Shopify → Practical Stock Planner: File 2 – SOH (stock on hand)

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: how many units of each SKU you hold today. Columns: `SKU`, `SOH`.

Before you start

1. **Download the SOH 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_SOH.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 day you plan.** Do it first thing in the morning, and set Practical Stock Planner's *Plan Start Date* to that day (Practical Stock Planner's glossary: the plan start date "should match when the SOH data is captured").
3. **One site.** Practical Stock Planner plans one site. If you have several Shopify locations, the steps below add them together.
4. **Single units.** SOH is counted in single units (Shopify's normal unit).
5. **Check your email.** The inventory export is **emailed to the store owner as a download link** – it does not download straight away.

Export steps

#	Step	Status
1	From your Shopify admin, go to **Products > Inventory**.	· Exporting and importing inventory with a CSV file
2	Click **Export**.	
3	In **Export from**, choose **All locations** (or just your warehouse if only one location is the planning site).	same page
4	Under **Inventory states shown**, choose **All states**.	same page (that export includes the state columns below)
5	Under **Export**, choose **All variants**, choose the CSV format, then click **Export variants**.	Button name; other options

#	Step	Status
6	The file is **emailed to the store owner as a download link** – download `inventory_export_1.csv` from the email.	

The *All states* file has one row per variant **per location** (column **Location**), with the columns **Incoming (not editable)**, **Unavailable (not editable)**, **Committed (not editable)**, **Available (not editable)**, **On hand (current)** and **On hand (new)**. Locations where a variant isn't stocked show the text `not stocked`. **Keep this file** – the quick option in the Shopify open sales orders guide uses it too.

Column mapping

Shopify inventory CSV column	→ Practical Stock Planner column	Notes
SKU	**SKU**	(the inventory file says **SKU**, the product file says **Variant SKU**)
On hand (current) − **Unavailable (not editable)**	**SOH**	Shopify definitions: *On hand* = units at the location; *Unavailable* = e.g. damaged, quality hold; *Committed* = units in unfulfilled orders etc.; *Available* excludes committed and unavailable. Ignore **On hand (new)** – it is only for importing changes.

Why not "Available"? Practical Stock Planner loads your open customer orders separately (File 3 – Open_SO). *Available* already subtracts *Committed*, so those orders would be counted twice. Use **On hand minus Unavailable** – the good stock you physically hold.

Excel clean-up

1. Add a column `SOH` = `On hand (current)` − `Unavailable (not editable)`. If a cell says `not stocked`, enter 0. An item with no stock is a row with quantity 0.
2. Several locations? No need to add them up. Rows for the same SKU are simply added up – Practical Stock Planner **sums SOH per SKU automatically**. Paste one row per SKU per location.
3. Delete rows with a blank SKU (products without a SKU can't be planned).
4. Paste **SKU** and **SOH** into the **SOH** template.

> **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)*).

- ☐ SOH = On hand (current) − Unavailable (not *Available*).
- ☐ `not stocked` cells set to 0; blank-SKU rows removed.
- ☐ SKUs exactly match your SKU_Details file.
- ☐ Plan Start Date in Practical Stock Planner = the day you exported this file.

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.