Sales Staff Extension

PDF Manual

MODULE

staff

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First Staff

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This guide walks you through creating and configuring your first sales staff account.

Prerequisites

- Extension installed and configured
- At least one staff group created
- Email templates configured

Step 1: Create Staff Group

Before creating staff, create a group:

Navigate to Staff Groups

Go to: **Staff > Staff Groups**

Add New Group

Click **Add New**

Fill in:

- **Name**: Sales Representatives
- Click **Save**

You can create multiple groups:

- Sales Representatives
- Field Sales
- Inside Sales
- Customer Service
- Territory North
- Territory South

Step 2: Create Staff Account

Navigate to Staff Management

Go to: **Staff > All Staff**

Add New Staff

Click **Add New**

Fill Basic Information

Account Information:

- **First Name**: John
- **Last Name**: Smith
- **Email**: john.smith@example.com
- **Password**: Set secure password per your configured minimum length (default: 8)
- **Phone**: +1 555-0123
- **Status**: Active
- **Website**: Select website

Group & Permissions:

- **Staff Group**: Sales Representatives
- **Access All Customers**: No (assign specific customers)
- **Can Edit Item Price**: Yes (allow price adjustments)
- **Can Create Customer**: Yes (allow customer creation)

Commission:

- **Commission**: 5.00 (5% commission)

Profile Image (optional):

- Upload professional photo
- Recommended: 200x200px minimum

Save Staff Account

Click **Save**

The staff member will receive a "New Account" email with login instructions (if the corresponding email template is activated).

Step 3: Assign Customers

Option A: Assign from Staff Edit Page

1. Edit the staff account
2. Use the **Customers** grid section
3. Select customers using checkboxes
4. Save staff account

Option B: Assign from Customer Edit Page

1. Go to **Customers > All Customers**
2. Edit a customer
3. Set **Primary Staff**
4. Save customer

Option C: Mass Assignment

1. Go to **Customers > All Customers**
2. Select multiple customers (checkboxes)
3. **Actions** > **Assign Primary Sales Staff**
4. Select staff member
5. Click **Submit**

Step 4: Test Staff Login

Frontend Login URL

Staff login page: `https://yourstore.com/staff/account/login`

Or use footer link if enabled.

Login Credentials

- **Email**: john.smith@example.com
- **Password**: (password you set)

After Login

Staff should see:

- **Dashboard**: Overview with statistics
- **My Account**: Profile/account details
- **Customers**: List of assigned customers
- **My Orders**: Orders placed by this staff

Optional items depend on configuration (for example commission visibility).

Step 5: Test Customer Impersonation

From Staff Dashboard

1. Go to **Customers**
2. Find a customer
3. Use the customer login action (tooltip: **Login to this account**)
4. You're now logged into the customer account

Place Test Order

1. Add products to cart
2. Proceed to checkout
3. Complete order
4. Order is automatically assigned to staff
5. Commission is calculated

Exit Customer Context

Use the header menu: **My Staff Account** or **Logout from current customer**.

Step 6: Verify Commission

Check Order

1. Go to **Sales > Orders** (admin)
2. Open the test order
3. Verify **Sales Staff** field shows: John Smith

4. Verify commission via order comment/history entry

Check Staff Dashboard

1. Login as staff (frontend)
2. Open **My Account**
3. Verify commission is displayed there (if enabled in configuration)
4. Check order appears in **My Orders**

Common Scenarios

Scenario 1: Field Sales Representative

Configuration:

```
First Name: Sarah
Last Name: Johnson
Email: sarah.johnson@example.com
Staff Group: Field Sales
Access All Customers: No
Can Edit Item Price: Yes
Can Create Customer: Yes
Commission: 7.5%
```

Assigned Customers: 50 customers in Territory North

Use Case: Sarah visits customers on-site, creates new accounts, places orders with custom pricing.

Scenario 2: Inside Sales Agent

Configuration:

```
First Name: Mike
Last Name: Davis
Email: mike.davis@example.com
Staff Group: Inside Sales
Access All Customers: Yes
Can Edit Item Price: Yes
Can Create Customer: Yes
Commission: 3.0%
```

Assigned Customers: All customers (access_all_customers = Yes)

Use Case: Mike handles phone orders from any customer, processes orders quickly.

Scenario 3: Customer Service Representative

Configuration:

```
First Name: Lisa
Last Name: Anderson
```

```
Email: lisa.anderson@example.com
Staff Group: Customer Service
Access All Customers: Yes
Can Edit Item Price: Yes
Can Create Customer: No
Commission: 0%
```

Assigned Customers: All customers

Use Case: Lisa assists customers with orders, applies discounts, but doesn't earn commission.

Scenario 4: Territory Manager

Configuration:

```
First Name: Robert
Last Name: Wilson
Email: robert.wilson@example.com
Staff Group: Territory West
Access All Customers: No
Can Edit Item Price: Yes
Can Create Customer: Yes
Commission: 10.0%
```

Assigned Customers: 150 customers in Western region

Use Case: Robert manages large territory, high commission rate, creates new B2B accounts.

Staff Account Management

Activate/Deactivate Staff

Deactivate:

1. Edit staff account
2. Set **Status**: Inactive
3. Save
4. Staff receives "Deactivated" email (if the corresponding email template is activated)
5. Staff cannot log in

Reactivate:

1. Edit staff account
2. Set **Status**: Active
3. Save
4. Staff receives "Activated" email (if the corresponding email template is activated)
5. Staff can log in again

Change Staff Group

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

3. Save
4. All future orders use new group

Reassign Customers

Remove Customer:

1. Edit staff account
2. Find customer in **Customers** grid
3. Click **Remove**
4. Save

Transfer Customers to Another Staff:

1. Go to **Customers > All Customers**
2. Select customers (checkboxes)
3. **Actions** > **Assign Primary Sales Staff**
4. Select new staff member
5. Submit

Update Commission Rate

1. Edit staff account
2. Change **Commission**
3. Save
4. New rate applies to future orders only

Email Notifications

Staff can receive emails (if corresponding templates are activated):

- **New Account**: Welcome email with login link
- **Activated**: Account activated notification
- **Deactivated**: Account deactivated notification
- **Password Reset**: Forgot password link
- **Password Updated**: Confirmation after password change
- **Order Placed**: When order is placed (if configured)

Troubleshooting

Staff Cannot Login

Check:

- Status is Active
- Email is correct
- Password is correct
- Website is correct

Solution: Reset password via "Forgot Password" link

No Customers Visible

Check:

- Customers are assigned to staff
- "Access All Customers" setting
- Customer group restrictions

Solution: Assign customers or enable "Access All Customers"

Commission Not Calculated

Check:

- Commission is set
- Commission type is configured
- Order is not canceled

Solution: Edit staff, set commission, save

Cannot Create Customer

Check:

- "Can Create Customer" is enabled (staff account)
- "Enable creating new customer" is enabled (configuration)

Solution: Enable both settings

Best Practices

Security

- Use strong passwords (min 12 characters)
- Enable two-factor authentication (if add-on installed)
- Regular password changes
- Deactivate departed staff immediately

Organization

- Use meaningful staff groups
- Consistent naming conventions
- Document territory assignments
- Regular customer assignment reviews

Commission

- Clear commission structure
- Document commission rules
- Regular commission reports
- Transparent earnings display

Training

- Provide staff login instructions
- Document customer impersonation process
- Train on price editing policies
- Explain commission calculation

Next Steps

Now that you have a staff account, explore the features:

Customer Assignment → Customer Impersonation → Commission System →