



FME EXTENSIONS



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 Import Export** 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

INTENDED AUDIENCE..... 2

USER GUIDE..... 4

HOW TO CONFIGURE THE EXTENSION 4

HOW TO ADD EXPORT ORDERS PROFILES 6

HOW TO ADD IMPORT ORDERS PROFILES 18

DISCLAIMER 23



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:

CRON SETTINGS FOR EXPORT

- **Enable:** Option to enable or disable the cron settings for export
- **Frequency:** Specify the frequency of cron
 - Daily
 - Weekly
 - Monthly
- **Start Time:** Specify the time when cron will occur

The screenshot displays the 'Cron Setting For Export' configuration page. On the left, a sidebar shows 'FME EXTENSIONS' with a sub-menu 'Order Export'. The main content area has the title 'Cron Setting For Export' and three configuration fields:

- Enable** [global]: A dropdown menu set to 'Yes'.
- Frequency** [global]: A dropdown menu set to 'Daily'.
- Start Time** [global]: Three dropdown menus for hours, minutes, and seconds, all set to '00'.



CRON SETTINGS FOR IMPORT

- **Enable:** Option to enable or disable the cron settings for import
- **Frequency:** Specify the frequency of cron
 - Daily
 - Weekly
 - Monthly
- **Start Time:** Specify the time when cron will occur

Cron Setting For Import

Enable
[global]

No▼

Frequency
[global]

Daily▼

Start Time
[global]

00▼ : 00▼ : 00▼



HOW TO ADD EXPORT ORDERS PROFILES

At the back end, go to [SALES > Export Orders](#). Here you can find the grid of all your export order profiles. Click on the [Add New Profile](#) or [Edit](#) button to continue.

Order Export

[Add New Profile](#)

<input type="checkbox"/>	Profile ID ↓	Name	Store View	Execution Mode	Action
<input type="checkbox"/>	1		All Store Views	Manual	Select ▼ Edit Delete generate

Now here you have to provide the following information.

GENERAL > PROFILE INFORMATION

- **Automatic Execution:** Enable/Disable the Cron for any specific profile
- **Name:** Provide name for the export profile (**back end use only**)
- **Exclude Child Products:** Options to skip child products on export
- **Exclude Parent Products:** Options to skip parent products on export



ORDER EXPORT INFORMATION

General

Orders Filters

Export File Options

Field Mappings

Run History

Profile Information

Automatic Execution

No

Name *

Exclude child products

No

Exclude parent products

No

GENERAL > STATUS FOR PROCESSED ORDERS

- **Change Status To:** Exported orders will get specified status after export. The status of the order will be updated only in the exported CSV / XML file, not in the database.

Status For Processed Orders

Change status to

Canceled

Canceled

Closed

Complete

Suspected Fraud

On Hold

Payment Review

PayPal Canceled Reversal

PayPal Reversed

Pending

Pending Payment

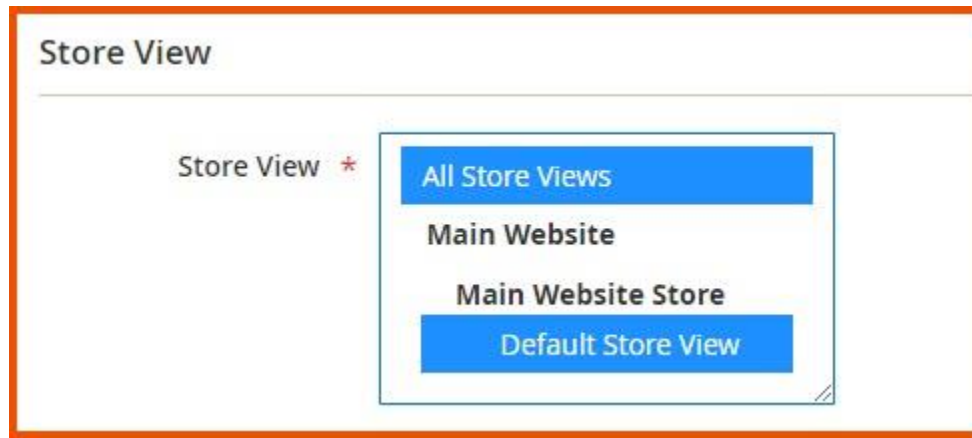
Pending PayPal

Processing



GENERAL > STORE VIEW

- **Store View:** Specify the store view on which it will be applied



ORDER FILTERS > ORDER NUMBER FILTERS

- **Allow Order Filters:** Specify the order number filters from the following
 - No (If selected no filter will be applied)
 - Order Number
 - Order Total Filter
 - Starting From And Ending With Filter

If you select '**Order Number**', you have to provide any specific order number. In the case of '**Order Total Filter**', you have to provide order grand total & if you select '**Starting From And Ending With Filter**', you have to provide the following two fields:

- **Starting From #:** Enter the order number to start export from e.g. 100000040. Leave empty to ignore.
- **Ending With #:** Enter the order number to end export with. Leave empty to ignore.



ORDER EXPORT INFORMATION

General

Orders Filters

Export File Options

Order Number Filters

Allow Order Filters

Starting From And Ending With Filter ▼

Starting From #

Ending With #

ORDER FILTERS > DATE RANGE

- **Set Date Range:** Options to set the date range
 - No
 - Specific Date
 - Start And End date

If you select '**Specific Date**', you have to provide a specific date. In the case of '**Start And End Date**', you have to provide the following two fields:

- **From Date:** Enter a start date
- **To Date:** Enter an ending date

Date Range

Set Date Range

Start And End Date ▼

From Date

TO Date



ORDER FILTERS > CUSTOMER GROUPS

- **Export by Customer Groups:** Select 'Yes' or 'No' to filter order export file by customer groups
 - **For Customer Group:** Select one or more customer groups

A screenshot of a software window titled "Customer Groups". It contains two main sections. The first section, "Export by Customer Groups", has a text label and a dropdown menu currently showing "Yes". The second section, "For Customer Group", has a text label and a list box. The list box is open, showing a blue header "NOT LOGGED IN" and three options: "General", "Wholesale", and "Retailer".

Customer Groups

Export by Customer Groups: Yes ▼

For Customer Group:

- NOT LOGGED IN
- General
- Wholesale
- Retailer

ORDER FILTERS > SHIPMENT FILTERS

- **Use Shipment Filters:** Select 'Yes' or 'No' to use shipment filters for the Profile
 - **Shipping Country:** Select the shipping country
 - **Shipping Method:** Select the shipping method



Shipment Filters

Use Shipment Filters

Yes ▼

Shipping Country

Afghanistan

Aland Islands

Anguilla

Antarctica

Shipping Method

Flat Rate

[flatrate] Fixed

Best Way

[tablerate] Table Rate

ORDER FILTERS > OTHER EXPORT FILTERS

- **Other Filters:** Select 'Yes' or 'No' to use other filters for the profile if available on your store
 - **Order Status:** Select the status of the order
 - **Billing Country:** Select the billing country
 - **Payment Method:** Select the payment method
 - **Customer Name:** Enter the name of the customer
 - **Items Quantity #:** Enter the number of items
 - **Product SKU:** Enter the product SKU. For Multiple SKU, you must write with comma-separated.



Other Export Filters

Other Filters

Yes ▼

Order Status

Canceled

Closed

PayPal Reversed

Billing Country

Afghanistan

Åland Islands

Antarctica

Payment Method

No Payment Information Required

Check / Money order

PayPal Billing Agreement

Customer Name

Items Qunatity #

Product SKU



EXPORT FILE OPTIONS > FILE PROPERTIES

- **File Name:** Only file name required with no extension. Both will be used for the saved file and the one upload via **FTP**. (**Note:** Please don't use "_" in the file name e.g. order_information).
- **File URL:** Provide a URL path for the rule to use. **Example:** "/orderexport/" or "/" for the base path (path must be writeable)

ORDER EXPORT INFORMATION

- General
- Orders Filters
- Export File Options

File Properties

File Name *

File URL *

EXPORT FILE OPTIONS > DATA FORMAT

- **File Format:** Specify the export file data format
 - CSV
 - XML
- **Order Items Delimiter:** If the order has multiple items, then this field works as a separator between items e.g. @, / etc.

Data Format

File Format

XML

XML

CSV - Comma Separated Values

Order Items Delimiter



EXPORT FILE OPTIONS > XML CONFIGURATION

- **XML Main Tag:** Specify the main tag for XML
- **XML Order Tag:** Specify the order tag for XML

XML Configuration

XML Main Tag

XML Order Tag



EXPORT FILE OPTIONS > FTP/SFTP CONFIGURATION

- **Upload Exported File By FTP:** Select 'Yes' or 'No' to upload the exported file by FTP
 - **Protocol:** Select the protocol to upload the exported file
 - **Host Name:** Enter the host name. It can be an IP address or host name. You can add port at the end of host name e.g. **ftp.domain.com:22**
 - **User Name:** Enter the user name
 - **Password:** Enter the password
 - **Directory Path:** Enter the directory path. Full path of a directory e.g. **/var/www/path/to/your-folder/**

FTP/SFTP Configuration

Upload Exported File Via FTP	<input type="text" value="Yes"/> ▼
Protocol	<input type="text" value="FTP"/> ▼
Host Name	<input type="text"/>
User name	<input type="text"/>
Password	<input type="text"/>
Directory Path	<input type="text"/>



EXPORT FILE OPTIONS > E-MAIL SETTINGS

- **Send Exported File via Email:** Select 'Yes' or 'No' to send the exported file via email
 - **E-mail From:** Select the sender of the email
 - **E-mail Address:** Enter the email address
 - **E-mail Message Subject:** Enter the subject of the email message
 - **Compress Exported File in ZIP:** Select 'Yes' or 'No' to compress the exported file in zip

E-mail Settings

Send Exported File via E-mail	<div>Yes</div> <div>▼</div>
E-mail From	<div>General Contact</div> <div>▼</div> <div>General Contact</div> <div>Sales Representative</div> <div>Customer Support</div> <div>Custom Email 1</div> <div>Custom Email 2</div>
E-mail Address	<input type="text"/>
E-mail Message Subject	<input type="text"/>
Compress Exported File in ZIP	<div>No</div> <div>▼</div>



FIELD MAPPINGS > FIELD MAPPING

- **Export Fields:** Options to export all fields or only specific fields

ORDER EXPORT INFORMATION

- General
- Orders Filters
- Export File Options
- Field Mappings**
- Run History

Field Mapping

Export Fields: Export All Fields Export Specified Fields Only

Manage Mappings

DataBase Field	Mapping
---Please Select---	Fill without spaces for XML Delete

Add Mapping

RUN HISTORY

Here you can view all run history if you click on **Generate** the rule as highlighted.

Test ← Back Delete Reset Generate Save and Continue Edit Save

ORDEREXPORT INFORMATION

- General
- Orders Filters
- Export File Options
- Field Mappings**
- Run History

	Run At	File Size	Exported File	Exported Archive
Any				
<input type="checkbox"/>	2019-09-03 11:13:06	21.58KB	Test.csv	Test.zip
<input type="checkbox"/>	2019-09-03 11:13:22	56.93KB	Test.xml	Test.zip
<input type="checkbox"/>	2019-09-04 09:52:54	56.93KB	Test.xml	Test.zip



HOW TO ADD IMPORT ORDERS PROFILES

At the back end, go to **SALES > Import Orders**. Here you can find the grid of all your import order profiles. Click on the **Edit** button or click on the **New Import Profile** button to continue.

Order Import

[New Import Profile](#)

<input type="checkbox"/>	ID ↓	File Name	Admin Name	Created	Action
<input type="checkbox"/>	1	test_zrln2.csv	FME Demo	Apr 17, 2020 2:17:52 PM	Select ▼
<input type="checkbox"/>	2	Import_2019-11-29_09_31_14.csv	FME Demo	Apr 20, 2020 10:00:30 AM	Edit Delete

Now here you have to provide the following information.

ORDER IMPORT INFORMATION > GENERAL INFORMATION

- **Create Customers Based on Billing/Shipping Address:** Select 'Yes' or 'No' to create customers based on billing/shipping address
- **Automatic Execution:** Select 'Yes' or 'No' to enable/disable the automatic execution
 - **Cron Number of Order to be Imported in Single Interval:** If the field left blank, then the module will take default value of 50. If you enter 0, the module will consider all data to import.
- **File Format:** Specify the import file data format
 - CSV
 - XML
- **Import Mode:** Specify the import mode
 - **Merge Existing Data** (if you want to update the existing database)
 - **Replace Existing Data** (Match Order/Entity Id with the existing database. Delete the previous Id, replace it with the new one)



If you select 'Replace Existing Data', then following field will appear:

- **Delete Order Even If It's Invoiced:** Select 'Yes' or 'No' to delete the order even if it invoiced. If you select 'No' here, then again, a new field will appear (**Note:** Its invoices/credit memos/shipments will also be deleted)
 - **What If Any Item is Already Invoiced:** In this case, there are two options:
 - **Merge With Existing Data**
 - **Ignore New Data** (Neither update nor delete any previously existing data)

ORDER IMPORT INFORMATION

General

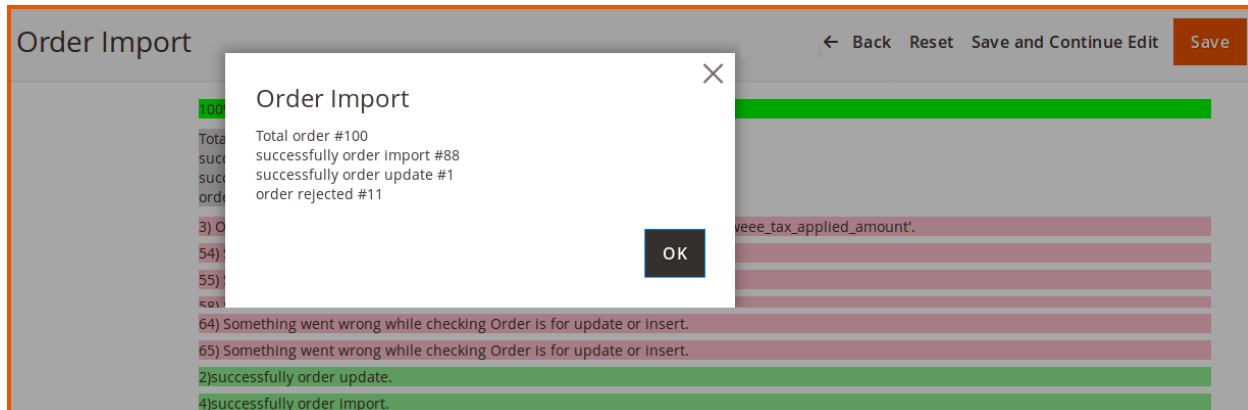
General Information

Create customers based on Billing/Shipping Address	No ▼
Automatic Execution	Yes ▼
Cron number of order to be imported in single interval.	<input type="text"/>
File Format	CSV - Comma Separated Values ▼
Import Mode *	Replace Existing Data ▼
Delete order even if its invoiced?	No ▼
What if any item is already invoiced?	Merge with Existing Data ▼



- **Show Progress Message:** Select 'Yes' or 'No' Show/Hide the progress message while importing the file. It shows Success and Failed orders during the import process. Moreover, this module will also generate error **log file** at the following path:

/var/log/



- **Recalculate Items Incorrect Total:** Select 'Yes' or 'No' to recalculate the items incorrect total
- **Order Items Delimiter:** If the order has multiple items, then this field works as a separator between items e.g. @, / etc.
- **File Type:** Choose the type of file which you want to import:
 - **Sample File** (If you export any order file from your own module, it is considered as a sample file. For this file, **Export All Fields Data** option will be used)
 - **Custom File** (Any file other than sample file will be treated as a custom file. If any user imports any custom file, it must include all the **mandatory columns** of the default Magento database. To import the order file, you have to **map** all the columns of your custom file which are related to the mandatory columns. You can map one column only for **one time**. User should have to map all the fields according to their requirements e.g. if there is a column named 'entity id' in the default Magento database and a column named 'id' in your custom file, then you have to map 'id' against 'entity id' and so on)
- **Attachment:** Upload the file



Recalculate items incorrect total?

No▼

Order Items Delimiter

File Type

Sample File▼

Attachment

Upload

Import Order

Order Import

← Back

Reset

Save and Continue Edit

Save

File Type

Custom File▼

Attachment

Upload

Import Order

try_tzqTX.csv

sales_order.entity_id	▼	---Please Select---	▼
sales_order.state	▼	---Please Select---	▼
sales_order.status	▼	---Please Select---	▼
---Please Select---	▼	---Please Select---	▼
---Please Select---	▼	---Please Select---	▼
---Please Select---	▼	---Please Select---	▼



You can also upload any custom image for your order CSV/XML files. Just go to the following path and paste a PNG image with the same name as written below.

XML => pub/media/orderimport/default/icon-xml.png

CSV => pub/media/orderimport/default/icon-csv.png





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.