

SALES REPRESENTATIVE (for Magento 2)
User guide

GENERAL SETTINGS

Go to Stores=>Configurations=>Sales=>Sales Representative

Sales representative (SR) extension is enabled by default. Change the option to NO if you don't want to use this feature.

General Options ⌵

Enable at Front-End [store view] Use system value

Backend Options

Role with Full Access - choose a role with a full access to orders.

Role With Full Access [global]

-- None --

Administrators

Selected Role Provides Access to Restricted Area(Orders, Invoices, Reports)

Choose a Magento role to provide a full access to the orders if restriction mode is enabled. If you don't want your Sales Representatives to see all orders, you can restrict an access.

Restrict Access

Restrict Access [global] Use system value

If "Yes", Sales Representative Will Be Restricted In Order and Invoice Grids

If your SRs have an access to your Magento admin, you can allow or disallow to see all orders/reports/invoices. If YES is enabled, each Sales Representative will see **own** orders only. All orders will be shown **for users will full access**.

Assign SR To The Order Automatically

Assign SR To The Order Automatically [global] Use system value

If the order is created by SR, this SR will be assigned to the order automatically.

Assign SR To The Order Automatically - yes/no. If YES is set up, all orders, created by SR via **Magento admin**, will be assigned to this SR automatically. In such case, **order rate** will be applied. If this option is disabled, SR can be assigned to the orders manually.

Go to Sales => Representative => Members.

The screenshot shows the Magento Admin interface. On the left is a dark sidebar with a navigation menu. The 'Sales' section is expanded, and 'Members' is selected. The main content area shows a table with the following columns: First Name, Last Name, Status, and Action. The table is empty, and a message reads 'We couldn't find any records.' Above the table, there are controls for 'Filters', 'Default View', and 'Columns'. Below these, there is a pagination control showing '20 per page' and '1 of 1'. In the top right corner, there is a yellow banner for 'System Messages: 1' and a user profile for 'admin'. An orange 'Add New Member' button is located in the top right of the main content area. At the bottom right, it says 'Magento ver. 2.1.6' and 'Report Bugs'.

ADD NEW MEMBER

Enable Member: *yes/no*

First Name*: *required text field*

Last Name*: *required text field*

Associate with Back-End User - *choose this option if you want to assign this member to the existing admin user. Or just skip it. If SR isn't associated with the admin user, he won't have an access to the Magento admin.*

Default Rate for Products

*Fill all fields below if you want to calculate commissions **for the products**. Or skip this tab.*

Priority - *choose values from 1 to N. 1 - a top priority. (If some products and customers are assigned to the SR and assigned customer purchased assigned items, the rate with top priority will be applied.*

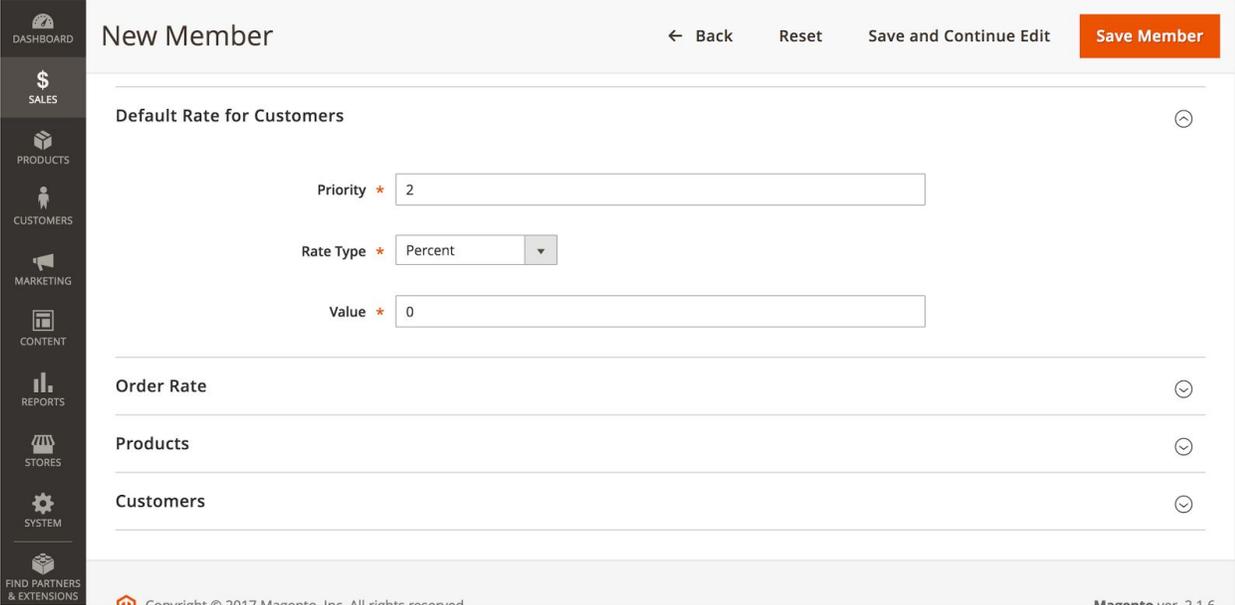
For example Customer N and Product N have been assigned to the Sales Rep. Customers rate = 10%, Product Rate = 20%. Product Priority = 1, Customer Priority = 2. If Customer N purchase product N, SR will receive 20% commission because of Product Priority.)

Rate Type - choose preferred value: percent or fixed rate.

Value - add rate's value (numerical value).

Default Rate for Customers

Fill all fields below if you want to calculate commissions for purchases of customers. Or skip this tab.



Priority - choose values from 1 to N. 1 - a top priority. (If some products and customers are assigned to the SR and assigned customer purchased assigned items, the rate with top priority will be applied. For example Customer N and Product N have been assigned to the Sales Rep. Customers rate = 10%, Product Rate = 20%. Product Priority = 1, Customer Priority = 2. If Customer N purchase product N, SR will receive 20% commission because of Product Priority.)

Rate Type - choose preferred value: percent or fixed rate.

Value - add rate's value (numerical value).

Order Rate

Fill all fields below if you want to calculate commissions for all orders, created by SR. Or skip this tab.

*Order Rate applies to the orders, created by SR in Magento Admin.

Rate Type - choose preferred value: percent or fixed rate.

Value - add rate's value (numerical value).

Products

Choose products if you want to calculate commissions for the products.

Note: if you add config(bundle) product and products, assigned to this product, commissions will be applied for both products. So choose or simple or config product.

ID	Name	SKU	Price	
2045	Erika Running Short	WSH12	\$45.00	
<input checked="" type="checkbox"/>	2044	Erika Running Short-32-Red	WSH12-32-Red	\$45.00
<input type="checkbox"/>	2043	Erika Running Short-32-Purple	WSH12-32-Purple	\$45.00
<input type="checkbox"/>	2042	Erika Running Short-32-Green	WSH12-32-Green	\$45.00
<input type="checkbox"/>	2041	Erika Running Short-31-Red	WSH12-31-Red	\$45.00
<input type="checkbox"/>	2040	Erika Running Short-31-Purple	WSH12-31-Purple	\$45.00

Customers

Choose customers if you want to calculate commissions for purchases of customers.

Edit Member ← Back Delete Member Reset Save and Continue Edit **Save Member**

Order rate Products Customers

Search Reset Filter 1 records found 20 per page 1 of 1

<input checked="" type="checkbox"/>	ID	First Name	Last Name	Email
<input checked="" type="checkbox"/>	2	NY	Ignore	support@brainacts.com

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Save member

REPORTS

Go to Reports=>Sales Representative

Reports admin Earn

Marketing	Sales	Customers
Products in Cart	Orders	Order Total
Search Terms	Tax	Order Count
Abandoned Carts	Invoiced	New
Newsletter Problem Reports	Shipping	Products
Reviews	Refunds	Views
By Customers	Coupons	Bestsellers
By Products	PayPal Settlement	Low Stock
	Braintree Settlement	Ordered
		Downloads

Sales Representative

- Sales Representative
- By Products
- By Customers
- By Orders
- By SR

Earn

\$9.00
\$10.80
\$21.20

Report by Products

All commissions, applied by the product rule are shown in the products report.

Interval	Product	Price	Order Quantity	Order Id	Rate Type	Rate Value	Earn
May 19, 2017	Erika Running Short-32-Red	\$45.00	1	00000003	Percent	10.0000%	\$4.50
Total		\$0.00	1				\$4.50

- Choose date range.
- Choose sales representative.
- Click on “Show Report” button.

Report by Customers

All commissions, applied by the customer rule are shown in the products report.

Interval	Price	Order	Rate Type	Rate Value	Earn
May 19, 2017	\$28.00	00000004	Percent	20.0000%	\$5.60
Total	\$0.00				\$5.60

- Choose date range.
- Choose sales representative.
- Click on “Show Report” button.

Report by Orders

All commissions, applied by the order rule are shown in the products report.

System Messages: ▲ 1

Orders Report

🔍 🔔 👤 admin ▾

Store View: All Websites ▾ ?
Show Report

Filter

From * 📅

To * 📅

Member ▾

Interval	Price	Order	Rate Type	Rate Value	Earn
May 19, 2017	\$180.00		Fixed	\$10.00	\$10.00
Total	\$0.00				\$10.00

Report by SR

All SR's commissions are shown in the report by SR. So, if you need to see the common report and calculate commissions for the certain Sales Rep, use the report by SR.

Report By SR

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Store View: All Websites ▾ ?
Show Report

Filter

From * 📅

To * 📅

Member ▾

Interval	Product	Product Price	Rule	Order Id	Order Subtotal	Rate Type	Rate Value	Earn
Sep 13, 2017		\$0.00	Automatic Assignment	00000013	\$225.00	Percent	5.0000%	\$9.00
		\$0.00	Customer Rule	00000014	\$54.00	Percent	20.0000%	\$10.80
		\$0.00	Customer Rule	00000015	\$106.00	Percent	20.0000%	\$21.20
	Erika Running Short-28-Green	\$45.00	Product Rule	00000016	\$0.00	Percent	10.0000%	\$4.50
	Erika Running Short-31-Red	\$45.00	Product Rule	00000017	\$0.00	Percent	10.0000%	\$4.50
	Erika Running Short-28-Green	\$45.00	Product Rule	00000018	\$0.00	Percent	10.0000%	\$18.00
		\$0.00	Manual Assignment	00000020	\$50.00	Percent	5.0000%	\$2.50
Sep 1, 2017		\$0.00	Manual Assignment	00000008	\$28.00	Percent	5.0000%	\$1.40
Total		\$0.00			\$463.00			\$71.90

Choose date range.
Choose sales representative.
Click on “Show Report” button.

ORDER GRID.

There is an ability to add new column “Representative” to order grid.

The screenshot shows the 'ORDER GRID' interface. A 'Columns' modal is open, displaying a list of columns to be shown in the grid. The 'Representative' column is checked. The grid below shows three records with columns for ID, Purchase Point, Purchase Date, and Billing Address. The 'Create New Order' button is visible in the top right.

ID	Purchase Point	Purchase Date	Billing Address
000000005	Main Website Main Website Store Default Store View	May 19, 2017, 13:05:00 PM	Ver...
000000004	Main Website Main Website Store Default Store View	May 19, 2017, 12:05:00 PM	NY I...
000000003	Main Website Main Website Store Default Store View	May 19, 2017, 12:05:00 PM	NY I...

ORDER VIEW.

New tab (Representative) is added to order view.

The screenshot shows the 'ORDER VIEW' interface for order #000000004. The 'Representative' tab is selected in the left sidebar. The main content area shows a table with columns for First Name, Last Name, and Rule. The 'test' record is visible. The 'Edit' button is highlighted in orange.

First Name	Last Name	Rule
test	2	By Customer

Sales Representative is assigned to the order by default if all conditions are met.
You can also assign or change SR to the order manually.

If you have any questions, get in touch with us:

<https://www.brainacts.com/contacts>

support@brainacts.com