

IWD AGENCY

Sales Representative Tracking

User Guide

IMPORTANT

[IWD_All](#) plugin must be installed in order for this extension to work correctly.

If your store already has IWD_All installed, you may proceed to installing this extension.

[DOWNLOAD IWD_ALL](#)

WELCOME TO IWD'S SALES REPRESENTATIVE TRACKING

TABLE OF CONTENTS

[CONFIGURING SALES REPRESENTATIVE](#)

[AUTOMATIC / MANUAL MODES](#)

[CREATE A NEW SALES REPRESENTATIVE](#)

[CUSTOMIZE SALES REPRESENTATIVES](#)

[SALES REPRESENTATIVE ORDER REPORTS](#)

[SALES REPRESENTATIVE PRODUCT REPORTS](#)

[UPDATING EXTENSION](#)

[UNINSTALLING EXTENSION](#)

[COMMON ISSUES DURING INSTALLATION & USAGE](#)

[CONTACT SUPPORT](#)

CONFIGURING SALES REPRESENTATIVE

1. Go to **Admin Panel** → **System** → **Configuration** → **Sales Representative**
2. You can customize the extension by completing the fields listed below:

Global

Version	Current version of extension
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Orders and Representatives

Show Field In Order Grid?	Enables the Sales Rep. column in the order grid
Don't Show For Specified Users	Specify which Admin Users to not show in the order grid.
Disable Ability to Change Sales Rep	Specify if assigned sales reps for an order can be changed
Restrict Editing to Specific User Role	The selected user role will be able to: see orders, invoices that are assigned to all sales reps, able to re-assign orders

Orders Created in Magento Admin

Assign Sales Rep When Creating Order?	Choose to assign Sales Rep. when placing order.
Manually or Automatically Assign?	Choose between Manual and Automatic Assignment. (See Below)

Orders Created by Customers

Assign Sales Rep When Order is Placed?	Choose to automatically assign orders to a sales rep if all products within the order are assigned to the sales rep
Assign Sales Rep by Customers?	Choose to automatically assign orders to a sales rep if the customer's account is assigned to the sale rep
Assign Order to Special Representative	Assign representative to order when it is created by a customer

Email Options

Email Template to Notify Sales Rep	Select the email template used to notify sales reps of a new order
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AUTOMATIC / MANUAL MODES

- When in Automatic mode, the sales representative that is logged into the Magento admin panel will be the user assigned to the order.
- Manual mode allows the user to specify which sales representative to assign, regardless which user is logged in.

CREATE A NEW SALES REPRESENTATIVE

1. To add a new Sales Rep, you will need to create a new admin user by going to **Admin Panel**
-> **Systems** -> **Permissions** -> **Users**
2. Select **"Add New Use"** and complete all necessary information

New User

Account Information

User Name *

First Name *

Last Name *

Email *

Password *

Password Confirmation *

This account is ▾

4. Once done, select **"Save User"** in order to complete creating a new admin user account / sales rep

CUSTOMIZE SALES REPRESENTATIVES

1. In the admin panel, go to **Sales -> Sales Representatives**
2. Select a sales representative to edit
3. In the **Settings** tab, specify the following:

User Details

Admin Name	Current Magento Admin username
Display Name	Name that will appear on orders
Highlight	Assign a color for this sales rep
Notify User after Order Assigned	If 'Yes' then sales rep will receive an email notification once assigned to an order

Product Rate

Rate Type	Specify if this sales rep's commission will be a fixed amount or a percent of the product's price
% Per Sold Product / \$ Per Sold Product	Enter the specific value used to determine commission for the sales rep once a product is sold
Use Global Rate Only	Disable ability to setup free per specific product

Order Rate

Rate Type	Specify if this sales rep's commission will be a fixed amount or a percent of the total order amount
% per Order / \$ per Order	Enter the specific value used to determine commission for the sales rep for an order

Report Notification

Order Report	Specify how often an emailed report will be sent with commission per orders placed
Product Report	Specify how often an emailed report will be sent with commission per products sold

Customers

Limit by Customer	Specify if this specific sales rep will have customer limitations
Limit in Grid	Select if this specific sales rep will be able to be assigned to: Orders, Customer Accounts, Invoices, and Shipments
Auto Assign User to Representative	If 'Yes' then when a new customer account is created from Magento Admin then it will be assigned to this sales rep

4. In the **Products** tab, select which products will be associated with this sales rep
5. In the **Customers** tab, select which customer accounts will be associated with this sales rep

SALES REPRESENTATIVE ORDER REPORTS

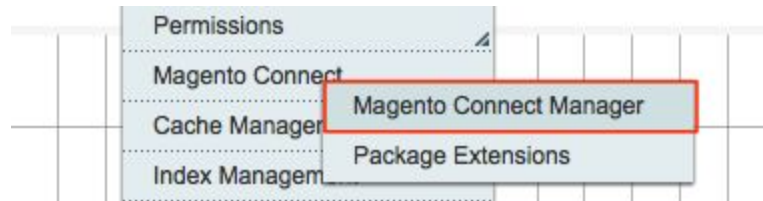
1. Go to **Reports -> Sales Representative -> Orders**
2. Select what date range to report, and order status.
3. Select sales representative
4. Select "Show Report"
5. If you wish to export the report data, select "Export to csv"

SALES REPRESENTATIVE PRODUCT REPORTS

1. Go to **Reports -> Sales Representative -> Product**
2. Select what date range to report, and order status.
3. Select sales representative
4. Select "Show Report"
5. If you wish to export the report data, select "Export to csv"

UPDATING EXTENSION

1. To update your extension to the latest version, please log-in to your Magento Admin Panel
2. Go to **System** → **Magento Connect** → **Magento Connect Manager**



3. Enter your Magento Connect Manager username and password

Log In

Please re-enter your Magento Administration Credentials.
Only administrators with full permissions will be able to log in.

Username:

Password:

[Log In](#)

4. Locate the extension you wish to update in the **Magento Existing Extensions** section.
5. Select **Uninstall** in the column **Actions**.

Manage Existing Extensions
[Check for Upgrades](#)

Channel: **Magento Community Edition** [Commit Changes](#)

Clear all sessions after successful install or upgrade:

Package Name	Installed	Actions	Summary
IWD_All	1.0.1 (stable)	▼	IWD All
IWD_Tooltips	1.0.0.0 (stable)	▼	Tooltips
IWD_AddressVerification	1.0.1 (devel)	▼	IWD's Address Verification Module allow to validate addresses in the checkout process.
IWD_ProductVideo	1.0.2 (stable)	▼	This module allow attaching video for products
IWD_AlsoBought	1.0.0.0 (stable)	▼	Who bought this also bought (first stable version)
IWD_OrderManager	1.2.0.1 (stable)	Uninsta ▼	Order Manager (second stable version)
IWD_InfinityScroll	1.0.0.0 (stable)	▼	AJAX infinity scroll

[Commit Changes](#)

6. Click on **Commit Changes** and for the extension to be successfully removed.

1. Under the **Direct package file upload** section, select the **Choose File** button.

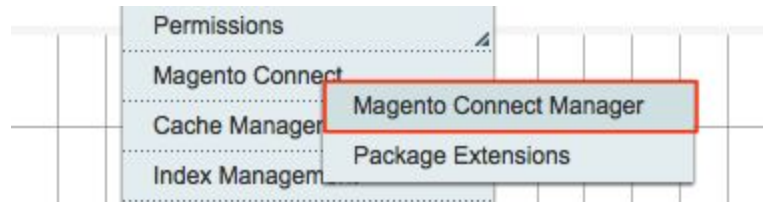
2. Select the extension file and click Upload.
3. Click on **Return to Admin**
4. Go to **System** → **Cache Management** → **Flush Magento Cache**



5. Log-out and log back into your Admin panel to complete installation

UNINSTALLING EXTENSION

1. To uninstall this extension, please log-in to your Magento Admin Panel
2. Go to **System** → **Magento Connect** → **Magento Connect Manager**



3. Enter your Magento Connect Manager username and password

Log In

Please re-enter your Magento Administration Credentials.
Only administrators with full permissions will be able to log in.

Username:

Password:

[Log In](#)

4. Locate the extension you are uninstalling in the Magento Existing Extensions section
5. Select **Uninstall** in the column **Actions**.

Manage Existing Extensions
[Check for Upgrades](#)

Channel: Magento Community Edition [Commit Changes](#)

Clear all sessions after successful install or upgrade:

Package Name	Installed	Actions	Summary
IWD_All	1.0.1 (stable)	▼	IWD All
IWD_Tooltips	1.0.0.0 (stable)	▼	Tooltips
IWD_AddressVerification	1.0.1 (devel)	▼	IWD's Address Verification Module allow to validate addresses in the checkout process.
IWD_ProductVideo	1.0.2 (stable)	▼	This module allow attaching video for products
IWD_AlsoBought	1.0.0.0 (stable)	▼	Who bought this also bought (first stable version)
IWD_OrderManager	1.2.0.1 (stable)	Uninstall ▼	Order Manager (second stable version)
IWD_InfinityScroll	1.0.0.0 (stable)	▼	AJAX infinity scroll

[Commit Changes](#)

6. Click on **Commit Changes** and for the extension to be successfully removed.
7. Click on **Return to Admin**
8. Go to **System** → **Cache Management** → **Flush Magento Cache**



COMMON ISSUES DURING INSTALLATION & USAGE

To resolve issues that commonly occur during installation or usage, please review this document: [Common Issues](#).

CONTACT SUPPORT

Thank you for purchasing IWD's Sales Representative Tracking. If you experience any problems with installing this extension, please contact our support team. If you have a moment, please review this extension. If you would like IWD's certified Magento developers to install this extension, please contact our support team to receive an estimate.

[REVIEW THIS EXTENSION](#)[CONTACT SUPPORT](#)