amasty

For more details see how the Export Customers for Magento 2 extension works.

Guide for Export Customers for Magento 2

Level-up your business by connecting Magento instance to multiple external platforms. Export customers directly to CRM, ERP or other systems automatically with Export Customers for Magento 2.

- Export any customer entities
- Filter users by entity values and export only required ones
- Set automatic export by cron or event
- Store export files on local or distant servers, or send by email
- Easily customize columns naming in export files

Export Structure

Amasty Export by now includes 3 separate modules to perform export tasks:

- **Export Customers:** a separate export to deal with customer entities
- **Amasty Export:** suitable for one-time export of any available entity
- **Amasty Export PRO:** a tab to create cron jobs concerning export activity

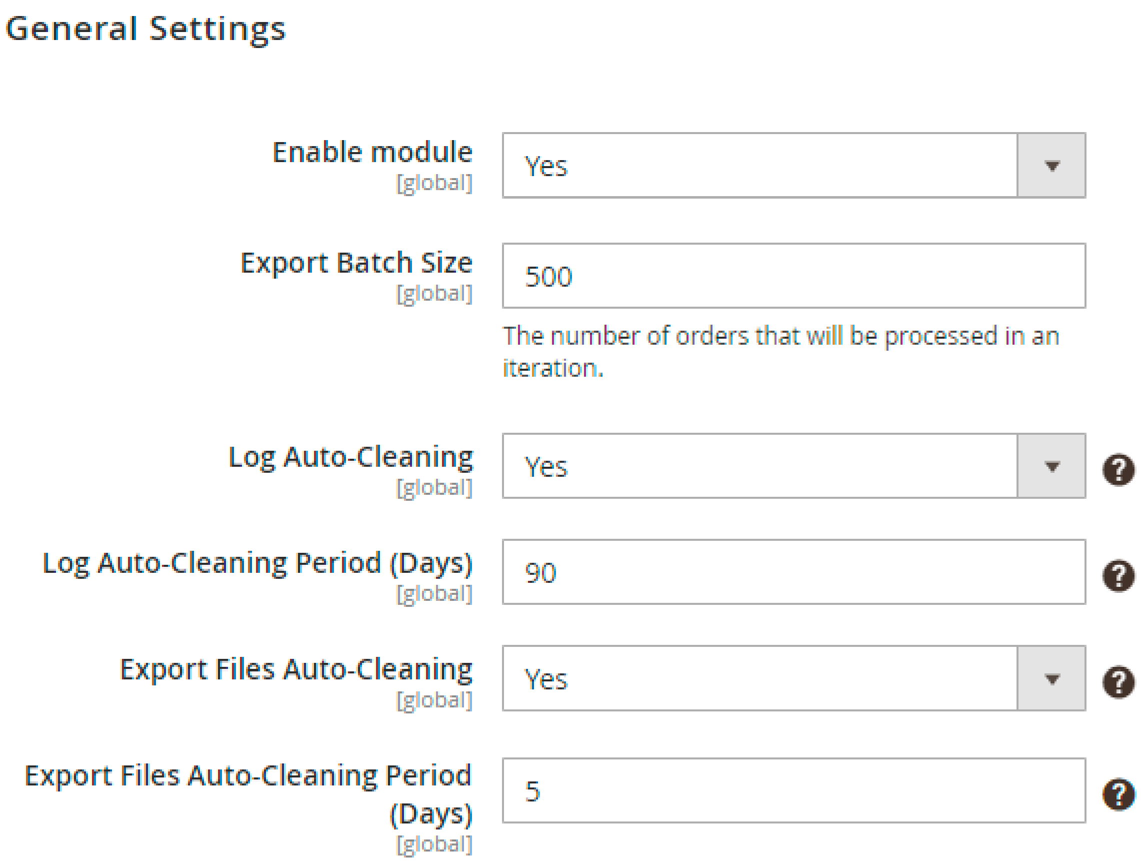
The more Amasty modules you have, the more entities you will be able to export in the first simplified module and in the PRO version. Follow **Import & Export solution updates** to discover new possibilities.

Note, that if your export managers have specific permissions to the admin panel, you need to grant them access to both **Export Customers Profiles** and **Amasty Export**. Otherwise, they won't be able to execute the export.

Export Customers Configuration

Before creating export profiles, please configure the general customer export options.

Go to **Stores → Configuration → Amasty Extensions → Export Customers**.



Enable module - select *Yes* to activate the extension.

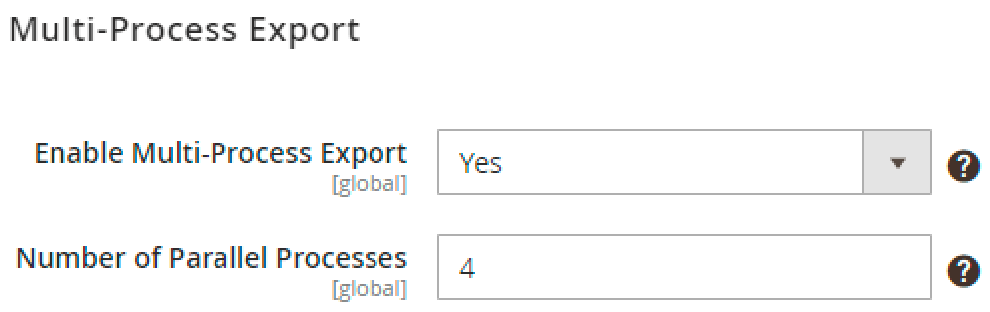
Export Batch Size - specify the number of customers that will be processed in an iteration.

Log Auto-Cleaning - set *Yes* to clean logs automatically. The records will be removed from Export History after the period specified below.

Log Auto-Cleaning Period (Days) - define the period after which export history will be cleaned.

Export Files Auto-Cleaning - if enabled, the generated export files will be automatically removed from the server after the period specified below.

Export Files Auto-Cleaning Period (Days) - define the period after which the files will be removed from the server.



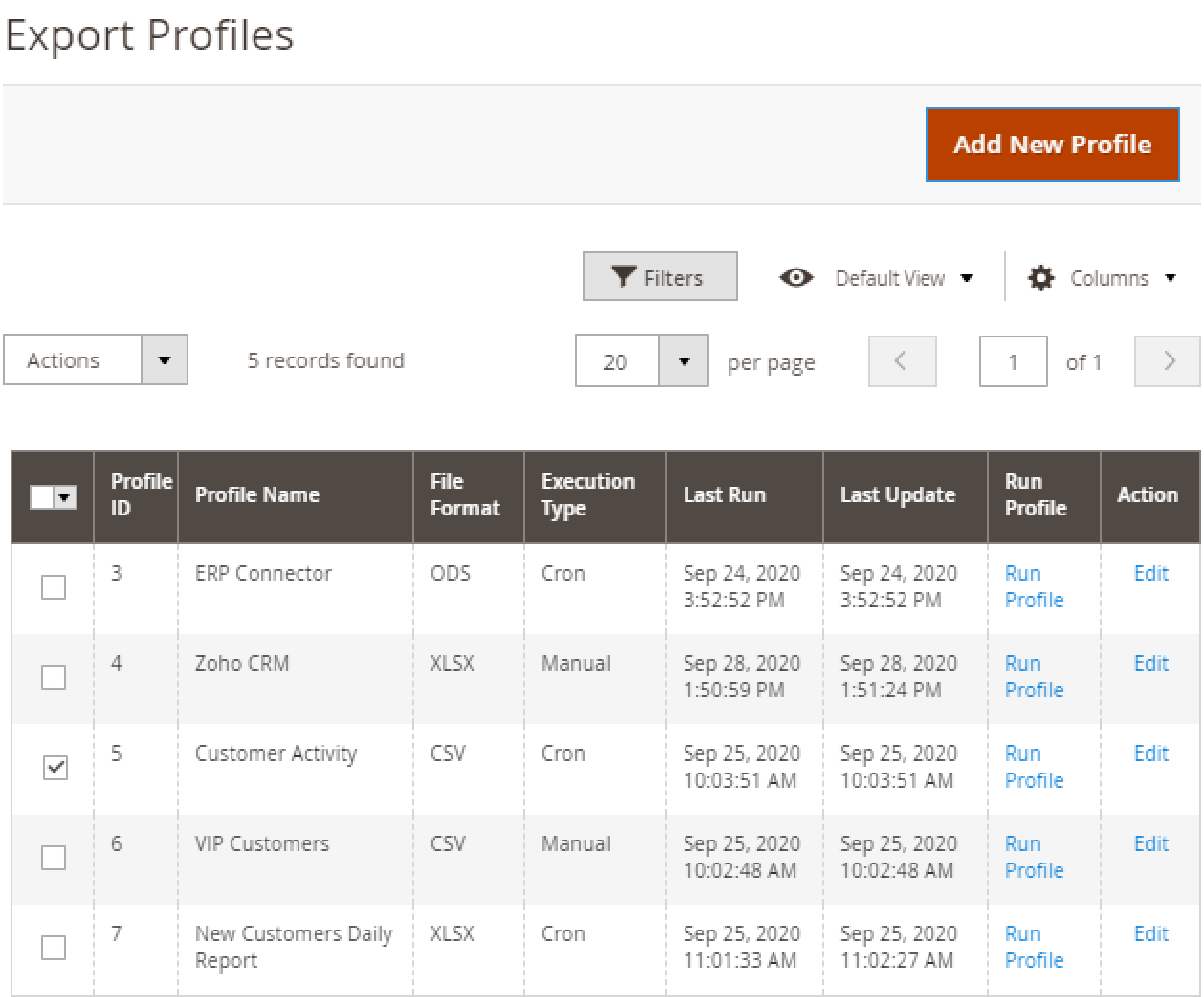
Enable Multi-Process Export - choose *Yes* to speed up the export. Remember, that this option is added specifically for customers. The multi-process for Amasty Export and Amasty Export Pro should be enabled in the other tab.

The 'Multi-Process Export' feature requires the **PHP extension 'pcntl'** to be installed on the server. If you enable the feature and no performance boost happens, please ask your hoster/system administrator to check if the 'pcntl' extension is installed.

Number of Parallel Processes - specify the number of processes according to your server capabilities. The more parallel processes are set, the faster the export process goes, but the higher the server loads.

Export Customer Profiles

The extension enables you to create flexible profiles for the customers export and execute it on regular basis. To view all the profiles, please go to **System → Export Customers → Profiles**.



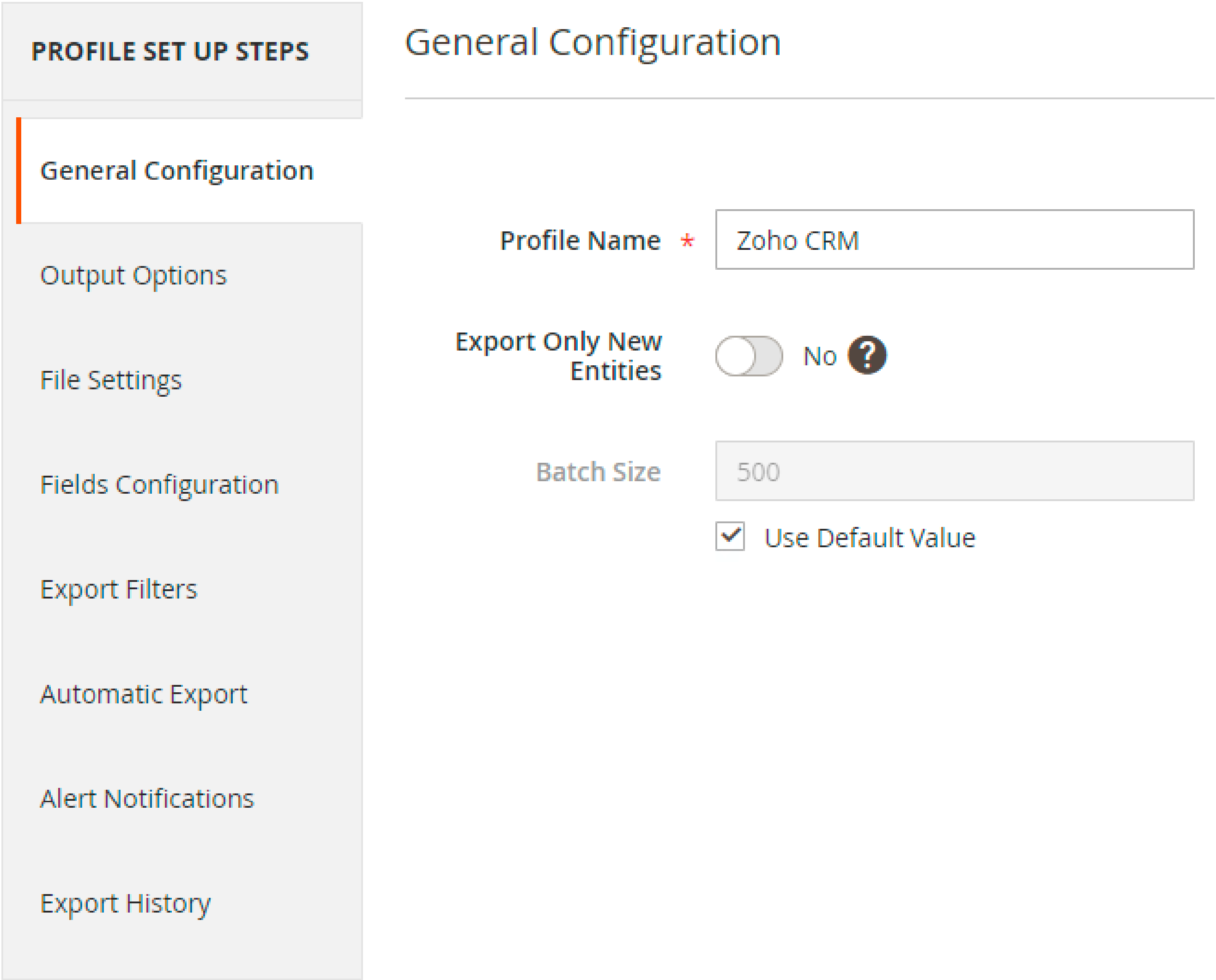
	Profile ID	Profile Name	File Format	Execution Type	Last Run	Last Update	Run Profile	Action
	3	ERP Connector	ODS	Cron	Sep 24, 2020 3:52:52 PM	Sep 24, 2020 3:52:52 PM	Run Profile	Edit
	4	Zoho CRM	XLSX	Manual	Sep 28, 2020 1:50:59 PM	Sep 28, 2020 1:51:24 PM	Run Profile	Edit
✓	5	Customer Activity	CSV	Cron	Sep 25, 2020 10:03:51 AM	Sep 25, 2020 10:03:51 AM	Run Profile	Edit
	6	VIP Customers	CSV	Manual	Sep 25, 2020 10:02:48 AM	Sep 25, 2020 10:02:48 AM	Run Profile	Edit
	7	New Customers Daily Report	XLSX	Cron	Sep 25, 2020 11:01:33 AM	Sep 25, 2020 11:02:27 AM	Run Profile	Edit

You can view, delete, add new profiles or run any of them manually right from the grid.

To create a new profile, hit the **Add New Profile** button and follow a profile set up steps.

General Configuration

In the first tab, you can adjust the general settings of the profile.



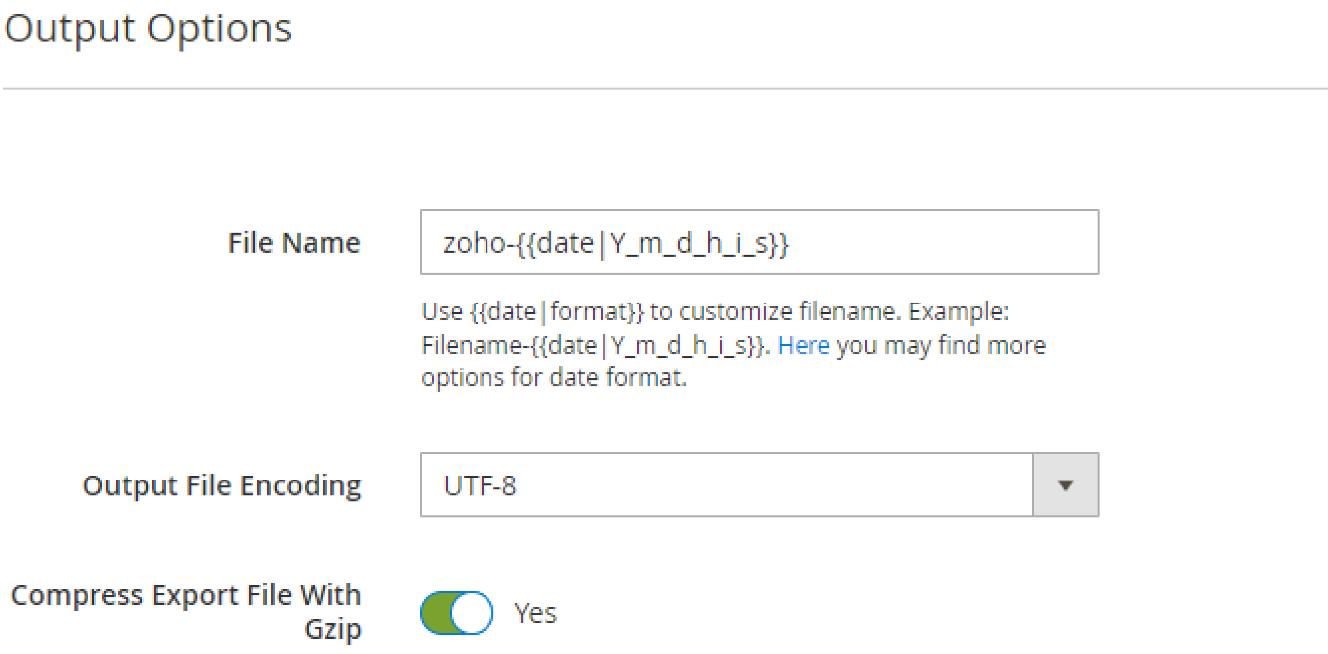
Profile Name - add the profile name for internal usage. This name will be displayed in the grid.

Export Only New Entities - enable this setting to skip the previously exported customers. The option is useful in case you export the profile regularly and need to get the information only related to recently registered customers.

Batch Size - set the number of customers that will be processed in one iteration. You may configure batch size for each profile separately or specify the value in general configuration settings and use this default value.

Output Options

On this tab, you can configure the export output options.



File Name - specify the title for the export file.

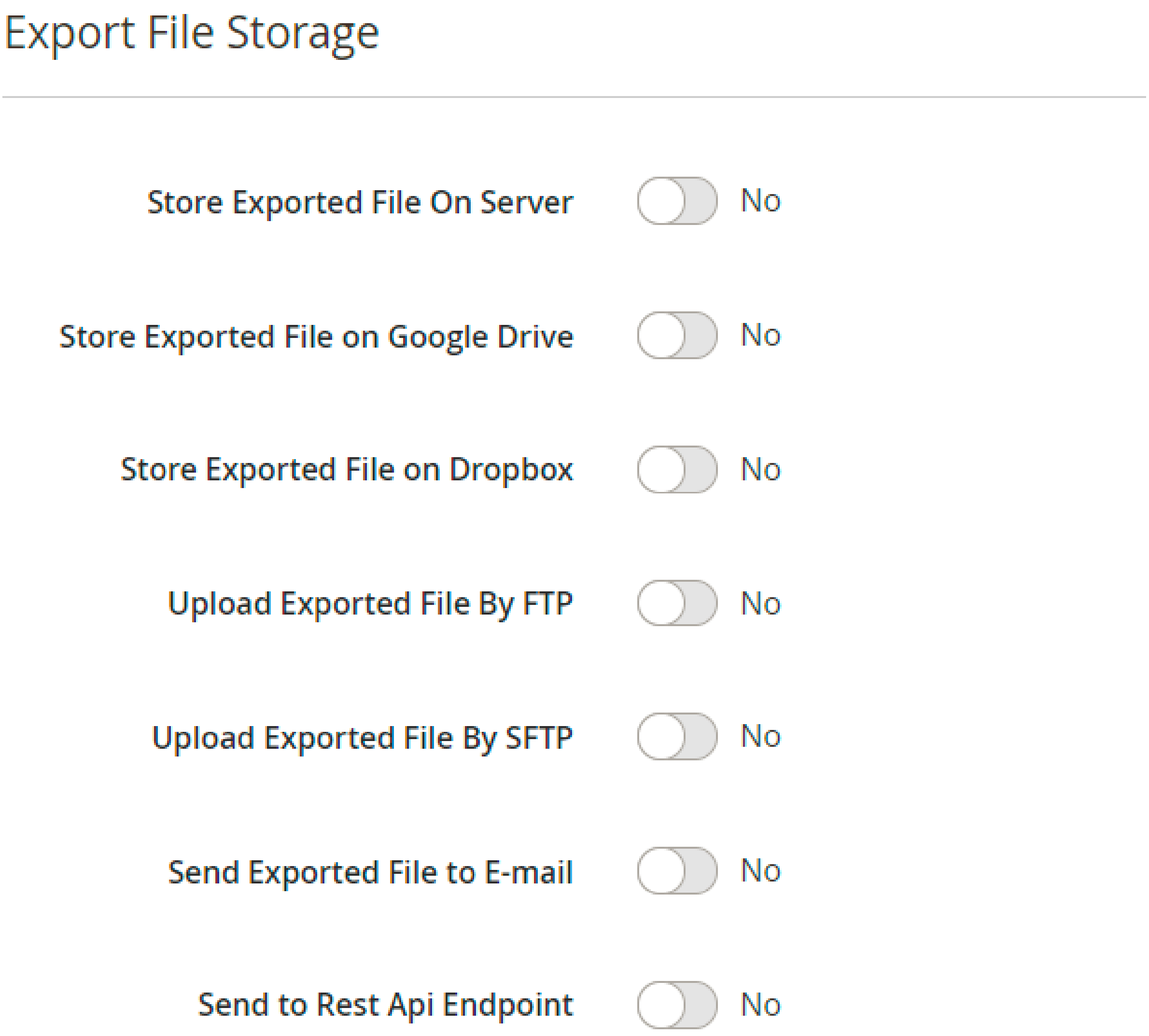
Use {date|format} to customize filename. Example: Filename-{date|Y_m_d_h_i_s}. Here you may see more options for date format.

Output File Encoding - choose the suitable type of export file encoding from the dropdown. UTF-8 is used by default.

Compress Export File With Gzip - enable the toggle to compress the file and save extra space on a server.

Export File Storage

Specify where to export the profile. You may choose the internal or external server, Google Drive, Dropbox or send the exported file by email.



If **Store Exported File On Server** is enabled, provide *File Path* and *File Name on Server*. The file will be saved in Magento 'var' directory relative to the specified path.

If you want to **Upload Exported File By FTP / SFTP**, you will need to fill the following fields:

- Host
- User
- Password
- File Path
- File Name for FTP/SFTP.

For **FTP** you can also enable a *Passive Mode*.

In case you want to **Send Exported File to E-mail**, provide:

- Email Sender
- E-mail Recipients
- E-mail Message Subject
- Email Template.

If you are using **Send to Rest Api Endpoint**, provide:

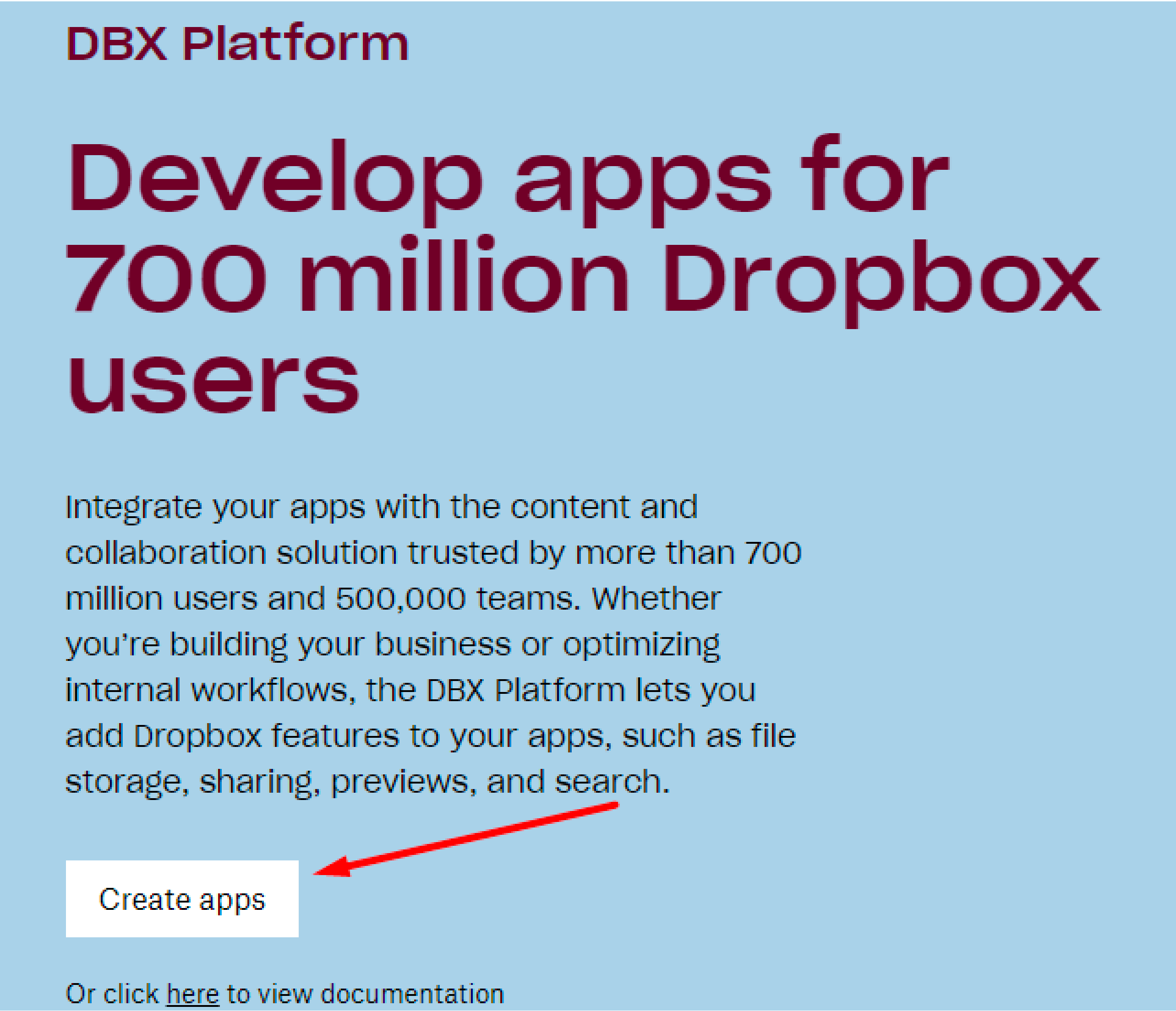
- Rest Api Endpoint
- Auth (No Auth / Bearer / Basic)
- Method (POST / PUT)
- Content Type (JSON / XML).

Dropbox Configuration

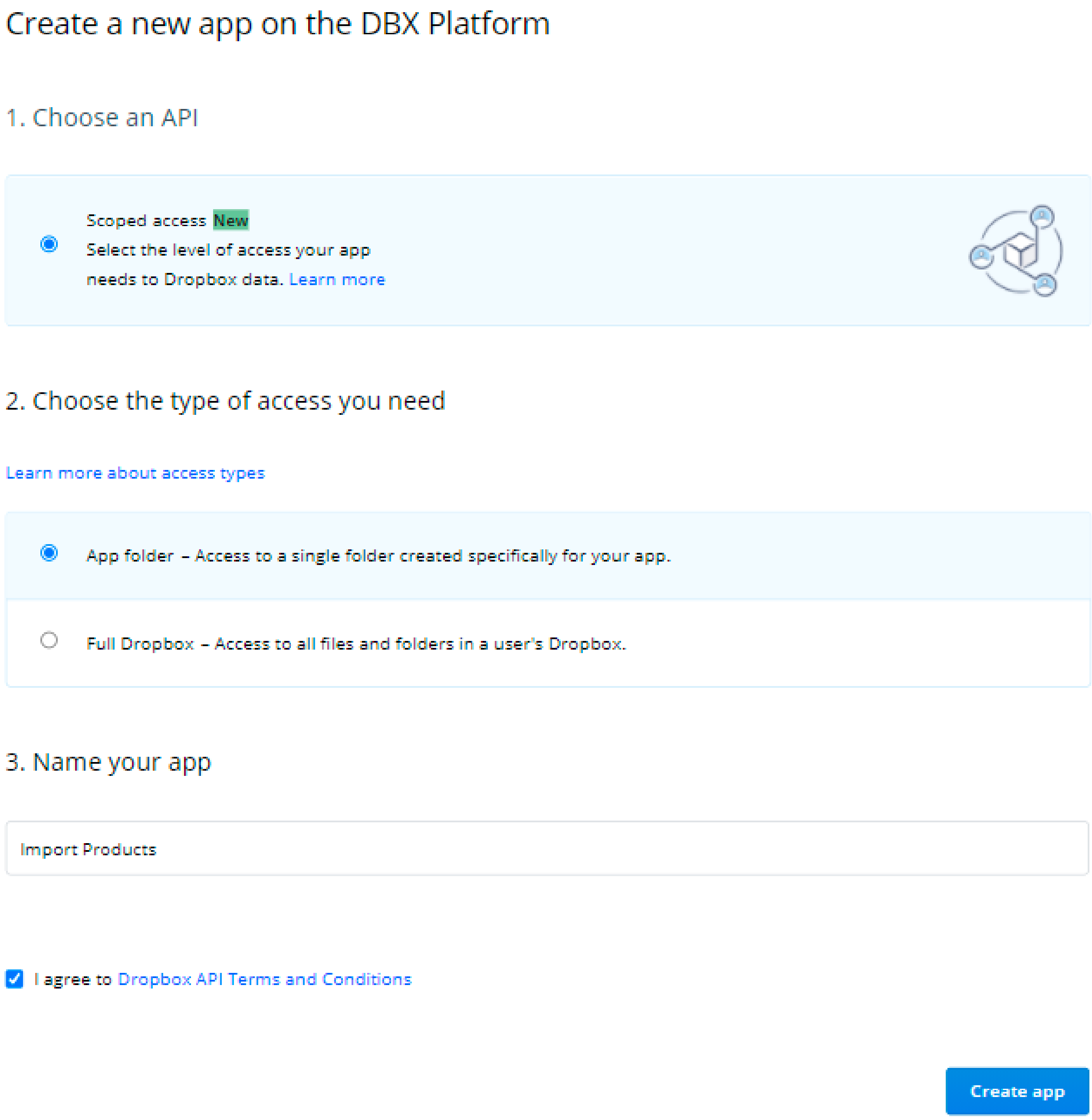
To export to Dropbox, you will need to provide the access token. Follow the steps below to get the token.

1. Go to https://www.dropbox.com/developers and sign in.

2. Hit the **Create Apps** button.

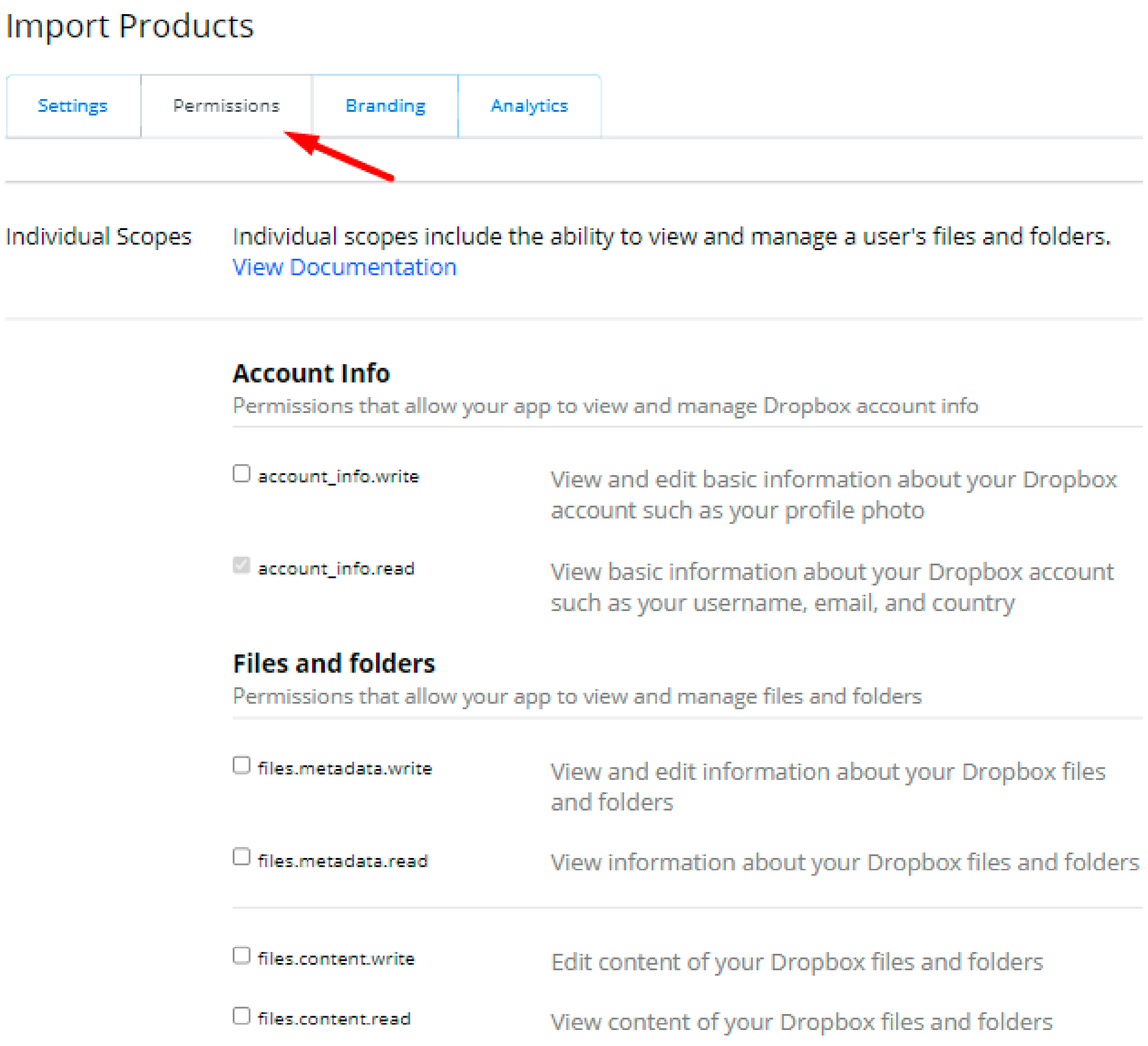


3. Choose an API, a type of access you need and specify the title for your folder.

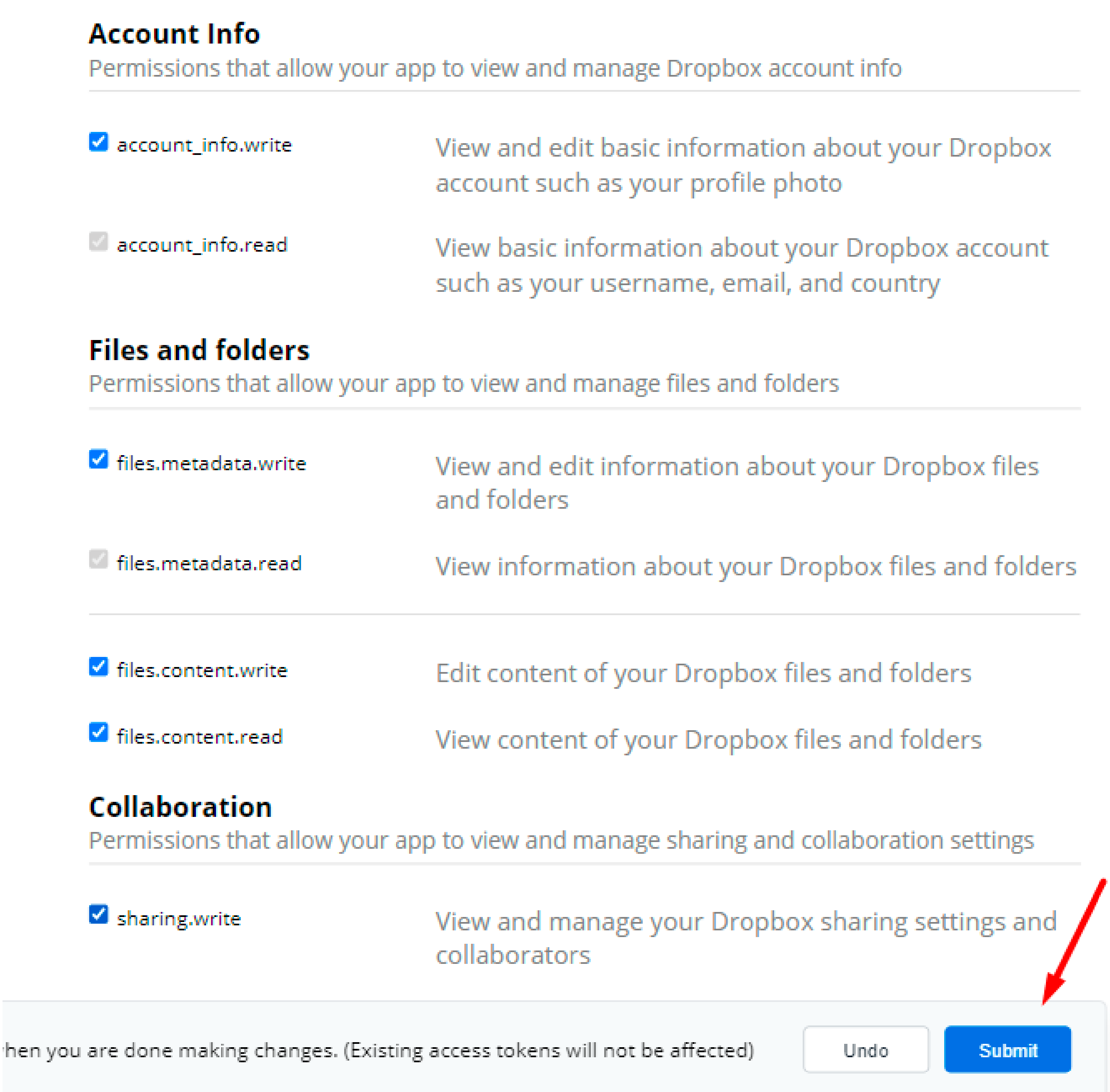


Agree with the terms & conditions and click **Create App**. You will be automatically redirected to the folder configuration.

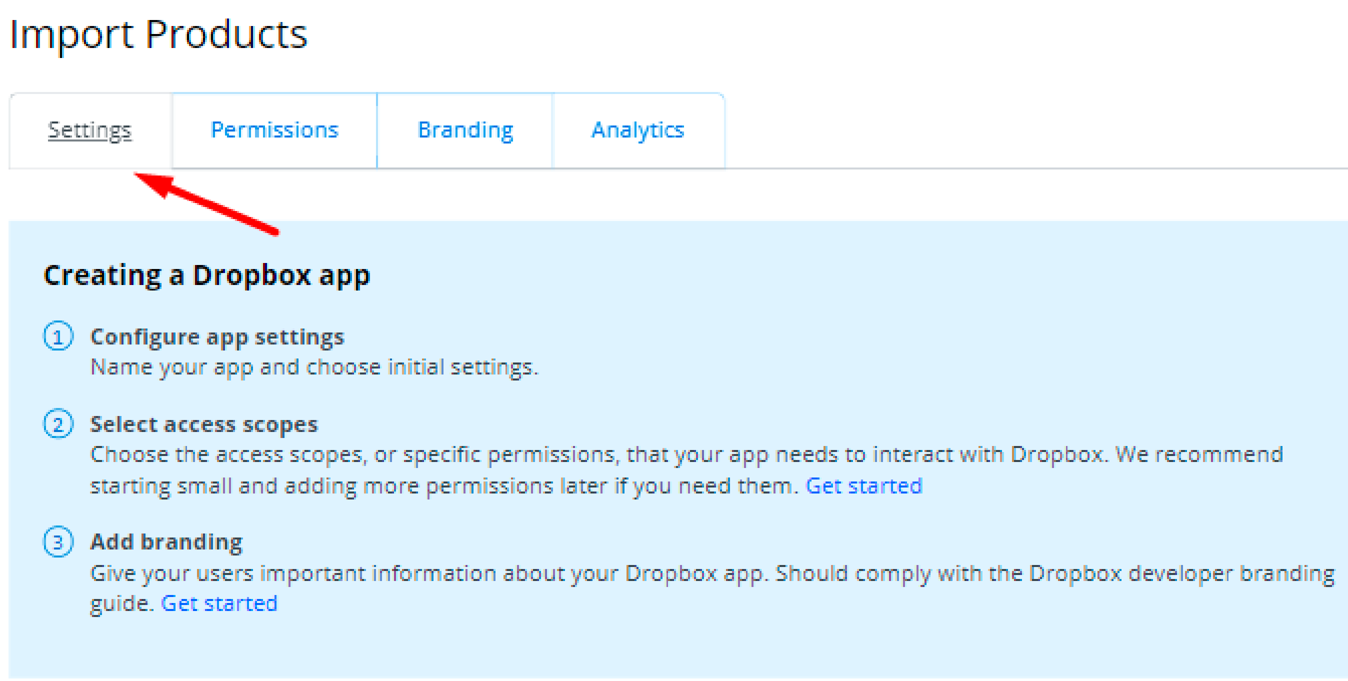
4. Proceed to the **Permissions** tab.



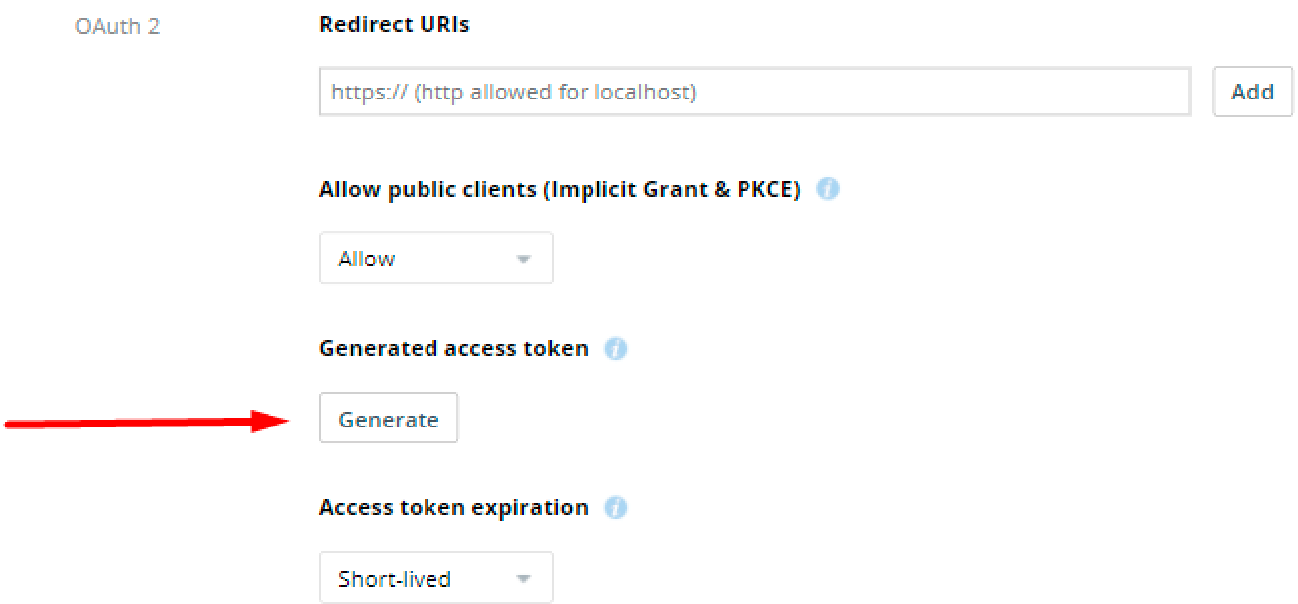
Grant the permissions to write the files and click **Submit**.



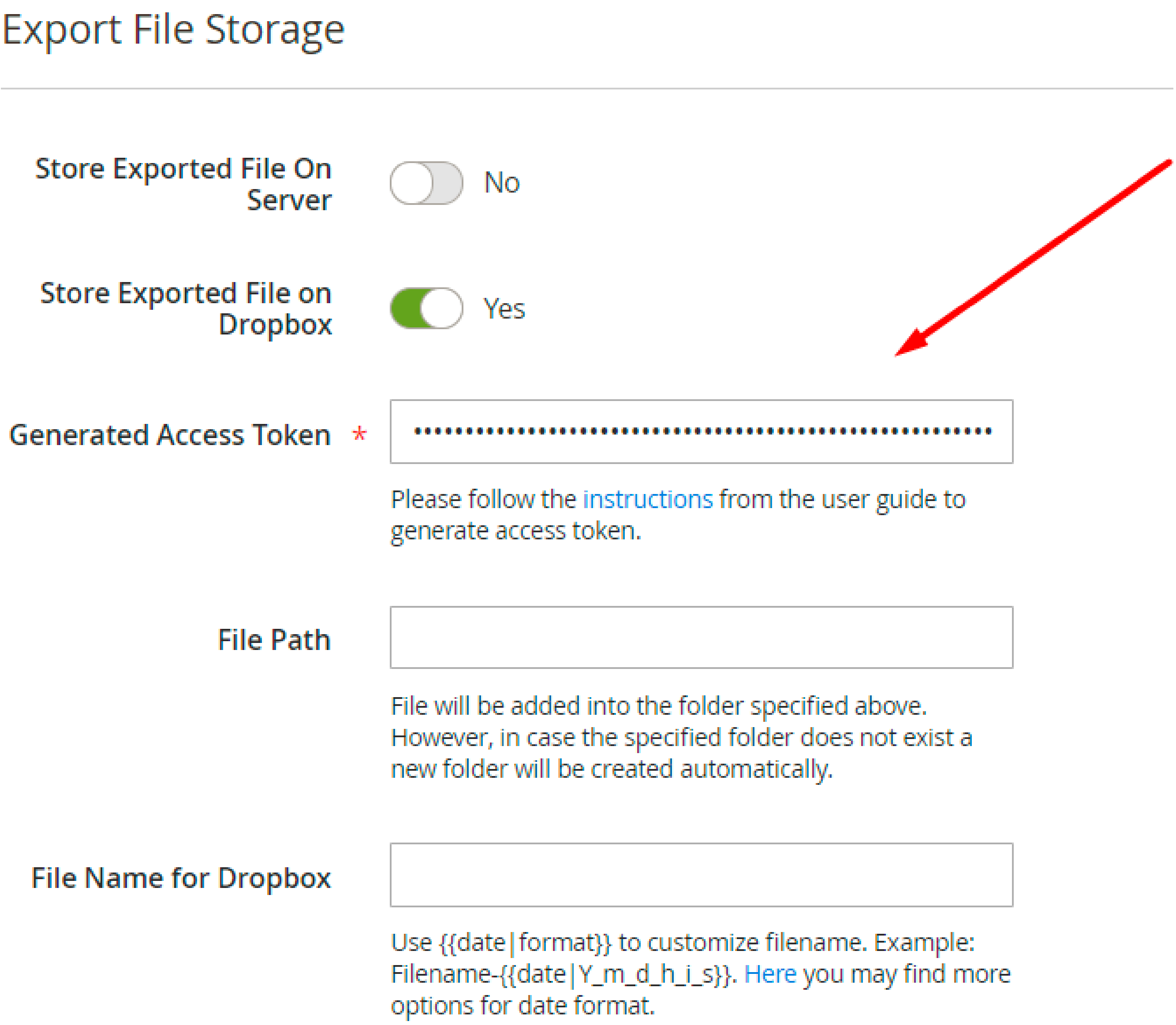
5. Return to the **Settings** tab.



6. Find the OAuth 2 section and hit the **Generate** button below the *Generated access token* field.



7. Copy the token and paste it into the **Generated Access Token** field.

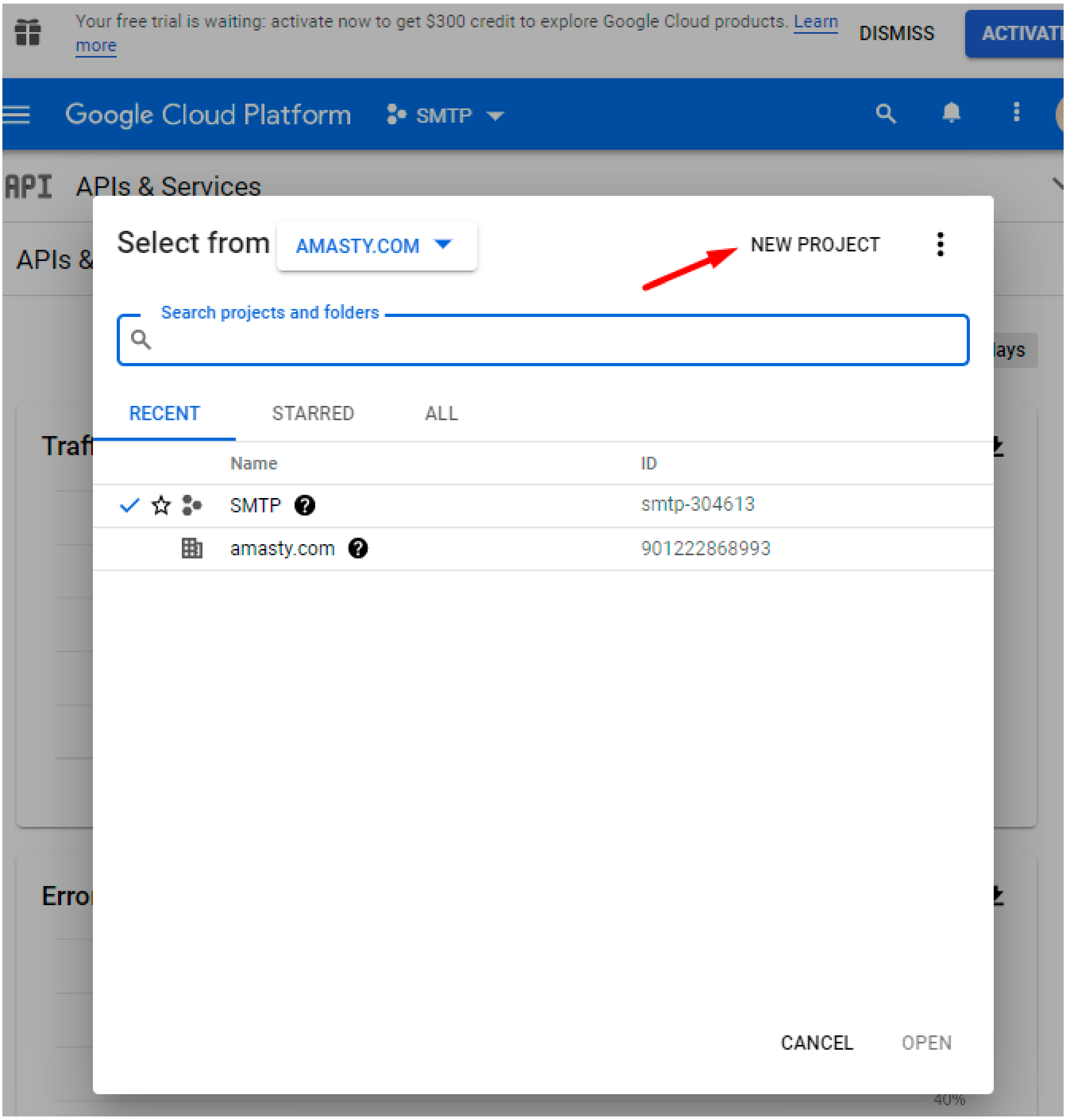


Google Drive Configuration

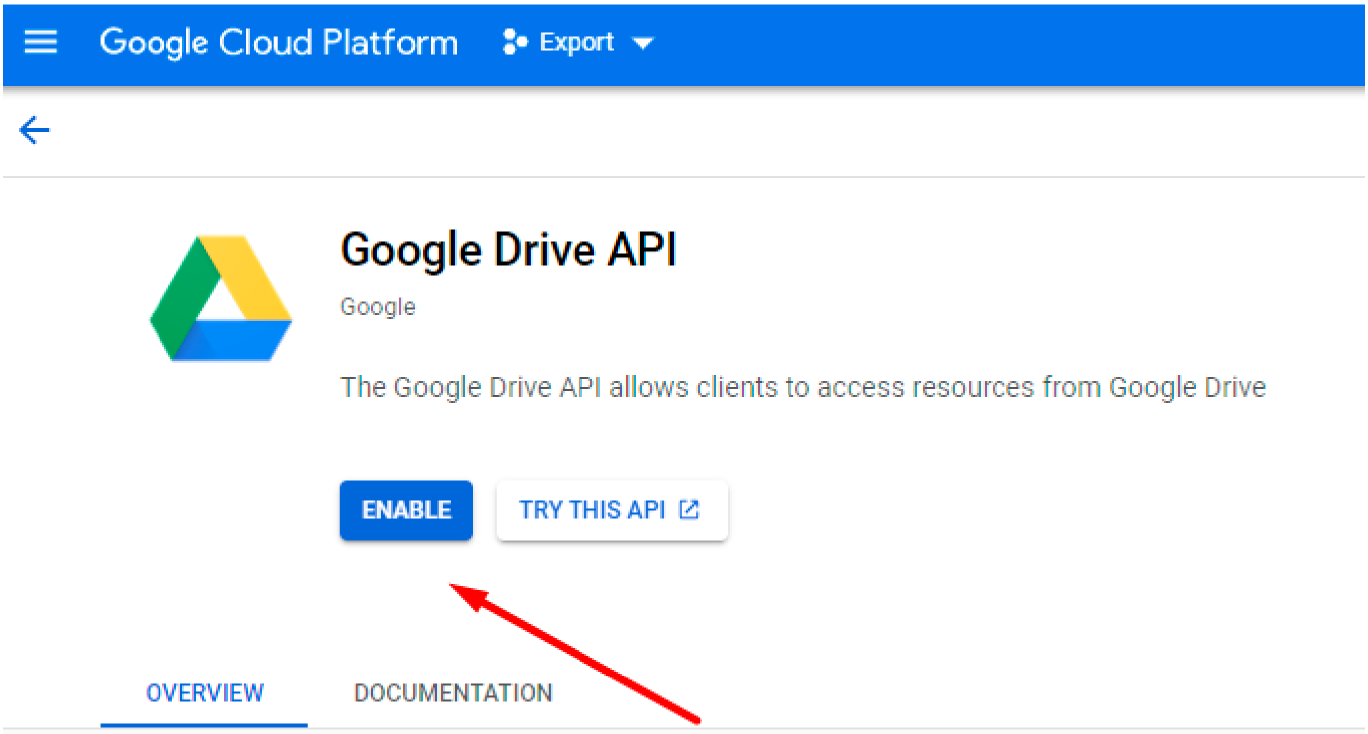
To set the integration with Google Drive, you need a specific API key. To get the key and configure this output option correctly, follow the steps below.

1. First of all, you need to install **Google APIs Client Library** on your Magento instance. Click here and install **`composer require google/apiclient:“^2.0”`**.

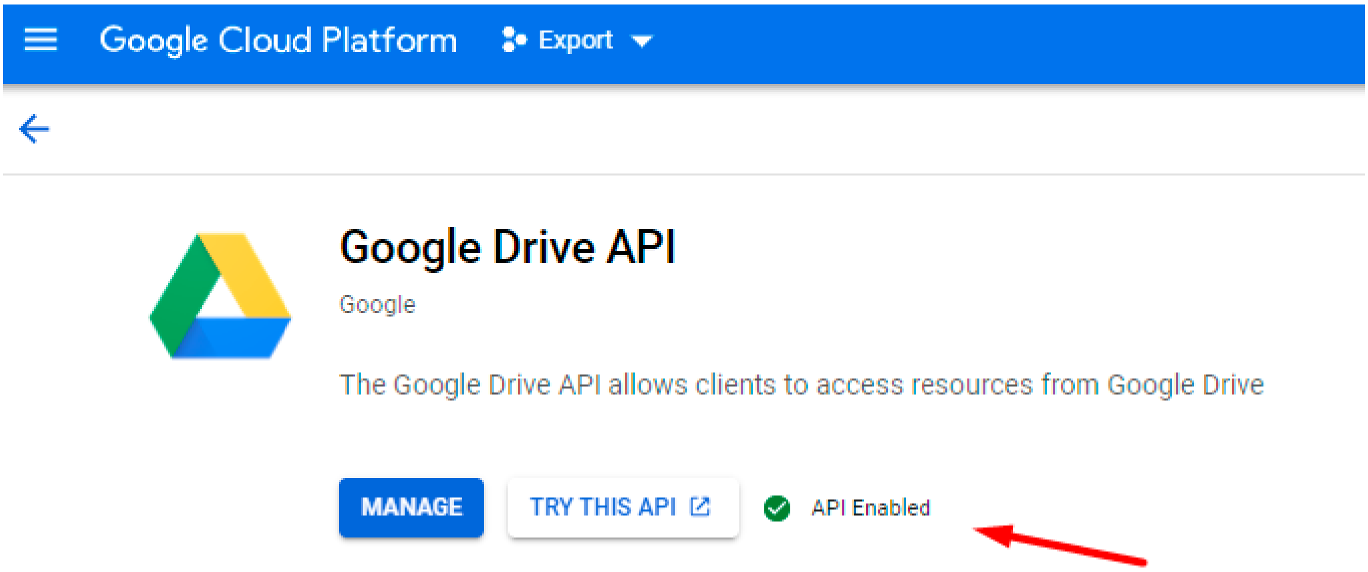
2. Go here and choose a project or create a new one if necessary.



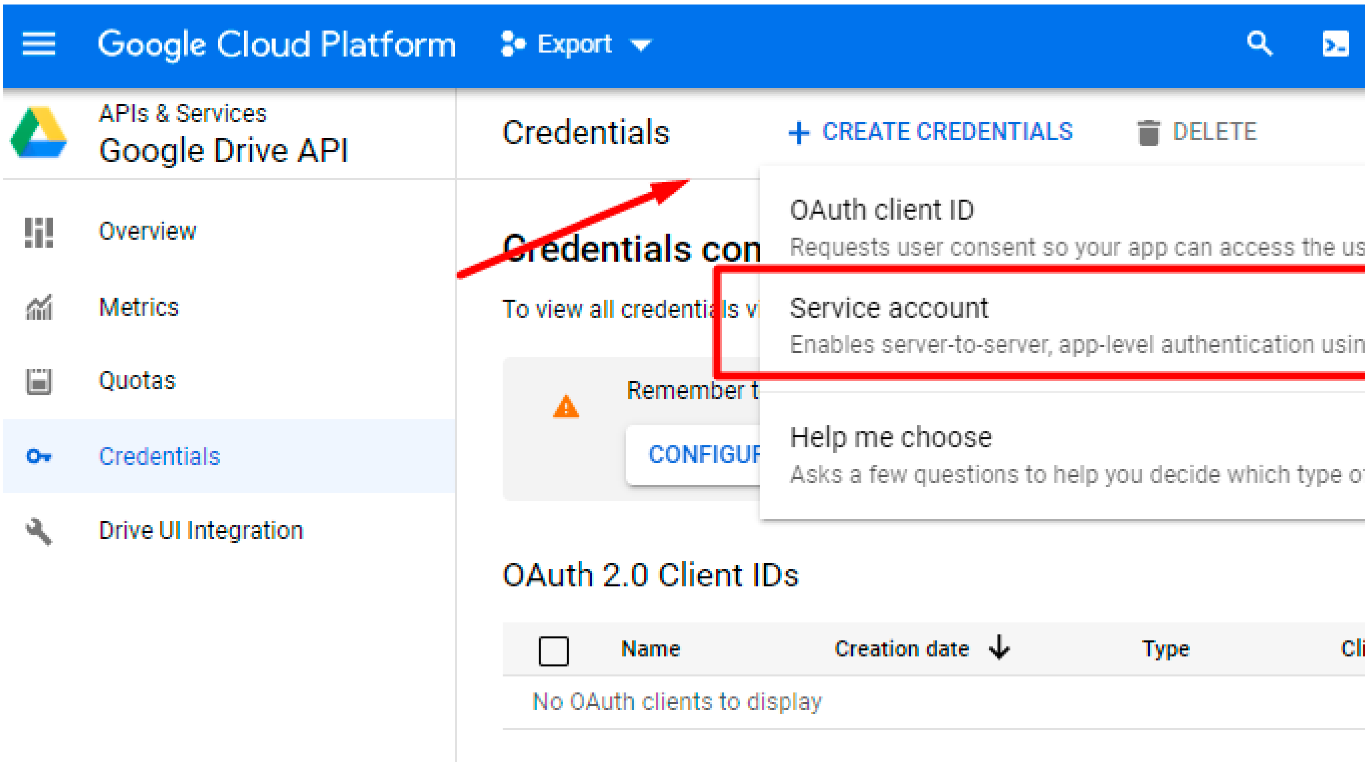
3. When the required project is chosen, return to this page and enable Google Drive API.



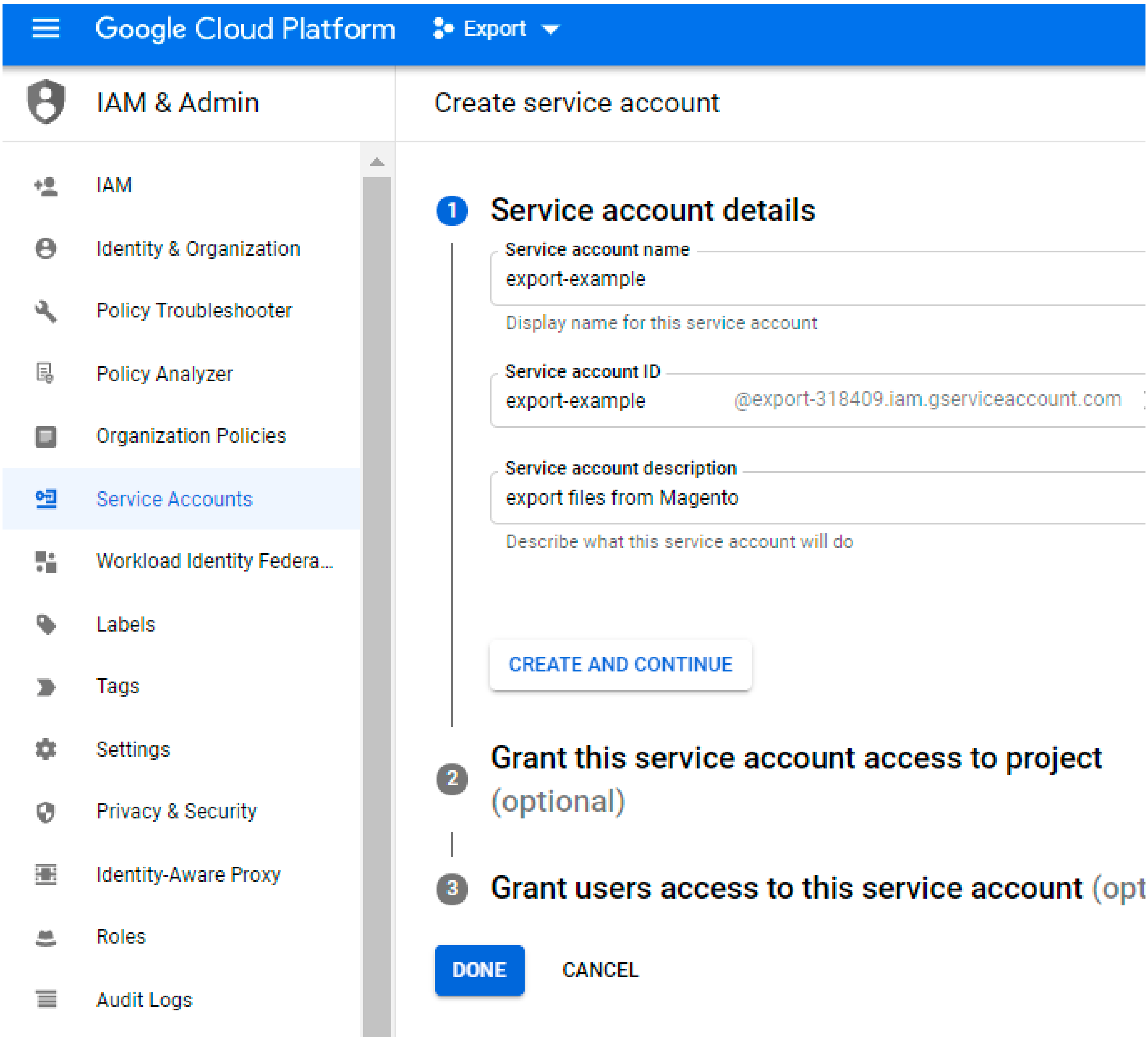
4. If everything is correct, you will see the following status:



5. Click **Manage** and proceed to **APIs & Services → Credentials**. There click **Create Credentials →Service account**.

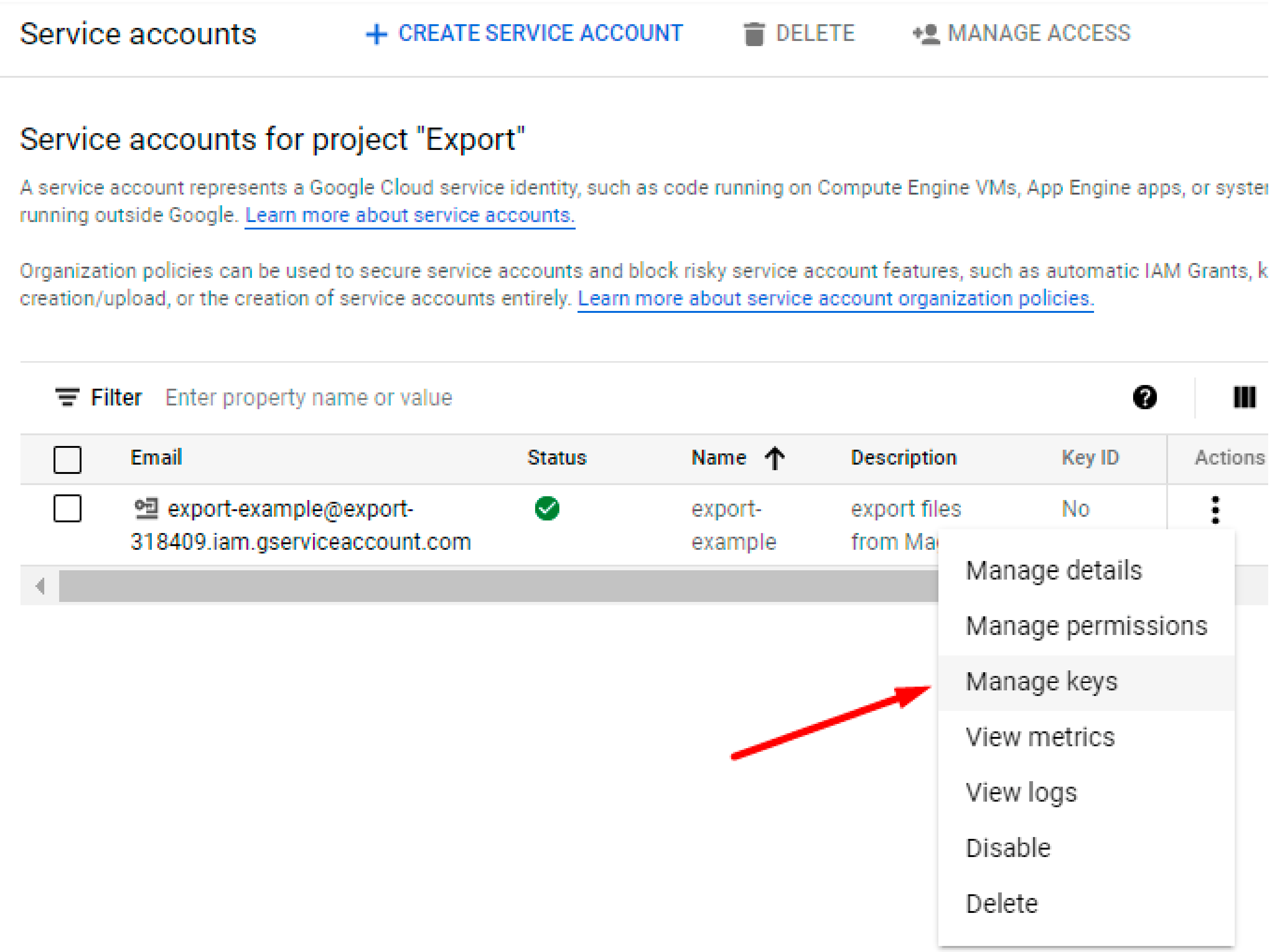


6. Provide **Service account details**. You can skip Step 2 and Step 3.

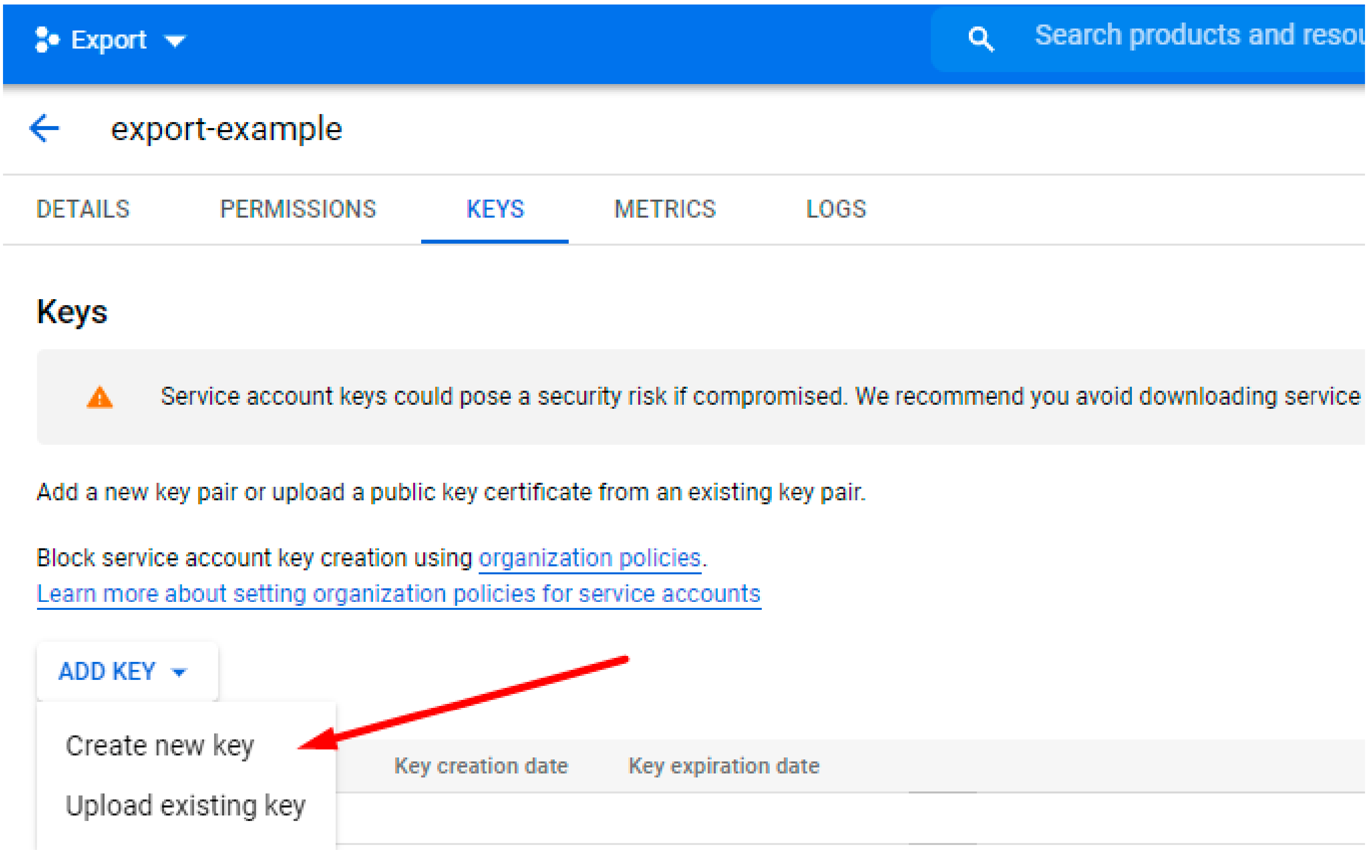


Click **Done**.

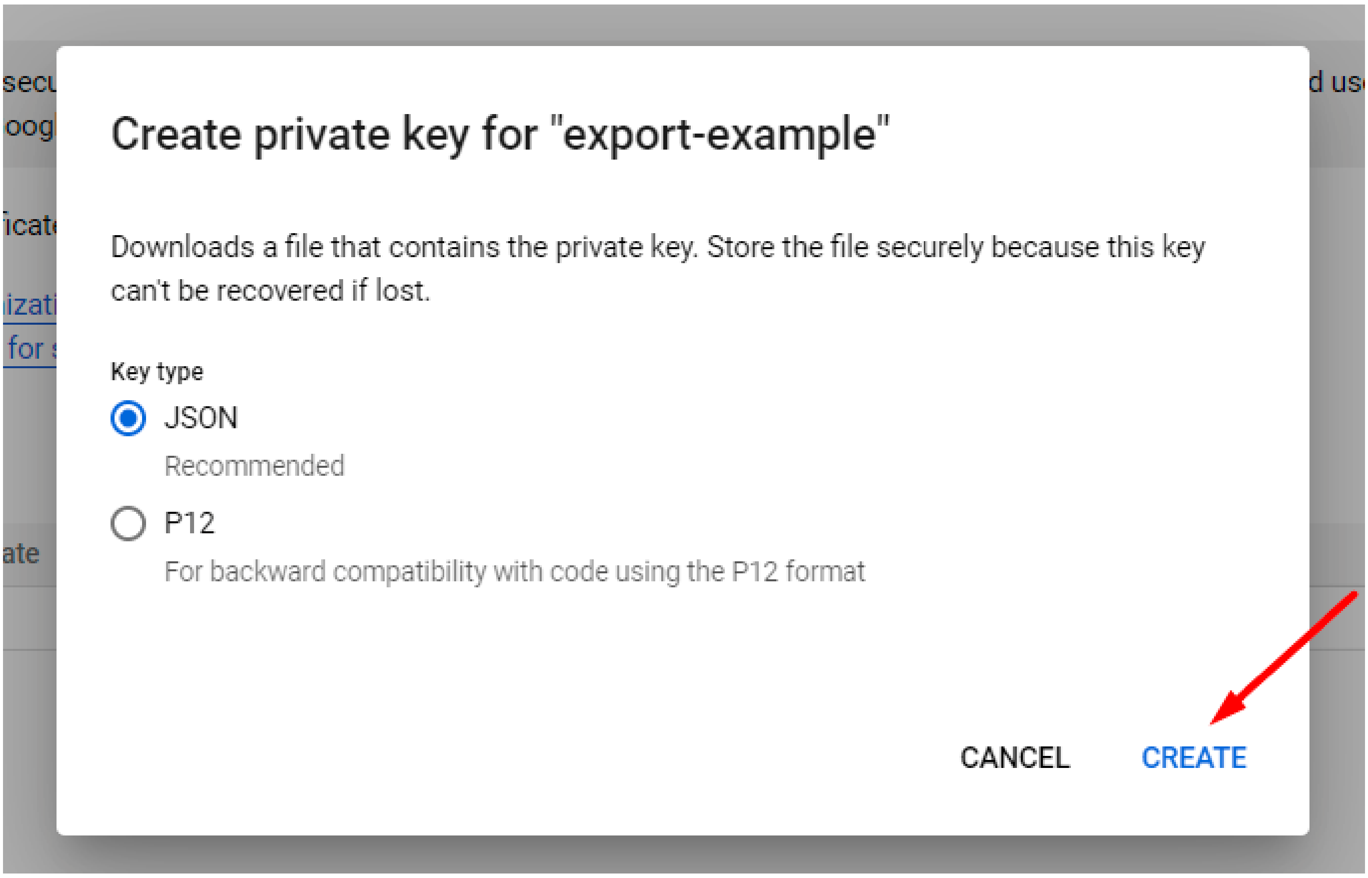
7. Navigate to the **Service accounts** tab and find the required service. Expand the *Actions* dropdown and hit the **Manage keys** option.



8. Expand the **Add Key** dropdown and select **Create new key**.

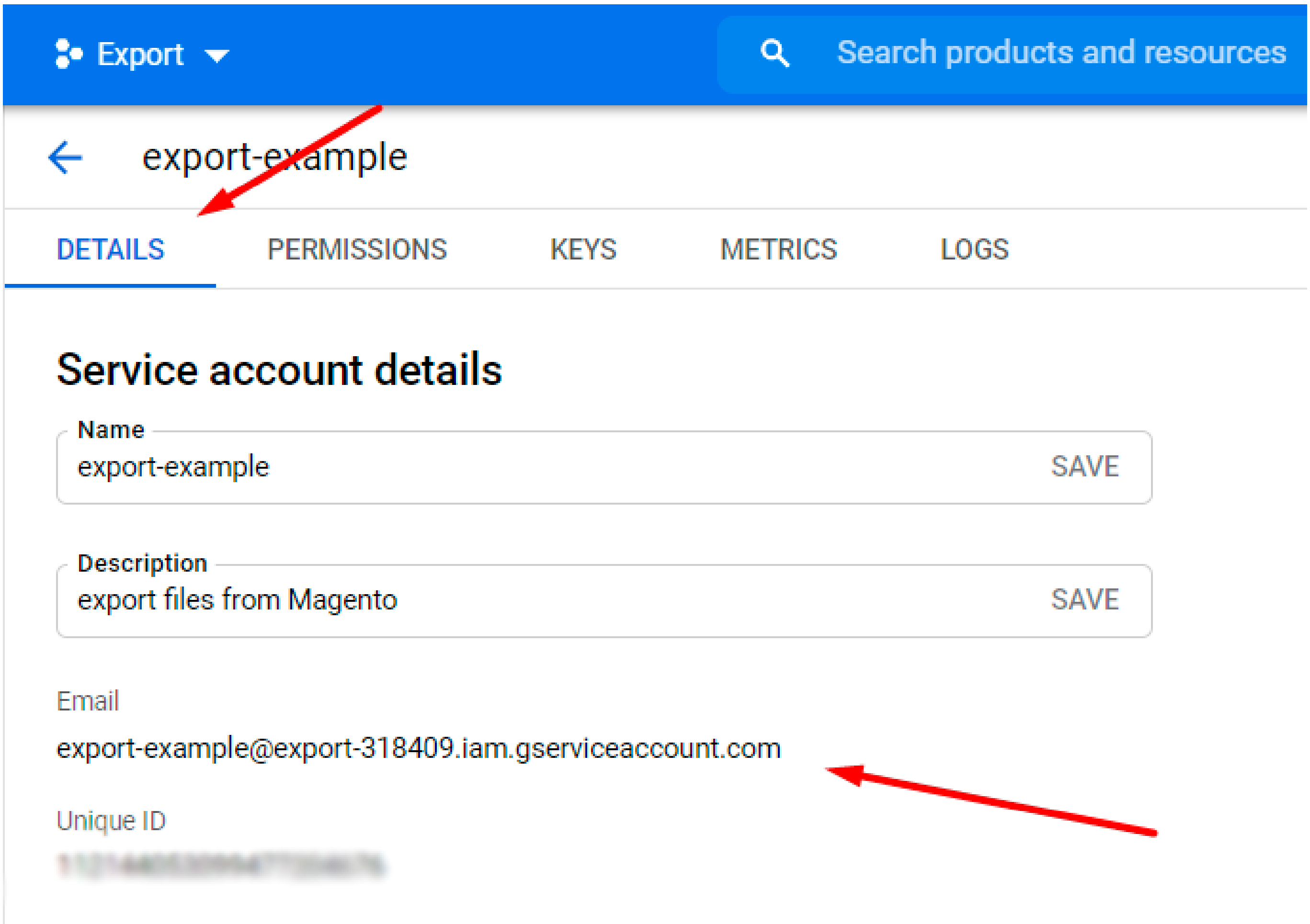


9. Choose **JSON** file format and hit the **Create** button.

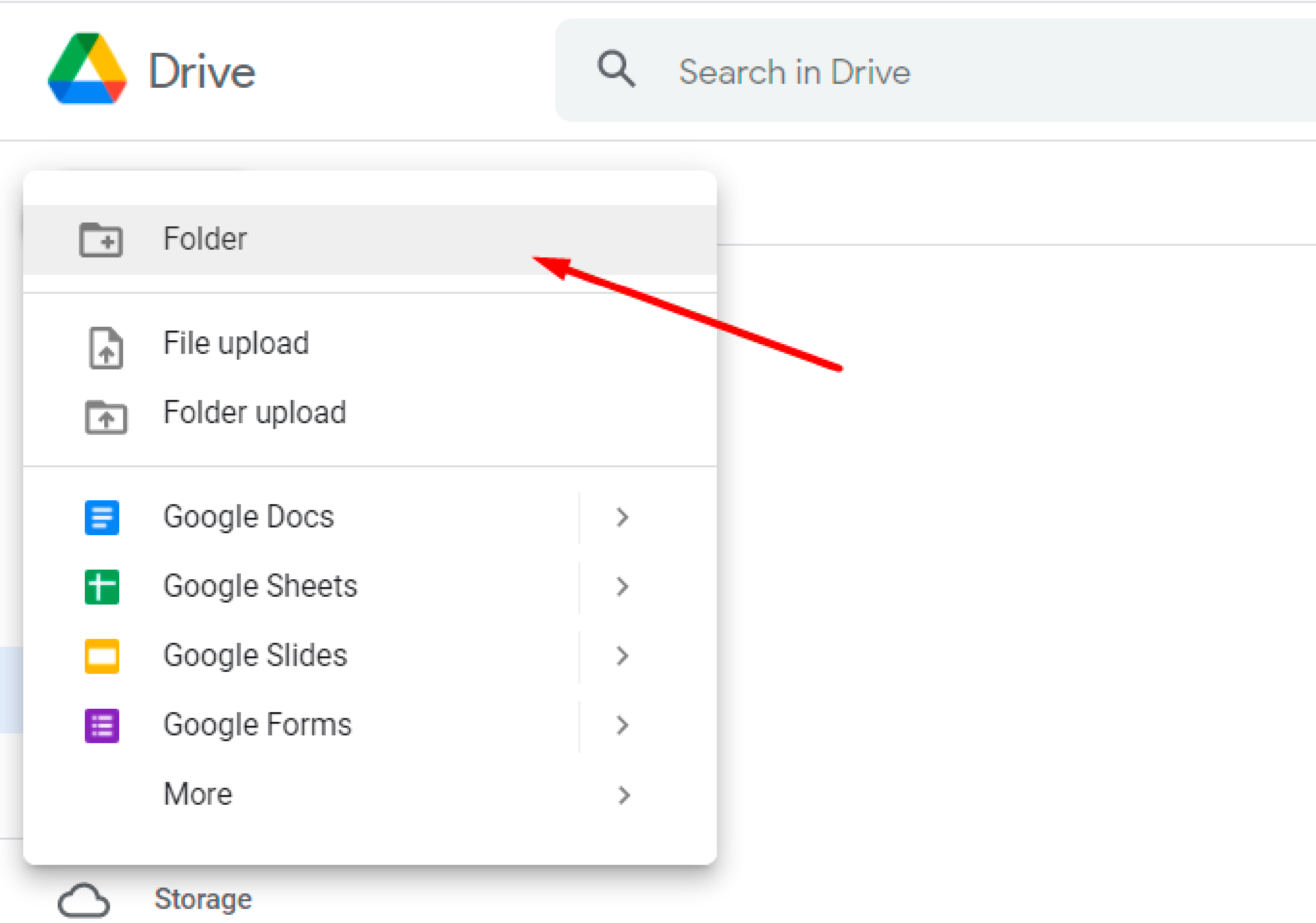


The file will be automatically generated and downloaded.

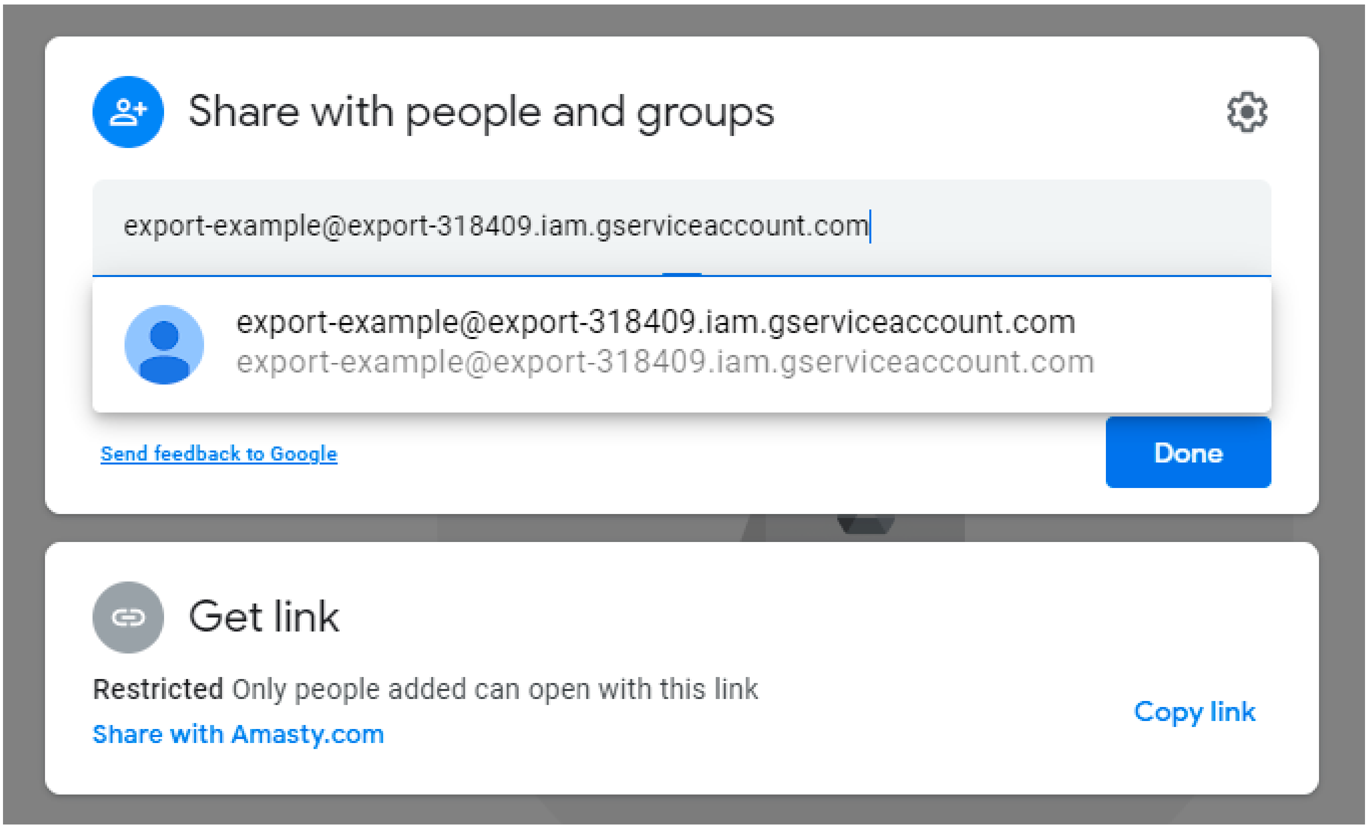
10. Proceed to the **Details** tab and copy the email.



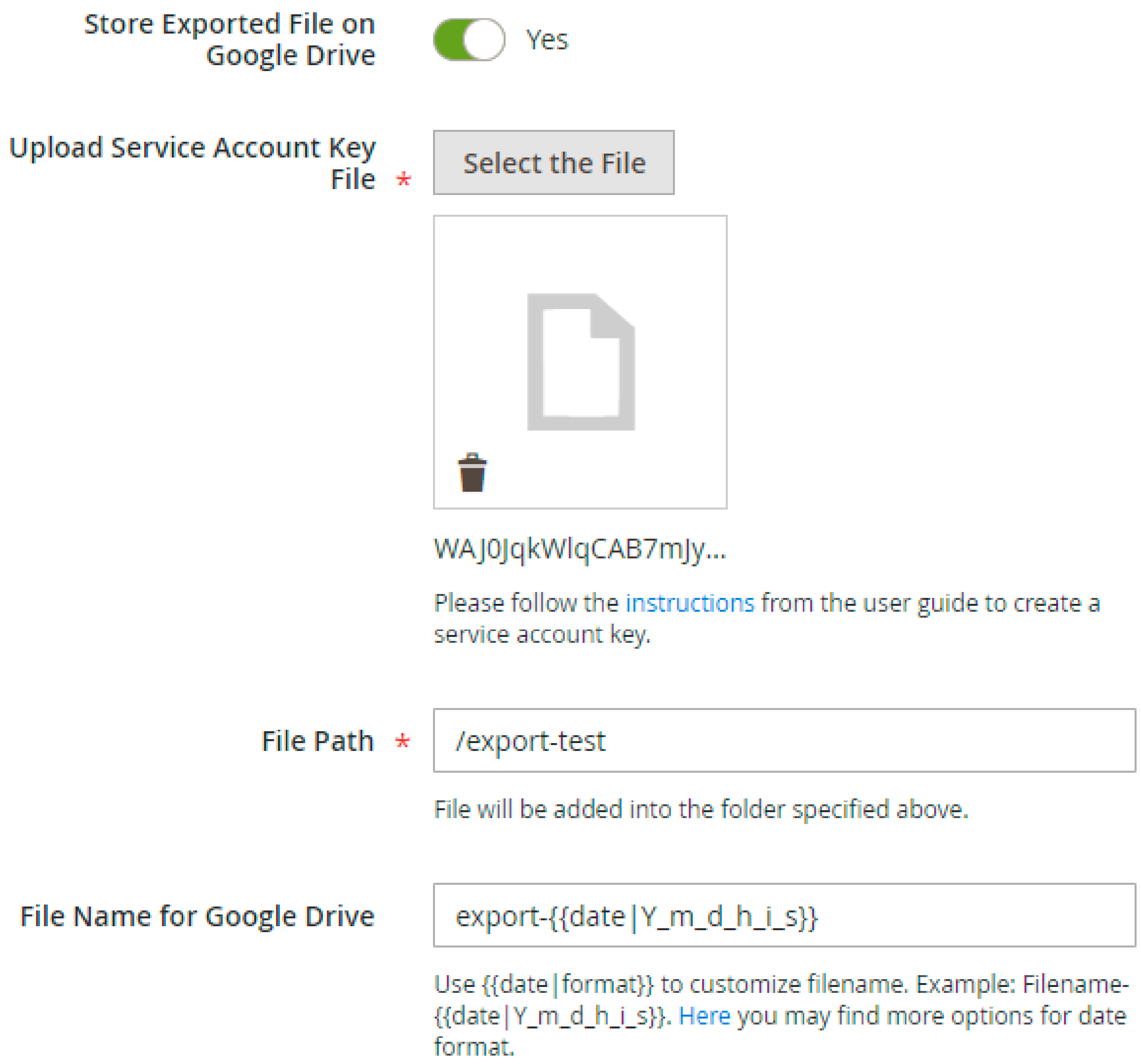
11. Go to My Drive. Create a folder to which export files will be output from Magento. Specify the title.



12. Now click **Share** and insert the email that you've copied. Click **Done**.



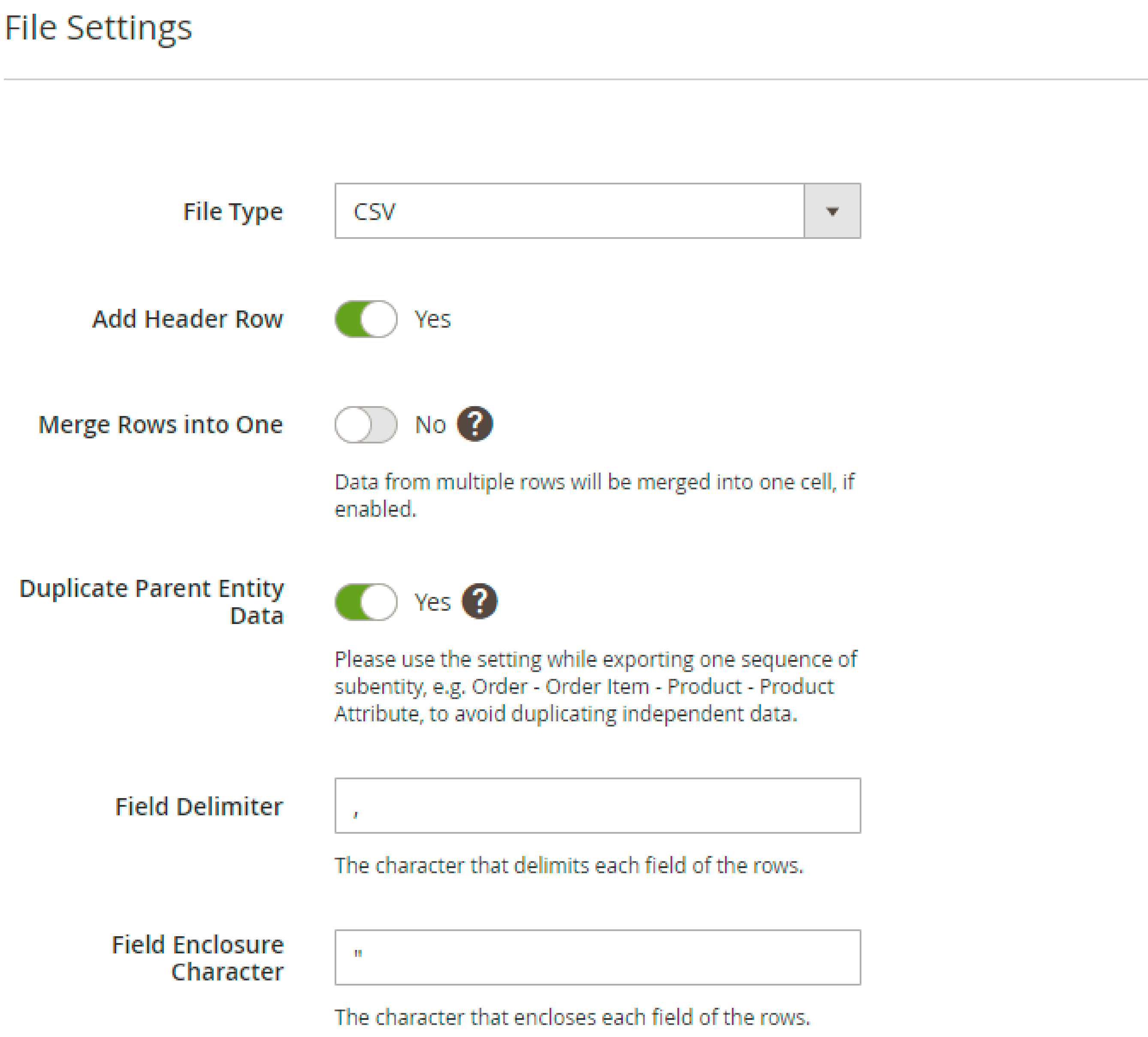
13. Return to the admin panel. Upload a JSON file, provide the path to the created folder and specify an export file naming with or without data format.



The configuration is ready. Run export profile and check the file in the Drive folder.

File Settings

In this section, you can choose the needed file type and configure its settings.



The following formats are available:

- CSV
- XML
- ODS
- XLSX
- JSON
- Template

For **CSV, ODS** and **XLSX** formats you can:

Add Header Row - column titles will be displayed in this row.

Merge Rows into One - if this setting is enabled, the information from multiple rows will be merged into one cell. The character that delimits each field of the child rows is customizable. Check the GIF in a demo to see how it works.

Duplicate Parent Entity Data - if enabled, the values of the child entities will be duplicated from the parent one.

See how it works

If disabled, child values are empty:

entity_id	state	status	customer_id	sales_order_item.product_id	sales_order_item.product_type
3	complete	processing	1	2040	simple
				2041	simple

If enabled, the values are duplicated:

entity_id	state	status	customer_id	sales_order_item.product_id	sales_order_item.product_type
3	complete	processing	1	2040	simple
3	complete	processing	1	2041	simple

Please, use the setting while exporting one sequence of subentity, e.g. *Order - Order Item - Product - Product Attribute*, to avoid duplicating independent data.

For a **CSV** file you can additionally set:

- Field Delimiter
- Field Enclosure Character

For an **XML** file you can customize:

- XML Item Tag
- Header
- Footer

XSLT Editor

The extension includes an XSLT editor so that you could output XML files with any custom formatting. Using this functionality, you can create custom templates for XML documents and add, remove, rearrange or sort elements in the file.

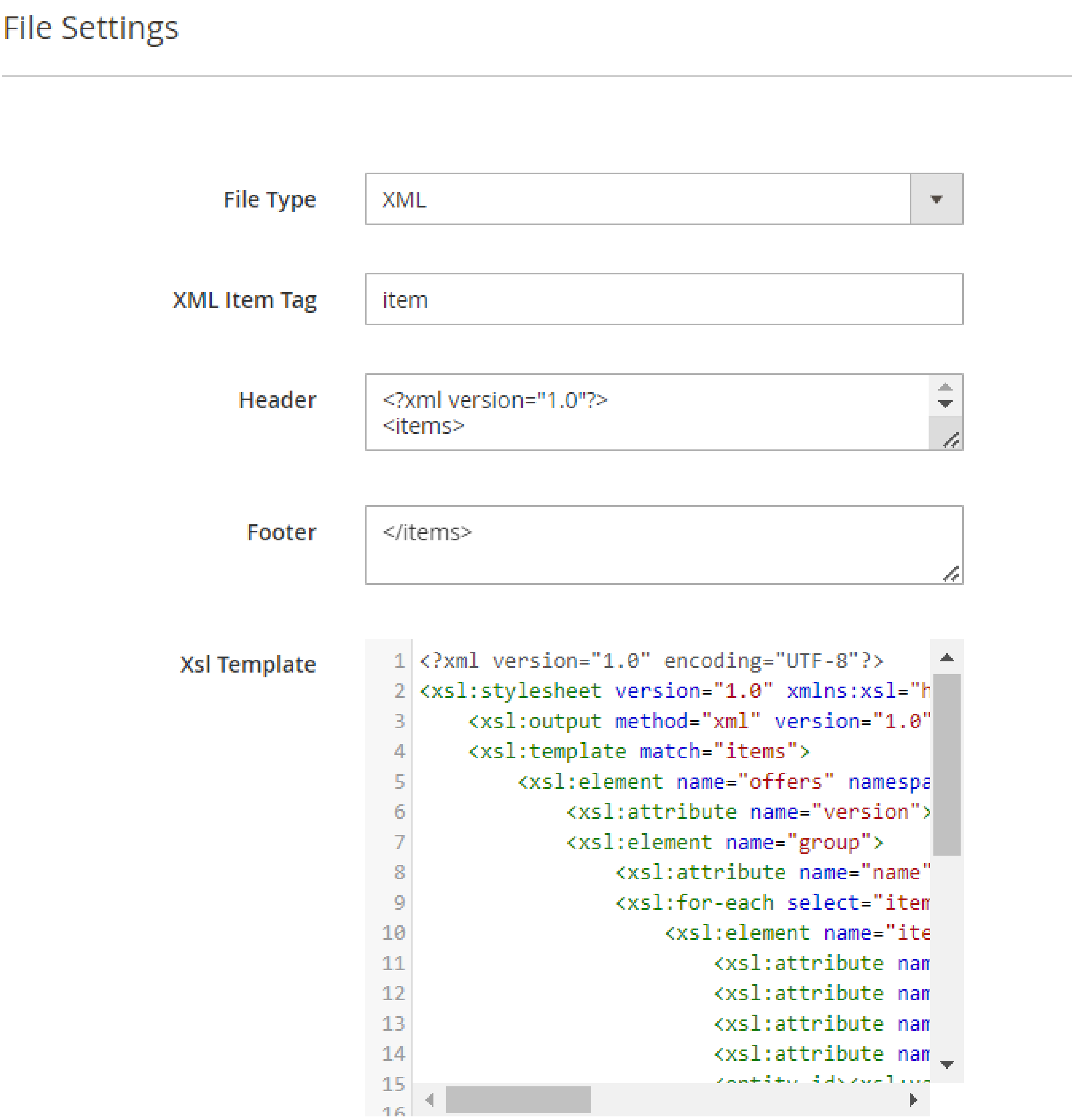
What is XSLT?

A lot of 3rd-party platforms you are integrating with use custom XML table formatting. Magento itself can't adapt such files automatically since each platform has its own requirements. XSLT (Extensible Stylesheet Language Transformations) helps to interpret the values from the Magento database and put them in an XML document. The editor helps to organize data in the file and make it acceptable for the platform you are exporting to.

Find out how the XSLT works in this tutorial.

Before exporting a custom XML file, review the formatting requirements and find out how the attributes provided in the document are named and structured in Magento. Then, create an **Xsl Template** to match the values.

To simplify template creation, download this ready-made sample file: xsl-template-for-export.zip

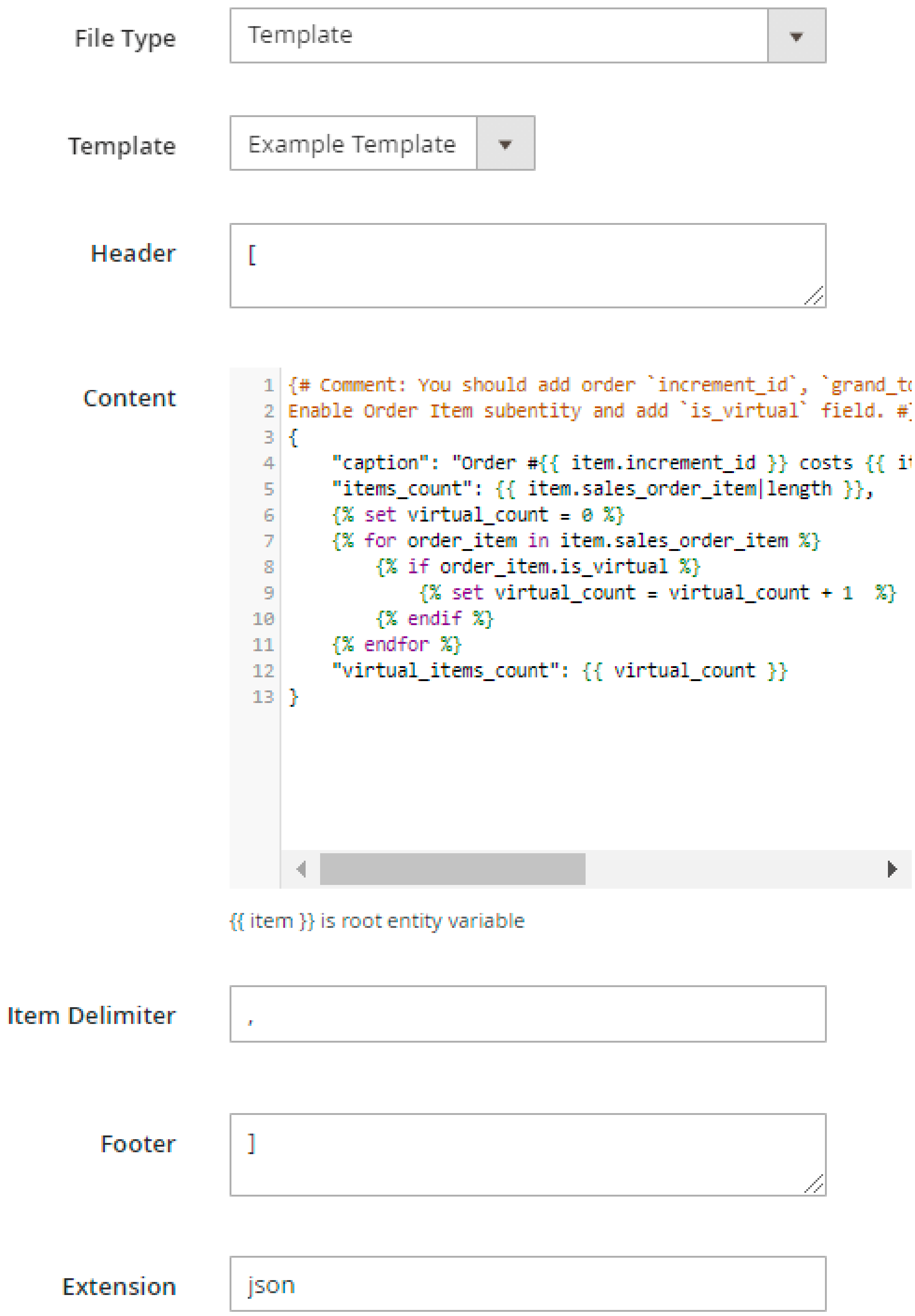


For **JSON** specify:

- Header
- Footer

For **Template**:

Using the **Template** option, you can build a unqiue file suitable for specific needs. Thanks to the integrated Twig PHP template engine, you can create any template you want to:

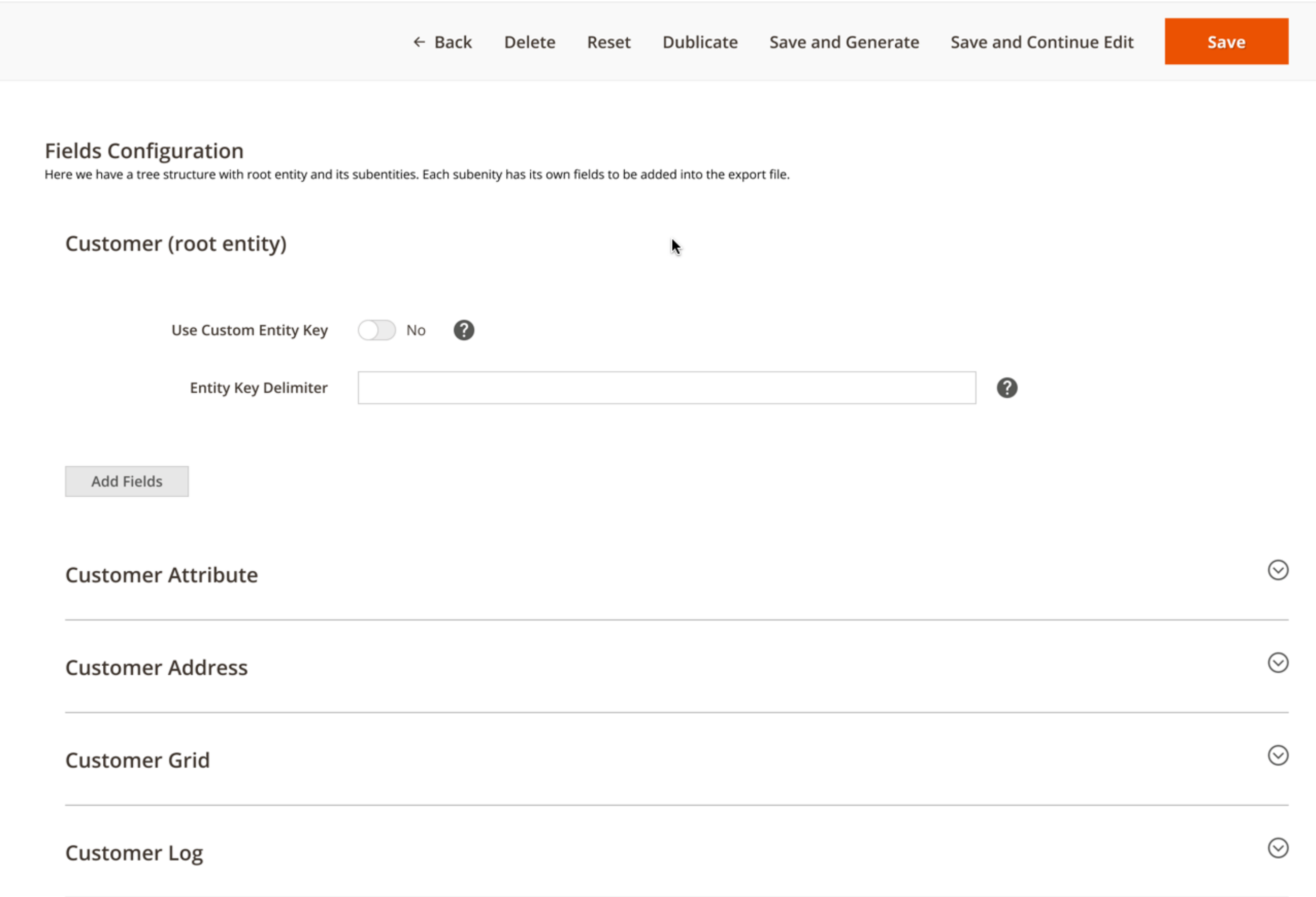


See Twig documentation to learn more about the features and configuration.

Fields Configuration

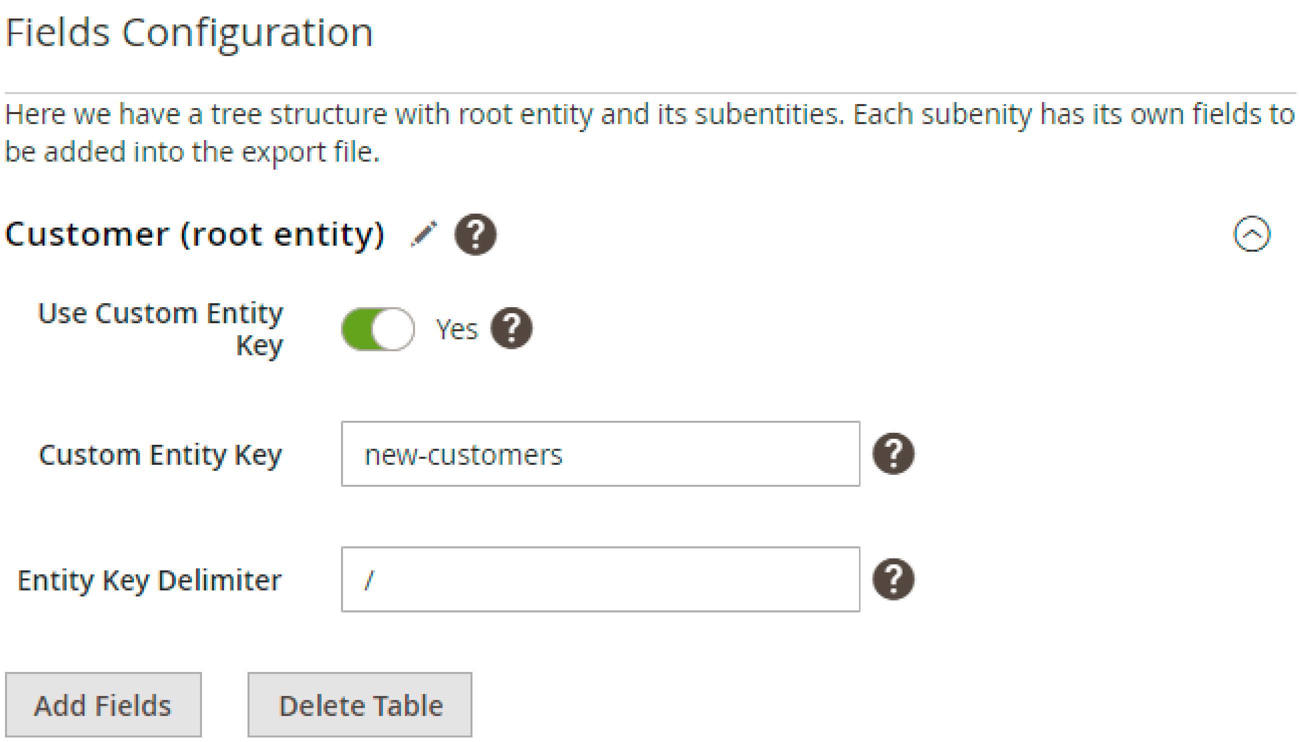
In the following step, you can start building your customer export file by choosing the data to export. The functionality has a tree structure. Thus, you can add any entity, any field within a particular entity, customize prefixes/tags/delimiters, and so on to match the requirements of the system you are exporting to.

See how the tree-structured file is built:

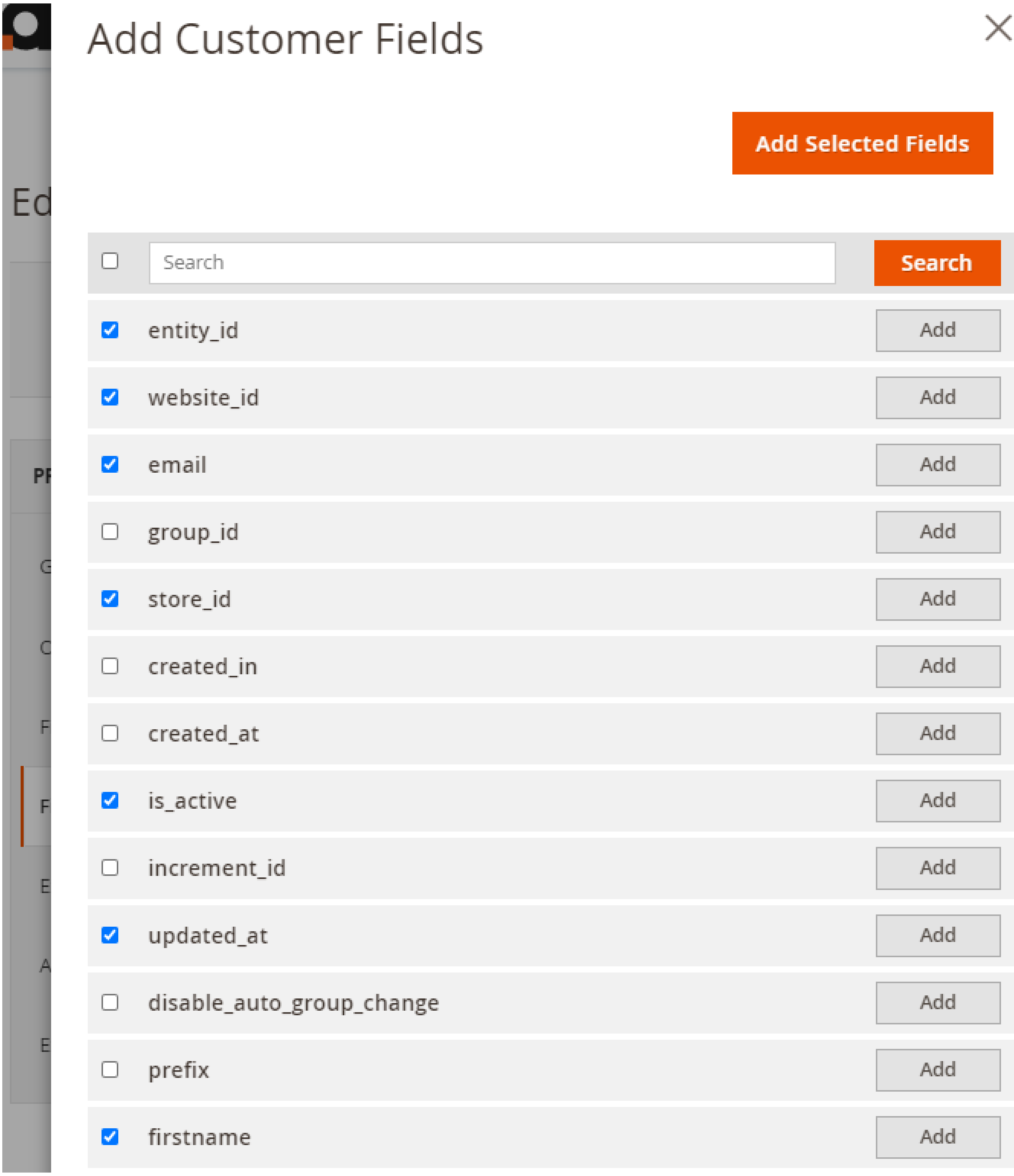


Step 1. Add root entities

First, please configure the basic customer entity and select the fields that will be added to the file on the root level.

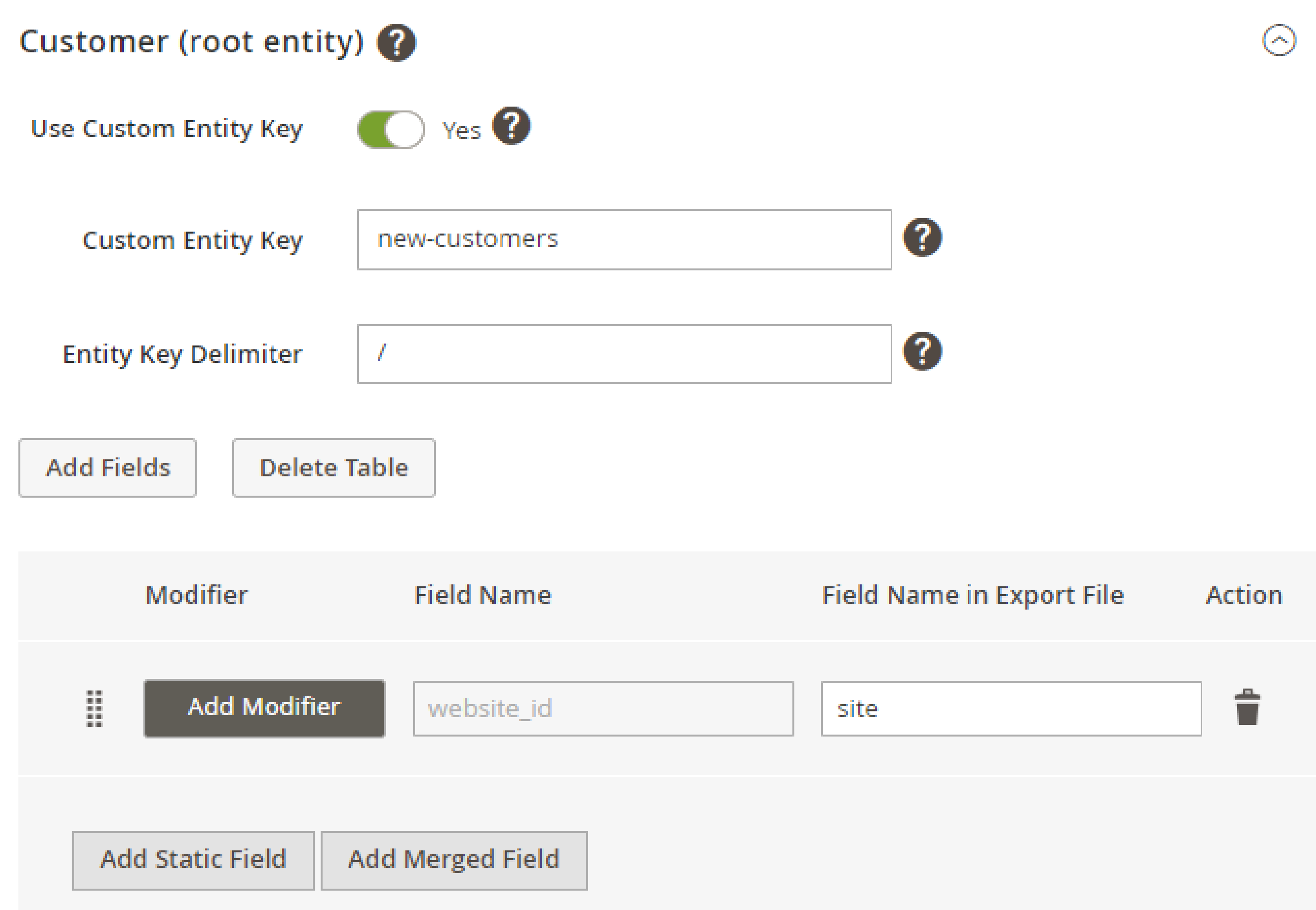


Click **Add Fields** button and choose the needed data to add to the export file.

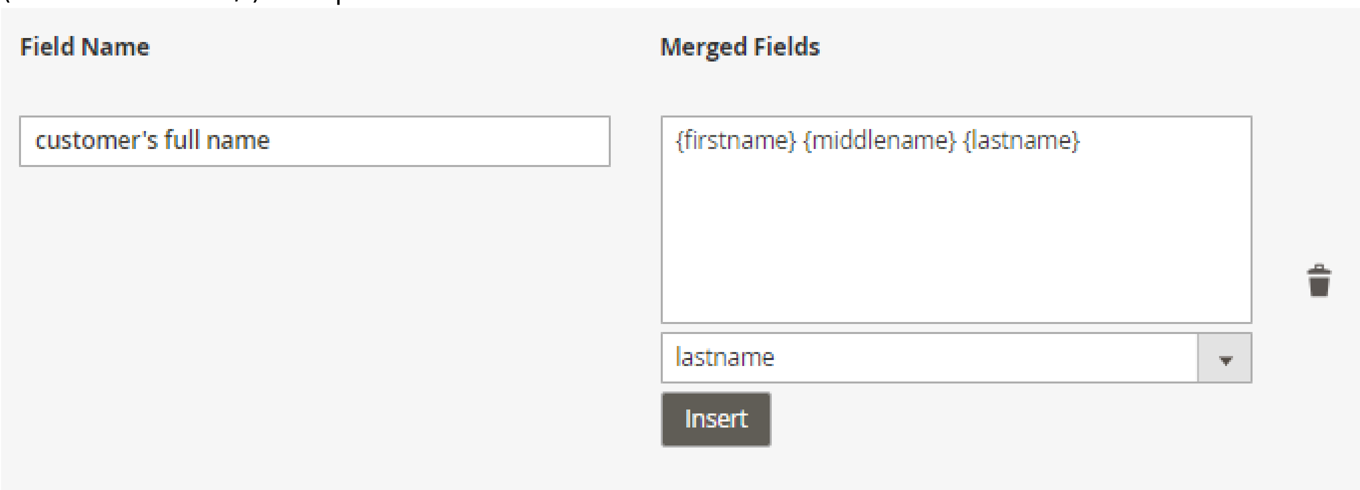


You may also use a search window right in the popup to find the required fields faster. After choosing all needed fields, click **Add Selected Fields**.

When a field is added, you can customize a column title that will be displayed in the exported file. Also, you can use the **Add Static Field** button to create columns that will remain unchanged in the file.



By clicking the **Add Merged Field** button, you can create custom columns that combine data from multiple fields. Also, it’s possible to customize the names of these columns and use symbols or words (such as 'and' or '/') to separate the data within them.



Please note that adding merged fields is available as a part of an active product subscription or support subscription.

Customize fields sorting within each entity using the **drag-and-drop** option.

For each file level, you can set custom entity keys and field names. See how it works:

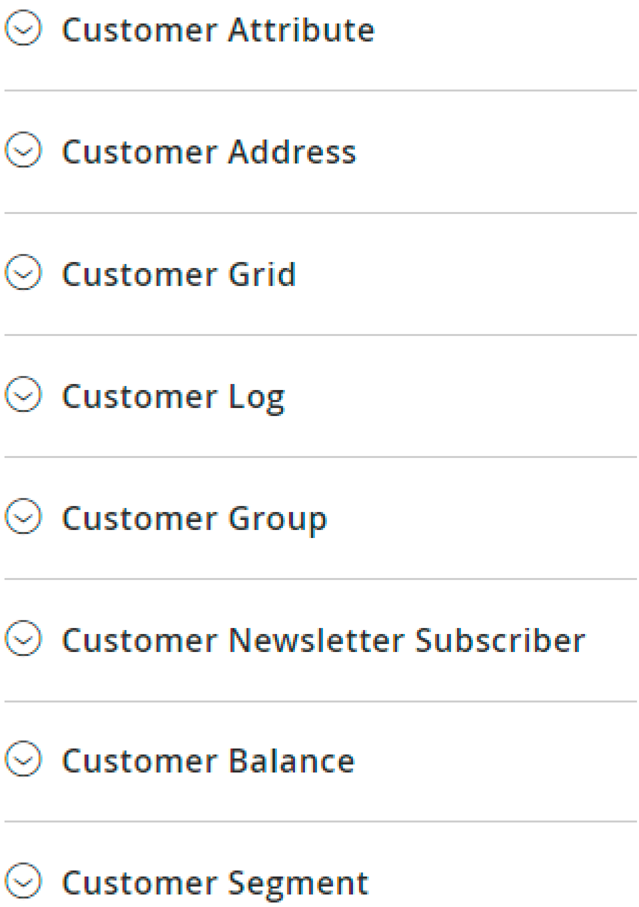
customer_entity_2020-08-28T15_13_21+00_00

email	firstname	customer_address_entity.city	customer_address_entity.postcode	customer_log.customer_id
roni_cost@example.com	Veronica	Calder	49628-7978	
tom@smith.com	Tom	Brockton	2301	2
		Abington	2351	
sophia@stewart.com	Sophia	Avon	2322	
		Bellingham	2019	
jacob@price.com	Jacob	City	11038	
		CityM	62266	
william@reed.com	William	Chelmsford	1824	
		Chicopee	1020	

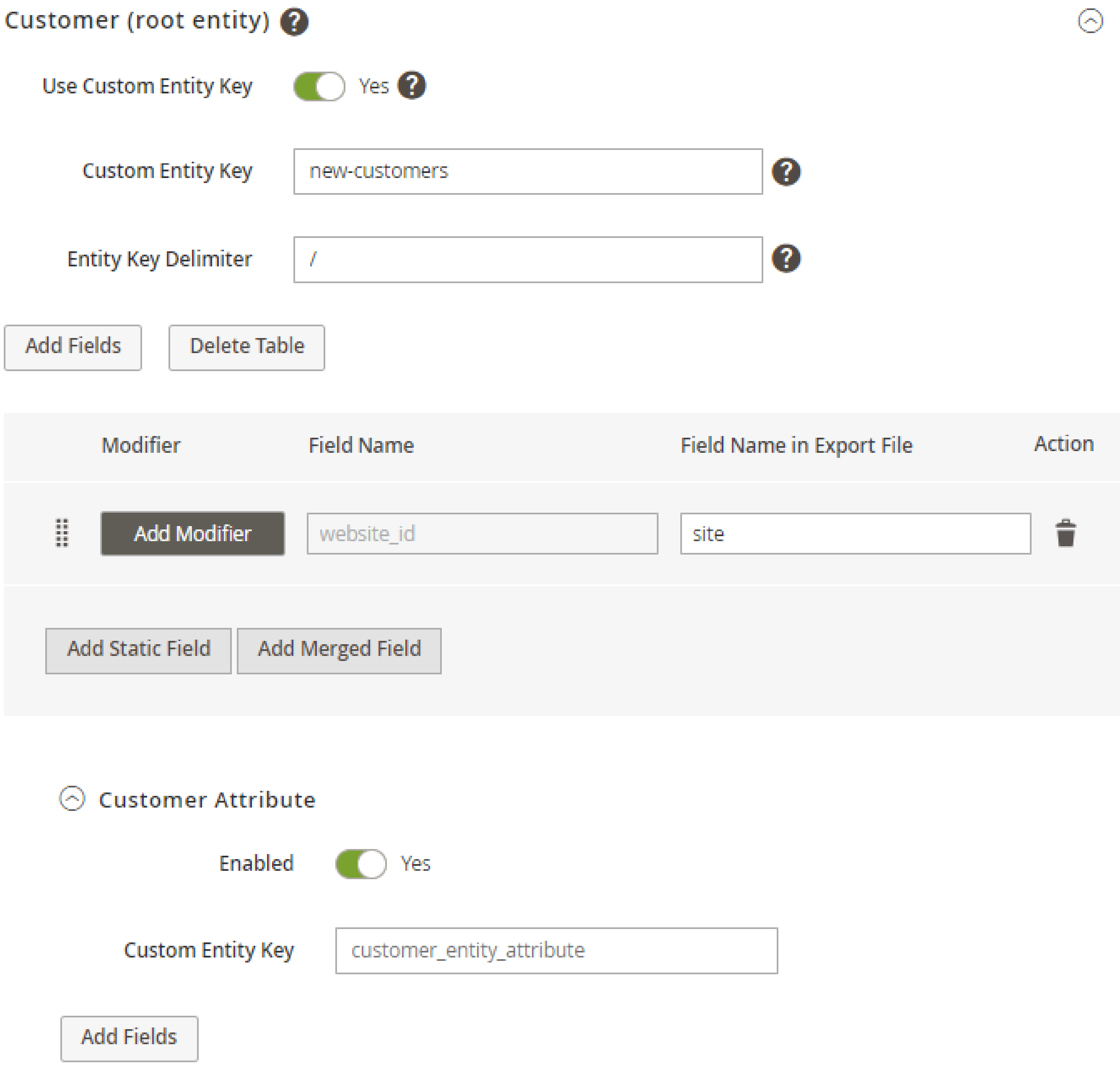
Step 2. Add subentities

Then you can go down the entity list and enable any of them you need for your export file.

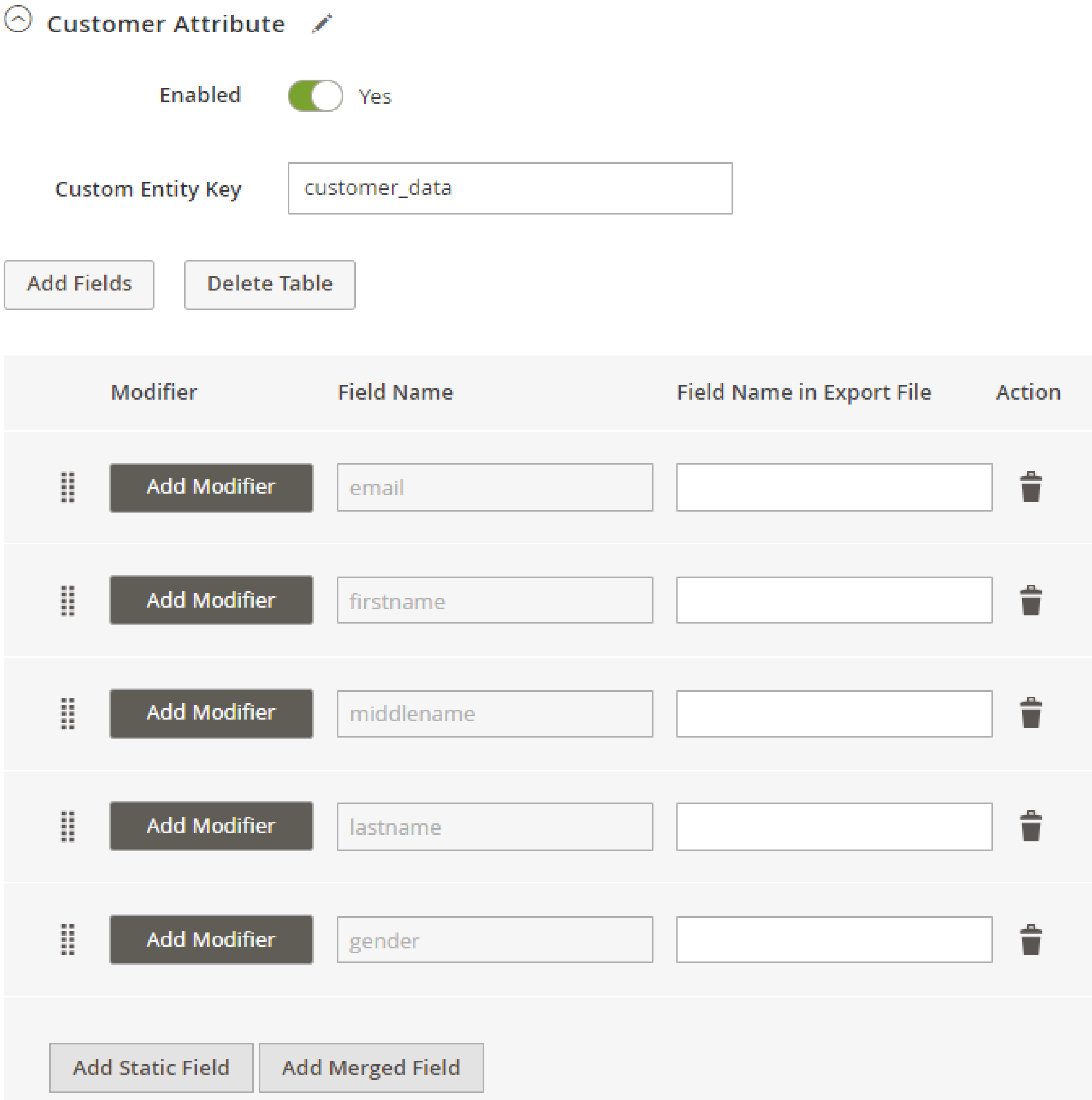
See all available subentities:



See how it works:



Just click the **Enabled** toggle and **Add Fileds** button. As was described above, a popup will appear and you will be able to add all the required fields concerning a particular entity. For example, for the **Customer Attribute** entity, you may add customer name, email, group id, etc.



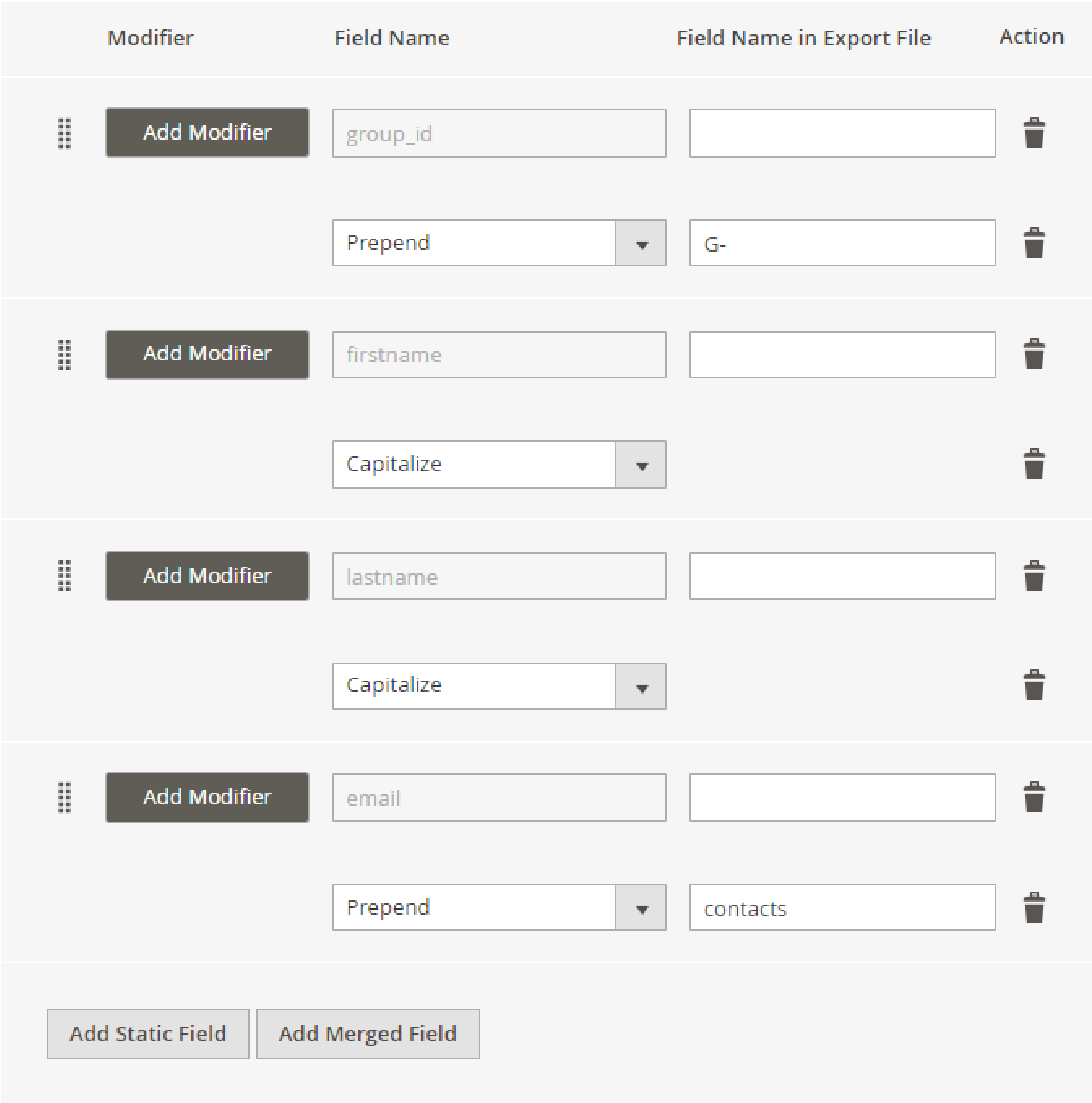
The same can be done for the entities with a lower level.

This way, you can build a unique profile, suitable for a particular system. Check the requirements from a system (as, for example, different ERP or CRM systems may require different customer data) and match the details.

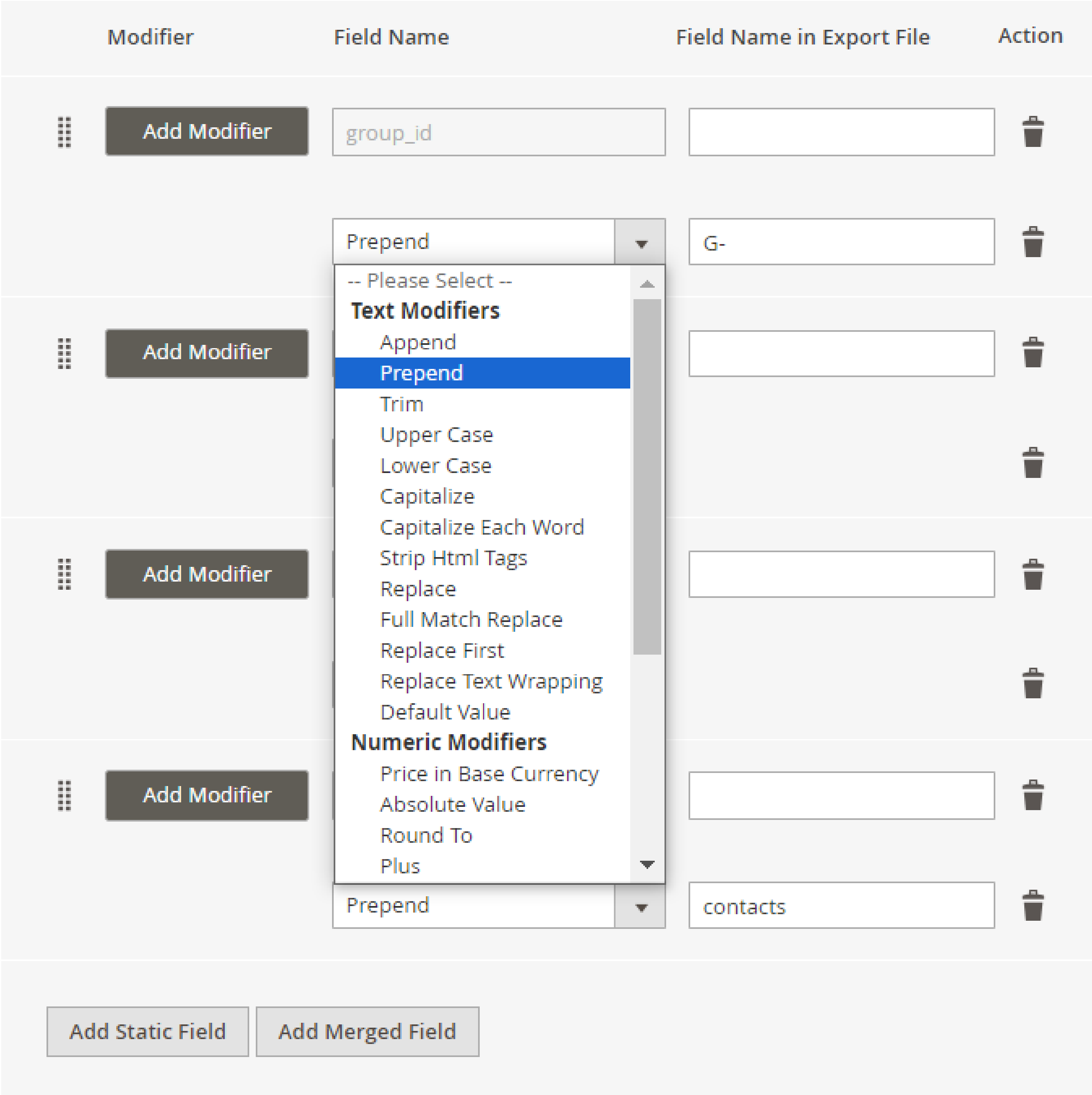
Modify Values in Export Files

Now you can use modifiers to change the values in the export file. For example, you can change the date format, add any text and apply various mathematical actions to prices (e.g. rounding, multiplication, etc.).

Modifiers are added right during the fields configuration.



Hit the **Add Modifier** button and choose the required action in a dropdown.



Types of modifiers you can use:

- **Text Modifiers:** Adjust the text of the text values by appending, prepending, capitalizing, etc.
- **Numeric Modifiers:** Use for number modifications, e.g. rounding prices.
- **Date Modifiers:** Specify a suitable date format and a timezone.
- **Custom Modifiers:** Replace the output of one field with the value of another.

Text Modifiers

Append - Adds the text after the value in the column. The text is specified in an additional field that appears when this modifier is selected.

Prepend - Adds text before the value in the column. The text is specified in an additional field that appears when this modifier is selected.

Capitalize - After selecting this modifier, the value in the column is capitalized.

Lower Case - After selecting this modifier, the whole word is written in lowercase.

Upper Case - After selecting this modifier, the entire word in a value field is capitalized.

Capitalize Each Word - After selecting this modifier, each word starts with a capital letter.

Strip Html Tags - Modifier removes all HTML tags from the string (the modifier is useful when exporting meta titles, descriptions, etc.).

Replace - After choosing this modifier, 2 fields appear: in the first one we indicate the word that needs to be replaced, and in the second one - the word to be replaced with.

Full Match Replace modifier functions similarly to the **Replace** modifier. However, it only replaces the value from the first field (**From**) with the value from the second field (**To**) when the value from the first field is fully matched.

*For example, if you specifically need to replace only '2' with '3', it's better to choose the **Full Match Replace** modifier. This is because if you opt for the **Replace** modifier instead, specifying **From**: '2' and **To**: '3', it might result in '122' being replaced with '133' due to the presence of '2'.*

Replace First - the same as Replace, but for the first case only.

Replace Text Wrapping - After selecting this modifier, the wrapping of multiline text is replaced with space by default. You can remove the space in the dependent field and enter another character you'd like to replace the wrapping of multiline text with.

Default value - When this modifier is selected, indicate the value that is added to the corresponding column by default (there is already a **`defaultValue`**).

Trim - This modifier removes spaces from the beginning and the end of the string (there is already a **`trim`**).

Numeric Modifiers

Price - Modifier adds currency to the value in the column.

Absolute Value - Modifier changes the negative value in the column to positive. Example: was **-5** → now is **5**.

Round To - When this modifier is selected, an additional field appears, in which we indicate the number of decimal places to which we round the number in the column. Example: **33.75** → enter 1 → get **33.8**.

Plus - When this modifier is selected, indicate the number that is added to the number in the column.

Minus - Indicate the number that is subtracted from the number in the column.

Multiplied By - Specify the number that is multiplied by the number in the column.

Divided By - Provide the number by which the number in the column is divided.

Modulo - Indicate the number by which the number in the column is divided, and when division occurs, we get the remainder of the division in the export file. Example: we have **10**, entered the number 3, received **1** in the file.

Truncate - Modifier removes decimal numbers without rounding. For example: **33.75** → Truncate → **33**.

Ceil - Modifier allows you to round a number up to the nearest whole number.

Floor - Modifier allows you to round a number down to the nearest whole number.

Date Modifiers

Date Format - Specify the date format that is applied to the date in the file.

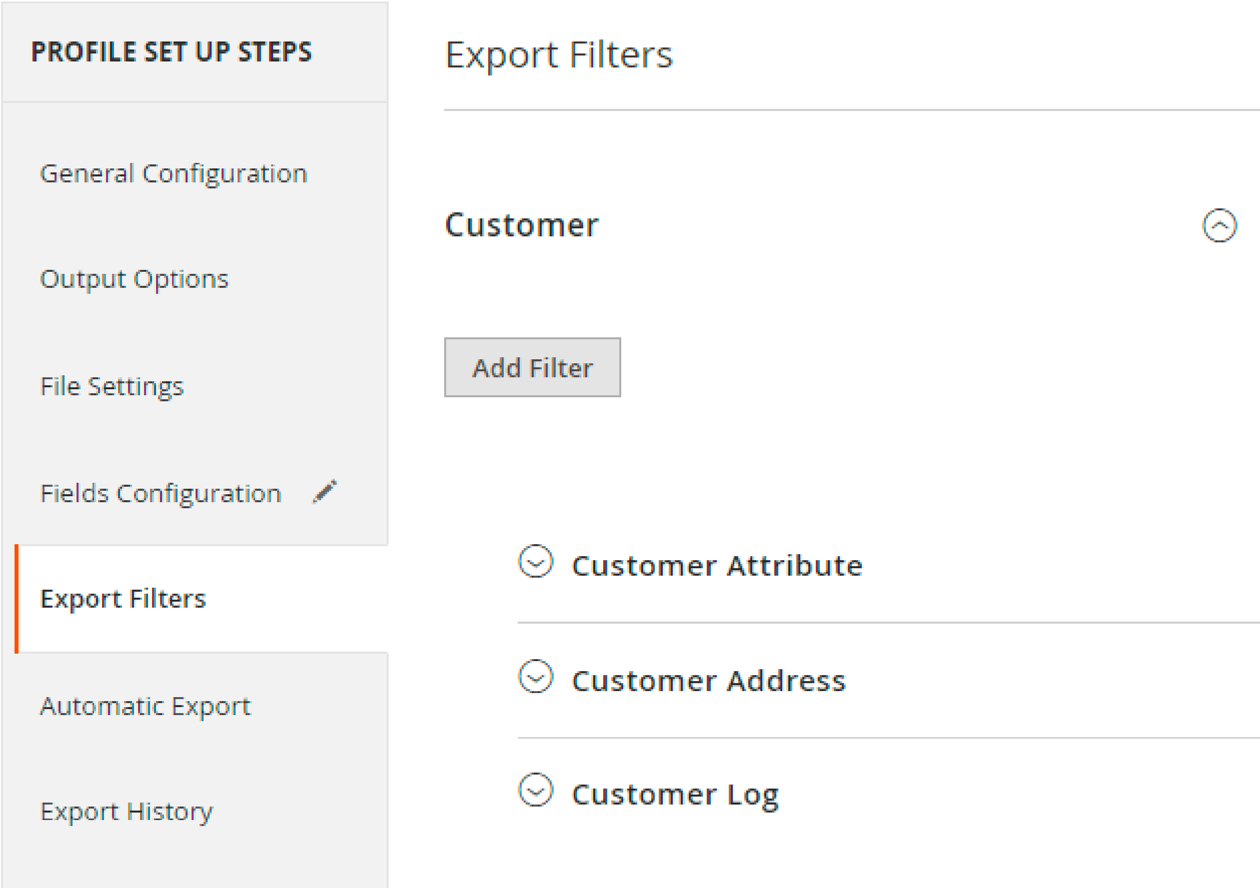
Apply Timezone - Choose the modifier for a timezone in UTC format.

Custom Modifiers

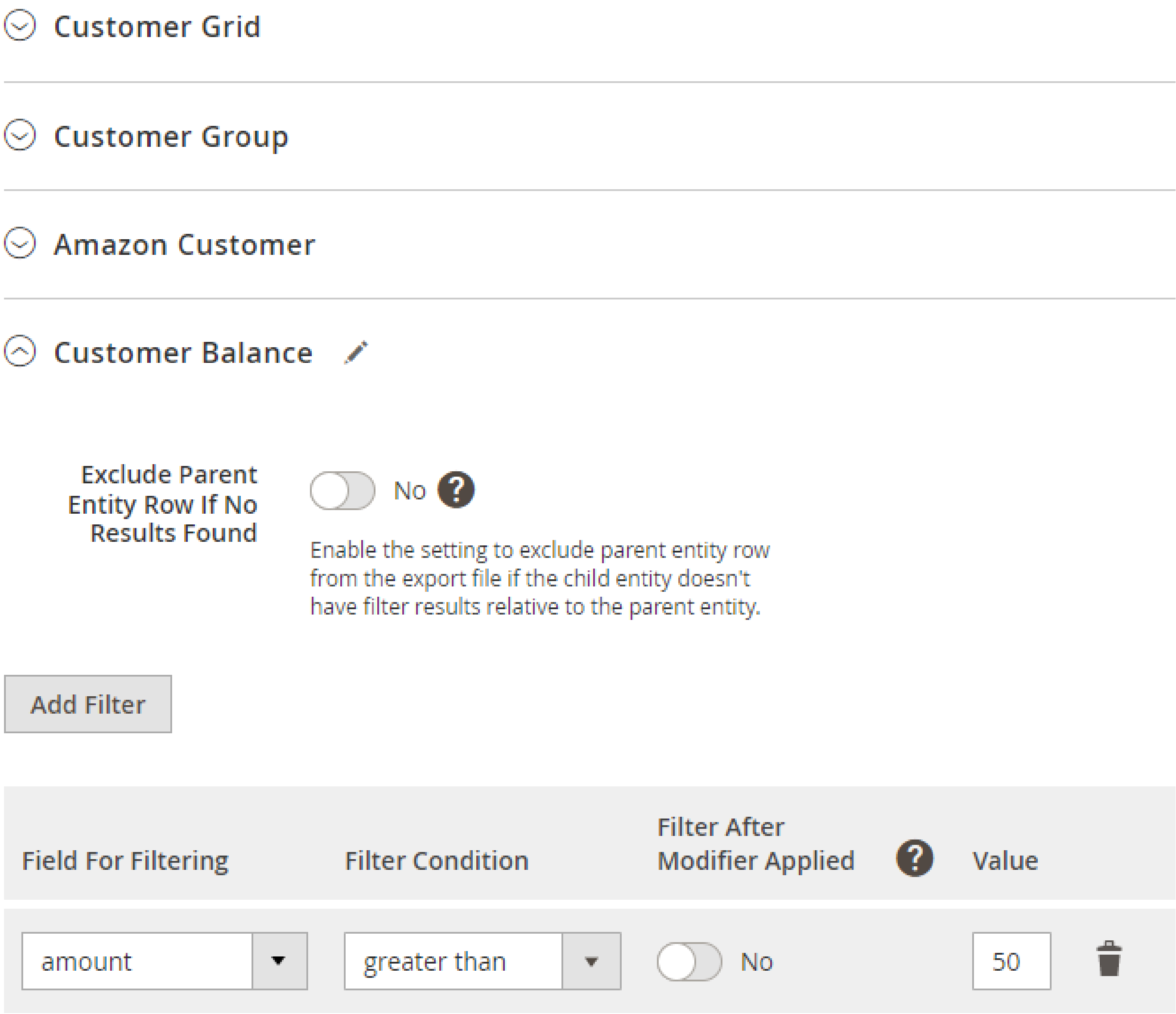
Custom modifiers replace the output of the value of one field with the value of another. For example, *Value to Label*: instead of *value*, the *label* will be displayed. Or, for instance, *set id to set name*: instead of *id*, the *name* will be displayed.

Export Filters

Here you can apply filters to specify what customer data should be exported. The values of all entities and fields available in the *Fields Configuration* are available for filtering as well. For example, you may add the customers from a particular country or customers with a particular balance.

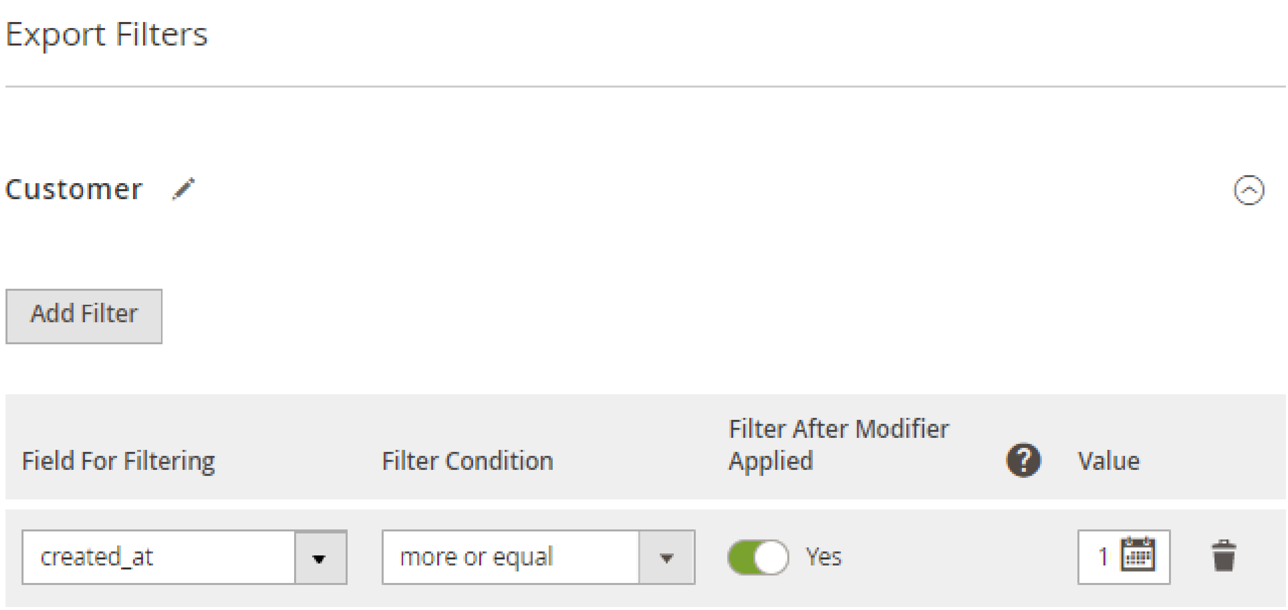


Expand the necessary entity, click **Add Filter**, and specify the value you need to export.



Additionally, you can use specific filters for the *Date* parameter, e.g. export customers registered in the **last X days** or weeks.

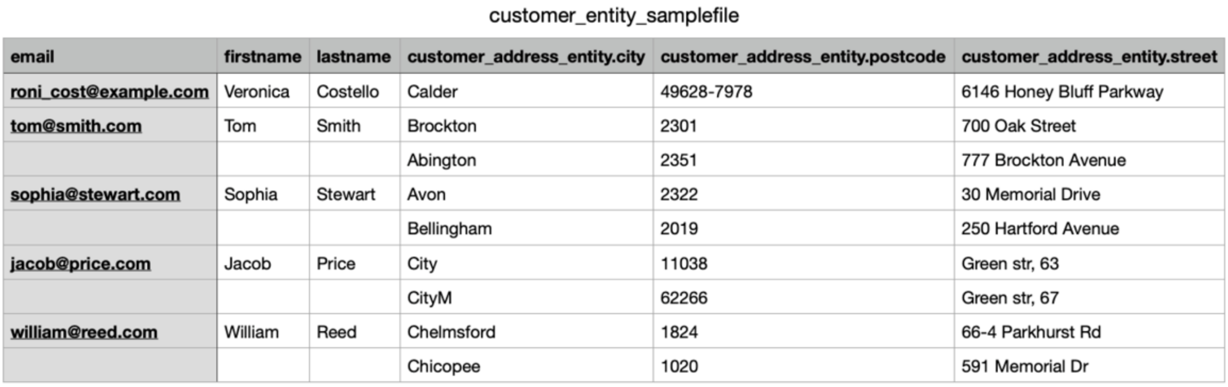
Filter After Modifier Applied - check this toggle to filter data only after apllying particular modifier. For example, you can modify the timezone and apply date filter to the 'created_at' field after the modification.



Please make sure the field with a corresponding modifier is added to the export file. Otherwise, the setting won't be applied.

You can also **Exclude Parent Entity Row If No Results Found**. It means that the parent entity row will be excluded from the export file if the child entity doesn't have filter results relative to the parent entity.

Check how it works:



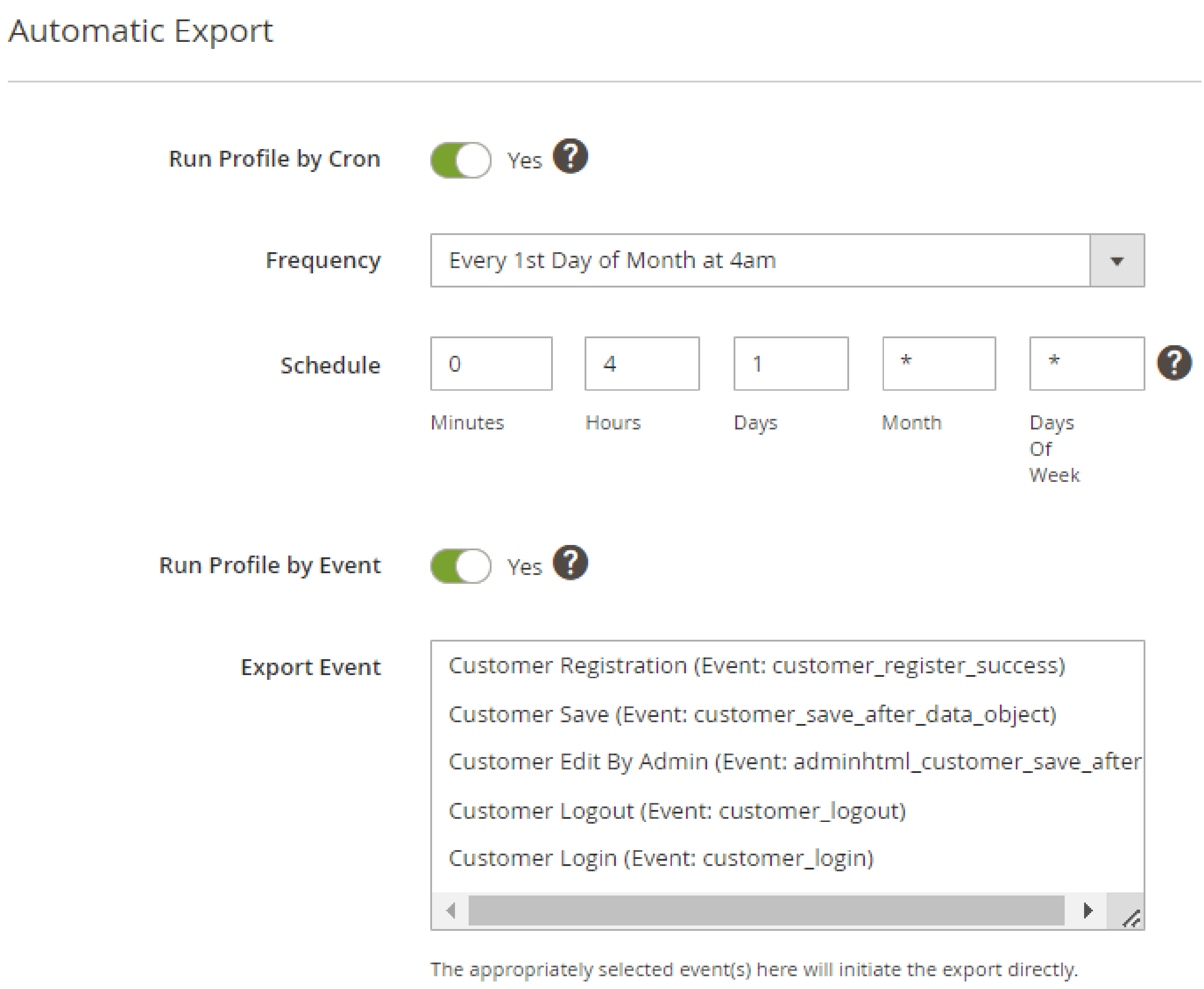
customer_entity_samplefile

email	firstname	lastname	customer_address_entity.city	customer_address_entity.postcode	customer_address_entity.street
roni_cost@example.com	Veronica	Costello	Calder	49628-7978	6146 Honey Bluff Parkway
tom@smith.com	Tom	Smith	Brockton	2301	700 Oak Street
			Abington	2351	777 Brockton Avenue
sophia@stewart.com	Sophia	Stewart	Avon	2322	30 Memorial Drive
			Bellingham	2019	250 Hartford Avenue
jacob@price.com	Jacob	Price	City	11038	Green str, 63
			CityM	62266	Green str, 67
william@reed.com	William	Reed	Chelmsford	1824	66-4 Parkhurst Rd
			Chicopee	1020	591 Memorial Dr

Automatic Export

Configure the frequency to run the profile. You can choose to run a profile:

- by Cron
- by Event



For exporting **by Cron**, you can set one of the ready-made schedules or create a custom one.

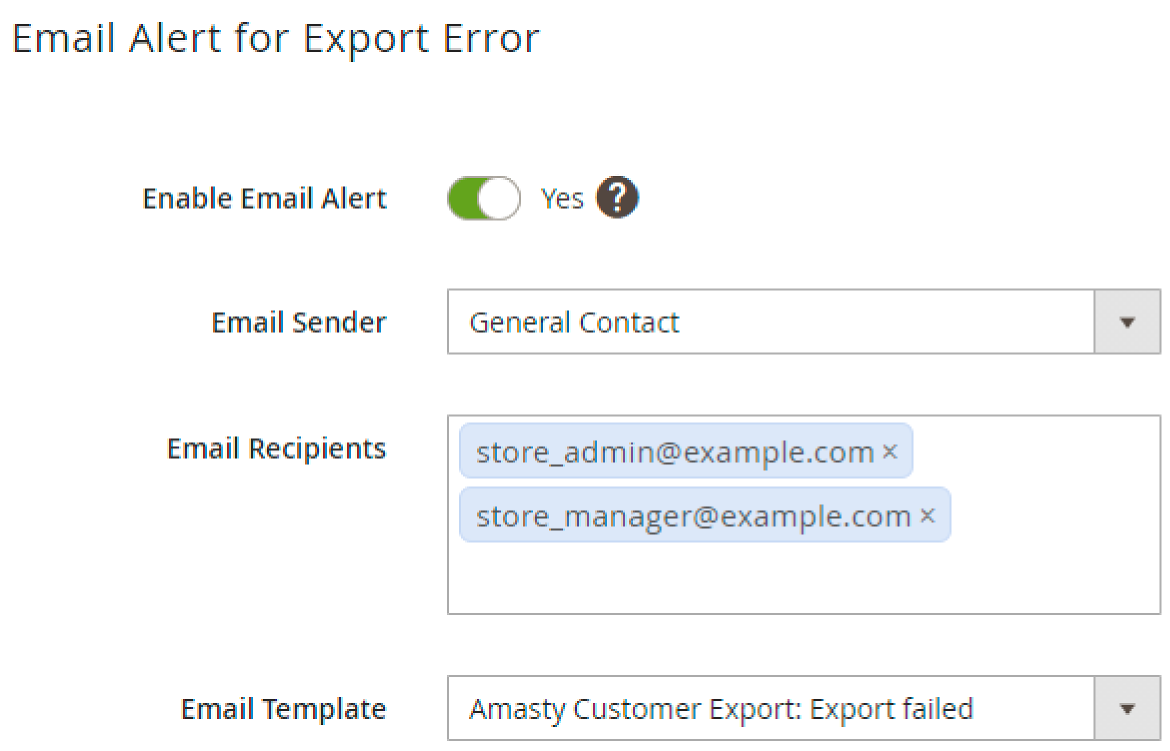
For exporting **by Event**, choose the event that will trigger a profile export. For now, the following export events are available:

- Customer Registration
- Customer Save
- Customer Edit by Admin
- Customer Logout
- Customer Login

Please note that the **Customer Save**, **Customer Edit by Admin**, **Customer Logout**, and **Customer Login** events are only available with an active product subscription or support subscription.

Alert Notifications

Using this tab, you can enable email notifications about errors for a particular profile.



Enable Email Alert - set to *Yes* to notify the recipients about failed exports.

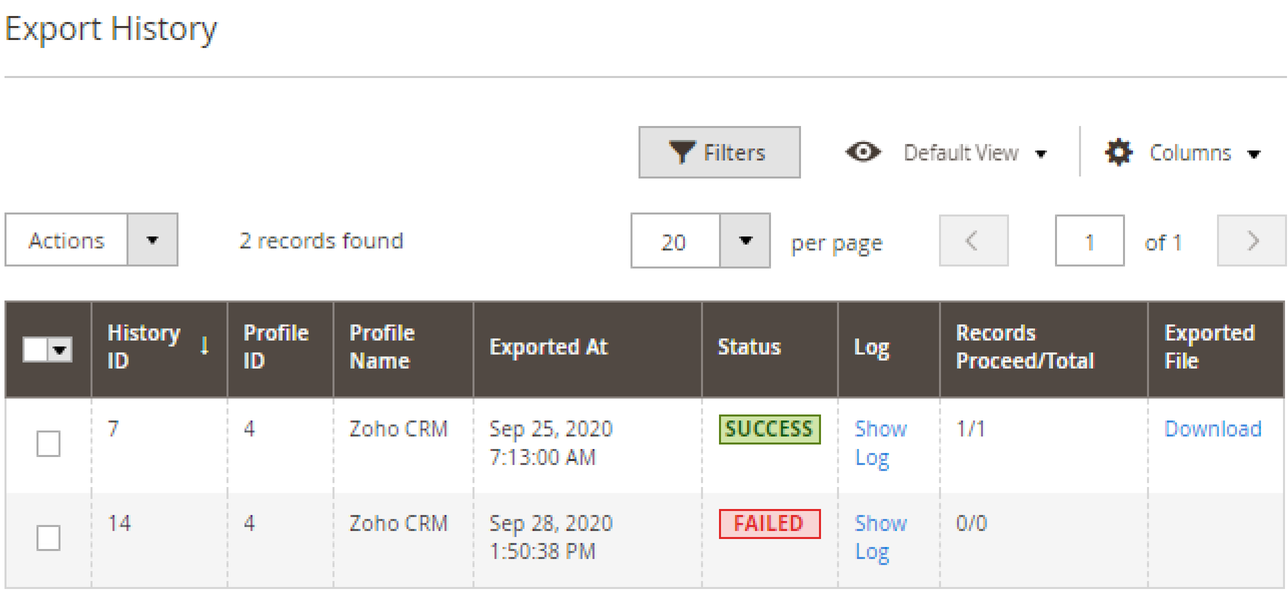
Email Sender - choose the contact that will send automatic emails.

Email Recipients - set to whom the emails will be sent.

Email Template - select the template for failure notifications.

Profile Export History

You can monitor the dynamics of each particular customer export profile right in its settings, in the **Export History** tab. Check the statuses, dates, logs, and the exported number of customers. Download a file if necessary.

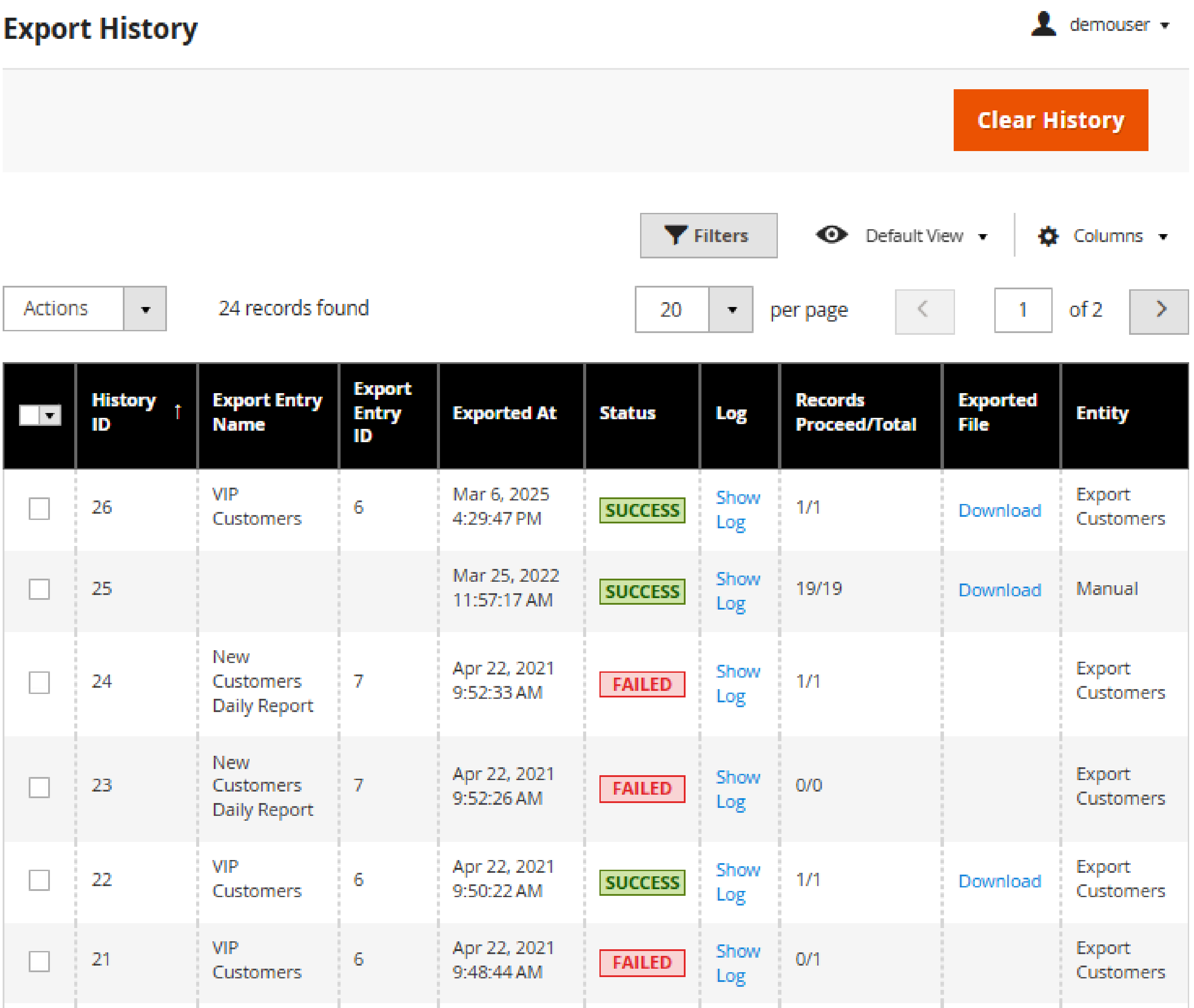


History ID	Profile ID	Profile Name	Exported At	Status	Log	Records Proceed/Total	Exported File
7	4	Zoho CRM	Sep 25, 2020 7:13:00 AM	SUCCESS	Show Log	1/1	Download
14	4	Zoho CRM	Sep 28, 2020 1:50:38 PM	FAILED	Show Log	0/0	

To see the history immediately after the export, please, reload the page.

General Export History

You may also track the logs for all customer exports (one-time, cron jobs, and profiles) in one place. Navigate to **System → Amasty Export → Export History**. See the statuses and check details to get a full picture.



History ID	Export Entry Name	Export Entry ID	Exported At	Status	Log	Records Proceed/Total	Exported File	Entity
26	VIP Customers	6	Mar 6, 2025 4:29:47 PM	SUCCESS	Show Log	1/1	Download	Export Customers
25			Mar 25, 2022 11:57:17 AM	SUCCESS	Show Log	19/19	Download	Manual
24	New Customers Daily Report	7	Apr 22, 2021 9:52:33 AM	FAILED	Show Log	1/1		Export Customers
23	New Customers Daily Report	7	Apr 22, 2021 9:52:26 AM	FAILED	Show Log	0/0		Export Customers
22	VIP Customers	6	Apr 22, 2021 9:50:22 AM	SUCCESS	Show Log	1/1	Download	Export Customers
21	VIP Customers	6	Apr 22, 2021 9:48:44 AM	FAILED	Show Log	0/1		Export Customers

You can easily identify the export method in the **Entity** column:

- **Manual** - one-time exports;
- **Cron** – exports via cron job interface;
- **Export Customers** – profile exports.

To see the history immediately after the export, please, reload the page.

REST API and CLI requests

It is possible to run import and export profiles using the REST API and CLI.

REST API:

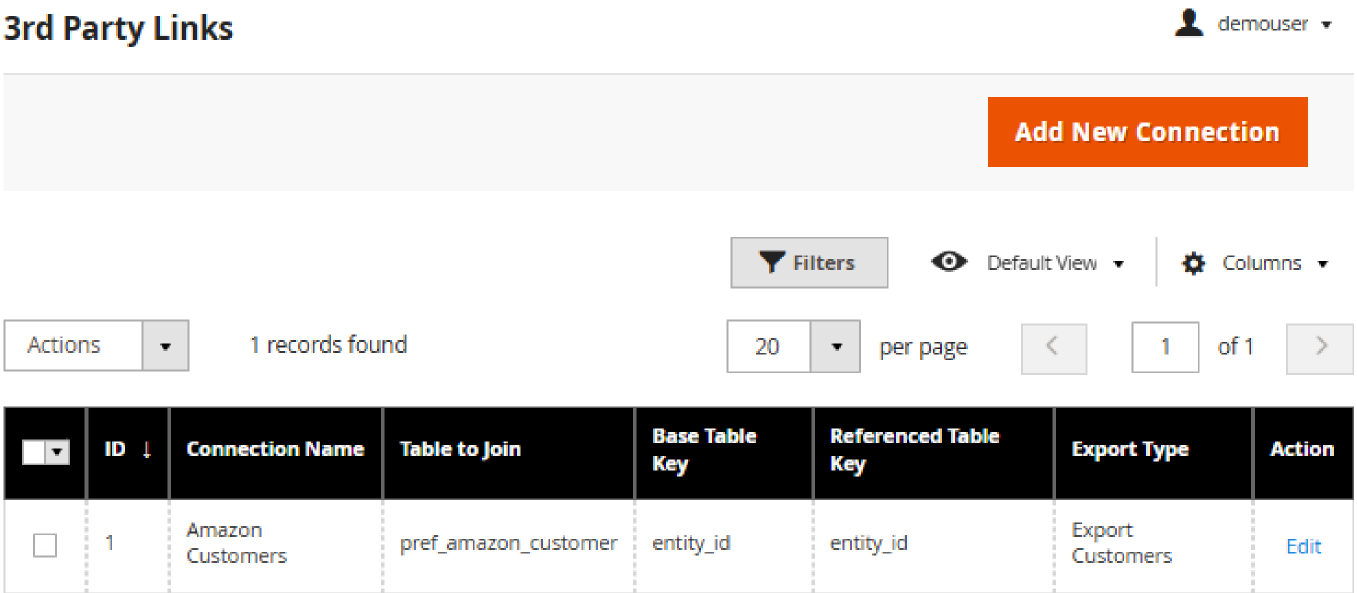
- “/V1/am_import_export/get_profile_runners/” method=“GET” - to get available profile runners
- “/V1/am_import_export/run_profile/” method=“POST” - to run a profile
- “/V1/am_import_export/check_profile_status/” method=“POST”- to check profile status

CLI:

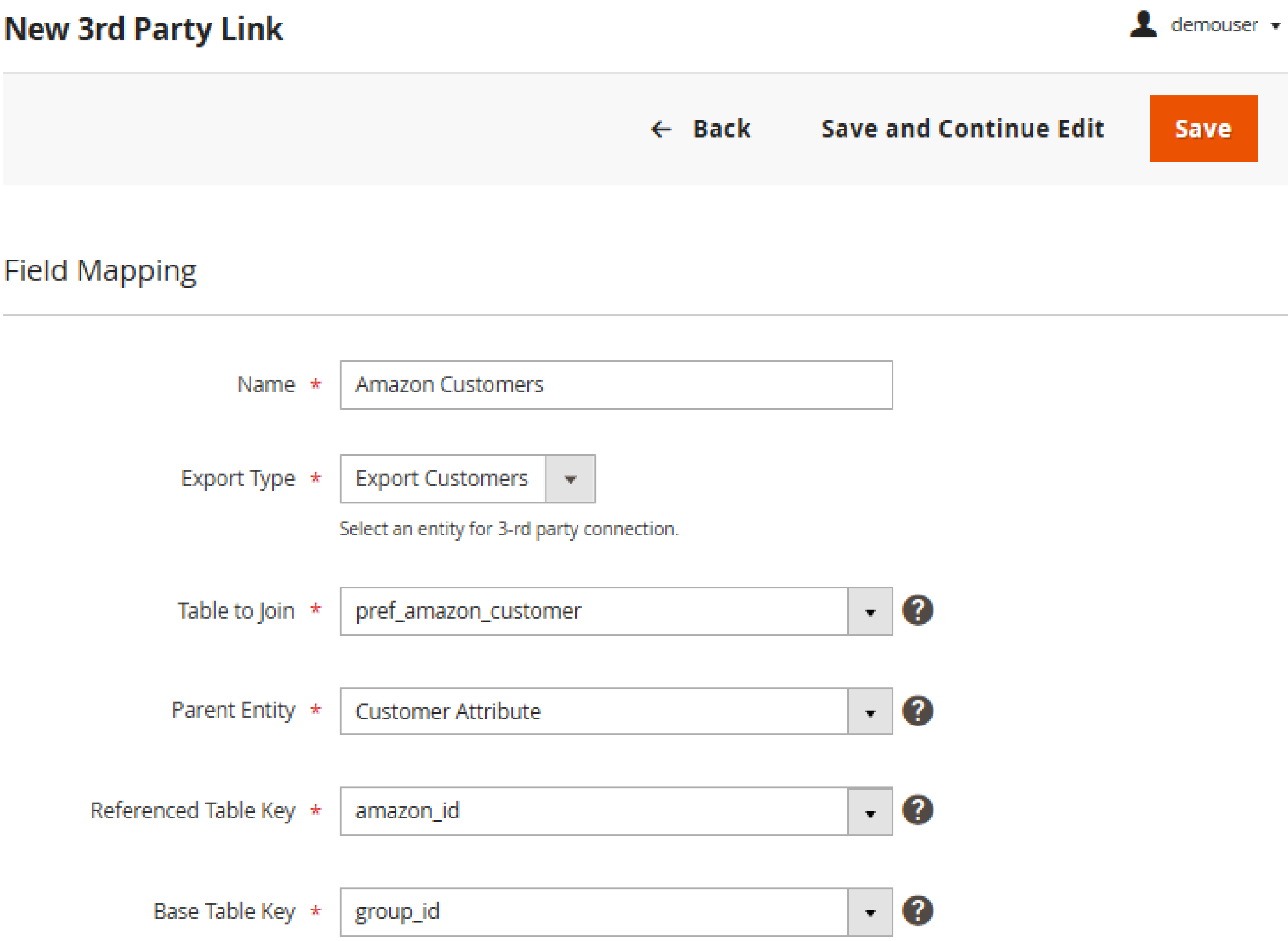
- php bin/magento am-import-export:show-profile-runners-list
- php bin/magento am-import-export:run-profile product_import_profile 1
- php bin/magento am-import-export:check-profile-status product_import_profile %identity_from_run_command%

3rd Party Connections

With the module, you can link the data generated by 3rd party extensions to the export functionality. All created connections are displayed in the **System → Amasty Export → 3rd Party Connections** tab.



Tap the **Add New Connection** button to create a new connection.



Name - add the connection title for internal usage.

Export Type - select the **Export Customers** for 3-rd party connection.

Table to Join - specify a table name that needs to be joined.

Parent Entity - choose the entity table to which the foreign table will be joined.

Referenced Table Key - the field from the foreign table, by which the table is chosen in 'Table to join' will be joined to the parent entity table.

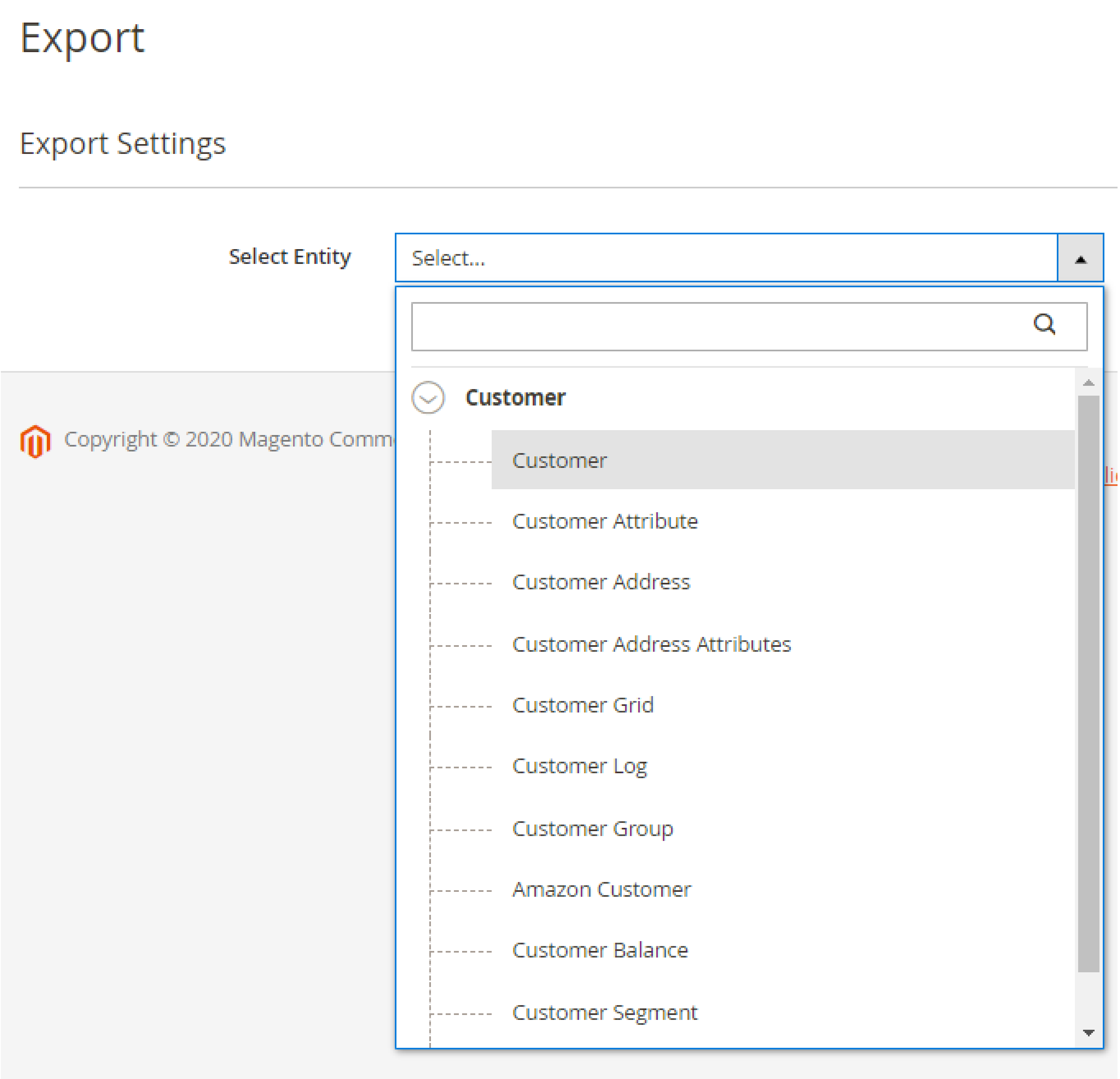
Base Table Key - specify the field from the parent entity table which will be used for joining with the foreign table.

Save the changes. Now you can add this entity to the export file.

Amasty Export: Fast & Simple

This extension has a simplified UI and helps to easily perform one-time operations. If you have only Export Customers extension, you will be able to export any customer entity, but if you have other export extensions by Amasty, you will easily export any available entity in one place.

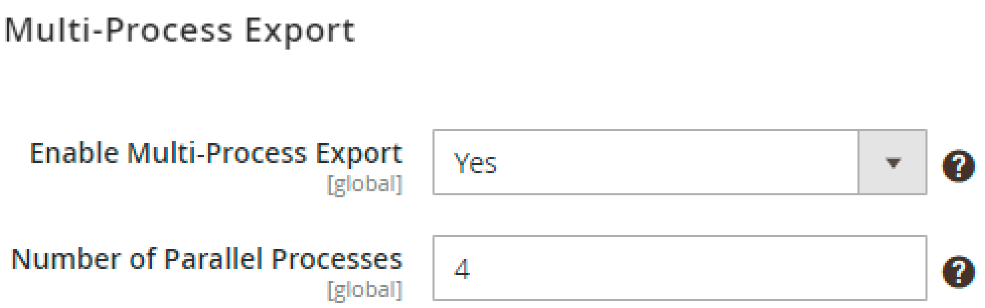
Go to **System → Amasty Export → Export** and select the entity to export.



As soon as you choose the entity, you will be able to configure other export details, such as format, title, included fields, etc. Explore the configuration details for each tab in the Export Profile Configuration sections.

General Settings

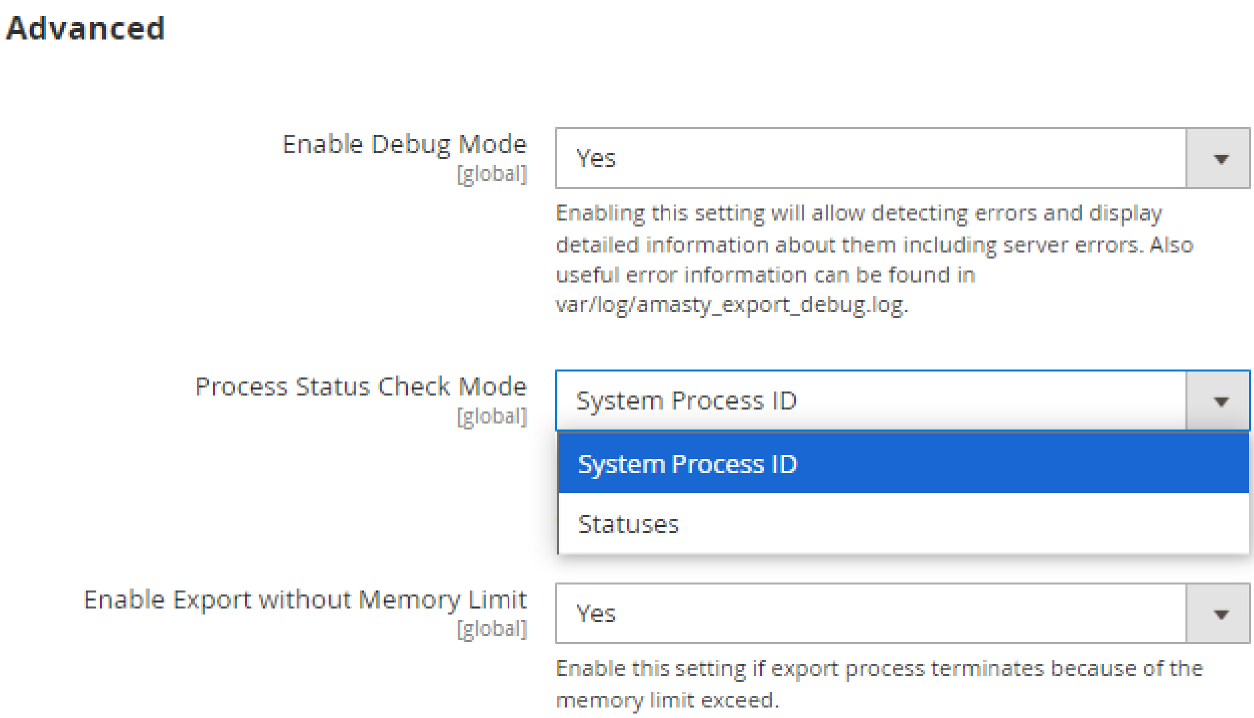
To configure the general options for Amasty Export, go to **Stores → Configuration → Amasty Extensions → Export**.



Enable Multi-Process Export - set to *Yes* to speed up the export.

The 'Multi-Process Export' feature requires the **PHP extension 'pcntl'** to be installed on the server. If you enable the feature and no performance boost happens, please ask your hoster/system administrator to check if the 'pcntl' extension is installed.

Number of Parallel Processes - specify the number of processes according to your server capabilities. The more parallel processes are set, the faster the export process goes, but the higher the server loads.



Enable Debug Mode - set to *Yes* to allow the system to detect errors and display detailed information about them in the popup (including server errors). Also, error information can be found in **var/log/amasty_import_debug.log**.

Process Status Check Mode - select the **Statuses** option if you are using a multi-node environment (this helps prevent possible errors). If you are not using a multi-node environment, please leave the **System Process ID** option selected.

Enable Export without Memory Limit - enable the setting if the export process terminates because the memory limit exceeds to allow using all available memory volume for the export process.

CLI PHP Path - using this option, you can check the Magento path which is used by our extension when running the commands directly during the processing of PHP requests. To change it, please run the following command:

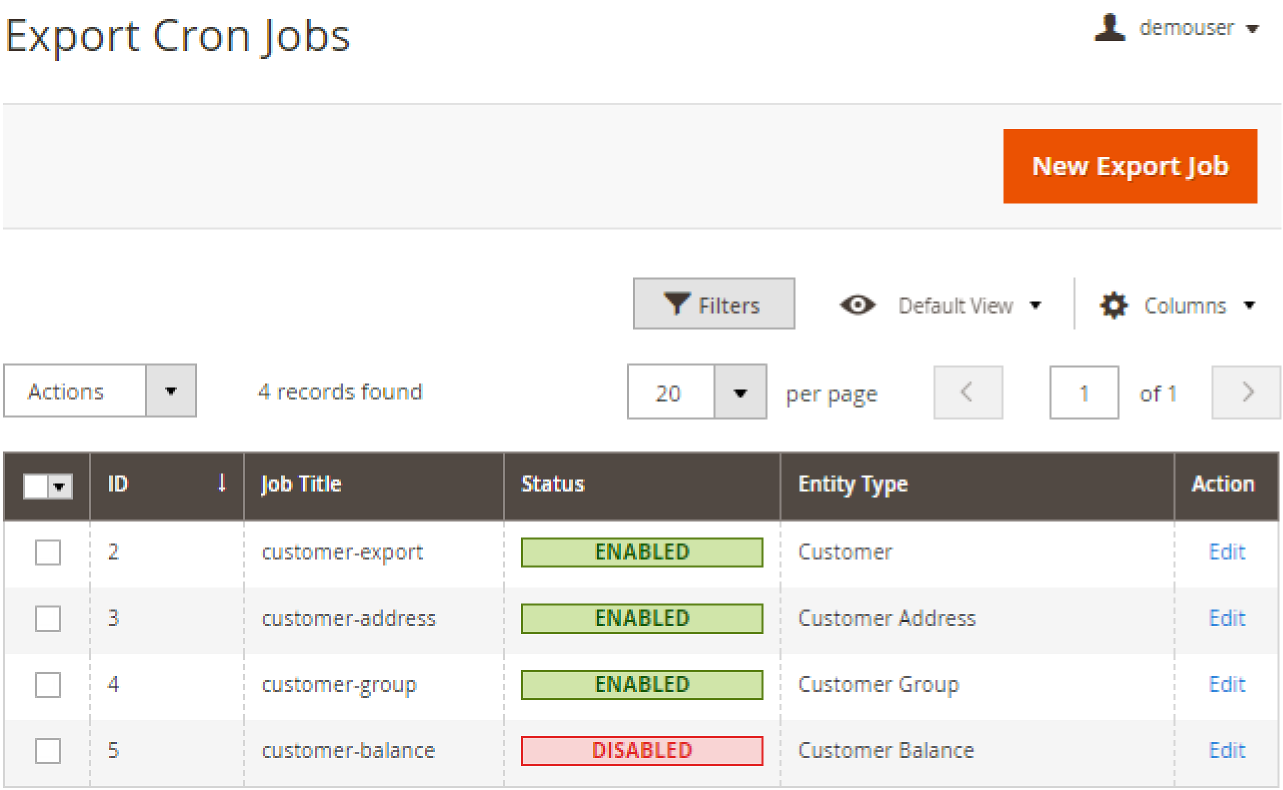
```
bin/magento config:set amasty_base/system/cli_php_path %CLI_PHP_PATH%
```

If you run a command and a new path is not displayed in this setting, please recheck the path you've specified. In case the path is incorrect, the changes won't be applied to the admin panel and you'll see the default path.

Amasty Export Pro

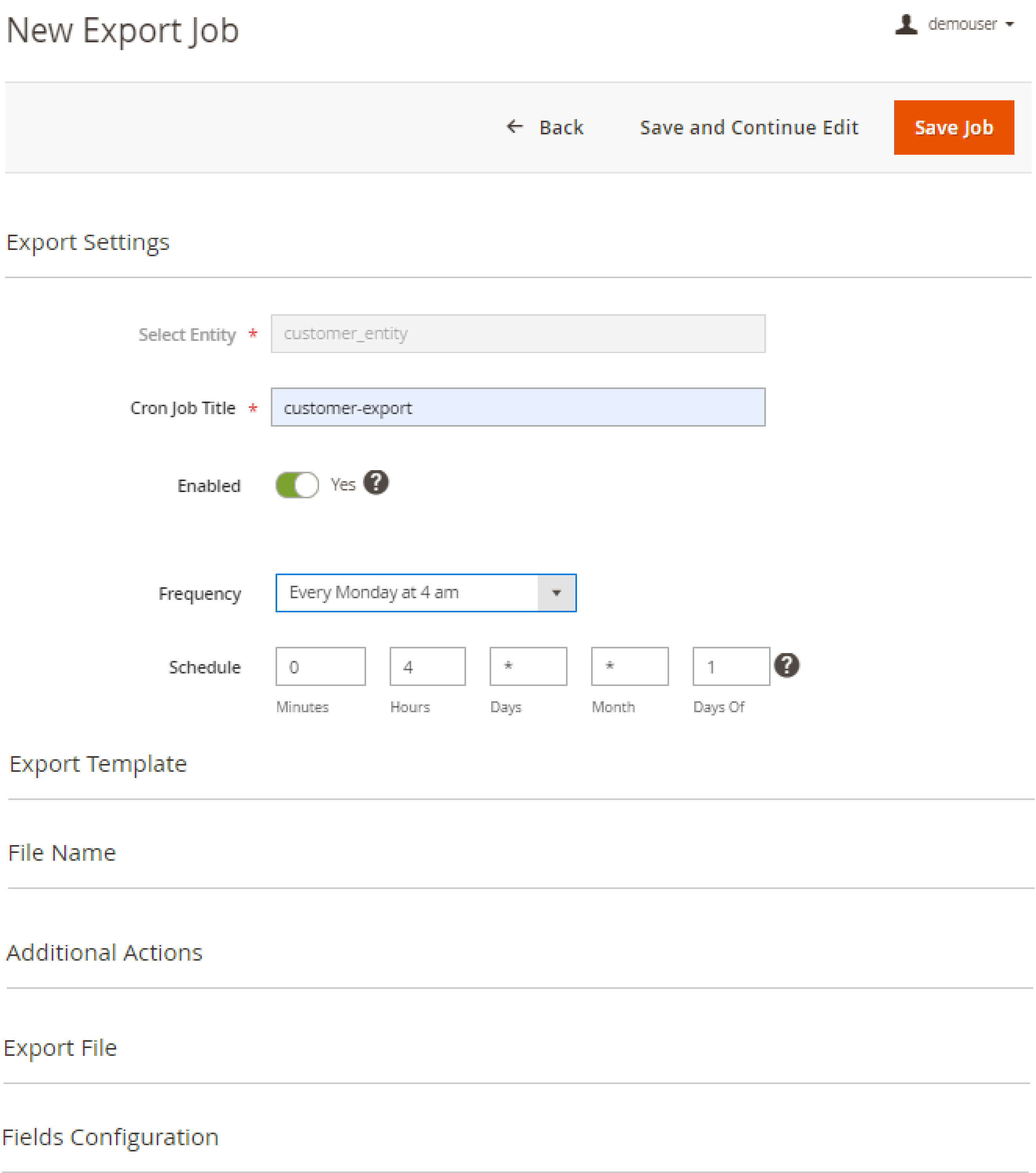
The extension also includes Amasty Export Pro features: you can create regular cron jobs to export any available entity.

Navigate to **System → Amasty Export → Cron Jobs**.



The more installed **Amasty Export extensions** you have, the more entities you can export by cron.

To create a new cron job, click **New Export Job**.



Indicate the cron job title for internal use and set the schedule for exporting. The file configuration algorithm is the same as described in the Export Profile section.

Additional packages (provided in composer suggestions)

To make additional functionality available, please install the suggested packages you may need.

Available as a part of an active product **subscription** or support subscription:

- **`amasty/module-export-merged-fields`** - This package provides the possibility of merging several export field values into one field.
- **`amasty/module-customer-export-subscription-functionality`** - This package provides new types of events to trigger customer exports.

Find out how to install the **Export Customers** extension for Magento 2 via Composer.