



SOFTWARESILOS

Sales Staff Extension

PDF Manual

MODULE

staff

LAST UPDATED

2026-03-29

Field Sales

Sales Staff Extension · /staff/use-cases/field-sales

How field sales representatives use the Staff extension to manage their territory and customers on the go.

Scenario

Company: Industrial Equipment Distributor

Sales Team: 15 field sales representatives

Territory: Regional coverage (North, South, East, West)

Customers: 500+ B2B customers

Average Order: \$5,000

Challenge

Field sales reps need to:

- Access customer information on-site
- Place orders during customer visits
- Apply custom pricing and discounts
- Create new customer accounts
- Track commission earnings
- Manage their territory efficiently

Solution

Staff Setup

Staff Groups:

- Territory North (4 reps)
- Territory South (4 reps)
- Territory East (4 reps)
- Territory West (3 reps)

Staff Configuration:

- Can Edit Item Price: Yes
- Can Create Customer: Yes
- Commission: 7.5%
- Access All Customers: No (territory-specific)

Mobile Access

Equipment:

- Tablet or smartphone
- Mobile data connection
- Magento responsive frontend

Staff Login: <https://yourstore.com/staff/account/login>

Typical Workflow

Morning: Plan Route

1. Login to staff dashboard
2. View customer list for territory
3. Filter by city/region
4. Plan visit sequence
5. Check customer notes

On-Site Visit

Step 1: Customer Meeting

- Discuss needs
- Review products
- Negotiate pricing

Step 2: Start Customer Context

- Staff dashboard > Customers
- Find customer
- Use the customer login action (tooltip: "Login to this account")

Step 3: Build Order

- Browse catalog
- Add products to cart
- Edit prices (apply negotiated discount)
- Review cart

Step 4: Complete Order

- Proceed to checkout
- Verify shipping address
- Select payment method
- Place order

Step 5: Confirmation

- Order confirmation displayed
- Commission calculated automatically
- Customer receives email
- Click "Logout from current customer" to return to staff context

New Customer Acquisition

Step 1: Collect Information

- Business card
- Company details
- Contact information

- VAT number

Step 2: Create Account

- Staff dashboard > Create Customer
- Enter customer details
- Select customer group (Wholesale)
- Add billing address
- Send email invitation

Step 3: First Order

- Login as new customer
- Place introductory order
- Apply welcome discount
- Complete checkout

End of Day

1. Review orders placed
2. Check commission earned
3. Add customer notes
4. Schedule follow-ups
5. Plan next day's route

Benefits

For Sales Reps

Efficiency:

- No need to call office
- Instant order placement
- Real-time inventory check
- Immediate confirmation

Flexibility:

- Custom pricing on-site
- Quick customer creation
- Mobile access anywhere
- Mobile web access (online)

Earnings:

- Real-time commission tracking
- Transparent calculations
- Performance visibility
- Goal tracking

For Management

Visibility:

- Real-time sales data
- Territory performance
- Rep productivity
- Customer coverage

Control:

- Price editing limits
- Approval workflows
- Commission management
- Territory assignments

Analytics:

- Sales by territory
- Rep performance
- Customer acquisition
- Average order value

For Customers

Service:

- Personalized attention
- On-site support
- Quick order processing
- Dedicated rep

Convenience:

- No phone orders needed
- Immediate confirmation
- Custom pricing
- Flexible terms

Key Features Used

1. **Customer Impersonation:** Place orders on behalf of customers
2. **Price Editing:** Apply negotiated discounts
3. **Customer Creation:** Onboard new customers on-site
4. **Commission Tracking:** Monitor earnings in real-time
5. **Mobile Access:** Work from anywhere
6. **Territory Management:** Staff groups by region

Best Practices

Preparation

Before Visit:

- Review customer history
- Check previous orders
- Note special requirements
- Prepare product samples

- Charge mobile device

During Visit

Professional:

- Dress appropriately
- Arrive on time
- Listen to customer needs
- Demonstrate products
- Provide solutions

Technical:

- Test internet connection
- Have backup (mobile hotspot)
- Know product catalog
- Understand pricing rules
- Practice order process

Follow-Up

After Visit:

- Add customer notes
- Schedule next visit
- Send thank you email
- Track order delivery
- Request feedback

Tools & Add-Ons

Recommended:

- **Staff API:** Mobile app integration
- **Customer History:** Track all interactions
- **Customer Visit:** Visit planning and customer visit workflows
- **Core Reports:** Territory performance analytics

Next Steps

- [Inside Sales Operations →](#)
- [Territory Management →](#)
- [Customer History →](#)