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For more details see how the Order Management Suite works.

Guide for Order Management Suite for Magento 2

Maximize the effectiveness of your order management workflow. Get extra order-related information, manage documentation in bulk and structure the database.

- Enrich checkout page with various order attributes
- Change documentation numbering and display custom statuses
- Extend the default order grid by applying extra columns and filters
- Manage orders in bulk using mass actions
- Cancel, archive and delete docs to keep only relevant data

The solution has 3 variations: Lite, **Pro** and Premium.

Let's find out the scope of features for each pack.

Order Management Suite Lite

The Lite version of the pack offers features for simplified processing. Try customization and visualization options to improve the basic management flow.

Cancel Orders

Improve customer loyalty and enhance your store usability by providing cancellation options right on the frontend. Monitor all cancellation requests in one place and automatically restock products with the Cancel Orders extension.

- Allow customers to cancel orders in accounts
- Show handy cancellation popup
- Provide cancellation reasons dropdown
- Track annulation requests in a separate grid
- Notify your managers about new cancellations
- Automatically restock canceled items

To adjust the basic extension setting, navigate to **Stores → Configuration → Amasty Extensions → Cancel Orders** tab.

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Cancel Orders 1.0.0 by amasty

ℹ️ Need help with the settings? Please consult the user guide to configure the extension properly.

General ⌃

Enabled
[store view]

Yes ▾

Allow for Selected Group(s)
[store view]

General
Retailer
Wholesale

Allowed Order Status(es)
[store view]

Pending
Processing
Suspected Fraud

Refund Paid Processing Orders Automatically
[store view]

Online (if possible) ▾

Disabled
Online (if possible)
Offline

See the detailed description of the available configuration in this guide.

Order Archive

Order Archive extension enables store administrators to easily delete or archive any orders they need to keep the order grid clean and up-to-date.

- Archive orders automatically
- Delete any orders permanently
- Schedule order archiving
- Send email notifications to admins

To configure general extension settings, please go to **Stores → Configuration → Amasty**

Extensions → Order Archive.

Check more features of this component and their configuration in this guide.

Order Status

Provide the ultimate order processing transparency with the additional order statuses. Create,

manage and apply customer order statuses and quickly notify customers about changes.

- Create and modify order statuses
- Add order statuses to order states
- Sort order by their custom statuses on the grid
- Notify customers on order status changes
- Set individual email templates per order status and store view

To configure the module, please, go to **Stores → Configuration → Amasty Extensions → Order Status** and expand the **General Settings** section.

General Settings

Hide order state	Yes ▼

If set to `No`, custom order status will be shown as `State: Custom Status`

See other options and configurations in this manual.

Order Notes

Create order notes and mark them with colored flags. Simplify your order management process in times by making important comments noticeable.

- Add important notes and process orders efficiently
- Organize and prioritize orders
- Mark orders with flags or badges to recognize a priority at a glance
- Automatically add labels to orders based on their order status
- Apply notes and labels in bulk

Existing order flags can be seen in the **Sales → Order Notes → Flags**.

Order Flags

28 icons are supplied with the extension. Feel free to replace them and/or add new once.

See the detailed configuration guide here.

Order Management Suite Pro

Pro version includes all the extensions of Lite package but has additional components.

Order Attributes

Add an unlimited number of extra fields to your checkout page to easily collect and process additional order-related data. Display all created order attributes on a handy backend grid to keep necessary information at hand.

- Create order attributes of different types
- Use flexible conditions for attribute fields display
- Show additional attributes info on the order grid

- Add custom attributes to emails and PDF documents
- Show extra attributes depending on a selected shipping method

Thanks to flexible settings and an intuitive interface, the Order Attributes extension will help you easily fine-tune the checkout page according to your requirements. Create as many additional order attributes as you need. Add custom field input types to orders and quickly process collected data on the backend.

To configure the basic extension settings, please go to **Stores → Configuration → Amasty Extensions → Order Attributes**.

Checkout Settings

Display Attribute Values in the Order Summary [store view]	Yes ▼ Filled in order attributes will be displayed in the order summary section at the payment checkout step.
Date Format [store view]	yyyy-mm-dd (2020-05-25) ▼ Format of date for outputting values
Time Format [store view]	24-hour format ▼
Include Order Attributes into Emails [store view]	Yes ▼
Send Attributes on Shipping Step [store view]	Yes ▼ Set `No` to prevent validation on Shipping Step (One Step Checkout better compatibility)
Newsletter Subscription [global]	subscribe_box Set an attribute code of order attribute (Yes/No or Checkbox)

Explore the detailed configuration guide for this extension here.

Custom Order Number

Implement diverse store documents numbering using prefixes and custom starting numbers. Provide unique order and other related document numbers to protect business data and motivate customers to purchase more.

- Use custom order numbers for order-related documentation
- Add prefixes and postfixes to modify order numbering
- Fit your numbering policy to local jurisdiction requirements
- Hide important business data with the help of increment intervals

To configure the extension, please go to **Store → Configuration → Amasty Extensions → Order Number**.

To configure order numbering expand the **Order** section.

Order

Number Format
[store view]

ORD-{yy}-{mm}-{dd}-{counter}

You can use variables {counter}, {store}, {yyyy}, {yy}, {m}, {mm}, {d}, {dd}, {rand}, {country_code}. If you type ORD-{yy}-{mm}-{dd}-{counter} in the field, you will have order numbers of the kind: ORD-13-08-15-000077

Start Counter From
[store view]

18

Counter Increment Step
[store view]

3

E.g. the last number is 00015. If increment step is 4, the next number will be 00019

Counter Padding
[store view]

7

Total number of digits in the order number. If the order id is 24 and padding is 6, the result will be 000024. Set to 0 (zero) not to add leading zeros.

Reset Counter on Date Change
[store view]

Never

Never
Each Day
Each Month
Each Year

Reset Order Counter
[global]

Reset

Learn about the configuration in this guide.
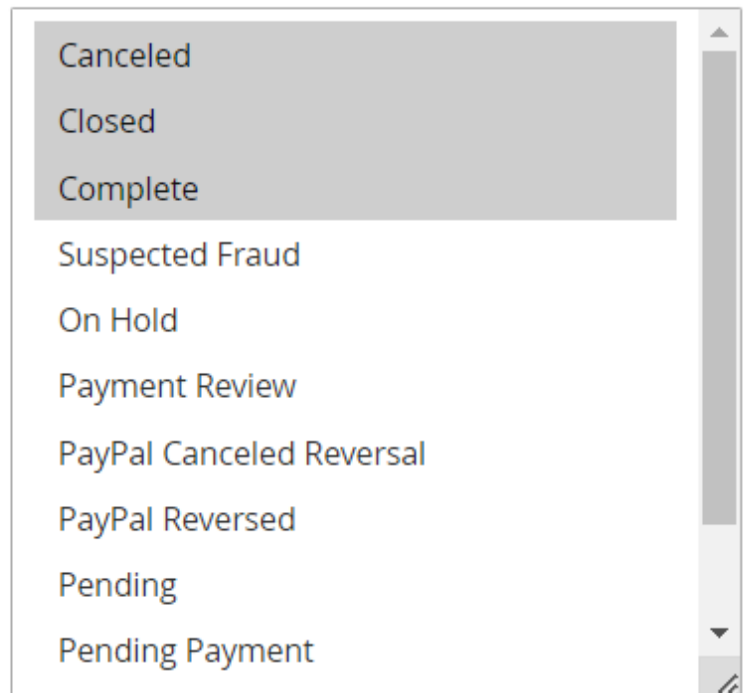
Extended Order Grid

Extend the functionality of your order grid. Add extra columns to the grid for customers, products, shipping or billing attributes and get relevant order information right from the grid.

- Manage the default columns and add the new ones
- Filter orders by any custom attribute
- Search for particular orders by customer group, phone or email
- Display product images on the grid
- Show shipping and payment information

To configure general extension settings, please go to **Stores → Configuration → Amasty Extensions → Order Grid**.

General

Hide orders with statuses [global]	Canceled
	Closed
	Complete
	Suspected Fraud
	On Hold
	Payment Review
	PayPal Canceled Reversal
	PayPal Reversed
	Pending
	Pending Payment

| Product Image [global] | Product Thumbnail Itself |

Find out how to work with the grid here.
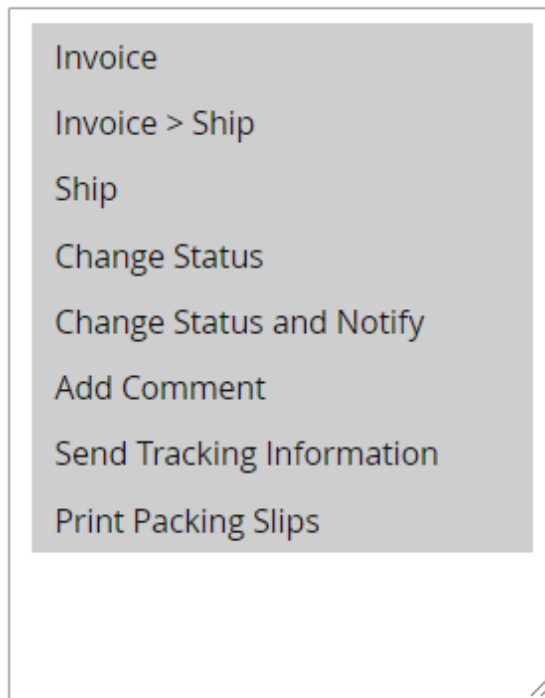
Mass Order Actions

Add new functionality to the default order grid. Save times on routine actions like sending invoices, submitting shipments and editing tracking numbers by doing that right on the grid.

- Ship orders right from the order grid
- Create invoices and edit tracking numbers on the grid
- Quickly modify order statuses
- Apply actions to multiple orders
- Utilize combinations of actions

To configure the general extension settings, please go to **Stores → Configuration → Amasty Extensions → Mass Order Actions** and expand the General section.

Check the details in this user guide.

Order Management Suite Premium

Premium version includes not only all extensions of Lite and Pro versions, but also the solution for data transferring.

Export Orders

Connect your Magento instance to other systems and efficiently export orders to them. Add to export file any order data, fields from 3rd-party extensions, create order export profiles and migrate orders regularly.

- Build export profiles in 6 various formats
- Easily find any order entity and add it to the export file
- Change the names of columns in a file to meet the recipient requirements
- Execute profiles by schedule, event or manually
- Use filtering to add only relevant order data to the export file
- Check extended options with the 2 extra Amasty Export modules

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

General Settings

Enable module [global]	Yes
Export Batch Size [global]	500
	The number of orders that will be processed in an iteration.
Log Auto-Cleaning [global]	Yes
Log Auto-Cleaning Period (Days) [global]	90
Export Files Auto-Cleaning [global]	Yes
Export Files Auto-Cleaning Period (Days) [global]	5

See how to configure export profiles here.

Import Orders

Upload orders placed on third-party sources, marketplaces and other online stores into your store. Set a two-way integration across all platforms.

- Import order data from the third-party platforms, marketplaces, Magento and non-Magento online stores
- Avoid database errors and data losses with file validation
- Create unique import profiles suitable for specific platforms

- Execute import profiles manually or by cron
- Import huge volumes of orders (up to 500.000)
- Complete various business tasks with the 2 extra Amasty Import interfaces

To create import profiles, navigate to **System → Import Orders → Profiles**.

Import Profiles

Add New Profile

Filters   Default View ▾   Columns ▾

Actions ▾   3 records found   20 ▾ per page   ‹   1   of 1   ›

	Profile ID ↓	Profile Name	File Format	Execution Type	Last Run	Last Update	Action
☐	1	eBay	XML	Manual	Mar 25, 2021 3:58:14 PM	Mar 26, 2021 9:16:00 AM	Edit
☐	2	Amazon	CSV	Cron	Mar 25, 2021 1:18:32 PM	Mar 25, 2021 1:43:50 PM	Edit
☐	4	Magento instance	XLSX	Cron	Mar 26, 2021 9:23:27 AM	Mar 26, 2021 9:24:30 AM	Edit

Explore a detailed configuration guide here.

Find out how to install the **Order Management Suite** for Magento 2 via Composer.

From:
https://amasty.com/docs/ - **Amasty Extensions FAQ**

Permanent link:
https://amasty.com/docs/doku.php?id=magento_2:order_management_suite

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