Xero → 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 a Xero login and Excel.

If a Xero 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. Use this guide if you track your stock in Xero's **Products and services**. If your products live in an add-on such as Cin7 or Unleashed, export from the add-on instead.

Before you start

1. **Download the SKU_Details template** from Practical Stock Planner. Open **Load Data**, then open **Templates** in the sidebar – this is in Practical Stock Planner, not in Xero. 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 item you plan needs a unique item Code.** The Xero item **Code** is your SKU. Xero suggests using "SKU, ASIN, ISBN, MPN, UPC, EAN, GTIN or another standard reference code" as the item code; codes can be up to 30 characters and names up to 50 characters (Add an inventory item, Import inventory items). Codes can contain spaces and hyphens (e.g. `TSS - Black`) – copy them exactly.
3. **Your user role.** Exporting the item list needs the administrator or standard role (or permission to view items).
4. **Units.** Xero items have no unit-of-measure field. Everything is counted in single units (the unit you buy and sell the item in).

Export steps

Source: the **Products and services** CSV export. (Don't use the *Inventory Item Details* report – it has no separate Item Code column.)

#	Step	Status
1	In the **Sales** menu, select **Products and services**.	· Export inventory items out of Xero
2	*(Optional)* The list opens with a **Status = Active** filter; use **Add filter** to change which items are shown. Keep *Active* to leave out items you no longer use. After you export, check the CSV only contains the items you meant to include.	

#	Step	Status
3	Click **Export**, then select **CSV**. The file downloads straight away (e.g. `InventoryItems-20261003.csv`).	

Actual header row of the CSV: `*ItemCode, ItemName, Quantity, PurchasesDescription, PurchasesUnitPrice, PurchasesAccount, PurchasesTaxRate, SalesDescription, SalesUnitPrice, SalesAccount, SalesTaxRate, InventoryAssetAccount, CostOfGoodsSoldAccount, Status, InventoryType`

Column mapping

Xero CSV column	→ Practical Stock Planner column	Notes
***ItemCode** (the header includes the asterisk)	**SKU**	Must be unique.
ItemName (or **PurchasesDescription** / **SalesDescription**)	**Description**	ItemName is max 50 characters.
(not held)	**UoM**	Unit of measure: the unit you count and sell stock in. `EA` means "each", one single item. No unit field in Xero – type `EA` (or leave blank – Practical Stock Planner fills `EA`).
(not held)	**Group**	No category field. Type your own groups, or leave blank → "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.
PurchasesUnitPrice – *or better, tracked items' average cost*	**Cost Price**	PurchasesUnitPrice = "The price you pay for the item in your base currency" (tax-inclusive if you enter bills tax-inclusive) – use the price excluding sales tax (e.g. GST or VAT). For tracked items, use **Total Value ÷ Quantity** from the **Inventory Item List** report (steps in the Xero stock on hand guide) – the average cost Xero uses for stock.
(your base currency)	**Cost Price Currency**	Xero item prices are in your **base currency** – e.g. type `USD` on every row. Only one currency is allowed. ⚠ If blank, Practical Stock Planner assumes **USD**.
InventoryType (`Tracked` / `Untracked`)	–	The export uses `Tracked` or `Untracked`. Handy for spotting untracked items; tracked items also have **InventoryAssetAccount** filled.
(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

Xero CSV column	→ Practical Stock Planner column	Notes
		`Active`) for everything else. (Xero's own **Status** column shows `Active` – don't copy it across.)
Quantity	–	Filled for tracked items only. Use the Xero stock on hand guide for stock on hand.

Excel clean-up

1. Delete rows for services and non-stock items you don't plan (e.g. freight, labour) – Xero keeps them in the same list (for example *Development work* and *Training*).
2. Check for duplicate codes: *Home › Conditional Formatting › Highlight Cells Rules › Duplicate Values* on the ItemCode column.
3. Watch for codes that Excel changes – e.g. leading zeros dropped or codes turned into dates (Xero warns about this when importing too). Open the CSV via *Data › From Text/CSV* and set the ItemCode column to *Text*. Long descriptions can contain line breaks – *From Text/CSV* handles these correctly.
4. Copy the finished columns into the **SKU_Details** template (paste as values), with header **SKU** (not `*ItemCode`).

Keep the CSV. Its **PurchasesDescription** and **PurchasesUnitPrice** 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)*).
- ☐ Services and non-stock items removed.
- ☐ Every row has a SKU, no SKU appears twice, and codes are exactly as in Xero (no lost leading zeros).
- ☐ Cost Price excluding sales tax (average cost for tracked items).
- ☐ One currency in *Cost Price Currency* (your Xero base currency, e.g. `USD`).
- ☐ Products you won't buy again marked `Obsolete`.

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.