

IMPORT/EXPORT ORDERS



User Guide

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Extension Overview

This is a true 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. You can also specify your own clear text password on import.

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.

EXTENSION FEATURES:

- * Import/export orders for any product type (simple/simple with custom options/configurable/grouped/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
- * Import orders with any payment method even if it its not enabled and/or doesn't exist
- * 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 orders migrations from older Magento installs into new Magento installs
- * Supports all version of Magento (community, professional, enterprise edition)

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. Log into Magento Admin Panel
4. If Cache Control is enabled in Magento go to 'System > Cache Management' section, select 'Refresh' under 'All Cache' drop-down menu and press 'Save Cache Settings'
5. Now go to System > Import / Export > Commerce Extensions -> Order Import/Export and you can use the profiles from here to import and export.
6. **OPTIONAL** – you can setup either import/export profiles as a cron job see this url ->

http://www.commerceextensions.com/how_to_setup_cron_job

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. Alternatively, use the (XML) versions for the profile and the Excel worksheet 2003 XML 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. Overall the extension is very straight forward. You can find in magento admin under

system -> import/export -> Commerce Extensions Orders
Import/Export

import orders
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 ftp to var/import and run the import profile and it will import it back in.

3. You can disable all emails to customers before import by going to System->Configuration->Sales Emails and then disabling all email communications before importing. **Don't forget to restore your email settings when you are done!**
4. You can specify a date range of orders you want to export by editing the following lines:

Date From:	<input type="text" value="2016-08-30"/>	
Date To:	<input type="text" value="2017-08-31"/>	

5. You can specify the status of orders you want to export by settings the type (some possible types “canceled”, “closed”, “fraud”, “holded”, “payment_review”, “pending_paypal”, “processing”, “pending”, “complete”):

Filter By Order Status:

6. You can control the orders that export by STOREID.

Store:

7. You can optionally filter orders on export by payment type by supplying the payment method code e.g ("check_mo" = method for check and money order or "purchase_order" for Purchase Order etc)

Filter By Payment Method:

8. 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 true:

Export Product Pricing

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 “true”, the export will result in 0.00 pricing for all ordered/products not in the store.

9. 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 true:

Export Product Tax Percent

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

10. FOR ORDER TRANSFERS: If you want to export orders with the addressess uses for that order then set Export Order Address to Yes. If it is set to false then the default billing and shipping address of the registered customer will be exported for the order details with the exception of guest orders which always export the order address.

Export Order Address
Always

11. ON import, if you want to generate invoices, set the following item to "true". "false" means no invoices are generated:

Create Invoice:

12. ON import, if you want to generate shipments, set the following item to "true". "false" means no shipments are generated:

Create Shipment:

13. ON import, if you want to force your own tax amount and tax percentage, set the following item to “true”. “false” 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:

14. 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 “true”. “false” 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:

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

Update Customer Address:

16. If you want to “UPDATE” orders using [“import_order_update_example.csv”](#), make sure this line is in your import profile XML and set to true:

Update Orders:

****NOTE THIS UPDATE IS ONLY FOR MARKING ORDERS SHIPPED AND ADDING TRACKING NUMBERS TO AN ORDER.**

Support

CommerceExtensions offers 1 hour of FREE email support and 1 year of FREE updates for any extension developed for Magento.

If you need support related to CommerceExtensions extension usage, feel free to contact me at scottbolasevich@gmail.com