# QuickBooks Online → Practical Stock Planner: File 1 – SKU Details (your product list)

Practical Stock Planner – Time-phased stock planning. One short guide for one file. No IT skills needed – just a QuickBooks Online login with access to reports, and Excel.

If a QuickBooks label differs slightly, pick the closest match.

**What this file is:** the product master. One row per SKU. Every other file links to it by SKU.

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## Before you start

1. **Download the SKU_Details template** from Practical Stock Planner. Open **Load Data**, then open **Templates** in the sidebar – this is in Practical Stock Planner, not in QuickBooks. Practical Stock Planner accepts **CSV files only** – one CSV file per input file; this one starts from `template_SKU_Details.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. **Check your plan.** "Inventory features are available for QuickBooks Online **Plus and Advanced**. If you use QuickBooks Online Simple Start or Essentials … you can buy the **inventory add-on** or upgrade" (Set up and track your inventory). Your plan is under *Settings ⚙ › **Subscriptions and billing***.
3. **Every inventory item needs a SKU.** SKU is an optional field on QuickBooks items; the sample's inventory items had SKUs (e.g. `NB-1944`, `GB-823`, `WB-0025`) and its service items had none. Items without a SKU: use the **Product/Service full name** as the SKU, consistently in all files.
4. **Units.** QuickBooks Online counts each item in one unit; no unit-of-measure field appeared in the report or export.
5. ⚠ **Report exports are not a clean table.** The file starts with 2–4 title rows (company name, report name, date), then the header row, then **Service** rows mixed in, and a **TOTAL** row and timestamp line at the bottom. Delete those extra rows before you paste into the template.

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## Export steps

**Source:** the **Product/Service List** report.

| # | Step | Status |
|---|---|---|
| 1 | Go to **All apps › Sales & Get Paid › Products & services**. | · Export your QuickBooks Online data |
| 2 | Select **More ▼ › Run report** (opens the **Product/Service List** report). | |
| 3 | Click **Customize** and add the columns you need: **SKU**, **Preferred supplier name**, **Purchase description**. (*Type*, *Purchase price* and *Quantity on hand* | |

| # | Step | Status |
|---|---|---|
| | are already shown.) | |
| 4 | **Export ▼ › Export to Excel** (or *Export as CSV*). | |
| *Alt.* | The **Products and services** page itself also has an **Export to Excel** button – but it exports that screen's columns, not your customised report. | |

Actual header row of the export (row 4, after customising): `Product/Service full name, Type, Memo/Description, Sales price, Purchase price, Quantity on hand, SKU, Preferred supplier name, Purchase description`

## Column mapping

| QuickBooks column | → Practical Stock Planner column | Notes |
|---|---|---|
| **Type** | – (filter) | Keep `Inventory` only; drop `Service` (and Non-inventory) rows. |
| **SKU** (or *Product/Service full name* if no SKU) | **SKU** | ⚠ The full name includes parent/category prefixes separated by colons, e.g. `General services:Badges:Name Badges`. |
| **Memo/Description** (or **Purchase description**) | **Description** | |
| *(no field)* | **UoM** | Unit of measure: the unit you count and sell stock in. `EA` means "each", one single item. No unit field – type `EA` (or leave blank – Practical Stock Planner fills `EA`). |
| *(no Category column)* | **Group** | No separate category column in the export. The first part of *Product/Service full name* (before the first `:`, e.g. `General services`) can serve as a group – whether that prefix is a category or a parent item depends on your setup. Blank → "Group TBD". |
| *(your choice)* | **Safety Stock Weeks** *(optional)* | How many weeks of extra cover you want held for this product. Leave blank to use the default Safety Stock Weeks you set in the app. |
| **Purchase price** | **Cost Price** | For the cost QuickBooks values stock at, use **Calc. Avg** from the Inventory Valuation Summary (steps in the QuickBooks stock on hand guide). Enter costs **excluding sales tax** (e.g. GST or VAT) – whether *Purchase price* includes tax depends on how you set up the item. |

| QuickBooks column | → Practical Stock Planner column | Notes |
|---|---|---|
| *(your currency)* | **Cost Price Currency** | No currency column. Type your currency, e.g. `USD`, on every row. Only one currency is allowed. ⚠ Blank → Practical Stock Planner assumes **USD**. |
| *(your decision)* | **Status** *(optional column)* | 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. Leave blank (or type `Active`) for everything else. |

**Keep this export.** It also gives *Quantity on hand*, *Preferred supplier name*, *Purchase description* and *Purchase price* – useful for SOH, Supplier_Details and SKU_Supplier_Details.

## Excel clean-up

1. Delete the title rows above the header and the **TOTAL** row (and timestamp line) at the bottom.
2. Filter **Type** = Inventory; delete the rest.
3. Check for blank and duplicate SKUs (*Conditional Formatting › Duplicate Values*); format the SKU column as *Text* to keep leading zeros.
4. Copy the finished columns into the **SKU_Details** template (paste as values).

> **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, header in row 1, saved as a CSV file (*File › Save As › CSV UTF-8 (Comma delimited)*).
- ☐ Title rows, *TOTAL* row and timestamp line removed.
- ☐ Only **Inventory**-type items.
- ☐ Every row has a SKU (or the full name, used the same way in every file), and no SKU appears twice.
- ☐ Costs excluding sales tax; one currency in *Cost Price Currency* (e.g. `USD`).
- ☐ Products you won't buy again marked `Obsolete`.

**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.

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.