Sales Reports

Sales Staff Documentation

Guide for Magento administrators, technical project owners, and implementation teams.

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EXTENSION
Magento 2 Extension Sales Staff

Sales Reports

Order and product reports are included in the Sales Staff base extension. There is no separate Reports add-on to install.

What is available

Magento Admin provides separate Staff order and product report pages. Authorized representatives can also open **Order sales report** and **Product sales report** from their Staff account when frontend reporting is enabled.

The order report ties Magento orders to the responsible representative and includes the stored Staff commission. The product report summarizes products sold through Staff-attributed orders. Both Admin reports have CSV export actions; the Staff frontend reports can also export CSV.

Use the reports to answer specific operational questions, such as which orders belong to a representative, which products they sold, or which commission value was stored when an order was placed. They are not a general CRM forecasting system and do not infer activity that was never attributed to Staff.

Enable frontend reports

Go to **Stores > Configuration > MageB2B > Staff > Report settings** and set **Show sales report for staff in frontend** to **Yes**. It is enabled by default.

If the links are hidden, the Admin reports can still be available to an authorized Magento administrator.

Admin permissions

Grant only the report resources a role needs:

- **Reports for staff**
- **Order report for staff**
- **Product report for staff**

The two child permissions protect their matching page and CSV export. A user who needs order reporting does not automatically need permission to edit Staff accounts.

Attribution and commission caveats

Reports depend on `sales_staff_id`, `sales_staff_group_id` and `sales_staff_commission` stored with the order. An order without Staff attribution will not become a Staff order merely because the customer is currently assigned to a representative.

If **Set staff permanently on order** is enabled, the customer's primary representative

may be written to the order even when the representative did not personally place it. Decide whether that rule matches the way your business interprets ownership before comparing individual performance.

Commission is stored on the order. Changing the representative's percentage later does not necessarily rewrite historical order data, which is useful for auditability but important when reconciling reports.

When numbers look wrong

1. Open a sample order and confirm its Staff ID, group and commission were saved.
2. Check whether the order was created in Staff context or attributed through the permanent-assignment setting.
3. Compare the report period and store scope with the order date and website.
4. Confirm the Admin role has the correct report permission.
5. Export the same report to CSV and compare the underlying rows before treating a display total as a data problem.

Related: Commission System, Order Management and Customer Assignment.