Xero → Practical Stock Planner: File 5 – Supplier_Details (your supplier list)

Practical Stock Planner – Time-phased stock planning. One short guide for one file. No IT skills needed – just a Xero login and Excel.

What this file is: one row per supplier. Practical Stock Planner shows these on planned supply orders and checks minimum order values. Columns: `Supplier Code`, `Supplier Name`, `Supplier Contact`, `Minimum Order Value`, `Currency`.

Before you start

1. **Download the Supplier_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_Supplier_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. **There's no supplier export on the current screen**. **Contacts › Suppliers** lists your suppliers, but its **Actions** menu has no Export option, and no CSV could be downloaded. Xero Central's *Export contacts* article describes a menu-icon › Export route (Export contacts). If you don't see Export, type the supplier list in (step 3).
3. **So you type it in.** Most small businesses buy from a handful of suppliers, so this is quick. Type it once and keep it.

Steps

#	Step	Status
1	Go to **Contacts › Suppliers** – use the list as your checklist. (The **Supplier** column on **Purchases › Purchase orders** also shows who you buy from.)	
2	Open each supplier you plan for, and copy the contact person, email or phone.	–
3	Type one row per supplier into the **Supplier_Details** template.	–

Column mapping

Practical Stock Planner column	What to type	Notes
Supplier Code	Your own short code (e.g. `BAYSIDE`) or the supplier name	Must be unique, and must match the *Supplier Code* in your SKU_Supplier_Details file exactly.

Practical Stock Planner column	What to type	Notes
Supplier Name	The contact name as shown in Xero (e.g. *Bayside Wholesale*)	Blank → "Supplier TBC".
Supplier Contact	Person, email or phone – open the contact in Xero to copy it	Optional. Shown only on Planned Order Details, not on the Draft PO.
Minimum Order Value	The supplier's minimum order, if any	Blank → 0. It only marks lines Recommended Yes/No (a 0 marks every line No); it does not change order quantities.
Currency	The currency you buy in, e.g. `USD`	⚠ Blank → USD.

Checklist

- ☐ Template header row unchanged, saved as a CSV file (*File › Save As › CSV UTF-8 (Comma delimited)*).
- ☐ One row per supplier you buy stock from; no Supplier Code appears twice.
- ☐ Supplier Codes typed exactly the same as in your SKU_Supplier_Details file.
- ☐ Currency filled on every row (blank means USD).

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.