



SOFTWARESILOS

Sales Staff Extension

PDF Manual

MODULE

staff

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Staff Groups

Sales Staff Extension · /staff/features/staff-groups

Learn how to organize your sales team using staff groups for better management and reporting.

Overview

Staff Groups are a simple way to categorize staff accounts (for example by territory or team). A staff group name is stored on staff accounts and carried into staff-related order context for reporting.

Use Staff Groups to:

- Organize staff by territory, department, or function
- Filter staff in Admin lists and reports
- Group orders by staff team (especially useful with Staff > Reports screens)
- Use a stable group id for integrations (for example SAML mapping)

Create Staff Group

Navigate to Groups

Location: Staff > Staff Groups (Admin)

Add New Group

1. Click **Add New**
2. Enter **Name:** e.g., "Territory North"
3. Click **Save**

Group Names Examples:

- Territory North
- Territory South
- Inside Sales
- Field Sales
- Customer Service
- VIP Account Managers
- Product Specialists

Assign Staff to Groups

During Staff Creation

1. Create new staff account
2. Select **Staff Group** from dropdown
3. Save staff account

Edit Existing Staff Account

1. Edit staff account
2. Change **Staff Group**

3. Save

Note: A staff account can only belong to one group at a time.

Default Staff Group

Configure Default

Location: Stores > Configuration > MageB2B > Staff > General

Setting: Default Staff Group

Behavior:

- New staff automatically assigned to default group
- Can be changed during creation
- Can be changed later

Use Case: Assign all new staff to "General" group initially

How Groups Are Used (In Practice)

Orders: Group Context

When an order is assigned to a staff account, the system also stores staff group context on the order. This allows:

- grouping/analysis in reporting tools

Integrations (Example: SAML)

Some add-ons (like SAML) can use group ids as stable identifiers for mapping "roles" to staff attributes.

Reporting

Group Reports:

- Sales by group
- Commission by group
- Orders by group
- Customer distribution by group
- Performance comparison

Tip: Reporting screens are available in core (Admin: Staff > Reports).

Use Cases

Geographic Territories

Structure:

└ Territory North

```
|
| | Staff 1
| | Staff 2
| | Staff 3
| | Territory South
| | | Staff 4
| | | Staff 5
| | Territory West
| | | Staff 6
| | | Staff 7
```

Benefits:

- Clear territory ownership
- Regional performance tracking
- Territory-based goals
- Resource allocation

Functional Teams

Structure:

```
| | Inside Sales
| | | Phone Sales Rep 1
| | | Phone Sales Rep 2
| | | Email Sales Rep
| | Field Sales
| | | Field Rep 1
| | | Field Rep 2
| | Customer Service
| | | Support Rep 1
| | | Support Rep 2
```

Benefits:

- Role-based organization
- Function-specific metrics
- Skill-based assignment
- Training coordination

Product Lines

Structure:

```
| | Electronics Team
| | | Electronics Specialist 1
| | | Electronics Specialist 2
| | Furniture Team
| | | Furniture Specialist 1
| | | Furniture Specialist 2
| | Clothing Team
| | | Clothing Specialist
```

Benefits:

- Product expertise
- Category performance
- Specialized training
- Inventory planning

Hierarchical Structure

Structure:

```
├─ Senior Sales (Managers)
│   ├── Territory Manager North
│   └── Territory Manager South
├─ Mid-Level Sales
│   ├── Senior Rep 1
│   ├── Senior Rep 2
│   └── Senior Rep 3
└─ Junior Sales
    ├── Junior Rep 1
    ├── Junior Rep 2
    └── Junior Rep 3
```

Benefits:

- Career progression
- Mentorship structure
- Tiered commission
- Skill development

Group Management

Rename Group

1. Go to Staff Groups
2. Edit group
3. Change name
4. Save

Effect: All staff remain in the same group (only the name changes).

Delete Group

Groups can be deleted; related staff rows follow the configured database relation behavior.

Recommendation:

1. Reassign staff to another group first
2. Then delete the group if it is no longer needed

Best Practices

Group Structure

Keep It Simple:

- 3-7 groups ideal
- Clear naming
- Logical organization
- Easy to understand

Avoid:

- Too many groups (>10)
- Overlapping groups
- Confusing names
- Frequent changes

Group Assignment

Criteria:

- Geographic location
- Product expertise
- Experience level
- Customer type
- Sales channel

Documentation:

- Document group purpose
- Define assignment criteria
- Communicate changes
- Regular reviews

Performance Tracking

Set Goals:

- Group sales targets
- Commission goals
- Customer acquisition targets
- Activity goals

Monitor:

- Weekly progress
- Monthly reviews
- Quarterly analysis
- Annual planning

Integration

CRM Integration

Sync Groups:

- Map Magento groups to CRM teams
- Sync group assignments
- Share performance data

ERP Integration

If you sync staff groups to an external system, you typically use the group name/id as a stable reference (for example for cost center mapping).

Troubleshooting

Cannot Delete Group

Cause: Delete operation failed (for example due to custom business constraints or data/state issues)

Solution:

1. Check if staff currently reference the group
2. Reassign staff if needed
3. Retry delete and review logs on failure

Staff Not in Correct Group

Check:

1. Staff account group assignment
2. Recent changes
3. Default group setting

Solution: Edit staff, change group, save

Orders Not Tagged with Group

Check:

1. Staff has group assigned
2. Order placed after group assignment
3. Staff group information is visible in order data/reporting

Solution: Verify staff group, check order data

Next Steps

- [Order Management](#) →
- [Commission System](#) →
- [Reports](#) →