QuickBooks Online → Practical Stock Planner: File 5 – Supplier_Details (your supplier 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: one row per supplier. Practical Stock Planner shows these on planned supply orders and checks minimum order values. Columns: `Supplier Code`, `Supplier Name`, `Supplier Contact`, `Minimum Order Value`, `Currency`.

Before you start

1. **Download the Supplier_Details 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_Supplier_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. ⚠ **Report exports are not a clean table.** The file has title rows above the header and a timestamp line at the bottom. Delete them before you paste into the template.

Export steps

#	Step	Status
1	**Reports › Standard reports** › search **Supplier Contact List**. In a US company the report may be named *Vendor Contact List*.	
2	The default columns are enough. If you buy in a currency that is not on the report, type it into the template.	
3	**Export ▼ › Export to Excel**.	

Actual header row (row 4): `Supplier, Phone numbers, Email, Full name, Billing address, Account No.` – no currency column.

Column mapping

QuickBooks	→ Practical Stock Planner column	Notes
Supplier (display name)	**Supplier Code**	Must be unique. It matches *Supplier display name* on the Open Purchase Order Detail report and should match *Preferred supplier name* on the Product/Service List, so your SKU_Supplier_Details file links without a lookup.
Supplier (or **Full name**)	**Supplier Name**	*Full name* is the contact person (e.g. `Christina Hall` – note double spaces in the export; use *TRIM*).
Full name / **Phone numbers** / **Email**	**Supplier Contact**	
(not held)	**Minimum Order Value**	Type it if needed, else blank (→ 0). It only sets Recommended Yes/No; a 0 marks every line No.
(no currency column)	**Currency**	Type the currency you buy in, e.g. `USD`. ⚠ Blank → USD.

The list contains **all** suppliers (banks, utilities, individuals) – keep only the ones you buy stock from.

Checklist

- ☐ Template header row unchanged, header in row 1, saved as a CSV file (*File › Save As › CSV UTF-8 (Comma delimited)*).
- ☐ Title rows and timestamp line removed.
- ☐ Only suppliers you buy stock from; no Supplier Code appears twice.
- ☐ Supplier Codes match the Preferred supplier names used in your SKU_Supplier_Details file.
- ☐ Currency filled on every row (blank means USD).

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.