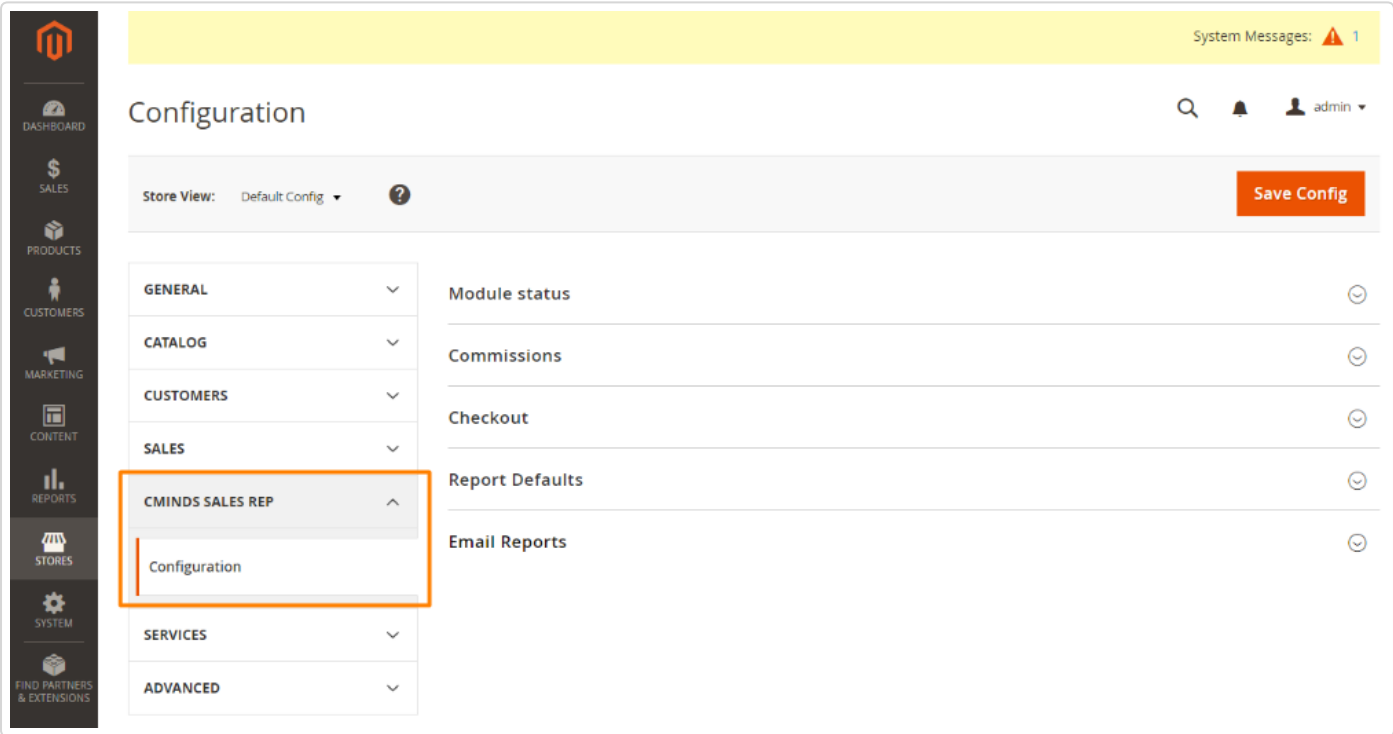
Sales Rep Magento 2 - Configuration

Configuration

The first thing to do after completing the installation is to set up the extension.

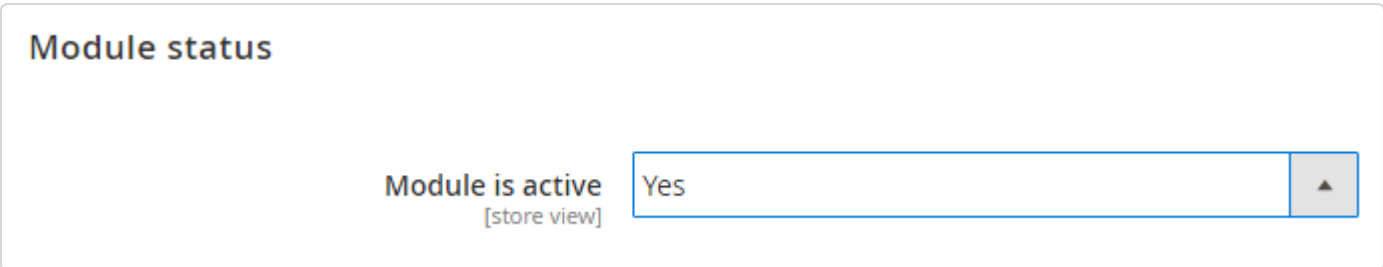
Log in as Admin and go to **Stores** → **Configuration** → **CMINDS SALES REP** → **Configuration.**

The Configuration panel has five sections: Module status, Commissions, Checkout, Report Defaults and Email Reports.



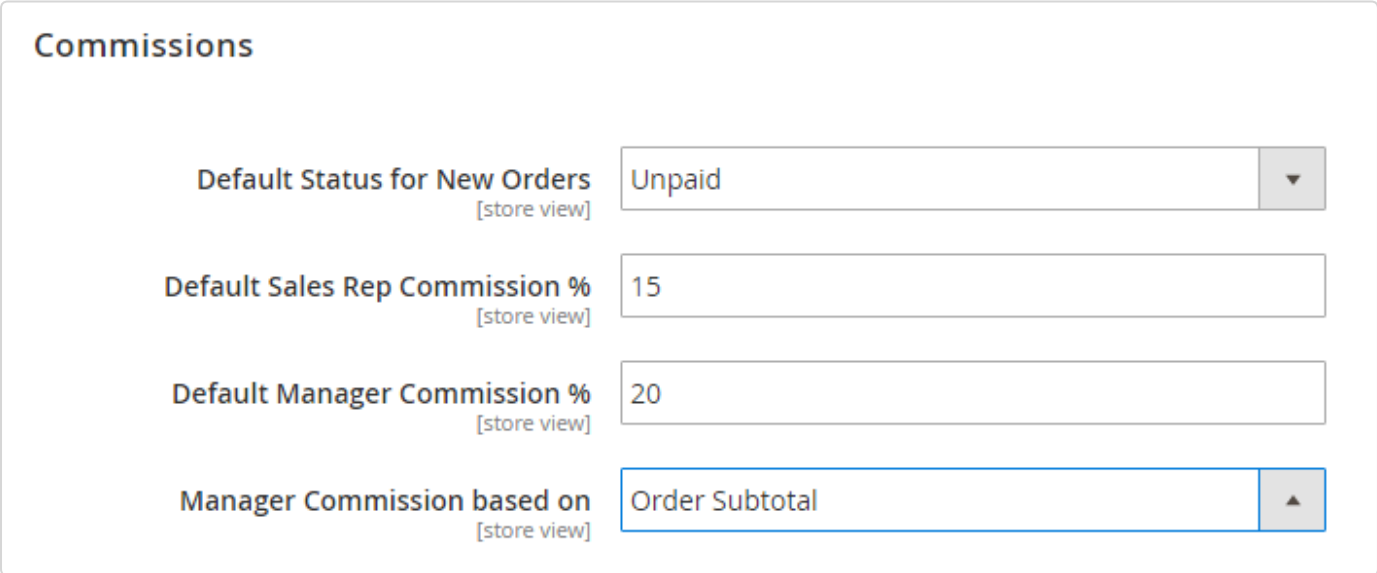
Module status

The admin can choose whether or not the module will be active.



Commissions

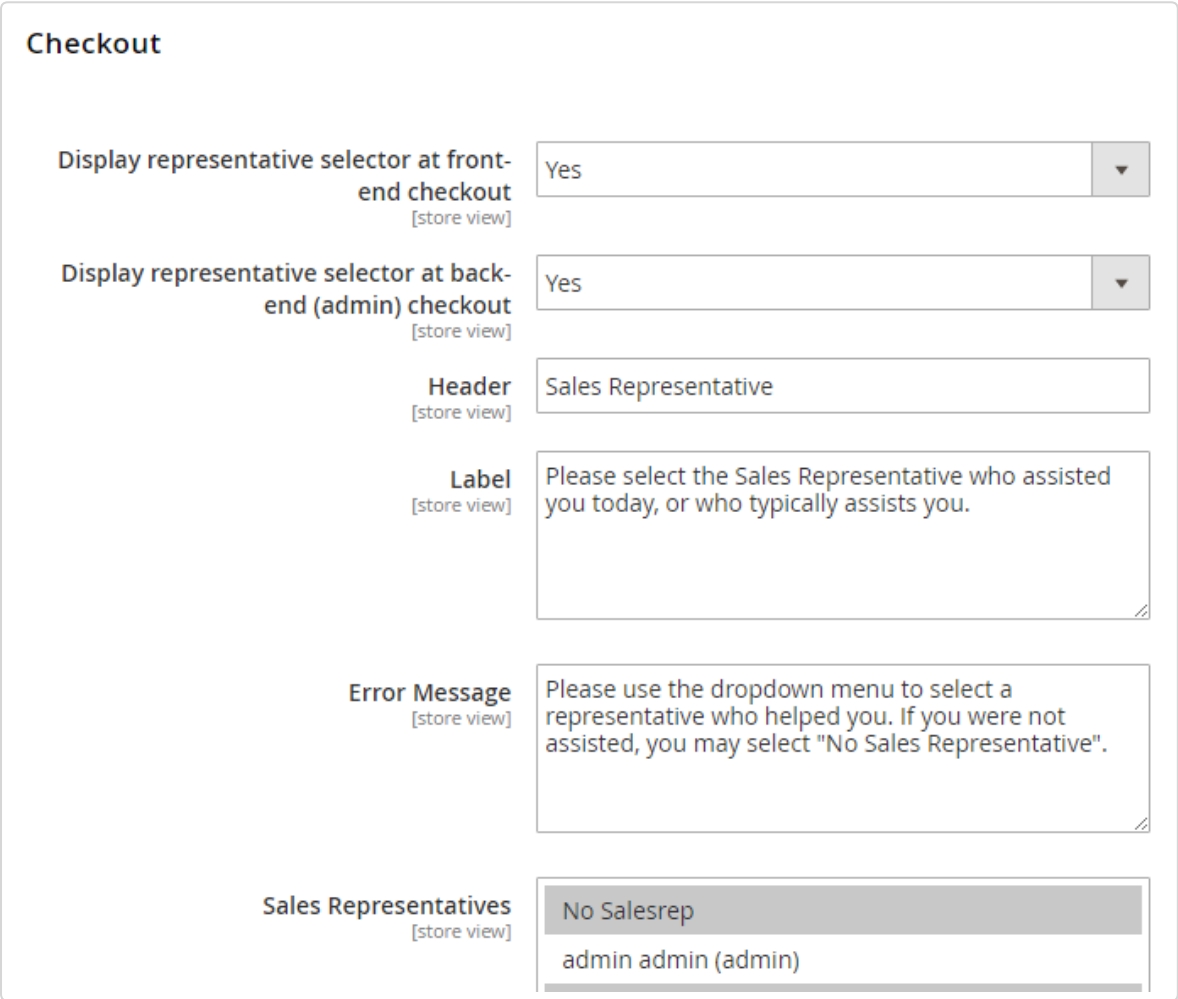
Default Status for New Orders	• Unpaid • Ineligible	When a new order is created, what should it be marked as? “Ineligible” is mostly for companies where not every order earns a commission. Commission status is separate from order status.
Default Sales Rep Commission %	{Text Field}	Choose what the default commission rate will be (individual reps’ rates and product rates can vary, this is just the default).
Default Manager Commission %	{Text Field}	What percentage should managers be paid? Below you’ll specify in what the percentage will be based on.
Manager Commissions based on	• Order Subtotal • Employee Commission	Do you want your managers commission to be a percentage of the order subtotal, or of the employee commission? For example, you can reward the manager with 1% of the order subtotal, or give him 10% of the commission earned by his employee (if you rely heavily on product-specific rates, for example).



Checkout

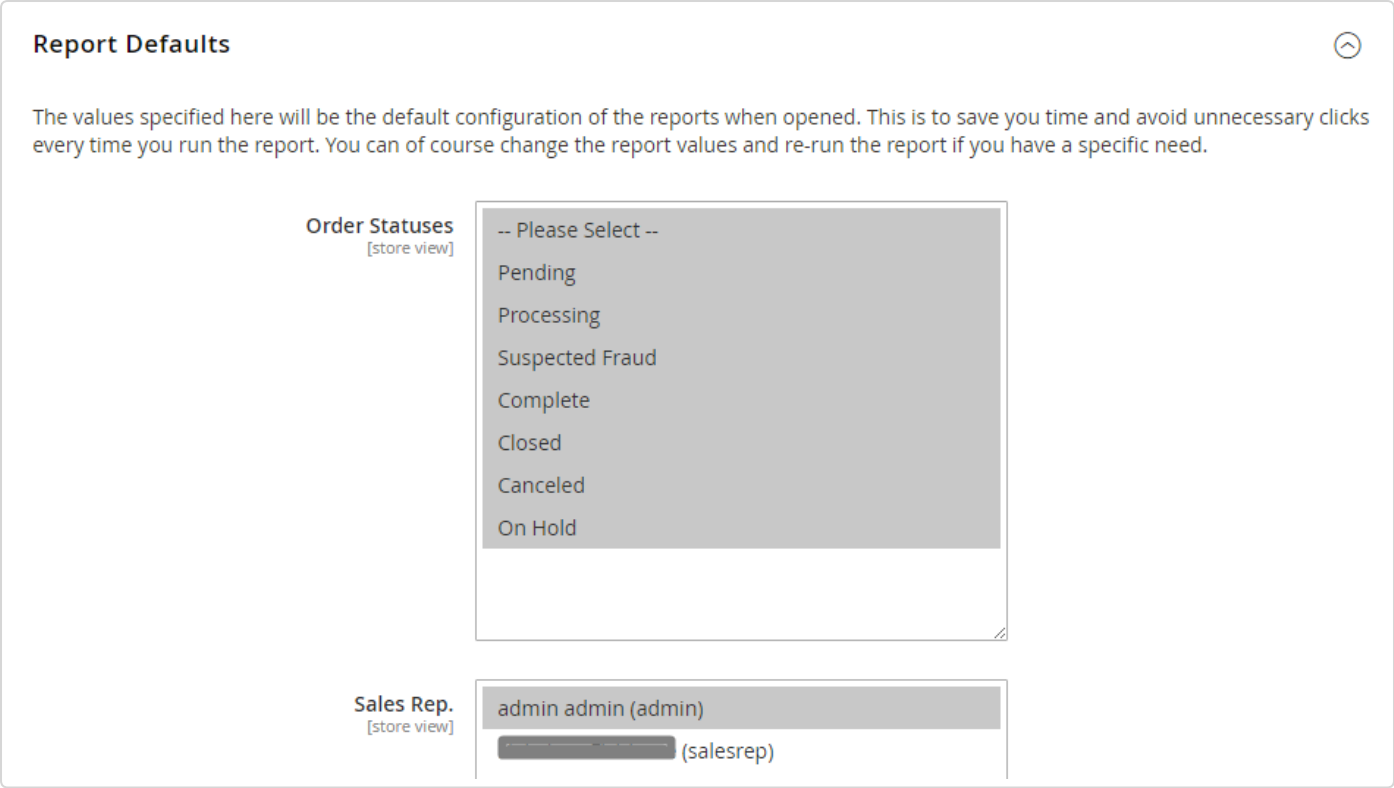
Display representative selector at frontend checkout	• Yes • No	Show a selector on the frontend? Uses the selection below to determine which names display.
Display representative selector at backend (admin) checkout	• Yes • No	When creating orders in the backend, should there be a selector? This selector shows ALL usernames, regardless of which are shown on the frontend.
Header	{Text Field}	What should be the title of the heading at checkout? Default text included.

Label	{Text Field}	How do you wish to explain the selection? Default text included.
Error Message	{Text Field}	What error message is displayed when the customer does not make a selection?
Sales Representatives	{Selection Field of Users}	Use the Ctrl key to select multiple users to display on the frontend. Those not selected will not be shown.



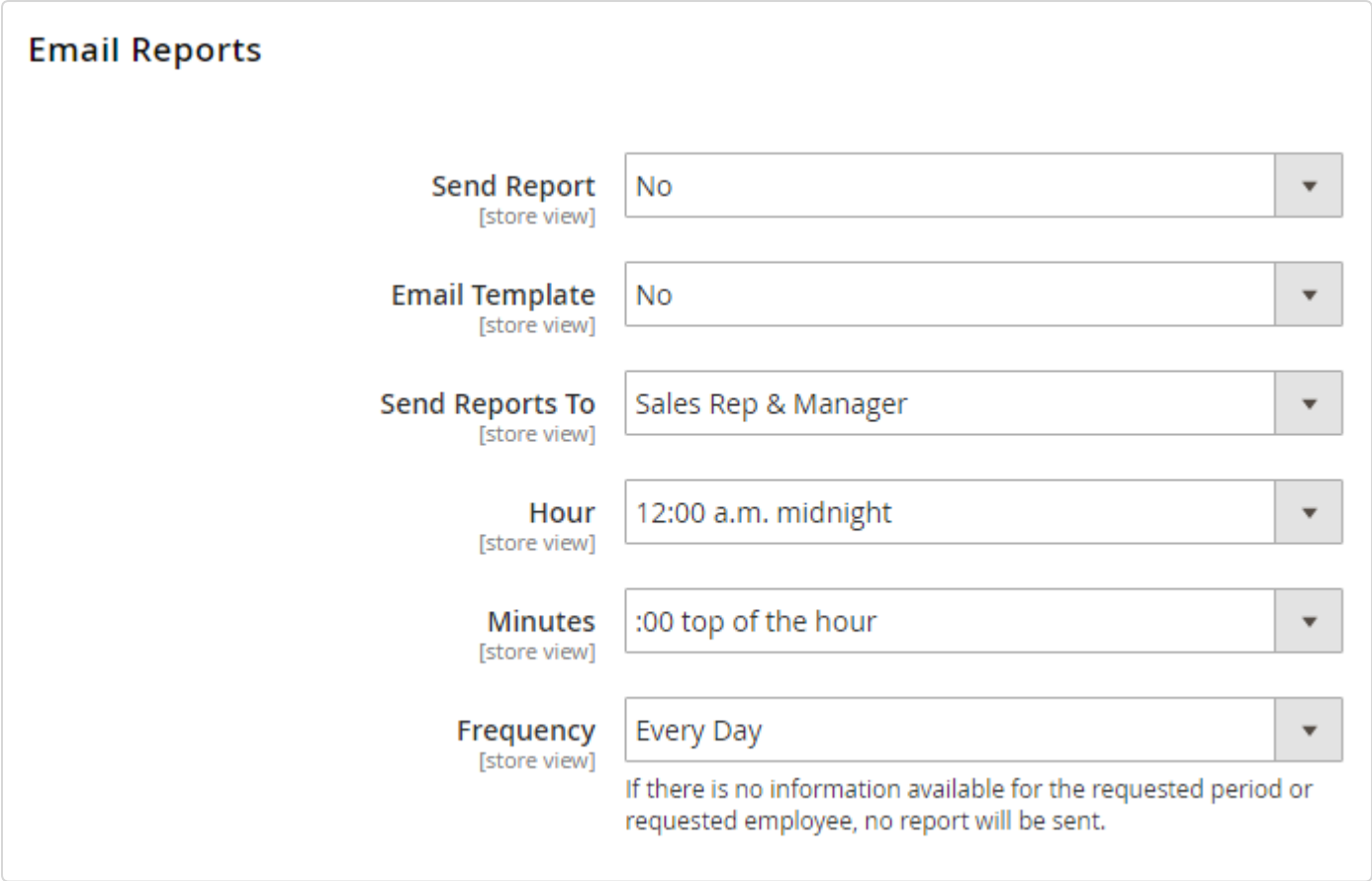
Report Defaults

Order Statuses	• Complete • On Hold • Processing • (other)	Which order statuses would you like to be shown by default when the report is generated?
Sales Rep.	(List of your users)	Which reps would you like to be shown by default when the report is generated?

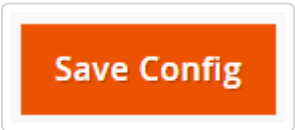


Emails Reports

Send Report	• Yes • No	Admin can decide whether or not send email reports
Email Template	• SalesRep Comission Report (Default)	Uses the default email template, which you can customize just like you would order emails. The default template uses the same exact design as the backend report.
Send Reports To	• Sales Rep & Manager • Sales Rep, Manager & Admin	Who will receive reports? Note that if you did not give non-admin users permissions to see others' earnings or names above, these columns will appear blank according to your selections.
Hour	{Each hour of the day}	Uses the time your server is set to
Minutes	{15 Minutes Increments}	Uses the time your server is set to
Frequency	• Every Day • Every Weekday • Every Friday • 15 th & Months end • Months end	How frequently email reports are sent. Month's end is the last day of the month, be it 29 th, 30th, or 31st.



Finally, remember to **Save the Configuration!**



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RELATED SUPPORT DOCUMENTS

- Sales Rep Magento 2 - Orders (/article/1211-sales-rep-magento-2-orders)
- Sales Rep Magento 2 - Permissions (/article/1350-sales-rep-magento-2-permissions)

Sales Rep Magento 2 - Customers

Assigning Representatives to Customers

Customers can be assigned semi-permanently to a specific Sales Representative.

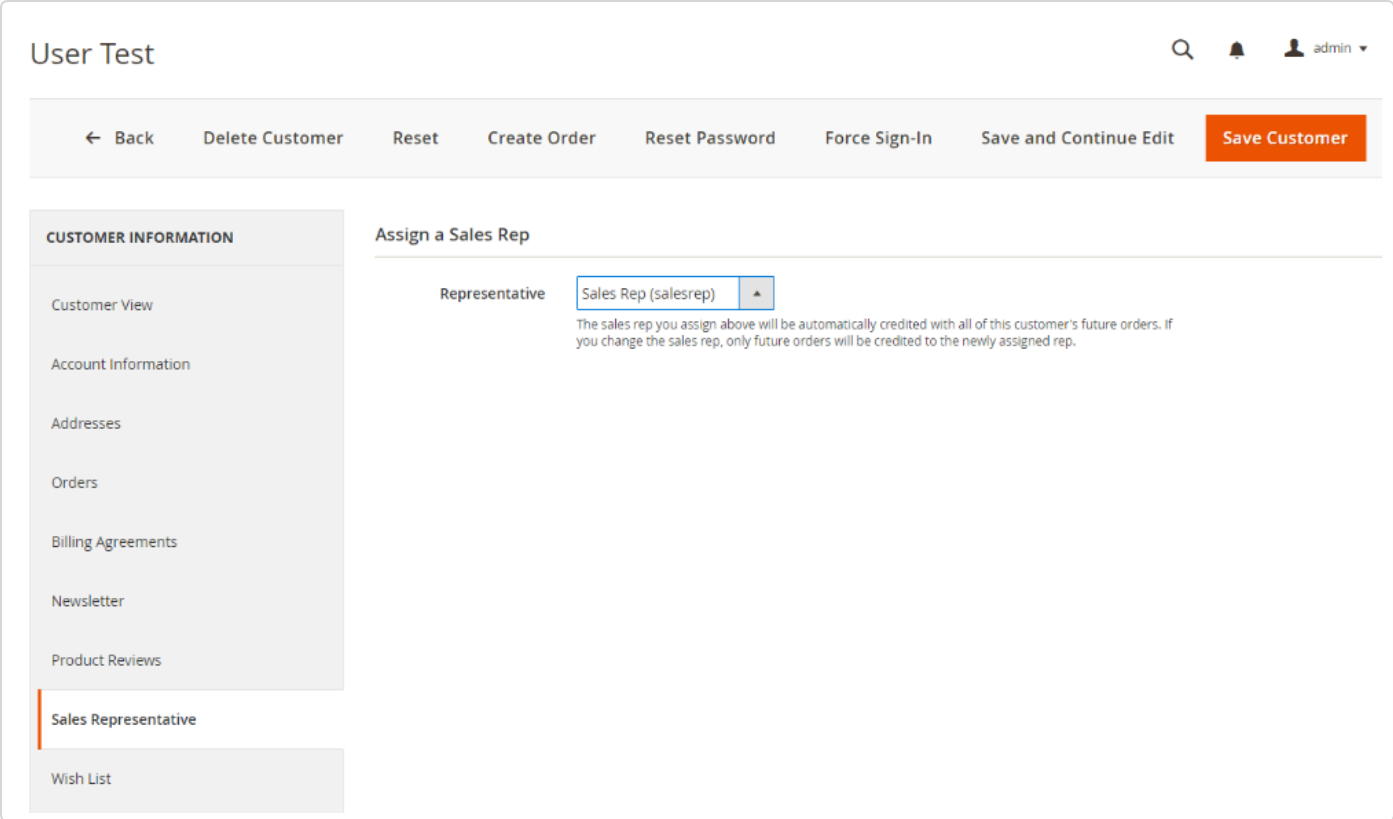
This means that all future orders from that customer, whether entered in the frontend or backend, will be credited to the sales rep they are assigned, until changed by an Admin or Manager with sufficient permissions.

If a rep inputs an order for a customer that is not his own, he will not have the ability to assign himself as the commission earner, unless he has been given the appropriate permissions.

If a representative creates a new customer from the backend, he will automatically be assigned as the representative for that customer. This can be changed by an Admin or Manager with appropriate permissions.

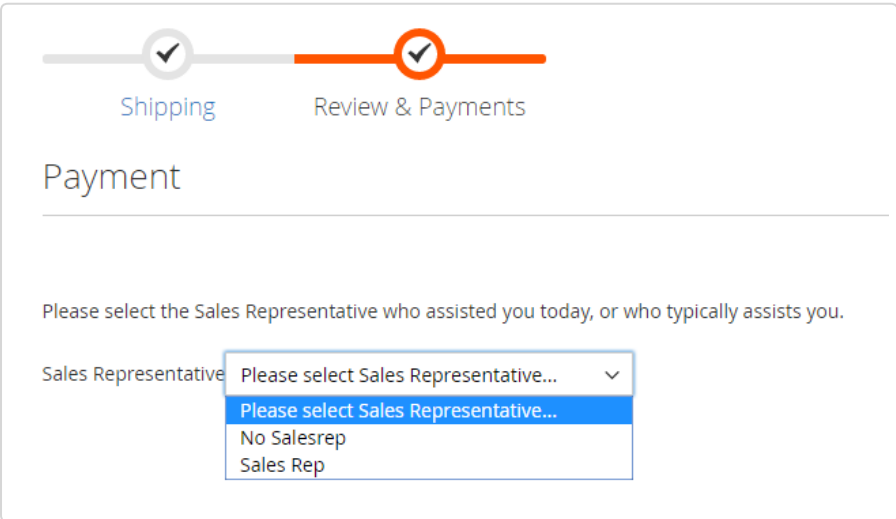
To assign a representative to a specific customer;

1. Navigate to **CUSTOMERS**→ ***All Customers***
2. Select the Customer you wish to assign
3. Click the Sales Representative tab on the left
4. Select the appropriate representative from the dropdown
5. Click “Save Customer” on the top right
6. Repeat for each of the customers you wish to assign.



Any customer that has already been assigned to a sales representative will not see the checkout selector or checkout step on the front end of the website.

If a customer *without* a rep creates an order on the front-end of the site where the front-end selector has been enabled, his choice of rep will be not be assigned to his account automatically. This is to allow customers to be served by multiple reps in the future.



Changing Assigned Representatives

Assigned representatives can be changed by an Admin or Manager with appropriate permissions, using the same process as manually-assigning a representative for the first time.

Once the representative is changed, the manager will also be changed to coincide with the manager of the newly-assigned rep.

Furthermore, all previous orders will remain unchanged, and will still be credited to the rep that served the customer at the time of placement.

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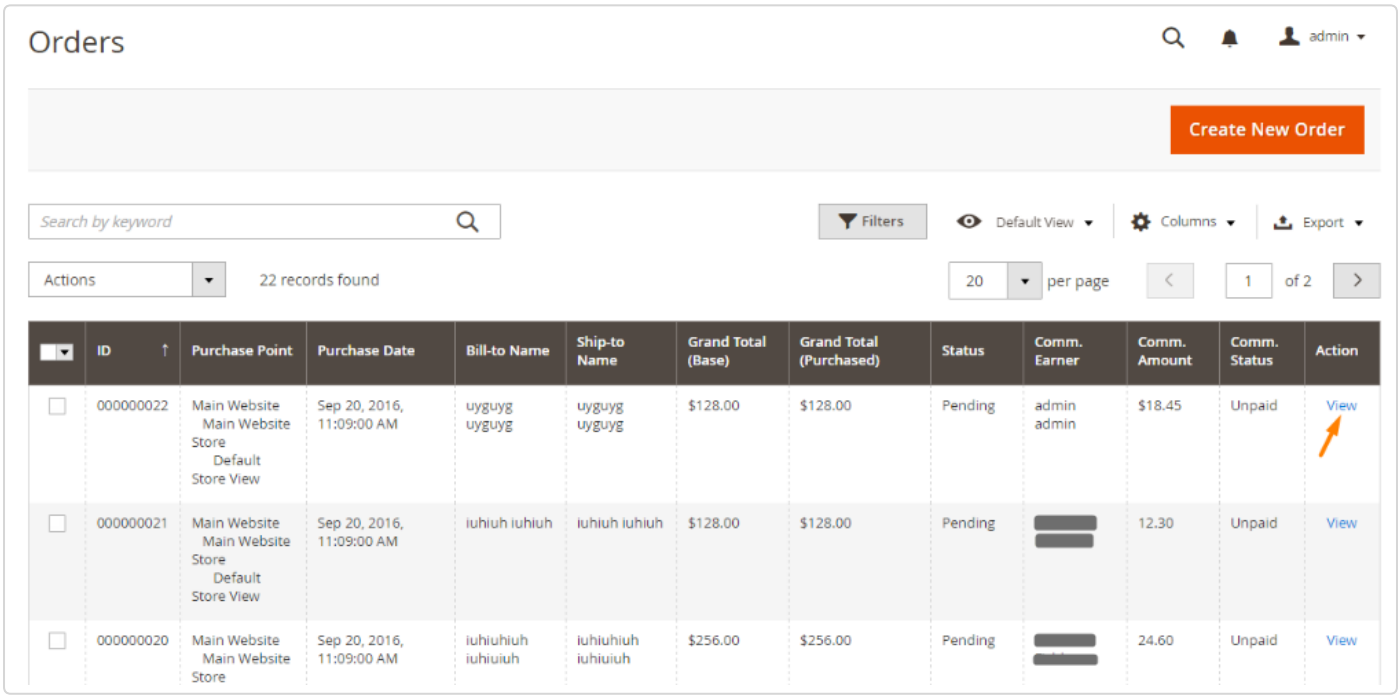
Sales Rep Magento 2 - Permissions (/article/1350-sales-rep-magento-2-permissions)

Sales Rep Magento 2 - Orders

Order Grid

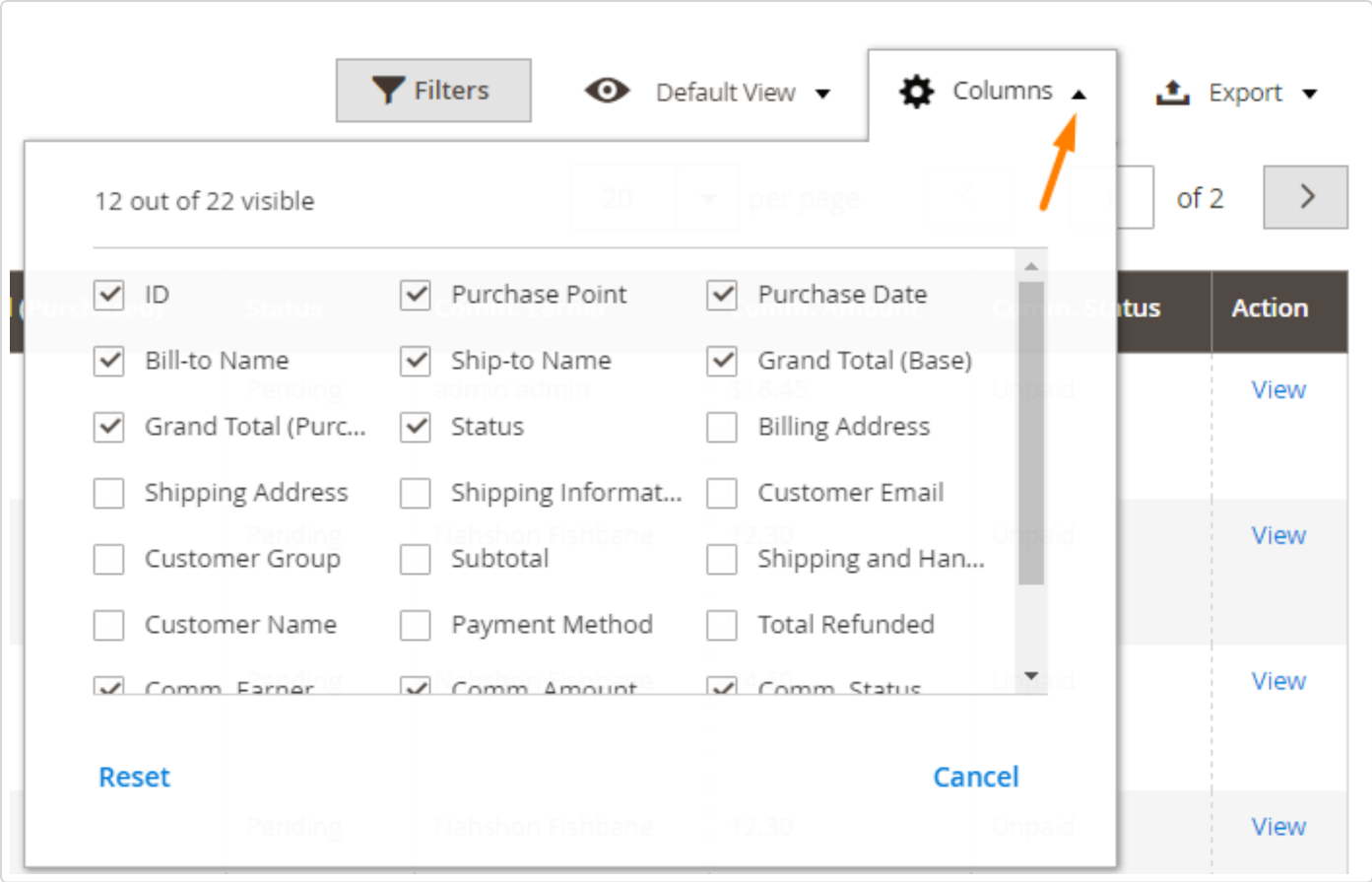
To access the list of all Orders placed on your website, please go to **SALES → Orders.**

Though information cannot be changed from the order grid directly, this offers a great “ata-glance” perspective on how your team is performing in real time.



Depending on the options you selected during configuration, your order grid may show different columns.

Keep in mind that admins can see all information here, but depending on the Roles settings, other employees may not be able to see earnings or even names.



Order Page

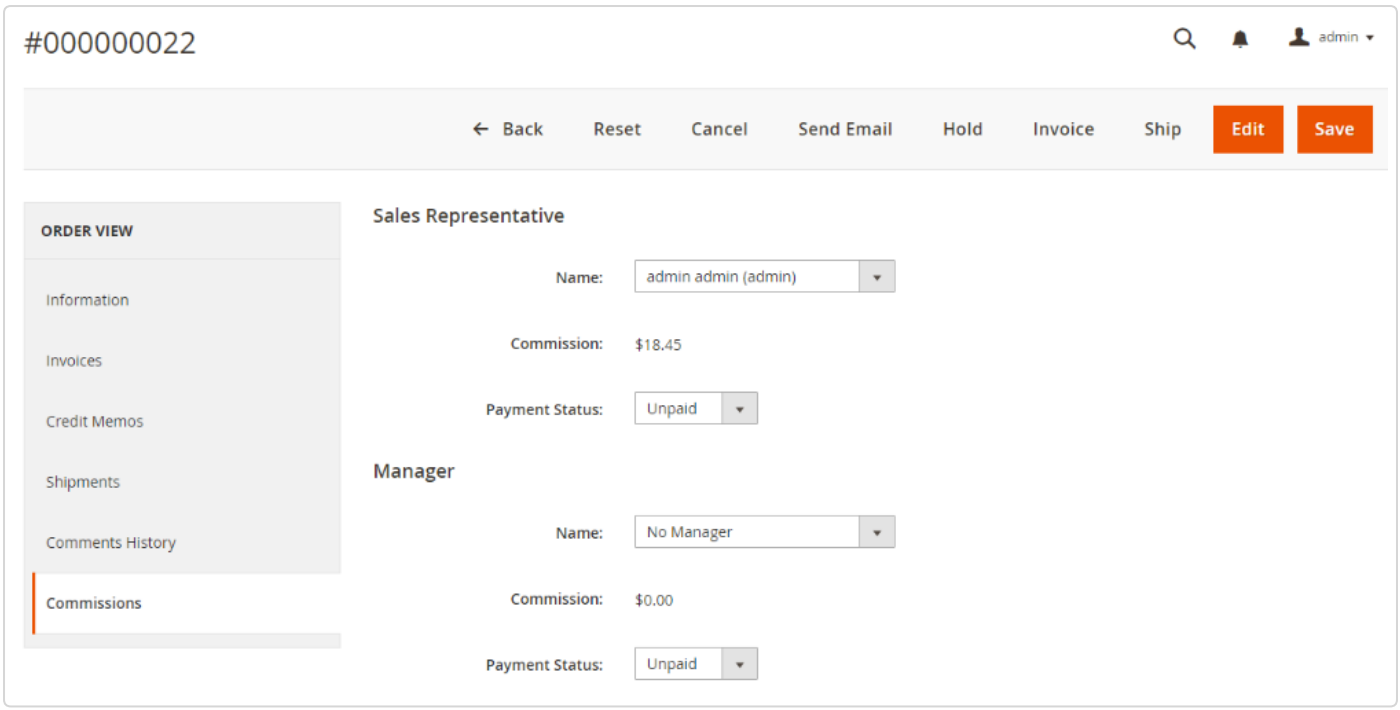
When viewing a specific order, the information on the Sales Rep/ Manager commission is under the tab '**Commission**'.

Depending on the user's permissions, he or she will see:

- Name of the sales representative assigned to the order
- Name of the manager assigned to the order
- Commission Earned by the Sales Rep
- Commission Earned by the Manager
- Payment Status of the Sales Rep's commission
- Payment Status of the Manager's commission
- Dropdowns that allow admins to change the commission earner or payment status

Because different users may have different commission rates, the commission amount will be dynamically updated any time the commission earner is changed.

Admins (or managers with appropriate permissions) can easily update commission payment status to reflect whether or not commissions are eligible or paid.



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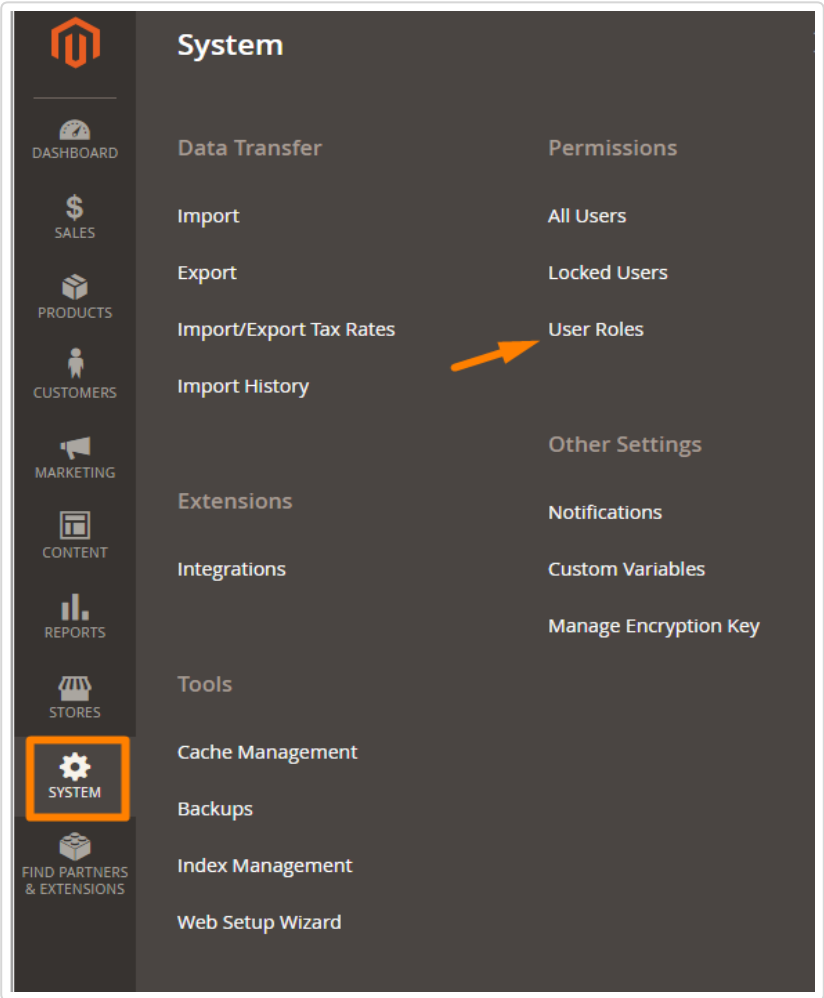
Sales Rep Magento 2 - Permissions (/article/1350-sales-rep-magento-2-permissions)

Sales Rep Magento 2 - Permissions

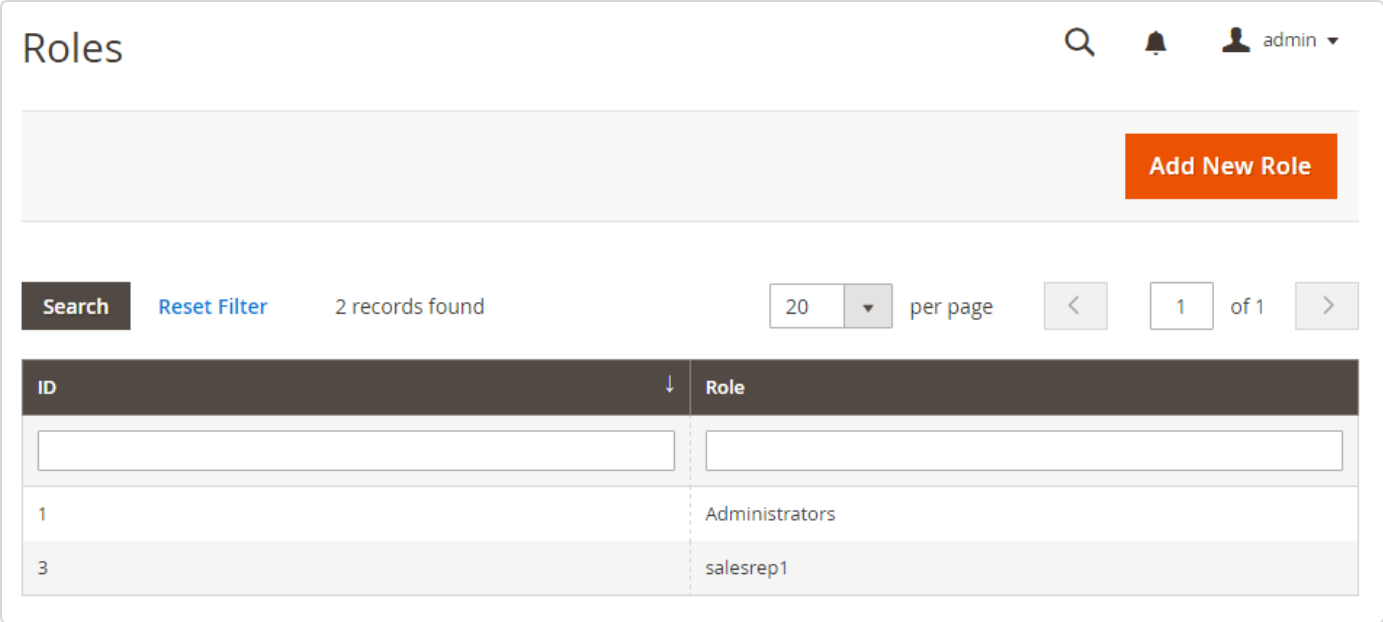
User Roles

Our extension provides separated resources entries that allows you to create different roles and set a different set of permissions for each role depending on what their needs and abilities should be.

In order to do configure that, please go to **System** → **User Roles**.



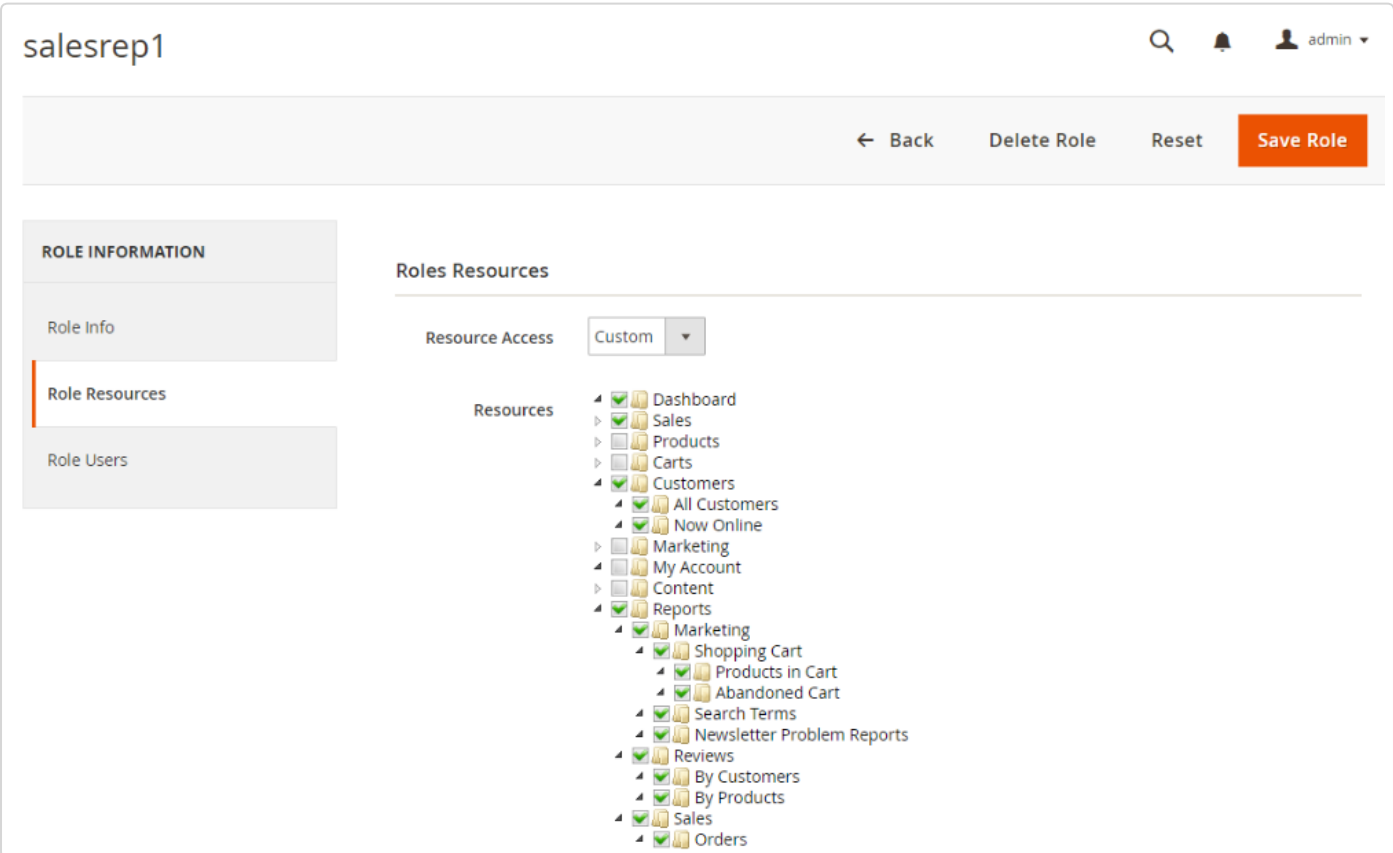
You will be able to check the list of roles already created, or to create a new role.



When you click on a specific role, you will be able to edit the Role Info, Resources (permissions) and Users.

Setting Role Resources

It's easy to check and specify how each role (i.e. Sales Rep, Store Owner, Manager) will interact with the module.



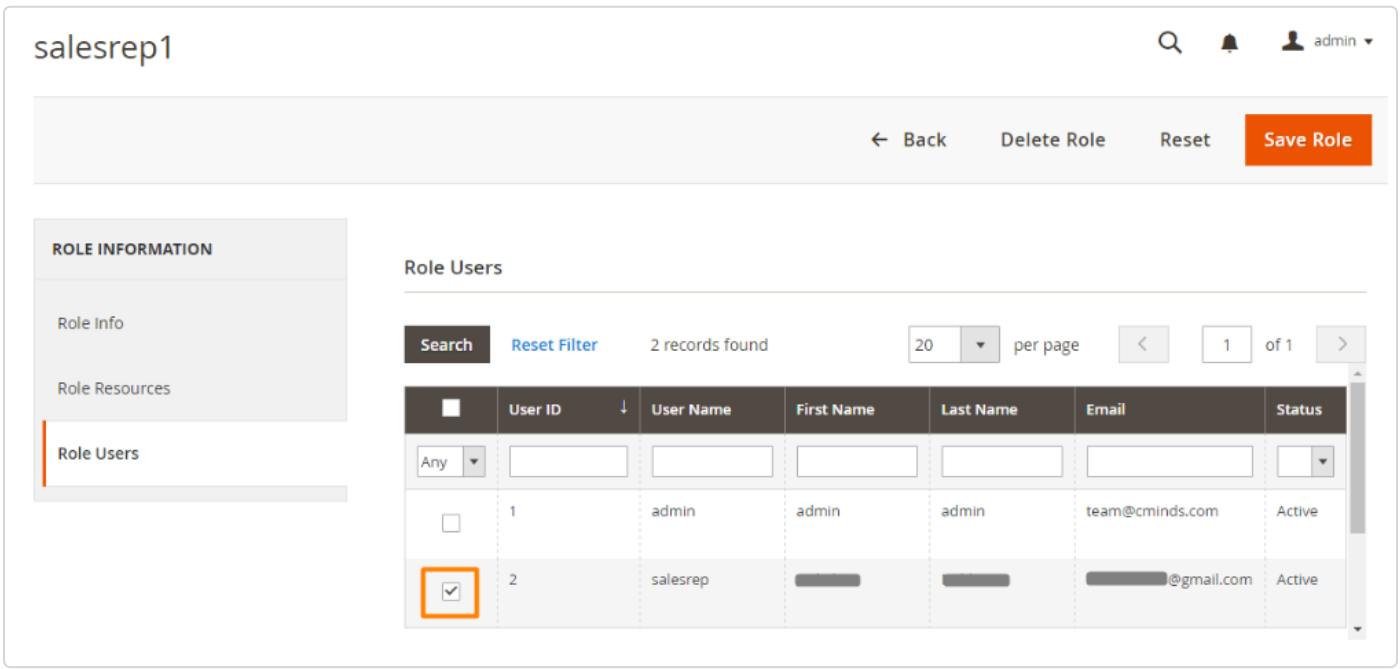
These permissions should be fairly self-explanatory, and we recommend thinking about your business' specific needs in order to design a custom permission-set for each role that suits your needs.

However, in order to get you started, here are our suggested permissions.

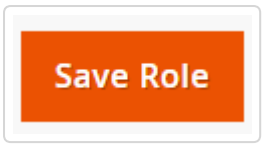
ADMIN (Store Owner)	MANAGER	SALES REPRESENTATIVE
The admin should be able to see and modify every aspect of the module's functionality. The easiest way to do this is to assign "All" resource access in the drop-down. However, if you have a partner, high level manager, or for some reason want to withhold certain permissions from an admin-level login, you can select "Custom" and select however many "All Users" checkboxes as you see fit. Of course, having multiple levels of Admins is an option, as well.	Managers should be able to see and modify the orders of the people they manage, and also their own orders. It's up to you to decide if managers have the capability to modify commissions, commission rates, payment statuses, assigned sales representatives, depending on the level of trust you place in your managers. Optionally, you can create multiple classes of managers, giving more permissions to some managers.	Sales Reps should only be able to view commission details of their own orders, unless you wish for them to see the commissions of other reps as a motivational tactic. Under almost no circumstances should they be able to update commissions, rates, or commission payment statuses, nor should they be able to change the assigned rep on an order. It's generally a good idea to allow reps to see who is the assigned rep on an order, though, for customer service efficiency.

Defining Role Users

It's worth it to put in the time to think about what roles your reps, managers, and fellow admins should be able to fulfill in the order and commission process.



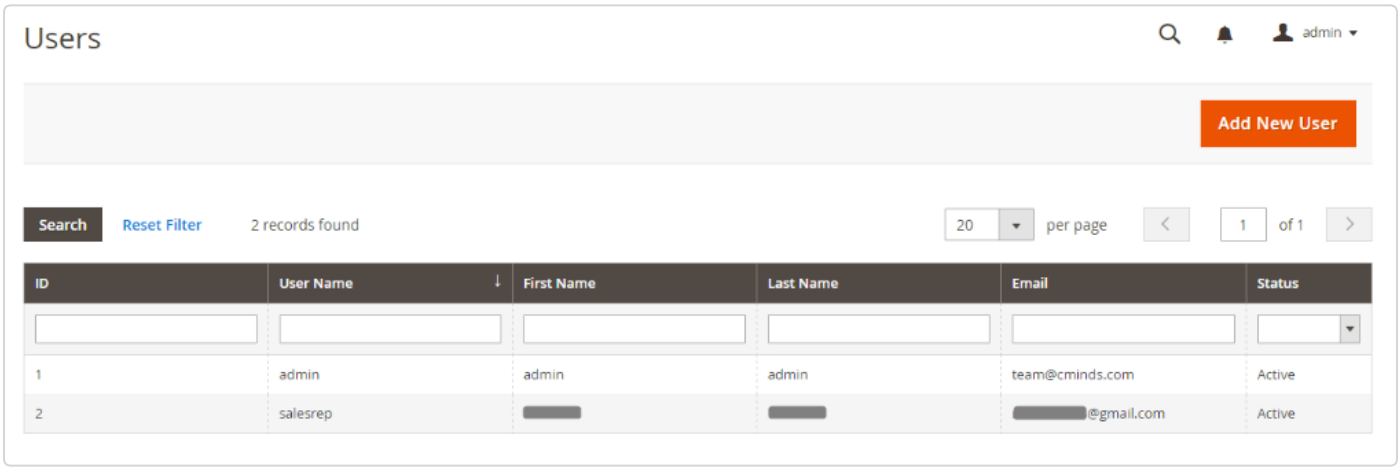
Finally, remember to **'Save Role'!**



Users

Also in the User Permissions area, it is possible to specify a few key user-specific settings. These include custom commission rates where applicable, as well as manager/employee relationships.

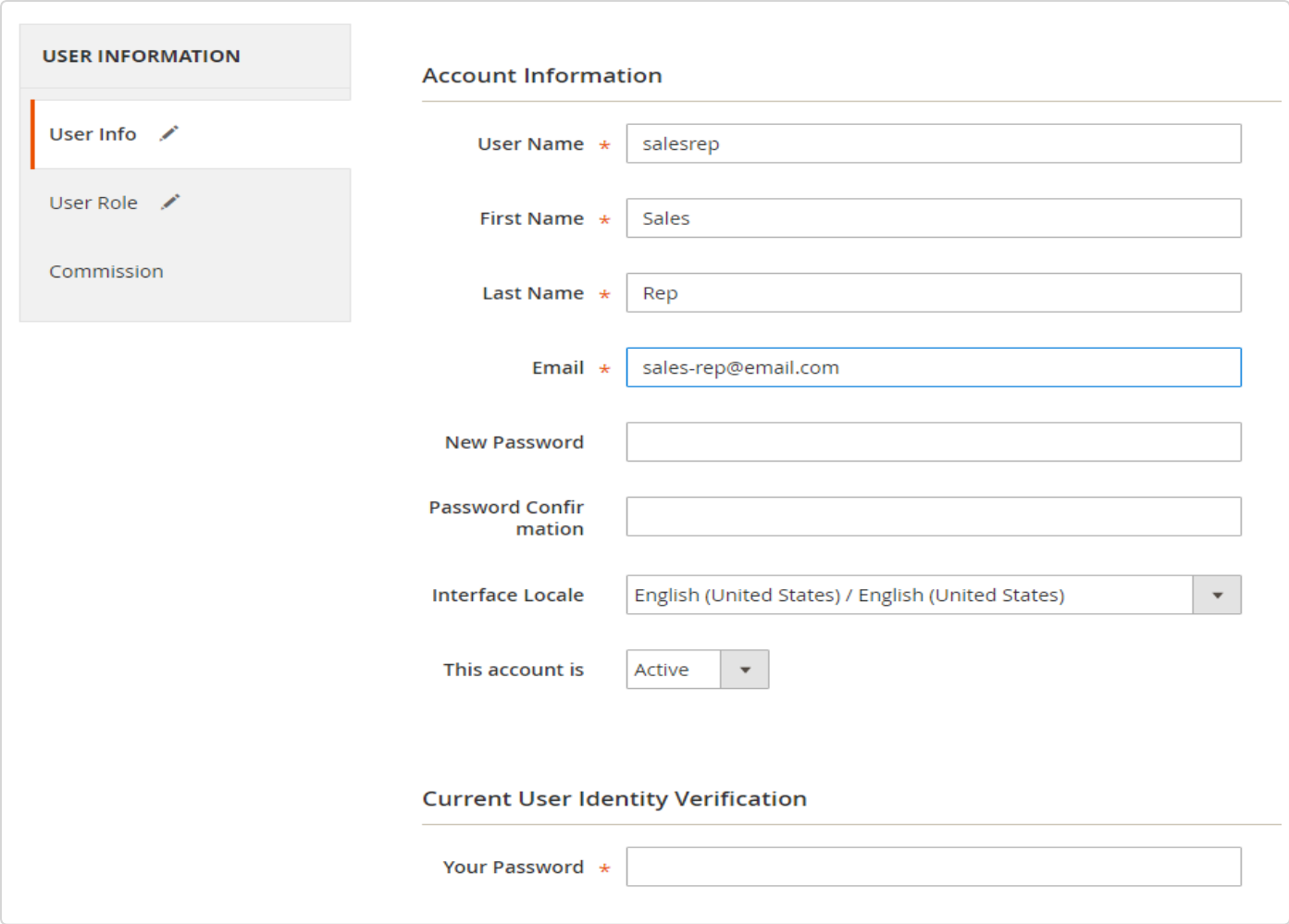
For that, please go to **Settings** → **All Users** and them click on the user name you wish to configure.



At the User Information panel, it is possible to verify and edit the User Info, User Role and Commission.

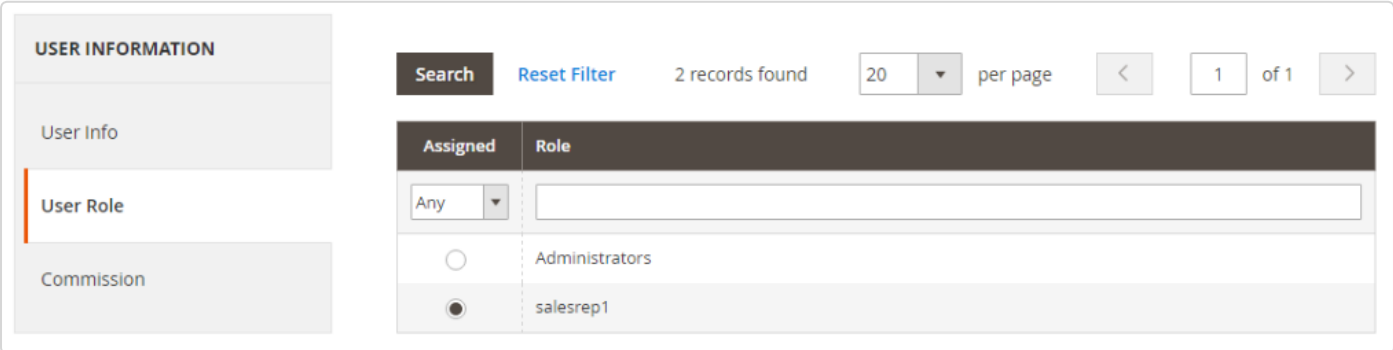
User Info

Here you can set the basic account information, such as name, email, interface local and status of the account.



User Role

In this tab you can easily assign a role for this user.



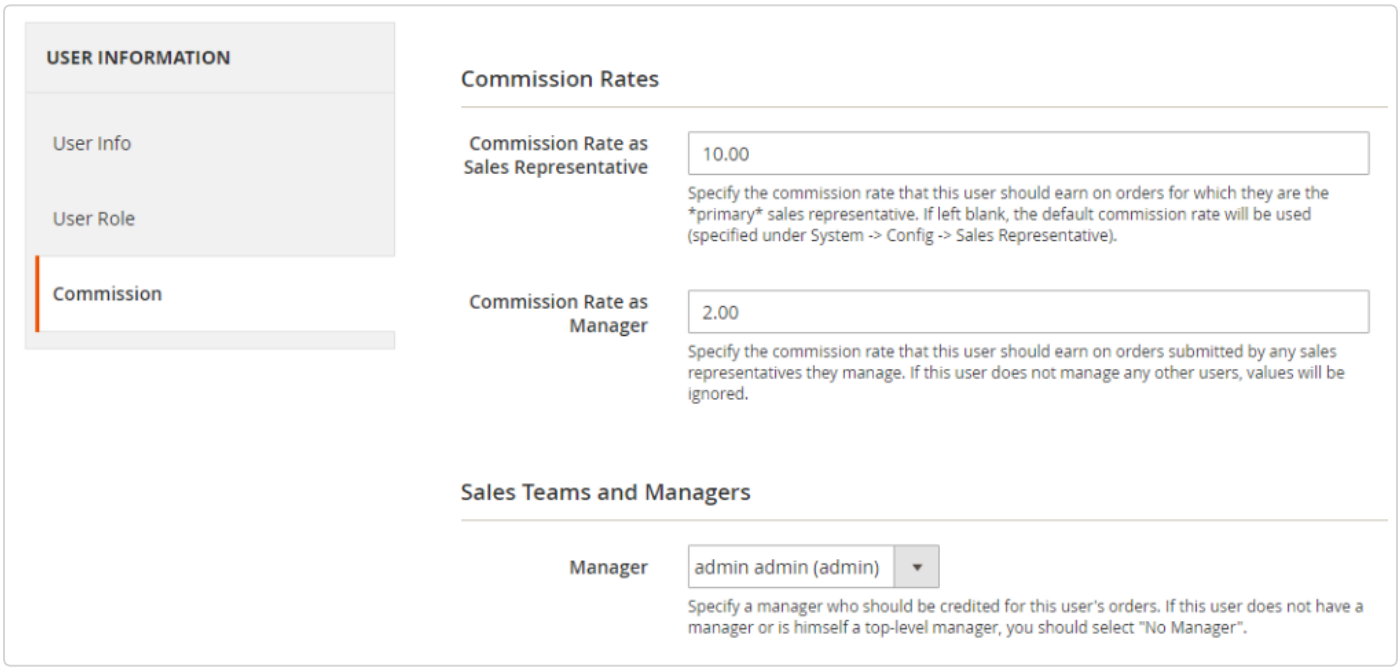
Commission

in this section you can set the custom commission rates (Manager and Sales Rep) for that user and select a manager for this user from the list of active users.

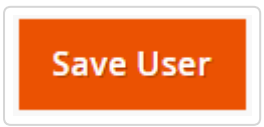
Commission Rate as Sales Representative	{Text Field}	Any values input (including 0) in the Commission fields will override the defaults you have set in the Configuration step. If you leave these fields blank, the defaults will be used.

Commission Rate as Manager	{Text Field}	Any values input (including 0) in the Commission fields will override the defaults you have set in the Configuration step. If you leave these fields blank, the defaults will be used.
Manager	{Selection Field of Users}	Here you are able to specify a manager who should be credited for this user's orders. If this user does not have a manager or is himself a top-level manager, you should select “No Manager.”

For more detailed explanation, please read the italic text below each of the fields as shown below.



Finally, remember to click the button ' **Save User**'!



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Sales Rep Magento 2 - Products

Commission per individual products

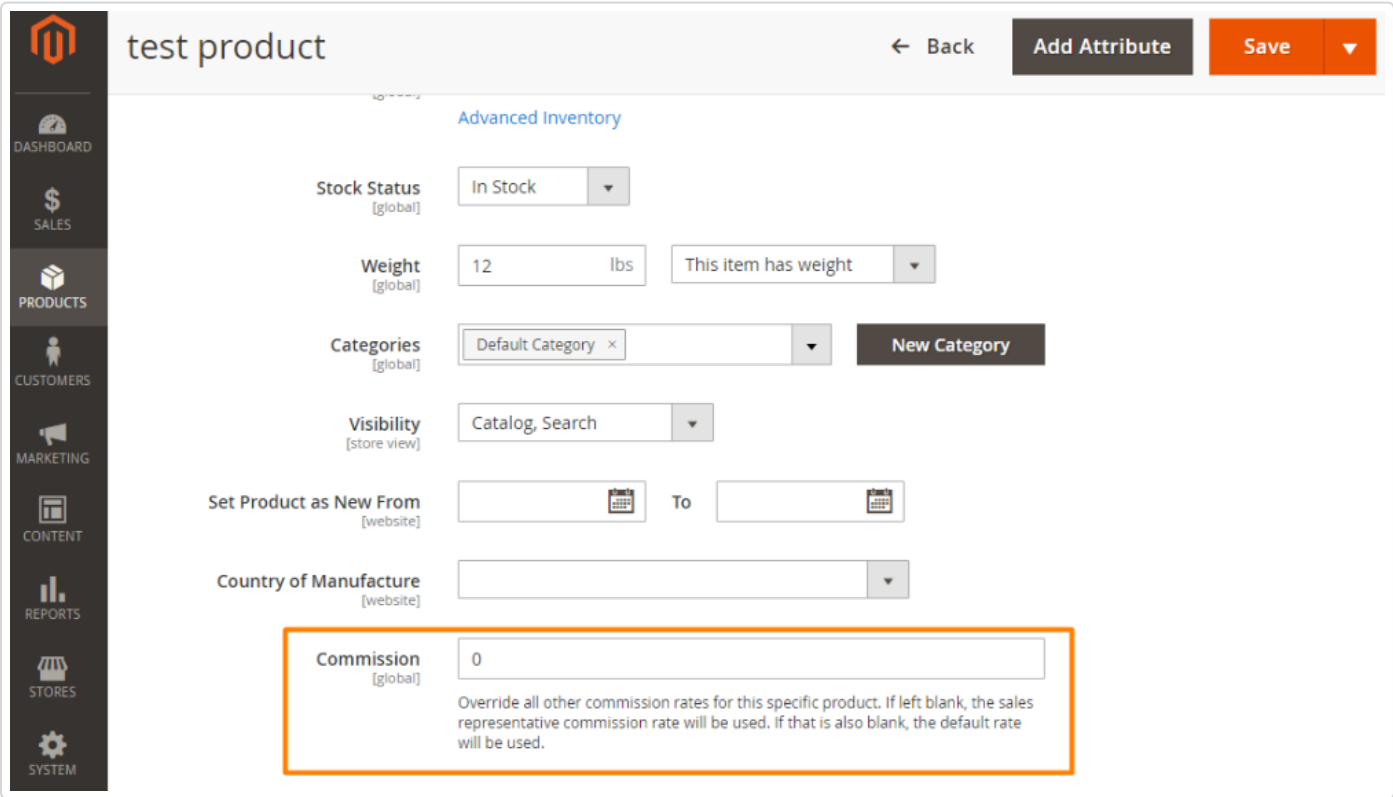
With the Sales Rep Commission Manager Extension is possible to assign specific commission rates to individual products.

This allows you to incentive representatives to sell particularly profitable products (either permanently or temporarily) and also prevents you from losing money on products with tight margins.

Once a commission rate is changed, past orders will not be affected.

If you do not wish for a product to have a special commission rate, you can simply leave it blank and the default commission rate will be used.

In order to apply the commission for an individual product, please go to **PRODUCTS** → **Catalog,** select the product you wish to modify and input the custom commission rate you wish to use on the '***Commissions***' field.



Finally, remember to click the button **Save** to apply your changes.

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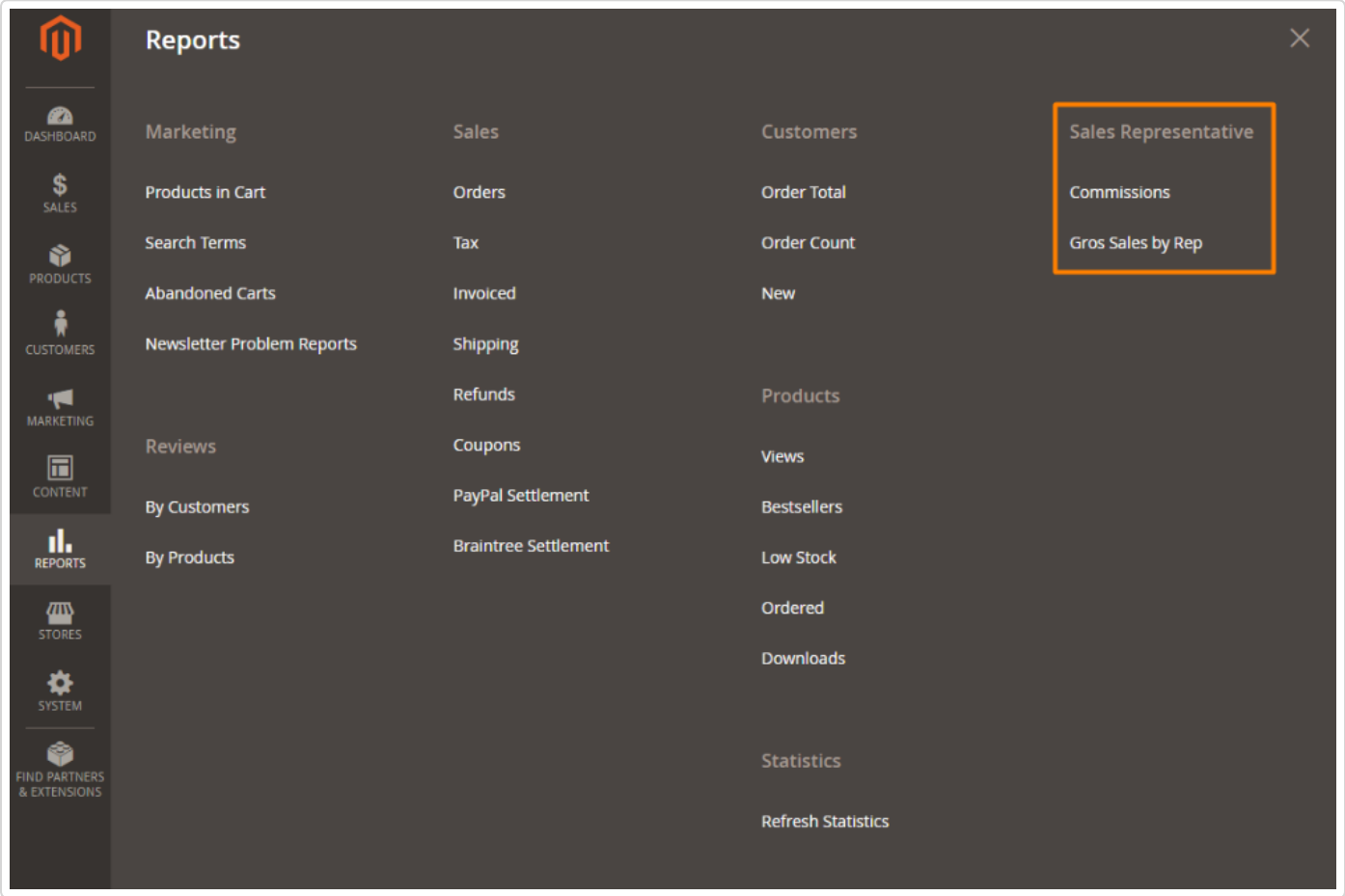
- Sales Rep Magento 2 - Configuration (/article/1210-sales-rep-magento-2-configuration)
- Sales Rep Magento 2 - Orders (/article/1211-sales-rep-magento-2-orders)

Sales Rep Magento 2 - Reports

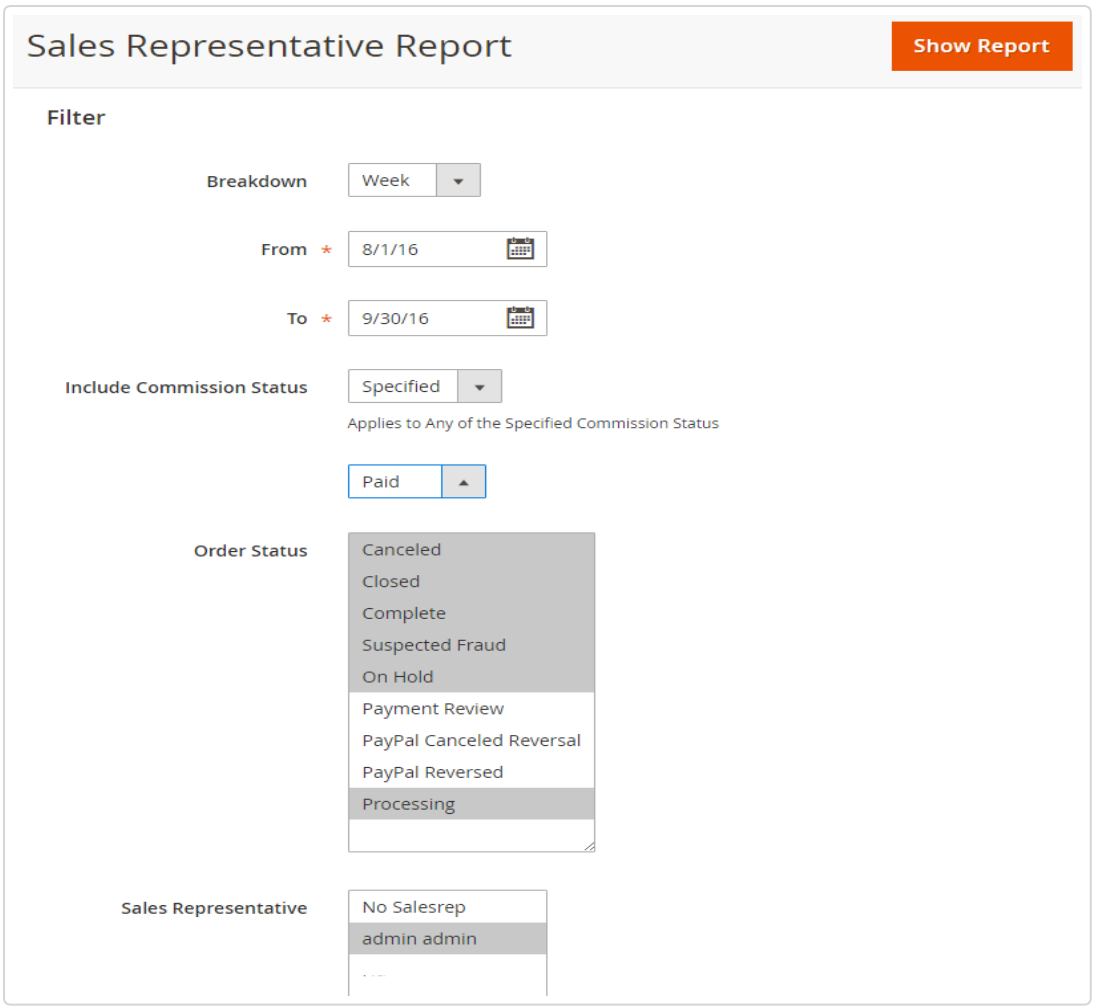
Reports

In order to access reports on your Sales team, please go to **REPORTS** → **Sales Representative** and choose between *Commissions* and *Gross Sales by Rep* reporting.



Commissions

The commissions report is a little bit more complicated, due to the fact that you can actually change information (in bulk) from within it.



All information is shown in the same report, in order to give you a complete picture of both Managers and their teams in one glance.

For this reason, it’s necessary to designate between a Manager’s own sales and those of his employees.

Orders submitted by Managers themselves will appear as normal. However, orders submitted by a Managers’ team member will appear under that Managers’ column with (M) after it.

	[redacted]	admin admin	No Sales Rep.
08/01/2016 - 08/07/2016	-	-	-
	Orders:0 Subtotal: $0.00	Orders:0 Subtotal: $0.00	
08/08/2016 - 08/14/2016	-	-	-
	Orders:0 Subtotal: $0.00	Orders:0 Subtotal: $0.00	
08/15/2016 - 08/21/2016	-	-	-
	Orders:0 Subtotal: $0.00	Orders:0 Subtotal: $0.00	
08/22/2016 - 08/28/2016	-	-	-
	Orders:0 Subtotal: $0.00	Orders:0 Subtotal: $0.00	
08/29/2016 - 09/04/2016	-	-	-
	Orders:0 Subtotal: $0.00	Orders:0 Subtotal: $0.00	
09/05/2016 - 09/11/2016	000000018 $12.30	000000004 $18.45 000000005 $18.45 000000013 $18.45 000000015 $18.45 000000017 $18.45	000000001 000000002 000000003 000000006 000000007 000000008 000000009 000000010 000000011 000000012 000000014 000000016
	Orders:1 Subtotal: $12.30	Orders:5 Subtotal: $92.25	
09/12/2016 - 09/18/2016	000000019 $12.30	-	-
	Orders:1 Subtotal: $12.30	Orders:0 Subtotal: $0.00	
09/19/2016 - 09/25/2016	000000020 $24.60 000000021 $12.30	000000021 (M) $24.60 000000022 $18.45 000000022 (M) $24.60	-
	Orders:2 Subtotal: $36.90	Orders:3 Subtotal: $67.65	
09/26/2016 - 10/02/2016	-	-	-
	Orders:0 Subtotal: $0.00 Orders: 0 Subtotal: $0.00	Orders:0 Subtotal: $0.00 Orders: 0 Subtotal: $0.00	
	change selected to:	change selected to:	
	Paid Total: $0.00 Unpaid Total: $61.50	Paid Total: $0.00 Unpaid Total: $159.90	

We strongly recommend paying commissions based on the period in which you accept returns. This prevents you from paying commission on an order that is later cancelled. For example, if you accept returns for 30 days, generate this report at the end of a 30 day period. Make sure to diligently mark any canceled or returned orders as such.

As before, you have breakdown and date range options, as well as the order status inclusion, so that you can run reports and generate commissions only for completed orders, if you like.

In this report, however, you can also choose to generate reports only for PAID or UNPAID commission statuses, which can be extremely helpful.

If you choose not to specify, however, the two totals will still be separated at the bottom of the report:

01/01/2014 - 12/31/2014	145000003 (M) $18.00	145000003 $36.00
	Orders: 1 Subtotal: $18.00	Orders: 1 Subtotal: $36.00
	change selected to:	change selected to:
	Paid Total: $58.70 Unpaid Total: $104.95	Paid Total: $114.50 Unpaid Total: $208.40

You may also notice a "*change selected to*" dropdown. This is the fastest and most effective way to change an order's commission payment status.

09/26/2016 - 10/02/2016	-	-
	Orders:0 Subtotal: $0.00 Orders: 0 Subtotal: $0.00	Orders:0 Subtotal: $0.00 Orders: 0 Subtotal: $0.00
	change selected to:	change selected to:
	Paid Total: Unpaid Total:	Paid Total: $0.00 Unpaid Total: $159.90

Unpaid
Paid
Ineligible
Canceled

When doing this in bulk, you should probably take care to uncheck “ *ineligible*” or “*canceled*” orders from the selection, unless you don’t mind about the future “*paid total*” being inaccurate.

Gross Sales By Rep

This report is fairly basic, in that it only shows the bottom line sales of a report, without any consideration for subtotals, totals, or commissions. It is meant to show you raw performance numbers.

For this reason, it is especially important to use the “Include Order Status” selection if you wish to get more specific information.

You may not, for example, count an order towards an employee’s quota if payment has yet to come in.

Conversely, you may want to run a report to see how many orders are being returned, to see if an employee is perhaps being too pushy with your customers.

As with both our reports, you are able to specify the breakdown to determine how many subtotals you would like to see, as well as a time period.

	[redacted]		admin admin		No Sales Rep.	
08/01/2016 - 08/31/2016	-		-		-	
	Orders:0	Subtotal: $0.00	Orders:0	Subtotal: $0.00	Orders:0	Subtotal: $0.00
09/01/2016 - 09/30/2016	000000018	$12.30	000000004	$18.45	000000001	$0.00
	000000019	$12.30	000000005	$18.45	000000002	$0.00
	000000020	$24.60	000000013	$18.45	000000003	$0.00
	000000021	$12.30	000000015	$18.45	000000006	$0.00
			000000017	$18.45	000000007	$0.00
			000000021 (M)	$24.60	000000008	$0.00
			000000022	$18.45	000000009	$0.00
			000000022 (M)	$24.60	000000010	$0.00
					000000011	$0.00
					000000012	$0.00
					000000014	$0.00
					000000016	$0.00
	Orders:4	Subtotal: $61.50	Orders:8	Subtotal: $159.90	Orders:12	Subtotal: $0.00
	Grand Total: $61.50		Grand Total: $159.90		Grand Total: $0.00	

Get more information about the **Sales Representative Commission Manager Extension** (https://www.cminds.com/ecommerce-extensions-store/sales-representative-commission-manager-extension-for-magento-2/#description/) for Magento® 2.

Find other Magento products at the **CreativeMinds Magento Store (https://www.cminds.com/ecommerce-extensions-store/).**

Let us know how we can **Improve this Product Documentation Page (https://www.cminds.com/support-documentation-feedback/).**

To open a **Support Ticket** (https://www.cminds.com/httpsecommerce-cminds-comcm-support/) visit our support center.

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RELATED SUPPORT DOCUMENTS

- Sales Rep Magento 2 - Configuration (/article/1210-sales-rep-magento-2-configuration)
- Sales Rep Magento 2 - Orders (/article/1211-sales-rep-magento-2-orders)