

FREE SHELF AVAILABILITY TEMPLATE

Shelf Availability Checklist

Use this 60-point checklist to verify shelf stock, facings, hidden backroom inventory, system accuracy, replenishment, receiving, planogram capacity, labels, out-of-stock recovery, root causes, corrective actions, and final availability status.

Store / location

Review date

Category / zone

Reviewer / inventory owner

1. Availability setup, category scope, priority SKUs, targets, ownership, and previous gaps

- 1** Confirm the store, review date, reviewer, department or category, operating period, shelf zones, and product ranges included in the availability check.

SHELF AVAILABILITY

REVIEWER

Enter

DATE / TIME

Enter

SIGN-OFF

Sign

● Execution tip: Start with the products that matter most to customers and sales. Core assortment, advertised items, bestsellers, and essential products should receive deeper sampling.

- 2** Identify priority SKUs such as bestsellers, advertised products, core assortment, new launches, seasonal lines, essentials, and high-demand items requiring tighter availability control.

CRITICAL

SHELF AVAILABILITY

SKU / Area

Shelf

Backroom

Owner

Action

● Execution tip: Start with the products that matter most to customers and sales. Core assortment, advertised items, bestsellers, and essential products should receive deeper sampling.

- 3** Confirm the current product list, planogram or shelf map, replenishment priorities, minimum shelf quantity, case-pack information, and stock availability targets are available.

SHELF AVAILABILITY

SKU / Area

Shelf

Backroom

Owner

Action

● Execution tip: Start with the products that matter most to customers and sales. Core assortment, advertised items, bestsellers, and essential products should receive deeper sampling.

- 4** Review recent out-of-stock reports, lost-sales indicators, negative inventory, stock adjustments, receiving discrepancies, delivery delays, and repeated availability failures.

CRITICAL

SHELF AVAILABILITY

SYSTEM QTY

Enter

PHYSICAL QTY

Enter

VARIANCE

Record

● Execution tip: Start with the products that matter most to customers and sales. Core assortment, advertised items, bestsellers, and essential products should receive deeper sampling.

- 5** Define critical availability failures for the location, such as zero stock on an advertised hero item, repeated phantom inventory, blocked replenishment, or unavailable essential product.

CRITICAL

SHELF AVAILABILITY

Available

Needs action

Critical

PHOTO

Add

● Execution tip: Start with the products that matter most to customers and sales. Core assortment, advertised items, bestsellers, and essential products should receive deeper sampling.

- 6** Assign ownership for shelf replenishment, stockroom checks, inventory accuracy, receiving, supplier follow-up, planogram execution, pricing labels, and corrective-action closure.

SHELF AVAILABILITY

SKU / Area

Shelf

Backroom

Owner

Action

● Execution tip: Start with the products that matter most to customers and sales. Core assortment, advertised items, bestsellers, and essential products should receive deeper sampling.

2. Shelf stock presence, facings, minimum display quantity, gaps, and customer visibility

- 7 Check priority products are physically present on the correct shelf, rack, peg, tray, counter, or display location during the review.**

SHELF AVAILABILITY

CRITICAL

Available

Needs action

Critical

PHOTO

Add

● Execution tip: A shelf gap is not always a true stockout. Check whether stock is hidden, misplaced, blocked, or waiting in the stockroom before classifying the root cause.

- 8 Verify the required number of facings, display units, or minimum shelf quantity is maintained for sampled priority SKUs where a standard is defined.**

SHELF AVAILABILITY

CRITICAL

Available

Low stock

Out of stock

N/A

● Execution tip: A shelf gap is not always a true stockout. Check whether stock is hidden, misplaced, blocked, or waiting in the stockroom before classifying the root cause.

- 9 Check visible shelf gaps are identified quickly and are not left empty when sellable stock is available elsewhere in the store.**

SHELF AVAILABILITY

CRITICAL

Available

Low stock

Out of stock

N/A

● Execution tip: A shelf gap is not always a true stockout. Check whether stock is hidden, misplaced, blocked, or waiting in the stockroom before classifying the root cause.

- 10 Confirm products are faced forward, easy to see, accessible to customers, and not hidden behind other items, misplaced stock, display props, or shelf-edge material.**

SHELF AVAILABILITY

Available

Low stock

Out of stock

N/A

● Execution tip: A shelf gap is not always a true stockout. Check whether stock is hidden, misplaced, blocked, or waiting in the stockroom before classifying the root cause.

- 11 Verify empty spaces are not incorrectly filled with unrelated products in a way that hides the real out-of-stock condition or creates customer confusion.**

SHELF AVAILABILITY

Available

Low stock

Out of stock

N/A

● Execution tip: A shelf gap is not always a true stockout. Check whether stock is hidden, misplaced, blocked, or waiting in the stockroom before classifying the root cause.

- 12 Record empty facings, partial gaps, hidden stock, wrong shelf position, insufficient display quantity, or other conditions reducing on-shelf availability.**

SHELF AVAILABILITY

CRITICAL

Available

Needs action

Critical

PHOTO

Add

● Execution tip: A shelf gap is not always a true stockout. Check whether stock is hidden, misplaced, blocked, or waiting in the stockroom before classifying the root cause.

3. Backroom stock, stockroom organization, replenishment access, and hidden inventory

- 13 Check whether products missing from the shelf are physically available in the stockroom, cage, overhead storage, receiving area, or other approved holding location.**

SHELF AVAILABILITY

CRITICAL

Available

Needs action

Critical

PHOTO

Add

● Execution tip: Backroom organization directly affects shelf availability. If employees cannot find stock quickly, positive inventory can still behave like an out-of-stock.

- 14 Verify priority replenishment stock is easy to find and not buried behind unrelated cartons, mixed pallets, unlabelled boxes, or poorly organized storage.**

SHELF AVAILABILITY

CRITICAL

SYSTEM QTY

Enter

PHYSICAL QTY

Enter

VARIANCE

Record

● Execution tip: Backroom organization directly affects shelf availability. If employees cannot find stock quickly, positive inventory can still behave like an out-of-stock.

- 15 Confirm stockroom locations, shelf labels, bin references, category zones, and storage rules support fast retrieval of high-demand items.**

SHELF AVAILABILITY

CRITICAL

SYSTEM QTY

Enter

PHYSICAL QTY

Enter

VARIANCE

Record

● Execution tip: Backroom organization directly affects shelf availability. If employees cannot find stock quickly, positive inventory can still behave like an out-of-stock.

- 16 Check sellable stock is not incorrectly held in damaged, quarantine, returns, receiving, or transfer zones without the correct status.**

SHELF AVAILABILITY

CRITICAL

Available

Low stock

Out of stock

N/A

● Execution tip: Backroom organization directly affects shelf availability. If employees cannot find stock quickly, positive inventory can still behave like an out-of-stock.

- 17 Verify excess stock, reserve stock, promotional stock, and launch inventory are positioned so replenishment teams can access them when required.**

SHELF AVAILABILITY

CRITICAL

Available

Low stock

Out of stock

N/A

● Execution tip: Backroom organization directly affects shelf availability. If employees cannot find stock quickly, positive inventory can still behave like an out-of-stock.

- 18 Record shelf gaps caused by hidden backroom stock, poor stockroom organization, misplaced cartons, blocked access, or incorrect stock status.**

SHELF AVAILABILITY

CRITICAL

Available

Needs action

Critical

PHOTO

Add

● Execution tip: Backroom organization directly affects shelf availability. If employees cannot find stock quickly, positive inventory can still behave like an out-of-stock.

4. System stock, inventory accuracy, phantom stock, negative stock, and adjustment controls

19 Compare physical shelf and backroom stock for sampled SKUs against the system stock-on-hand quantity.

SHELF AVAILABILITY

CRITICAL

SYSTEM QTY

Enter

PHYSICAL QTY

Enter

VARIANCE

Record

● Execution tip: Compare physical and system stock together. Repeated positive stock with no product found is a strong indicator of phantom inventory or transaction-control issues.

20 Investigate cases where the system shows positive stock but no sellable units can be found on the shelf or in approved storage.

SHELF AVAILABILITY

CRITICAL

SYSTEM QTY

Enter

PHYSICAL QTY

Enter

VARIANCE

Record

● Execution tip: Compare physical and system stock together. Repeated positive stock with no product found is a strong indicator of phantom inventory or transaction-control issues.

21 Review negative inventory, zero stock with physical units present, repeated stock corrections, and unusual quantity changes for affected products.

SHELF AVAILABILITY

CRITICAL

SYSTEM QTY

Enter

PHYSICAL QTY

Enter

VARIANCE

Record

● Execution tip: Compare physical and system stock together. Repeated positive stock with no product found is a strong indicator of phantom inventory or transaction-control issues.

22 Check recent adjustments, write-offs, damages, transfers, returns, cycle counts, receiving corrections, and other inventory movements that may explain the variance.

SHELF AVAILABILITY

CRITICAL

Available

Low stock

Out of stock

N/A

● Execution tip: Compare physical and system stock together. Repeated positive stock with no product found is a strong indicator of phantom inventory or transaction-control issues.

23 Confirm manual stock adjustments require the correct reason, evidence, and approval according to the store's inventory-control process.

SHELF AVAILABILITY

CRITICAL

Available

Low stock

Out of stock

N/A

● Execution tip: Compare physical and system stock together. Repeated positive stock with no product found is a strong indicator of phantom inventory or transaction-control issues.

24 Record phantom inventory, unexplained variance, repeated adjustment patterns, inaccurate stock status, or other system issues affecting availability decisions.

SHELF AVAILABILITY

CRITICAL

SKU / Area

Shelf

Backroom

Owner

Action

● Execution tip: Compare physical and system stock together. Repeated positive stock with no product found is a strong indicator of phantom inventory or transaction-control issues.

5. Replenishment process, triggers, frequency, task ownership, timing, and execution

- 25 Verify replenishment checks are completed at the required frequency for the store, category, trading period, and product demand pattern.**

SHELF AVAILABILITY

CRITICAL

SYSTEM QTY

Enter

PHYSICAL QTY

Enter

VARIANCE

Record

● Execution tip: Measure replenishment response time on priority items. Availability depends on how quickly the team moves from identifying a gap to restoring the shelf.

- 26 Confirm replenishment triggers such as minimum shelf level, system alert, manual gap scan, sales velocity, or scheduled floor walk are being used as intended.**

SHELF AVAILABILITY

CRITICAL

SYSTEM QTY

Enter

PHYSICAL QTY

Enter

VARIANCE

Record

● Execution tip: Measure replenishment response time on priority items. Availability depends on how quickly the team moves from identifying a gap to restoring the shelf.

- 27 Check assigned employees understand which categories, shelves, and priority SKUs they own during the shift.**

SHELF AVAILABILITY

CRITICAL

SYSTEM QTY

Enter

PHYSICAL QTY

Enter

VARIANCE

Record

● Execution tip: Measure replenishment response time on priority items. Availability depends on how quickly the team moves from identifying a gap to restoring the shelf.

- 28 Measure or estimate the time between identifying a shelf gap and replenishing the product where the store has a response-time expectation.**

SHELF AVAILABILITY

CRITICAL

Available

Low stock

Out of stock

N/A

● Execution tip: Measure replenishment response time on priority items. Availability depends on how quickly the team moves from identifying a gap to restoring the shelf.

- 29 Verify replenishment tasks are not repeatedly delayed by competing work, unclear ownership, poor stockroom access, or missing equipment.**

SHELF AVAILABILITY

CRITICAL

Available

Low stock

Out of stock

N/A

● Execution tip: Measure replenishment response time on priority items. Availability depends on how quickly the team moves from identifying a gap to restoring the shelf.

- 30 Record missed replenishment rounds, slow response, unassigned gaps, repeated task delays, or other execution failures reducing shelf availability.**

SHELF AVAILABILITY

CRITICAL

SKU / Area

Shelf

Backroom

Owner

Action

● Execution tip: Measure replenishment response time on priority items. Availability depends on how quickly the team moves from identifying a gap to restoring the shelf.

6. Receiving, deliveries, supplier fill, transfer stock, and inbound availability risks

- 31 Verify recent deliveries for sampled priority SKUs were received against the correct purchase order, transfer, or delivery documentation.**

SHELF AVAILABILITY

CRITICAL

Available

Needs action

Critical

PHOTO

Add

● Execution tip: Follow one delayed or short delivery through receiving, stock status, replenishment, and shelf impact. This reveals where inbound issues become customer-facing gaps.

- 32 Check shortages, damaged cartons, incorrect quantities, missing products, late deliveries, or other inbound discrepancies are recorded and escalated promptly.**

SHELF AVAILABILITY

CRITICAL

SYSTEM QTY

Enter

PHYSICAL QTY

Enter

VARIANCE

Record

● Execution tip: Follow one delayed or short delivery through receiving, stock status, replenishment, and shelf impact. This reveals where inbound issues become customer-facing gaps.

- 33 Confirm newly received priority stock is moved from receiving to the correct stockroom or selling-floor location without unnecessary delay.**

SHELF AVAILABILITY

CRITICAL

SYSTEM QTY

Enter

PHYSICAL QTY

Enter

VARIANCE

Record

● Execution tip: Follow one delayed or short delivery through receiving, stock status, replenishment, and shelf impact. This reveals where inbound issues become customer-facing gaps.

- 34 Review supplier fill rate, partial deliveries, delayed purchase orders, cancelled items, or repeated short shipments affecting current shelf availability where data is available.**

SHELF AVAILABILITY

CRITICAL

Available

Low stock

Out of stock

N/A

● Execution tip: Follow one delayed or short delivery through receiving, stock status, replenishment, and shelf impact. This reveals where inbound issues become customer-facing gaps.

- 35 Check inter-store transfers, emergency replenishment, substitute supply, or other recovery actions are tracked when normal supply cannot support demand.**

SHELF AVAILABILITY

CRITICAL

Available

Low stock

Out of stock

N/A

● Execution tip: Follow one delayed or short delivery through receiving, stock status, replenishment, and shelf impact. This reveals where inbound issues become customer-facing gaps.

- 36 Record receiving backlog, supplier shortage, transfer delay, unprocessed delivery, or other inbound issue directly affecting customer availability.**

SHELF AVAILABILITY

CRITICAL

Available

Needs action

Critical

PHOTO

Add

● Execution tip: Follow one delayed or short delivery through receiving, stock status, replenishment, and shelf impact. This reveals where inbound issues become customer-facing gaps.

7. Planogram location, assortment accuracy, product placement, substitutions, and shelf capacity

37 Verify each sampled priority SKU is assigned to the correct shelf, fixture, bay, rack, or planogram position.

SHELF AVAILABILITY

CRITICAL

Available

Needs action

Critical

PHOTO

Add

● Execution tip: Shelf capacity should reflect demand. Repeated stockouts on the same product may indicate the allocated space is too small even when replenishment is working.

38 Check active assortment matches the approved range for the store format and that discontinued, delisted, or unauthorized products are not occupying required space.

SHELF AVAILABILITY

CRITICAL

Available

Low stock

Out of stock

N/A

● Execution tip: Shelf capacity should reflect demand. Repeated stockouts on the same product may indicate the allocated space is too small even when replenishment is working.

39 Confirm shelf capacity, facings, product dimensions, case-pack size, and replenishment frequency are practical for the product's current demand.

SHELF AVAILABILITY

CRITICAL

Available

Low stock

Out of stock

N/A

● Execution tip: Shelf capacity should reflect demand. Repeated stockouts on the same product may indicate the allocated space is too small even when replenishment is working.

40 Verify approved substitutions or alternative placements are used when the primary item is unavailable and are clearly distinguished from permanent planogram changes.

SHELF AVAILABILITY

CRITICAL

Available

Low stock

Out of stock

N/A

● Execution tip: Shelf capacity should reflect demand. Repeated stockouts on the same product may indicate the allocated space is too small even when replenishment is working.

41 Check local assortment changes, additional products, or overflow displays do not reduce space needed for priority SKUs or create repeated stockouts.

SHELF AVAILABILITY

CRITICAL

Available

Low stock

Out of stock

N/A

● Execution tip: Shelf capacity should reflect demand. Repeated stockouts on the same product may indicate the allocated space is too small even when replenishment is working.

42 Record wrong planogram location, insufficient shelf capacity, assortment mismatch, unauthorized substitution, or placement conditions contributing to availability loss.

SHELF AVAILABILITY

CRITICAL

Available

Needs action

Critical

PHOTO

Add

● Execution tip: Shelf capacity should reflect demand. Repeated stockouts on the same product may indicate the allocated space is too small even when replenishment is working.

8. Price labels, shelf-edge information, product identification, promotional items, and customer findability

- 43 Verify each sampled product has the correct shelf label, price ticket, barcode reference, product description, or other customer-facing identification required by the store.**

SHELF AVAILABILITY

CRITICAL

Available

Needs action

Critical

PHOTO

Add

● Execution tip: Correct shelf labels quickly. Employees and customers both rely on accurate product identification to find, replenish, and purchase the right item.

- 44 Check labels are aligned with the correct product and do not create confusion about which price, promotion, size, or variant applies.**

SHELF AVAILABILITY

CRITICAL

Available

Low stock

Out of stock

N/A

● Execution tip: Correct shelf labels quickly. Employees and customers both rely on accurate product identification to find, replenish, and purchase the right item.

- 45 Confirm promotional products and advertised items are clearly identifiable on the shelf and supported by the correct promotional communication.**

SHELF AVAILABILITY

CRITICAL

Available

Low stock

Out of stock

N/A

● Execution tip: Correct shelf labels quickly. Employees and customers both rely on accurate product identification to find, replenish, and purchase the right item.

- 46 Check missing, damaged, outdated, duplicate, or misplaced labels are corrected so customers and employees can identify the product location quickly.**

SHELF AVAILABILITY

CRITICAL

Available

Low stock

Out of stock

N/A

● Execution tip: Correct shelf labels quickly. Employees and customers both rely on accurate product identification to find, replenish, and purchase the right item.

- 47 Verify products moved to temporary or secondary locations remain easy to find and are supported by clear location or promotional communication where needed.**

SHELF AVAILABILITY

CRITICAL

Available

Low stock

Out of stock

N/A

● Execution tip: Correct shelf labels quickly. Employees and customers both rely on accurate product identification to find, replenish, and purchase the right item.

- 48 Record label mismatch, missing price information, poor product identification, hidden promotional stock, or customer-findability gaps linked to availability.**

SHELF AVAILABILITY

CRITICAL

Available

Needs action

Critical

PHOTO

Add

● Execution tip: Correct shelf labels quickly. Employees and customers both rely on accurate product identification to find, replenish, and purchase the right item.

9. Out-of-stock response, root cause, substitute options, customer communication, and recovery

- 49 Identify the root cause for each sampled out-of-stock condition, such as no inventory, phantom stock, delayed replenishment, receiving issue, planogram error, supplier shortage, or misplacement.**

SHELF AVAILABILITY

CRITICAL

Available

Needs action

Critical

PHOTO

Add

● Execution tip: Record the real root cause of each out-of-stock. Replenishing one shelf is useful, but fixing recurring availability requires knowing why the gap happened.

- 50 Check employees know the approved action when a customer asks for an unavailable item, including stock lookup, backroom check, alternative product, other-location search, or order option where applicable.**

SHELF AVAILABILITY

CRITICAL

Available

Low stock

Out of stock

N/A

● Execution tip: Record the real root cause of each out-of-stock. Replenishing one shelf is useful, but fixing recurring availability requires knowing why the gap happened.

- 51 Verify approved substitutes, alternatives, pack sizes, variants, or comparable products are available and communicated clearly when the primary SKU is unavailable.**

SHELF AVAILABILITY

CRITICAL

Available

Low stock

Out of stock

N/A

● Execution tip: Record the real root cause of each out-of-stock. Replenishing one shelf is useful, but fixing recurring availability requires knowing why the gap happened.

- 52 Confirm advertised or promoted out-of-stock items receive the required escalation, customer communication, replenishment priority, or campaign action.**

SHELF AVAILABILITY

CRITICAL

Available

Low stock

Out of stock

N/A

● Execution tip: Record the real root cause of each out-of-stock. Replenishing one shelf is useful, but fixing recurring availability requires knowing why the gap happened.

- 53 Check recurring stockouts trigger follow-up on demand forecast, shelf capacity, replenishment frequency, supplier performance, or inventory accuracy rather than repeated temporary fixes.**

SHELF AVAILABILITY

CRITICAL

Available

Low stock

Out of stock

N/A

● Execution tip: Record the real root cause of each out-of-stock. Replenishing one shelf is useful, but fixing recurring availability requires knowing why the gap happened.

- 54 Record unresolved stockouts, weak customer recovery, repeated availability loss, unclear root cause, or lack of escalation for high-impact products.**

SHELF AVAILABILITY

CRITICAL

Available

Needs action

Critical

PHOTO

Add

● Execution tip: Record the real root cause of each out-of-stock. Replenishing one shelf is useful, but fixing recurring availability requires knowing why the gap happened.

10. Evidence, availability score, corrective actions, trend review, management follow-up, and sign-off

- 55** Capture clear evidence for shelf gaps and corrective actions, including shelf photos, stockroom proof, system stock, delivery status, labels, planogram position, or replenished-state images as required.

SHELF AVAILABILITY

Available

Needs action

Critical

PHOTO

Add

CRITICAL

● Execution tip: Trend repeated gaps by SKU, category, daypart, store, supplier, and root cause. This helps separate one-off misses from systemic availability problems.

- 56** Score availability consistently across priority SKUs, categories, shelves, or departments and distinguish temporary minor gaps from repeated or critical out-of-stock conditions.

SHELF AVAILABILITY

Available

Low stock

Out of stock

N/A

CRITICAL

● Execution tip: Trend repeated gaps by SKU, category, daypart, store, supplier, and root cause. This helps separate one-off misses from systemic availability problems.

- 57** Record every failed check with the product, shelf location, system quantity, physical quantity, likely root cause, customer impact, and immediate action taken.

SHELF AVAILABILITY

Available

Low stock

Out of stock

N/A

CRITICAL

● Execution tip: Trend repeated gaps by SKU, category, daypart, store, supplier, and root cause. This helps separate one-off misses from systemic availability problems.

- 58** Assign each availability gap to a named store, inventory, replenishment, receiving, supply, pricing, or operations owner with priority, due time, and evidence requirement.

SHELF AVAILABILITY

Available

Low stock

Out of stock

N/A

CRITICAL

● Execution tip: Trend repeated gaps by SKU, category, daypart, store, supplier, and root cause. This helps separate one-off misses from systemic availability problems.

- 59** Verify closure using replenished shelf photos, corrected inventory, processed delivery, fixed label, updated planogram, supplier recovery, or other objective proof.

SHELF AVAILABILITY

Available

Low stock

Out of stock

N/A

CRITICAL

● Execution tip: Trend repeated gaps by SKU, category, daypart, store, supplier, and root cause. This helps separate one-off misses from systemic availability problems.

- 60** Record the final shelf-availability score, critical out-of-stocks, repeat problem SKUs, open actions, next review date, reviewer, store manager, inventory owner, date, time, and sign-off.

SHELF AVAILABILITY

Available

Needs action

Critical

PHOTO

Add

CRITICAL

● Execution tip: Trend repeated gaps by SKU, category, daypart, store, supplier, and root cause. This helps separate one-off misses from systemic availability problems.

RUN THIS CHECKLIST DIGITALLY

Keep priority products available where customers actually look for them

Use Taqtics to schedule availability checks, capture SKU-level evidence, identify root causes, assign replenishment actions, verify recovery, and compare out-of-stock trends across every store.