MAGENTO V2 OPTILOG EXTENSION
User Manual
BEFORE WE START

Welcome to the user manual for the Aramex Magento V2 Optilog Extension!

Aramex Magento V2 Optilog Extension is used to coordinate the receiving of your products from various suppliers and storing these products in Aramex global warehouses.

Whenever a store customer orders a product that is stored at an Aramex warehouse, you redirect this order to Aramex, and the Aramex ground operations team ships the order to the customer.

This process is enabled by direct communication between the Magento store admin panel and Aramex Optilog warehouse management system (WMS).

Another Aramex product for Magento—Aramex Magento V2 Extension—is designed to streamline the delivery of products that are not stored at an Aramex warehouse.

Use both Aramex Extensions to take care of fulfillment operations cycle of all your orders.

warehousing (storing products in Aramex warehouses)  Inventory management (stock level updates)  order processing, picking, and packing  last mile delivery with multiple carrier options

This document guides you through all aspects of using the Aramex Magento V2 Optilog Extension.

Note: Got a question that we didn’t answer in this document? Help us get better – fill out a feedback form.

aramex.com
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1. HOW THE EXTENSION WORKS

This graph illustrates the workflow and key features of the Aramex Magento V2 Optilog Extension.

- **Customer** adds products to cart and places the order

1. **Pending**
   - Mark the order as paid and ready

2. **Processing (Aramex)**
   - Submit the order

3. **Processed (Aramex)**
   - Synchronize the order

4. **New (Aramex)**
   - Order transferred to Optilog

5. **Issued (Aramex)**
   - Order picked and packed at the warehouse; shipment label attached

6. **Block**
   - The ordered product is not stored at Aramex warehouse

7. **Email sent**
   - Email sent to customer
Here's how this process works, in more detail.

1. When an order is placed by the customer, the order appears in the Magento store admin panel with the \textit{PENDING} status.

2. After the customer pays the shipping cost, you as a store administrator need to mark the order as paid. The order status changes to \textit{PROCESSING(ARAMEX)}, and then:
   - You as a store administrator manually submit the order and it gets the \textit{PROCESSED(ARAMEX)} status. Then, you manually synchronize the order.
   - Order is automatically transferred (submitted and synchronized) to the Optilog WMS as per Extension settings.

   If the products ordered by the customer are not stored in an Aramex warehouse, the order gets the \textit{BLOCKED(ARAMEX)} status.

3. After the order is synchronized (transferred from Shopify to Optilog WMS), the order receives the \textit{NEW(ARAMEX)} status.

4. In the Aramex warehouse, the Aramex ground operations team starts assembling the order. The order may undergo the following statuses:
   - \textit{PART ALLOCATED}
   - \textit{ALLOCATED}
   - \textit{PART PICKED}
   - \textit{PICKED}

5. When the order is picked and packed, and the shipment label is attached, the order gets the \textit{ISSUED(ARAMEX)} status.

6. All shipping details, including HAWB, are updated, and the order becomes \textit{FULFILLED}. You can:
   - View the history of each order on the order details page.
   - Track the shipment status in the Shopify admin.

   Optionally, you can configure the Extension to send an email with the shipment tracking number to the customer.
2. INSTALL THE EXTENSION

If you’re new to Aramex, create an Aramex account at our website and keep your account details at hand – account entity, number, PIN, and site code.

Then, get the Aramex Magento V2 Optilog Extension in one of the following ways:

- Download the Aramex Magento V2 Optilog Extension at the Magento Marketplace. Follow the installation instructions on the Extension page.
- Contact the local Aramex team to get the installation package. Follow the installation instructions provided in the Magento User Guide > Install the Extension article.
3. CONFIGURE THE EXTENSION

The first thing that you need to do after installing the Aramex Magento V2 Optilog Extension is to fill in your Aramex account details. For more information, see Define the Extension settings.

If you configure the Extension to automatically transfer (submit and synchronize) orders to Optilog WMS, you also need to set the Auto Mode interval.

3.1 Define the Extension settings

After installing the Aramex Magento V2 Optilog Extension, you need to fill in your Aramex account details, including account entity, number, PIN, and site code.

Also, you can configure stock level update, automatic order transfer to Optilog WMS, and customer notifications.

To define the Extension settings:

1. In the Magento store admin panel, go to Stores > Configuration.

2. Go to Aramex Optilog > Aramex Optilog Global Settings.
3. Under Optilog client information, fill in the following information.

- **Account Entity** – international code of the area where the account is created (for example, Bombay is BOM, Dubai is DXB, and so on).
- **Account Number** – unique account ID that will be used during shipment preparation.
- **Account Pin** – number used for Aramex account activation. If you do not know your PIN number, you can request it at aramex.com.
- **Site Code** – unique identifier provided to you by Aramex, used to generate IDs of your submitted orders.
- **Auto Mode** – used to automate order transfer to Optilog WMS.
  After you mark an order as Paid and ready for Aramex shipment, the order status changes to Processing(Aramex), and the Extension automatically submits and synchronizes the order.
- **Stock level update** – defines if the quantity of products in the Magento store admin panel is updated. For more information on how to view product quantity, see Check stock level update.
- **Inform customer by e-mail about shipment** – used to automate customer notifications.
  After an order is synchronized, its status changes to Issued(Aramex), and the Extension automatically sends an email with the shipment tracking number to the customer.

4. Click Save Config.

If you set Auto Mode to Yes, you need to define the interval for automatic stock level updates. For more information, see Set the Auto Mode interval.
3.2 Set the Auto Mode interval

When defining the Extension setting, you had an Auto Mode option for configuring the Extension to automatically transfer (submit and synchronize) orders to Optilog WMS.

If you set Auto Mode to Yes, you need to define the interval for automatic stock level updates.

To set the Auto Mode interval:

1. In the Magento store admin panel, go to Stores > Configuration. Check that in Aramex Optilog Global Settings, the Auto Mode option is set to Yes. For more information, see Define the Extension settings.

2. Go to Advanced > System.
3. Under Cron (Scheduled Tasks), go to Cron configuration options for group: aramexoptilog_optilog_status.

4. In Generate Schedules Every, define the interval for automatic stock level updates. For example, if you enter 2, then every 2 minutes, the Extension will automatically submit and synchronize all new Processing(Aramex) orders, and their status will change to New(Aramex).

5. Refresh the system cache in the following way:
   a. In the Magento store admin panel, go to Stores > Cache Management
b. Select all entries, and then click **Submit**.

<table>
<thead>
<tr>
<th>Cache Type</th>
<th>Description</th>
<th>Tag</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Configuration</td>
<td>Various XML, configurations that were collected across modules and merged</td>
<td>CUSTOMERS</td>
<td>DISABLED</td>
</tr>
<tr>
<td>Layouts</td>
<td>Layout building instructions</td>
<td>CUSTOMER_LAYOUTS</td>
<td>DISABLED</td>
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<tr>
<td>Model Metadata</td>
<td>Model metadata files</td>
<td>CUSTOMER_MODELS</td>
<td>DISABLED</td>
</tr>
<tr>
<td>Collection Data</td>
<td>Collection data files</td>
<td>COLLECTION_DATA</td>
<td>DISABLED</td>
</tr>
<tr>
<td>Reflection Data</td>
<td>API reference, reflection data</td>
<td>REFLECTION_DATA</td>
<td>DISABLED</td>
</tr>
<tr>
<td>Diligent DDL</td>
<td>Results of DDL queries, such as describing tables or indexes</td>
<td>DDL_DDL</td>
<td>DISABLED</td>
</tr>
<tr>
<td>Env Types</td>
<td>Env types declaration cache</td>
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<tr>
<td>Customer Data</td>
<td>Customer data files</td>
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<td>Cache</td>
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<td>Integrations</td>
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<td>REST and SOAP configuration files</td>
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</tbody>
</table>

Whenever a new **Pending** order appears, you need to manually **mark the order as paid**.

After this, the orders get the **Processing(Aramex)** status, and the Extension automatically submits and synchronizes the order according to the interval defined in step 4.

As a result, the submitted and synchronized order gets the **New(Aramex)** status, and in the Aramex warehouse, the Aramex ground operations team starts assembling the order.

When the order gets the **Issued(Aramex)** status, you can:

- **Check stock level update** (if enabled in Extension settings).
- **Track shipment status**.
4. MARK ORDER AS PAID

When an order is placed by the customer, the order appears in the Magento store admin panel with the Pending status.

After the customer pays the shipping cost, you as a store admin need to mark the order as paid. While order submission and synchronization can be automated, marking order as paid is something that you always need to do manually.

To mark order as paid:

1. In the Magento store admin panel, go to Sales > Orders.
2. Next to the needed Pending order, click View.
3. Click Paid and ready for Aramex shipment.
4. In the Success message, click OK.

The order status changes to Processing(Aramex), and then:

- You can submit the order manually.
- If auto mode is configured, order submission and synchronization is done automatically. In this case, wait till the order gets the Issued(Aramex) status, and then:
  - Check stock level update (if enabled in Extension settings).
  - Track the shipment status.
5. SUBMIT ORDERS MANUALLY

After you mark an order as paid, the order is ready to be submitted to the Optilog WMS. You can submit several orders in one go.

Note: If auto mode is configured in Extension settings, orders are submitted automatically. In this case, after the defined time interval, check if the order status changed to New(Aramex).

After the order gets the Issued(Aramex) status, you can:

- Check stock level update (if enabled in Extension settings).
- Track the shipment status.

To submit one or more orders manually:

1. In the Magento store admin panel, go to Sales > Orders.
2. Select the needed Processing(Aramex) orders, and then click Bulk Submit Optilog Order.

Confirmation message appears with the following information.

- **Order** – IDs of one or more submitted orders.
- **Order reference** – ID of the new bulk order.

The status of the submitted orders changes to Processed(Aramex).

Warning: If you try to submit an order that has a status other than Processing(Aramex), the following error occurs: Order: <order number> is not valid.
6. SYNCHRONIZE ORDERS MANUALLY

After you submit an order manually, the order is ready to be synchronized, that is, transferred to the Optilog WMS. You can synchronize several orders in one go.

Note: If auto mode is configured in Extension settings, order synchronization is done automatically. In this case, after the defined time interval, check if the order status changed to New(Aramex).

After the order gets the Issued(Aramex) status, you can:

- Check stock level update (if enabled in Extension settings).
- Track the shipment status.

To synchronize one or more orders manually:

1. In the Magento store admin panel, go to Sales > Orders.
2. Select the needed Processed(Aramex) orders, and then click Bulk Synchronize Optilog Order.

You can view the confirmation with IDs of the synchronized orders.

The submitted and synchronized orders get the New(Aramex) status, and the Aramex ground operations team starts assembling the shipments.

Wait till the orders get the Issued(Aramex) status, and then:

- Check stock level update (if enabled in Extension settings).
- Track the shipment status.

If configured, the Extension sends an email to the customer with the shipment tracking number. For information on how to configure notifications, see Define the Extension settings.
7. CHECK STOCK LEVEL UPDATE

You can verify the stock level (quantity) of each product that is currently stored in an Aramex warehouse directly from your Magento store admin panel.

**Note:** Stock level update is performed only if in Extension settings, the **Stock level update** option is enabled. For information on how to enable this setting, see [Define the Extension settings](#).

To check stock level update for a product:

- In the Magento store admin panel, go to **Products > Catalog**.

For each product, you can view the product quantity available at an Aramex warehouse.

Whenever a store customer orders this product, and the order gets the **Fulfilled** status, the product quantity is updated.

For information on how to manage product stock, see the Magento User Guide > Stock Availability article.
8. TRACK SHIPMENT STATUS

When an order is picked and packed, and the shipment label is attached, the order gets the Fulfilled status.

At this point, you can track the shipment status in the Magento store admin panel.

Optionally, you can configure the Extension to send an email to the customer with the shipment tracking number. For more information, see Define the Extension settings.

To track shipment status:

1. In the Magento store admin panel, go to Sales > Orders.
2. Next to the needed Issued(Aramex) order, click View.
3. Under Order View, go to Shipments.
4. Next to the needed shipment, click **View**.

5. Under **Shipping and Tracking Information**, and next to the needed shipment, click the shipment (HAWB) **Number**.

6. Under **Tracking Information**, click the provided link. You can view the shipment summary, history, and details.
This diagram illustrates the key shipment statuses.

- **picked up from shipper**
- **record created**
- **received at origin facility**
- **in transit**
- **(for international shipments) shipment is undergoing customs clearance**
- **receiver’s address is incorrect/incomplete, cannot contact the receiver, etc.**
- **out for delivery**
- **held for consignee pickup / pickup scheduled at locker**

Your shipment is at the shipper’s facility.

- Shipment was registered in the Aramex system
- Shipment arrived at the Aramex warehouse

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