# Shopify → Practical Stock Planner: File 3 – Open_SO (open customer orders)

Practical Stock Planner – Time-phased stock planning. One short guide for one file. No IT skills needed – just Shopify admin access and Excel.

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

**What this file is:** customer orders you haven't shipped yet. Columns: `Sales Order ID`, `SKU`, `Open SO Qty`, `Ship Date`.

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## Before you start

1. **Download the Open_SO 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_Open_SO.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. **Export on the same day as your SOH file**, and use SOH = *On hand − Unavailable* (see the Shopify stock on hand guide). That way open orders are counted once.
3. **Quantities are in single units.**
4. **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).

> **Do you need order-by-order detail?** 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 a single total line per SKU (Option A) is enough. Option B is only worth the effort when open orders are more than the forecast, for example a large one-off order. There's no need to go through the orders page by page otherwise.

Shopify orders have no "promised ship date", so there are two ways to do this. **Option A is quickest.**

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## Option A – use the "Committed" quantity (quick)

Uses the inventory CSV you exported for SOH (**Products > Inventory › Export**, *All states* – inventory CSV page).

| Shopify column | → Practical Stock Planner column | Notes |
|---|---|---|
| *(type any label, e.g.)* `COMMITTED` | **Sales Order ID** | |
| **SKU** | **SKU** | |

| Shopify column | → Practical Stock Planner column | Notes |
|---|---|---|
| **Committed (not editable)** | **Open SO Qty** | Shopify: "units that are set aside and can't be sold, such as units in an unfulfilled order, reserved in a draft order, or in a transfer that's marked as ready to ship". |
| *(leave blank)* | **Ship Date** | Blank → Practical Stock Planner uses the plan start date (i.e. "ship now"). |

Delete rows where Committed = 0 or `not stocked`. ⚠ Committed can include draft-order reservations and outbound transfers between your own locations. If those matter to you, use Option B.

## Option B – export unfulfilled orders (more detail)

| # | Step | Status |
|---|---|---|
| 1 | Go to **Orders** and filter by **fulfillment status**. The values offered are **Fulfilled, Unfulfilled, Partially fulfilled, Scheduled, On hold, Request declined** – tick **Unfulfilled** and **Partially fulfilled** (add *Scheduled* / *On hold* if you still intend to ship those). | |
| 2 | From the Orders page, click **Export**. | |
| 3 | In the **Export orders** window choose **Current page** – with a filter applied, this exports the filtered list. (The other options are **All orders** and **Selected: N orders**; there is no separate "filtered orders" option.) Choose CSV and click **Export orders**. | |
| 4 | A smaller file (`orders_export_….csv`) **downloads straight away**. Shopify's help says larger exports are emailed instead Exporting orders. | / |

⚠ **Page-size risk:** *Current page* only exports the orders shown on the current page of the list. If you have more open orders than fit on one page, either show more orders per page / work through each page, or choose **All orders** and delete the fulfilled and cancelled rows in Excel. Always check that the number of orders in the file matches the count shown in Shopify.

| Shopify order CSV column | → Practical Stock Planner column | Notes |
|---|---|---|
| **Name** (order number, e.g. #1052) | **Sales Order ID** | Orders with several lines have one row per line; many order-level fields (e.g. *Fulfillment Status*) are blank on the extra rows – *Name* is repeated on every row. |
| **Lineitem sku** | **SKU** | Exact header is `Lineitem sku` (lower-case "sku"). Blank for products without a SKU – delete those rows. |
| **Lineitem quantity** | **Open SO Qty** | Keep only lines whose **Lineitem fulfillment status** is not `fulfilled` (unshipped lines show `pending`). For a partly shipped line, check the quantity against the order and adjust by hand, or use Option A. |

| Shopify order CSV column | → Practical Stock Planner column | Notes |
|---|---|---|
| **Created at** | **Ship Date** | No promised date in Shopify. Format is e.g. `2026-10-01 22:54:40 -0400` – use `=DATEVALUE(LEFT(P2,10))` to turn it into a date. Older orders become "past due" demand, which Practical Stock Planner deducts straight away (correct – the customer is waiting). |

Also remove cancelled orders (**Cancelled at** not blank – note the spelling).

> **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)*).
- ☐ Option A: zero and `not stocked` rows removed. **Or** Option B: fulfilled, cancelled and blank-SKU rows removed, and the order count matches Shopify.
- ☐ *Ship Date* is a real date (or blank).
- ☐ SKUs exactly match your SKU_Details file.
- ☐ No open orders? Keep the header row and add no data rows. That means none are open.

**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.