WooCommerce → 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 a WordPress login with the Administrator or Shop Manager role, and Excel.

If a WooCommerce 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`.

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. **Log in as an Administrator or Shop Manager.** Orders can be viewed by "Admin and Shop Manager" roles (Managing orders).
3. **Match your SOH choice.** WooCommerce has already reduced stock for Processing and On hold orders. If you used *Stock as it is* for SOH (option (b) in the WooCommerce stock on hand guide), **leave those orders out of this file** – they are already deducted. Only build this file if you added them back to SOH (option (a)).
4. **Set Analytics › Settings › Date type to Date created** and click **Save settings**. The default is **Date paid**. With that setting, **On hold** orders that are not paid yet do not appear in the Orders report.
5. **Refresh Analytics first.** Analytics updates every 12 hours by default. Click **Update now** in the *Data status* box at the top of the report before you download (Analytics).
6. **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 is enough – add the quantities up per SKU in Excel (PivotTable) and leave *Ship Date* blank. Order-by-order detail is only worth the effort when open orders are more than the forecast, for example a large one-off order.

Which orders are open? Processing ("awaiting fulfillment" – your cue to ship) and On hold ("awaiting payment confirmation", e.g. bank transfer) (Order statuses). Completed = fulfilled. **WooCommerce core has no order CSV export** – the Orders screen has no export button or bulk action (only *Move to Trash* and *Change status to…*).

Option A – Analytics › Orders (free)

#	Step	Status
1	Check **Analytics › Settings › Date type** = **Date created** (see *Before you start*).	
2	**Analytics › Orders**. Set **Date range** (Custom) to cover your oldest open order, e.g. the last 3 months.	· Orders report
3	**Show** › **Advanced filters** › **Order status** › **Is** › tick **Processing** and **On hold**.	(filter values seen: Pending payment, Processing, On hold, Completed, Cancelled, Refunded, Failed, Draft; *Is / Is Not*; *All / Any*)
4	Click **Update now**, then **Download**.	

⚠ If the data runs to **more than one page** (25 rows by default), the CSV is **not downloaded – it's emailed** to the logged-in admin. A longer report can say "Your Revenue Report will be emailed to you.". Set the rows-per-page menu at the bottom of the table to 100 first – the choices are 25/50/75/100; whether this avoids the email is.

Exact header row: `Date,"Order #",Status,Customer,"Customer type",Product(s),"Items sold",Coupon(s),"Net sales",Attribution` Example row: `"2026-09-27 10:00:00",57,processing,"Jordan Lee",new,"4× Hoodie - Green, No, 1× T-Shirt",5,,198,Unknown`

WooCommerce	→ Practical Stock Planner column	Notes
Order #	**Sales Order ID**	
Product(s)	**SKU** (via name lookup)	⚠ One cell per order, `quantity× product name`, with **names not SKUs**. Split into one row per product (Excel below), then look up the SKU by name from the **Analytics › Stock** download (column *Product / Variation* – same names, e.g. `Hoodie - Green, No`).
Product(s) quantity	**Open SO Qty**	The number before ×. Core doesn't track shipped quantities – adjust part-shipped orders by hand.
Date	**Ship Date**	The order date – there's no promised/ship date in core. Past dates = past-due demand (deducted straight away), which is right for orders waiting to ship. Or add your usual dispatch days.
Status	– (check)	`processing` / `on-hold`.

Excel – split the Product(s) cell. ⚠ Variation names contain commas (`Hoodie - Green, No`), so you can't simply split at ", ". In Excel 365: `=REGEXREPLACE(F2,", (?=\d+×)","|")` puts a `|` only before each new `n×` item; then *Data › Text to Columns* (delimiter `|`), unpivot (Power Query *Unpivot Columns*), and split each item at the first `×` into quantity and name. Then `=XLOOKUP(name, StockReport[Product / Variation], StockReport[SKU])`.

Option B – Customer / Order / Coupon Export extension (paid, cleanest)

The official marketplace extension **Customer / Order / Coupon Export for WooCommerce** by SkyVerge: **1-year plan $79**, 2-year plan $126.40 (marketplace page; currency shown as $ – US dollars); 30-day money-back guarantee. It exports orders to CSV/XML "manually or on an automated schedule", with a **Default – One row per item CSV format** among its predefined formats (docs).

#	Step	Status
1	**WooCommerce › Export** › *Manual Export* tab. **Output type** CSV, **Export type** orders, **Format** *Default – One row per item*.	
2	In **Export Options**, target the orders – the marketplace page mentions filtering by "order status"; pick Processing and On hold (labels). Don't tick **Mark as exported** (it excludes them from future exports).	/
3	Click **Export**; download from the admin notice or **WooCommerce › Exports › Export List** (kept 14 days).	

One row per order line gives order number, SKU and quantity per row. Check the column names in your file; a paid export can name them differently. Not needed if you have few open orders – Option A works for free.

> **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)*).
- ☐ Analytics *Date type* = Date created; **Update now** clicked before downloading.
- ☐ Only Processing and On hold orders; one row per product, with the SKU looked up.
- ☐ Matches your SOH choice: orders listed here **only** if you added them back to SOH.
- ☐ 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.