

Agents

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Overview

The Agents module extends the system for service providers who utilise the services other parties to sell their services on their behalf, such as in a franchisee arrangement, or a channel partner. Sales of products and services can be attributed to the relevant Agent so the service provider knows who sold which services and products.

This module is fully integrated with the [Commissions module](#), a further extension where commission is generated based on what the Agent sold. The Agents module can be used without the Commissions module, but the Commissions module cannot be used without Agents.

Managing Agents

If your company subscribes to Managing Agents, an extension of Agents, the agents themselves can log in to Cumulus in order to place orders for services and products and to perform basic account management functions but only to the customers who they sign up.

Licensing

This feature is available to subscribers of the following:

- ☐ Emersion Core
- ☒ Optional Modules
- ☐ Upon Request (please contact your Account Manager)

Features and How To's

This section contains articles on the various features and how to use them.

Core Features

- [Agent Fundamentals](#)

Training

- [Video Training](#)
- [Configuration Check list](#)

Prerequisites

Before attempting to use this module, users should:

- have a solid understanding of [Permissions](#), [Staff users](#), [Roles and Org Units](#).

Dependencies

In order to use this module, service providers must have:

- A retail service provider account. This module is not available to Wholesale service provider accounts.

Access Control

Module permissions and powers are used to control access to modules, Powers are used to control access to features of a module, functions, and page sections.

If you are unable to access a given feature and you have checked the permissions and powers, please contact **Emersion**.

Module Permissions

There are no module permissions needed to grant access to the module

Powers

Power	Description
Agent Management	Provides access to create agent accounts

What's in this section?

- [Managing Agents](#)
- [Core Features](#)
- [Training](#)

Acceptance Test

[Conduct an acceptance test for this module](#)

[What is this?](#)

Module Events

No events are included with the module.

Module Reports

The following reports are included in the module.

- [Commissions by Agent \(id: 981\)](#)

Related Articles

- [Agents Configuration Checklist](#)
- [Sign Up Portal URL String Options](#)
- [Accounts and Contacts](#)
- [Retail Package Catalogue](#)
- [Retail Package Catalogue Fundamentals](#)
- [Commissions on an Invoice](#)
- [Configure an Agent for Commissions](#)
- [Link a Commission Tier to an Agent](#)
- [Viewing my Commissions](#)
- [Agents](#)
- [Replace Payment Advice](#)
- [Invoice Layout Agent-Based](#)
- [Agent Fundamentals](#)
- [Show Agent-Based Receipts Since Last Invoice](#)
- [Show Agent-Based Current Month Sales](#)