WooCommerce → 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 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: 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. **Stock management must be on.** A product's **Stock** is only a number when stock management is switched on for it; otherwise the **Stock** column of the export is blank (Product CSV Importer & Exporter). Switch it on (product › *Inventory* tab, *Manage stock*) or count those products outside WooCommerce.
3. **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").
4. **One site, single units.** WooCommerce core has **one stock number per product** (a single *Stock* column, no locations). Everything is counted in the unit you sell.

Option A – the product export (recommended)

Use the **Stock** column of the product CSV: **Products › All Products › Export › Generate CSV** (full steps in the WooCommerce products guide). It's a number for products with stock management on, blank otherwise. **In stock?** is `1` for in stock. It downloads straight away and is never emailed.

Option B – Analytics › Stock

#	Step	Status
1	**Analytics › Stock**.	· Stock report
2	**Show** › **All products** (other choices: Out of stock, Low stock, In stock, On backorder).	
3	Click **Update now** (Data status), then **Download** (top right of the table).	

Exact header row: `"Product / Variation",SKU,Status,Stock` ⚠ Products **without stock management show "N/A" on screen but `0` in the CSV** – don't load those zeros as real stock. Variable parents, grouped and external products are listed too – delete them. ⚠ More than 25 rows → the CSV is emailed to the logged-in admin instead of downloading (Analytics). So Option A is easier.

Column mapping

WooCommerce	→ Practical Stock Planner column	Notes
SKU	**SKU**	Keep only `simple` and `variation` rows.
Stock	**SOH**	**But see the warning below.**

⚠ Avoid double counting open orders

WooCommerce reduces stock when an order becomes **Processing** or **On hold** – before you ship (Order statuses). Stock falls as soon as orders are set to Processing **or On hold**. Practical Stock Planner deducts open orders itself (File 3 – Open_SO). Choose **one** of:

- **(a) Recommended – dated demand: SOH = WooCommerce Stock + quantity on Processing and On hold orders** (the orders not yet shipped), and list those orders in your Open_SO file. For example, a belt showing 23 might be 28 on the shelf, minus 3 Processing and 2 already shipped. The physical stock for planning is 23 + 3 = 26.
- **(b) Simple: SOH = WooCommerce Stock as it is**, and **leave Processing / On hold orders out of Open_SO** (they're already deducted). You lose their dates, but nothing is counted twice.

Pending payment orders don't reduce stock (no payment yet); WooCommerce's *Hold Stock* setting only reserves stock for a while. Leave them out, or treat them as open orders under (a). **Completed** = shipped – already out of stock and not open. Cancelled/failed orders return stock.

Excel clean-up

1. Keep only `simple` and `variation` rows with stock management on (a number in **Stock**).
2. Apply (a) or (b) above.
3. Products without stock management: count them and type `SKU` + `SOH` by hand.
4. Paste **SKU** and **SOH** into the **SOH** template. Rows for the same SKU are simply added up.

> **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)*).
- ☐ Only `simple` and `variation` rows; untracked products (blank Stock, or `0` in the Stock report CSV) counted by hand or left out.
- ☐ SOH is **either** Stock + Processing/On hold quantities (with those orders in Open_SO) **or** Stock as it is (with those orders left out) – not both.
- ☐ 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.