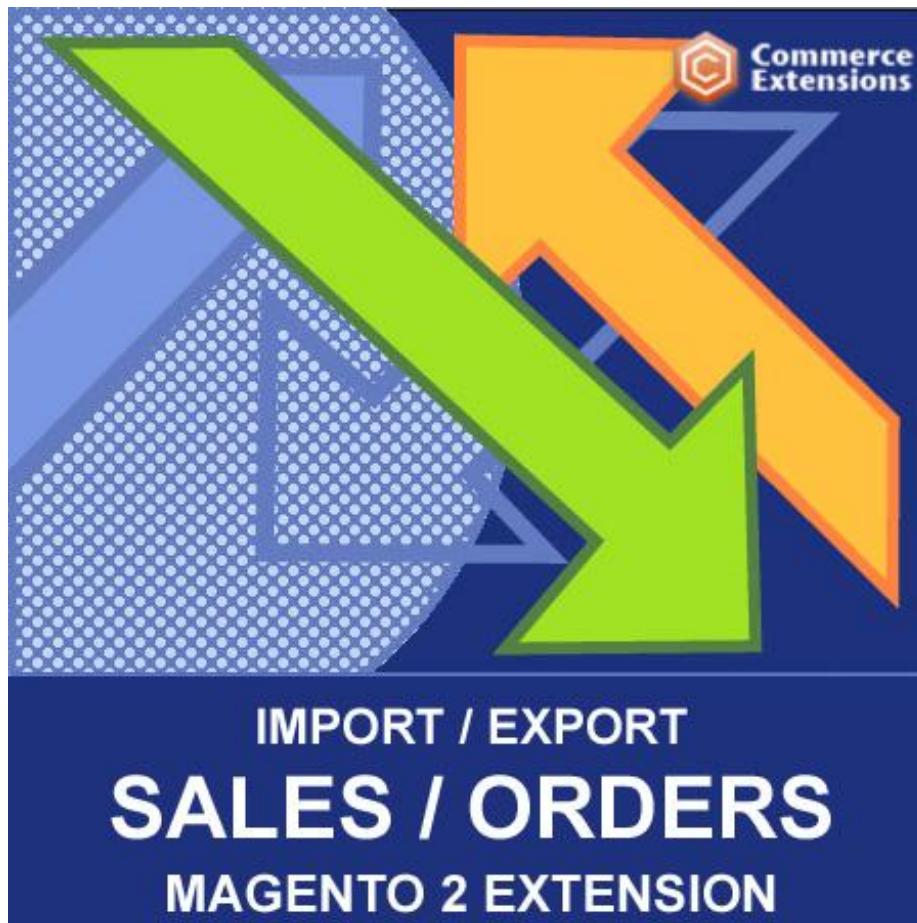


# MAGENTO 2 IMPORT/EXPORT SALES/ORDERS



## User Guide

## Important Notice

CommerceExtensions reserves the right to make corrections, modifications, enhancements, improvements, and other changes to its products and services at any time and to discontinue any product or service without notice.

Customers should obtain the latest relevant information before placing orders and should verify that such information is current and complete. All products are sold subject to CommerceExtensions terms and conditions of sale supplied at the time of order acknowledgment.

CommerceExtensions warrants performance of its products to the specifications applicable at the time of sale in accordance with CommerceExtensions standard warranty. Testing and other quality control techniques are used to the extent CommerceExtensions deems necessary to support this warranty. Except where mandated by government requirements, testing of all parameters of each product is not necessarily performed.

CommerceExtensions assumes no liability for applications assistance or customer product design. Customers are responsible for their products and applications using CommerceExtensions components. To minimize the risks associated with customer products and applications, customers should provide adequate design and operating safeguards.

CommerceExtensions does not warrant or represent that any license, either express or implied, is granted under any CommerceExtensions patent right, copyright, mask work right, or other CommerceExtensions intellectual property rights relating to any combination, machine, or process in which CommerceExtensions products or services are used. Information published by CommerceExtensions regarding third-party products or services does not constitute a license from CommerceExtensions to use such products or services or a warranty or endorsement thereof. Use of such information may require a license from a third party under the patents or other intellectual property of the third party, or a license from CommerceExtensions under the patents or other intellectual property of CommerceExtensions.

Resale of CommerceExtensions products or services with statements different from or beyond the parameters stated by CommerceExtensions for that product or service voids all express and any implied warranties for the associated CommerceExtensions product or service and is an unfair and deceptive business practice. CommerceExtensions is not responsible or liable for any such statements.

All company and brand products and service names are trademarks or registered trademarks of their respective holders.

# Table of Contents

1 Extension Overview .....	4
2 Extension Installation .....	6
3 Extension Usage .....	7
4 Support .....	11

## 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 disable all emails to customers before import by going to Stores->Configuration->Advanced->System and then disabling all email communications before importing. **Don't forget to restore your email settings when you are done!**

Mail Sending Settings

Disable Email Communications	<input type="text" value="No"/>
Host	<input type="text" value="localhost"/> <small>For Windows server only.</small>
Port (25)	<input type="text" value="25"/> <small>For Windows server only.</small>
Set Return-Path	<input type="text" value="No"/>

- You can specify a date range of orders you want to export by selecting a date range:

The screenshot shows the 'Export Orders' dialog box. At the top, there are 'From:' and 'To:' fields, each with a calendar icon. Below these fields is a date range selection calendar. The calendar shows the month of September 2016. The days of the week are listed at the top: Sun, Mon, Tue, Wed, Thu, Fri, Sat. The dates are arranged in a grid. The date '7' is highlighted with a blue border. Below the calendar grid are two buttons: 'Go Today' and 'Close'.

- 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:

The screenshot shows a dropdown menu titled 'Export Historical Product Data'. The menu is open, showing three options: 'No', 'No', and 'Yes'. The second 'No' option is highlighted with a blue background.

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.



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 the same tax setup or the tax setup does **NOT**, you likely need to set this item to **Yes**:

Export Historical Tax

No	▲
No	
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.

7. **ON import**, if you want to generate invoices, set the following item to **“Yes”**. **“No”** means no invoices are generated:

Create Invoices

No	▲
No	
Yes	

8. **ON import**, if you want to generate shipments, set the following item to **“Yes”**. **“No”** means no shipments are generated:

Create Shipments

Yes	▲
No	
Yes	

9. **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	

10. 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	

11. 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 1 hour of FREE email support and 6 months of FREE updates for any extension developed for Magento 2.

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