

Product Brochure

Inventory Planner by Sage

Accurate, hassle-free inventory planning
for e-commerce and retail brands

CitySoft

Sage Partner



Inventory
PLANNER by Sage



Table of Contents

Introducing Inventory Planner by Sage	Page 3
Our Solution	Page 4
Features in Detail	Page 5
Why Choose Inventory Planner	Page 12
Next-Gen Tech for Next-Gen Retail	Page 15
Customer Success	Page 16
Scale With Sage Retail	Page 18

Introducing Inventory Planner

Transform Your Inventory, Transform Your Business

Inventory Planner by Sage is the premier inventory planning software for e-commerce and retail businesses – and is one of the highest rated inventory planning apps on Shopify.

Inventory Planner helps retailers:



Accurately forecast customer demand, so the right merchandise is always in the right place and the right time



End cash flow killers like stockouts and overstock (once and for all)



Automate inventory purchasing to save tons of time

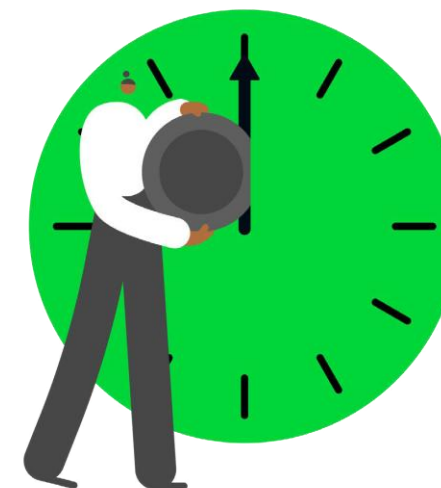


Gain visibility and control, with all sales and inventory info in one place



Make faster, smarter decisions with 200+ metrics for fully configurable reporting

“The average Inventory Planner customer saves 50+ hours each week and 3 full-time hires”



A cutting-edge solution for challenging times

- Poor cashflow is the main reason behind the failure of 82% of businesses
- Inventory and cash flow are directly linked - Inventory is the biggest expense for many merchants
- Optimizing inventory means optimizing cash flow



Inventory Planner is the best inventory planning tool on the market

- 10+ years experience as the market leader
- 100s of integrations to leading platforms
- 1000s of top retail brands as loyal customers

Our Solution

Built-for-Retail Features and Game-changing Functionality



Our Solution

Forecasting

Reliably predict your sales, maximize your profit



Get next-level forecasting functionality so you can easily predict what your customers will buy (even in turbulent times).



Seasonal, non-seasonal, and retail products all sell differently. Pick and choose the most suitable forecasting configuration for each product to guarantee accuracy.



Trends emerge overnight. Inventory Planner constantly monitors your sales patterns and adjusts demand forecasts for you, so you always have the right stock for the next trend.



Inventory
PLANNER by Sage

Accurately forecast customer demand

- Configurable and flexible forecasting methods to suit your needs
- Forecast for multiple inventory locations or warehouses
- Make smarter replenishment decisions based on forecasted demand to eliminate safety stock
- Optimize accuracy by factoring in supplier lead time, stock-out periods, seasonality and trends
- Forecast components needed for bundles and assembly items
- Align your marketing with your forecasting

"Inventory Planner helps us keep stockholding low while avoiding stockouts by providing accurate forecasting and critical inventory data. This has led to a 20% improvement in stock turn, which is an incredible result."

Marcus Hill
Co-founder and CEO
Bower Collective

Our Solution

Purchasing

Never over or under order again, even when markets shift



Gain the power to protect your cash flow by always knowing exactly how much inventory to buy, and when to buy it.



Access purchasing recommendations for all SKUs (including bundles and assembly items) based on up-to-date demand forecasts.



Generate POs automatically based on pre-set supplier info (like minimum order quantity), saving hours every week.



Make data-driven replenishment decisions

- Replenish the right products at the right time to boost cash flow
- Get alerted by automatic purchasing recommendations so you never miss a sale
- Save time on PO creation by automatically factoring in minimums and case sizes
- Easily scale orders to fit shipping container space, maximizing space to minimize costs
- Plan purchasing budgets to meet your revenue goals



“Using Inventory Planner, we were able to release \$1.5M from excess stock. In today’s environment, who wouldn’t want a million dollar cash buffer?”

Kevin Dalaeli
President and COO
Kos

Our Solution

Reporting

Make faster, future-focused decisions



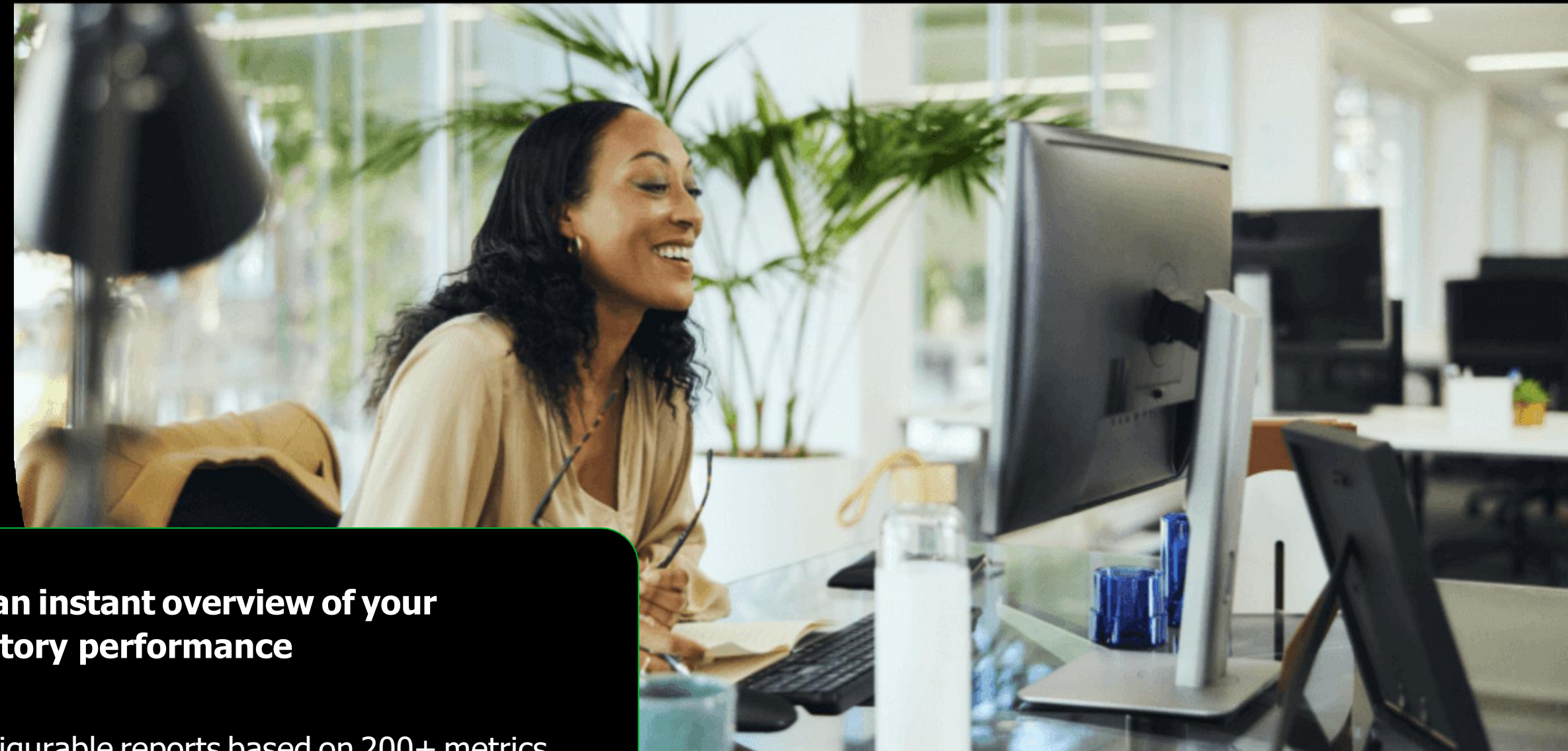
Stay ahead of trends with 200+ meaningful and intuitive metrics your whole team can easily understand (from top level detail to granular SKU-by-SKU analysis).



Eliminate wasted time consolidating reports. See all of your inventory and sales data in one place.



Compare performance across locations and proactively avoid overstock and stockouts with a best-in-class overstock report that highlights last sold date, overstock units and overstock costs.



Gain an instant overview of your inventory performance

- Configurable reports based on 200+ metrics (from top level detail to granular SKU-by-SKU analysis)
- Open-to-Buy report so you can plan beyond your next PO
- Prioritize purchasing based on insights like forecasted lost revenue or forecasted lost profit
- Spot 'cash-drainer' products before they become an issue
- Compare inventory performance across locations

"Inventory Planner is so good that I almost don't want to tell other people about it in case they get it too and it ruins our competitive advantage!"

Steve Velthove
Founder and COO
[Inside U](#)

Our Solution

Integrations

Build a truly scalable tech stack



See all your sales and inventory data in one simple dashboard



Plug and play integrations with 30+ leading platforms for every stage of growth



Robust connectivity that won't let you down, even when sales spike

"Talking to a real expert and not just signing up to a system you feel alone with was a huge selling point for us – as well as it connecting to Shopify so all our data was in one place."

Amber Bertram
Inventory Manager
Cara & Co



Our Solution

Up-to-date Visibility



Up-to-date stock and sales data in one place, so you always know where you stand with your inventory



Real-time notifications for informed decision making and effortless control over your inventory

"Inventory Planner has saved us £100,000 by increasing our visibility. In the current market when demand is unpredictable and costs are sky high, you can't afford NOT to have Inventory Planner."

Michael Tomchin
Founder and CEO
Cycology



Inventory
PLANNER by Sage



Our Solution

Retail Analytics



Identify products that power your profitability with visualized insights on contribution margins, ad spend and customer metrics



Identify the true profitability of every product to guide decisions on marketing spend, discounting and replenishment



Save time with automated recommendations to boost sales, reduce costs, and optimize pricing



Inventory
PLANNER by Sage



Our Solution

Expert and highly rated Support

We're with you every step of the way



From expert-led onboarding to ongoing consulting and highly rated support, we'll ensure you get the very best from Inventory Planner.

"Great, fast support every time. Whenever I have a question about how inventory planner works or run into an issue, I always get extremely well-thought-out, fast responses to my problems. The reps are friendly, knowledgeable, and have excellent communication skills, which is rare for many software support teams. These guys are a joy to do business with."

Collin,
Trustpilot Review



Inventory
PLANNER by Sage



Why Choose Inventory Planner

The planning tool of choice for scaling and high-growth merchants



Automate your forecasting

Spreadsheets are time-consuming, inaccurate and unreliable. Inventory Planner produces always-up-to-date, automatic forecasts that factor in promotions, trends and historical sales.



Simplify your replenishment process

End guesswork with simple, easy-to-understand purchasing recommendations for all variants, brands, custom categories, suppliers and locations.



Automatically create POs

Automatically create POs directly from your buying recommendation report, saving tons of time and guesswork.



Easily manage vendors

Easily track purchase orders from one centralized hub and store notes about each supplier as well as pre-set supplier info (currency, minimum order quantity, payment terms).



Enable automatic warehouse transfers

Easily transfer inventory based on up-to-date forecasts for all locations including your physical stores, warehouses, FBAs and 3PLs.



Configure your reporting

Turn complex data into meaningful insights that truly matter to your business with highly configurable reports your whole team finds useful.



Simplify order picking

Map your warehouses, making it faster and easier to pick and pack orders – and cutting the risk of mis-picks, which annoy customers and hit revenue.



Analyse and optimize your performance

Gain a better understanding of your inventory performance across multiple locations with deep insights that offer high level detail or SKU-by-SKU specifics, depending on your needs, alongside automated recommendations to optimize your stock purchasing.



"When you run a \$100M e-commerce business, you have to get forecasting right. Inventory Planner has been phenomenal. It's packed with game-changing features that have transformed our business."

Trevor Martin, VP Operations, [Snow](#)



Next-Gen Tech for Next-Gen Retail

Investing in technology is the best (and only) way for retailers to overcome the top five inventory concerns facing merchants today:



Demand forecasting and planning



Seasonality and trends



Stock accuracy and visibility



Inventory management



Supplier management

*Source: Inventory Planner Survey of 500 merchants



Inventory
PLANNER by Sage

How does Inventory Planner directly address these issues?

• **Best-in-class forecasting and planning**

Inventory Planner is a top-rated software for inventory planning and demand forecasting. It reveals exactly which inventory to order and when, based on an accurate calculation of how much you will sell.

• **Easy, fast inventory management**

Simplify or automate tedious, time-consuming inventory management tasks to free up time for more important things and dramatically boost productivity.

• **Trend-spotting (from a mile off)**

Forecasts factor in sales trends and seasonality alongside historical sales data, which are then turned into buying recommendations with upcoming trends flagged up.

• **Simple supplier comms**

All vendor information can be handled on one platform which your whole team can use. Supplier info (such as currency, minimum order quantity and payment terms) can be pre-set so that it's automatically applied to POs and forecasts.

• **Crystal clear visibility**

Retailers gain control and visibility across multiple locations, in multiple regions, and across multiple channels. Advanced reporting with more than 200 metrics help merchants stay on track.

Customer Success



Top-rated e-commerce inventory planning app

Over 100 five-star reviews on Shopify, Amazon, BigCommerce and review websites like Capterra



Powering 2,600+ worldwide brands

Thousands of merchants worldwide trust Inventory Planner. Our app runs to the heart of companies in all industries, from startups and scale-ups to enterprise-level brands, including SNOW®, Proozy, KOS, AYBL and Manière De Voir.



Better together

Inventory Planner by Sage is a premier partner of leading e-commerce and marketplace platforms, alongside top ERP providers, offering out-of-the-box connectors to Shopify, BigCommerce, Amazon and more.

Inventory Planner by Sage customers are set for success



OZBACKCOUNTRY

"Our business simply wouldn't operate without Inventory Planner. It's absolutely worth the investment for us – the ROI is massive."

✓ 100s hours saved each month

✓ 1000s of SKUs handled with ease

John Mac, Co-Founder

M A X

S T O N E

"Inventory Planner provides us with complete visibility across our whole range, in one handy place. It's made a huge difference."

✓ 120% YoY growth

✓ 92% in stock rate

Anushka Jain, E-Commerce Manager



"We've tested it and the data Inventory Planner throws up can be trusted 100%. Now we can easily and confidently stay on top of our replenishment."

Marco Valle, COO

✓ £320K saved in lost profit

✓ 19 days reclaimed each month

AYBL

"Inventory Planner stops me getting bogged down by managing day-to-day stuff and frees me up to focus on the bigger picture."

Reiss Edgerton, Founder & CEO

✓ 100 hours a month saved

✓ 3 hires saved

Freedom Rave Wear

"If you buy the wrong items and they don't sell, that could end up being a six-month long mistake. Inventory Planner enabled us to see early on, there's huge value in making winning picks."

Mike Hodgen, Co-Founder

✓ 66% cut in stock holding

✓ 100% revenue growth



"Our investment in Inventory Planner has paid for itself thousands of times over!"

James Ewens, Head of E-Commerce

✓ 100s hours saved each month

✓ 1000s of SKUs handled with ease

Scale Your Business With Sage Retail

Extend the power of Inventory Planner

Access a suite of best-in-class retail software that can be used either as standalone solutions or seamlessly integrated into the expansive Sage-built tech stack, unlocking limitless growth potential.

Whether you need the advanced accounting capabilities of Sage Intacct, the reliable inventory insights of Inventory Planner by Sage, or the automation and simplification of Brightpearl by Sage, we've got you covered with the ability to combine products or use them standalone.



Use industry-leading accounting software to centralize your data for clear insights across all your retail and e-commerce channels.



Simplify and automate order processing, inventory management, and post-purchase tasks to boost efficiency.



Forecast sales and receive reliable purchasing recommendations to increase profits, save time, and adapt to market changes.



Benefit from a speedy setup in weeks, not months or years, with our expert-led onboarding, continuous support, and training for your team



**Ready to see how
Inventory Planner
can transform
your business?**

For more information or a presentation please
contact CitySoft sales@citysoft.net.au

