Sales Staff Extension

PDF Manual

MODULE

staff

LAST UPDATED

2026-03-29

Table of Contents

Sales Staff Extension · staff

Overview

Sales Staff Extension · /staff

Welcome to the Sales Staff extension documentation. This comprehensive B2B solution enables dedicated sales representative accounts that can manage customers, place orders on their behalf, and earn commissions.

Quick Links

Getting Started

- Installation & Setup
- Configuration
- Create Your First Staff Account

Core Features

- Customer Assignment
- Customer Impersonation
- Commission System
- Frontend Customer Creation
- Staff Groups
- Order Management
- Reports & Analytics

Add-Ons

- API Integration
- Customer History
- Customer Visits
- GraphQL Integration
- Order Management
- Quote Management
- Quote Sample Data
- Two-Factor Authentication (if add-on installed)
- Import/Export
- Hyvä Compatibility
- SAML Single Sign-On
- Sample Data

Use Cases

- Field Sales Teams
- Inside Sales Operations
- Territory Management
- Customer Service

Troubleshooting

- Common Issues
- Email Configuration

Overview

The Sales Staff extension transforms your Magento store into a powerful B2B platform by enabling dedicated sales representative accounts. Sales staff can manage their customer portfolio, place orders on behalf of customers, and earn commissions - all through a separate frontend login system.

Core Concept

Separate Login System

Staff members have their own authentication system, completely separate from:

- Magento Admin (backend)
- Customer accounts (frontend)

This provides:

- **Security**: Staff credentials are isolated
- **Flexibility**: Different permissions and access levels
- **Scalability**: Unlimited staff accounts without admin licenses

Customer-Staff Relationship

The extension supports flexible customer assignment:

One-to-One: Each customer has one primary sales representative **Many-to-Many**: Customers can be assigned to multiple staff members **Access All**: Senior staff can access all customers

Commission-Based Compensation

Automatic commission calculation based on:

- Order totals (including or excluding tax)
- Product discounts
- Configurable percentages per staff member

Key Benefits

For Sales Teams

- Mobile-friendly frontend interface
- Quick customer search and access
- Order placement on behalf of customers
- Real-time commission tracking
- Customer notes and history

For Management

- Territory-based organization
- Performance tracking per staff/group
- Commission reports and analytics
- Customer assignment management
- Order filtering by staff

For Customers

- Dedicated sales representative
- Personalized service
- Quick order processing
- Custom pricing support

System Requirements

- Magento 2.4.6 - 2.4.8
- PHP 8.1 - 8.5

Add-Ons Available

Extend functionality with these powerful add-ons:

Core Add-Ons

- **Staff API**: Web API endpoints for integrations
- **Customer History**: Topic-based customer timeline with attachments
- **GraphQL Integration**: GraphQL support for headless/storefront integrations

Advanced Add-Ons

- **Order Management**: Staff order editing workflows with config controls
- **Quote Management**: Staff quote workflows with PDFs, reminders, attachments
- **Quote Sample Data**: Demo quote records for staging/testing
- **Two-Factor Authentication**: Enhanced security with 2FA (requires separate add-on installation)

Integration Add-Ons

- **Customer Visit**: Visit planning and calendar integration
- **Import/Export**: CSV export from admin grid + CLI import
- **Hyvä Compatibility**: Compatibility for Hyvä storefronts
- **SAML SSO**: Single sign-on for staff accounts
- **Sample Data**: Demo data for staff and quote workflows

Getting Help

If you get stuck, start here:

- Check Common Issues
- Verify your configuration in Configuration
- If you need support, open a ticket on the main site (Support is tied to your license/support status).

Next Steps

Ready to get started? Follow our installation guide:

Installation & Setup →

Installation

Sales Staff Extension · /staff/getting-started/installation

This guide walks you through installing and setting up the Sales Staff extension for Magento 2.

Prerequisites

Before installing, ensure you have:

- Magento with `magento/framework >=103.0.4`
- PHP `^8.1` with extensions: `intl`, `iconv`
- Composer access to MageB2B repository
- SSH/terminal access to your server
- Backup of your database and files

Installation Steps

1. Install via Composer

```
composer config bearer.repo.softwaresilo.io <token>
composer config repositories.softwaresilo composer
https://repo.softwaresilo.io/
composer require mageb2b/staff:*
```

2. Enable the Module

```
php bin/magento module:enable MageB2B_Staff
```

3. Run Setup Upgrade

```
php bin/magento setup:upgrade
```

This creates the required database tables:

- `customer_salesstaff` - Staff accounts
- `customer_salesstaff_customer` - Staff-customer relationships
- `customer_salesstaff_group` - Staff groups
- Adds columns to `sales_order`, `sales_order_grid`, and `quote`

4. Compile DI

```
php bin/magento setup:di:compile
```

5. Deploy Static Content

```
php bin/magento setup:static-content:deploy
```

6. Clear Cache

```
php bin/magento cache:flush
```

Verify Installation

Check Module Status

```
php bin/magento module:status MageB2B_Staff
```

Expected output:

```
Module is enabled
```

Check Database Tables

```
php bin/magento setup:db:status
```

Expected tables:

- customer_salesstaff
- customer_salesstaff_customer
- customer_salesstaff_group

Access Admin Configuration

Navigate to:

```
Stores > Configuration > MageB2B > Staff
```

If you see the configuration page, installation was successful!

Post-Installation Setup

1. Create Default Staff Group

Go to: **Staff > Staff Groups**

Click "Add New Group" and create:

- Name: "Sales Representatives"
- Save

2. Configure Basic Settings

Go to: **Stores > Configuration > MageB2B > Staff > General**

Set:

- **Session Lifetime**: Default is `900` seconds (adjust as needed)
- **Can customer have multiple staff**: Depends on your process (team-based vs. territory-based)
- **Default Staff Group**: Sales Representatives

3. Configure Email Settings

Go to: **Stores > Configuration > MageB2B > Staff > Email**

Set:

- **Email template new staff**: Staff New Account
- **Email template for staff activation**: Staff Activated
- **Email template for staff de-activation**: Staff Deactivated

4. Enable Frontend Links (Optional)

Go to: **Stores > Configuration > MageB2B > Staff > General**

Set:

- **Add footer link for staff signup**: Yes
- **Add footer link for staff login**: Yes

This adds links to your store footer for staff registration and login.

Optional Add-Ons

Install optional add-ons for extended functionality: Reporting is included directly in the Staff core feature set.

Staff API

```
composer config bearer.repo.softwaresilo.io <token>
composer config repositories.softwaresilo composer
https://repo.softwaresilo.io/
composer require mageb2b/staff-api:*
php bin/magento module:enable MageB2B_StaffApi
php bin/magento setup:upgrade
php bin/magento cache:flush
```

Customer History

```
composer config bearer.repo.softwaresilo.io <token>
composer config repositories.softwaresilo composer
https://repo.softwaresilo.io/
composer require mageb2b/staff-customerhistory:*
php bin/magento module:enable MageB2B_StaffCustomerHistory
php bin/magento setup:upgrade
php bin/magento cache:flush
```

Customer Visits

```
composer config bearer.repo.softwaresilo.io <token>
composer config repositories.softwaresilo composer
https://repo.softwaresilo.io/
composer require mageb2b/staff-customervisit:*
php bin/magento module:enable MageB2B_StaffCustomerVisit
php bin/magento setup:upgrade
php bin/magento cache:flush
```

Order Management (Order Editing)

```
composer config bearer.repo.softwaresilo.io <token>
composer config repositories.softwaresilo composer
https://repo.softwaresilo.io/
composer require mageb2b/staff-ordermanagement:*
php bin/magento module:enable MageB2B_StaffOrderManagement
php bin/magento setup:upgrade
php bin/magento cache:flush
```

Quotes

```
composer config bearer.repo.softwaresilo.io <token>
composer config repositories.softwaresilo composer
https://repo.softwaresilo.io/
composer require mageb2b/staff-quote:*
php bin/magento module:enable MageB2B_StaffQuote
php bin/magento setup:upgrade
php bin/magento cache:flush
```

Import/Export

```
composer config bearer.repo.softwaresilo.io <token>
composer config repositories.softwaresilo composer
https://repo.softwaresilo.io/
composer require mageb2b/staff-importexport:*
php bin/magento module:enable MageB2B_StaffImportExport
php bin/magento setup:upgrade
php bin/magento cache:flush
```

Hyvä Compatibility

```
composer config bearer.repo.softwaresilo.io <token>
composer config repositories.softwaresilo composer
https://repo.softwaresilo.io/
composer require mageb2b/staff-hyva:*
php bin/magento module:enable MageB2B_StaffHyva
php bin/magento setup:upgrade
```

```
php bin/magento cache:flush
```

SAML Single Sign-On (SSO)

```
composer config bearer.repo.softwaresilo.io <token>
composer config repositories.softwaresilo composer
https://repo.softwaresilo.io/
composer require mageb2b/staff-saml:*
php bin/magento module:enable MageB2B_StaffSaml
php bin/magento setup:upgrade
php bin/magento cache:flush
```

Sample Data

For staging/dev environments:

Compatibility note: `mageb2b/staff-sample-data` currently requires PHP `~7.4|~8.0`; `staff-quote-sample-data` depends on it.

```
composer config bearer.repo.softwaresilo.io <token>
composer config repositories.softwaresilo composer
https://repo.softwaresilo.io/
composer require mageb2b/staff-sample-data:*
php bin/magento module:enable MageB2B_StaffSampleData
php bin/magento setup:upgrade
php bin/magento cache:flush
```

If you installed the Staff Quote add-on and want demo quote data:

```
composer config bearer.repo.softwaresilo.io <token>
composer config repositories.softwaresilo composer
https://repo.softwaresilo.io/
composer require mageb2b/staff-quote-sample-data:*
php bin/magento module:enable MageB2B_StaffQuoteSampleData
php bin/magento setup:upgrade
php bin/magento cache:flush
```

Troubleshooting Installation

Module Not Showing in Admin

Problem: Configuration page not visible

Solution:

```
php bin/magento cache:flush
php bin/magento setup:upgrade
```

Database Tables Not Created

Problem: Tables missing after setup:upgrade

Solution:

```
# Check module is enabled
php bin/magento module:status MageB2B_Staff

# Run setup again
php bin/magento setup:upgrade --keep-generated
```

Permission Errors

Problem: Cannot write to directories

Solution:

```
# Set correct permissions
chmod -R 755 var/ pub/static/ generated/
chown -R www-data:www-data var/ pub/static/ generated/
```

Uninstallation

If you need to remove the extension:

```
php bin/magento module:uninstall MageB2B_Staff
```

This will:

- Remove the module code
- Drop `customer_salesstaff` and `customer_salesstaff_customer`
- Remove related staff attributes/entity data

Warning: This permanently deletes all staff accounts and data!

Next Steps

Now that the extension is installed, configure it for your needs:

Configuration Guide →

Configuration

Sales Staff Extension · /staff/getting-started/configuration

This guide covers the most-used configuration options for the Sales Staff extension.

Configuration Location

Navigate to: **Stores > Configuration > MageB2B > Staff**

General Settings

Session Management

Session Lifetime (seconds)

- Default: 900 (15 minutes)
- Range: 60 - 31536000 (1 year)
- Controls how long staff sessions remain active

Recommendation: Set to 3600-7200 if you want longer staff sessions.

Customer Assignment

Can customer have multiple staff

- Yes: Customers can be assigned to multiple staff members
- No: One customer = one staff member

Use Case: Enable for team-based sales, disable for territory management.

Enable search customers by staff for frontend

- Adds Staff Firstname/Lastname/Email/Phone filters to the staff customer grid
- Note: Hidden when "Can customer have multiple staff" is enabled

Frontend Links

Add footer link for staff signup

- Adds registration link to store footer
- Enable if you want public staff registration
- Note: staff signup creates an account that must be activated by an admin before the staff user can log in.

Add footer link for staff login

- Adds login link to store footer
- Recommended: Yes

Privacy Policy Page

- Select CMS page for privacy policy link on signup form
- Required for GDPR compliance

Customer Management

List customers in frontend

- Staff can see complete list of assigned customers
- Recommended: Yes

Activate check and staff in frontend

- Staff can check and add customers from frontend
- Useful for field sales

Show customers by default inside my customers section

- If disabled, list only shows after search
- Recommended: Yes for small customer bases, No for large

Login & Redirect

Login post url handle

- Example: `staff/mypage`
- Redirect URL after staff login
- Default: Staff dashboard

Permissions

Can staff delete his own customers?

- Only removes staff-customer relationship, not customer account
- Recommended: No (enable only if staff should manage their assignments)

Can customer reassign own account to another Sales Staff?

- Allows customers to choose their sales representative
- Use case: Customer preference, territory changes

Password Security

Reset link expiration period (hours)

- Default: 2 hours
- Minimum: 1 hour
- How long password reset links remain valid

Minimum Password Length

- Default: 8 characters
- Minimum: 1
- Enforce strong passwords

Display Options

Show comments in my customers list

- Display customer notes in grid

- Useful for quick reference

Display staff in customer dashboard

- Show staff information in customer account
- Builds customer-staff relationship

Display primary staff account only

- Only show primary staff (if multiple assigned)
- Cleaner customer interface

Default staff image

- Upload default profile image for staff without photos
- Recommended: Professional placeholder image

Advanced Filters

Enable External Customer ID on customer grid

- Add custom customer ID field to filters
- Use case: ERP integration, legacy system IDs

External Customer ID attribute code

- Specify customer attribute code
- Example: `erp_customer_id`

Search filters for customer grid

- Configure which filters appear in customer grid
- Drag to reorder, enable/disable filters

Filter default billing address only

- Only filter by default billing addresses
- Improves performance for large customer bases

Filter default shipping address only

- Only filter by default shipping addresses
- Improves performance

Enable limiter on Customer Grid

- Allow staff to change records per page
- Options: 10, 20, 50, 100, 250, All

Staff Groups

Default Staff Group

- Automatically assigned to new staff members
- Create groups first: Staff > Staff Groups

Access Control

Restrict customer groups

- Limit which customer groups staff can manage
- Use case: Separate B2B and B2C management

Not allowed handles

- Block staff from accessing specific pages
- Example: `customer_account_login`
- Security feature

Order Settings

Set staff permanently on order

- Assign customer's primary staff to all orders
- Even if different staff places order
- Use case: Commission tracking

Allow 0 Price on Item Price Edit

- Staff can set item price to zero
- Use case: Free samples, replacements

Commission Settings

Commission Type

Commission type

- **Total excluding tax**: Calculate on subtotal
- **Total including tax**: Calculate on subtotal including tax
- **Product discount**: Based on discount amount

Show commission for Staff at my staff account page

- Display commission earnings in staff dashboard
- Recommended: Yes for transparency

Admin Settings

Order Grid

Add Sales Staff to Order Grid

- Show staff column in admin order grid
- Recommended: Yes

Add Reassign feature for Sales Staff to Order Grid

- Mass action to reassign orders to different staff
- Useful for territory changes, staff departures

Customer Registration Settings

Frontend Customer Creation

Enable creating new customer

- Staff can create customer accounts from frontend
- Essential for field sales

Show customer group field on customer registration

- Allow staff to select customer group
- Use case: B2B vs B2C classification

Show address fields on customer registration

- Include address form in customer creation
- Recommended: Yes

Show vat field

- Display VAT number field
- Required for EU B2B

Can Staff set password for customer

- Staff can set initial password
- Alternative: Customer receives email invitation

Email Settings

Email Templates

Activated Emails

- Select which email templates are active
- Disable unused notifications

Apply following settings to

- Choose which order email templates to customize
- Example: New Order, Order Confirmation

Email order to

- **None**: No order email will be sent
- **Customer (Receiver) and Staff (Receiver)**
- **Customer (Receiver)**
- **Customer (Receiver) and Staff (BCC)**
- **Staff (Receiver)**

Sent email copy to staff when customer is placing an order

- Staff receives copy when customer orders directly
- Requires "Set staff permanently on order" enabled

Email Templates Configuration

Email template new staff

- Template: `Staff New Account`
- Sent when staff account is created

Email template password for customer created by staff

- Template: `Customer Password Set by Staff`
- Sent when staff creates customer with password

Email template for staff activation

- Template: `Staff Activated`
- Sent when admin activates staff account

Email template for staff de-activation

- Template: `Staff Deactivated`
- Sent when admin deactivates staff account

Email template for staff forgot password

- Template: `Staff Forgot Password`
- Password reset email

Email template for staff password updated

- Template: `Staff Password Updated`
- Confirmation after password change

Email Recipients

CC Receiver for staff emails

- Comma-separated email addresses
- Example: `manager@example.com,sales@example.com`

BCC Receiver for staff emails

- Hidden copy recipients
- Use for compliance, monitoring

Send order email from fixed Store View

- Always send from specific store view
- Use case: Multi-store with centralized sales

Staff name and email details

- Template for staff information in emails
- Variables: `{{firstname}}`, `{{lastname}}`, `{{email}}`, `{{phone}}`
- Add `{{var order_staff_name_email_detail}}` to order templates

Pricesystem Settings

Display additional pricesystem prices

- Show alternative prices from Pricesystem extension
- Requires: MageB2B_PricesystemCore
- Staff can select from dropdown when editing cart prices

Configuration Best Practices

For Small Teams (1-10 staff)

```
- Session Lifetime: 7200 (2 hours)
- Multiple staff per customer: No
- Show customers by default: Yes
- Commission type: Total excluding tax
- Email order to: Both
```

For Large Teams (10+ staff)

```
- Session Lifetime: 3600 (1 hour)
- Multiple staff per customer: Yes
- Show customers by default: No
- Enable limiter: Yes
- Restrict customer groups: Yes
- Commission type: Total excluding tax
```

For Field Sales

```
- Enable creating new customer: Yes
- Show address fields: Yes
- Can staff set password: Yes
- Login redirect: staff/customers
- Display staff in customer dashboard: Yes
```

For Inside Sales

```
- Enable creating new customer: Yes
- List customers in frontend: Yes
- Allow 0 price editing: Yes
- Email order to: Staff
- Show commission: Yes
```

Testing Configuration

After configuration, test:

1. **Staff Login**: Try logging in as staff

2. **Customer Assignment**: Assign a test customer
3. **Customer Impersonation**: Log into customer account
4. **Order Placement**: Place test order
5. **Commission Calculation**: Verify commission is calculated
6. **Email Delivery**: Check all email templates work

Next Steps

Configuration complete? Create your first staff account:

Create Your First Staff Account →

First Staff

Sales Staff Extension · /staff/getting-started/first-staff

This guide walks you through creating and configuring your first sales staff account.

Prerequisites

- Extension installed and configured
- At least one staff group created
- Email templates configured

Step 1: Create Staff Group

Before creating staff, create a group:

Navigate to Staff Groups

Go to: **Staff > Staff Groups**

Add New Group

Click **Add New**

Fill in:

- **Name**: Sales Representatives
- Click **Save**

You can create multiple groups:

- Sales Representatives
- Field Sales
- Inside Sales
- Customer Service
- Territory North
- Territory South

Step 2: Create Staff Account

Navigate to Staff Management

Go to: **Staff > All Staff**

Add New Staff

Click **Add New**

Fill Basic Information

Account Information:

- **First Name**: John
- **Last Name**: Smith
- **Email**: john.smith@example.com
- **Password**: Set secure password per your configured minimum length (default: 8)
- **Phone**: +1 555-0123
- **Status**: Active
- **Website**: Select website

Group & Permissions:

- **Staff Group**: Sales Representatives
- **Access All Customers**: No (assign specific customers)
- **Can Edit Item Price**: Yes (allow price adjustments)
- **Can Create Customer**: Yes (allow customer creation)

Commission:

- **Commission**: 5.00 (5% commission)

Profile Image (optional):

- Upload professional photo
- Recommended: 200x200px minimum

Save Staff Account

Click **Save**

The staff member will receive a "New Account" email with login instructions (if the corresponding email template is activated).

Step 3: Assign Customers

Option A: Assign from Staff Edit Page

1. Edit the staff account
2. Use the **Customers** grid section
3. Select customers using checkboxes
4. Save staff account

Option B: Assign from Customer Edit Page

1. Go to **Customers > All Customers**
2. Edit a customer
3. Set **Primary Staff**
4. Save customer

Option C: Mass Assignment

1. Go to **Customers > All Customers**
2. Select multiple customers (checkboxes)
3. **Actions** > **Assign Primary Sales Staff**
4. Select staff member
5. Click **Submit**

Step 4: Test Staff Login

Frontend Login URL

Staff login page: `https://yourstore.com/staff/account/login`

Or use footer link if enabled.

Login Credentials

- **Email**: john.smith@example.com
- **Password**: (password you set)

After Login

Staff should see:

- **Dashboard**: Overview with statistics
- **My Account**: Profile/account details
- **Customers**: List of assigned customers
- **My Orders**: Orders placed by this staff

Optional items depend on configuration (for example commission visibility).

Step 5: Test Customer Impersonation

From Staff Dashboard

1. Go to **Customers**
2. Find a customer
3. Use the customer login action (tooltip: **Login to this account**)
4. You're now logged into the customer account

Place Test Order

1. Add products to cart
2. Proceed to checkout
3. Complete order
4. Order is automatically assigned to staff
5. Commission is calculated

Exit Customer Context

Use the header menu: **My Staff Account** or **Logout from current customer**.

Step 6: Verify Commission

Check Order

1. Go to **Sales > Orders** (admin)
2. Open the test order
3. Verify **Sales Staff** field shows: John Smith

4. Verify commission via order comment/history entry

Check Staff Dashboard

1. Login as staff (frontend)
2. Open **My Account**
3. Verify commission is displayed there (if enabled in configuration)
4. Check order appears in **My Orders**

Common Scenarios

Scenario 1: Field Sales Representative

Configuration:

```
First Name: Sarah
Last Name: Johnson
Email: sarah.johnson@example.com
Staff Group: Field Sales
Access All Customers: No
Can Edit Item Price: Yes
Can Create Customer: Yes
Commission: 7.5%
```

Assigned Customers: 50 customers in Territory North

Use Case: Sarah visits customers on-site, creates new accounts, places orders with custom pricing.

Scenario 2: Inside Sales Agent

Configuration:

```
First Name: Mike
Last Name: Davis
Email: mike.davis@example.com
Staff Group: Inside Sales
Access All Customers: Yes
Can Edit Item Price: Yes
Can Create Customer: Yes
Commission: 3.0%
```

Assigned Customers: All customers (access_all_customers = Yes)

Use Case: Mike handles phone orders from any customer, processes orders quickly.

Scenario 3: Customer Service Representative

Configuration:

```
First Name: Lisa
Last Name: Anderson
```

```
Email: lisa.anderson@example.com
Staff Group: Customer Service
Access All Customers: Yes
Can Edit Item Price: Yes
Can Create Customer: No
Commission: 0%
```

Assigned Customers: All customers

Use Case: Lisa assists customers with orders, applies discounts, but doesn't earn commission.

Scenario 4: Territory Manager

Configuration:

```
First Name: Robert
Last Name: Wilson
Email: robert.wilson@example.com
Staff Group: Territory West
Access All Customers: No
Can Edit Item Price: Yes
Can Create Customer: Yes
Commission: 10.0%
```

Assigned Customers: 150 customers in Western region

Use Case: Robert manages large territory, high commission rate, creates new B2B accounts.

Staff Account Management

Activate/Deactivate Staff

Deactivate:

1. Edit staff account
2. Set **Status**: Inactive
3. Save
4. Staff receives "Deactivated" email (if the corresponding email template is activated)
5. Staff cannot log in

Reactivate:

1. Edit staff account
2. Set **Status**: Active
3. Save
4. Staff receives "Activated" email (if the corresponding email template is activated)
5. Staff can log in again

Change Staff Group

1. Edit staff account
2. Change **Staff Group**

3. Save
4. All future orders use new group

Reassign Customers

Remove Customer:

1. Edit staff account
2. Find customer in **Customers** grid
3. Click **Remove**
4. Save

Transfer Customers to Another Staff:

1. Go to **Customers > All Customers**
2. Select customers (checkboxes)
3. **Actions** > **Assign Primary Sales Staff**
4. Select new staff member
5. Submit

Update Commission Rate

1. Edit staff account
2. Change **Commission**
3. Save
4. New rate applies to future orders only

Email Notifications

Staff can receive emails (if corresponding templates are activated):

- **New Account**: Welcome email with login link
- **Activated**: Account activated notification
- **Deactivated**: Account deactivated notification
- **Password Reset**: Forgot password link
- **Password Updated**: Confirmation after password change
- **Order Placed**: When order is placed (if configured)

Troubleshooting

Staff Cannot Login

Check:

- Status is Active
- Email is correct
- Password is correct
- Website is correct

Solution: Reset password via "Forgot Password" link

No Customers Visible

Check:

- Customers are assigned to staff
- "Access All Customers" setting
- Customer group restrictions

Solution: Assign customers or enable "Access All Customers"

Commission Not Calculated

Check:

- Commission is set
- Commission type is configured
- Order is not canceled

Solution: Edit staff, set commission, save

Cannot Create Customer

Check:

- "Can Create Customer" is enabled (staff account)
- "Enable creating new customer" is enabled (configuration)

Solution: Enable both settings

Best Practices

Security

- Use strong passwords (min 12 characters)
- Enable two-factor authentication (if add-on installed)
- Regular password changes
- Deactivate departed staff immediately

Organization

- Use meaningful staff groups
- Consistent naming conventions
- Document territory assignments
- Regular customer assignment reviews

Commission

- Clear commission structure
- Document commission rules
- Regular commission reports
- Transparent earnings display

Training

- Provide staff login instructions
- Document customer impersonation process
- Train on price editing policies
- Explain commission calculation

Next Steps

Now that you have a staff account, explore the features:

Customer Assignment → Customer Impersonation → Commission System →

Commission System

Sales Staff Extension · /staff/features/commission-system

Learn how the automatic commission calculation and tracking system works for sales staff.

Overview

The Commission System:

- Calculates commissions automatically on orders
- Supports multiple calculation methods
- Tracks earnings per staff member
- Stores commission data with orders
- Provides reporting and analytics

Commission Types

1. Total Excluding Tax

Configuration: Commission type = "Total excluding tax"

Calculation: Based on order subtotal (before tax and shipping)

Formula:

```
Commission = (Order Subtotal × Commission %) / 100
```

Example:

```
Order Subtotal: $1,000.00
Tax: $80.00
Shipping: $20.00
Grand Total: $1,100.00

Staff Commission: 5%
Commission Amount: $1,000.00 × 5% = $50.00
```

Use Case: Standard B2B sales, wholesale

2. Total Including Tax

Configuration: Commission type = "Total including tax"

Calculation: Based on subtotal including tax (before shipping)

Formula:

```
Commission = (Subtotal Incl. Tax × Commission %) / 100
```

Example:

```
Order Subtotal: $1,000.00
Tax: $80.00
Subtotal Incl. Tax: $1,080.00
Shipping: $20.00
Grand Total: $1,100.00

Staff Commission: 5%
Commission Amount: $1,080.00 × 5% = $54.00
```

Use Case: Retail sales, B2C operations

3. Product Discount

Configuration: Commission type = "Product discount"

Calculation: Based on discount amount given

Formula:

```
Commission = Sum of all product discounts
```

Example:

```
Product A: Original $100, Sold $90, Discount $10
Product B: Original $200, Sold $180, Discount $20
Product C: Original $50, Sold $50, Discount $0

Total Discount: $30
Commission Amount: $30.00
```

Use Case: Incentivize discounting, promotional sales

Commission Configuration

Per-Staff Commission Rate

Location: Staff > All Staff > Edit Staff

Field: Commission

Examples:

- Junior Sales: 3.0%
- Senior Sales: 5.0%
- Territory Manager: 7.5%
- VP Sales: 10.0%

Flexibility: Each staff member can have different rate

System-Wide Settings

Location: Stores > Configuration > MageB2B > Staff > Commission

Settings:

- **Commission type**: Select calculation method
- **Show commission for Staff**: Display in staff dashboard

Commission Calculation Process

When Order is Placed

Step 1: Order created

- Staff ID captured from session
- Or from customer's primary staff (if configured)

Step 2: Commission calculated

- Based on commission type
- Using staff's commission percentage
- Rounded to 2 decimal places

Step 3: Commission stored

- Commission value stored with the order
- Visible in admin order view
- Included in order comments

Step 4: Staff notified (optional)

- Email with commission details
- Dashboard updated
- Order appears in "My Orders"

```
flowchart TD
  A[Order placed] --> B[Determine staff]
  B --> C[Compute base amount]
  C --> D[Apply commission percent]
  D --> E[Store commission on order]
  E --> F[Visible in Staff My Orders and Admin Order View]
```

Order Status Changes

Canceled Orders:

- Commission set to $0.00
- Previous commission removed
- Staff dashboard updated

Refunds / Credit Memos:

The core Staff module stores a single commission amount on the order. It does not automatically recalculate commission on refunds/credit memos.

Viewing Commissions

Staff Dashboard (Frontend)

Location: Staff Account > My Account

Displays:

- Your current commission rate (percentage)

Example:

Field	Value
My current commission	5%

Staff Orders (Frontend)

Location: Staff Account > My Orders

Each order row shows the commission amount stored on the order.

Admin Order View

Location: Sales > Orders > View Order

Fields:

- **Sales Staff**: Staff name
- **Sales Staff Group**: Group name
- **Sales Staff Commission**: Commission amount

Order Comments:

```
Sales Staff John Smith earned a commission of $50.00.
```

Admin Reports

Built into the core Staff feature set.

Available Reports:

- Commission by staff member
- Commission by staff group
- Commission by time period
- Commission by product
- Commission by customer

Commission Scenarios

Scenario 1: Standard Order

Setup:

- Staff: John Smith
- Commission: 5%
- Commission Type: Total excluding tax

Order:

```
Product A: $500.00
Product B: $300.00
Subtotal: $800.00
Tax (8%): $64.00
Shipping: $20.00
Grand Total: $884.00
```

Commission:

```
$800.00 × 5% = $40.00
```

Scenario 2: Discounted Order

Setup:

- Staff: Sarah Johnson
- Commission: 7%
- Commission Type: Total excluding tax

Order:

```
Product A: $1,000.00
Coupon Discount: -$100.00
Subtotal: $900.00
Tax (8%): $72.00
Shipping: $25.00
Grand Total: $997.00
```

Commission:

```
$900.00 × 7% = $63.00
```

Scenario 3: Multiple Products with Price Edits

Setup:

- Staff: Mike Davis
- Commission: 5%
- Commission Type: Product discount

Order:

```
Product A: Original $200, Sold $180 (Discount $20)
Product B: Original $150, Sold $140 (Discount $10)
Product C: Original $100, Sold $100 (Discount $0)
Total Discount: $30
```

Commission:

```
$30.00 (sum of discounts)
```

Scenario 4: Customer Service (No Commission)

Setup:

- Staff: Lisa Anderson (Customer Service)
- Commission: 0%
- Commission Type: Total excluding tax

Order:

```
Subtotal: $500.00
Tax: $40.00
Shipping: $15.00
Grand Total: $555.00
```

Commission:

```
$500.00 × 0% = $0.00
```

Advanced Configuration

Permanent Staff Assignment

Configuration: Stores > Configuration > MageB2B > Staff > General

- **Set staff permanently on order**: Yes

Behavior:

- Order assigned to customer's primary staff
- Even if different staff places order
- Even if customer places order directly

Use Case: Ensure primary staff always gets commission

Example:

```
Customer: Acme Corp
Primary Staff: John Smith (5% commission)
Order placed by: Customer directly
```

```
Result: Order assigned to John Smith, $50 commission
```

Email Copy to Staff

Configuration: Stores > Configuration > MageB2B > Staff > Email

- **Sent email copy to staff when customer is placing an order**: Yes

Requires: "Set staff permanently on order" = Yes

Behavior:

- Staff receives order confirmation email
- Includes commission information
- Even when customer orders directly

Commission Adjustments

Manual Override (Admin Order Create)

When creating an order in the Magento Admin, you can optionally enter a commission override for the order.

Use Cases:

- Correction of calculation errors
- Special bonuses
- Commission disputes
- Retroactive rate changes

Reassign Staff

Process:

1. Go to Sales > Orders
2. Select orders (checkboxes)
3. Actions > Reassign Sales Staff
4. Select new staff member
5. Submit

Result:

- Staff ID updated
- Existing commission remains unchanged by the reassignment action

Commission Reports

Reports Availability

The core module stores commission values on orders and provides reporting screens in Staff > Reports.

- Total commission earned
- Average commission per order

Advanced Reports

Built into core `mageb2b/staff`.

Report Types:

1. Commission by Period

- Daily, weekly, monthly, yearly
- Compare periods
- Trend analysis

2. Commission by Staff

- Ranking by commission
- Performance comparison
- Goal tracking

3. Commission by Product

- Which products generate most commission
- Product performance analysis
- Inventory planning

4. Commission by Customer

- High-value customers
- Customer profitability
- Account prioritization

Export Options

Formats:

- CSV
- Excel
- PDF

Use Cases:

- Payroll processing
- Accounting integration
- Performance reviews
- Tax reporting

Best Practices

Commission Structure

Tiered Commissions:

```
Junior Sales: 3%
Sales Rep: 5%
Senior Sales: 7%
Territory Manager: 10%
```

Product-Based:

```
Standard Products: 5%
High-Margin Products: 7%
New Products: 10%
Clearance: 2%
```

Volume-Based:

```
$0 - $10,000/month: 5%
$10,001 - $25,000/month: 6%
$25,001 - $50,000/month: 7%
$50,001+/month: 8%
```

Transparency

Recommendations:

- Show commission in staff dashboard
- Provide detailed breakdowns
- Explain calculation method
- Regular commission statements

Accuracy

Ensure:

- Correct commission type selected
- Staff rates up to date
- Order status handling defined
- Refund policy documented

Performance Tracking

Monitor:

- Commission trends
- Top performers
- Underperformers
- Goal achievement

Troubleshooting

Commission Not Calculated

Check:

1. Staff Commission is set (not 0%)
2. Commission type is configured
3. Order is not canceled

4. Staff was assigned to order

Solution: Edit staff, set Commission, save

Wrong Commission Amount

Check:

1. Commission type (excl/incl tax, discount)
2. Staff commission percentage
3. Order totals (subtotal, tax, shipping)
4. Discount calculations

Solution: Verify configuration, manually adjust if needed

Commission Shows $0.00

Possible Reasons:

1. Staff commission rate is 0%
2. Order was canceled
3. Commission type is "Product discount" but no discounts given
4. Calculation error

Solution: Check staff settings and order details

Staff Cannot See Commission

Check:

1. Configuration: "Show commission for Staff" = Yes
2. Staff is logged in
3. Staff has placed orders
4. Orders are not all canceled

Solution: Enable commission display in configuration

Next Steps

Learn about staff groups and organization:

Staff Groups →

Customer Assignment

Sales Staff Extension · /staff/features/customer-assignment

Learn how to assign customers to sales staff and manage customer-staff relationships.

Overview

The Customer Assignment system allows you to:

- Assign specific customers to staff members
- Support one-to-one or many-to-many relationships
- Add notes and comments per customer
- Grant access to all customers for managers
- Track a **primary staff** per customer (used for display and optional order assignment)

Assignment Methods

Method 1: From Staff Account

Navigate: Staff > All Staff

1. Edit staff account
2. Scroll to **Customers** section
3. Use filters to find customers:
    - Name
    - Email
    - Customer Group
    - External Customer ID
4. Select customers (checkboxes)
5. Save staff account

Advantages:

- Bulk assignment
- See all assigned customers in one place

Method 2: From Customer Account

Navigate: Customers > All Customers

1. Edit customer account
2. Set the **Primary staff** value
3. Save customer

Advantages:

- Quick single assignment
- Set primary staff (used for dashboard display and order assignment if enabled)
- Customer-centric view

Method 3: Mass Assignment

Navigate: Customers > All Customers

1. Select multiple customers (checkboxes)
2. **Actions** dropdown > **Assign Primary Sales Staff**
3. Select staff member
4. Apply action

Advantages:

- Fastest for bulk operations
- Territory assignments
- Staff changes

Method 4: Import/Export

Requires: MageB2B_StaffImportExport add-on

1. Export current assignments
2. Edit CSV file
3. Import updated assignments

Advantages:

- Large-scale operations
- External data integration
- Backup and restore

Assignment Types

One-to-One Assignment

Configuration:

- **Can customer have multiple staff**: No

Behavior:

- Each customer should have exactly one staff relationship
- The system uses the customer’s **Primary staff** to represent that relationship
- When the primary staff changes, the previous staff assignment is removed automatically (so you don’t accumulate multiple assignments by accident)

Use Case: Territory-based sales, exclusive customer relationships

Example:

```
Customer A → Staff 1
Customer B → Staff 2
Customer C → Staff 1
```

Many-to-Many Assignment

Configuration:

- **Can customer have multiple staff**: Yes

Behavior:

- Customers can be assigned to multiple staff accounts
- The customer can still have **one** primary staff
- All assigned staff can access the customer (unless you restrict access via other settings)

Use Case: Team-based sales, account management teams

Example:

```
Customer A → Staff 1 (Primary), Staff 2, Staff 3
Customer B → Staff 2 (Primary), Staff 4
Customer C → Staff 1 (Primary)
```

Access All Customers

Configuration:

- Staff account: **Access All Customers**: Yes

Behavior:

- Staff can access any customer
- No explicit assignment needed
- Useful for managers, customer service

Use Case: Senior sales, customer support, management

Primary Staff

What is Primary Staff?

Primary staff is stored with the customer account and is used for:

- Displaying the assigned sales contact in the customer account dashboard (if enabled)
- Assigning orders to the primary staff when **Set staff permanently on order** is enabled

Setting Primary Staff

From Customer Grid (bulk):

1. Customers > All Customers
2. Select customers
3. Actions > **Assign Primary Sales Staff**
4. Pick staff

From Customer Edit (single):

1. Customers > All Customers > Edit customer
2. Set **Primary staff**
3. Save

Primary Staff Benefits

- **Order Assignment**: Orders can be assigned to primary staff (optional setting)
- **Customer Communication**: Primary contact for customer
- **Reporting**: Primary staff in reports

Customer Comments

Adding Comments

Purpose: Track customer-specific information

Examples:

- "Prefers phone orders"
- "Net 30 payment terms"
- "VIP customer - priority service"
- "Contact before 2 PM only"

Add Comment: Comments are typically managed by staff users in the frontend:

1. Login as staff
2. Go to **Customers**
3. Add/update the comment for a customer

Admins can still *view* comments in the staff-customer assignment grids.

Viewing Comments

Staff Dashboard:

- Go to **Customers**
- Comments visible in grid (if enabled)
- Hover for full comment

Configuration:

- **Show comments in my customers list**: Yes

Access Control

Customer Group Restrictions

Configuration: Stores > Configuration > MageB2B > Staff > General

- **Restrict customer groups**: Select groups

Behavior:

- Staff can only see selected customer groups

- Other groups are hidden
- Useful for B2B/B2C separation

Example:

```
Staff Group: B2B Sales
Restricted to: Wholesale, Distributor
Cannot see: General, Retail
```

Website-Specific Staff

Behavior:

- Staff accounts are website-specific
- Staff customer filtering by website depends on website sharing scope configuration
- Multi-store isolation

Use Case: Multi-brand operations, regional websites

Customer Search & Filters

Standard Filters

Available in **Customers** grid:

- **Name**: First name, last name
- **Email**: Customer email
- **Customer Group**: Group filter
- **City**: Billing/shipping city
- **State**: Billing/shipping state
- **ZIP**: Postal code
- **Country**: Country filter

External Customer ID

Configuration:

- **Enable External Customer ID on customer grid**: Yes
- **External Customer ID attribute code**: `erp_customer_id`

Use Case: ERP integration, legacy system IDs

Example:

```
Customer: Acme Corp
External ID: ERP-12345
Staff can search: ERP-12345
```

Address Filters

Configuration:

- **Filter default billing address only**: Yes
- **Filter default shipping address only**: Yes

Benefit: Improved performance for large customer bases

Custom Search Filters

Configuration: Stores > Configuration > MageB2B > Staff > General

- **Search filters for customer grid**: Configure filters

Options:

- Enable/disable filters
- Reorder filters (drag & drop)
- Custom attribute filters

Customer List Display

Show Customers by Default

Configuration:

- **Show customers by default**: Yes/No

Yes: All customers displayed immediately **No**: Customers shown only after search

Recommendation:

- Yes: < 100 customers per staff
- No: > 100 customers per staff

Records Per Page

Configuration:

- **Enable limiter on Customer Grid**: Yes

Options: 10, 20, 50, 100, 250, All

Benefit: Staff can choose preferred view

Removing Customer Assignments

Remove from Staff Account

1. Edit staff account
2. Find customer in **Customers** grid
3. Click **Remove** or **Delete** icon
4. Save staff account

Result: Customer-staff relationship removed, customer account remains

Staff Can Delete Customers

Configuration:

- **Can staff delete his own customers**: Yes

Behavior:

- Staff can remove customer assignments from frontend
- Only removes relationship, not customer account
- Useful for territory changes

Mass Assignment Note

The customer grid mass action supports **Assign Primary Sales Staff**. Bulk removal of staff-customer relations is handled through staff/customer edit flows.

Customer Reassignment

Customer Self-Reassignment

Configuration:

- **Can customer reassign own account to another Sales Staff**: Yes

Behavior:

- Customer can choose their sales representative
- Available in customer dashboard
- Staff receives notification

Use Case: Customer preference, territory changes

Admin Reassignment

Scenario: Staff member leaves company

Process:

1. Go to **Customers > All Customers**
2. Filter by departing staff
3. Select all customers
4. **Actions** > **Assign Primary Sales Staff**
5. Select new staff member
6. Submit

Result: All customers transferred to new staff

Best Practices

Territory Management

Strategy:

```
1. Define territories (North, South, East, West)
2. Create staff groups per territory
3. Assign customers by ZIP code or state
4. Use mass assignment for efficiency
```

Team-Based Sales

Strategy:

```
1. Enable multiple staff per customer
2. Assign account manager (primary)
3. Assign support staff (secondary)
4. Use comments to define roles
```

Customer Service

Strategy:

```
1. Create "Customer Service" staff group
2. Enable "Access All Customers"
3. Set commission to 0%
4. Focus on support, not sales
```

Performance Optimization

For Large Customer Bases:

- Disable "Show customers by default"
- Enable address filters (default only)
- Use external customer ID for quick search
- Enable limiter for pagination

Reporting

Assignment Reports

Available Data:

- Customers per staff member
- Unassigned customers
- Multiple staff assignments
- Primary staff distribution

Access: Staff > Reports

Customer Distribution

Metrics:

- Total customers per staff

- Customers per staff group
- Average customers per staff
- Unassigned customer count

Troubleshooting

Customer Not Visible to Staff

Check:

1. Customer is assigned to staff
2. Customer group not restricted
3. Website scope/sharing settings allow the customer to appear
4. Staff status is Active

Cannot Assign Customer

Check:

1. Customer exists
2. Staff account is Active
3. No customer group restrictions
4. Correct website selected

Multiple Staff Conflicts

Issue: Customer has multiple staff, unclear who is primary

Solution:

1. Edit customer account
2. Verify primary staff checkbox
3. Only one staff should be primary
4. Save customer

Next Steps

Learn about customer impersonation:

Customer Impersonation →

Customer Creation

Sales Staff Extension · /staff/features/customer-creation

Learn how sales staff can create new customer accounts directly from the frontend.

Overview

The Frontend Customer Creation feature allows staff to:

- Create customer accounts without admin access
- Set customer groups during creation
- Add address information
- Set initial passwords
- Configure VAT numbers
- Streamline B2B onboarding

Enable Feature

Staff Permission

Location: Staff > All Staff > Edit Staff

Setting: **Can create Customer** = Yes

System Configuration

Location: Stores > Configuration > MageB2B > Staff > Customer Registration

Settings:

- **Enable creating new customer**: Yes
- **Show customer group field**: Yes/No
- **Show address fields**: Yes/No
- **Show vat field**: Yes/No
- **Can Staff set password for customer**: Yes/No

Create Customer Process

Step 1: Access Creation Form

From Staff Dashboard:

1. Login as staff
2. Go to **Customers**
3. Click **Create Customer Account**

Quick Access:

- Dashboard widget: "Create Customer"
- Top menu: Customers > Create New

Step 2: Fill Customer Information

Required Fields:

- **First Name**
- **Last Name**
- **Email** (must be unique)

Optional Fields:

- **Customer Group** (if enabled)
- **Phone**
- **Company**
- **VAT Number** (if enabled)
- **Date of Birth**
- **Gender**

Example:

```
First Name: John
Last Name: Doe
Email: john.doe@acmecorp.com
Phone: +1 555-0123
Company: Acme Corporation
Customer Group: Wholesale
VAT Number: DE123456789
```

Step 3: Add Address (Optional)

If "Show address fields" = Yes:

Billing Address:

- Street Address
- City
- State/Province
- ZIP/Postal Code
- Country
- Phone

Shipping Address:

- Same as billing (checkbox)
- Or enter different address

Example:

```
Street: 123 Main Street
City: New York
State: NY
ZIP: 10001
Country: United States
Phone: +1 555-0123
```

Step 4: Set Password (Optional)

If "Can Staff set password for customer" = Yes:

Option A: Set Password

- Enter password
- Confirm password
- Customer can login immediately

Option B: Send Email Invitation

- Leave password empty
- Customer receives email with set password link
- Customer sets own password

Recommendation: Use email invitation for security

Step 5: Save Customer

Click **Create Customer Account**

What Happens:

1. Customer account created
2. Customer automatically assigned to staff
3. Staff marked as primary
4. Email sent to customer (if configured)
5. Redirect to the customer creation page (`salesstaff/index/register`)

Configuration Options

Customer Group Selection

Enable: Show customer group field = Yes

Use Cases:

- Classify B2B vs B2C
- Apply different pricing
- Set different permissions
- Segment customers

Available Groups:

- General
- Wholesale
- Retailer
- Distributor
- VIP
- (Custom groups)

Default Group: General (if not selected)

Address Fields

Enable: Show address fields = Yes

Benefits:

- Complete customer profile immediately
- Ready for first order
- No additional setup needed

When to Disable:

- Quick customer creation
- Address added later
- Customer adds own address

VAT Number

Enable: Show vat field = Yes

Use Cases:

- EU B2B customers
- Tax exemption
- Compliance requirements
- Invoice requirements

Validation:

- Format validation (optional)
- VIES validation (optional)
- Duplicate check

Password Setting

Enable: Can Staff set password for customer = Yes

Option A: Staff Sets Password

- **Pros**: Customer can login immediately
- **Cons**: Security concern, password sharing

Option B: Email Invitation

- **Pros**: More secure, customer controls password
- **Cons**: Requires email access, extra step

Recommendation: Use email invitation for B2B

Email Notifications

Customer Welcome Email

Template: Customer New Account

Sent When: Customer created

Contains:

- Welcome message
- Account details
- Login link
- Set password link (if no password set)
- Contact information

Password Email

Template: Customer Password Set by Staff

Sent When: Staff sets password

Contains:

- Account created notification
- Username (email)
- Set-password URL
- Login link
- Security reminder

Security Note: Consider using invitation instead

Validation & Errors

Email Already Exists

Error: "Email address already exists"

Cause: Email used by another customer or staff

Solution:

- Use different email
- Check if customer already exists
- Contact existing customer

Invalid Email Format

Error: "Please enter a valid email address"

Cause: Email format incorrect

Examples:

- Missing @
- Invalid domain
- Special characters

Solution: Correct email format

Required Fields Missing

Error: "This is a required field"

Cause: Required field empty

Solution: Fill all required fields (marked with *)

VAT Number Invalid

Error: "Invalid VAT number"

Cause: VAT format incorrect or not verified

Solution:

- Check VAT format for country
- Verify with VIES (EU)
- Contact customer for correct VAT

Best Practices

Data Quality

Ensure:

- Correct email address
- Valid phone number
- Complete address
- Correct customer group
- Valid VAT number

Verify:

- Ask customer to confirm email
- Test phone number
- Verify company name
- Check VAT number

Customer Groups

Strategy:

- Define clear group criteria
- Document group benefits
- Train staff on selection
- Review assignments regularly

Examples:

```
Wholesale: Min order $500, Net 30 terms
Retailer: Min order $200, Net 15 terms
VIP: No minimum, Net 60 terms, 5% discount
```

Security

Password Policy:

- Use email invitation when possible
- Strong password requirements
- Never share passwords via insecure channels
- Customer changes password on first login

Data Protection:

- Verify customer identity
- Comply with GDPR/privacy laws
- Secure data transmission
- Regular data audits

Workflow

Efficient Process:

1. Collect customer information (phone, email, meeting)
2. Verify information
3. Create account in system
4. Send welcome email
5. Follow up to confirm receipt
6. Assist with first order

Bulk Customer Creation

Requires: MageB2B_StaffImportExport add-on

Import Customers

Process:

1. Download CSV template
2. Fill customer data
3. Upload CSV file
4. Map fields
5. Validate data
6. Import customers

CSV Format:

```
firstname,lastname,email,phone,company,customer_group,vat_number
John,Doe,john@example.com,555-0123,Acme Corp,Wholesale,DE123456789
Jane,Smith,jane@example.com,555-0124,Beta Inc,Retailer,DE987654321
```

Benefits

- Fast bulk onboarding

- Consistent data format
- Reduced errors
- Time savings

Mobile / Headless Integrations

Requires: MageB2B_StaffApi add-on

If you want to build a custom mobile app or integrate an external system, the Staff API provides token-based authentication and staff/customer management endpoints. Features like OCR scanning, GPS tagging, attachments, or offline mode are app-side implementation details (not provided by the Magento module itself).

Integration

CRM Integration (External)

Sync with:

- Salesforce
- HubSpot
- Zoho CRM
- Microsoft Dynamics

Sync Options:

- One-way (Magento → CRM)
- Two-way (bidirectional)
- Real-time
- Scheduled

ERP Integration (External)

ERP integration is typically implemented via REST/API middleware or custom Magento integrations. A common pattern is to sync:

- customer master data
- payment terms
- pricing references / external customer IDs

Reporting

Customer Creation Report

Metrics:

- Customers created per staff
- Customers created per period
- Customer group distribution
- Conversion rate (created → ordered)

Location: Reports > Staff > Customer Creation

Troubleshooting

Cannot Create Customer

Check:

1. Staff permission: "Can create Customer" = Yes
2. Configuration: "Enable creating new customer" = Yes
3. Staff account is active
4. No validation errors

Email Not Sent

Check:

1. Email configuration correct
2. Email template configured
3. Customer email valid
4. SMTP settings correct

Customer Not Assigned to Staff

Check:

1. Auto-assignment enabled
2. Staff session active
3. No errors during creation
4. Configuration scope and assignment settings

Next Steps

- Customer Assignment →
- Customer Impersonation →
- Staff Groups →

Customer Impersonation

Sales Staff Extension · /staff/features/customer-impersonation

Learn how sales staff can securely log into customer accounts to place orders and manage customer needs.

Overview

Customer Impersonation allows staff to:

- Log into customer accounts securely
- Place orders on behalf of customers
- Edit cart item prices
- Access customer dashboard
- View order history
- Manage customer addresses

How It Works

Security Model

Separate Sessions:

- Staff session remains active
- Customer session created temporarily
- Staff context maintained throughout
- Easy exit from customer context

Audit Trail:

- Orders tagged with staff ID
- Staff information stored in order
- Commission automatically calculated
- Full traceability

Access Control

Staff Must Have:

- Active staff account
- Customer assigned to staff (or "Access All Customers")
- Permission to impersonate

Customer Requirements:

- Active customer account
- Staff has assignment/access permission to the customer
- Not blocked or suspended

Impersonation Process

Step 1: Login as Staff

Navigate to: `https://yourstore.com/staff/account/login`

Enter credentials:

- Email
- Password

Step 2: Find Customer

Go to **Customers**

Search for customer:

- By name
- By email
- By customer ID
- By external ID

Step 3: Start Customer Context

Use the customer login action (tooltip: **Login to this account**)

What Happens:

1. Staff session saved
2. Customer session created
3. Redirect to customer dashboard
4. Customer-context indicator may be shown (theme-dependent)

Step 4: Perform Actions

As customer, you can:

- Browse products
- Add to cart
- Edit cart (including prices if enabled)
- Proceed to checkout
- Place order
- View order history
- Manage addresses
- Update account information

Step 5: Exit Customer Context

Click **Logout from current customer** (top banner/header)

What Happens:

1. Customer session ended
2. Staff session restored

3. Redirect to staff dashboard
4. Order appears in "My Orders"

Editing Cart Prices

Enable Price Editing

Staff Account Configuration:

- **Can Edit Item Price**: Yes

System Configuration:

- **Allow 0 Price on Item Price Edit**: Yes/No

Edit Price Process

1. Login as customer
2. Add products to cart
3. Go to shopping cart
4. Find **Edit Price** field next to each item
5. Enter new price
6. Click **Update**
7. Proceed to checkout

Price Editing Rules

Allowed:

- Reduce price (discount)
- Increase price (if needed)
- Set to zero (if configured)

Not Allowed:

- Negative prices
- Non-numeric values

Use Cases for Price Editing

Discounts:

- Volume discounts
- Loyalty discounts
- Promotional pricing
- Price matching

Adjustments:

- Custom quotes
- Special agreements
- Contract pricing
- Damaged goods

Free Items:

- Samples
- Replacements
- Promotional items
- Warranty replacements

Pricesystem Integration

Requires: MageB2B_PricesystemCore

Alternative Prices

Configuration:

- **Display additional pricesystem prices**: Yes

Behavior:

- Dropdown shows alternative prices
- Select from:
  - Customer-specific prices
  - Category prices
  - Pricelist prices
  - Product-customer matrix prices

Benefit: Quick price selection without manual entry

Price Selection

1. Login as customer
2. Add product to cart
3. Click **Edit Price** dropdown
4. Select from available prices:
   - Base Price: $100.00
   - Customer Price: $95.00
   - Pricelist A: $90.00
   - Volume Price: $85.00
5. Price automatically applied

Order Placement

Order Assignment

Automatic:

- Order tagged with staff ID
- Staff group assigned
- Commission calculated
- Order comment added

Order Data:

- Staff assignment information

- Staff group information
- Commission amount

Commission Calculation

Based on Configuration:

- Total excluding tax
- Total including tax
- Product discount

Example:

Field	Value
Order Subtotal	$500.00
Staff Commission	5%
Commission Amount	$25.00

Order Confirmation

Customer Receives:

- Order confirmation email
- Standard order details

Staff Receives (if configured):

- Order confirmation copy
- Commission information
- Customer details

Frontend Interface

Staff Indicator

When impersonating, top banner shows:

```
┌─────────────────────────────────────────────┐
│ You are logged in as: John Doe              │
│ Staff: Sarah Johnson                        │
│ [Logout from current customer]              │
└─────────────────────────────────────────────┘
```

Available Actions

Customer Dashboard:

- My Orders
- My Addresses
- Account Information
- Wishlist

- Newsletter Subscriptions

Shopping:

- Browse catalog
- Search products
- Add to cart
- Apply coupons
- Checkout

Restrictions:

- Cannot change customer password
- Cannot delete customer account
- Cannot access restricted pages (if configured)

Access Restrictions

Not Allowed Handles

Configuration: Stores > Configuration > MageB2B > Staff > General

- **Not allowed handles**: Define restricted pages

Example:

```
customer_account_edit
customer_address_delete
wishlist_index_remove
```

Behavior:

- Staff redirected if accessing restricted page
- Error message displayed
- Logged in audit trail

Use Cases

Restrict:

- Password changes
- Account deletion
- Payment method management
- Sensitive customer data

Session Management

Session Lifetime

Configuration:

- **Session lifetime (seconds)**: 900 (default)

Behavior:

- Staff session expires after inactivity
- Customer impersonation ends
- Staff must re-login

Recommendation:

- 3600 (1 hour) for security
- 7200 (2 hours) for convenience

Multiple Impersonations

Scenario: Staff needs to switch between customers

Process:

1. Click **Logout from current customer**
2. Search for new customer
3. Use the customer login action for the new customer
4. Previous customer session ended

Note: Only one customer impersonation at a time

Security Features

Audit Trail

Logged Information:

- Staff ID who placed order
- Timestamp of impersonation
- Customer ID accessed
- Actions performed
- Price changes made

Access: Admin > System > Action Logs (if enabled)

Password Protection

Staff Cannot:

- View customer passwords
- Change customer passwords
- Access password reset tokens

Customer Security Maintained:

- Passwords remain encrypted
- No password exposure
- Secure authentication

IP Tracking

Optional: Track IP addresses

- Staff IP logged
- Customer IP logged
- Detect suspicious activity

Best Practices

For Field Sales

Workflow:

1. Visit customer on-site
2. Login as staff on mobile device
3. Impersonate customer
4. Review products together
5. Add items to cart
6. Apply negotiated pricing
7. Complete order
8. Click **Logout from current customer**

For Phone Sales

Workflow:

1. Customer calls with order
2. Staff searches customer
3. Login as customer
4. Add items per customer request
5. Apply discounts if needed
6. Read order total to customer
7. Complete order
8. Confirm order number

For Customer Service

Workflow:

1. Customer reports issue
2. Staff accesses customer account
3. Review order history
4. Place replacement order
5. Apply discount or free shipping
6. Complete order
7. Document in customer comment

Troubleshooting

Cannot Start Customer Context

Check:

1. Customer is assigned to staff
2. Staff has "Access All Customers" OR customer assigned

3. Customer account is active
4. Access/scope configuration allows the customer context
5. Staff account is active

Price Editing Not Available

Check:

1. Staff account: "Can Edit Item Price" = Yes
2. Configuration: Price editing enabled
3. Product is not virtual/downloadable (if restricted)

Session Expired

Issue: Staff session expires during impersonation

Solution:

1. Staff automatically logged out
2. Customer session ended
3. Staff must re-login
4. Cart may be lost (depends on configuration)

Prevention: Increase session lifetime

Order Not Assigned to Staff

Check:

1. Staff was logged in during order
2. Customer impersonation was active
3. Order not placed by customer directly
4. Configuration: "Set staff permanently on order"

Advanced Features

Token-Based Login

Requires: Staff Token Service

Use Case: Email links for quick customer access

Process:

1. Generate token for customer
2. Send email with login link
3. Staff clicks link
4. Automatically logged into customer account

API Integration

Requires: MageB2B_StaffAPI

Use Case: Mobile apps, external systems

Endpoints:

- POST /V1/staff/token
- POST /V1/staff/customers/:customerId/token

Next Steps

Learn about commission tracking:

Commission System →

Order Management

Sales Staff Extension · /staff/features/order-management

Learn how staff orders are tracked, managed, and reported in the system.

Overview

The Order Management system:

- Automatically tags orders with staff information
- Tracks commission per order
- Enables order filtering by staff
- Provides order history per staff
- Supports order reassignment

Automatic Order Tagging

Order Fields

Added to Every Order:

- Staff member assignment
- Staff group assignment
- Commission amount

Visible In:

- Admin order view
- Order grid
- Order reports
- Order API

When Orders Are Tagged

Scenario 1: Staff Places Order

- Staff logs into customer account
- Places order
- Order automatically tagged with staff ID

Scenario 2: Customer Places Order

- Customer orders directly
- If "Set staff permanently on order" = Yes
- Order tagged with customer's primary staff

Scenario 3: Admin Places Order

- Admin can select staff member
- Order tagged with selected staff

View Staff Orders

Frontend (Staff Dashboard)

Location: Staff Account > My Orders

Display:

- Order number
- Customer name
- Order date
- Order total
- Commission earned
- Order status

There is no dedicated frontend filter panel on the My Orders page in the current implementation.

Admin (Order Grid)

Location: Sales > Orders

Staff Column (if enabled):

- Shows staff name
- Filterable
- Sortable

Enable: Configuration > Admin Settings > Add Sales Staff to Order Grid = Yes

Order Details

Staff Information Section

In Order View:

```
Sales Staff Information
├── Staff Member: John Smith
├── Staff Group: Territory North
├── Commission: $50.00
└── Commission Rate: 5%
```

Order Comments

Automatic Comment:

```
Sales Staff John Smith earned a commission of $50.00.
```

Added When: Order is placed

Order Reassignment

Enable Feature

Configuration: Stores > Configuration > MageB2B > Staff > Admin Settings

Setting: **Add Reassign feature for Sales Staff to Order Grid** = Yes

Reassign Process

Steps:

1. Go to Sales > Orders
2. Select orders (checkboxes)
3. Actions > **Reassign Sales Staff**
4. Select new staff member
5. Click **Submit**

What Happens:

- Staff assignment updated
- Staff group assignment updated
- Existing commission stays as-is (the reassignment action does not recalculate it)

Use Cases:

- Staff member leaves
- Territory changes
- Workload balancing
- Error correction

Bulk Reassignment

Scenario: Reassign all orders from Staff A to Staff B

Process:

1. Filter orders by Staff A
2. Select all orders
3. Reassign to Staff B
4. Confirm

Result: All orders transferred

Commission Tracking

Per Order

View Commission:

- Order detail page
- Order grid (if column added)
- Staff dashboard
- Commission reports

Admin Order Create (Optional)

When creating an order from the Magento Admin (Sales > Orders > Create New Order), you can optionally set:

- Sales staff
- Sales staff commission (manual override)

This is mainly useful for phone/manual orders created by your back office team.

Order Filtering

By Staff Member

Admin:

1. Go to Sales > Orders
2. Filter by "Sales Staff"
3. Select staff member
4. Apply filter

Staff Dashboard:

- Automatically filtered to own orders
- Can filter by customer, date, status

By Staff Group

The admin sales order grid provides a **Sales Staff** column/filter in this module. Direct filtering by **Sales Staff Group** is not available by default.

By Date Range

Common Filters:

- Today
- This week
- This month
- This quarter
- This year
- Custom range

Order Statistics

Staff Dashboard

Metrics:

- Total orders
- Orders this month
- Total sales
- Average order value
- Commission earned

- Pending orders

Charts:

- Orders over time
- Sales trend
- Commission trend
- Top customers

Admin Reports

Built into the core Staff feature set.

Location (Admin): Staff > Reports > Orders / Products

Available Reports:

- Orders by staff
- Orders by group
- Orders by period
- Commission by order
- Average order value

Email Notifications

Order Confirmation to Staff

Configuration: Stores > Configuration > MageB2B > Staff > Email

Settings:

- **Email order to**: Customer, Staff, Customer and Staff, Customer from quote and Staff, or Staff from quote and Customer
- **Sent email copy to staff when customer is placing an order**: Yes/No

Email Contains:

- Order details
- Customer information
- Commission amount
- Order total

Order Status Updates

Magento's core order status emails are controlled by Magento's Sales Email configuration and your email templates. The Staff extension can additionally send staff copies depending on your **Email order to** and **Sent email copy to staff...** configuration.

Order Export

Export Staff Orders

There is no built-in export control on the frontend **My Orders** page in the current implementation.

From Admin:

1. Filter orders by staff
2. Select orders
3. Actions > Export
4. Choose format

Use Cases:

- Commission calculation
- Performance review
- Accounting
- Tax reporting

Integration

Accounting Software

Sync Orders:

- QuickBooks
- Xero
- Sage
- FreshBooks

Data Synced:

- Order totals
- Commission amounts
- Staff information
- Customer data

ERP Systems

ERP integrations are typically implemented via middleware or custom Magento integrations. Common data points:

- order details
- staff assignment
- commission amount

Best Practices

Order Tracking

Ensure:

- All orders tagged with staff
- Commission calculated correctly
- Order status updated
- Staff notified

Commission Management

Process:

- Review commission calculations periodically
- Align commission payout rules with your internal accounting process

Performance Monitoring

Track:

- Orders per staff
- Sales per staff
- Commission per staff
- Conversion rates
- Average order value

Troubleshooting

Order Not Tagged with Staff

Check:

1. Staff was logged in during order
2. Customer impersonation was active
3. "Set staff permanently on order" setting
4. Staff information visible in order details

Commission Not Calculated

Check:

1. Staff commission rate set
2. Commission type configured
3. Order not canceled
4. Calculation method correct

Cannot Reassign Orders

Check:

1. Reassign feature enabled
2. Admin permissions
3. Orders selected
4. Staff member exists

Next Steps

- Commission System →
- Reports →
- Staff Groups →

Reports

Sales Staff Extension · /staff/features/reports

Reports are part of the core Staff functionality and no longer treated as a separate add-on.

Overview

Staff reporting helps you analyze sales activity created in staff context:

- Order-focused reporting
- Product-focused reporting
- Staff/team performance tracking

Available Report Views

When enabled, staff users can access report links in their account navigation:

- **Order sales report**
- **Product sales report**

> Screenshot placeholder: Staff account navigation with report links

Configuration

Location: **Stores > Configuration > MageB2B > Staff > Report settings**

- **Show report links in frontend**
  - Default: `Yes`
  - When enabled, report links are shown in staff account navigation.

Admin Access

Ensure the admin role has Staff report permissions:

- Access to Staff report section
- Access to order report pages
- Access to product report pages

Typical Use Cases

- Compare sales volume per staff member
- Review top-selling products in staff-driven orders
- Track commission-related performance trends
- Analyze period-over-period order activity

Related

- Commission System
- Order Management
- Staff Groups

Staff Groups

Sales Staff Extension · /staff/features/staff-groups

Learn how to organize your sales team using staff groups for better management and reporting.

Overview

Staff Groups are a simple way to categorize staff accounts (for example by territory or team). A staff group name is stored on staff accounts and carried into staff-related order context for reporting.

Use Staff Groups to:

- Organize staff by territory, department, or function
- Filter staff in Admin lists and reports
- Group orders by staff team (especially useful with Staff > Reports screens)
- Use a stable group id for integrations (for example SAML mapping)

Create Staff Group

Navigate to Groups

Location: Staff > Staff Groups (Admin)

Add New Group

1. Click **Add New**
2. Enter **Name**: e.g., "Territory North"
3. Click **Save**

Group Names Examples:

- Territory North
- Territory South
- Inside Sales
- Field Sales
- Customer Service
- VIP Account Managers
- Product Specialists

Assign Staff to Groups

During Staff Creation

1. Create new staff account
2. Select **Staff Group** from dropdown
3. Save staff account

Edit Existing Staff Account

1. Edit staff account
2. Change **Staff Group**

3. Save

Note: A staff account can only belong to one group at a time.

Default Staff Group

Configure Default

Location: Stores > Configuration > MageB2B > Staff > General

Setting: **Default Staff Group**

Behavior:

- New staff automatically assigned to default group
- Can be changed during creation
- Can be changed later

Use Case: Assign all new staff to "General" group initially

How Groups Are Used (In Practice)

Orders: Group Context

When an order is assigned to a staff account, the system also stores staff group context on the order. This allows:

- grouping/analysis in reporting tools

Integrations (Example: SAML)

Some add-ons (like SAML) can use group ids as stable identifiers for mapping "roles" to staff attributes.

Reporting

Group Reports:

- Sales by group
- Commission by group
- Orders by group
- Customer distribution by group
- Performance comparison

Tip: Reporting screens are available in core (Admin: Staff > Reports).

Use Cases

Geographic Territories

Structure:

```
├── Territory North
```

```
│   ├── Staff 1
│   ├── Staff 2
│   └── Staff 3
├── Territory South
│   ├── Staff 4
│   └── Staff 5
└── Territory West
    ├── Staff 6
    └── Staff 7
```

Benefits:

- Clear territory ownership
- Regional performance tracking
- Territory-based goals
- Resource allocation

Functional Teams

Structure:

```
├── Inside Sales
│   ├── Phone Sales Rep 1
│   ├── Phone Sales Rep 2
│   └── Email Sales Rep
├── Field Sales
│   ├── Field Rep 1
│   └── Field Rep 2
└── Customer Service
    ├── Support Rep 1
    └── Support Rep 2
```

Benefits:

- Role-based organization
- Function-specific metrics
- Skill-based assignment
- Training coordination

Product Lines

Structure:

```
├── Electronics Team
│   ├── Electronics Specialist 1
│   └── Electronics Specialist 2
├── Furniture Team
│   ├── Furniture Specialist 1
│   └── Furniture Specialist 2
└── Clothing Team
    └── Clothing Specialist
```

Benefits:

- Product expertise
- Category performance
- Specialized training
- Inventory planning

Hierarchical Structure

Structure:

```
├── Senior Sales (Managers)
│   ├── Territory Manager North
│   └── Territory Manager South
├── Mid-Level Sales
│   ├── Senior Rep 1
│   ├── Senior Rep 2
│   └── Senior Rep 3
└── Junior Sales
    ├── Junior Rep 1
    ├── Junior Rep 2
    └── Junior Rep 3
```

Benefits:

- Career progression
- Mentorship structure
- Tiered commission
- Skill development

Group Management

Rename Group

1. Go to Staff Groups
2. Edit group
3. Change name
4. Save

Effect: All staff remain in the same group (only the name changes).

Delete Group

Groups can be deleted; related staff rows follow the configured database relation behavior.

Recommendation:

1. Reassign staff to another group first
2. Then delete the group if it is no longer needed

Best Practices

Group Structure

Keep It Simple:

- 3-7 groups ideal
- Clear naming
- Logical organization
- Easy to understand

Avoid:

- Too many groups (>10)
- Overlapping groups
- Confusing names
- Frequent changes

Group Assignment

Criteria:

- Geographic location
- Product expertise
- Experience level
- Customer type
- Sales channel

Documentation:

- Document group purpose
- Define assignment criteria
- Communicate changes
- Regular reviews

Performance Tracking

Set Goals:

- Group sales targets
- Commission goals
- Customer acquisition targets
- Activity goals

Monitor:

- Weekly progress
- Monthly reviews
- Quarterly analysis
- Annual planning

Integration

CRM Integration

Sync Groups:

- Map Magento groups to CRM teams
- Sync group assignments
- Share performance data

ERP Integration

If you sync staff groups to an external system, you typically use the group name/id as a stable reference (for example for cost center mapping).

Troubleshooting

Cannot Delete Group

Cause: Delete operation failed (for example due to custom business constraints or data/state issues)

Solution:

1. Check if staff currently reference the group
2. Reassign staff if needed
3. Retry delete and review logs on failure

Staff Not in Correct Group

Check:

1. Staff account group assignment
2. Recent changes
3. Default group setting

Solution: Edit staff, change group, save

Orders Not Tagged with Group

Check:

1. Staff has group assigned
2. Order placed after group assignment
3. Staff group information is visible in order data/reporting

Solution: Verify staff group, check order data

Next Steps

- Order Management →
- Commission System →
- Reports →

Api

Sales Staff Extension · /staff/addons/api

The Staff API add-on (`MageB2B_StaffApi`) exposes Staff CRUD endpoints via Magento Web API (REST/SOAP) so you can integrate ERP/CRM systems or automation scripts.

Installation

```
composer config bearer.repo.softwaresilo.io <token>
composer config repositories.softwaresilo composer
https://repo.softwaresilo.io/
composer require mageb2b/staff-api:*
php bin/magento module:enable MageB2B_StaffApi
php bin/magento setup:upgrade
php bin/magento cache:flush
```

Where to Find the Endpoints

- Magento Swagger UI: `https://<your-domain>/swagger`
- REST base URL: `https://<your-domain>/rest`

> Screenshot placeholder: Swagger UI showing Staff endpoints

Available REST Endpoints

The add-on registers the following endpoints:

- `GET /V1/staff/:staffId` – get a staff user by ID
- `GET /V1/staff/search` – search/list staff users (Magento `searchCriteria`)
- `POST /V1/staff` – create a staff user
- `PUT /V1/staff/:staffId` – update a staff user
- `DELETE /V1/staff/:staffId` – delete a staff user
- `POST /V1/staffcustomers` – assign customers to staff (payload-driven)
- `POST /V1/unassign-staffcustomers` – unassign customers from staff (payload-driven)
- `POST /V1/staff/token` – generate a token for a staff session context
- `GET /V1/staff/customers` – list customers for current staff context
- `GET /V1/staff/:staffId/customers` – list customers for a specific staff ID
- `POST /V1/staff/customers/:customerId/token` – generate impersonation token for a customer

Authentication / Permissions

Staff CRUD/assignment routes require admin/integration permissions for Staff management:

- Read permissions for staff data
- Write permissions for staff and assignments
- Delete permissions for staff cleanup

In practice you usually call these endpoints with an **Admin Token** or an **Integration Token** that has the matching permissions.

Note: token/customer-context routes in this module are exposed as anonymous at Web API level and enforce access in service logic.

Examples (REST)

Get a staff user by ID

```
curl -sS -H "Authorization: Bearer <ADMIN_TOKEN>" \
  "https://<your-domain>/rest/V1/staff/123"
```

Search staff users

```
curl -sS -H "Authorization: Bearer <ADMIN_TOKEN>" \
  "https://<your-domain>/rest/V1/staff/search?searchCriteria[pageSize]=20"
```

Create a staff user

```
curl -sS -H "Authorization: Bearer <ADMIN_TOKEN>" \
  -H "Content-Type: application/json" \
  -X POST "https://<your-domain>/rest/V1/staff" \
  -d '{
    "staff": {
      "firstname": "John",
      "lastname": "Smith",
      "email": "john.smith@example.com",
      "phone": "+1 555-0123",
      "status": 1,
      "website_id": 1
    }
  }'
```

Notes

- Exact payload fields depend on your installed Staff add-ons (e.g. order editing, quotes).
- For bulk operations, consider the Import/Export Add-On.

Customer History

Sales Staff Extension · /staff/addons/customer-history

The Customer History add-on (`MageB2B_StaffCustomerHistory`) adds a structured customer history/timeline for staff users, including configurable topics, attachments, and optional email alerts.

Installation

```
composer config bearer.repo.softwaresilo.io <token>
composer config repositories.softwaresilo composer
https://repo.softwaresilo.io/
composer require mageb2b/staff-customerhistory:*
php bin/magento module:enable MageB2B_StaffCustomerHistory
php bin/magento setup:upgrade
php bin/magento cache:flush
```

What It Adds

- Customer history entries with configurable **topics** (label + color)
- Optional automatic entries when staff places an order
- File attachments with allowed extensions + limits
- Optional email alert template
- Admin UI components (grid/form) and frontend staff pages

> Screenshot placeholder: customer history timeline inside staff customer view

Configuration

Location: **Stores > Configuration > MageB2B > Staff > Customer history**

Defaults:

- `staff/history/add_order_history_as_customer_history` (default: `No`)
- `staff/history/topics` (default: preconfigured list like General, Support, Quote, Sales, …)
- `staff/history/customer_rating_rules` (default: JSON rule list)
- `staff/history/customer_rating_default` (default: `New`)
- `staff/history/allowed_extensions` (default: `pdf,doc,docx,odt,xls,csv,jpg,jpeg,png`)
- `staff/history/files_upload_path` (default: `customer_history`)
- `staff/history/maximum_file_size` (default: empty = system limit)
- `staff/history/max_files_per_entry` (default: 5)
- `staff/history/allow_delete_own_history` (default: `Yes`)

Location: **Stores > Configuration > MageB2B > Staff > Email settings**

- `staff/email/history_email_alert` (default: `staff_email_history_email_alert`)

Topics

Topics are defined in configuration as a list of objects (code, value, color). Example:

```
[
  {"code":"support","value":"Support","color":"#3b82f6"},
  {"code":"quote","value":"Quote","color":"#11b981"}
]
```

File Attachments

- Allowed file types are controlled via `staff/history/allowed_extensions`
- Maximum files per entry is controlled via `staff/history/max_files_per_entry`
- Base upload path is controlled via `staff/history/files_upload_path`

Notes

- If you want order actions to appear as history, enable `Add order history as customer history`.
- For heavy attachments usage, consider setting a `maximum_file_size` and restricting extensions.

Customer Visits

Sales Staff Extension · /staff/addons/customer-visit

The Customer Visit add-on (`MageB2B_StaffCustomerVisit`) adds visit planning for staff accounts, including visit creation, calendar views, and customer email links (confirm/cancel) for visits.

Installation

```
composer config bearer.repo.softwaresilo.io <token>
composer config repositories.softwaresilo composer
https://repo.softwaresilo.io/
composer require mageb2b/staff-customervisit:*
php bin/magento module:enable MageB2B_StaffCustomerVisit
php bin/magento setup:upgrade
php bin/magento cache:flush
```

Admin: Manage Visits

Admin menu:

- **Staff > Staff Visits**

> Screenshot placeholder: Admin visit grid + visit editor

Staff Frontend: Calendar Integration

The module adds calendar-related pages for staff users (including a settings page) and can synchronize visits to external calendars.

> Screenshot placeholder: Staff calendar integration settings page

Configuration

Visit Settings

Location: **Stores > Configuration > MageB2B > Staff > Visit Settings**

Defaults:

- Inform customer (`staff/visit/inform_customer`): `Yes`
- Allow accept invitation (`staff/visit/accept_invitation`): `Yes`
- Default visit status (`staff/visit/default_status`): `planned`
- Default visit type (`staff/visit/default_visit_type`): `onsite`
- Closest visits days range (`staff/visit/closest_days_range`): `30`

- ICS token expiry (`staff/visit/ics_token_expiry_days`): `30`
- Customer action link expiry (`staff/visit/customer_action_link_expiry_days`): `30`
- Show upcoming visits in customer dashboard (`staff/visit/show_upcoming_visits_in_dashboard`): `Yes`
- Show recent visits in customer dashboard (`staff/visit/show_recent_visits_in_dashboard`): `Yes`

Calendar Integration

Location: **Stores > Configuration > MageB2B > Staff > Calendar Integration**

Key settings:

- Enable external calendar synchronization (`staff/calendar_integration/sync_enabled`)
- Provider (`staff/calendar_integration/sync_provider`): `google` or `microsoft`

Depending on provider, configure OAuth credentials (encrypted in Magento config):

- Google: Client ID/Secret, Redirect URI, Calendar ID
- Microsoft: Client ID/Secret, Tenant ID, Redirect URI, Calendar User ID

Emails and Templates

The module adds visit-related email templates. It also uses the global allowlist `staff/email/enabled_templates`.

If a visit email is not sent, verify the template is activated in:

- **Stores > Configuration > MageB2B > Staff > Email settings > Activated Emails**

Important template ids:

- `staff_visit_created`
- `staff_visit_updated`
- `staff_visit_cancelled`
- `staff_visit_customer_cancelled`
- `staff_visit_reminder`
- `staff_visit_inform`
- `staff_visit_approve`

Notes

- Customer confirm/cancel links are time-limited (see expiry settings).
- For external sync, make sure your OAuth redirect URLs match the values in Magento configuration.

Graphql

Sales Staff Extension · /staff/addons/graphql

The GraphQL add-on extends Staff-related functionality for GraphQL-based storefronts and integrations.

Package

- Composer package: `mageb2b/staff-graph-ql`

Installation

```
composer config bearer.repo.softwaresilo.io <token>
composer config repositories.softwaresilo composer
https://repo.softwaresilo.io/
composer require mageb2b/staff-graph-ql:*
php bin/magento setup:upgrade
php bin/magento cache:flush
```

What It Enables

- GraphQL access for Staff-related use cases (scope depends on installed module version)
- Better integration for headless storefronts
- Reuse of staff context in GraphQL workflows

Verification

- Ensure the module is enabled in Magento
- Run a GraphQL schema introspection in your environment
- Confirm Staff-related types/fields are available for your installed version

Related

- API Integration
- Hyvä Compatibility

Hyva

Sales Staff Extension · /staff/addons/hyva

If your storefront uses the Hyvä theme, install the Staff Hyvä compatibility add-on to ensure Staff pages and navigation render correctly.

Installation

```
composer config bearer.repo.softwaresilo.io <token>
composer config repositories.softwaresilo composer
https://repo.softwaresilo.io/
composer require mageb2b/staff-hyva:*
php bin/magento module:enable MageB2B_StaffHyva
php bin/magento setup:upgrade
php bin/magento cache:flush
```

What It Does

This add-on provides Hyvä-compatible layouts/view models for common Staff pages (login, dashboard, account navigation).

> Screenshot placeholder: Hyvä staff dashboard

Import Export

Sales Staff Extension · /staff/addons/import-export

The Import/Export add-on (`MageB2B_StaffImportExport`) adds **bulk tooling** for staff accounts:

- Export selected staff users from the **Admin grid** as CSV
- Import staff users from a CSV via a **CLI command**

Installation

```
composer config bearer.repo.softwaresilo.io <token>
composer config repositories.softwaresilo composer
https://repo.softwaresilo.io/
composer require mageb2b/staff-importexport:*
php bin/magento module:enable MageB2B_StaffImportExport
php bin/magento setup:upgrade
php bin/magento cache:flush
```

Admin Export (Grid Mass Action)

After enabling the module you get an **Export** mass action in:

- **Staff > All Staff**

Workflow:

1. Select one or more staff users in the grid
2. Choose **Export**
3. Magento downloads a generated CSV

> Screenshot placeholder: Staff grid with “Export” mass action

Export Format Notes

- Passwords are **not** exported.

CLI Import

The module provides a CLI command:

```
php bin/magento staff:import-staff <path-to-csv> --behavior=add_update
```

Supported behaviors:

- `append`
- `add_update`
- `replace`

- `delete`

Optional flags:

- `--field_separator=,`
- `--field_multiple_value_separator=,`
- `--fields_enclosure=0`
- `--delete_file_after_import=1` (defaults to 1)

> Screenshot placeholder: CLI import run + resulting staff users in admin grid

Import Settings

Location: **Stores > Configuration > MageB2B > Staff > Import settings**

- `staff/import/send_email_on_new_account_creation`
  - Default: `No`
  - If enabled, imported staff users receive the “new account” email after a successful import.

Sample CSV

A sample CSV file is shipped with the module:

- `vendor/mageb2b/staff-importexport/Files/Sample/staff.csv`

Tip: Export a few existing staff accounts and use that CSV as your template (this avoids missing fields).

Order Management

Sales Staff Extension · /staff/addons/order-management

The Order Management add-on (`MageB2B_StaffOrderManagement`) enables **order editing** from the staff frontend (for assigned customers), including an “edit order mode” workflow.

Installation

```
composer config bearer.repo.softwaresilo.io <token>
composer config repositories.softwaresilo composer
https://repo.softwaresilo.io/
composer require mageb2b/staff-ordermanagement:*
php bin/magento module:enable MageB2B_StaffOrderManagement
php bin/magento setup:upgrade
php bin/magento cache:flush
```

What It Adds

- A permission/flag per staff user: `can_edit_orders`
- Frontend routes to enter/exit order edit mode and to save order comments
- A configuration section for allowed states and rule bypasses (min qty / min order amount / backorders)

> Screenshot placeholder: “Edit order” action in staff order view

Admin Setup (Per Staff User)

1. Go to **Staff > All Staff**
2. Edit a staff user
3. Enable **Can edit orders** (field name may vary by UI)

Configuration

Location: **Stores > Configuration > MageB2B > Staff > Order edit**

- `staff/order_edit/allowed_order_state`
  - Select which order states are editable (e.g. `new`)
- `staff/order_edit/disregard_min_qty_min_sale_qty`
  - Allow staff orders that ignore min qty / min sale qty rules
- `staff/order_edit/disregard_min_order_amount`
  - Allow staff orders that ignore minimum order amount rules
- `staff/order_edit/allow_backorders`
  - Allow staff to order with backorders even if disabled for customers

Email Template

Location: **Stores > Configuration > MageB2B > Staff > Email settings**

- `staff/email/staff_edited_order_template`
    - Template used when a staff user edited an order.

Notes

- Order editing is additionally restricted by the configured allowed order states.
- This add-on does not change admin order editing; it targets staff frontend workflows.

Quote Management

Sales Staff Extension · /staff/addons/quote-management

The Quote add-on (`MageB2B_StaffQuote`) adds a complete quote workflow around staff accounts:

- Staff can create and manage quotes for customers
- Customers can request quotes and view/accept/reject them
- Attachments, quote history, PDFs, and expiry reminders
- Admin management (grid + quote detail view)

Installation

```
composer config bearer.repo.softwaresilo.io <token>
composer config repositories.softwaresilo composer
https://repo.softwaresilo.io/
composer require mageb2b/staff-quote:*
php bin/magento module:enable MageB2B_StaffQuote
php bin/magento setup:upgrade
php bin/magento cache:flush
```

Admin: Staff Quotes

Admin menu:

- **Staff > Staff Quotes**

> Screenshot placeholder: Admin staff quote grid

Staff Frontend: Quote Workspace

The add-on registers staff pages under the `staffquote` frontend routes (examples):

- Quote list / dashboard
- Quote view + edit
- Quote PDF export
- Attachments management
- Customer search + product search helpers

> Screenshot placeholder: Staff quote list (frontend)

Customer Frontend: Quote Requests & Customer Quote View

Customers get pages and actions (examples):

- Request quote

- View quote
- Accept / reject
- Download attachments (if enabled)
- Create order from quote (optional, configurable)

> Screenshot placeholder: Customer quote request form

Configuration

Location: **Stores > Configuration > MageB2B > Staff > Quote**

Key settings (defaults shown):

- `staff/quote/show_request_menu` (default: `Yes`) – show quote request menu for customers
- `staff/quote/quote_expiry_days` (default: `30`)
- `staff/quote/enable_expiry_reminder` (default: `Yes`)
- `staff/quote/reminder_days_before` (default: `3`)
- `staff/quote/quote_number_format` (default: `Q-{increment_id}`)
- PDF settings:
    - `staff/quote/pdf_logo_path`
    - `staff/quote/pdf_company_name`
    - `staff/quote/pdf_company_address`
    - `staff/quote/pdf_company_contact`
    - `staff/quote/pdf_footer_text`
- Customer options:
    - `staff/quote/allow_customer_create_order` (default: `No`)
    - `staff/quote/show_history_customer_quote` (default: `No`)
    - `staff/quote/allow_customer_attachments` (default: `Yes`)
    - `staff/quote/allowed_extensions`
    - `staff/quote/max_attachment_size_mb`
    - `staff/quote/max_attachments_per_quote`

Location: **Stores > Configuration > MageB2B > Staff > Email settings**

- `staff/email/attach_pdf_to_customer`
- `staff/email/attach_quote_attachments`
- `staff/email/max_total_attachments_mb`
- Quote email templates:
    - `staff/email/quote_template`
    - `staff/email/quote_to_customer_template`
    - `staff/email/quote_status_update_template`
    - `staff/email/quote_expiry_reminder_template`
    - `staff/email/quote_internal_notification_template`
    - `staff/email/customer_quote_request_template`

> Screenshot placeholder: Quote configuration section

Cron Jobs

The module includes cron jobs for:

- Expiring quotes
- Sending expiry reminders

Make sure Magento cron is running on production.

Quote Sample Data

Sales Staff Extension · /staff/addons/quote-sample-data

Use this package to load demo quote data for Staff Quote workflows.

Package

- Composer package: `mageb2b/staff-quote-sample-data`
- Requires Staff Quote add-on

Installation

```
composer config bearer.repo.softwaresilo.io <token>
composer config repositories.softwaresilo composer
https://repo.softwaresilo.io/
composer require mageb2b/staff-quote-sample-data:*
php bin/magento module:enable MageB2B_StaffQuoteSampleData
php bin/magento setup:upgrade
php bin/magento cache:flush
```

Verification

- Open staff quote screens in admin/frontend
- Confirm demo quote records are present

Related

- Quote Management
- Sample Data

Reports

Sales Staff Extension · /staff/addons/reports

Reports are documented as a core feature now.

Use:

- Reports & Analytics

Reason:

- Reporting is integrated directly into Staff core and is no longer documented as a standalone add-on.

Saml

Sales Staff Extension · /staff/addons/saml

The SAML add-on (`MageB2B_StaffSaml`) allows staff users to authenticate via an external Identity Provider (IdP), such as Azure AD / Entra ID or other SAML 2.0 providers.

Installation

```
composer config bearer.repo.softwaresilo.io <token>
composer config repositories.softwaresilo composer
https://repo.softwaresilo.io/
composer require mageb2b/staff-saml:*
php bin/magento module:enable MageB2B_StaffSaml
php bin/magento setup:upgrade
php bin/magento cache:flush
```

Configuration Location

Go to **Stores > Configuration > MageB2B > Staff > SAML settings**

> Screenshot placeholder: SAML settings section

Key Settings

General settings

- **Enable SAML Single sign-on** (`staff/saml/general/enable`)
- **Disable login with username/password** (`staff/saml/general/disable_password_login`)
- **Group to attributes mapping** (`staff/saml/general/group_attributes_mapping`)
    - JSON mapping between group ids and staff attributes.
    - Example:

    ```
    {
      "1": {"access_all_customers": 1, "can_create_customer": 1,
    "can_edit_item_price": 1},
      "2": {"access_all_customers": 0, "can_create_customer": 1,
    "can_edit_item_price": 0}
    }
    ```

- **Default Group Value** (`staff/saml/general/default_group`)
- **Login Button Text** (`staff/saml/general/login_button_text`)

Identity provider settings

- **SP Identifier** (`staff/saml/config/sp_identifier`)

- **IDP Identifier** (`staff/saml/config/idp_identifier`)
- **IDP Login Url** (`staff/saml/config/idp_login_url`)
- **IDP Logout Url** (`staff/saml/config/idp_logout_url`)
- **IDP Public Certificate** (`staff/saml/config/idp_cert`) (Base64)

Main attributes mapping

These fields define which attribute paths are used for user provisioning/mapping:

- Email (`staff/saml/main_attributes_mapping/email`)
- Firstname (`staff/saml/main_attributes_mapping/firstname`)
- Lastname (`staff/saml/main_attributes_mapping/lastname`)
- Group (`staff/saml/main_attributes_mapping/group`)
- Website Code (`staff/saml/main_attributes_mapping/website`)

IdP Callback / URLs

Typical URLs used by IdP configuration:

- **Reply URL (ACS)**: `https://<your-domain>/staff_saml/index/callback`
- **Logout URL**: `https://<your-domain>/staff_saml/index/logout`

Notes

- If you disable password login, make sure the SAML setup is fully working before rolling out to production (otherwise staff could get locked out).

Sample Data

Sales Staff Extension · /staff/addons/sample-data

Sample data modules help you evaluate and demo Staff features quickly on a staging/dev system.

Staff Sample Data

```
composer config bearer.repo.softwaresilo.io <token>
composer config repositories.softwaresilo composer
https://repo.softwaresilo.io/
composer require mageb2b/staff-sample-data:*
php bin/magento module:enable MageB2B_StaffSampleData
php bin/magento setup:upgrade
php bin/magento cache:flush
```

> Screenshot placeholder: demo staff accounts + demo staff groups

Staff Quote Sample Data (optional)

If you use the Quote add-on, you can also install quote sample data:

```
composer config bearer.repo.softwaresilo.io <token>
composer config repositories.softwaresilo composer
https://repo.softwaresilo.io/
composer require mageb2b/staff-quote-sample-data:*
php bin/magento module:enable MageB2B_StaffQuoteSampleData
php bin/magento setup:upgrade
php bin/magento cache:flush
```

> Screenshot placeholder: quote list with sample data populated

For a dedicated setup page, see:

- Quote Sample Data

Other Sample Data (optional)

Some installations also use a customer history sample-data module (`mageb2b/staff-customerhistory-sample-data`) if provided in your repository.

Two-Factor Authentication

Sales Staff Extension · /staff/addons/tfa

This page is an availability note.

In the currently audited codebase (`../magento248/vendor/mageb2b/staff*`), no `staff-tfa` module/package is present.

If your project includes a separate TFA add-on package, use that package's own docs and installed module config to determine:

- available features
- setup flow
- configuration paths
- recovery/reset process

Related

- Configuration

Common Issues

Sales Staff Extension · /staff/troubleshooting/common-issues

This guide covers the most common issues with the Sales Staff extension and how to resolve them.

Installation & Setup Issues

Module Not Showing in Admin

Symptom: Configuration page not visible after installation

Possible Causes:

1. Module not enabled
2. Cache not cleared
3. Permissions issue

Solution:

```
# Check module status
php bin/magento module:status MageB2B_Staff

# Enable if needed
php bin/magento module:enable MageB2B_Staff

# Run setup
php bin/magento setup:upgrade

# Clear cache
php bin/magento cache:flush

# Check admin permissions
# Admin > System > User Roles > Edit Role
# Ensure "MageB2B Staff" permissions are enabled
```

Database Tables Not Created

Symptom: Tables missing after setup:upgrade

Check:

```
php bin/magento setup:db:status
```

Expected Tables:

- customer_salesstaff
- customer_salesstaff_customer
- customer_salesstaff_group

Solution:

```
# Run setup with keep-generated flag
php bin/magento setup:upgrade --keep-generated

# If still missing, check logs
tail -f var/log/system.log
tail -f var/log/exception.log
```

Login Issues

Staff Cannot Login

Symptom: Login fails with correct credentials

Check:

1. **Staff Status**: Must be "Active"
    - Admin > Staff > All Staff
    - Edit staff, check Status field
2. **Email Correct**: Verify email address
    - Check for typos
    - Check for extra spaces
3. **Password Correct**: Case-sensitive
    - Try password reset
4. **Website and Scope Context**:
    - Check the staff website assignment and effective configuration scope
5. **Session Configuration**:

    ```
    # Check session storage
    php bin/magento config:show web/cookie/cookie_domain
    php bin/magento config:show web/cookie/cookie_path
    ```

Solution:

```
# Reset password
1. Go to staff login page
2. Click "Forgot Password"
3. Enter email
4. Check email for reset link
5. Set new password
```

Login Redirects to Wrong Page

Symptom: After login, redirected to unexpected page

Check Configuration:

- Stores > Configuration > MageB2B > Staff > General
- **Login post url handle**: Check value

Default: `staff`

Solution: Set correct redirect URL

Session Expires Too Quickly

Symptom: Staff logged out after short time

Check Configuration:

- Stores > Configuration > MageB2B > Staff > General
- **Session lifetime (seconds)**: Current value

Recommendation:

- Minimum: 3600 (1 hour)
- Recommended: 7200 (2 hours)
- Maximum: 31536000 (1 year)

Solution: Increase session lifetime

Customer Assignment Issues

Customer Not Visible to Staff

Symptom: Staff cannot see assigned customer

Check:

1. **Customer Assigned**:
    - Admin > Staff > All Staff > Edit Staff
    - Check "Customers" section
2. **Access All Customers**:
    - Edit staff
    - Check "Access All Customers" field
3. **Customer Group Restrictions**:
    - Stores > Configuration > MageB2B > Staff > General
    - Check "Restrict customer groups"
4. **Scope and Website Context**:
    - In multi-website setups, check website and scope configuration for staff visibility
5. **Customer Status**:
    - Customer account must be active

Solution:

```
Option A: Assign customer to staff
Option B: Enable "Access All Customers"
Option C: Remove customer group restrictions
Option D: Verify scope/website configuration
```

Cannot Assign Customer to Staff

Symptom: Assignment fails or customer not found

Check:

1. **Customer Exists**: Verify customer account
2. **Staff Active**: Staff status must be Active
3. **Scope and Website Context**: Verify assignment and configuration scope in multi-website setups
4. **Multiple Staff Setting**:
    - If "Can customer have multiple staff" = No
    - Customer may already be assigned

Solution:

```
1. Verify customer exists
2. Activate staff account
3. Check scope and website settings
4. Enable multiple staff per customer (if needed)
```

Customer Assigned But Not Showing

Symptom: Assignment saved but customer not in list

Check:

1. **Show Customers by Default**:
    - Configuration setting
    - May need to search first
2. **Cache Issue**:

    ```
    php bin/magento cache:flush
    ```

Solution: Clear cache and refresh page

Customer Impersonation Issues

Cannot Start Customer Context

Symptom: Customer login action not working

Check:

1. **Customer Assigned**: Verify assignment
2. **Staff Permissions**: Check "Access All Customers" or specific assignment
3. **Customer Active**: Customer account must be active
4. **Scope and Website Context**: Check scope restrictions for customer visibility/impersonation
5. **Staff Active**: Staff status must be Active

Solution:

```
1. Verify customer assignment
2. Check staff permissions
3. Activate customer account
4. Verify scope and website configuration
```

Session Lost During Impersonation

Symptom: Staff session expires while impersonating

Cause: Session lifetime too short

Solution:

- Increase session lifetime
- Stores > Configuration > MageB2B > Staff > General
- Set to 7200 (2 hours) or more

Cannot Exit Customer Context

Symptom: "Logout from current customer" action not working

Check:

1. **Browser Cookies**: Ensure cookies enabled
2. **Session Storage**: Check session configuration
3. **Cache**: Clear browser cache

Solution:

```
1. Clear browser cache and cookies
2. Close browser and reopen
3. Login as staff again
4. Try impersonation again
```

Price Editing Not Available

Symptom: Cannot edit cart item prices

Check:

1. **Staff Permission**:
    - Edit staff account

- "Can Edit Item Price" must be Yes

2. **System Configuration**:

   - Stores > Configuration > MageB2B > Staff > General
   - Check price editing settings

3. **Product Type**:

   - Some product types may not support price editing

Solution: Enable price editing in staff account and configuration

Commission Issues

Commission Not Calculated

Symptom: Order placed but commission shows $0.00

Check:

1. **Staff Commission Rate**:

   - Edit staff account
   - "Commission" field must be > 0

2. **Commission Type**:

   - Stores > Configuration > MageB2B > Staff > Commission
   - "Commission type" must be selected

3. **Order Status**:

   - Canceled orders have $0 commission

4. **Staff Assignment**:

   - Order must be assigned to staff

Solution:

```
1. Edit staff, set Commission (e.g., 5.00)
2. Configure commission type
3. Verify order is not canceled
4. Check staff assignment on order
```

Wrong Commission Amount

Symptom: Commission calculated incorrectly

Check:

1. **Commission Type**:

    - Total excluding tax
    - Total including tax
    - Product discount

2. **Staff Commission**: Verify percentage

3. **Order Totals**: Check subtotal, tax, shipping

4. **Calculation**:

    ```
    Excl. Tax: Subtotal × Commission %
    Incl. Tax: Subtotal including tax × Commission %
    Discount: Sum of discounts
    ```

Solution: Verify commission type and percentage, manually adjust if needed

Commission Not Visible to Staff

Symptom: Staff cannot see commission in dashboard

Check Configuration:

- Stores > Configuration > MageB2B > Staff > Commission
- **Show commission for Staff**: Must be Yes

Solution: Enable commission display

Commission Not Updated After Order Change

Symptom: Order edited but commission unchanged

Cause: Commission is recalculated when the order is saved; canceled orders are forced to 0.

Solution:

1. Open the order in admin and save it to trigger recalculation
2. Verify the order is not canceled
3. Verify commission configuration and staff commission value
4. Check order history/comments for recalculation events

Email Issues

Staff Not Receiving Emails

Symptom: No emails sent to staff

Check:

1. **Email Templates Enabled**:

    - Stores > Configuration > MageB2B > Staff > Email
    - "Activated Emails" setting

2. **Email Configuration**:
   - Stores > Configuration > General > Store Email Addresses
   - Verify sender addresses

3. **SMTP Settings**:
   - Check Magento email configuration
   - Test email sending

4. **Staff Email Address**:
   - Verify correct email in staff account

Solution:

```
1. Enable email templates
2. Configure SMTP settings
3. Send a real test flow (e.g., password reset or staff activation email)
4. Check spam folder
```

Customer Not Receiving Order Confirmation

Symptom: Customer doesn't get order email

Check:

1. **Email Order To** Setting:
   - Stores > Configuration > MageB2B > Staff > Email
   - "Email order to": Customer, Staff, Customer and Staff, Customer from quote and Staff, or Staff from quote and Customer

2. **Customer Email**: Verify customer email address

3. **Email Processing**:
   - Verify cron/queue consumers are running for asynchronous emails
   - Check logs for transport or template errors

Solution: Set "Email order to" to the intended recipient strategy for your order flow

Wrong Email Template Used

Symptom: Email content incorrect

Check:

- Stores > Configuration > MageB2B > Staff > Email
- Verify template selections:
  - Email template new staff
  - Email template for staff activation
  - Email template for staff de-activation
  - Forgot password template

- Password updated template

Solution: Select correct templates and save configuration

Performance Issues

Slow Customer Grid Loading

Symptom: "Customers" page loads slowly

Causes:

1. Too many customers assigned
2. Complex filters enabled
3. Show customers by default = Yes

Solutions:

Option A: Disable Default Display

- Configuration: "Show customers by default" = No
- Customers only load after search

Option B: Enable Address Filters

- "Filter default billing address only" = Yes
- "Filter default shipping address only" = Yes
- Improves query performance

Option C: Reduce Filters

- Configuration: "Search filters for customer grid"
- Disable unused filters

Option D: Enable Pagination

- "Enable limiter on Customer Grid" = Yes
- Staff can choose records per page

Slow Order Placement

Symptom: Checkout takes long time

Causes:

1. Commission calculation complex
2. Email sending delays
3. Database queries slow

Solutions:

```
1. Optimize database indexes
2. Use queue for emails
3. Enable caching
4. Check server resources
```

Database Issues

Duplicate Entry Error

Symptom: Error when assigning customer

Typical Error Pattern:

- Integrity/duplicate assignment error while linking customer and staff

Cause: Customer already assigned to staff

Solution:

```
Option A: Enable "Can customer have multiple staff"
Option B: Remove existing assignment first
Option C: Check for duplicate assignments
```

Foreign Key Constraint Error

Symptom: Cannot delete staff or customer

Typical Error Pattern:

- Delete/update blocked because related records still exist

Cause: Related records exist

Solution:

```
1. Remove customer assignments first
2. Then delete staff account
3. If error 1451 persists, check for custom/external constraints or
integrations blocking deletion
4. Core customer-staff assignment relations use cascade behavior
```

Frontend Display Issues

Staff Links Not Showing in Footer

Symptom: Login/signup links missing

Check Configuration:

- Stores > Configuration > MageB2B > Staff > General
- **Add footer link for staff signup**: Yes
- **Add footer link for staff login**: Yes

Solution: Enable footer links and clear cache

Staff Account Menu Not Visible in Header (Custom Themes)

Symptom: Staff account details and logout are missing from the header, but appear on the staff dashboard.

Cause: The Staff header menu is rendered into the standard Magento container `header.panel`. Many custom themes remove or replace `header.panel`, so the Staff header block has no place to render.

Fix:

1. Restore `header.panel` in the theme, or
2. Attach the Staff header block to the actual header container used by the theme.

If your theme does not use `header.panel`, map the staff account header output to the container that renders your header links (for example `header.container`, `header-wrapper`, or a custom container from your theme layout).

Staff Dashboard Empty

Symptom: No data in staff dashboard

Causes:

1. No customers assigned
2. No orders placed
3. Commission display disabled

Solution:

```
1. Assign customers to staff
2. Place test order
3. Enable commission display
4. Clear cache
```

Getting Help

Enable Debug Mode

Configuration:

```
# Enable developer mode
php bin/magento deploy:mode:set developer

# Enable logging
php bin/magento config:set dev/debug/template_hints_storefront 1
```

Check Logs

Log Files:

```
# System log
tail -f var/log/system.log
```

```
# Exception log
tail -f var/log/exception.log

# Debug log
tail -f var/log/debug.log

# Apache/Nginx error log
tail -f /var/log/apache2/error.log
tail -f /var/log/nginx/error.log
```

Collect Information

When reporting issues, include:

- Magento version
- Staff extension version
- PHP version
- Error messages from logs
- Steps to reproduce
- Expected vs actual behavior
- Screenshots (if applicable)

Preventive Measures

Regular Maintenance

Weekly:

- Review staff accounts
- Check commission calculations
- Monitor email delivery
- Review customer assignments

Monthly:

- Update extension
- Review configuration
- Optimize database
- Check performance

Quarterly:

- Audit staff permissions
- Review commission structure
- Update documentation
- Train new staff

Best Practices

Security:

- Strong passwords
- Regular password changes

- Deactivate departed staff immediately
- Monitor login attempts

Performance:

- Optimize customer assignments
- Use appropriate filters
- Enable caching
- Monitor server resources

Data Quality:

- Verify customer assignments
- Check commission accuracy
- Validate email addresses
- Clean up old data

Next Steps

For more detailed information, see:

Configuration Guide → Customer Assignment → Commission System →

Email Configuration

Sales Staff Extension · /staff/troubleshooting/email-configuration

This page helps troubleshoot staff-related emails (staff account emails, staff order emails, and add-on emails like visits/quotes/history).

Where to Configure

Go to **Stores > Configuration > MageB2B > Staff > Email settings**

Key settings:

- **Activated Emails** (`staff/email/enabled_templates`) – allowlist for helper-driven staff/add-on template emails. If a template id is not enabled here, that helper-driven email is skipped.
- **Email order to** (`staff/email/email_order_to`) – who receives order emails in staff context (separate from `Activated Emails` routing behavior).
- **Sent email copy to staff when customer is placing an order** (`staff/email/customer_order_email_copy`)
    - Depends on `staff/general/set_staff_id_permanently_on_order = Yes`
- **CC Receiver for staff emails** (`staff/email/send_cc`)
- **BCC Receiver for staff emails** (`staff/email/send_bcc`)
- **Send order email from fixed Store View** (`staff/email/send_order_email_from_fixed_storeview`)
- **Staff name and email details** (`staff/email/name_email_details`) – use variable `{{var order_staff_name_email_detail}}` in sales order email templates.

> Screenshot placeholder: Staff email settings (Activated Emails + CC/BCC)

Common Root Cause: Helper-Driven Template Not Activated

Many add-ons contribute helper-driven template ids, and these are controlled by **Activated Emails**.

Example: if `staff_visit_customer_cancelled` is not in `staff/email/enabled_templates`, the visit cancellation email will not be sent.

Common Template IDs

Base Staff module defaults:

- `staff_email_staff_new_template`
- `staff_email_staff_set_password_customer_template`
- `staff_email_staff_activated`
- `staff_email_staff_de_activated`
- `staff_email_forgot_password`
- `staff_email_password_updated`

Add-on examples (only available when the add-on is installed):

- Customer History: `staff_email_history_email_alert`
- Order Management: `staff_email_staff_edited_order_template`
- Customer Visits:
  - `staff_visit_created`, `staff_visit_updated`, `staff_visit_cancelled`
  - `staff_visit_customer_cancelled`, `staff_visit_reminder`, `staff_visit_inform`, `staff_visit_approve`
- Quotes:
  - `staff_email_quote_template`, `staff_email_quote_to_customer_template`
  - `staff_email_quote_status_update_template`, `staff_email_quote_expiry_reminder_template`
  - `staff_email_quote_internal_notification_template`, `staff_email_customer_quote_request_template`

Debug Checklist

1. For helper-driven emails, confirm the relevant template id is enabled in **Activated Emails**.
2. Check scope: make sure you saved configuration at the intended scope (Default / Website / Store View).
3. Clear config cache after changes:

```
php bin/magento cache:flush
```

4. Check Magento logs:
   - `var/log/system.log`
   - `var/log/exception.log`
5. If you use asynchronous email sending / queues, verify your queue consumers are running.

Related

- Common Issues
- Configuration

Customer Service Use Case

Sales Staff Extension · /staff/use-cases/customer-service

How customer service teams can use the Staff extension to help customers place orders, fix cart issues, and answer account-related questions without giving out customer passwords.

Scenario

- Team: Customer service agents
- Goal: Resolve issues quickly while keeping a clean audit trail (who did what, for which customer)

Typical Workflow

1. Identify The Customer

Use **Customers** (assigned customers) or **Search** (depending on your configuration):

- search by name / email
- search by external customer id (optional configuration)

2. Login As Customer (Impersonation)

1. Open the customer record
2. Use the customer login action (tooltip: **Login to this account**)
3. A customer-context banner may be shown (theme-dependent)
4. After finishing, click **Logout from current customer**

Use cases:

- reproduce checkout problems
- apply a one-time discount by editing cart item price (if enabled)
- place an order for a customer on the phone

3. Document What Happened

Recommended:

- add a short customer comment/note (if enabled)
- reference the order number if you placed an order

Recommended Configuration

- **Access All Customers** for support agents (or assign only support customers)
- **Not allowed handles**: block sensitive pages that support should not access (example: password change)
- **Session lifetime**: increase to avoid logouts during longer calls

Common Pitfalls

- If staff cannot see customers: check customer group restrictions and website assignment.
- If impersonation fails: check assignment/access rights, account status, and active scope

configuration.

Field Sales

Sales Staff Extension · /staff/use-cases/field-sales

How field sales representatives use the Staff extension to manage their territory and customers on the go.

Scenario

Company: Industrial Equipment Distributor
Sales Team: 15 field sales representatives
Territory: Regional coverage (North, South, East, West)
Customers: 500+ B2B customers
Average Order: $5,000

Challenge

Field sales reps need to:

- Access customer information on-site
- Place orders during customer visits
- Apply custom pricing and discounts
- Create new customer accounts
- Track commission earnings
- Manage their territory efficiently

Solution

Staff Setup

Staff Groups:

- Territory North (4 reps)
- Territory South (4 reps)
- Territory East (4 reps)
- Territory West (3 reps)

Staff Configuration:

- Can Edit Item Price: Yes
- Can Create Customer: Yes
- Commission: 7.5%
- Access All Customers: No (territory-specific)

Mobile Access

Equipment:

- Tablet or smartphone
- Mobile data connection
- Magento responsive frontend

Staff Login: `https://yourstore.com/staff/account/login`

Typical Workflow

Morning: Plan Route

1. Login to staff dashboard
2. View customer list for territory
3. Filter by city/region
4. Plan visit sequence
5. Check customer notes

On-Site Visit

Step 1: Customer Meeting

- Discuss needs
- Review products
- Negotiate pricing

Step 2: Start Customer Context

- Staff dashboard > Customers
- Find customer
- Use the customer login action (tooltip: "Login to this account")

Step 3: Build Order

- Browse catalog
- Add products to cart
- Edit prices (apply negotiated discount)
- Review cart

Step 4: Complete Order

- Proceed to checkout
- Verify shipping address
- Select payment method
- Place order

Step 5: Confirmation

- Order confirmation displayed
- Commission calculated automatically
- Customer receives email
- Click "Logout from current customer" to return to staff context

New Customer Acquisition

Step 1: Collect Information

- Business card
- Company details
- Contact information

- VAT number

Step 2: Create Account

- Staff dashboard > Create Customer
- Enter customer details
- Select customer group (Wholesale)
- Add billing address
- Send email invitation

Step 3: First Order

- Login as new customer
- Place introductory order
- Apply welcome discount
- Complete checkout

End of Day

1. Review orders placed
2. Check commission earned
3. Add customer notes
4. Schedule follow-ups
5. Plan next day's route

Benefits

For Sales Reps

Efficiency:

- No need to call office
- Instant order placement
- Real-time inventory check
- Immediate confirmation

Flexibility:

- Custom pricing on-site
- Quick customer creation
- Mobile access anywhere
- Mobile web access (online)

Earnings:

- Real-time commission tracking
- Transparent calculations
- Performance visibility
- Goal tracking

For Management

Visibility:

- Real-time sales data
- Territory performance
- Rep productivity
- Customer coverage

Control:

- Price editing limits
- Approval workflows
- Commission management
- Territory assignments

Analytics:

- Sales by territory
- Rep performance
- Customer acquisition
- Average order value

For Customers

Service:

- Personalized attention
- On-site support
- Quick order processing
- Dedicated rep

Convenience:

- No phone orders needed
- Immediate confirmation
- Custom pricing
- Flexible terms

Key Features Used

1. **Customer Impersonation**: Place orders on behalf of customers
2. **Price Editing**: Apply negotiated discounts
3. **Customer Creation**: Onboard new customers on-site
4. **Commission Tracking**: Monitor earnings in real-time
5. **Mobile Access**: Work from anywhere
6. **Territory Management**: Staff groups by region

Best Practices

Preparation

Before Visit:

- Review customer history
- Check previous orders
- Note special requirements
- Prepare product samples

- Charge mobile device

During Visit

Professional:

- Dress appropriately
- Arrive on time
- Listen to customer needs
- Demonstrate products
- Provide solutions

Technical:

- Test internet connection
- Have backup (mobile hotspot)
- Know product catalog
- Understand pricing rules
- Practice order process

Follow-Up

After Visit:

- Add customer notes
- Schedule next visit
- Send thank you email
- Track order delivery
- Request feedback

Tools & Add-Ons

Recommended:

- **Staff API**: Mobile app integration
- **Customer History**: Track all interactions
- **Customer Visit**: Visit planning and customer visit workflows
- **Core Reports**: Territory performance analytics

Next Steps

- Inside Sales Operations →
- Territory Management →
- Customer History →

Inside Sales

Sales Staff Extension · /staff/use-cases/inside-sales

How inside sales teams use the Staff extension to efficiently process phone and email orders.

Scenario

Company: Office Supplies Wholesaler
Sales Team: 8 inside sales representatives
Location: Centralized call center
Customers: 1,200+ B2B customers
Daily Orders: 50-80 orders
Average Order: $800

Challenge

Inside sales reps need to:

- Handle high volume of phone orders
- Process orders quickly and accurately
- Access any customer account
- Apply discounts and special pricing
- Track commission per order
- Meet daily sales targets

Solution

Staff Setup

Staff Group: Inside Sales

Staff Configuration:

- Access All Customers: Yes
- Can Edit Item Price: Yes
- Can Create Customer: Yes
- Commission: 4%
- Session Lifetime: 7200 seconds (2 hours)

Workstation Setup

Equipment:

- Dual monitors
- Headset
- High-speed internet
- CRM integration

Browser Bookmarks:

- Staff login

- Customer search
- Product catalog
- Order history

Typical Workflow

Incoming Call

Step 1: Answer Call

```
"Thank you for calling [Company], this is [Name], how may I help you?"
```

Step 2: Identify Customer

- Ask for company name or customer ID
- Search in staff dashboard
- Verify customer details

Step 3: Start Customer Context

- Use the customer login action (tooltip: "Login to this account")
- Access customer account
- View order history

Order Processing

Step 4: Take Order

- Customer reads product codes
- Search and add products to cart
- Verify quantities
- Check inventory availability

Step 5: Apply Pricing

- Check customer's pricing tier
- Apply volume discounts
- Edit prices if needed
- Apply coupon codes

Step 6: Review Order

- Read back order summary
- Confirm shipping address
- Verify payment method
- Calculate total

Step 7: Complete Order

- Proceed to checkout
- Place order
- Note order number
- Confirm commission

Step 8: Confirmation

```
"Your order #[NUMBER] has been placed.
Total: $[AMOUNT]
Expected delivery: [DATE]
You'll receive a confirmation email shortly."
```

Step 9: Exit Customer Context

- Click "Logout from current customer"
- Ready for next call

Email Orders

Process:

1. Read customer email
2. Search customer
3. Login as customer
4. Add products from email
5. Apply pricing
6. Place order
7. Reply with confirmation

Metrics (What You Can Measure)

Typical metrics you can track from staff-linked orders and commission data:

- orders placed per staff member
- sales volume per staff member / team
- commission totals (if enabled)
- average order value

Benefits

For Sales Reps

Efficiency:

- Quick customer access
- Fast order entry
- Real-time inventory
- Instant confirmation
- No paperwork

Productivity:

- More orders per day
- Shorter call times
- Fewer errors
- Better accuracy
- Higher satisfaction

Earnings:

- Clear commission tracking
- Daily earnings visible
- Performance comparison
- Goal achievement

For Management

Monitoring:

- Real-time dashboard
- Individual performance
- Team performance
- Orders placed
- Sales value and average order value

Quality Control:

- Order accuracy
- Pricing compliance
- Customer satisfaction
- Response times
- Error rates

Reporting:

- Daily sales reports
- Commission reports
- Performance rankings
- Trend analysis
- Forecasting

For Customers

Speed:

- Fast order processing
- Immediate confirmation
- Quick turnaround
- Efficient service

Accuracy:

- Correct orders
- Accurate pricing
- Proper shipping
- Clear communication

Key Features Used

1. **Access All Customers**: Handle any customer call
2. **Customer Impersonation**: Quick order placement
3. **Price Editing**: Apply discounts and special pricing

4. **Commission Tracking**: Monitor daily earnings
5. **Order History**: View previous orders
6. **Quick Search**: Find customers fast

Tools & Technology

CRM Integration

Connected Systems:

- Customer database
- Call history
- Email integration
- Notes and comments

Benefits:

- Complete customer view
- Interaction history
- Follow-up reminders
- Performance tracking

Phone System

Features:

- Caller ID integration
- Automatic customer lookup
- Call recording
- Queue management

Knowledge Base

Quick Access:

- Product information
- Pricing rules
- Shipping policies
- Return procedures
- FAQ

Training Program

New Hire Training

Week 1: System Training

- Staff login and navigation
- Customer search
- Product catalog
- Order placement
- Price editing

Week 2: Process Training

- Call handling
- Order processing
- Problem resolution
- Quality standards
- Performance metrics

Week 3: Shadowing

- Listen to experienced reps
- Practice orders
- Receive feedback
- Build confidence

Week 4: Live Calls

- Handle real calls
- Supervisor monitoring
- Performance review
- Ongoing coaching

Ongoing Training

Monthly:

- New product training
- System updates
- Best practices
- Performance review

Quarterly:

- Advanced techniques
- Sales skills
- Customer service
- Goal setting

Best Practices

Call Handling

Professional:

- Friendly greeting
- Active listening
- Clear communication
- Accurate information
- Courteous closing

Efficient:

- Quick customer lookup
- Fast product search

- Accurate data entry
- Smooth checkout
- Brief confirmation

Order Accuracy

Verify:

- Product codes
- Quantities
- Prices
- Shipping address
- Payment method

Double-Check:

- Order total
- Delivery date
- Special instructions
- Customer confirmation

Time Management

Prioritize:

- Answer calls promptly
- Process orders efficiently
- Minimize hold time
- Handle emails between calls
- Take scheduled breaks

Next Steps

- Field Sales Teams →
- Customer Service →
- Reports →

Territory Management

Sales Staff Extension · /staff/use-cases/territory-management

How companies use staff groups to organize sales teams by geographic territories.

Scenario

Company: National Distributor
Coverage: 4 regions (North, South, East, West)
Sales Team: 20 representatives
Customers: 2,000+ across all regions

Territory Structure

Staff Groups

```
├── Territory North (5 reps)
│   ├── States: NY, NJ, PA, CT, MA
│   └── Customers: 500
├── Territory South (6 reps)
│   ├── States: FL, GA, AL, SC, NC
│   └── Customers: 600
├── Territory East (4 reps)
│   ├── States: VA, MD, DE, WV
│   └── Customers: 400
└── Territory West (5 reps)
    ├── States: CA, NV, AZ, OR, WA
    └── Customers: 500
```

Commission Structure

Territory-Based Rates:

- Territory North: 6% (high cost of living)
- Territory South: 7% (growth incentive)
- Territory East: 5.5% (established market)
- Territory West: 7.5% (expansion focus)

Implementation

Step 1: Create Staff Groups

1. Staff > Staff Groups
2. Create groups:
    - Territory North
    - Territory South
    - Territory East
    - Territory West

Step 2: Assign Staff

1. Edit each staff member
2. Select appropriate territory group
3. Set commission rate
4. Save

Step 3: Assign Customers

By ZIP Code:

1. Customers > All Customers
2. Filter by ZIP code range
3. Select customers
4. Mass assign to territory staff

By State:

1. Filter by state
2. Select customers
3. Assign to territory

Benefits

Clear Ownership

Each Territory Has:

- Dedicated sales team
- Defined customer base
- Specific geographic area
- Clear responsibilities

No Overlap:

- Customers assigned to one territory
- No confusion
- Clear accountability
- Efficient coverage

Performance Tracking

By Territory:

- Total sales
- Orders placed
- Commission earned
- Customer acquisition
- Growth rate

Comparison:

- Territory vs territory
- Period vs period

- Actual vs target
- Market share

Resource Allocation

Based on Performance:

- Add reps to growing territories
- Redistribute underperforming areas
- Adjust commission rates
- Reallocate budgets

Reporting

Territory Reporting in Practice

Use staff-linked order and commission data to track territory performance.

Typical Metrics:

- Sales volume
- Number of orders
- Average order value
- Commission total
- Customer count
- Growth rate

How Teams Usually Build It:

- Staff groups define territory ownership
- Customer assignment maps customers to territory reps
- Core Magento reports are filtered/exported for territory analysis
- Optional BI tools are used for map views and advanced dashboards

Best Practices

Territory Design

Balanced:

- Similar customer counts
- Comparable sales potential
- Manageable geography
- Fair workload

Logical:

- Natural boundaries (states, regions)
- Travel efficiency
- Market characteristics
- Customer density

Territory Maintenance

Regular Review:

- Quarterly territory analysis
- Customer redistribution
- Boundary adjustments
- Performance evaluation

Flexibility:

- Adjust for growth
- Respond to changes
- Optimize coverage
- Balance workload

Next Steps

- Field Sales Teams →
- Staff Groups →
- Reports →