



Sales Agent

Extension User Guide

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Sales Agent

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Contents

Sales Agent	3
1. Configuration	4
1.1 Manage Agents	5
1.2 Create New Agent from Frontend.....	6
1.3 To access the Magento backend Sales Agent environment	7
1.4 Manage customers	8
1.4.1 Create New Customers	8
1.5 Manage Agent commission.....	9
1.5.1 Order Commission	10
1.5.2 Withdrawal requests.....	10
1.6 Manage Accounts.....	11

Sales Agent

Overview

The Sales agent extension helps to monitor and increase the sales for your store by appointing agents to bring up sales. This extension will help to make agents who in turn will get customers for your store which will increase the store orders and revenue. These agents can create and manage their customers and orders put forth by them. They in turn will get a commission on each order on the basis of a commission percentage set by the Admin. This extension lets you manage access permissions to orders and customers for agents. The agents can view and edit only customers assigned to them; they can view and process orders only of their customers; they can create orders from their account only for their customers. Also, they can create new customers, who are automatically assigned to them. Agents can also request for withdrawal of their commission once they have a minimum commission amount in their account as set by Admin. This withdrawal request will further be approved by Admin using PayPal and will get credited to Agents account online. This extension gives you more control over order processing.

Features

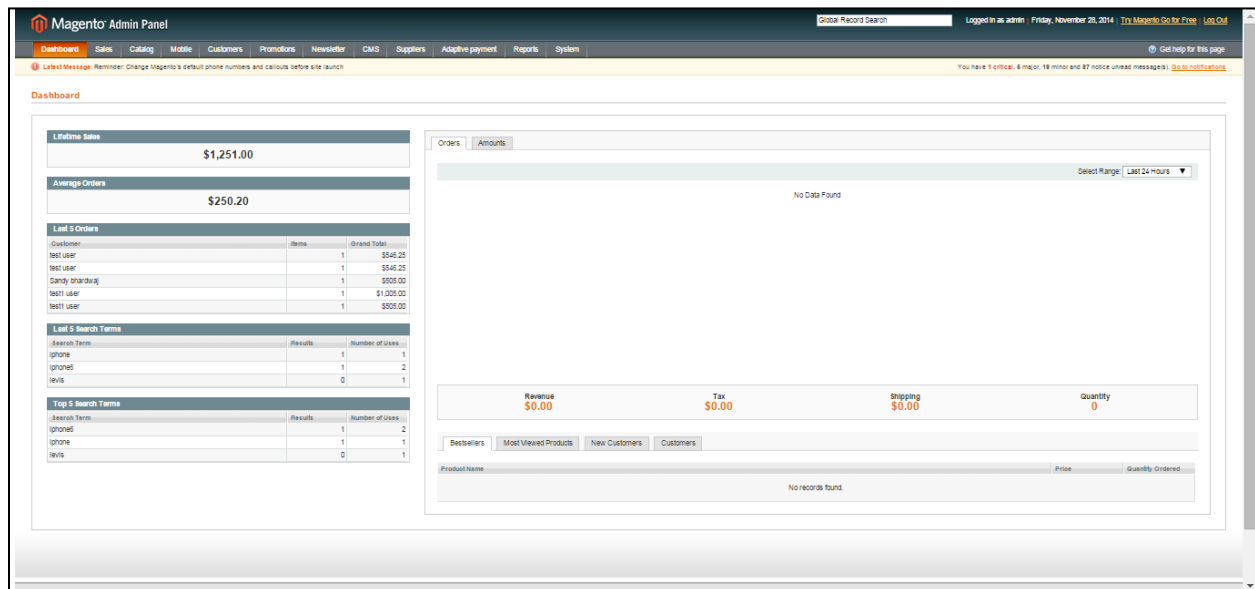
- Allow to create, view, edit and delete sales agents
- View orders for each sales agent
- Enable/disable front end registered agents
- Customizable and automated email reporting to agents and admin
- Allot a default commission percentage for agents
- Tabulate and compile commissions earning
- Track commission earning as Paid, Unpaid or Cancelled
- Customise commission percentage for each agent
- Set a minimum amount for commission withdrawal
- Manage and approve the commission earnings of agents
- See sales for any specified time period
- Show commission earning and status in each order
- Ensure that orders put in manually through your admin panel are also credited to the appropriate agent
- Create fun and motivational sales competitions within your company

1. Configuration

To access the Magento backend administration environment



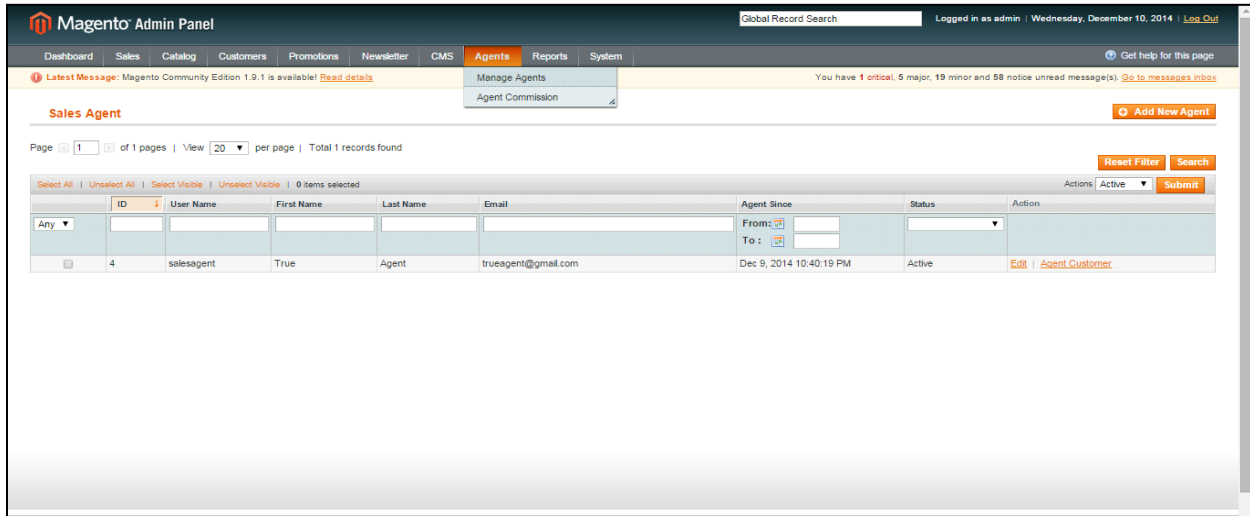
a) Log in using the user name and password



b) Click the login button to display the administration panel

1.1 Manage Agents

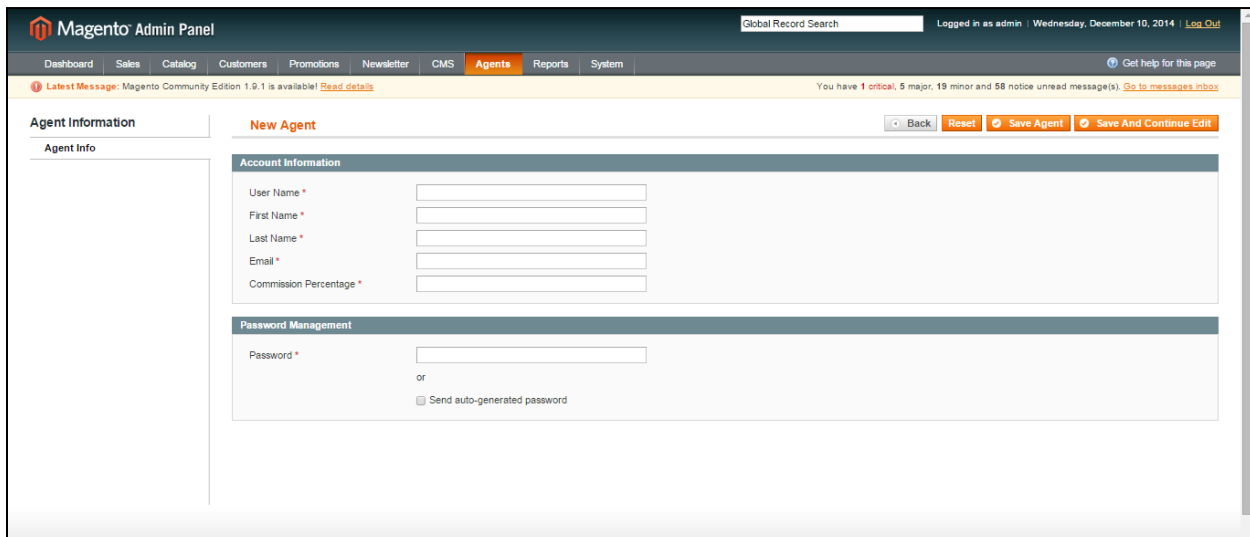
You can access following the path **Agents > Manage Agents**



The screenshot shows the 'Manage Agents' interface in the Magento Admin Panel. At the top, there's a navigation bar with 'Agents' selected. Below it, a message banner indicates 'You have 1 critical, 5 major, 19 minor and 58 notice unread message(s)'. The main content area is titled 'Sales Agent' and includes a '+ Add New Agent' button. A table lists agent records with the following data:

ID	User Name	First Name	Last Name	Email	Agent Since	Status	Action
4	salesagent	True	Agent	trueeagent@gmail.com	Dec 9, 2014 10:40:19 PM	Active	Edit Agent Customer

- **Edit:** Admin can edit the agent information
- **Agent Customer:** It will display the customers under each agent
- **Actions:** Admin can perform actions such as active ,inactive, and delete the registered agents from the list
- **Search:** Search the agents on basis of User name, First name, last name, email etc
- **Add New Agent:** Add a new agent from admin area



The screenshot shows the 'New Agent' form in the Magento Admin Panel. The form is divided into two main sections: 'Account Information' and 'Password Management'. The 'Account Information' section contains the following fields:

- User Name *
- First Name *
- Last Name *
- Email *
- Commission Percentage *

The 'Password Management' section contains the following fields:

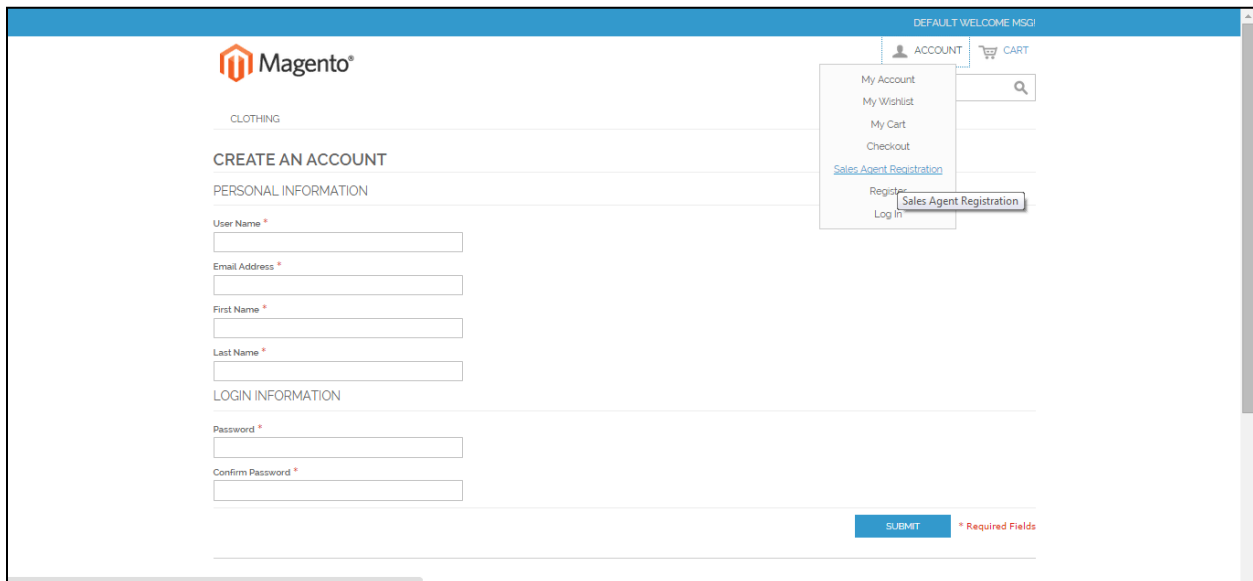
- Password *
- or
- Send auto-generated password

General Tabs

- **Enter Agent Details**
 - Username
 - First Name
 - Last Name
 - Email
 - Commission percentage agent will receive
 - Sign in password
 - Save to create Agent account

1.2 Create New Agent from Frontend

- Enter the URL
- Select from **Account > Sales Agent Registration** in frontend



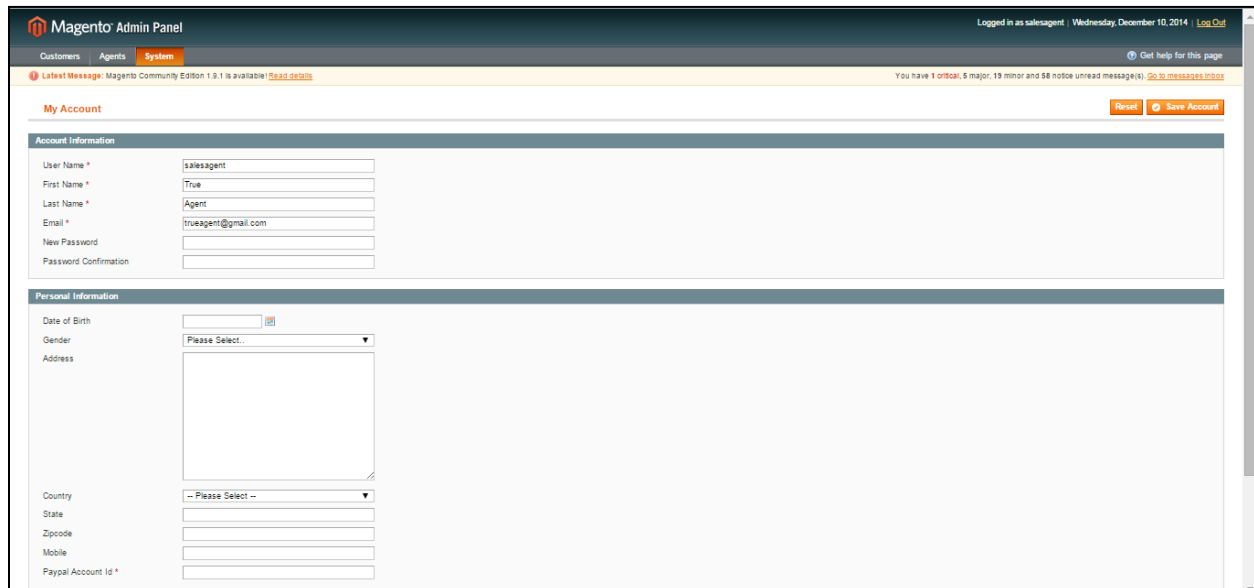
General Tabs

- **Enter Agent Details**
 - Username
 - First Name
 - Last Name
 - Email
 - Commission percentage agent will receive
 - Sign in password
 - Confirm Password
 - Save to create Agent account

1.3 To access the Magento backend Sales Agent environment



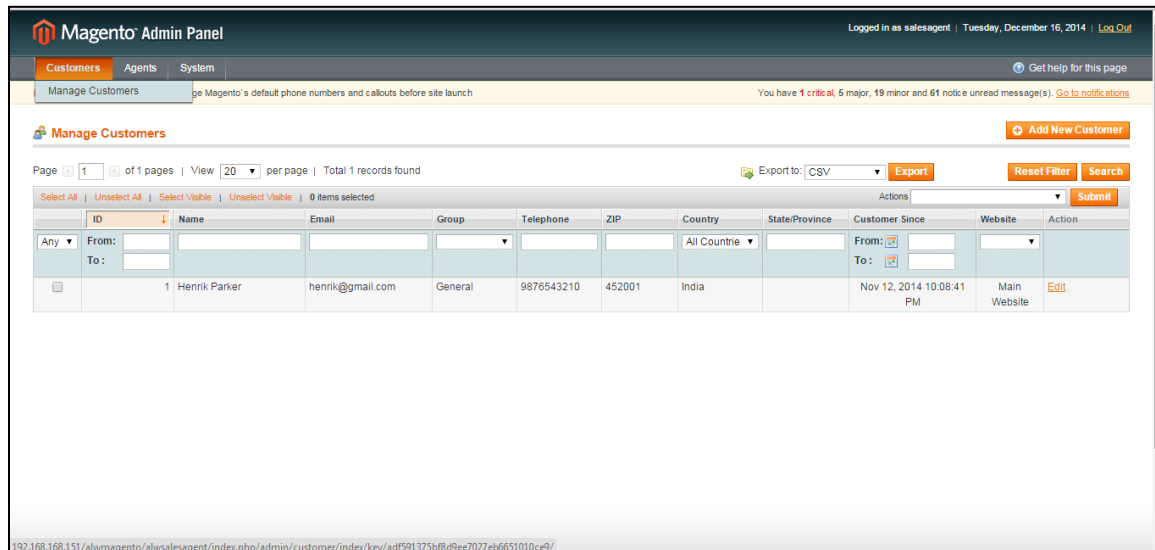
a) Log in using the user name and password of sales agent



b) Click the login button to display the agent backend

1.4 Manage customers

You can access following the path **Customers > Manage customers**



Magento Admin Panel | Logged in as salesagent | Tuesday, December 16, 2014 | Log Out

Customers Agents System | Get help for this page

Manage Customers | Manage Magento's default phone numbers and callouts before site launch | You have 1 critical, 5 major, 19 minor and 61 notice unread message(s). [Go to notifications](#)

Manage Customers | Add New Customer

Page 1 of 1 pages | View 20 per page | Total 1 records found | Export to: CSV | Export | Reset Filter | Search

Select All | Unselect All | Select Visible | Unselect Visible | 0 items selected | Actions | Submit

ID	Name	Email	Group	Telephone	ZIP	Country	State/Province	Customer Since	Website	Action
1	Henrik Parker	henrik@gmail.com	General	9876543210	452001	India		Nov 12, 2014 10:08:41 PM	Main Website	Edit

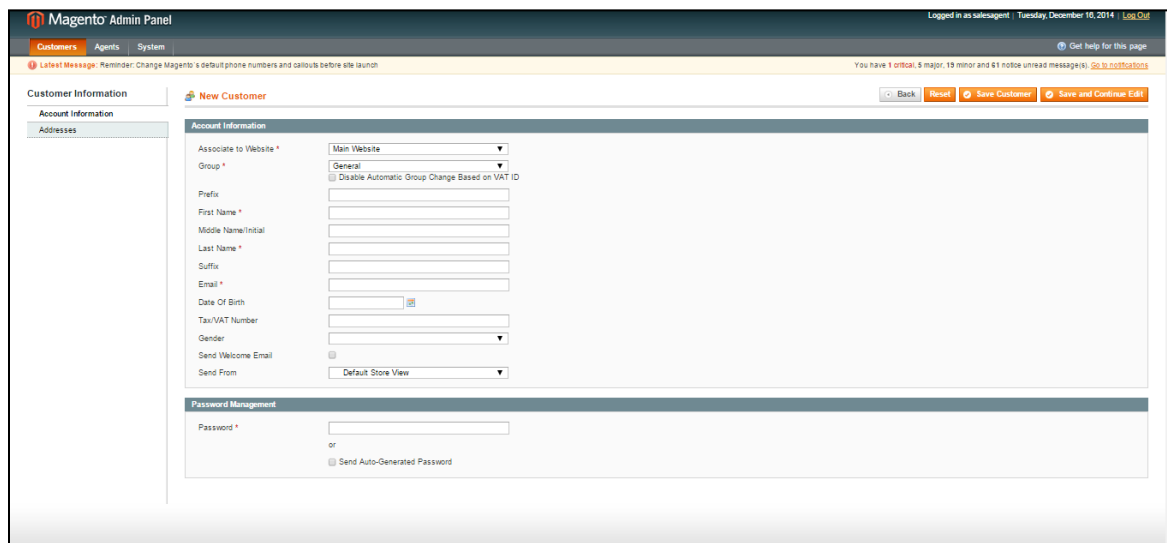
192.168.168.151/almagento/almwsalesagent/index.php/admin/customer/index/key/adf591375b8d9ee7027eb6651010ce3/

- A list of already created customers will be displayed
- **Edit:** To update the customer information

1.4.1 Create New Customers

- Click to add new customer

Fill Account Information



Magento Admin Panel | Logged in as salesagent | Tuesday, December 16, 2014 | Log Out

Customers Agents System | Get help for this page

Latest Message: Reminder: Change Magento's default phone numbers and callouts before site launch | You have 1 critical, 5 major, 19 minor and 61 notice unread message(s). [Go to notifications](#)

New Customer | Back | Reset | Save Customer | Save and Continue Edit

Customer Information

Account Information

Addresses

Account Information

Associate to Website * | Main Website

Group * | General

Disable Automatic Group Change Based on VAT ID

Prefix

First Name *

Middle Name/Initial

Last Name *

Suffix

Email *

Date Of Birth

Tax/VAT Number

Gender

Send Welcome Email

Send From | Default Store View

Password Management

Password *

or

Send Auto-Generated Password

General Tabs

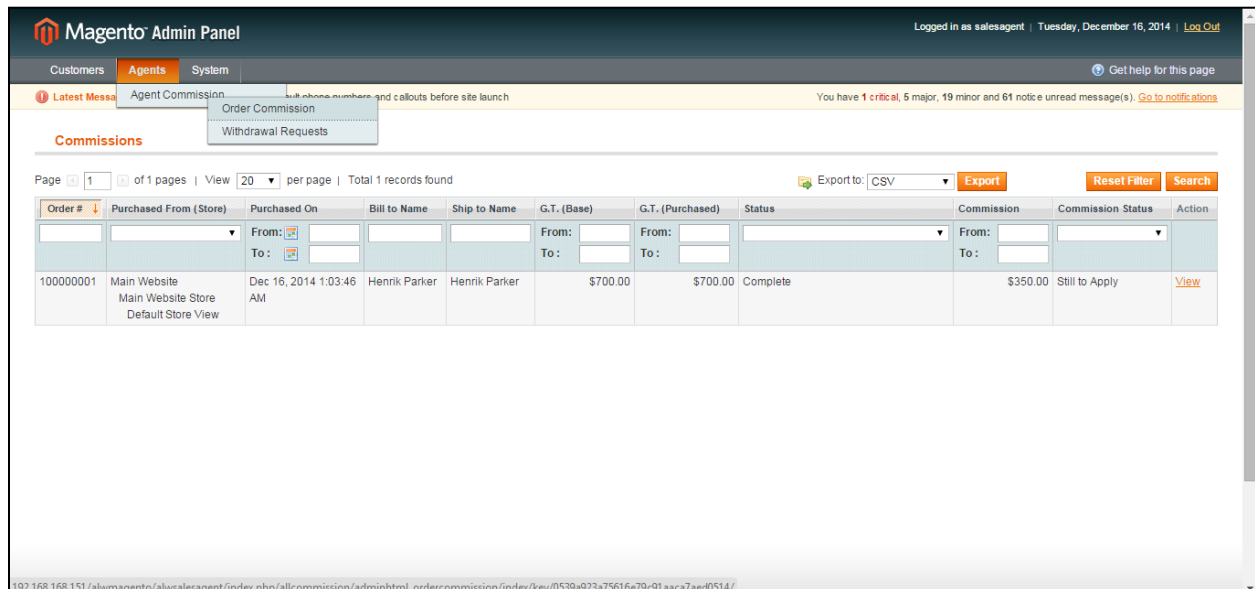
- **Associate to website:** Select the website from dropdown
- **General:** Select from dropdown the group

Enter customer details

- Prefix
- First Name
- Middle Name/Initial
- Last name
- Suffix
- Email
- Date of Birth
- Tax/Vat Number
- Gender
- Send Welcome Email
- Send From
- Password

1.5 Manage Agent commission

You can access manage agent commission from **Agents > Agent commission**



Magento Admin Panel | Logged in as salesagent | Tuesday, December 16, 2014 | Log Out

Customers Agents System | Get help for this page

Latest Messages | Agent Commission | Order Commission | Withdrawal Requests | You have 1 critical, 5 major, 19 minor and 61 notice unread message(s). [Go to notifications](#)

Commissions

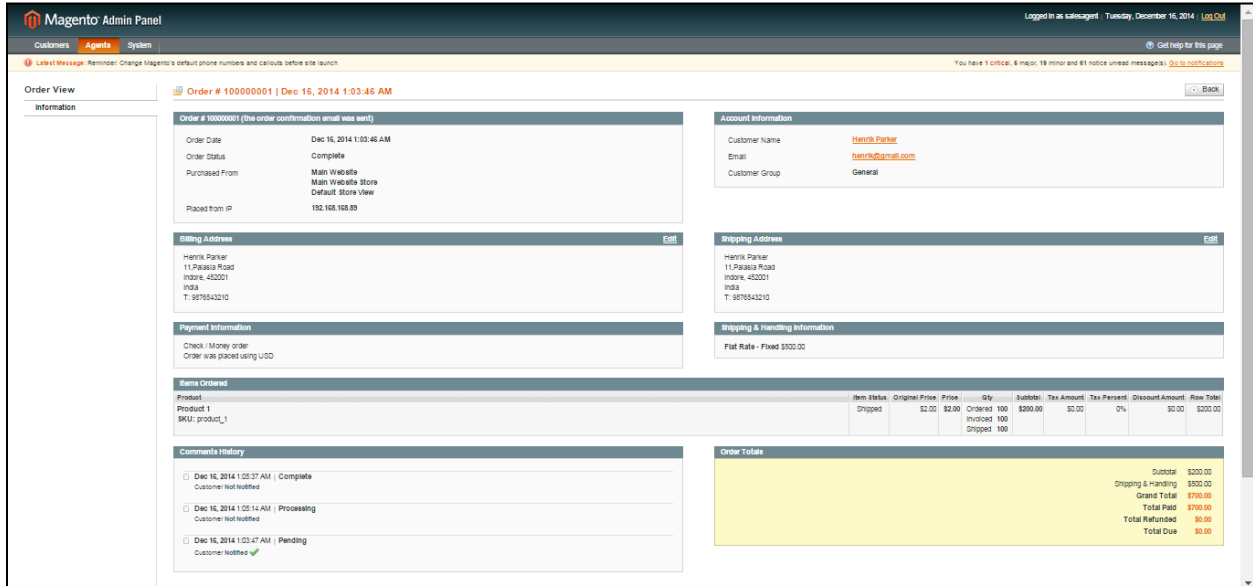
Page 1 of 1 pages | View 20 per page | Total 1 records found | Export to: CSV | Export | Reset Filter | Search

Order #	Purchased From (Store)	Purchased On	Bill to Name	Ship to Name	G.T. (Base)	G.T. (Purchased)	Status	Commission	Commission Status	Action
100000001	Main Website Main Website Store Default Store View	Dec 16, 2014 1:03:46 AM	Henrik Parker	Henrik Parker	\$700.00	\$700.00	Complete	\$350.00	Still to Apply	View

192.168.168.151/abw/magento/abw/salesagent/index.php/allcommission/adminhtml_ordercommission/index/?ev/0539a923a75616e79c91aaca7aed0514/

1.5.1 Order Commission

- A list of orders will be displayed in this section, from where the agent has received some commission
- **View:** Agent can view each order

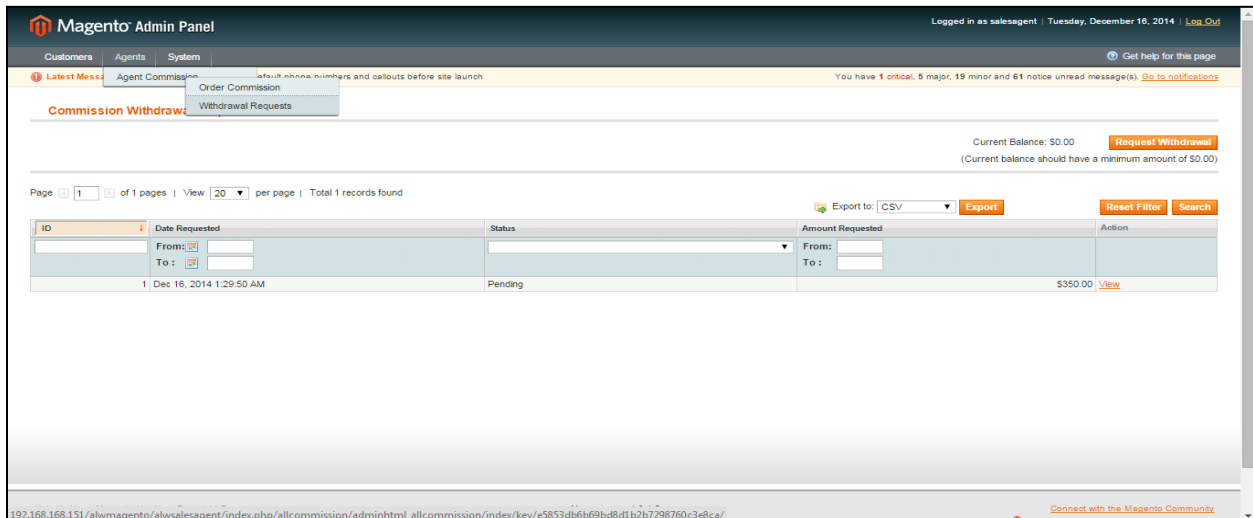


The screenshot displays the 'Order View' page in the Magento Admin Panel. The order details are as follows:

- Order # 100000001** (The order confirmation email was sent)
- Order Date:** Dec 16, 2014 1:03:46 AM
- Order Status:** Complete
- Purchased From:** Main Website Store, Default Store View
- Placed from IP:** 192.168.168.89
- Account Information:** Customer Name: Henrik Parker, Email: henrik@gmail.com, Customer Group: General
- Billing Address:** Henrik Parker, 11, Palasa Road, Indira Nagar, 40001, India, T: 9876543210
- Shipping Address:** Henrik Parker, 11, Palasa Road, Indira Nagar, 40001, India, T: 9876543210
- Payment Information:** Check / Money order, Order was placed using USD
- Items Ordered:** Product 1 (SKU: product_1) with a quantity of 100. Item status: Shipped. Original Price: \$2.00, Price: \$2.00. Subtotal: \$200.00, Tax Amount: \$0.00, Discount Amount: \$0.00, Row Total: \$200.00.
- Comments History:**
 - Dec 16, 2014 1:03:37 AM | Complete (Customer notified)
 - Dec 16, 2014 1:02:14 AM | Processing (Customer notified)
 - Dec 16, 2014 1:03:47 AM | Pending (Customer notified)
- Order Totals:**
 - Subtotal: \$200.00
 - Shipping & Handling: \$50.00
 - Grand Total: \$700.00
 - Total Paid: \$700.00
 - Total Refunded: \$0.00
 - Total Due: \$0.00

1.5.2 Withdrawal requests

- A list of commissions withdraw from admin will be visible
- **View:** Agent can view his requested commission



The screenshot displays the 'Commission Withdrawal Requests' page in the Magento Admin Panel. The current balance is \$0.00. A table shows one pending request:

ID	Date Requested	Status	Amount Requested	Action
1	Dec 16, 2014 1:29:50 AM	Pending	\$350.00	View

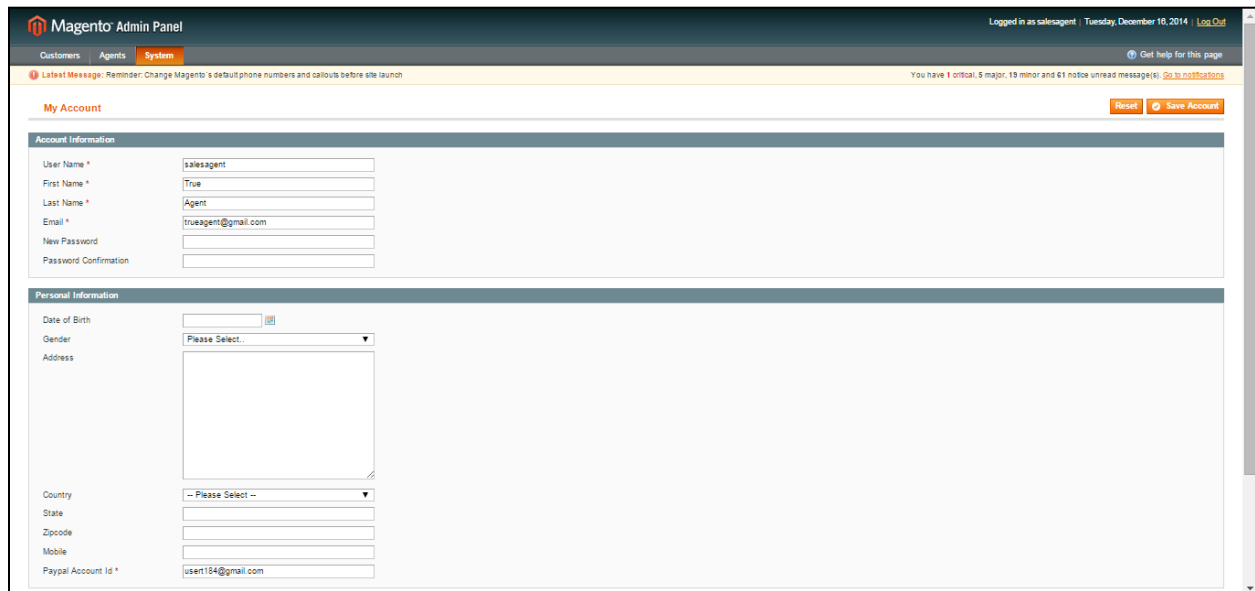
Page 1 of 1 pages | View 20 per page | Total 1 records found. Export to CSV | Export | Reset Filter | Search

General Tabs

- **Request withdraw tab:** You can request commission from admin
- **Current balance:** This will display the commission, agent has received till now

1.6 Manage Accounts

You can access Accounts from **system> my accounts**



My Account Reset Save Account

Account Information

User Name *

First Name *

Last Name *

Email *

New Password

Password Confirmation

Personal Information

Date of Birth

Gender

Address

Country

State

Zipcode

Mobile

Paypal Account Id *

General Tabs

- **Username:** Update the username of Agent
- **First Name:** Update the first name of Agent
- **Last Name:** Update the last name of Agent
- **Email:** Update the email address of Agent
- **Password:** Update the password by entering new and confirm password fields
- **Save:** Save the updated information