Excel → Practical Stock Planner: typing your data into the templates (any file)

Practical Stock Planner – Time-phased stock planning. One short guide for all 7 templates. No IT skills needed – just Excel.

Use this guide when your system doesn't hold the data, or you only have a few rows – for example open purchase orders kept in email, a short supplier list, or a business that has no system guide yet.

Before you start

1. **Download the template you need** 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, from the templates `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`. **Keep the header row exactly as it is.** After filling a template in Excel, save it with **File › Save As › CSV UTF-8 (Comma delimited)**. Extra columns are ignored.
2. **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.
3. **SKUs must match exactly** across all files (upper/lower case, spaces and leading zeros count). Format SKU columns 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, it can strip leading zeros (`00123` becomes `123`) – import it via *Data › From Text/CSV* instead and set the SKU column to *Text*.
4. **Single units.** Quantities in SOH, Open_SO, Open_Supply and Forecast are in each SKU's UoM (unit of measure, e.g. `EA` = each). Only the buying terms in SKU_Supplier_Details are in supplier packs.
5. **Dates** must be real Excel dates, not text. Practical Stock Planner moves every date to the Monday of its week.
6. **Duplicate rows are fine** in SOH, Open_SO, Open_Supply and Forecast. Rows for the same SKU and date are simply added up (the app sums by SKU per week, with weeks starting Monday).
7. **One site.** Add up stock from several locations, or enter one row per location – SOH rows are added up per SKU.

File 1 – SKU_Details (one row per product)

Column	What to type	Blank means
SKU	Your product code. **Must be unique.**	– (required)
Description	Product name	"<SKU> - Description"

Column	What to type	Blank means
UoM	Unit of measure: the unit you count and sell stock in. `EA` means "each", one single item.	`EA`
Group	Your product group or category	"Group TBD"
Safety Stock Weeks	Your target in weeks (e.g. 2)	The default Safety Stock Weeks you set in the app
Cost Price	Unit cost, excluding sales tax. Not negative.	0
Cost Price Currency	e.g. `USD`. **One currency only** across all rows.	⚠ USD
Status *(optional)*	Type `Obsolete` for any product you won't buy again – Practical Stock Planner still shows its stock and demand, but creates no planned supply for it. Otherwise leave blank or type `Active`.	Active

File 2 – SOH (stock on hand)

Column	What to type	Blank means
SKU	Product code	–
SOH	Good stock you physically hold today, in single units. Don't subtract open customer orders – they go in Open_SO.	0

Set Practical Stock Planner's *Plan Start Date* to the day you counted.

File 3 – Open_SO (customer orders not yet shipped)

Column	What to type	Blank means
Sales Order ID	Order number (one row per order line is fine). The column must be there, but the plan never uses it.	Fine – not used
SKU	Product code	–
Open SO Qty	Quantity still to ship	0
Ship Date	Promised ship date. Past dates count as past-due demand.	Plan start date, moved to the Monday of that week, with a warning

Each week, Practical Stock Planner plans for whichever is higher: your forecast or your open orders. If a SKU's open orders are below its forecast, they don't change the plan, so one total line per SKU is enough. Order-by-order detail only matters when open orders are more than the forecast, for example a large one-off order.

File 4 – Open_Supply (purchase orders not yet received)

Column	What to type	Blank means
Supply Order ID	PO number. The column must be there, but the plan never uses it.	Fine – not used
SKU	Product code	Row is dropped
Supply Qty	Quantity still to receive, in single units (cartons × units per carton)	0
Due Date	Expected arrival date. ⚠ Dates before the plan start are **ignored** – update overdue dates first.	Plan start + the Default Lead Time (Weeks) setting (starts at 3, not the product's own lead time), with a warning

File 5 – Supplier_Details (one row per supplier)

Column	What to type	Blank means
Supplier Code	Your short code, e.g. `BAYSIDE`. **Must be unique.**	–
Supplier Name	Supplier's name	"Supplier TBC"
Supplier Contact	Person, email or phone. Shown only on Planned Order Details (and its export), not on the Draft PO.	Blank
Minimum Order Value	Supplier's minimum order value. Only marks planned lines Recommended Yes/No; doesn't change quantities.	0 (every line Recommended No)
Currency	Currency you buy in, e.g. `USD`	⚠ USD

File 6 – SKU_Supplier_Details (buying terms per SKU)

Columns: **SKU**, **Supplier Code**, **Supplier Part**, **Supplier Part Description**, **Lead Time Weeks**, **Supplier UoM** (the pack you buy in, e.g. `CTN` = carton), **Supplier UoM Conversion** (units per pack, never 0), **MOQ Supplier UoM**, **Lot Size Supplier UoM**, **Price per Supplier UoM**. One supplier per SKU – the first row wins. Full details: the Excel buying-terms guide.

File 7 – Forecast (expected weekly sales)

Column	What to type	Blank means
SKU	Product code	–
Forecast Qty	Expected units sold that week	0
Week Starting Date	The Monday of the week	Row not used, with a warning

One row per SKU per week. Full details: the Excel forecast guide.

Checklist

- ☐ Header rows unchanged; each file saved as its own CSV (*File › Save As › CSV UTF-8 (Comma delimited)*).
- ☐ Open sales orders and open supply may be a header row only, when none are open. The other five files each have at least one data row. Stock on hand with nothing in the warehouse is a row with quantity 0.
- ☐ SKUs identical across files; every SKU is in SKU_Details.
- ☐ Supplier Codes identical in Supplier_Details and SKU_Supplier_Details.
- ☐ One currency in *Cost Price Currency*; currency filled in for every supplier.
- ☐ Dates are real dates; no overdue PO dates.
- ☐ Plan Start Date in Practical Stock Planner = the day your SOH was counted.

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.