

# User manual



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## Intro

The orders2csvPRO module from ext4mage.com lets you export your order, invoice, shipment and creditmemo information to a CSV file with ease. You can easily make new file structures, where you though the orders2csv admin pages, can setup which fields shall be included in the CSV file. You can use many different variables in the export and it is also possible to make use of simple logic to general field value. You can setup schedules where you define which order, invoices, shipments or creditmemos shall be exported based on status or states, then send the CSV file to a defined email address.

This document is a guide to teach you how to use the module. For installation instructions please see the installation manual.

## System options

Set up the general options for the use of the module.

**Orders2csvpro**
Save Config

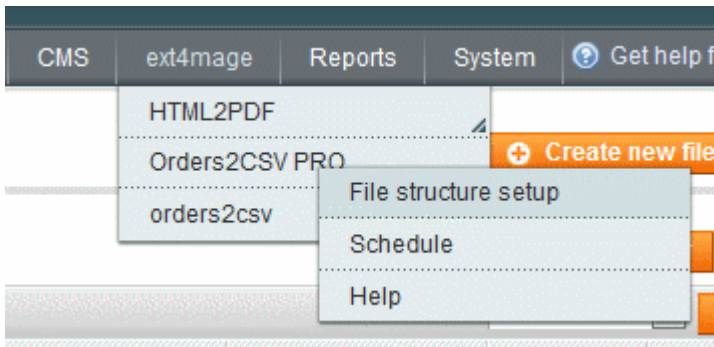
**General Settings**

Is modul active	<input type="text" value="Yes"/>	[WEBSITE]
File structure - Order	<input type="text" value="Select file structure"/>	[WEBSITE]
File structure - Invoice	<input type="text" value="Select file structure"/>	[WEBSITE]
File structure - Shipment	<input type="text" value="Select file structure"/>	[WEBSITE]
File structure - Creditmemo	<input type="text" value="Select file structure"/>	[WEBSITE]
License code	<input type="text" value="0"/>	[STORE VIEW]
Order id for preview	<input type="text" value="100000025"/>	[STORE VIEW]
	<small>▲ Please suply an order id that can be used for help pages</small>	
Product in order for help	<input type="text" value="126"/>	[STORE VIEW]
	<small>▲ Please suply an product id that can be used for help pages (product must exist in above order)</small>	
Bundle product in order for help	<input type="text" value="164"/>	[STORE VIEW]
	<small>▲ Please suply an bundle product id that can be used for help pages (product must exist in above order)</small>	
Invoice number for preview	<input type="text" value="100000004"/>	[STORE VIEW]
	<small>▲ Please suply an invoice number that can be used for preview function and help pages</small>	
Product in invoice for help page	<input type="text" value="123"/>	[STORE VIEW]

Field description:

- *Is module active* – whether or not the orders2csv module shall be used. Only when set to Yes the action will be shown in orders grid.
- *File structure* – which file structure shall be used to generate the CSV file in Order, Invoice, Shipment and Credit memo grid
- *License code* – the code you are given from ext4mage when buying this module
- *Order id for preview* – used in help function of the module
- *Product in order for help* – used in help screen, the specified product id must be contained in the above specified order
- *Bundle product in order for help* - used in help screen, the specified product id must be contained in the above specified order
- *Invoice number for preview* – used in help function of the module
- *Product in invoice for help* – used in help screen, the specified product id must be contained in the above specified invoice

## File structure setup



Here you setup all information need to generate a CSV file from your orders. You find it under ext4mage in the navigation bar at the top of the page.

## Grid overview

The first screen you will see is the grid overview, here all file structures are listed. By clicking on either the row or the edit link on the right side, you will get to the edit page of that element. You can also create a new one by clicking on the Create new file structure button.

**Orders2CSV PRO file structure** + Create new file structure

Page 1 of 1 pages | View 20 per page | Total 6 records found Reset Filter Search

Select All | Unselect All | Select Visible | Unselect Visible | 0 items selected Actions Submit

	ID ↑	Title	Created at	Updated at	Status	Action
Any ▾			From: <input type="text"/> To: <input type="text"/>	From: <input type="text"/> To: <input type="text"/>	<input type="text"/>	
<input type="checkbox"/>	1	DanishVatEUSale	--	--	Enabled	<a href="#">Edit</a>
<input type="checkbox"/>	2	BasicOrderInfo	--	--	Enabled	<a href="#">Edit</a>
<input type="checkbox"/>	3	BasicItemInfo	--	--	Enabled	<a href="#">Edit</a>
<input type="checkbox"/>	4	BasicInvoiceInfo	--	--	Enabled	<a href="#">Edit</a>
<input type="checkbox"/>	5	BasicShipmentInfo	--	--	Enabled	<a href="#">Edit</a>
<input type="checkbox"/>	6	BasicCreditmemoInfo	--	--	Enabled	<a href="#">Edit</a>

## General – element information

Either way you choose the first screen you will see is the one below, here you setup the general stuff about the file structure that is selected.

**Orders2CSV PRO File structure**

General

File structure columns

**Edit File structure 'BasicItemInfo'**

**Element information**

Title *	<input type="text" value="BasicItemInfo"/>
Status *	<input type="text" value="Enabled"/>
Type *	<input type="text" value="Order"/>
Change to this status after manual run	<input type="text" value="Do not change"/>
Delimiter *	<input type="text" value=","/>
Enclosure *	<input type="text" value="\"/>

Field description:

- *Title* – The title of the file, will also be used as filename on generation
- *Status* – The status of this element, only enabled will show up in configuration
- *Type* – Define the type of the file structure, values are Order, Invoice, Shipment and Creditmemo
- *Change to this status after manual run* – Select if the elements status should be changed after run
- *Delimiter* - This is the delimiter to be used in the generated CSV file
- *Enclosure* – Set the character to be used to enclose value in the CSV file

## File columns

The next thing you want to setup in your file structure, is the different columns. There is no limit to how many columns that you can have.

Field description:

- *Title* – The title of the column, also to be used in the head row of the CSV file
- *Value* – Put in the variable that shall be in the column, you can see all variable available in the help section of the extension – see more about how to use variables into the sections *Variable use in column value*, *Formatting variables* and *Coding inline in value field*.
- *Sort order* – In which order this column shall be shown, from left to right

The CSV file is buildup in the following way, that if it contains item, option or bundle variables it generates extra row for each of these, each of these repeating the order information. Let me try to explain it with an example.

You want to export 1 order, with 2 items in. One item has 2 options and the other is a bundle with 3 elements, then the column value will determent how many rows it generated like this:

<i>Contains values</i>	<i>Order rows</i>	<i>Item row</i>	<i>Option/Bundle rows</i>	<i>Total rows</i>
Only order value	1			1
Order and item values	1	2		3
Order, item, options	1	2	2	5
Order, item, bundle	1	2	3	6
Order, item, option, bundle	1	2	5	8

### Variable use in column value

There are a lot of variables at your disposal. All variables that exist in Orders2CSVPRO are shown in the help section, and you can also use default Magento variables. The way that you indicate a variable, is by using the format shown below in code example.

<pre> {{variable_code}} {{order data status}}                 </pre>	the format example, will print the status of the order
--	---

The variables are divided up into different types. A general section which can be used in all types of CSV's.

**Orders2CSV PRO Help**
Export to: CSV Export

Object	Key	Example value
Order data	order_data_entity_id	7
Order data	order_data_state	complete
Order data	order_data_status	complete
Order data	order_data_coupon_code	
Order data	order_data_protect_code	4d4814
Order data	order_data_shipping_description	Flat Rate - Fixed
Order data	order_data_is_virtual	0
Order data	order_data_store_id	1

And there a variables that can only be used in different types. There are groups of variables for invoice, shipment and credit memo, which can only be used in that CSV types.

**Orders2CSV PRO Help**
Export to: CSV Export

Object	Key	Example value
Invoice data	invoice_data_entity_id	4
Invoice data	invoice_data_store_id	1
Invoice data	invoice_data_base_grand_total	3823.9100
Invoice data	invoice_data_shipping_tax_amount	0.0000
Invoice data	invoice_data_tax_amount	288.9400
Invoice data	invoice_data_base_tax_amount	288.9400
Invoice data	invoice_data_store_to_order_rate	1.0000
Invoice data	invoice_data_base_shipping_tax_amount	0.0000

Variables related to product are found under each type, and general variables that can be used in all type under Product and Product Bundle, which include variables related to the bundle group and the single items in the bundle.

## Formatting variables

There are some standard formatting options available in the Orders2CSVPRO module. These formatting can be used on all variables, whether or not they are computed or single. The last tab in help pages, is a list of all the available formatting options.

Orders2CSV PRO Help		Export to: CSV <span>Export</span>	
	Input value	Key	Example value
General	1245.1248	format_price_bt	â€1,245.12
Invoice	1245.1248	format_currency	<span class="price">â€1,245.12</span>
Shipping	1245.1248	format_price	<span class="price">â€1,245.12</span>
Creditmemo	1245.1248	format_base_price	<span class="price">â€1,245.12</span>
Product	1245.1248	format_convert_price	1245.1248
Product Bundle	2011-11-20 12:15:10	format_date_short	11/20/11
Customer	2011-11-20 12:15:10	format_date_medium	Nov 20, 2011
Formatting types	2011-11-20 12:15:10	format_date_long	November 20, 2011
	2011-11-20 12:15:10	format_date_full	Sunday, November 20, 2011
	2011-11-20 12:15:10	format_time_short	1:15 PM
	2011-11-20 12:15:10	format_time_medium	1:15:10 PM
	2011-11-20 12:15:10	format_time_long	1:15:10 PM CET
	2011-11-20 12:15:10	format_time_full	1:15:10 PM Europe/Berlin
	1245.1248	format_integer	1245
	1245.1248	format_number_1	1,245.1
1245.1248	format_number_2	1,245.12	
1245.1248	format_number_3	1,245.125	
1245.1248	format_number_4	1,245.1248	

You use formatting for a single variable on the way shown below here:

<code>{{formatting variable_code}}</code>	the format
<code>{{format_price order_data_subtotal}}</code>	example, will print the subtotal of order with the correct currency formatting

If you have inline code the formatting of that is as follows

<code>##formatting the_code##</code>	the format
<code>## format_price {{order_data_subtotal}}-{{order_data_discount}}##</code>	example, will print the subtotal minus the discount with the correct currency formatting



### Coding inline in value field

With Orders2CSVPRO inline code you can make the export file very specialized. You can do everything from simple math stuff to very complex PHP code. I will give a short introduction to what you can do, but there is many more options to generate custom values. The format of inline coding in Orders2CSVPRO is as follows

## the_code##	the format
##{order_data_subtotal }-{{order_data_discount}}##	will print the subtotal minus the discount

The above example is very simple, here we just take one value and subtracts another.

The power of this function is very massive, because you can use different types of PHP code directly in the value field. An example could be that you to print the a text and calculate the average item price, this can be done by below code:

**You have ordered {{format\_integer invoice\_data\_total\_qty}} item with an average price of ##{{format\_convert\_price invoice\_data\_subtotal\_incl\_tax}}/{{format\_integer invoice\_data\_total\_qty}}##**

Not all PHP function can be used. Example: *if* expression cannot be used, instead use the conditional operator *?:* - the *eval* function is used in Orders2CSVPRO, you can read more about it on [php.net](http://php.net)

Be sure that you are signed up for ext4mage newsletter, because we will be sending out tips and examples of ways to use inline coding.

## Schedule setup

Under the schedule item you can, do the setup of all the schedules that shall be run. A schedule is when and what shall be sent by email to a receiver automatic. One order will only be sent once per schedule, so that they do not come double entries.

**Magento cron has to be setup – see more here:** [how to setup a cron job](#)

### Grid overview

Here you get an overview off all schedules, with information of title, which file structure is used and when it is last been run automatic. One thing to notice is on the far right, here you can do a test send. That means that a email will be sent based on the schedule, but which orders has been sent will not be logged, and the last run timestamp is not updated.

[+ Create new schedule](#)

Page  of 1 pages | View  per page | Total 4 records found [Reset Filter](#) [Search](#)

Select All | Unselect All | Select Visible | Unselect Visible | 0 items selected Actions  [Submit](#)

	ID ↑	Title	File structure	Last run at	Status	Action
Any ▾	<input type="text"/>	<input type="text"/>	<input type="text"/>	From: <input type="text"/> To: <input type="text"/>	<input type="text"/>	
<input type="checkbox"/>	1	testHour	DanishVatEUSale	Jun 21, 2012 5:05:04 PM	Enabled	<a href="#">Test send</a>
<input type="checkbox"/>	2	testDay	BasicItemInfo	--	Enabled	<a href="#">Test send</a>
<input type="checkbox"/>	3	testWeek	BasicItemInfo	Jun 18, 2012 12:05:00 AM	Enabled	<a href="#">Test send</a>
<input type="checkbox"/>	4	testMonth	BasicOrderInfo	--	Enabled	<a href="#">Test send</a>

## Create/ Edit schedule

In this screen you setup all information about the schedule. The parameters controllers how, what and to who the schedule file structure shall be sent.

### Orders2CSV PRO Schedule

General

#### Edit Schedule 'testitem'

#### Element information

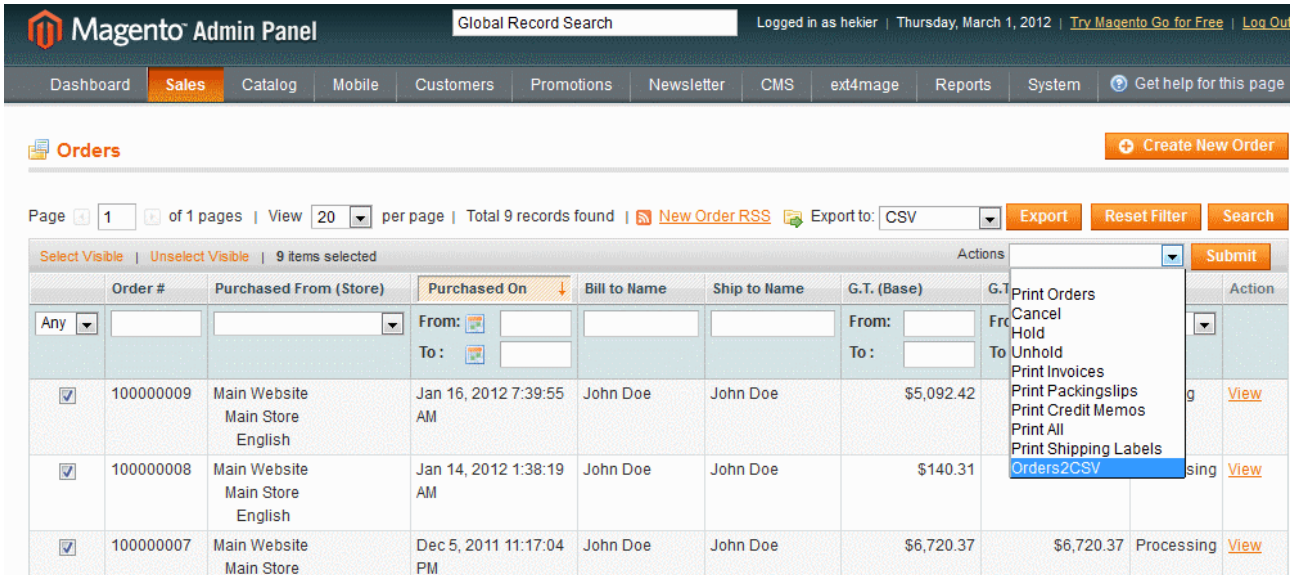
Title (email subject) *	<input type="text" value="testitem"/>
Is active *	<input type="text" value="Enabled"/>
Receiver email-address *	<input type="text" value="henrikker@gmail.com"/>
File structure to use *	<input type="text" value="BasicitemInfo (Order)"/>
Order status to include *	<input type="text" value="Creditmemo - Pending"/>
Change to this status after scheduled run	<input type="text" value="Do not change"/>
Run this *	<input type="text" value="Hourly at 05 minutes"/>
Include header fields *	<input type="text" value="Yes"/>
Attach output as file *	<input type="text" value="Yes - attach as CSV file"/>

Field description:

- *Title* – The title of the schedule also used as email subject
- *Is active* – is the schedule active or not, will be run is active
- *Receiver email* – the email which the file structure shall be sent to.
- *File structure* – which file structure that shall be used to generate the csv that gets sent.
- *Order status* – choose all statuses or a single status, and only orders with that status will be used in the csv file that's get generated.
- *Change to this status after scheduled run* – Select if the order status should be changed after run
- *Run this* – interval that the schedule shall be run
- *Include header* – if the header (column titles) shall be included in the csv
- *Attach output as file* – shall the csv be attached as file or written directly into the email text

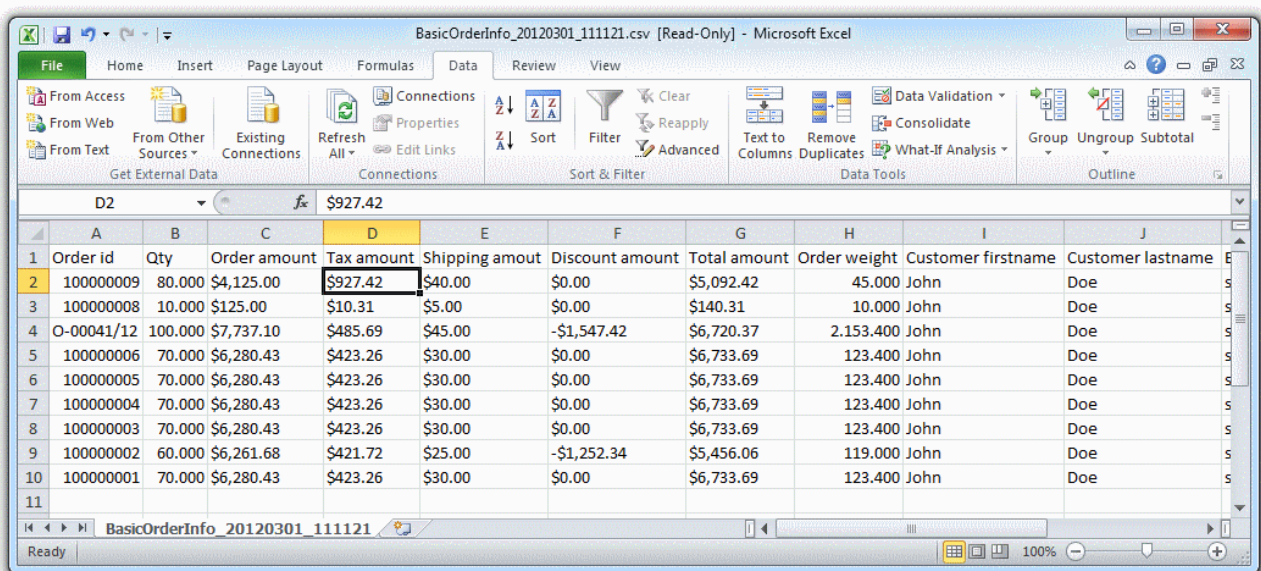
## Save orders to CSV files

In the order grid you on the left select the orders you want to save to a CSV file, and then select Orders2CSV in the Action dropdown box and click the submit button.



## Example of a CSV file

Below is an example of a CSV file generated with the module. Here the Excel function Text to Columns has been used to import the data.



### Opening CSV file in Excel

When you have downloaded or received the CSV file, it can be read by multiple different programs, but one of the most used is Microsoft Excel. To transform the CSV to the tables and columns in Excel you can use the inbuilt function *Text to Columns*, that you find under the Data tab.

