

amasty

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. By now, only **Pro** version is available for purchase, but soon 2 other packages will be ready for release.

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.

Cancel Orders 1.0.0 by **amasty**

i 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.

General Settings

Enable Orders Archive [store view]

Hide Archived Orders on Frontend [global]

Archive Orders Older Than [global]
Days

Order Status To Apply To [global]

Pending
Processing
Suspected Fraud
Complete
Closed
Canceled
On Hold

Archive Frequency [global]
Hourly
Two Times Per Day
Daily
Weekly
Monthly

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




demouser ▾

Add New Flag

Filters Default View Columns

21 records found

20 per page 1 of 2

Icon	Priority ↓	Name	Note	Auto Apply on Order Status	Auto Apply on Order Shipping Method	Auto Apply on Order Payment Method	Action
	1	High priority	Immediate action is required				Edit
	2	Medium priority	Requires fast processing				Edit
	3	Need details	Details from a customer are required	On Hold			Edit
	4	Delayed delivery	An order should be delayed later				Edit
	10	Cancelled	Order is canceled	Canceled			Edit
	20	Processing	Order is processing	Processing			Edit
	30	Complete	Order is complete	Complete			Edit

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 <small>[store view]</small>	<input type="text" value="Yes"/>	▼
	Filled in order attributes will be displayed in the order summary section at the payment checkout step.	
Date Format <small>[store view]</small>	<input type="text" value="yyyy-mm-dd (2020-05-25)"/>	▼
	Format of date for outputting values	
Time Format <small>[store view]</small>	<input type="text" value="24-hour format"/>	▼
Include Order Attributes into Emails <small>[store view]</small>	<input type="text" value="Yes"/>	▼
Send Attributes on Shipping Step <small>[store view]</small>	<input type="text" value="Yes"/>	▼
	Set `No` to prevent validation on Shipping Step (One Step Checkout better compatibility)	
Newsletter Subscription <small>[global]</small>	<input type="text" value="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 <small>[store view]</small>	<input type="text" value="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 <small>[store view]</small>	<input type="text" value="18"/> 
Counter Increment Step <small>[store view]</small>	<input type="text" value="3"/>
	E.g. the last number is 00015. If increment step is 4, the next number will be 00019
Counter Padding <small>[store view]</small>	<input type="text" value="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 <small>[store view]</small>	<div><input type="text" value="Never"/> ▼ Never Each Day Each Month Each Year</div>
Reset Order Counter <small>[global]</small>	<input type="button" value="Reset"/>

Learn about the configuration [in this guide](#).

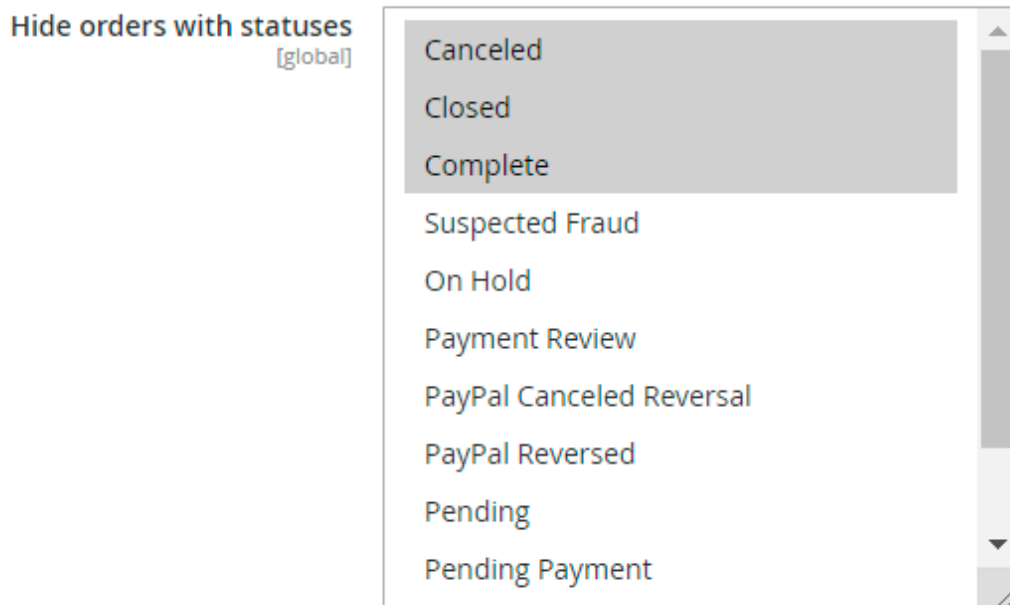
Extended Order Grid

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



Find out how to work with the grid [here](#).

Mass Order Actions

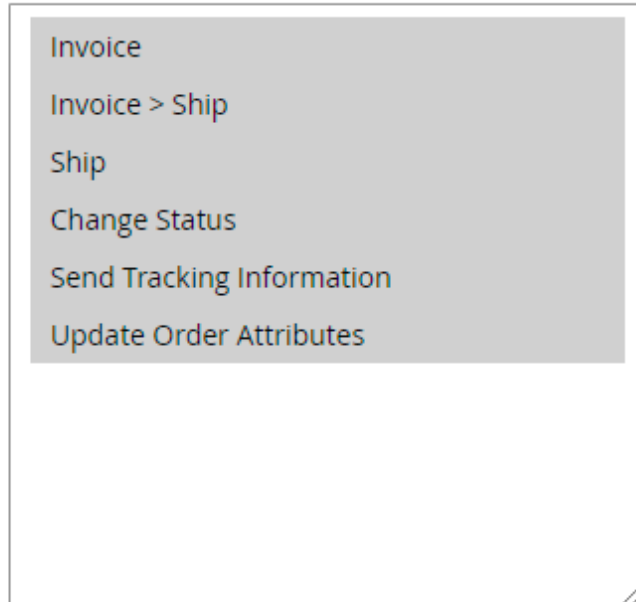
Add new functionality to the default order grid. Save times on routine actions like sending invoices, submitting shipments and editing tracking numbers by doing that right on the grid.

- 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.

General

Enabled Actions [global]



Press CTRL+ left mouse button to select multiple values.
To use "Update Order Attributes" action please install Amasty Order Attributes extension v2.2.0 or higher

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 <small>[global]</small>	<input type="text" value="Yes"/>		
Export Batch Size <small>[global]</small>	<input type="text" value="500"/>		The number of orders that will be processed in an iteration.
Log Auto-Cleaning <small>[global]</small>	<input type="text" value="Yes"/>		
Log Auto-Cleaning Period (Days) <small>[global]</small>	<input type="text" value="90"/>		
Export Files Auto-Cleaning <small>[global]</small>	<input type="text" value="Yes"/>		
Export Files Auto-Cleaning Period (Days) <small>[global]</small>	<input type="text" value="5"/>		

See how to configure export profiles [here](#).

COMING SOON: We are planning to also include [Import Orders](#) extension for two-side integrations.

Find out how to install the **Order Management Suite** for Magento 2 via [Composer](#).

From:
<https://stg.amasty.net/docs/> - **Amasty Extensions FAQ**

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

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