FME EXTENSIONS

M2

ORDER ARCHIVE

EXTENSION FOR MAGENTO 2

USER GUIDE

Intended Audience

The content of this document is designed to facilitate the users - managers, supervisors, and others of **Order Archive** Extension for Magento 2. A step by step instruction has been added to this document to help users to install the extension on Magento 2.

This extension will only work on Magento 2. As a safe practice always backup your files and database before installing any extension on Magento. If you are looking for someone to install the extension, we can do it for you as well. Just go to the following link and let support know the order id to expedite the installation process.

Once you have installed please see the User Guide to help you understand how to use the extension to its full capacity. If you still have questions, feel free to contact us on our website.
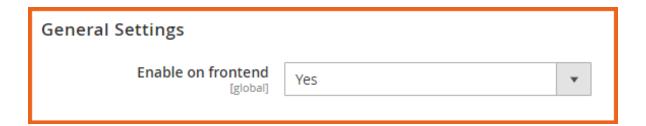
TABLE OF CONTENTS

USER GUIDE

After installation of the extension, make sure the setup is upgraded and static-contents are deployed. Login to the admin panel and flush your Magento cache storage.

HOW TO CONFIGURE THE EXTENSION

At the back end, go to **SALES > Configurations**. Here you can find the following settings:

GENERAL SETTINGS

- **Enable on Frontend:** Select '**Yes**' or '**No**' to Enable/Disable the module on the frontend
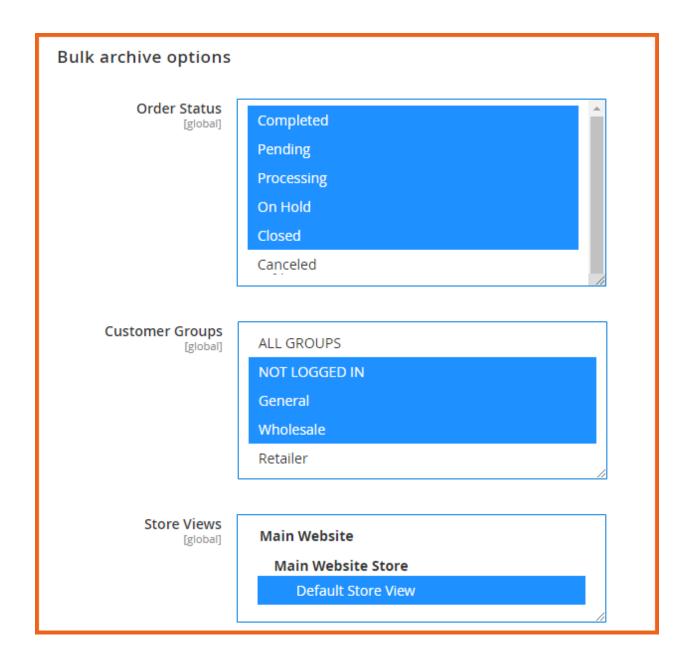

BULK ARCHIVE OPTIONS

- **Order Status:** There is a list of order statuses. You can choose any order statuses and they will be archived. (**Note:** Orders from selected order statuses will be archived)

- **Store Views:** Option to select the store views where you want to display the bar.

- **Customer Groups:** Option to choose the customer groups whom order(s) you want to archive.

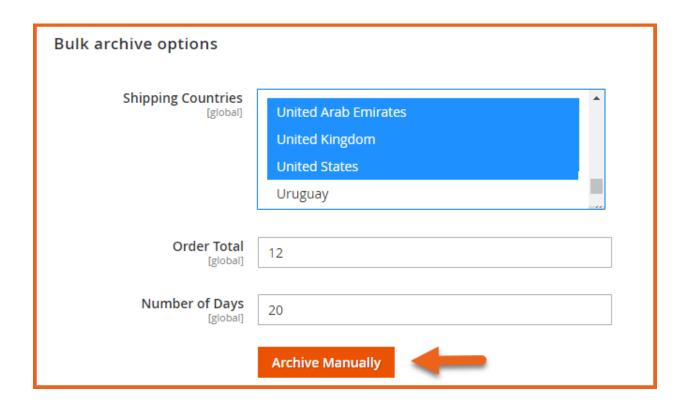 - **All Groups**

  - **Not Logged In**

  - **General**

  - **Wholesale**

o **Retailer**

- **Store Views:** Option to choose the store views whom order(s) you want to archive.

Bulk archive options

Order Status
[global]

Completed

Pending

Processing

On Hold

Closed

Canceled

Customer Groups
[global]

ALL GROUPS

NOT LOGGED IN

General

Wholesale

Retailer

Store Views
[global]

Main Website

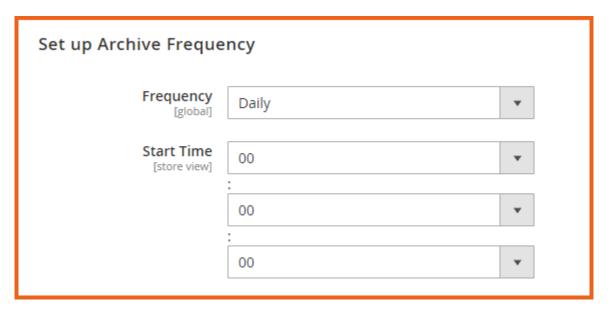**Main Website Store**

Default Store View

- **Shipping Countries:** Option to choose the shipping countries whom order(s) you want to archive.

- **Order total:** Option to set the price limit of the order which you want to archive. Orders having an amount less than the order total will be archived.

- **Number of Days:** Option to set the number of days before the order gets archived automatically.

- **Archive Manually:** Option to archive the orders manually. To archive the orders manually, you have to save the above-mentioned settings first and then click on the "**Archive Manually**" button.
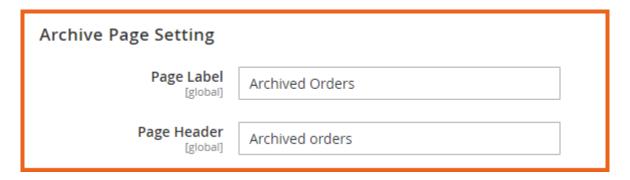
SET UP ARCHIVE FREQUENCY

- **Frequency:** Specify the frequency for archiving orders:

    o **Daily**

    o **Weekly**

    o **Monthly**

- **Start Time:** Specify the time when the order archiving process will occur
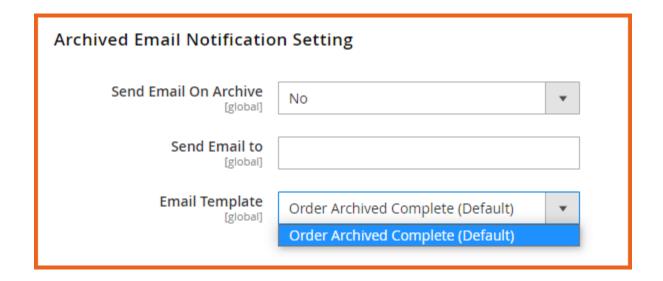

ARCHIVE PAGE SETTING

- **Page Label:** Option to set the page label of archived orders **e.g.** Archived Orders

- **Page Header:** Option to set the heading of the page for archived orders

ARCHIVED EMAIL NOTIFICATION SETTING

- **Send Email on Archive:** Select '**Yes**' or '**No**' to send an email notification when an order is archived.

- **Send Email To:** Option to provide the email address on which notification should be sent when an order is archived.

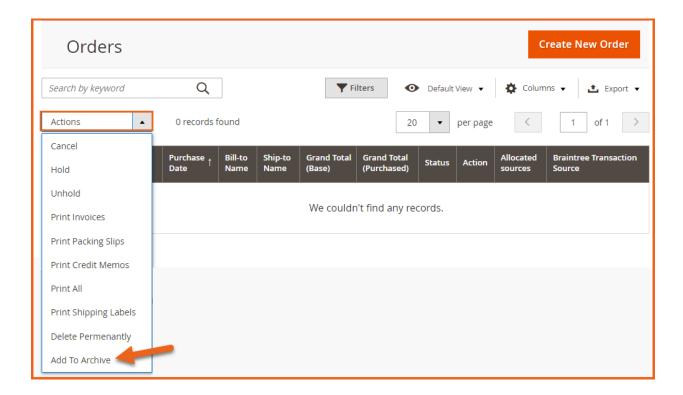- **Email Template:** Option to choose the email template for order archive notification
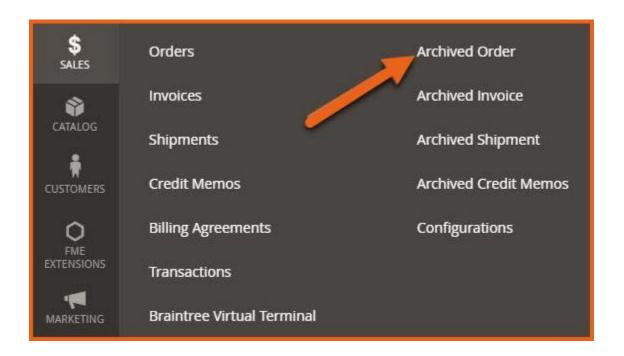
HOW TO ARCHIVE THE ORDERS

At the back end, go to **SALES > Orders**. Here you can find all the orders in a grid. Here you have to perform two steps initially:
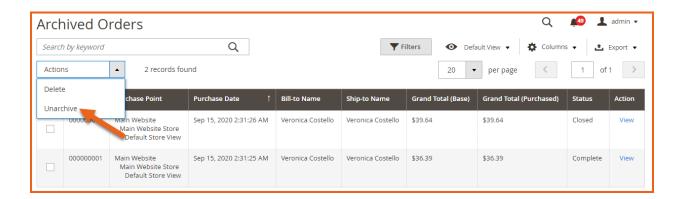
- **Step# 1:** Select the order(s) which you want to archive as shown in the below image.

- **Step# 2:** Click on the "**Actions**" button at the Left-top, a drop-down menu will appear with several options. By clicking on the "**Add to Archive**" button, the selected order(s) will be removed from the orders grid and moved to the Archived Orders section.

- To review the archived orders, go to **SALES > Archived Orders**. Here you will find all the archived orders in a grid. You can also find Archived Invoice(s), Archived Shipment(s) & Archived Credit Memo(s) by clicking on the relevant buttons as shown in the image below.

- You can also unarchive order(s) by navigating at the left top menu "**Actions**" as shown in the image above. After clicking on this button, a drop-down menu will appear. Click on the "**Unarchive**" button to unarchive the order(s) from this grid.
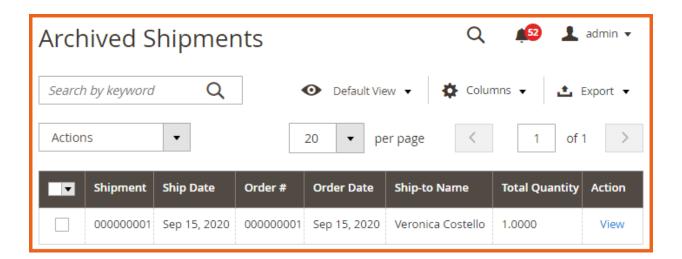
- Further detail of the order can be seen from the "**View**" link. This link lead to order detail of default Magento order detail.

ARCHIVED INVOICE

- Archive invoice detail can be seen from "**View**" link. This link lead to order detail of default Magento invoice detail.
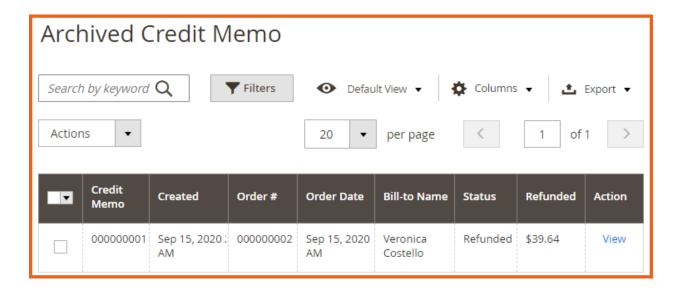
ARCHIVED SHIPMENT

- Archive shipment detail can be seen from "**View**" link. This link lead to order detail of default Magento shipment detail.
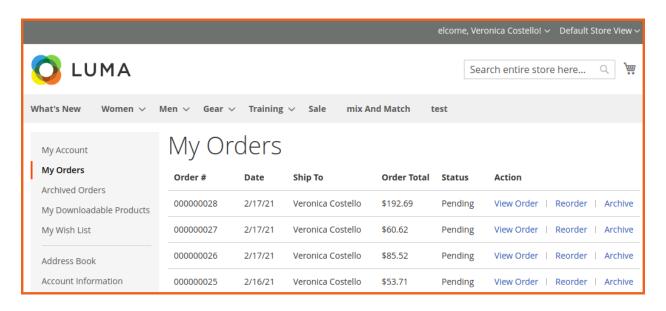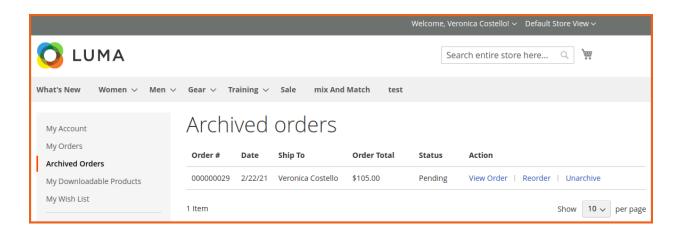
ARCHIVED CREDIT MEMO

- Archive Credit memo detail can be seen from "**View**" link. This link lead to order detail of default Magento credit memo detail.

FRONTEND OPTIONS

- Users can archive their orders according to their preferences and can only see those orders in "**Archive Order** "tab.

  o Place an order on the frontend.

  o Your order will be seen in "**My Orders**" section. Here, you can archive the orders accordingly by simply clicking on the "**Archive**" button on the right side

- **Note:** Customer Archive order have no effect on the admin Archive order.

- If you archive the order related Invoice, Shipment and Credit Memos will also be archived and vice versa.

DISCLAIMER

It is highly recommended to back up your server files and database before installing this module.

No responsibility will be taken for any adverse effects occurring during installation.

It is recommended you install on a test server initially to carry out your own testing.