Practical Stock Planner – which data-export guide do I need?

Practical Stock Planner – Time-phased stock planning. Start here.

Practical Stock Planner needs **7 input files**. Each short guide covers **one system and one file**, and is named *System_File* (e.g. `Xero_SOH.pdf`). **Take each kind of data from the system where it really lives** – for example products and stock from Shopify, suppliers and purchase orders from Xero. You can mix systems, as long as SKUs match exactly in every file (case, spaces and leading zeros count). Work through the files in the order below.

#	File	Type	What it holds	Guides (pick one)
1	**SKU Details**	Master	Your product list	Shopify · WooCommerce · Xero · QuickBooks · or Excel
2	**SOH**	Transactional	Stock on hand today	Shopify · WooCommerce · Xero · QuickBooks · or Excel
3	**Open_SO**	Transactional	Customer orders not yet shipped	Shopify · WooCommerce · or Excel
4	**Open_Supply**	Transactional	Purchase orders not yet received	Xero · QuickBooks · or Excel
5	**Supplier_Details**	Master	Your supplier list	Xero · QuickBooks · or Excel
6	**SKU_Supplier_Details**	Master	Buying terms per SKU (supplier, lead time, pack, MOQ, price)	Excel
7	**Forecast**	Forecast	Expected sales per SKU per week	Excel

Master data (SKU Details, Supplier_Details, SKU_Supplier_Details) is set up once and only changes when you add or change a SKU or supplier. **Transactional data** (SOH, Open_SO, Open_Supply) changes every day, so export it fresh each time you plan. Update the **Forecast** whenever you review it.

"Excel" in rows 1–5 means **Excel templates** – one guide that covers typing any file straight into its template.

- **Products in two systems** (e.g. Shopify and Xero): pick one as your master source for SKU Details and use it every time, so codes and descriptions stay consistent.
- **Xero / QuickBooks Online:** use the Xero stock on hand guide or the QuickBooks stock on hand guide only if you track stock there. If your shop holds your stock, take SOH from the shop.
- **Orders kept in Xero or QuickBooks Online** (quotes, draft invoices, sales orders): neither exports an order list – type them into the Open_SO template.
- **MYOB:** MYOB guides are on the way. Until then, use Excel templates.

Rules for every file

- **Download the 7 templates** from Practical Stock Planner. Open **Load Data**, then open **Templates** in the sidebar: `template_SKU_Details.csv`, `template_SOH.csv`, `template_Open_SO.csv`, `template_Open_Supply.csv`, `template_Supplier_Details.csv`, `template_SKU_Supplier_Details.csv` and `template_Forecast.csv`. Upload **CSV files only** – one CSV file per input file (comma or semicolon separated). Keep each template's **header row** exactly as it is. In Excel, save with *File › Save As › CSV UTF-8 (Comma delimited)*.
- **Keep leading zeros in SKUs:** format the SKU column as *Text* before you type or paste SKUs, then Save As CSV UTF-8. Opening a CSV directly in Excel can strip leading zeros – import it via *Data › From Text/CSV* and set the SKU column to *Text*. In Google Sheets: select the SKU column and choose *Format › Number › Plain text* before you type or paste, then save with *File › Download › Comma-separated values (.csv)*.
- **If the upload is refused:** a workbook or other non-CSV file gets “Couldn't use” followed by the file name, then “Please upload a CSV file. Practical Stock Planner imports CSV only.” Save it with *File › Save As › CSV UTF-8 (Comma delimited)* and upload the `.csv`. A file that is not UTF-8 gets “Couldn't read” followed by the file name, then “Save it as UTF-8 or UTF-8 with BOM and try again. In your spreadsheet, choose Save As > CSV UTF-8.” Save it again as CSV UTF-8 and upload the `.csv`.
- **Google Sheets:** save each file with *File › Download › Comma-separated values (.csv)*.
- **Date format:** on the Load Data page, set **Date format in your files** to **Day/Month/Year** (default) or **Month/Day/Year** (US-style) to match your files. Dates like 2026-10-05, 2026/10/05 and 13-Apr-2026 always work. Change it? Upload the file again.
- **All 7 files are needed.** Open sales orders and open supply may be a header row only, when none are open. The other five files need at least one data row. Stock on hand with nothing in the warehouse is a row with quantity 0. Anything else you cannot fill in: email support@practicalsupplychainplanning.com.
- **Single units** everywhere (UoM = unit of measure, e.g. `EA` = each), except the buying terms in SKU_Supplier_Details (e.g. `CTN` = carton).
- **Export everything on one day** and make it the *Plan Start Date*. Weeks start Monday; rows for the same SKU and date are added up.

Note. Some steps in these guides were checked against the vendor’s help pages, not in a live account. If a screen looks different, email support@practicalsupplychainplanning.com.