its signal. Here is what is missing and how to supply it.

The stock signal needs two things from each product: a forecast (how much you will sell) and a recorded stock (how much you have). If either is missing, the product shows "No data" (stored as `SIN_DATOS`): no signal, no coverage and no suggested order quantity.

> "No data" means "we do not know", not "it is fine". A product with no recorded stock could be out of stock right now. That is why StockAI neither paints it green nor counts it as zero risk.

ITS STOCK WAS NEVER RECORDED

What you see: "No data" in the signal and "No record" in the stock column.

Why: StockAI does not invent zeros. An invented zero is indistinguishable from a counted one and would turn a full warehouse red, so until you say how much you hold, the product stays without a signal.

What to do: load the stock under Set up my inventory, by uploading your system's file or by filling it in under "Start with these". You can also edit it on the product card under Inventory. See Set up your inventory.

IT HAS NO STOCK RECORDED IN THAT WAREHOUSE

What you see: when looking at one warehouse, "No data" with the note "Stock for this product was never recorded in this warehouse. That is not the same as zero: we do not know."

Why: with several warehouses, stock is recorded per warehouse. If your file or system only carries the main warehouse's stock, the others have no figure. That used to be read as zero, and StockAI suggested restocking every branch while the goods sat in the main one; now it shows as what it is: a missing figure.

What to do: record that product's stock in that warehouse, even if it is zero when it really is empty. See Warehouses and transfers.

IT HAS NO FORECAST

What you see: "No data" on a product that does have stock.

Why: the product is not in the active run, for one of these reasons:

- It has fewer than 20 periods of history and was left out before training. Inventory says so in the notice about products left out of the forecast, with the reason.
- It was not in the sales file the active run trained on (for example, a new product you added afterwards).
- A reliable forecast could not be produced for it.

What to do: for a new product, include it in your next sales upload. If it lacks history, wait for it or try a weekly or monthly detail level (Granularity). If you believe it should be there, check under History which file the active run used.

THE "ESTIMATED" LABEL

This is not the same as "No data". A product with a signal can carry values marked "estimated": they are StockAI's assumptions because nobody set them. The most common:

Lead time	15 days, until you set it on the product or its supplier, and until StockAI learns it from 3 receptions. See Learned lead time.
Service level	95%, until you change it. See Safety stock.
Minimum order (MOQ)	1 unit.

The signal is computed all the same, but on assumptions. A supplier who really takes 45 days will be flagged too late while StockAI keeps assuming 15. As soon as you record the real figure, the label disappears.

THE VALUE SHOWS AS "—"

When the cost is missing, StockAI cannot value the stock or the order, and shows "—" instead of zero. The product still has a signal; what is missing is its money value. Add the cost under Set up my inventory and the figures fill in.

Account and access problems

Unverified email, forgotten password, expired trial account, plan limit, permissions and other notices that stop you from doing something.

YOU HAVE NOT VERIFIED YOUR EMAIL YET

What you see: an amber strip at the top of the app with "Resend email", or the message "You have not verified your email yet. Open the link we sent you to activate your account."

Why: you can sign in, upload files, train and see the stock signal without verifying. What stays blocked are the actions that leave your company: inviting people and sending orders to suppliers by email or WhatsApp. An API key cannot send anything out either while no administrator has a verified email.

What to do: open the link in the email we sent when you signed up. If you cannot find it, check your spam folder, then press "Resend email".

THE VERIFICATION LINK EXPIRED

What you see: "This verification link is invalid or has expired. Request a new one below."

Why: the link lasts 24 hours and works only once.

What to do: on that same screen, type your email and ask for a new link.

I FORGOT MY PASSWORD

1. On the sign-in screen press "Forgot password?".
2. Type your email. If an account exists, a 6-digit code arrives; the screen does not say whether the email exists, on purpose.
3. Enter the code. It expires in 15 minutes and stops working after 5 wrong tries: ask for another.
4. Set your new password: at least 8 characters, with at least one letter and one number.

THE TRIAL ACCOUNT EXPIRED

What you see: when signing in, "This trial account has ended. You can start a new one from the home page."

Why: a trial account lasts 24 hours. When it ends it is erased, along with everything you uploaded.

What to do: start another from the home page, or create your account to keep your data. If you wrote to us from the trial account and we have not answered yet, we do not erase it until we do.

Other notices when asking for a trial account:

· "No trial accounts are available right now. Try again in a while." — too many are active at the moment.

· "You already created several trial accounts from this connection today. Use the one you have or come back tomorrow." — 3 are allowed per connection per day.

YOU REACHED YOUR PLAN LIMIT

What you see: the dialog "You reached your plan limit", or a message saying how much you have used of how much and asking you to write to us to raise it. If you see a feature-unavailable card instead (or a message saying the API is not enabled), it is not a room ceiling: your account does not have that feature enabled.

Why: each account has ceilings on how much fits (products, users, warehouses, saved forecasts, API keys and file size). See Usage limits.

What to do: free up room (for example, delete a saved forecast you no longer use under History) or write to us from the same dialog, by WhatsApp, email or the form. There is nothing to buy on screen: raising a ceiling is a conversation.

YOUR ROLE CANNOT DO THIS

What you see: "Your role cannot do this. Ask an administrator at your company to do it, or to change your role."

Why: with the read-only role you see everything but change nothing: no uploads, no training, no stock edits, no orders logged. An analyst does all of that but does not manage users. See Users and roles.

What to do: ask an administrator at your company to do it, or to change your role under Users.

TOO MANY ATTEMPTS

What you see: "Too many attempts. Wait a few minutes and try again." In the assistant: "Too many requests — please wait a moment before sending another message."

Why: StockAI limits repeated sign-in and code attempts so nobody can guess a password. The assistant takes 20 messages per minute for the whole company.

What to do: wait a few minutes and try again.

THE ASSISTANT IS UNAVAILABLE

What you see: in the assistant, "This installation has no language model configured, so the assistant cannot answer...".

Why: the assistant needs a DeepSeek key on the installation, and this one has none. The rest of StockAI — forecasts, the stock signal and purchase orders — does not depend on it and works as usual.

What to do: whoever administers the server turns it on under Installation, on the assistant's card.

THIS ACCOUNT DOES NOT OPERATE THE INSTALLATION

What you see: under Installation, on the "This installation" tab, the notice "This account does not operate the installation".

Why: the server's service configuration (email, WhatsApp, assistant) belongs to whoever administers the deployment, not to a company's admin role. Those people are named in the server's `INSTANCE_ADMIN_EMAILS` variable.

What to do: as your company's administrator you can set up your own channels on the "My channels" tab. If you are the one who installed StockAI, add your email to `INSTANCE_ADMIN_EMAILS` and restart the server.