Shopify → 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 Shopify admin access and Excel.

If a Shopify 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.

Before you start

1. **Download the SKU_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_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. **Every product you plan needs a SKU in Shopify, and SKUs must be unique.** Duplicate SKUs make the upload fail. Products without a SKU can't be planned. (Shopify describes SKU as "the Stock Keeping Unit (SKU) of a variant, used to track inventory" – Using CSV files for products.)
3. **Check your email.** The product export is **emailed to the store owner as a download link** – it does not download straight away. If you are not the store owner, ask them to forward the email (or the file).

Export steps

#	Step	Status
1	From your Shopify admin, go to **Products**.	· Exporting products
2	Click **Export**.	
3	Choose **All products** (or *Products that match your search and filters* if you only want some – e.g. filter out gift cards).	same page
4	Choose **CSV for Excel, Numbers, or other spreadsheet programs**.	
5	Click **Export products**. The file is **emailed to the store owner as a download link** – open the email and click the link to download the CSV (`products_export_1.csv`).	

Column mapping

Shopify product CSV column	**→ Practical Stock Planner column**	**Notes**
Variant SKU	**SKU**	Must be filled and unique.
Title + **Option1 Value** (+ Option2/3 Value)	**Description**	e.g. "Strawberry Jam – 250 g". Products without variants show `Default Title` in Option1 Value.
(not held in Shopify)	**UoM**	Unit of measure: the unit you count and sell stock in. `EA` means "each", one single item. Type `EA` (or leave blank – Practical Stock Planner fills `EA`).
Type (your own product type label)	**Group**	Shopify: "A label that describes the product if you need a custom category…". Blank → Practical Stock Planner uses "Group TBD".
(not held)	**Safety Stock Weeks**	Type your target in weeks (e.g. 2), or leave blank to use the default Safety Stock Weeks you set in the app.
Cost per item	**Cost Price**	"How much it costs you to make or acquire the product or variant"; column present. Blank → 0.
(your store currency)	**Cost Price Currency**	Type your store currency, e.g. `USD`, on every row. Only one currency is allowed. ⚠ If 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.

The **Variant Inventory Tracker** column shows `shopify` when inventory tracking is on for a product, and is blank when it isn't. Switch tracking on for the products you plan.

Excel clean-up

1. **Fill down product-level fields.** A product with several variants has its details on the first row only; the following rows leave **Title, Vendor, Type, Tags and Status** blank. Select those columns → *Home › Find & Select › Go To Special › Blanks* → type = and the cell above → **Ctrl+Enter**.
2. **Remove image-only rows** – rows with no Variant SKU and no Option1 Value (extra images add extra rows).
3. Build Description: `=B2&" – "&J2` (Title & Option1 Value – adjust the column letters to your file). Delete " – Default Title" where the product has no variants.
4. Check for duplicate SKUs: *Home › Conditional Formatting › Highlight Cells Rules › Duplicate Values* on the Variant SKU column.
5. Copy the finished columns into the **SKU_Details** template (paste as values).

Keep the product CSV. Its **Vendor** and **Cost per item** columns help with the SKU_Supplier_Details file later.

> **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)*).
- ☐ Every row has a SKU, and no SKU appears twice.
- ☐ Image-only rows removed; Title and Type filled down on variant rows.
- ☐ One currency in *Cost Price Currency* (e.g. `USD` on every row).
- ☐ Products you won't buy again marked `Obsolete`.
- ☐ SKUs typed exactly the same as in your other files (watch spaces, leading zeros, upper/lower case).

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.