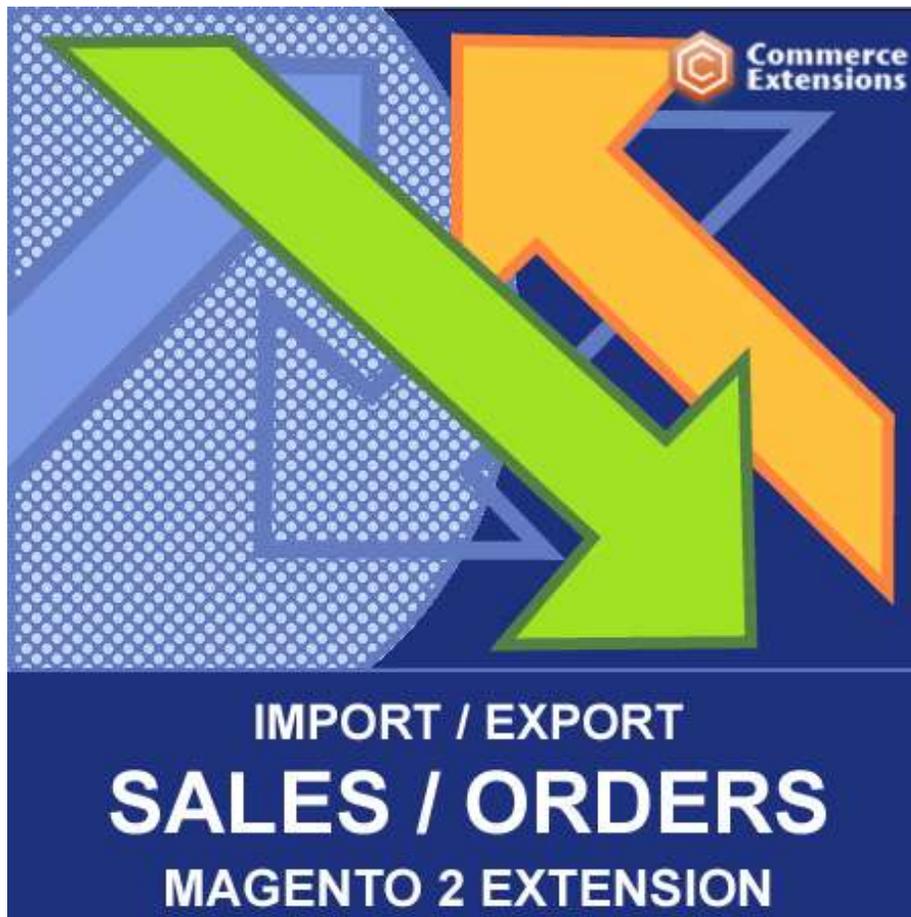


# MAGENTO 2 IMPORT/EXPORT SALES/ORDERS



## User Guide

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## Extension Overview

Commerce Extensions Orders import / export extension, using this extension you can import/export all order data and related customer data. It will import/export all order data as well as related customer data (billing/shipping address), email address, and this works for registered customers or people who checked out as guest. If the customer that already exists in the DB it assigns the order to it or it will create a new one and automatically generate a password and email it to that customer.

Sample csv's are provided as well as a detailed PDF with install instructions and setup configuration. It optionally can export historical product pricing for products ordered as well as historical tax data. The extension can accept custom order numbers and will work with any custom order number extension or you can leave blank for auto increment.

This is a ideal extension for doing data transfers from one magento install to another magento install. Espically between magento 1 and magento 2 installs.

### -=[ Features ]=-

- \* Import/export orders for any type (simple/simple with custom options/configurable/bundle/downloadable/virtual)
- \* Import orders with or without all required customer address fields
- \* Import orders with any shipping method even if it its not enabled and/or doesn't exist in store at the time of import
- \* Import orders with any payment method even if it its not enabled and/or doesn't exist in store at the time of import
- \* Can create invoices and shipments at time of import
- \* Can work with any Order status or custom order statuses
- \* Can optionally export historical product prices and historical tax data

- \* Can work with any 3rd party custom order number extension
- \* Supports multi-language and all currencies
- \* Supports Import/Export of Custom Order Numbers
- \* Great for exporting orders from older Magento installs and importing the exact same orders on new install

## Extension Installation

1. Log out from Magento Admin panel if you are logged in
2. Unpack the contents of the zip file purchased and VIA ftp and upload the app folder to your magento install root.
3. SSH into your magento server and Clear cache using command  
`php -f bin/magento cache:flush`
4. After uncompressing the order import/export package, you should have one folder: app

Upload everything in the app/\* folder to your app/\* folder.

5. SSH into your magento server and run command via ssh in root of magento install to install module

```
php -f bin/magento setup:upgrade
```

and

```
php -d memory_limit=1024M -f bin/magento setup:di:compile
```

and depending on your installation settings you may also need to run

```
php -f bin/magento deploy:static:content
```

## Extension Usage

1. **DO NOT** - Edit any CSV in Microsoft Excel. Doing so strips the format and breaks the import. I recommend using OpenOffice Calc (openoffice.org) and saving in Unicode UTF-8 format.

For information about how to save in the UTF-8 format using OpenOffice Calc, see this article:

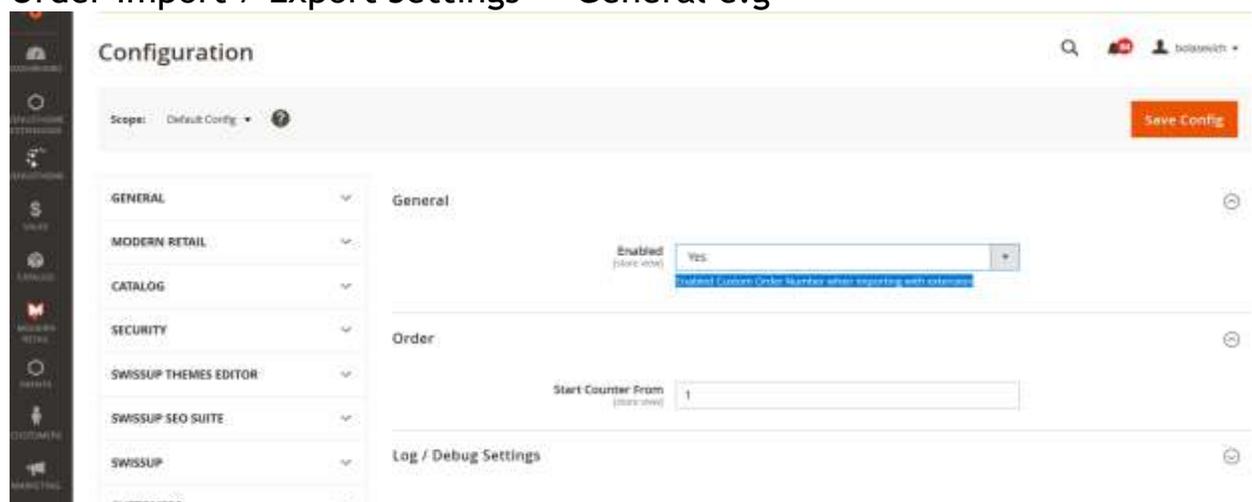
<http://stackoverflow.com/questions/10905588/exporting-csv-properly-open-office-save-numbers-as-text>

2. Using the Import/Export extension is very straight forward. You can find in magento admin under

system -> import/export orders

and you can run the export to get a sample csv of orders already in your site and then you just upload via admin panel run the import profile and it will import it back in. This action will import the order back into your store *assuming that the order\_id is different.*

3. You can optionally enable/disable custom order numbers before import by going to Stores->Configuration-> Commerce Extensions -> Order Import / Export Settings -> General e.g



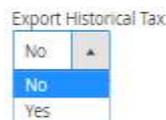


6. FOR ORDER TRANSFERS: If you are exporting from an older site and importing into a newer site and your newer site DOES NOT have products in stock/available in the store for the older orders, you likely need to set this item to Yes:



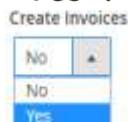
By making this setting, you will export all product pricing/product name data with the orders at time of order. This will enable you to reimport this data even if the products no longer exist. If you don't set this item to "Yes", the export will result in 0.00 pricing for all ordered/products not in the store.

7. FOR ORDER TRANSFERS: If you are exporting from an older site and importing into a newer site and your newer site DOES NOT have the same tax setup or the tax setup does NOT, you likely need to set this item to Yes:

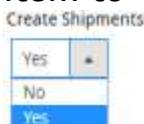


By making this setting, you will export all historic tax data with the orders at time of order. This will enable you to reimport this data even if the new site tax data no longer exist.

8. ON import, if you want to generate invoices, set the following item to "Yes". "No" means no invoices are generated:



9. ON import, if you want to generate shipments, set the following item to "Yes". "No" means no shipments are generated:



10. ON import, if you want to force your own tax amount and tax percentage, set the following item to “Yes”. “No” means no tax rates are used from whatever the install has setup. Also note if your setting this to true it is assumed you also have the tax\_amount and tax\_percentage column in your csv:

Use Historic Tax

|     |   |
|-----|---|
| No  | ▾ |
| No  |   |
| Yes |   |

11. ON import, if you want to NOT lookup skus for orders against the existing catalog and just import from the order data as-is aka historical data, set the following item to “Yes”. “No” means no the product sku for the order is looked up against the catalog in the magento installation. A great example of setting this to true is when your moving historical order data and a historical order has a sku that has since changed product configuration wise. E.g maybe it was a simple w/ custom option and now its setup same way but as a configurable with same sku.

Skip Product Lookup

|     |   |
|-----|---|
| No  | ▾ |
| No  |   |
| Yes |   |

12. If you want to “UPDATE” customer addresses on import, make sure this line is in your import profile XML and set to Yes

Update Order Addresses

|     |   |
|-----|---|
| No  | ▾ |
| No  |   |
| Yes |   |

## Support

CommerceExtensions offers only PAID support and 6 months updates for all magento 2 extensions.

If you need paid support related to CommerceExtensions extension usage, feel free to contact me at [scottbolasevich@gmail.com](mailto:scottbolasevich@gmail.com)