

Shopify Purchase Order Tips & Tricks

A practical guide to creating, tracking, and receiving purchase orders in Shopify — built from real client coaching sessions with Management One consultants.

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Shopify replaced the Stocky app with a native Purchase Order system built directly into Products > Purchase Orders. It works differently than Stocky did, and the terminology has changed too — most notably, once you receive against a PO, Shopify tracks that activity as a **Transfer**, not a purchase order. This guide walks through the process end to end, using the same tips Management One consultants share with clients during onboarding and coaching calls, so your team can get comfortable fast and avoid the most common mix-ups.

In this guide

- 1 The Big Idea: PO vs. Transfer
- 2 Before You Start: Products & Suppliers
- 3 Creating a Purchase Order, Step by Step
- 4 Linking to a Transfer & Setting Expected Arrival
- 5 Receiving & Checking Costs
- 6 Partial Shipments, Backorders & Cancellations
- 7 Migrated Stocky Orders: What to Know
- 8 Exporting, Reporting & the On-Order Report
- 9 Quick-Reference Checklist & FAQ

1 The Big Idea: PO vs. Transfer

This is the single most important mental model for working with Shopify purchase orders. In Shopify, **creating a purchase order does not, by itself, get picked up as on-order inventory**. You have to link that PO to a **Transfer** record, and the Transfer is what actually moves the inventory into Retail ORBIT's nightly sync and on-order reporting.

WHY IT'S CALLED A "TRANSFER"

Shopify treats receiving a PO as a transfer of inventory from your vendor to your store — which is a different use of the word than most retailers are used to (a transfer between locations). As one Management One consultant put it, "nobody in retail would use that as a transfer," but it's the term Shopify has settled on, so it's worth getting used to.

The relationship between the two records:

- **Purchase Order** — your official record of what was ordered, from whom, at what cost. This is what you can export as a PDF and what shows vendor-facing details like terms and reference numbers.
- **Transfer** — created when you link a PO to a transfer (or is auto-created depending on flow). This is where you actually receive items, and it's the record Retail ORBIT reads each night to populate on-order and receiving data.
- The PO and its linked Transfer can always be toggled between — open the transfer, click the linked PO number to check pricing, then jump back to the transfer to finish receiving.

Best-practice workflow: Create the purchase order first, then use the option on the PO page to generate/link its transfer. Going forward, avoid working only in Transfers without a linked PO — you'll lose the ability to see cost, terms, and a clean audit trail.

2 Before You Start: Products & Suppliers

Shopify's PO system has a few prerequisites that Stocky didn't require. Getting these right up front will save a lot of backtracking.

Products must exist first

In Stocky, if you started a PO and the style wasn't in the system yet, you could add a new style on the fly and it would kick you into Shopify to create it, then bring you back. **That shortcut no longer exists.** If you have a stack of new invoices from market, create all of the products in Shopify first, then go build the purchase order.

Suppliers are a separate list from your vendor list

Shopify's PO "Supplier" field pulls from its own list — it is not the same as your product/vendor tagging elsewhere in Shopify, and it does not carry over automatically from Stocky. The first time you order from a vendor, you'll add them as a supplier directly from the PO screen (click Add Supplier, type the name, and it saves for next time).

One PO can only ship to one location

Shopify currently does not support a single purchase order receiving into multiple locations. If you have multiple stores, you'll need to create a separate purchase order for each destination location, even if you're ordering from the same supplier at the same time.

One supplier per purchase order

Unlike Stocky, where you could sometimes group multiple vendors under one style number, each Shopify PO is tied to a single supplier. If you're ordering the same item (say, a basic white tee) from three different vendors, that's three separate POs.

Choose your destination

Every PO asks which location/store the order ships to. Single-location retailers will always see their one store default in; multi-location retailers need to double check this on every PO.

NO AUTO-SUGGEST

Stocky could auto-suggest reorder quantities. Shopify's native PO screen does not have a "suggest" button — you'll add every product and quantity manually. But stay tuned! This feature will be coming to Retail ORBIT very soon!

3 Creating a Purchase Order, Step by Step

1 Go to Products > Purchase Orders

From your Shopify admin left navigation, select Products, then Purchase Orders, then Create Purchase Order.

2 Select or add a supplier

Choose an existing supplier or click Add Supplier to create a new one on the spot. Once selected, any payment terms on file with that supplier populate automatically.

3 Select a destination

Pick which store/location will receive the inventory. Remember: one PO can only ship to one location, so multi-location shops need a separate PO per destination.

4 Add products & variants

Search and add each product — cost and supplier SKU pull in automatically from the product record. Enter the specific variants (color/size/etc.) and adjust quantity for each line.

5 Add PO-level details

Fill in a reference number, additional notes, shipping cost, and tags so your accountant and team have everything they need to track the order.

6 Use tags to fill Stocky gaps

Shopify's native PO doesn't have every field Stocky had (like a dedicated ship-from or cancel date). Consultants recommend using Notes and Tags to capture that information as a workaround.

7 Save (this creates a draft)

Saving at this point creates the PO in Draft status — it's not yet finalized and won't be picked up by reporting or the API layer. Double check everything looks right before moving on.

8 Click "Mark as Ordered"

This finalizes the purchase order, moving it from Draft to Ordered status, and makes it available to link to a transfer.

9 Create the linked transfer

From the finalized PO, click Create Transfer (or link to an existing transfer if one already exists) — this is the record Retail ORBIT will read (see Section 4).

OFFICIAL SHOPIFY REFERENCE

These steps follow Shopify's own Purchase Orders documentation, with Management One's field-tested tips layered in. For Shopify's official walkthrough (with current screenshots), see the Shopify Help Center article "Creating purchase orders" under Products > Inventory > Purchase orders.

4 Linking to a Transfer & Setting Expected Arrival

This is the step clients miss most often — and it's the one that determines whether the order shows up correctly in reporting and budgets.

- **Mark the transfer "in transit."** Once a transfer is ready to ship, move it to In Transit status. This unlocks a few extra fields — tracking number, carrier, and expected arrival date.
- **Always add an expected arrival date.** This is what tells Retail ORBIT which month to budget the order into. A transfer sitting in "In Progress" without a date won't map to the right period.
- **It's OK if the date is in the future.** An October order entered in August will simply show as in transit until its arrival date — that's expected behavior, not an error.
- **Watch transfer status labels:** to be picked up correctly, a transfer needs to say **In Progress** (counts as on-order) or **Transferred** (counts in the inflow section of the plan). **Draft** and **Ready to Ship** (shown in yellow) do not get picked up — if a transfer is stuck on Ready to Ship, click the black **"Mark as In Transit"** button in the top right of the transfer to move it forward. That same button will then read **"Receive Items"** — that's what you'll come back and click once the order actually arrives.

A BLANK EXPECTED ARRIVAL DATE DEFAULTS TO THE CURRENT MONTH

If the expected arrival field is left blank on an in-progress transfer, Retail ORBIT will show that order as on-order in the **current month** rather than leaving it unassigned. This is a common cause of an on-order total that looks unexpectedly high — if a client's on-order for the month looks inflated, check their Shopify transfers for blank expected arrival dates before assuming there's a data problem.

EDITS DON'T SYNC BETWEEN THE TRANSFER AND THE PO

The transfer and its linked PO mostly operate independently — the main thing that connects them is status. If you change a quantity, date, or other detail on the **transfer**, that change does not automatically update the **PO**, and vice versa. If you need the PO to reflect updated pricing or quantities (for your vendor record or cost-checking purposes), you'll need to edit the PO separately, in addition to updating the transfer.

REPORTING RUNS ON TRANSFERS, NOT POs

If a purchase order is created but never linked to (or converted into) a transfer, Retail ORBIT will not see it as on-order. The purchase order alone is just a record — the transfer is what syncs.

Nightly sync reminder: Retail ORBIT pulls Shopify data overnight. If you receive an order today, it may still show "open" in Retail ORBIT until the next day's refresh — that's just timing, not a data problem.

5 Receiving & Checking Costs

The most common complaint from clients: when they open a transfer to receive it, there's no cost information shown. That's expected — Shopify simply doesn't display pricing on the transfer record itself. Here is the recommended process for spot-checking that a vendor charged you correctly.

Recommended receiving process

- › Open the **transfer** record for the order that arrived.
- › Look for the linked **PO chip** in the box below the product list on the transfer (it shows the PO number and status, e.g. "#PO21 Ordered") and click it.
- › This opens a small **cost summary card** right on the transfer screen — no need to leave the page. It shows the **total cost** (product subtotal, taxes, and total) so you can confirm the order total at a glance.
- › To check **individual item costs**, click the **PO number itself** inside that card (it's a link) — this takes you to the full purchase order, where each line item's cost is broken out.
- › Once costs are confirmed, click the **linked transfer number** shown on the right side of the PO (it's also a link) to jump straight back to the transfer and continue receiving as normal.

DON'T CLICK "UNLINK" BY ACCIDENT

That same cost summary card has an **Unlink** option at the bottom. Unlinking disconnects the PO from the transfer, which means you'll lose the ability to jump back and forth between the two and to spot-check cost this way going forward. There's rarely a reason to use it during normal receiving — leave it alone unless a consultant specifically advises unlinking to fix a data issue.

A QUICK WAY TO SPOT-CHECK

The cost card pops up right over the transfer for a fast total-cost check, the PO number inside it is a link to line-item detail, and the PO itself has a linked transfer number that takes you right back — you can bounce between the two without ever searching your PO list.

If you're only using transfers (not linking POs)

Some clients choose to skip the purchase order step entirely and just track everything as transfers — this is fine if you don't need to communicate a formal PO to your vendor, but you lose the ability to easily spot-check cost. Note that cost still appears on Retail ORBIT's on-order report even for transfer-only tracking, so that report can serve as a backup source of truth for pricing.

Once received, what happens to the PO?

The purchase order doesn't disappear — it stays in your records but the linked transfer will show as "Transferred" rather than "In Progress." You can always come back and reference it later to double-check pricing history.

No linked PO to check? See Section 8 for how to use the Retail ORBIT On-Order report to look up cost on migrated Stocky transfers, and to spot-check what's coming in by month.

6 Partial Shipments, Backorders & Cancellations

Partial and short shipments are one of the biggest adjustments coming from Stocky, since Shopify's tools for splitting an order are more limited.

Removing items that aren't coming

There are two different scenarios here, and they use two different mechanisms — it's important not to mix them up.

If some items are coming and some are not (partial)

- 1 Open the transfer and click "Receive Items"**
This is the same screen you'd use for a normal receipt.
- 2 Find the item that's no longer coming**
Use the dropdown next to that line and select "Reject."
- 3 Enter the quantity that's cancelled**
Enter the amount that won't be arriving in the quantity field for that line.
- 4 Leave the rest of the order alone**
Any items still pending should stay unreceived — don't touch those lines.
- 5 Save**
The rejected items disappear from the transfer record entirely, and the remaining pending items stay open and on-order.

NEVER SELECT "CANCEL" FOR A PARTIAL REMOVAL

That same dropdown also has a "Cancel" option — do not use it. Shopify does not currently relay cancelled line items into Retail ORBIT's reporting, so an item marked Cancel will keep showing as on-order even though it's not coming. **Always use "Reject"** instead for a partial removal — this is the one that correctly disappears from the transfer and the on-order report. This may change in a future Shopify update.

If nothing on the order is coming (full cancellation)

Entire transfers may still be cancelled as usual: open the transfer, click **More Actions**, and select **Cancel Transfer**. This full-transfer cancellation is unaffected by the Reject-vs-Cancel distinction above — that distinction only matters when you're removing individual line items from an otherwise-active transfer.

Receiving what does arrive

- **Partial receipts:** When items physically arrive, open the transfer and choose Receive Items. You can Accept All, Reject All, or accept/reject a partial quantity line by line — enter how many actually arrived (or are cancelled) and Shopify will stock and fulfill or remove just that amount.
- **Accepted quantities post to inventory automatically.** Whatever you accept on a line is immediately added to that product's on-hand count at the destination location — no manual inventory adjustment needed.

- **Reject does double duty.** The same Reject option is used both for genuine returns-to-vendor (an item arrived damaged or wrong and is being sent back) and for items that never shipped at all and are being removed from the order — either way, Reject is the status that correctly clears the item from the transfer and the on-order report.

A note on cancellations

If an item is confirmed as not shipping, reject it (or cancel the full transfer if nothing on it is coming) rather than leaving it open indefinitely — open transfers that are never coming will inflate your on-order numbers and distort budgets.

Received history stays put: anything already received and showing "Transferred" should be left alone — it's your historical record. Only reject or cancel items that never arrived and never will.

KEEP ON-ORDER CLEAN

A recurring theme across client calls: stale or duplicate transfers (especially ones left over from a Stocky migration) will throw off on-order totals and OTB. Periodically review open transfers and cancel or delete anything that's outdated.

7 Migrated Stocky Orders: What to Know

If your store recently moved off Stocky, any open orders that migrated over came in as **transfer records only** — **not as purchase orders**. This is purely a limitation of the migration and Shopify's current capabilities, and it creates a temporary gap in cost visibility for those specific orders.

What this means in practice

- Migrated transfers won't have a linked PO, so you can't click through to check pricing the normal way.
- As a temporary workaround, use Retail ORBIT's on-order report to see SKU-level unit cost for those migrated items while they work through the pipeline.
- Once all migrated transfers have been fully received, you'll be working entirely off new, properly linked POs going forward and can stop using the workaround.
- Watch for duplicate transfers if a store received an order in Stocky just before or after its migration date — that same order may show up twice (once from Stocky history, once as a new Shopify entry) and the duplicate should be deleted.

If you're mid-migration right now

Confirm your exact migration date with your consultant. Orders placed *before* that date typically stay in Stocky through their natural receiving cycle; anything ordered *after* the date should be entered directly into Shopify as a new PO so it links to a transfer correctly the first time.

EXPECT A LEARNING CURVE, NOT A DEAD END

Every consultant call referenced in this guide includes some version of the same message: the new system takes more clicks than Stocky did, but it is workable, and Shopify continues to roll out improvements to the PO experience on a regular cadence.

8 Exporting, Reporting & the Retail ORBIT On-Order Report

Shopify doesn't yet have a built-in way to answer a simple question like "how many dresses do I have coming in September?" That gap is exactly what the **On-Order report** inside the Retail ORBIT app (installed in Shopify for every Management One client) is built to solve. It reads directly from your Shopify purchase orders and transfers, so it's the single best place to spot-check what's coming and when.

What you can and can't export

- **Purchase orders can be exported as a PDF** — useful for sending a formal order confirmation to a vendor or for your accountant's records.
- **Transfer records cannot be exported**, and there is currently no native Excel/CSV export for POs directly out of Shopify.
- The Retail ORBIT On-Order report, however, **can be exported to CSV** — this is the best way to get PO/receiving data into a spreadsheet.

Finding cost on a migrated Stocky order (no linked PO)

Orders that migrated over from Stocky came in as transfers only, with no purchase order to click into for pricing. The On-Order report is the workaround: it pulls cost data straight from Shopify even when a transfer has no linked PO. To look one up:

- › Open the **Retail ORBIT app** inside Shopify (this is a different login/app than retailorbit.com — team members log in with their Retail ORBIT credentials).
- › Go to **On Order** in the left-hand navigation.
- › Use the search/filter bar to look up the specific **transfer number** you're receiving (for example, T0145) — this is the same number shown on the transfer record in Shopify.
- › Click into the result to see the **total order cost**.
- › For SKU-level pricing, click through to **Full Details / Expanded View** to see **unit cost** by variant (color, size, etc.) — this is the level of detail you'd normally get from a linked PO.

THIS IS A TEMPORARY WORKAROUND

Once all migrated Stocky transfers have been received and you're working entirely off new POs entered directly in Shopify, you won't need this extra step — you'll be able to toggle straight from the transfer to its linked PO for pricing, the same way you would with any newly created order.

Spot-checking what's coming and when

Beyond migrated orders, the On-Order report is useful anytime you want a month-by-month view of inbound inventory — something Shopify's native purchase order screens don't offer.

- **Filter by estimated arrival date range** (e.g., 9/1–9/30) to see everything booked to arrive in a given month, along with a running **cost total** for that window — handy for checking that on-order matches what's reflected in your open-to-buy plan.
- **Filter by product type** to isolate a category — for example, pulling every transfer that contains jackets to see which vendors and styles make up that on-order total, and whether the mix needs rebalancing toward better-margin lines.

- Additional filters include **store location, tag, supplier, and transfer status** (in progress vs. transferred), so you can narrow down to exactly the slice you need before a client meeting or before market.
- Remember the data **updates nightly**. If dates or receiving status look off the same day something changed in Shopify, check back after the overnight sync before troubleshooting further.

How Retail ORBIT uses this data

- Retail ORBIT reads **transfers** (not standalone POs) each night to build on-order and receiving data.
- The CSV export includes PO number, supplier, product type, received vs. on-order quantity, and cost — useful for accountants who need partial-shipment detail or a SKU-level view of what came in.
- A shipping-date range filter is based on the **expected arrival date**, since Shopify doesn't have a separate ship-date field — another reason arrival dates matter so much (see Section 4).

No cancel date or ship date field? Use tags.

Shopify doesn't have dedicated cancel-date or ship-date fields on a transfer — the **only** date field is estimated arrival date. A couple of ways consultants work around this:

- **Use the expected arrival date itself as a soft cancel date.** If a vendor's ship window is, say, 9/1–9/30, enter 9/30 as the expected arrival and treat that as the last date they should ship by.
- **Or add a tag to the transfer** that represents your cancel date (e.g., an **8-31-26** style tag). You can then filter the on-order report by that tag to pull every order that's due by that date and should be followed up on if it hasn't shipped.
- **Tags go on the transfer, not the purchase order** — the on-order report only reads data from transfers, so a tag added only to the PO won't show up when filtering the report.
- **Order tags are separate from product tags.** This trips people up: tagging a transfer/order has nothing to do with the tags on a product listing elsewhere in Shopify.
- **Order tags are also useful for grouping** — for example, tagging every order tied to a specific collection launch so you can pull all of them at once and confirm everything will arrive in time.
- **Notes are for staff communication only.** You can leave notes in a transfer's timeline (e.g., "called vendor, shipping Tuesday") for your team to see, but notes are plain text and are not read into the on-order report — only tags are filterable there.

More in the report itself

- The CSV export and report view include a **Transfer Link ID** column/link that jumps straight from a row in the on-order report to that transfer inside the Shopify admin, so you can go back and forth easily.
- The Retail ORBIT app also has a short **tutorial video** linked directly from the on-order report, plus an **Education section** with a glossary of metrics/formulas — a good resource to hand a client who's newer to retail terminology while their first plan is being built.

PO MANAGEMENT VS. OPEN-TO-BUY SETUP

If you're a newer client, don't feel behind if PO tracking isn't dialed in yet — most onboarding plans deliberately sequence the sales plan and open-to-buy setup first, then move into purchase-order management once the planning foundation is in place.

9

Quick-Reference Checklist & FAQ

Checklist: setting up a clean PO

- ✓ Product already created in Shopify before adding it to a PO
- ✓ Supplier added/selected on the Shopify PO supplier list (separate from your vendor tags)
- ✓ One supplier per purchase order
- ✓ Correct destination/location selected
- ✓ PO linked to (or converted into) a transfer
- ✓ Transfer moved to In Transit with an expected arrival date entered
- ✓ Notes/tags used to capture anything Shopify's fields don't cover (ship-from, cancel date, etc.)
- ✓ On receipt: cost checked via the linked PO before finishing the receive
- ✓ For migrated/unlinked transfers: cost checked via the Retail ORBIT On-Order report instead
- ✓ Items no longer coming rejected (not cancelled) instead of left open indefinitely

FAQ

Why doesn't my transfer show a price?

Shopify doesn't display cost on the transfer record itself by design. Click the linked PO number shown on the transfer to see the subtotal and line-item costs.

Can I export all my on-order info to Excel?

Not natively yet. POs export to PDF only. For Excel/CSV, use Retail ORBIT's on-order report.

Do I have to create a PO every time, or can I just use transfers?

You can track with transfers alone, but you'll lose the ability to quickly verify vendor pricing and won't have a clean, exportable vendor-facing document. Creating the PO first is the recommended path.

What happened to my open Stocky orders?

They migrated in as transfer records without a linked PO. Use the Retail ORBIT on-order report to see cost on those specific items until they're fully received out.

My transfer says "Ready to Ship" — why can't I receive it?

Ready to Ship is a status step before receiving becomes available. Open the transfer and click the black "Mark as In Transit" button in the top right. Once you do, that same button changes to "Receive Items" — that's what you'll click when you come back to receive the order.

Does it matter if an order's expected arrival date is months away?

No — that's expected. The transfer will simply sit as in-transit until that date, and Retail ORBIT will budget it into the correct future month.

How do I check cost on an order that migrated over from Stocky?

Open the Retail ORBIT app in Shopify, go to On Order, and search the transfer number. Click in for the order total, or Full Details/Expanded View for SKU-level unit cost — no linked PO needed.

How can I see everything arriving in a given month before it shows up in Shopify?

Use the On-Order report's estimated arrival date filter (e.g., 9/1–9/30) to pull a cost total and line-item list for that window — a report Shopify doesn't offer natively.

Questions about your store's specific setup? Reach out to your Management One consultant — this guide is meant as a companion to, not a replacement for, one-on-one coaching.

Still confused or have additional questions? Book time directly with Melanie Melton:
meetings.hubspot.com/melanie-melton

