



SOFTWARESILOS

Sales Staff Extension

PDF Manual

MODULE

staff

LAST UPDATED

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Commission System

Sales Staff Extension · </staff/features/commission-system>

Learn how the automatic commission calculation and tracking system works for sales staff.

Overview

The Commission System:

- Calculates commissions automatically on orders
- Supports multiple calculation methods
- Tracks earnings per staff member
- Stores commission data with orders
- Provides reporting and analytics

Commission Types

1. Total Excluding Tax

Configuration: Commission type = "Total excluding tax"

Calculation: Based on order subtotal (before tax and shipping)

Formula:

$$\text{Commission} = (\text{Order Subtotal} \times \text{Commission \%}) / 100$$

Example:

```
Order Subtotal: $1,000.00
Tax: $80.00
Shipping: $20.00
Grand Total: $1,100.00

Staff Commission: 5%
Commission Amount: $1,000.00 × 5% = $50.00
```

Use Case: Standard B2B sales, wholesale

2. Total Including Tax

Configuration: Commission type = "Total including tax"

Calculation: Based on subtotal including tax (before shipping)

Formula:

$$\text{Commission} = (\text{Subtotal Incl. Tax} \times \text{Commission \%}) / 100$$

Example:

```
Order Subtotal: $1,000.00
Tax: $80.00
Subtotal Incl. Tax: $1,080.00
Shipping: $20.00
Grand Total: $1,100.00

Staff Commission: 5%
Commission Amount: $1,080.00 × 5% = $54.00
```

Use Case: Retail sales, B2C operations

3. Product Discount

Configuration: Commission type = "Product discount"

Calculation: Based on discount amount given

Formula:

```
Commission = Sum of all product discounts
```

Example:

```
Product A: Original $100, Sold $90, Discount $10
Product B: Original $200, Sold $180, Discount $20
Product C: Original $50, Sold $50, Discount $0

Total Discount: $30
Commission Amount: $30.00
```

Use Case: Incentivize discounting, promotional sales

Commission Configuration

Per-Staff Commission Rate

Location: Staff > All Staff > Edit Staff

Field: Commission

Examples:

- Junior Sales: 3.0%
- Senior Sales: 5.0%
- Territory Manager: 7.5%
- VP Sales: 10.0%

Flexibility: Each staff member can have different rate

System-Wide Settings

Location: Stores > Configuration > MageB2B > Staff > Commission

Settings:

- **Commission type:** Select calculation method
- **Show commission for Staff:** Display in staff dashboard

Commission Calculation Process

When Order is Placed

Step 1: Order created

- Staff ID captured from session
- Or from customer's primary staff (if configured)

Step 2: Commission calculated

- Based on commission type
- Using staff's commission percentage
- Rounded to 2 decimal places

Step 3: Commission stored

- Commission value stored with the order
- Visible in admin order view
- Included in order comments

Step 4: Staff notified (optional)

- Email with commission details
- Dashboard updated
- Order appears in "My Orders"

```
flowchart TD
    A[Order placed] --> B[Determine staff]
    B --> C[Compute base amount]
    C --> D[Apply commission percent]
    D --> E[Store commission on order]
    E --> F[Visible in Staff My Orders and Admin Order View]
```

Order Status Changes

Canceled Orders:

- Commission set to \$0.00
- Previous commission removed
- Staff dashboard updated

Refunds / Credit Memos:

The core Staff module stores a single commission amount on the order. It does not automatically

recalculate commission on refunds/credit memos.

Viewing Commissions

Staff Dashboard (Frontend)

Location: Staff Account > My Account

Displays:

- Your current commission rate (percentage)

Example:

Field	Value
My current commission	5%

Staff Orders (Frontend)

Location: Staff Account > My Orders

Each order row shows the commission amount stored on the order.

Admin Order View

Location: Sales > Orders > View Order

Fields:

- **Sales Staff:** Staff name
- **Sales Staff Group:** Group name
- **Sales Staff Commission:** Commission amount

Order Comments:

Sales Staff John Smith earned a commission of \$50.00.

Admin Reports

Built into the core Staff feature set.

Available Reports:

- Commission by staff member
- Commission by staff group
- Commission by time period
- Commission by product
- Commission by customer

Commission Scenarios

Scenario 1: Standard Order

Setup:

- Staff: John Smith
- Commission: 5%
- Commission Type: Total excluding tax

Order:

```
Product A: $500.00
Product B: $300.00
Subtotal: $800.00
Tax (8%): $64.00
Shipping: $20.00
Grand Total: $884.00
```

Commission:

```
$800.00 × 5% = $40.00
```

Scenario 2: Discounted Order

Setup:

- Staff: Sarah Johnson
- Commission: 7%
- Commission Type: Total excluding tax

Order:

```
Product A: $1,000.00
Coupon Discount: -$100.00
Subtotal: $900.00
Tax (8%): $72.00
Shipping: $25.00
Grand Total: $997.00
```

Commission:

```
$900.00 × 7% = $63.00
```

Scenario 3: Multiple Products with Price Edits

Setup:

- Staff: Mike Davis
- Commission: 5%
- Commission Type: Product discount

Order:

```
Product A: Original $200, Sold $180 (Discount $20)
Product B: Original $150, Sold $140 (Discount $10)
Product C: Original $100, Sold $100 (Discount $0)
Total Discount: $30
```

Commission:

```
$30.00 (sum of discounts)
```

Scenario 4: Customer Service (No Commission)

Setup:

- Staff: Lisa Anderson (Customer Service)
- Commission: 0%
- Commission Type: Total excluding tax

Order:

```
Subtotal: $500.00
Tax: $40.00
Shipping: $15.00
Grand Total: $555.00
```

Commission:

```
$500.00 × 0% = $0.00
```

Advanced Configuration

Permanent Staff Assignment

Configuration: Stores > Configuration > MageB2B > Staff > General

- **Set staff permanently on order:** Yes

Behavior:

- Order assigned to customer's primary staff
- Even if different staff places order
- Even if customer places order directly

Use Case: Ensure primary staff always gets commission

Example:

```
Customer: Acme Corp
Primary Staff: John Smith (5% commission)
Order placed by: Customer directly
```

Result: Order assigned to John Smith, \$50 commission

Email Copy to Staff

Configuration: Stores > Configuration > MageB2B > Staff > Email

- **Sent email copy to staff when customer is placing an order:** Yes

Requires: "Set staff permanently on order" = Yes

Behavior:

- Staff receives order confirmation email
- Includes commission information
- Even when customer orders directly

Commission Adjustments

Manual Override (Admin Order Create)

When creating an order in the Magento Admin, you can optionally enter a commission override for the order.

Use Cases:

- Correction of calculation errors
- Special bonuses
- Commission disputes
- Retroactive rate changes

Reassign Staff

Process:

1. Go to Sales > Orders
2. Select orders (checkboxes)
3. Actions > Reassign Sales Staff
4. Select new staff member
5. Submit

Result:

- Staff ID updated
- Existing commission remains unchanged by the reassignment action

Commission Reports

Reports Availability

The core module stores commission values on orders and provides reporting screens in Staff > Reports.

- Total commission earned
- Average commission per order

Advanced Reports

Built into core mageb2b/staff.

Report Types:

1. Commission by Period

- Daily, weekly, monthly, yearly
- Compare periods
- Trend analysis

2. Commission by Staff

- Ranking by commission
- Performance comparison
- Goal tracking

3. Commission by Product

- Which products generate most commission
- Product performance analysis
- Inventory planning

4. Commission by Customer

- High-value customers
- Customer profitability
- Account prioritization

Export Options

Formats:

- CSV
- Excel
- PDF

Use Cases:

- Payroll processing
- Accounting integration
- Performance reviews
- Tax reporting

Best Practices

Commission Structure

Tiered Commissions:

Junior Sales: 3%
Sales Rep: 5%
Senior Sales: 7%
Territory Manager: 10%

Product-Based:

Standard Products: 5%
High-Margin Products: 7%
New Products: 10%
Clearance: 2%

Volume-Based:

\$0 - \$10,000/month: 5%
\$10,001 - \$25,000/month: 6%
\$25,001 - \$50,000/month: 7%
\$50,001+/month: 8%

Transparency

Recommendations:

- Show commission in staff dashboard
- Provide detailed breakdowns
- Explain calculation method
- Regular commission statements

Accuracy

Ensure:

- Correct commission type selected
- Staff rates up to date
- Order status handling defined
- Refund policy documented

Performance Tracking

Monitor:

- Commission trends
- Top performers
- Underperformers
- Goal achievement

Troubleshooting

Commission Not Calculated

Check:

1. Staff Commission is set (not 0%)
2. Commission type is configured
3. Order is not canceled

4. Staff was assigned to order

Solution: Edit staff, set Commission, save

Wrong Commission Amount

Check:

1. Commission type (excl/incl tax, discount)
2. Staff commission percentage
3. Order totals (subtotal, tax, shipping)
4. Discount calculations

Solution: Verify configuration, manually adjust if needed

Commission Shows \$0.00

Possible Reasons:

1. Staff commission rate is 0%
2. Order was canceled
3. Commission type is "Product discount" but no discounts given
4. Calculation error

Solution: Check staff settings and order details

Staff Cannot See Commission

Check:

1. Configuration: "Show commission for Staff" = Yes
2. Staff is logged in
3. Staff has placed orders
4. Orders are not all canceled

Solution: Enable commission display in configuration

Next Steps

Learn about staff groups and organization:

[Staff Groups →](#)