Excel → Practical Stock Planner: File 7 – Forecast (expected weekly demand)

Practical Stock Planner – Time-phased stock planning. One short guide for one file. No IT skills needed – just Excel and a sales report from your system.

What this file is: how many units of each SKU you expect to sell each week. Columns: `SKU`, `Forecast Qty`, `Week Starting Date`. Shopify, WooCommerce, Xero and QuickBooks Online don't forecast, so you build a simple forecast in Excel from recent sales.

Before you start

1. **Download the Forecast template** from Practical Stock Planner. Open **Load Data**, then open **Templates** in the sidebar. Practical Stock Planner accepts **CSV files only** – one CSV file per input file; this one starts from `template_Forecast.csv`. **Keep the template's header row exactly as it is.** After filling it in Excel, save it with **File › Save As › CSV UTF-8 (Comma delimited)**.
2. **Long format.** One row per SKU per week – not a grid with weeks across the top. Monthly forecasts must be split into weeks.
3. **Single units**, the same unit as SOH.
4. **Weeks start Monday.** Dates are moved to the Monday of their week automatically. Weeks before the plan start are ignored.
5. **Duplicate rows are fine.** Rows for the same SKU and date are simply added up (the app sums by SKU per week, with weeks starting Monday).
6. **Forecast and open orders are not added together.** Each week, Practical Stock Planner uses the **larger** of forecast and open orders. Don't reduce your forecast for orders you've already taken.

Step 1 – Get 12–26 weeks of sales history

System	Report and path	SKU →	Quantity →	Watch out
Shopify	**Analytics > Reports** › *Category* **Sales** › **Total sales by product variant** › date range (e.g. last 12 full weeks) › *(optional)* **Dimensions** → **Time** → **Week** › menu icon **> Export** › CSV · Sales reports	**Product variant SKU**	**Net items sold** (sold minus returned)	Reports show max 1,000 rows on screen – export to get all.
WooCommerce	**Analytics › Products** › **Date range › Custom** =	**SKU**	**Items sold**	One week per download – the *By*

System	Report and path	SKU →	Quantity →	Watch out
	one Monday–Sunday week › **Update** › **Download**. Repeat in **Analytics › Variations** for variable products, and for each week · Products report			*week* interval changes only the chart. Products report rolls variations into the parent SKU – delete parent rows. Over 25 rows → emailed. Add a *Week Starting Date* column to each download.
Xero	**Reporting › All reports › Inventory Item Details** › **Date range** › **Update** › **Filter** *Source*: *Receivable Invoice*, *Receivable Credit Note* (+ *Receive Money* if you sell for cash) › **Export › Excel** · Inventory Item Details	**No Item Code column** – lines sit under a heading row such as `GB1-White - Golf balls - white single (Untracked)`. See the Xero note below.	**−QoH Movement** (sales are negative, credit notes positive)	Title, heading and *Total* rows to delete.
QuickBooks Online	**Reports › Standard reports › Sales by Product/Service Detail** › date range › **Customize** › add **Product/Service full name** and **SKU** › **Export ▼ › Export to Excel**	**SKU** (if blank, look it up by *Product/Service full name*)	**Quantity**	Heading and *Total for …* rows in column A. Dates come out as text (`DD/MM/YYYY`) – convert with *Data › Text to Columns*.

Xero note – putting the SKU on every line: in column I next to the first row under the header, type `=IF(AND(A6<>"",B6=""),A6,I5)` and fill down – each line now carries its item heading. In your Products and services sheet, add a key column `=A2&" - "&B2&" ("&O2&")"` (ItemCode – ItemName (InventoryType)); this matches the heading text exactly. Look the SKU up with `=XLOOKUP(I6, Items!P:P, Items!A:A)`, then delete the heading and *Total* rows (blank **Source**).

Weekly totals (Xero and QuickBooks Online): add `Week` = `=INT(A2)-WEEKDAY(A2,3)` (Monday of the date in A2), then a PivotTable: rows SKU, columns Week, values Sum of quantity.

Step 2 – Turn history into a simple forecast

1. Average weekly demand per SKU = quantity sold ÷ number of weeks (e.g. ÷12). Adjust for known promotions and seasons.
2. Make a list of the next Mondays for your horizon (e.g. 26 weeks), starting at your plan start week. `=INT(A2)-WEEKDAY(A2,3)` gives the Monday of any date.

3. Build long format: copy your SKU + average block once per week, with that week's Monday in *Week Starting Date* (26 weeks × 300 SKUs = 7,800 rows – fine for Excel).
4. Paste into the **Forecast** template (paste as values).

Column mapping

Practical Stock Planner column	What to enter	Blank means
SKU	Your product code, exactly as in SKU_Details	–
Forecast Qty	Expected units sold that week	0
Week Starting Date	The Monday of the week (any date in the week works)	Row not used, with a warning

> **Keep leading zeros in SKUs.** Format the SKU column as *Text* before you type or paste SKUs, then save with *File › Save As › CSV UTF-8 (Comma delimited)*. If you open a CSV directly in Excel (e.g. by double-clicking it), Excel can strip leading zeros (`00123` becomes `123`) – import it via *Data › From Text/CSV* instead 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)*.

Checklist

- ☐ Template header row unchanged, saved as a CSV file (*File › Save As › CSV UTF-8 (Comma delimited)*).
- ☐ One row per SKU per week (long format), weeks from your plan start date onwards.
- ☐ Quantities in single units; returns netted off.
- ☐ *Week Starting Date* holds real dates (not text).
- ☐ SKUs exactly match your SKU_Details file.

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`.

Using Google Sheets instead of Excel? Save each file with *File › Download › Comma-separated values (.csv)*. To keep leading zeros, select the SKU column and choose *Format › Number › Plain text* before you type or paste SKUs.

Set the date format before you upload. On the Load Data page, set **Date format in your files** to match your dates: **Day/Month/Year** (the default, e.g. 05/10/2026 = 5 October) or **Month/Day/Year** (US-style, e.g. 10/05/2026 = 5 October). Only Week Starting Date (Forecast), Ship Date (Open Sales Orders) and Due Date (Open Supply) are read as dates. Dates like 2026-10-05, 2026/10/05 and 13-Apr-2026 are always accepted, whichever setting you choose. If you change the setting, upload the file again. A date that can't fit the setting

(e.g. US-style 10/13/2026 under Day/Month/Year) stops the upload, and the message names the file, column, row and value.

Questions? Contact support@practicalsupplychainplanning.com.

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