



SOFTWARESILOS

Sales Staff Extension

PDF Manual

MODULE

staff

LAST UPDATED

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Order Management

Sales Staff Extension · /staff/features/order-management

Learn how staff orders are tracked, managed, and reported in the system.

Overview

The Order Management system:

- Automatically tags orders with staff information
- Tracks commission per order
- Enables order filtering by staff
- Provides order history per staff
- Supports order reassignment

Automatic Order Tagging

Order Fields

Added to Every Order:

- Staff member assignment
- Staff group assignment
- Commission amount

Visible In:

- Admin order view
- Order grid
- Order reports
- Order API

When Orders Are Tagged

Scenario 1: Staff Places Order

- Staff logs into customer account
- Places order
- Order automatically tagged with staff ID

Scenario 2: Customer Places Order

- Customer orders directly
- If "Set staff permanently on order" = Yes
- Order tagged with customer's primary staff

Scenario 3: Admin Places Order

- Admin can select staff member
- Order tagged with selected staff

View Staff Orders

Frontend (Staff Dashboard)

Location: Staff Account > My Orders

Display:

- Order number
- Customer name
- Order date
- Order total
- Commission earned
- Order status

There is no dedicated frontend filter panel on the My Orders page in the current implementation.

Admin (Order Grid)

Location: Sales > Orders

Staff Column (if enabled):

- Shows staff name
- Filterable
- Sortable

Enable: Configuration > Admin Settings > Add Sales Staff to Order Grid = Yes

Order Details

Staff Information Section

In Order View:

```
Sales Staff Information
├─ Staff Member: John Smith
├─ Staff Group: Territory North
├─ Commission: $50.00
└─ Commission Rate: 5%
```

Order Comments

Automatic Comment:

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

Added When: Order is placed

Order Reassignment

Enable Feature

Configuration: Stores > Configuration > MageB2B > Staff > Admin Settings

Setting: Add Reassign feature for Sales Staff to Order Grid = Yes

Reassign Process

Steps:

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

What Happens:

- Staff assignment updated
- Staff group assignment updated
- Existing commission stays as-is (the reassignment action does not recalculate it)

Use Cases:

- Staff member leaves
- Territory changes
- Workload balancing
- Error correction

Bulk Reassignment

Scenario: Reassign all orders from Staff A to Staff B

Process:

1. Filter orders by Staff A
2. Select all orders
3. Reassign to Staff B
4. Confirm

Result: All orders transferred

Commission Tracking

Per Order

View Commission:

- Order detail page
- Order grid (if column added)
- Staff dashboard
- Commission reports

Admin Order Create (Optional)

When creating an order from the Magento Admin (Sales > Orders > Create New Order), you can optionally set:

- Sales staff
- Sales staff commission (manual override)

This is mainly useful for phone/manual orders created by your back office team.

Order Filtering

By Staff Member

Admin:

1. Go to Sales > Orders
2. Filter by "Sales Staff"
3. Select staff member
4. Apply filter

Staff Dashboard:

- Automatically filtered to own orders
- Can filter by customer, date, status

By Staff Group

The admin sales order grid provides a **Sales Staff** column/filter in this module. Direct filtering by **Sales Staff Group** is not available by default.

By Date Range

Common Filters:

- Today
- This week
- This month
- This quarter
- This year
- Custom range

Order Statistics

Staff Dashboard

Metrics:

- Total orders
- Orders this month
- Total sales
- Average order value
- Commission earned

- Pending orders

Charts:

- Orders over time
- Sales trend
- Commission trend
- Top customers

Admin Reports

Built into the core Staff feature set.

Location (Admin): Staff > Reports > Orders / Products

Available Reports:

- Orders by staff
- Orders by group
- Orders by period
- Commission by order
- Average order value

Email Notifications

Order Confirmation to Staff

Configuration: Stores > Configuration > MageB2B > Staff > Email

Settings:

- **Email order to:** Customer, Staff, Customer and Staff, Customer from quote and Staff, or Staff from quote and Customer
- **Sent email copy to staff when customer is placing an order:** Yes/No

Email Contains:

- Order details
- Customer information
- Commission amount
- Order total

Order Status Updates

Magento's core order status emails are controlled by Magento's Sales Email configuration and your email templates. The Staff extension can additionally send staff copies depending on your **Email order to** and **Sent email copy to staff...** configuration.

Order Export

Export Staff Orders

There is no built-in export control on the frontend **My Orders** page in the current implementation.

From Admin:

1. Filter orders by staff
2. Select orders
3. Actions > Export
4. Choose format

Use Cases:

- Commission calculation
- Performance review
- Accounting
- Tax reporting

Integration

Accounting Software

Sync Orders:

- QuickBooks
- Xero
- Sage
- FreshBooks

Data Synced:

- Order totals
- Commission amounts
- Staff information
- Customer data

ERP Systems

ERP integrations are typically implemented via middleware or custom Magento integrations. Common data points:

- order details
- staff assignment
- commission amount

Best Practices

Order Tracking

Ensure:

- All orders tagged with staff
- Commission calculated correctly
- Order status updated
- Staff notified

Commission Management

Process:

- Review commission calculations periodically
- Align commission payout rules with your internal accounting process

Performance Monitoring

Track:

- Orders per staff
- Sales per staff
- Commission per staff
- Conversion rates
- Average order value

Troubleshooting

Order Not Tagged with Staff

Check:

1. Staff was logged in during order
2. Customer impersonation was active
3. "Set staff permanently on order" setting
4. Staff information visible in order details

Commission Not Calculated

Check:

1. Staff commission rate set
2. Commission type configured
3. Order not canceled
4. Calculation method correct

Cannot Reassign Orders

Check:

1. Reassign feature enabled
2. Admin permissions
3. Orders selected
4. Staff member exists

Next Steps

- [Commission System](#) →
- [Reports](#) →
- [Staff Groups](#) →