Sales Staff Extension

Complete PDF Manual

Guide for Magento administrators, technical project owners, and implementation teams.

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EXTENSION
Magento 2 Extension Sales Staff

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Sales Staff Extension

SoftwareSilo Sales Staff gives sales representatives their own Magento storefront workspace. A staff user can work with assigned customers, place or edit eligible orders in customer context, and review sales and commission data without receiving Magento Admin access.

The base extension includes staff accounts, groups, customer assignments, customer impersonation, customer creation, order management, commissions and reports. Customer history, visit planning, quotes, TFA, SAML and bulk import/export are separate packages.

Start here

- Install Sales Staff
- Configure the extension
- Create the first staff account

How the account model works

Staff accounts are separate from Magento Admin users and customer accounts. They sign in through the storefront, but their access is limited by the Staff record and its assigned customers.

A representative can be given access to every customer or only to selected customers. If **Can customer have multiple staff** is enabled, the same customer may be assigned to more than one representative. Removing an assignment does not delete the Magento customer.

Staff groups organize representatives for administration and reporting. They do not replace each staff account's operational permissions, such as customer creation, item-price editing or order editing.

Base features

- Customer assignment: control which customers each representative can access.
- Customer impersonation: enter an assigned customer's storefront session to assist with shopping and ordering.
- Customer creation: let authorized representatives register new Magento customers.
- Order management: place orders in customer context and edit orders in configured states.
- Commissions: store the responsible representative, group and calculated commission on orders.
- Reports: built-in order and product reporting for staff activity. Reports are not a separate add-on.

- Staff groups: organize representatives and set the default group for new accounts.

Optional packages

- REST and SOAP API
- Customer history
- Customer visits and calendar integration
- Import and export
- Quote management
- Hyvä compatibility
- Two-factor authentication
- SAML single sign-on
- GraphQL API: headless staff queries, staff tokens and customer impersonation tokens (requires the Staff extension).

Sample-data packages are intended for development and demonstrations, not production:

- Staff sample data
- Staff Quote sample data

Choose the relevant workflow

- Field sales teams
- Inside sales
- Territory management
- Customer service

For a missing menu, blocked customer or order-edit problem, start with Common Issues. Email delivery has a separate Email Configuration guide.

Installation and Setup

Install the base Sales Staff package first. Add only the optional packages your workflow needs, and pin versions according to your SoftwareSilo repository access and release policy.

Requirements

The Staff package requires:

- PHP 8.1 or newer within its supported PHP constraint
- Magento 2.4
- PHP `intl` and `iconv` extensions
- Composer access to the SoftwareSilo repository

Take a normal application and database backup before changing modules on an existing store. Test the installation in staging first.

Install the base extension

Use the repository host, repository key and token supplied with your license:

Replace `repo.softwaresilo.io`, `softwaresilo`, `https://repo.softwaresilo.io/` and `<token>` with the repository details shown under **Account > Licenses** in your SoftwareSilo account — see Installation & Updates.

```
composer config bearer.repo.softwaresilo.io <token>
composer config repositories.softwaresilo composer
https://repo.softwaresilo.io/
composer require mageb2b/staff:*
php bin/magento module:enable MageB2B_ExtensionManager
MageB2B_Staff
php bin/magento setup:upgrade
php bin/magento setup:di:compile
php bin/magento setup:static-content:deploy
php bin/magento cache:flush
```

Adjust the static-content deployment command for the locales and deployment strategy used by your store.

The setup creates Staff account, group and customer-assignment tables. It also adds Staff ownership and commission fields to quotes, sales orders and the sales-order grid.

Verify the installation

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

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

Then sign in to Magento Admin and check:

1. **Staff > All Staff** opens without an error.
2. **Staff > Staff Groups** is available to the admin role.
3. **Stores > Configuration > MageB2B > Staff** shows the extension information and configuration groups.

If the menu is missing for one administrator, check that administrator's role resources before reinstalling anything.

First configuration

1. Create a staff group under **Staff > Staff Groups**.
2. Select it as **Default Staff Group** under **Stores > Configuration > MageB2B > Staff > General settings**.
3. Review the 900-second default session lifetime and the login/signup footer links.
4. Review customer-listing, customer-creation and order-edit permissions before activating an account.
5. Configure and test the Staff emails used by your workflow.
6. Create the first representative using Create Your First Staff Account.

Reports and order management are part of the base extension. Do not look for or install separate `staff-report` or `staff-ordermanagement` packages.

Optional packages

Each optional package uses the same installation pattern:

```
composer require mageb2b/<package>:*
php bin/magento module:enable <Magento_Module_Name>
php bin/magento setup:upgrade
php bin/magento setup:di:compile
php bin/magento cache:flush
```

Workflow	Composer package	Magento module
REST and SOAP integration	`mageb2b/staff-api`	`MageB2B_StaffApi`
Customer timeline and files	`mageb2b/staff-customerhistory`	`MageB2B_StaffCustomerHistory`
Visit scheduling and calendars	`mageb2b/staff-customervisit`	`MageB2B_StaffCustomerVisit`

Workflow	Composer package	Magento module
Staff CSV import/export	`mageb2b/staff-importexport`	`MageB2B_StaffImportExport`
Staff quotation workflow	`mageb2b/staff-quote`	`MageB2B_StaffQuote`
Hyvä templates	`mageb2b/staff-hyva`	`MageB2B_StaffHyva`
Authenticator-based Staff login	`mageb2b/staff-tfa`	`MageB2B_StaffTFA`
SAML sign-in	`mageb2b/staff-saml`	`MageB2B_StaffSaml`

Install `mageb2b/staff-sample-data` and `mageb2b/staff-quote-sample-data` only in development or disposable demo environments.

Staff TFA and Staff SAML are alternative login packages and cannot be installed together. The TFA package declares a Composer conflict with SAML. Choose the authentication method before adding either package.

The GraphQL package requires the Staff base extension. See the GraphQL add-on article for the exposed queries and mutations.

Updating or removing Staff

Before updating, record installed versions and review their changelogs:

```
composer show mageb2b/staff mageb2b/staff-\*
```

Use Composer to update an explicitly selected package, then run Magento's setup, compilation and cache commands. Re-test sign-in, customer access, order creation, emails and every installed add-on in staging.

Removing the package is a data-impacting operation because module uninstall routines may remove module-owned tables or attributes. Export anything you need to retain and confirm the exact Composer and Magento uninstall plan with SoftwareSilo support before running it on a live store.

If setup fails

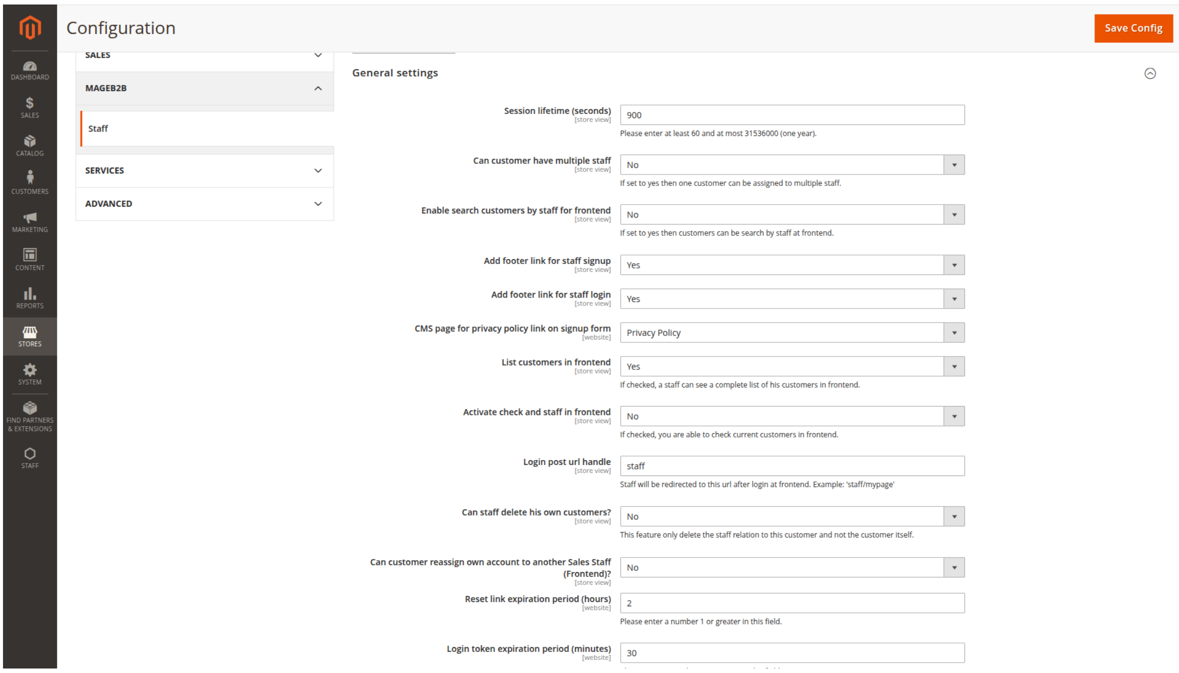
- A Composer authentication error usually means the repository host or token is wrong.
- A dependency-resolution error means the selected package versions cannot coexist; do not use `--with-all-dependencies` blindly.
- A missing Admin menu is often an ACL or cache issue.
- A storefront 404 after installation can require static-content deployment and cache cleaning.

Continue with Configuration once the Admin pages are accessible.

Configuration

Sales Staff is configured under **Stores > Configuration > MageB2B > Staff**. Most settings support website or store-view scope. Set the scope selector before saving when a Magento installation serves more than one sales organization.

Configure access around a real workflow first: who may see which customers, which actions they may perform, how orders are attributed, and which emails should leave the store.



General settings

Session and sign-in

- **Session lifetime:** 900 seconds by default; accepted range is 60 seconds to one year.
- **Login post URL handle:** `staff` by default. Use an internal route handle such as `staff/customers`, never an external URL.
- **Reset link expiration:** two hours by default.
- **Login token expiration:** 30 minutes by default.
- **Minimum password length:** eight characters by default.
- **Required character classes:** three of lowercase, uppercase, digits and special characters by default.
- **Not allowed handles:** blocks Staff context from selected storefront handles. The shipped list includes `customer_account_login`.

Use the shortest session that remains practical for representatives on shared or mobile devices. Do not lengthen sessions to compensate for a broken sign-in flow.

Staff signup and login links

The footer signup and login links are enabled by default. The signup form also links to the selected privacy-policy CMS page.

Public Staff signup creates an account that still follows the extension's activation flow. If representatives are provisioned only by administrators or SAML, hide the signup link. Hiding the footer link is not a substitute for controlling who can activate and use an account.

Customer assignment and listing

- **Can customer have multiple staff:** enables multiple assignments for one customer.
- **List customers in frontend:** enabled by default.
- **Show all assigned customers by default:** enabled by default; disable it when large portfolios should appear only after a search.
- **Enable search customers by staff:** adds Staff-related search criteria to the customer grid.
- **Activate check and staff in frontend:** exposes the email-based customer lookup/addition block.
- **Can staff delete his own customers:** disabled by default. This removes only the Staff-customer relation, not the Magento customer.
- **Can customer reassign own account:** disabled by default.
- **Restrict customer groups:** limits which Magento customer groups representatives may work with.
- **Default Staff Group:** applied when a new Staff account has no explicit group.

Choose single or multiple assignment before importing a large customer portfolio. Changing the policy later can change how primary ownership and order attribution are interpreted.

Customer grid and dashboard

The customer grid can show assignment comments, an external customer ID attribute and configurable search filters. The shipped filter set includes billing address, shipping address and assignment comment. Address filters can be restricted to default billing or shipping addresses, and the page-size selector is enabled by default.

Display staff in customer dashboard is disabled by default. When enabled, **Display primary staff account only** limits the customer-facing block to the primary representative. Upload a neutral, approved profile image as the default for representatives without their own image.

Price and order attribution controls

- **Allow 0 Price on Item Price Edit:** disabled by default. Enable only for a documented free-item or replacement process.
- **Set staff permanently on order:** disabled by default. When enabled, the customer's

primary Staff account can be written to an order even when the representative did not place it.

The permanent attribution setting changes the meaning of Staff reports and commission ownership. Agree on that rule with sales operations before enabling it.

Commission settings

The representative's percentage is stored on the Staff account. Choose one calculation basis:

- net total excluding tax
- net total including tax
- product-level discount

Show commission for Staff is disabled by default. Enable it when representatives should see their percentage and order commission values in the storefront Staff area.

See Commission System for calculation and audit considerations.

Reports

Show sales report for staff in frontend is enabled by default. It controls the order and product report links in the Staff account. Admin report access is controlled separately by ACL permissions.

Reports are part of the base extension. No Reports add-on is required.

Magento Admin order grid

Both options are disabled by default:

- **Add Sales Staff to Order Grid** adds Staff information to the sales-order grid.
- **Add Reassign feature for Sales Staff to Order Grid** adds a mass action for changing order attribution.

Grant reassignment only to roles that are allowed to change ownership and commission reporting.

Customer registration by Staff

Frontend customer creation is enabled by default. The customer-group, address and VAT fields are also shown by default, and Staff may set the customer's password by default.

Review these settings together with each representative's **Can Create Customer** permission and the restricted customer-group list. For a safer onboarding flow, let the customer set their password through the account email instead of sharing a password chosen by Staff.

Staff order management

Only orders in the **New** state are editable by default. The configuration can also allow Pending Payment, Processing, Complete, Closed, Canceled, Holded or Payment Review, but selecting a state does not guarantee that every Magento or payment operation is safe to repeat.

The following bypasses are disabled by default:

- disregard minimum order amount
- disregard minimum and maximum sale quantity rules
- allow backorders for Staff orders

Expand the allowed states and bypasses only after testing stock, payment, tax, invoice and shipment behavior for the store's actual extensions.

Email settings

Activated Emails is a global allowlist for Staff templates. The base selection includes new account, customer password setup, activation, deactivation, forgotten password and password-updated messages. Optional Staff packages add their own templates to the list.

Order-email routing can send to nobody, the customer and Staff as recipients, the customer only, the customer with Staff as BCC, or Staff only. The default is customer only.

Other controls include:

- templates for Staff onboarding and password events
- CC and BCC recipients for Staff emails
- a copy to the assigned representative when the customer orders directly; this depends on permanent Staff attribution
- a fixed store view for order email
- the representative name/email line inserted into selected order templates

Send plain password in staff account emails is disabled by default. Leave it disabled. Password setup and reset links are safer and easier to revoke.

After changing email settings, test one activation, one password reset, one Staff-created customer and one Staff-attributed order in a non-production mailbox.

Pricesystem integration

Display additional pricesystem prices is disabled by default. When the compatible SoftwareSilo Pricesystem core package is installed, it can show available Pricesystem prices as a selector during Staff cart-price editing.

If Pricesystem is absent, leave this option disabled. It is not a standalone Staff pricing engine.

Configuration checklist

Before activating representatives:

1. Confirm store scope, session and password policy.
2. Decide whether customer assignment is single or multiple.
3. Create the Staff groups and select the default.
4. Review customer-list, lookup, creation and reassignment controls.
5. Review each Staff account's operational permissions.
6. Decide how orders are attributed and commissions calculated.
7. Keep order-edit bypasses off unless a tested process requires them.
8. Verify the activated email templates and recipients.
9. Test an assigned customer from Staff sign-in through order and report.

Continue with Create Your First Staff Account.

Create Your First Staff Account

Start with one representative and one fictional customer in staging. This exposes assignment, email and order-attribution mistakes before a full sales team is imported.

1. Create a Staff group

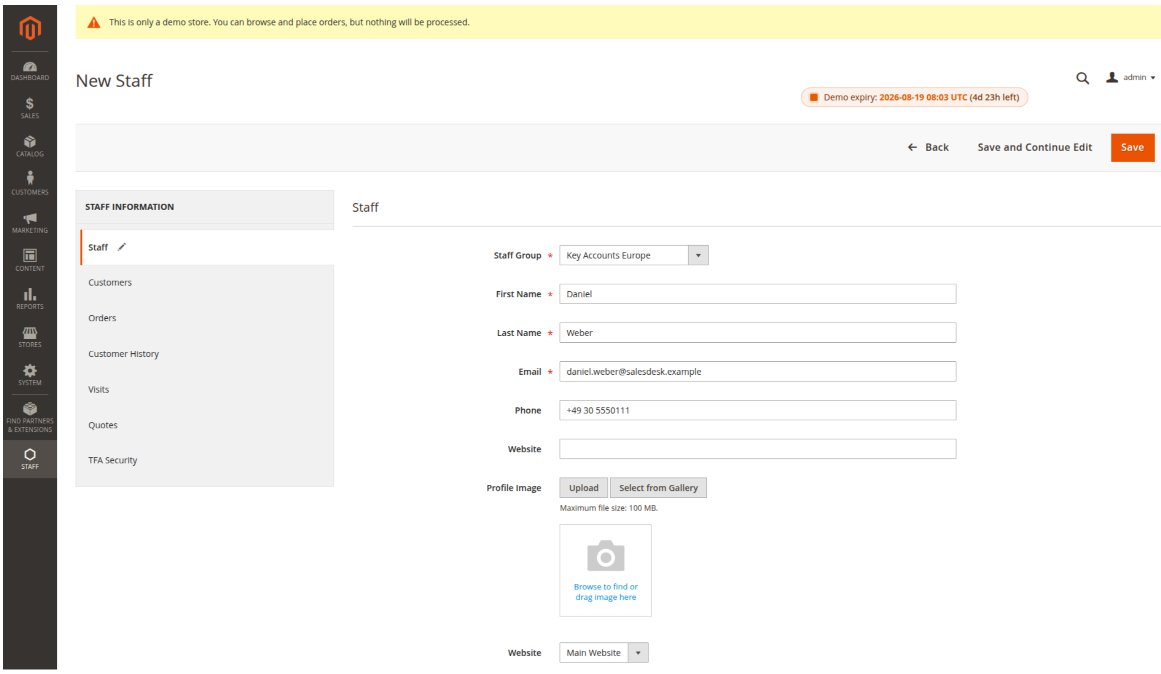
Open **Staff > Staff Groups**, choose **Add New Group**, enter a name such as `Field Sales` and save it.

Groups organize Staff accounts and are stored with Staff-attributed orders. They do not grant a bundle of operational permissions by themselves; those are selected on the Staff account.

2. Add the representative

Open **Staff > All Staff** and choose **Add New Staff**. Use a fictional staging identity such as:

- Daniel Weber
- `daniel.weber@salesdesk.example`
- the website where his customers belong
- the Key Accounts Europe group



Set a unique password that meets the configured Staff password policy. Do not reuse Magento Admin or customer credentials.

Review each permission explicitly:

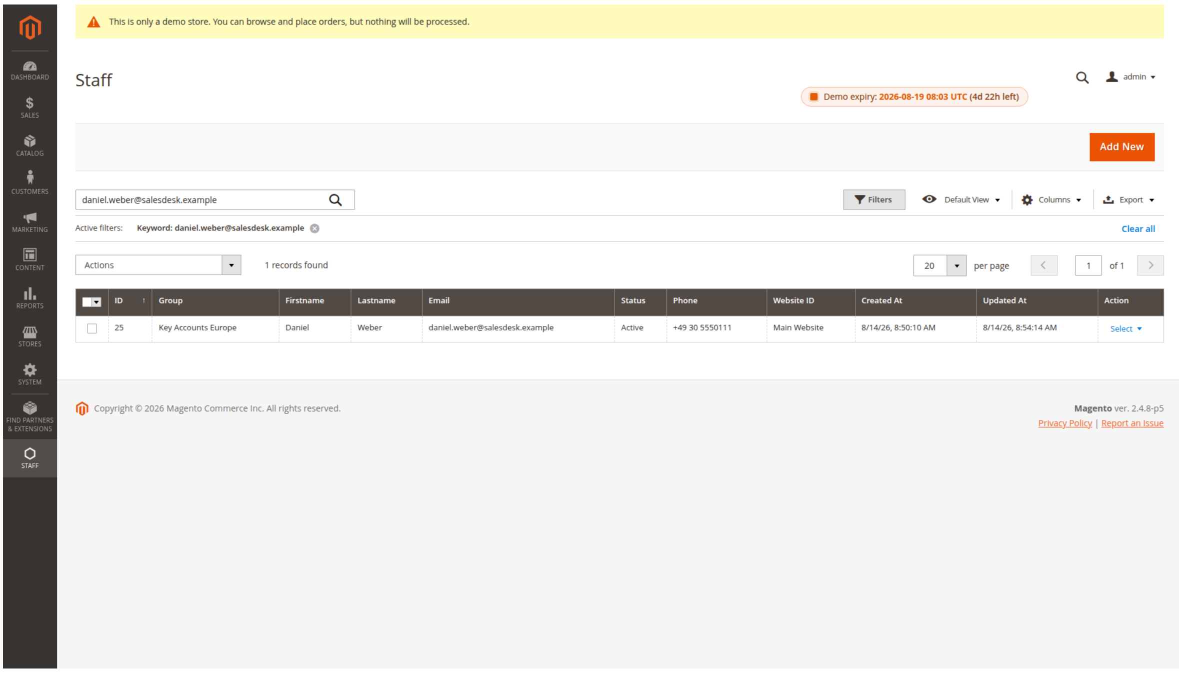
Field	Meaning
Status	Only active Staff accounts can sign in
Access All Customers	Opens every customer in the Staff website; leave off for portfolio-based access
Can Edit Item Price	Lets the representative change cart item prices within the configured rules
Can Create Customer	Works together with the global customer-creation setting
Can Edit Orders	Works together with the globally allowed order states
Commission	Percentage used by the configured commission calculation

Installed add-ons may add more fields, such as quote or customer-history permissions. Leave a permission off until the representative's job requires it.

The edit form also offers a **Login as Staff** button that opens the representative's storefront workspace in a new tab. It is controlled by the Admin ACL resource **Staff > Login as Staff** — restrict it like customer impersonation, because it bypasses the staff password.

Save the account. A new-account email is sent only when the relevant template is active and the creation path triggers that notification. Check the mailbox instead of assuming it was delivered.

Use the filtered Staff grid to confirm the group, website, status and contact details before assigning customers.



3. Assign a customer

Edit the Staff account and use its customer grid to select an existing customer, or use the supported Staff assignment action on the Magento customer. Save, reopen the Staff record and confirm the customer remains assigned.

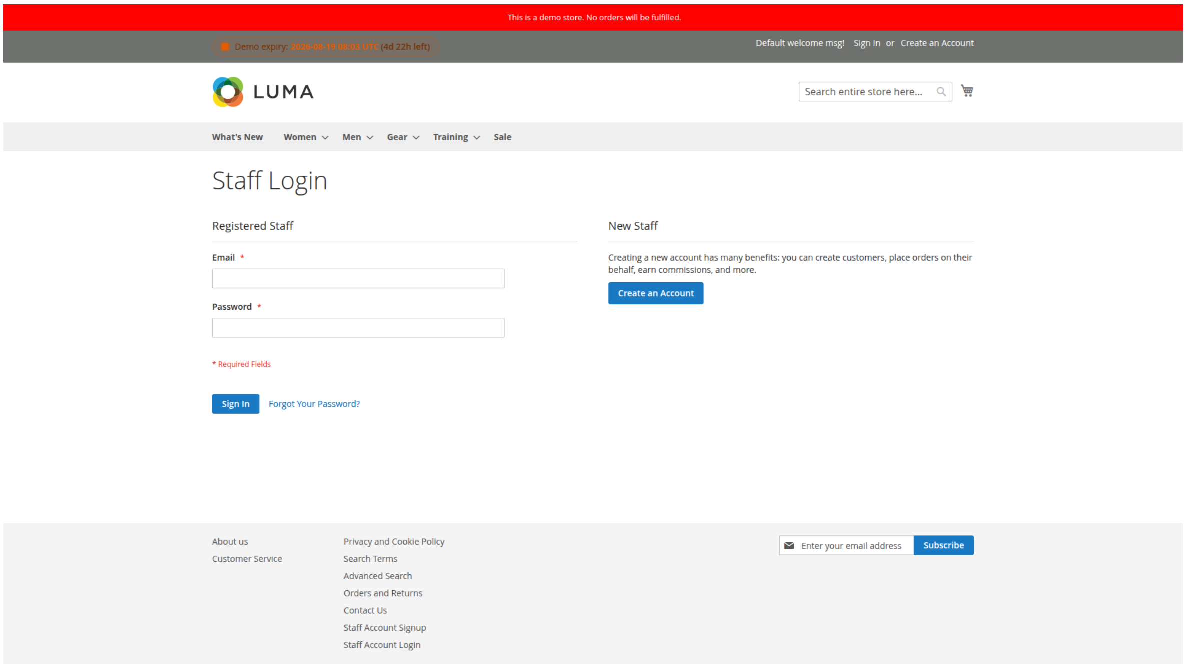
If **Can customer have multiple staff** is off, assigning another representative may change ownership rather than add a teammate. Test this rule before using mass assignment.

Do not enable **Access All Customers** just to bypass an assignment problem. It expands the account to every customer on its website.

4. Test Staff sign-in

Open the storefront route:

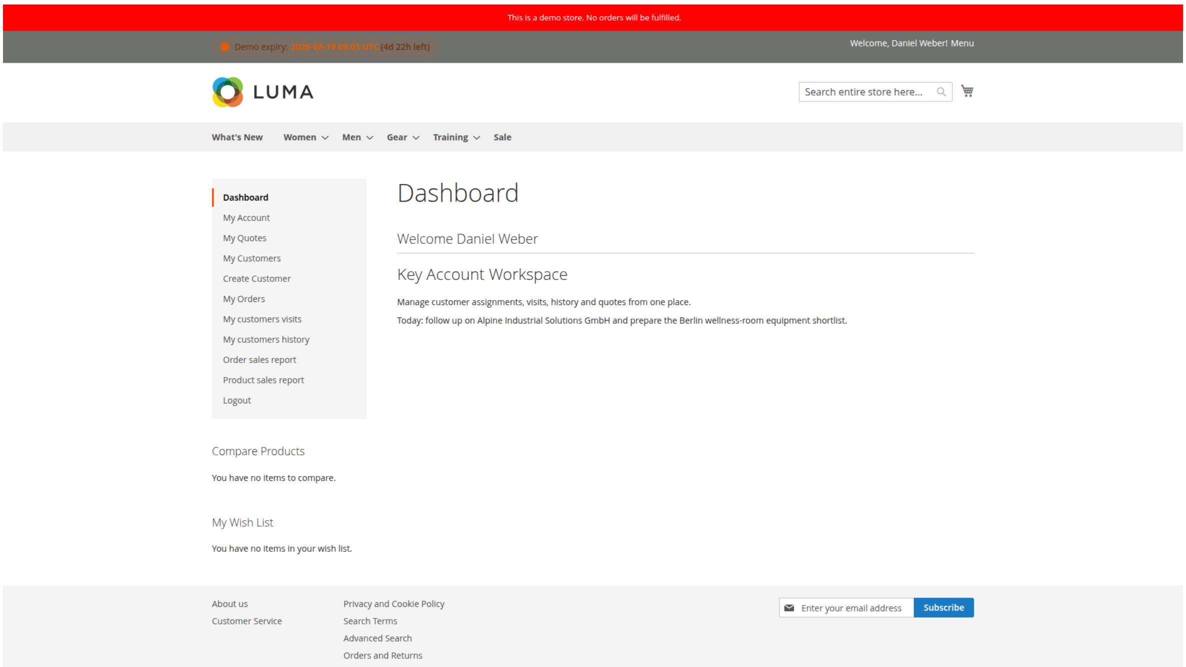
https://<store-domain>/staff/account/login



Sign in as Daniel. The Staff account should show its dashboard, assigned customers and Staff-attributed orders. Commission and report links appear only when their configuration permits them.

If sign-in fails, confirm the account is active, the email belongs to the selected website and the password was set through the current Staff flow.

After sign-in, the dashboard provides the representative's customer, quote, visit, history, order and report workflows.



5. Test customer context

1. Open **My Customers**.
2. Find the assigned fictional customer.
3. Use **Login to this account**.
4. Confirm the storefront now behaves as that customer and shows the customer's permitted catalog and prices.
5. Add a normal product and place a test order using a safe offline payment method.
6. Return through **My Staff Account** or the Staff logout-from-customer action.

The representative should never be able to enter an unassigned customer unless **Access All Customers** is enabled. Test that negative boundary with a second fictional customer.

6. Verify the order

Open the order in Magento Admin and confirm:

- the expected Staff ID and group were stored
- commission matches the configured calculation and representative percentage
- the order appears in the representative's order list and reports
- the intended customer and Staff recipients received email

If **Set staff permanently on order** is enabled, also place an order directly as the customer and confirm the primary representative is attributed according to your policy.

Activate, deactivate and hand over

Deactivate a departed or temporarily blocked representative immediately. An inactive Staff account cannot sign in. Customer records remain in Magento; you can reassign their Staff relationships to another representative.

Changing a Staff group or commission affects subsequent workflow, but historical orders keep the Staff data stored when they were created. Verify that behavior before using reports for compensation.

For a portfolio handover:

1. export or record the current assignments
2. assign the customers to the new representative
3. verify a sample of customer access and primary ownership
4. deactivate the old account
5. check open quotes, visits or other add-on records that may still name the former representative

Before inviting the team

- Test activation and password reset email.
- Confirm Staff cannot reach Magento Admin.
- Confirm an assigned and an unassigned customer boundary.
- Test customer creation only if that permission will be used.
- Test a normal order and, if enabled, an editable order.
- Verify reports and commission with known values.
- Document who may edit prices, reassign customers and change ownership.

Next: Customer Assignment or Order Management.

Customer Assignment

Customer assignment is the main access boundary in Sales Staff. A representative sees the customers assigned to their Staff account unless **Access All Customers** is enabled. Website and configured customer-group restrictions still apply.

Choose an ownership model

With **Can customer have multiple staff** disabled, use assignment as single-representative ownership. This is a good fit for territories or named-account sales.

Enable it when several representatives must work with the same customer, for example an account manager and an inside-sales colleague. Decide which assignment is considered primary because customer-facing representative details and permanent order attribution can depend on it.

Access All Customers bypasses the individual assignment list inside the Staff website. Reserve it for roles that genuinely need the whole portfolio; it should not be used as a shortcut when assignments are incomplete.

Assign customers

The Staff edit form contains a customer grid for selecting customers and reviewing existing relations. Supported customer-side and mass actions may also set a primary representative, depending on the enabled Admin configuration and grid integration.

For a small portfolio:

1. Open **Staff > All Staff**.
2. Edit the representative.
3. Select the intended customers in the customer grid.
4. Save and reopen the Staff account.
5. Sign in as that representative and verify one assigned and one unassigned customer.

For bulk maintenance, use the Import and Export add-on or REST and SOAP API. Test the mapping on a few fictional records before updating a live portfolio.

Assignment comments

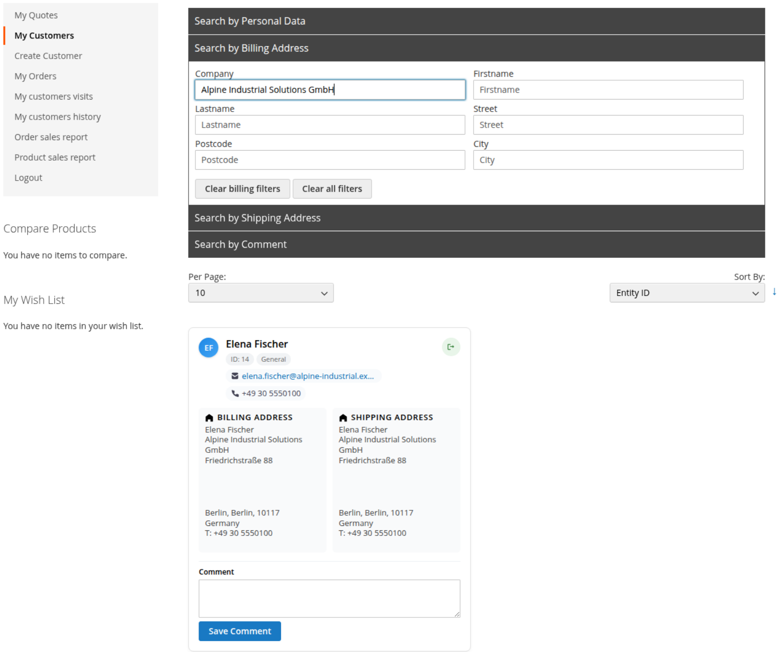
Each Staff-customer relation can store a comment. Use it for short operational context such as `Primary contact: procurement` or `Covering while Elena is on leave`, not for secrets or a full CRM history.

Show comments in my customers list is enabled by default. For longer conversations, files and structured topics, use Customer History.

Customer search

The Staff customer grid always supports core identity search and can expose configured filters for billing address, shipping address and assignment comments. Optional settings add an external customer ID attribute, restrict address matching to default addresses, and control whether the list appears before a search.

The example below narrows Daniel Weber's assigned portfolio by billing company and returns Elena Fischer with the matching Alpine Industrial Solutions address.



For large portfolios, disable **Show all assigned customers by default** so a representative searches before loading results. Keep the page-size limiter enabled unless there is a measured reason to expose every record on one page.

Remove or transfer an assignment

Removing a customer from Staff removes the relationship; it does not delete the Magento customer. If Staff-side removal is needed, enable **Can staff delete his own customers** only for representatives allowed to manage their portfolio.

For a handover:

1. add the new representative first when multiple assignments are allowed
2. verify the new representative can access the customer
3. set or confirm the intended primary ownership
4. review open orders, quotes, visits and history records
5. remove the former assignment
6. deactivate the old Staff account if the person has left

Changing the current assignment does not rewrite Staff data stored on historical orders.

Customer self-reassignment

Can customer reassign own account to another Sales Staff is disabled by default. Enable it only when customers are genuinely allowed to choose their representative. Territory- or contract-based ownership normally needs an internal approval process instead.

Common problems

An assigned customer is not visible

Check the Staff website, customer website, customer-group restrictions, active search filters and whether the assignment was saved. If **Show all assigned customers by default** is off, apply a search before expecting rows.

The representative sees too many customers

Check **Access All Customers** first. Then review multiple-assignment mode, customer-group restrictions and any bulk import or API job that manages relations.

Removing a customer did not delete the account

That is intentional. Sales Staff removes only its relation. Customer deletion remains a separate Magento Admin operation with much broader consequences.

The wrong representative appears on an order

Review who placed the order, which Staff account was primary at the time and whether **Set staff permanently on order** is enabled. The reports use the Staff values stored on the order, not only today's assignment.

Related: Staff Groups, Customer Impersonation and Sales Reports.

Work in Customer Context

Sales Staff can enter the storefront as an assigned customer without knowing the customer's password. This lets a representative view the catalog and pricing available to that customer, prepare the cart and place an order in the customer's account.

The action is customer impersonation, even though the UI describes it as logging in to the customer account. Use it only for a documented service or sales purpose.

Access boundary

A representative can enter customer context only when:

- the Staff session is authenticated
- the customer is assigned to that Staff account, or **Access All Customers** is enabled
- the customer belongs to the Staff account's website

The action is a POST request protected by Magento's form key. Manually changing a customer ID in the request does not grant access.

Start a customer session

1. Sign in through the Staff storefront.
2. Open **My Customers**.
3. Find the assigned customer.
4. Choose **Login to this account**.
5. Confirm the success message names the intended customer.

The extension clears an unrelated guest cart before loading the customer's active cart. It also resets stale order-edit context so a previous task is not carried into the next customer.

Before changing prices or placing an order, read the customer name, website, company and cart contents. This small check prevents work being performed in the wrong account when representatives switch frequently.

What Staff sees

Once customer context is active, Magento uses the customer's group, catalog, prices, cart and checkout rules. Compatible SoftwareSilo pricing or catalog extensions continue to apply through their normal customer context.

Staff permissions add capabilities such as item-price editing or order editing; they do not remove the customer's website boundary. Shipping, payment, tax, stock and minimum-quantity rules remain active unless the relevant Staff order setting explicitly bypasses them.

Leave customer context

Use **My Staff Account** or the Staff action for leaving the customer account. The extension resets the customer session, clears the checkout quote and order-edit markers, invalidates private browser content and returns to the Staff area.

Do not simply close the tab on a shared device. Exit customer context and then sign out of Staff when work is finished.

Operational safeguards

- Give **Access All Customers** only to roles that need it.
- Keep item-price editing disabled for representatives who do not negotiate prices.
- Explain to buyers when a representative will place an order in their account.
- Use order comments or an external approval process when the buyer must authorize the final cart.
- Review Staff attribution and commission on the completed order.
- Train representatives to leave customer context between customers.

Common problems

The login action says access is not allowed

Confirm the assignment, Staff website and customer website. If **Access All Customers** is on, a cross-website customer is still rejected.

The wrong cart appears

Confirm the customer named in the success message. A customer's existing active cart is intentionally loaded; an unrelated guest cart is cleared. Leave customer context before switching customers.

Customer-specific prices do not appear

Check the customer's group and pricing assignments in the same website/store view. Customer context cannot make a missing or inactive pricing rule appear.

The representative cannot edit an item price

Enable **Can Edit Item Price** on the Staff account. Zero-price editing has a separate global setting and is disabled by default.

Returning to Staff leaves stale customer content

Use the provided exit action, then clear private-content/browser cache in a staging reproduction. If it persists, inspect Magento logs and custom theme overrides around customer sections and checkout session handling.

Related: Customer Assignment, Order Management and Customer Creation.

Commission System

Sales Staff can calculate and store a commission amount when an order is first attributed to a representative. The representative's Staff record holds the percentage; the completed order stores the Staff ID, group and calculated amount used by reports.

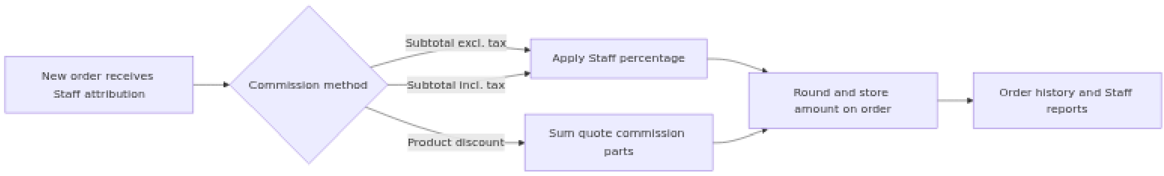
Choose the calculation basis

Under **Stores > Configuration > MageB2B > Staff > Commission settings**, choose one method:

Method	Calculation
Net total excluding tax	Staff percentage × order base subtotal
Net total including tax	Staff percentage × order base subtotal including tax
As discount on every product	Sum of commission parts calculated while Staff-adjusted product prices are applied

The first two methods do not include shipping in their base. They use Magento base-currency totals and round the result through Magento's price-currency service before saving it on the order.

The product-discount method is tied to the quote session in which the adjusted prices were calculated. Test it especially carefully with configurable products, cart rules, reordered carts and Admin-created orders.



Set a representative's percentage

Open **Staff > All Staff**, edit the representative and enter the Commission percentage. A value of `5.0000` means five percent.

For an Admin-created order, the Admin form can supply a commission percentage for the selected representative. If left empty, the Staff account's percentage is used.

When Staff is attributed

For a new storefront order, the active Staff context is used. For an Admin-created order, the Staff selection on the order is used. If **Set staff permanently on order** is enabled, a customer's primary representative can override the normal context for a new customer order.

Once a normal existing order has been saved, routine saves do not recalculate or replace its Staff commission. An explicit Admin reassignment is handled separately. This preserves the original commercial record instead of silently applying today's representative settings to old orders.

Canceled orders have their stored Staff commission set to zero.

Order history and reporting

When a positive commission is calculated, the extension adds an order history comment naming the representative and formatted amount. The amount is also exposed through the order data used by the Staff order report and Magento API extension attributes.

Enable **Show commission for Staff** if representatives should see their percentage and commission values in the Staff storefront. It is disabled by default.

Worked examples

With a 5% Staff percentage:

- base subtotal €1,000 excluding tax → €50 commission
- base subtotal including tax €1,190 → €59.50 commission

These examples assume the corresponding calculation method. Shipping, later invoices and refunds do not change the original formula shown here.

Policy questions to settle first

Before enabling commission for compensation, document:

- whether tax is part of the base
- whether primary assignment or the person who placed the order owns the sale
- how Admin-created and reassigned orders are approved
- how cancellations, refunds and partial returns are handled outside the stored order commission
- who may change a Staff percentage
- whether representatives may see commission values

The extension stores a sales commission value; it does not replace payroll, payout approval or refund reconciliation.

When the amount is zero or unexpected

1. Confirm a valid Staff account was attributed to the order.
2. Check the representative's percentage and the selected calculation method at the relevant scope.
3. Compare the order's base subtotal or base subtotal including tax with the chosen

formula.

4. For product-discount commission, reproduce the quote and price edits in the same Staff/Admin context.
5. Check whether the order is canceled.
6. Review whether permanent primary-Staff attribution or an Admin reassignment changed ownership.
7. Read the order history comment and stored `sales_staff_commission` value rather than recalculating from today's settings.

Related: Sales Reports, Order Management and Customer Assignment.

Customer Creation by Staff

Authorized representatives can create Magento customer accounts from the Staff storefront. This is useful during a sales call or site visit because the new customer is created in the correct website and can be assigned to the representative immediately.

Two controls must both allow the action:

- **Enable creating new customer** under Staff configuration
- **Can Create Customer** on the representative's Staff account

The global setting is enabled by default, but each Staff permission should follow the person's role.

Configure the form

Under **Stores > Configuration > MageB2B > Staff > Customer registration settings**, choose whether the form shows:

- Magento customer group
- address fields
- VAT number
- a password field Staff may complete for the customer

All four are shown or allowed by default in the reviewed configuration.

The **Restrict customer groups** setting under General settings limits the groups available to Staff. Use it to prevent a representative from placing customers into internal, retail or privileged pricing groups.

Create an account

1. Sign in through the Staff storefront.
2. Open the customer-creation action.
3. Search for the email first to avoid a duplicate account.
4. Enter the customer's own name, email and, where needed, company address and VAT number.
5. Choose only a customer group the representative is authorized to use.
6. Save, then confirm the customer appears in the representative's assigned list.

Email is scoped by Magento website. If the address already belongs to a customer on that website, update or assign the existing account instead of inventing another address.

Password onboarding

Although Staff can be allowed to set a customer password, a password-setup email is the safer default process. It avoids representatives reading, sending or recording customer credentials.

The base extension supplies a dedicated template for customers created by Staff. Confirm it is selected in **Stores > Configuration > MageB2B > Staff > Email settings**, is included in **Activated Emails**, and reaches a non-production mailbox before rollout.

Never enable the Staff plain-password email option for this workflow. It is disabled by default.

Address and VAT details

When address fields are shown, representatives should enter only data supplied by the customer. Magento's country and region rules still apply. A VAT number entered here is customer master data; tax validation and pricing behavior still depend on the store's tax and VAT configuration.

Creating a customer does not guarantee that every B2B price, catalog, payment or shipping rule is correct. After saving a realistic staging customer, enter customer context and verify the actual storefront experience.

Common problems

The Create Customer action is missing

Check the global enable setting, the Staff account's **Can Create Customer** permission and the active website/store scope.

A customer group is missing

Review **Restrict customer groups**. The Staff form deliberately excludes groups outside the configured allowlist.

Magento reports a duplicate email

Search the customer list on the same website. Assign the existing customer to Staff rather than creating a second account.

The customer did not receive an email

Check the activated-template allowlist, the customer-password template, Magento mail transport and logs. Saving a customer successfully does not prove the email was delivered.

Staff created the customer but cannot see it

Confirm the resulting Staff-customer relation, the website and customer-group restrictions. Do not solve this by enabling **Access All Customers** unless that broad access is intended.

Related: Customer Assignment, Email Configuration and Customer Impersonation.

Staff Groups

Staff groups organize representatives into named teams such as Field Sales, Inside Sales or Customer Service. Each Staff account belongs to one group, and the group ID is stored with Staff-attributed orders for reporting.

Groups are labels and reporting dimensions in the base extension. They do not automatically grant a permission bundle. Customer access and operational permissions remain on each Staff account unless an installed add-on explicitly adds group-based behavior.

Create a group

1. Open **Staff > Staff Groups**.
2. Choose **Add New Group**.
3. Enter a short, stable name.
4. Save.
5. Select the group on the relevant Staff accounts.

Set **Default Staff Group** under **Stores > Configuration > MageB2B > Staff > General settings**. It is used when a new Staff record has no explicit group. Configure it at the intended scope before allowing public Staff signup or automated provisioning.

Naming groups

Choose names that reflect how reports and administration are actually divided. `North Region` or `Inside Sales` is easier to maintain than a person's name. Avoid encoding temporary commission percentages or permissions in the label because the group does not enforce them.

If territory and function are separate dimensions in your organization, decide which one belongs in Staff groups and maintain the other through assignments or an external CRM. Creating a group for every combination quickly becomes hard to report on.

Changing a representative's group

Edit the Staff account, select the new group and save. New orders use the representative's current group. Existing orders retain the group stored when they were created, so historical reports remain tied to their original record.

For a reorganization, export or record the membership before making bulk changes and verify a new staging order after the change.

Deleting a group

The Staff table has a group relationship. Reassign Staff accounts before deleting a group, and confirm the default configuration does not still refer to it. Historical order rows store their group ID independently; deleting a current group does not make old reporting semantics self-explanatory, so retain an external record of renamed or retired teams.

Admin permissions

Magento Admin ACL separates:

- viewing Staff groups
- saving Staff groups
- deleting Staff groups

An administrator who only reviews sales reports does not need group-edit permission.

Common problems

- **New Staff has the wrong group:** check the default at the active website/store scope and any import, API or SAML mapping.
- **A group is missing from the form:** verify it still exists and refresh Magento cache after configuration changes.
- **Reports show an old group:** historical orders retain the group stored at order creation; this is expected.
- **Changing the group did not change permissions:** base Staff groups do not act as permission roles. Edit the Staff account fields or the relevant add-on's settings.

Related: Create Your First Staff Account, Customer Assignment and SAML Single Sign-On.

Staff Order Management

Order management is part of the Sales Staff base extension. Representatives can view Staff-attributed orders, place orders in customer context and, when permitted, edit an existing order through a controlled checkout flow.

There is no separate `staff-ordermanagement` package to install.

Order visibility and attribution

The Staff order list is based on the representative stored on the order. It is not a list of every order belonging to currently assigned customers.

Representatives can add comments to their orders from the order view; these are stored in the order's status history and remain visible to the back office.

A new storefront order normally receives the active Staff identity. An Admin order can receive the Staff selected in the Admin order form. When **Set staff permanently on order** is enabled, the customer's primary representative can be attributed to a new customer order even when no representative placed it.

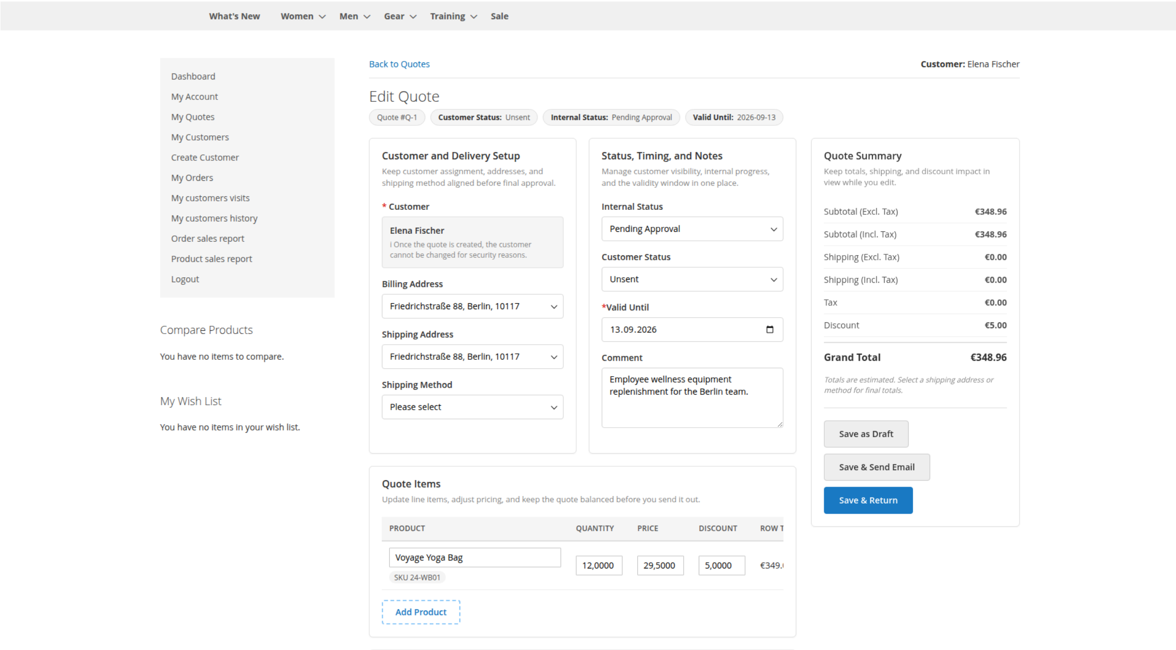
The Staff group and commission are stored with the order at that time, so later group or assignment changes do not silently rewrite history.

Place an order for a customer

1. Enter an assigned customer's context from **My Customers**.
2. Confirm the customer identity, company, website and existing cart.
3. Add products and use only the price-edit permissions granted to the Staff account.
4. Complete shipping, payment and checkout as the customer.
5. Leave customer context through the Staff action.
6. Verify Staff attribution, group, commission and email recipients in Magento Admin.

Magento catalog, price, tax, stock, shipping and payment rules continue to apply unless a Staff configuration explicitly changes them.

When item-price editing is permitted, the quote workspace keeps quantity, adjusted unit price, discount and calculated totals together for review.



Edit an existing order

Order editing requires all of these conditions:

- **Can Edit Orders** is enabled on the Staff account
- the order is attributed to the current representative
- the order state appears in **Order States Allowed for Editing**
- the original quote and store/customer context can be loaded safely

Only **New** is allowed by default.

Starting edit mode creates a new active quote from the original order's quote, copies customer and address context, merges the previous items, recalculates totals and binds that quote to the exact order, customer and store in the checkout session. Staff is then sent to the cart.

During checkout the extension rechecks Staff ownership, allowed state, quote ID, customer and store. A mismatched or stale edit session is cleared rather than applied to another order.

Use **Exit edit order mode** when abandoning the change. It clears the edit quote and customer context and returns to the Staff order list.

Allowed states

Configuration offers New, Pending Payment, Processing, Complete, Closed, Canceled, Holded and Payment Review. Availability in the selector does not mean every state is a sensible business choice.

Editing an invoiced, shipped, captured, refunded or canceled order can conflict with payment and fulfillment records. Keep the default **New** state unless the complete lifecycle has been tested with the store's payment, inventory, tax and ERP integrations.

Optional rule bypasses

The following are disabled by default:

- disregard minimum order amount
- disregard minimum and maximum sale quantity restrictions
- allow backorders for Staff orders

Enable a bypass only for a defined sales process, and test it both during ordinary customer ordering and order-edit checkout. Price editing has separate Staff and zero-price permissions.

Admin grid controls

Add Sales Staff to Order Grid can display Staff attribution in Magento's sales grid. **Add Reassign feature for Sales Staff to Order Grid** adds a mass reassignment action. Both are disabled by default.

Reassignment is a reporting and commission change. Restrict the Admin action and document when existing ownership may be changed.

Email behavior

The Staff email configuration controls whether the customer, representative, both or neither receive the order email. Edited orders use their configured edited-order template path. Test recipients and content with your actual sales-email templates; avoid sending duplicate confirmations to a buyer.

Common problems

Edit is not available

Check **Can Edit Orders**, Staff attribution and the order state. Customer assignment alone does not authorize editing an order owned by another representative.

Edit mode says the session is no longer valid

The quote, customer, store or Staff ownership no longer matches the bound order. Exit edit mode and start again from the Staff order list. Do not reuse an old cart URL.

Products or shipping changed

The edit quote recalculates against current product, stock, address and carrier rules. Compare the revised cart carefully with the original order before submitting.

The order has the wrong Staff member

Check whether it was placed in Staff context, selected in Admin or attributed through the customer's primary representative. Review the permanent-attribution setting at the order's website scope.

Commission changed after reassignment

An explicit Admin reassignment can recalculate Staff data using the selected representative and supplied or default commission percentage. Treat reassignment as a controlled financial action.

Related: Work in Customer Context, Commission System and Sales Reports.

Sales Reports

Order and product reports are included in the Sales Staff base extension. There is no separate Reports add-on to install.

What is available

Magento Admin provides separate Staff order and product report pages. Authorized representatives can also open **Order sales report** and **Product sales report** from their Staff account when frontend reporting is enabled.

The order report ties Magento orders to the responsible representative and includes the stored Staff commission. The product report summarizes products sold through Staff-attributed orders. Both Admin reports have CSV export actions; the Staff frontend reports can also export CSV.

Use the reports to answer specific operational questions, such as which orders belong to a representative, which products they sold, or which commission value was stored when an order was placed. They are not a general CRM forecasting system and do not infer activity that was never attributed to Staff.

Enable frontend reports

Go to **Stores > Configuration > MageB2B > Staff > Report settings** and set **Show sales report for staff in frontend** to **Yes**. It is enabled by default.

If the links are hidden, the Admin reports can still be available to an authorized Magento administrator.

Admin permissions

Grant only the report resources a role needs:

- **Reports for staff**
- **Order report for staff**
- **Product report for staff**

The two child permissions protect their matching page and CSV export. A user who needs order reporting does not automatically need permission to edit Staff accounts.

Attribution and commission caveats

Reports depend on `sales_staff_id`, `sales_staff_group_id` and `sales_staff_commission` stored with the order. An order without Staff attribution will not become a Staff order merely because the customer is currently assigned to a representative.

If **Set staff permanently on order** is enabled, the customer's primary representative may be written to the order even when the representative did not personally place it. Decide whether that rule matches the way your business interprets ownership before comparing individual performance.

Commission is stored on the order. Changing the representative's percentage later does not necessarily rewrite historical order data, which is useful for auditability but important when reconciling reports.

When numbers look wrong

1. Open a sample order and confirm its Staff ID, group and commission were saved.
2. Check whether the order was created in Staff context or attributed through the permanent-assignment setting.
3. Compare the report period and store scope with the order date and website.
4. Confirm the Admin role has the correct report permission.
5. Export the same report to CSV and compare the underlying rows before treating a display total as a data problem.

Related: Commission System, Order Management and Customer Assignment.

API Add-On

The Staff API add-on (`MageB2B_StaffApi`) exposes the Staff service contracts through Magento Web API. Use it to maintain representatives and customer assignments from an ERP or CRM, or to build a Staff-authenticated client.

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`

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 or list Staff users with 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
- `POST /V1/unassign-staffcustomers`: unassign customers from Staff
- `POST /V1/staff/token`: create a token for Staff context
- `GET /V1/staff/customers`: list customers for the current Staff context
- `GET /V1/staff/:staffId/customers`: list customers for a specific Staff ID
- `POST /V1/staff/customers/:customerId/token`: create a customer impersonation token

Authentication and 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.

The token and customer-context routes are declared `anonymous` in `webapi.xml` so a Staff bearer token can reach the service. They are not unrestricted: the service reads the bearer token, checks the Staff identity, limits a representative to their own account and assigned customers, and enforces the Staff website boundary. Admin and integration contexts may use the explicitly supported management paths.

Treat customer tokens as credentials. Send them only over HTTPS, keep them out of logs and URLs, and never expose a long-lived admin token in a browser application.

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": "Elena",
      "lastname": "Fischer",
      "email": "elena.fischer@northstar-industrial.example",
      "phone": "+49 30 5550 1840",
      "status": 1,
      "website_id": 1
    }
  }'
```

Staff token flow

`POST /V1/staff/token` accepts the Staff email and password, applies Magento's credential validation and request throttling, rejects inactive accounts, and returns a Staff access token. Use that token as `Authorization: Bearer <STAFF_TOKEN>` for the customer-context endpoints.

`POST /V1/staff/customers/:customerId/token` creates a Magento customer token only when the Staff account may access that customer. A representative with **Access all customers** is still restricted to the Staff account's website.

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 Add-On

Customer History gives representatives a shared, structured timeline for their customer work. Instead of keeping call notes, meeting outcomes and files in personal inboxes, Staff users can record them against the Magento customer they belong to.

Install

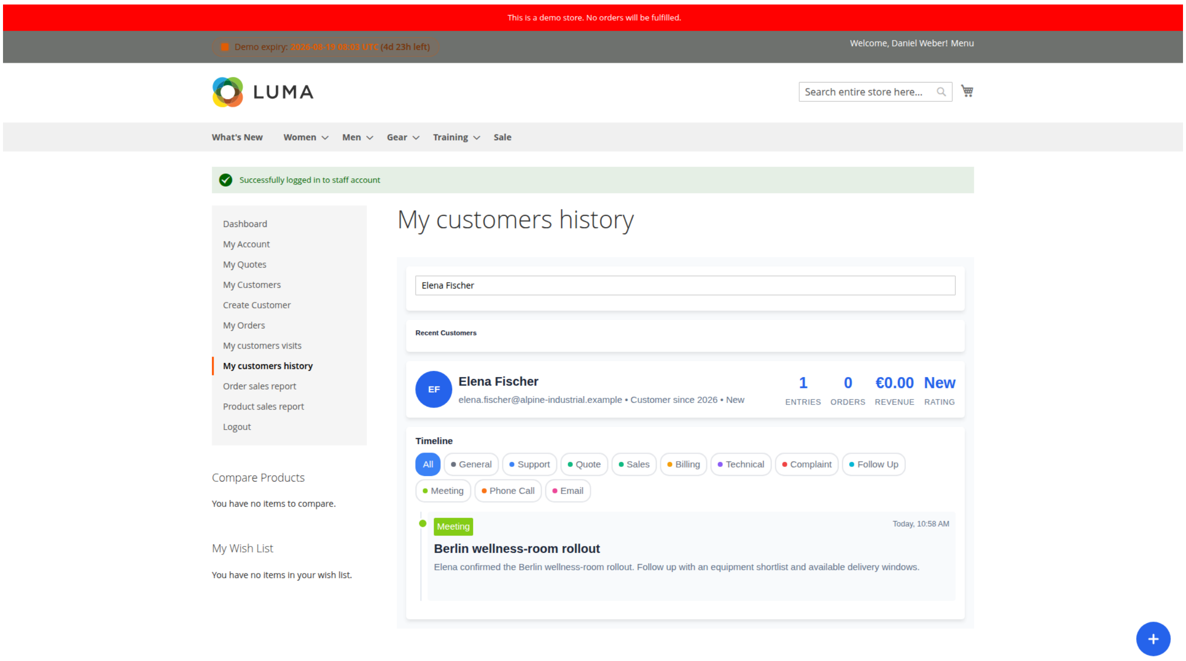
```
composer require mageb2b/staff-customerhistory:*
php bin/magento module:enable MageB2B_StaffCustomerHistory
php bin/magento setup:upgrade
php bin/magento setup:di:compile
php bin/magento cache:flush
```

What representatives can record

An entry contains a customer, topic, title, description and timestamp. Files may be attached, and an entry can be sent to the customer using the configured email template. Staff can list all entries, find recent customers, duplicate an entry and, when allowed, delete their own entries.

The default topics include General, Support, Quote, Sales, Billing, Technical, Complaint, Follow Up, Meeting, Phone Call and Email. Edit this list under **Stores > Configuration > MageB2B > Staff > Customer history** so it matches the language your sales and service teams actually use.

Each Staff account has a **Manage Customer History** permission. A representative still needs access to the selected customer; the add-on does not bypass customer assignments.



Optional order entries

Enable **Add order history as customer history** if placing an order in Staff context should create a timeline entry automatically. It is disabled by default. Leave it off when order records already provide enough detail or when the extra entries would obscure meaningful conversations.

Customer ratings

Rating rules use order count and revenue. Rules are evaluated from top to bottom and the first match wins. The shipped rules classify customers as Premium, Gold, Silver, Bronze or New; the fallback rating is **New**.

Put the most selective rule first. After changing thresholds, test a high-value customer, a new customer and a customer exactly on a boundary.

Attachments

The default extension allowlist is `pdf,doc,docx,odt,xls,csv,jpg,jpeg,png`, the default storage path is `customer_history`, and the default limit is five files per entry. The per-file size setting is empty by default, which means the effective system limit applies.

For production, set a deliberate maximum size, keep the extension list narrow and include the upload directory in your backup and retention plan.

Configuration reference

Setting	Default	Effect
Add order history as customer history	No	Creates a timeline entry when Staff places an order
Available Topics	Eleven preset topics	Controls topic codes, labels and colors
Customer Rating Rules	Preset JSON rules	Evaluates order count and revenue from top to bottom
Default Rating	New	Used when no rule matches
Allowed Extensions	Document, spreadsheet and image list	Limits accepted file suffixes
Base path	`customer_history`	Relative media storage directory
Filesize	Empty	Maximum MB per file; empty uses the system limit
Maximum Files Per Entry	5	Caps attachments on one entry
Staff can delete history entries	Yes	Lets a Staff user remove their own entries

The email template is configured as **Email template to send history email alert to customer** under the Staff email settings.

If an entry or file is missing

1. Confirm the Staff account has **Manage Customer History** enabled.
2. Confirm the customer is assigned to that representative.
3. Check the allowed extension, file count and effective upload-size limit.
4. Verify that Magento can write to the configured media path.
5. If email is the only missing part, check that the history template is active and inspect the Magento mail transport and logs.

Related: Customer Assignment and Customer Visits.

Customer Visits and Calendar Integration

Customer Visit lets representatives plan customer appointments in their Staff workspace. A visit can be onsite, remote, by phone or another type, with a start and end time, address, notes, outcome, follow-up date and optional related order.

Customers can receive visit details by email, confirm or cancel through a time-limited link, and see upcoming and recent visits in their account dashboard. Representatives can download calendar files and synchronize visits to Google Calendar or Microsoft 365.

Install

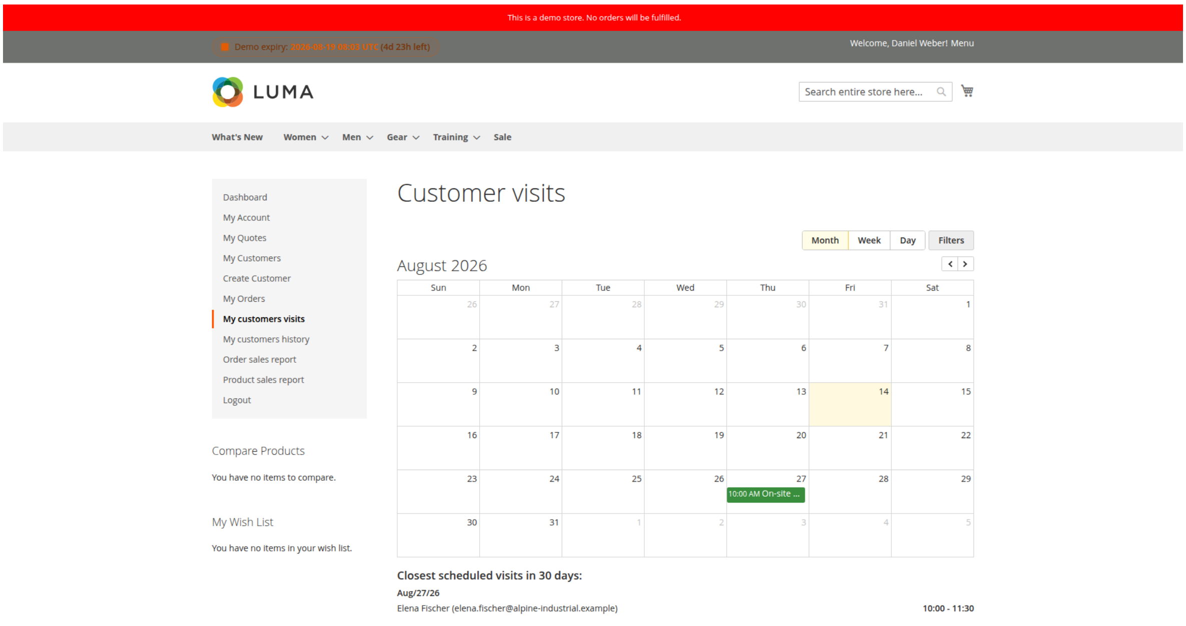
```
composer require mageb2b/staff-customervisit:*
php bin/magento module:enable MageB2B_StaffCustomerVisit
php bin/magento setup:upgrade
php bin/magento setup:di:compile
php bin/magento cache:flush
```

Magento Admin users manage visits under **Staff > Staff Visits**. Staff users work with visits and their calendar from the storefront Staff area.

Plan a visit

1. Open a customer that is assigned to the representative.
2. Create a visit and choose the type, start and end time, and customer address where relevant.
3. Add a clear title and only the notes the customer should be allowed to receive.
4. Decide whether to inform the customer or request confirmation.
5. Save the visit and check its calendar entry.
6. After the appointment, record the outcome, mark the appropriate status and schedule a next visit if needed.

The available states are planned, confirmed, done, cancelled and no-show. The default is **planned**; the default type is **onsite**.



Customer links and calendar files

Confirmation/cancellation links and ICS download links use separate expiring tokens. Both expire after 30 days by default. Changing the expiry affects newly created links; it does not make an old, expired link reusable.

Treat these URLs as private. Do not paste them into public tickets or analytics events. If a customer reports an expired link, update and resend the visit rather than extending the token manually.

Visit settings

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

Setting	Default	Effect
Allow inform customer	Yes	Enables visit-detail emails
Allow accept invitation	Yes	Enables customer confirmation links
Default visit status	Planned	Initial state for new visits
Default visit type	Onsite	Initial appointment type
Closest visits days range	30	Look-ahead period for the closest-visits list
ICS token expiry	30 days	Lifetime of calendar-download links
Customer action link expiry	30 days	Lifetime of confirm/cancel links

Setting	Default	Effect
Show upcoming visits in customer dashboard	Yes	Adds the upcoming block to customer accounts
Show recent visits in customer dashboard	Yes	Adds the recent block to customer accounts
Show weekend days in calendar	Yes	Includes locale-defined weekend days

The reminder cron job runs daily at 06:00. Magento cron must be running for scheduled reminders.

External calendar synchronization

Enable synchronization under **Calendar Integration**, then select one provider.

For Google, configure the OAuth client ID and secret, the exact callback URL and a default calendar ID such as `primary`. For Microsoft, configure the application ID, secret, tenant ID, exact callback URL and calendar owner user principal name or GUID.

Each representative connects their own calendar from the Staff calendar settings. Provider credentials are stored encrypted in Magento configuration, while the per-Staff OAuth record identifies the provider and selected calendar.

Before rollout:

1. Register the exact HTTPS redirect URI shown by the store with the provider.
2. Grant only the calendar permissions required by the integration.
3. Connect one representative in staging.
4. Create, move and cancel a visit and confirm that the external event follows each change.
5. Revoke the connection and verify the Staff UI reports the disconnected state cleanly.

Email templates

The add-on supplies templates for visit creation, updates, cancellation, reminders, customer cancellation, information and approval. They must also be selected in **Stores > Configuration > MageB2B > Staff > Email settings > Activated Emails**. If a visit saves but no email arrives, check that allowlist before changing SMTP settings.

Troubleshooting

- **Customer cannot confirm:** check the link expiry and whether invitation acceptance is enabled.
- **ICS download fails:** create a fresh visit link and verify the store base URL is reachable externally.

- **External event is missing:** check synchronization is enabled, the representative completed OAuth, and the selected calendar still exists.
- **Reminder is late:** confirm Magento cron ran at 06:00 in the store's server time zone.
- **Wrong times appear:** compare Magento locale/time-zone configuration, the representative's calendar zone and the customer-facing email.

Related: Customer History and Field Sales Teams.

GraphQL API

The GraphQL package exposes staff data, staff groups, assigned customers and staff authentication to headless storefronts and integrations.

```
composer require mageb2b/staff-graph-ql:*
php bin/magento setup:upgrade
php bin/magento cache:flush
```

The package requires the Staff base extension (`mageb2b/staff`). This is a technical integration interface; plan it with the developer or agency that maintains the storefront.

Queries

Query	Returns
`staff`	A filtered list of staff records
`staffById(id: Int!)`	One staff record
`staffGroups`	A filtered list of staff groups
`staffGroupById(id: Int!)`	One staff group
`staffMyCustomers`	The customers assigned to the authenticated staff account
`staffCustomersByStaffId`	The customers assigned to a given staff record

Mutations

Mutation	Purpose
`generateStaffToken(email, password)`	Sign a staff account in and receive a bearer token
`revokeStaffToken`	Invalidate the current staff token
`requestStaffPasswordReset(email)`	Send the staff password-reset email
`resetStaffPassword(token, new_password, confirm_password)`	Set a new password with the emailed token

Mutation	Purpose
`createStaffCustomerToken(customer_id)`	Create a customer token for impersonating an assigned customer

Staff identity data includes name, email, phone, status, website, customer access and creation/edit permissions. Customer impersonation through `createStaffCustomerToken` follows the same assignment rules as the storefront **My Customers** area — it does not bypass customer assignment.

Test sign-in, token expiry and customer authorization in staging before exposing the schema to a production storefront. Inspect the installed schema with an introspection query if your version differs.

Related

- API Integration
- Installation and Setup

Hyvä Compatibility

Install the Staff Hyvä package when the active storefront theme is based on Hyvä. It replaces the Luma-oriented Staff presentation for the login and password flows, Staff dashboard and navigation, customer list, customer creation, order list and view, reports, customer-facing representative block and supported cart interactions.

Compatibility reviewed

The `mageb2b/staff-hyva` package requires:

- the Staff base extension (`mageb2b/staff`)
- the Hyvä default theme (`hyva-themes/magento2-default-theme`)

Check the exact versions selected by Composer before deployment rather than assuming every future combination is interchangeable.

Install

```
composer require mageb2b/staff-hyva:*
php bin/magento module:enable MageB2B_StaffHyva
php bin/magento setup:upgrade
php bin/magento setup:di:compile
php bin/magento setup:static-content:deploy
php bin/magento cache:flush
```

Deploy the locales and theme scopes used by the store. If your project compiles Hyvä Tailwind CSS separately, include the Staff templates in the normal theme build and rebuild the CSS after installation.

What to verify

Use an ordinary Staff account in staging and check:

1. sign-in, forgotten password and password creation
2. Staff dashboard and account navigation
3. assigned-customer search and pagination
4. customer creation with the fields enabled in configuration
5. login as an assigned customer and clean return to Staff context
6. Staff order list, order view and any enabled order-edit path
7. order and product reports, including CSV export
8. cart price editing when the representative has permission
9. mobile navigation, forms, validation and focus states

The compatibility package covers the base Staff feature set. Separate Staff add-ons may require their own Hyvä bridge or version-specific support; do not assume this package restyles every optional module.

Troubleshooting

- If a page falls back to Luma markup, confirm the active theme inherits from Hyvä and the matching `hyva_*` layout handle is applied.
- If styling is missing, rebuild the theme CSS and redeploy static content for the correct store and locale.
- If a button renders but does nothing, inspect the browser console and verify the Hyvä-compatible template is active rather than a customization copied from Luma.
- Re-test project theme overrides after every Staff or Hyvä update.

No separate Hyvä screenshots are maintained in this KB yet; the functional checklist above is the release criterion.

Staff Import and Export

The Import/Export add-on is for bulk Staff account maintenance. Magento administrators can export selected representatives from the Staff grid, while imports can be run through Magento's standard import interface or the supplied CLI command.

Install

```
composer require mageb2b/staff-importexport:*
php bin/magento module:enable MageB2B_StaffImportExport
php bin/magento setup:upgrade
php bin/magento setup:di:compile
php bin/magento cache:flush
```

Export selected representatives

Open **Staff > All Staff**, select the rows and use the **Export** mass action. Magento generates a CSV from the selected Staff records. Password hashes and plain passwords are not exported.

Use an export from the same installed version as the safest starting template. Optional add-ons can add Staff fields, so a CSV from another store or release may not have the same columns.

Import a CSV

The package ships a sample file at:

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

Run an add/update import with:

```
php bin/magento staff:import-staff var/import/staff.csv --behavior=add_update --delete_file_after_import=0
```

Supported behaviors:

Behavior	Use it for
`append`	Creating rows without intentionally replacing existing Staff data
`add_update`	Creating new representatives and updating matched records
`replace`	Replacing matched Staff records; validate assignments and add-on fields carefully
`delete`	Deleting the Staff records identified by the import

The command also accepts `--field_separator`, `--field_multiple_value_separator` and `--fields_enclosure`.

Important file-deletion default

`--delete_file_after_import` defaults to `1`. A successful CLI import therefore deletes the source CSV unless you pass `--delete_file_after_import=0`.

Keep the explicit `0` while developing and validating a feed. Once automation is stable, decide deliberately whether a processed file should be deleted, archived elsewhere or retained by the upstream system.

Account emails

Stores > Configuration > MageB2B > Staff > Import settings > Send new staff account email on import is disabled by default. Enable it only when the CSV contains real, ready-to-activate accounts and the Staff email templates have been tested.

For a staged migration, leave email disabled, import into a non-production website, review permissions and customer assignments, then activate and notify representatives through the agreed onboarding process.

Validate before a large import

1. Export two current Staff accounts and compare the headers with the planned feed.
2. Import two fictional accounts into staging with `--delete_file_after_import=0`.
3. Check website, status, group, customer access and operational permissions.
4. Test an update to one account and confirm an unrelated account is unchanged.
5. Test `replace` or `delete` only on disposable data.
6. Review Magento's import output and logs before scheduling the job.

Related: Customer Assignment and REST and SOAP API.

Staff Quote Management

Staff Quote gives representatives and Magento administrators a quotation workspace tied to the Sales Staff customer model. A customer can request a quote, or an authorized representative can prepare one for an assigned customer, set item prices and discounts, choose addresses, shipping and payment, attach files, send a PDF and follow the response through to cart or order.

Install

```
composer require mageb2b/staff-quote:*
php bin/magento module:enable MageB2B_StaffQuote
php bin/magento setup:upgrade
php bin/magento setup:di:compile
php bin/magento cache:flush
```

Enable **Manage Quotes** on each representative who should use the workflow. Magento administrators manage all quotes under **Staff > Staff Quotes**.

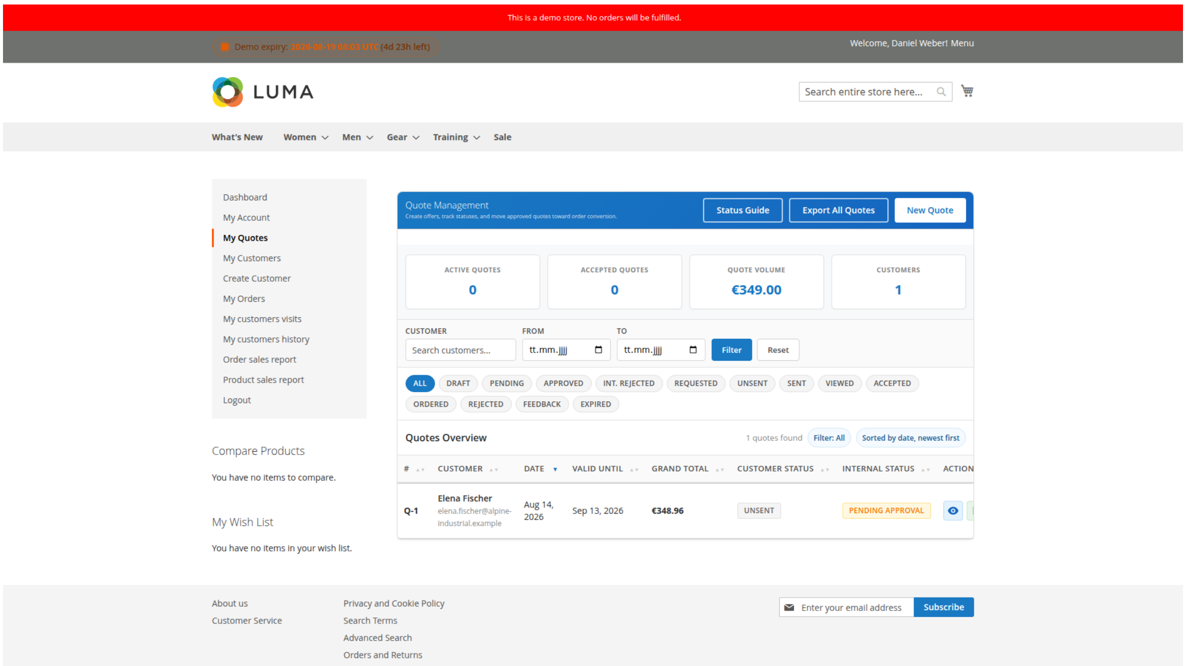
Admin permissions

The add-on provides granular ACL resources for Magento Admin roles under **Staff Quote**: view, create, edit, delete, duplicate, send, change status, generate PDF and view history. Grant only the actions a back-office role actually needs — for example a read-only review role receives **view** and **history** without **edit**, **send** or **delete**.

A practical quote workflow

1. A customer submits a request, or Staff creates a draft for an assigned customer.
2. Staff adds products and quantities, adjusts prices or discounts, and selects billing, shipping and payment details.
3. Staff sets the validity date, adds customer-visible or internal context and uploads relevant files.
4. The quote follows the internal approval state used by the team.
5. Staff sends the approved offer. The customer receives the configured email and, optionally, a PDF and permitted attachments.
6. The customer views the quote, asks for changes, accepts it or rejects it.
7. An accepted quote can be added to the customer's cart. Direct order creation is available only when it is enabled and the quote has complete, valid checkout data.

Staff can also duplicate a quote, recalculate totals, collect shipping rates and generate a PDF. The history records status and action changes so a later user can see what happened.



Internal and customer states

The module deliberately keeps two state tracks:

- Internal: Draft, Pending Approval, Approved or Rejected
- Customer-facing: Customer Requested, Unsent, Sent, Viewed, Feedback, Accepted, Rejected, Expired or Order Created

This prevents an internal review step from being confused with the customer's answer. For example, a quote may be internally approved but still unsent, or customer-accepted but not yet converted into an order.

Expiry and reminders

The default validity period is 30 days. A daily job expires eligible quotes at midnight, and a second job sends reminders at 06:00, three days before expiry by default.

Enable **Require Valid Until Date Before Sending** when every outbound offer must have a customer-visible deadline. Magento cron must be healthy for expiry and reminder automation.

Customer access and token policy

Quote links can be governed by one of three policies:

- **Hybrid:** the logged-in owner may perform most account actions, while quote viewing still requires the token.
- **Login Only:** the logged-in owner does not need the email token.
- **Always Require Token:** even the logged-in owner must present it.

The separate token-action allowlist controls which actions may run without customer login when a valid token is present: viewing, PDF download, acceptance, rejection, feedback, attachment download, add to cart and create order.

Start with the narrowest policy your buying process allows. Do not enable order creation or attachment download for token-only access merely for convenience. Quote tokens and emailed URLs are credentials and should not be logged or forwarded publicly.

Cart and direct order conversion

Adding an accepted quote to cart is enabled by default. Direct customer order creation is disabled by default.

Both flows require an accepted, unexpired quote. Direct order creation also needs a customer, valid addresses, a permitted shipping method for physical products, a permitted payment method and salable products. The module prevents a second order from being created from the same quote.

Admin order creation requires both internal approval and customer acceptance. This two-sided check is useful when sales operations completes conversion for the buyer.

Attachments and email

Customer uploads are enabled by default. The default limit is ten files, 10 MB each, with document, spreadsheet, text and common image extensions allowed. Outgoing emails do not attach existing quote files by default; when enabled, the combined default email limit is 15 MB. Above that limit the email contains a link instead.

Review the extension allowlist, sizes and retention policy before production. A customer-visible attachment should never contain internal pricing notes.

Quote emails have separate templates for the quote, direct send, status updates, expiry reminders, internal notifications and customer requests. Sending the same quote is rate-limited to once per 60 seconds by default.

PDF identity

Configure the company logo, name, address, contact line and footer under **Quote Settings**. Generate a real quote PDF in staging and inspect line wrapping, taxes, discounts, shipping, currency and non-ASCII customer names before using it with buyers.

Key defaults

Setting	Default
Show Request Quote for Customer	Yes
Default Quote Expiry	30 days

Setting	Default
Expiry Reminder	Yes, 3 days before
Quote Number Format	`Q-{increment_id}`
Require Valid Until	No
Add accepted quote to cart	Yes
Direct customer order creation	No
Customer token policy	Hybrid
Customer attachments	Yes, 10 files at 10 MB each
Attach quote PDF to customer email	No
Attach quote files to emails	No
Email send rate limit	60 seconds

Common questions

Why can the representative not open the quote?

Check **Manage Quotes**, the Staff-to-customer assignment and the quote's Staff owner. **Access all customers** still follows the Staff website boundary.

Why can the customer not accept the quote?

Confirm it was sent, has not expired and the current login/token satisfies the configured policy. A rejected or expired quote is terminal and should be duplicated or revised through the Staff workflow instead of forcing its state.

Why are shipping methods empty?

Check the shipping address, website/store, product salability and carrier rules. Recalculate totals and collect rates after changing the address or lines.

Why was no reminder sent?

Confirm the reminder setting, validity date, reminder offset, email template and Magento cron execution at 06:00.

Why can an accepted quote not become an order?

Direct order creation may be disabled, checkout data may be incomplete, a product may no longer be salable, or the quote may already have an order. Review payment and shipping availability in the same store and customer context.

Related: Customer Assignment, Order Management and Staff Quote Sample Data.

Staff Quote Sample Data

`mageb2b/staff-quote-sample-data` adds example products, quotes, line items, history and attachments for the Staff Quote workflow. It requires the Staff Quote add-on and the Staff Sample Data package because its quotes refer to representatives, customers and assignments from the base fixtures.

Use this package only in a disposable demo, development or test environment.

Install

Install the base fixtures first, then the quote fixtures:

```
composer require mageb2b/staff-sample-data:* mageb2b/staff-quote-sample-data:*
php bin/magento module:enable MageB2B_StaffSampleData MageB2B_StaffQuoteSampleData
php bin/magento setup:upgrade
php bin/magento cache:flush
```

Verify the quote fixture set with:

```
php bin/magento sampledata:verify:staff-quote
```

Then open **Staff > Staff Quotes** and check that each quote resolves to an existing representative, assigned customer and product.

Reset the quote fixtures

```
php bin/magento sampledata:reset:staff-quote
```

The reset command removes fixture quote items, attachments, history, quotes and fixture products, and clears the data-patch entry so the package can be installed again. It is destructive by design. Snapshot the database before using it and never treat it as a production cleanup command.

Reset quote fixtures before resetting the base Staff fixtures so their customer and representative dependencies still exist while quote cleanup runs.

Related: Quote Management and Staff Sample Data.

SAML Single Sign-On

The SAML add-on lets Staff users sign in through a SAML 2.0 identity provider. It supports service-provider initiated login, automatic creation of a Staff record on first successful login, claim mapping and single logout.

Staff SAML and Staff TFA are alternative login packages. They cannot be installed together because `mageb2b/staff-tfa` declares a Composer conflict with `mageb2b/staff-saml`. Use SAML when an identity provider controls Staff sign-in. Use Staff TFA when representatives keep their Staff password and add an authenticator code.

Terms used in this article

- **SAML** — a standard that lets one central system (the identity provider) confirm a user's identity to another system (here: the shop).
- **IdP (identity provider)** — the external system that authenticates the user, for example Microsoft Entra ID or Okta.
- **SP (service provider)** — the shop side that trusts the IdP's answer; in this setup, Magento.
- **ACS URL (assertion consumer service)** — the shop URL the IdP sends the signed login answer to.
- **Claim** — a named attribute in the IdP's answer, such as the user's email or group.
- **X.509 certificate** — the public key the shop uses to verify that an answer really comes from your IdP.
- **NameID** — the persistent identifier the IdP assigns to a user, stored on the Staff record.
- **SP-initiated login** — the user starts at the shop's login page and is redirected to the IdP (the alternative, IdP-initiated, starts inside the provider's portal).

Install

```
composer require mageb2b/staff-saml:*
php bin/magento module:enable MageB2B_StaffSaml
php bin/magento setup:upgrade
php bin/magento setup:di:compile
php bin/magento cache:flush
```

Configure it under **Stores > Configuration > MageB2B > Staff > SAML settings**. Keep password login available until the full SAML flow has been tested with an ordinary representative and an emergency recovery account.

Exchange these values with the identity provider

The default endpoints are:

- Assertion Consumer Service: `https://<store-domain>/staff_saml/index/callback`
- SAML login start: `https://<store-domain>/staff_saml/index/login`
- Single logout endpoint: `https://<store-domain>/staff_saml/index/logout`

Magento needs the IdP entity identifier, SSO URL, logout URL and public X.509 certificate. The IdP needs the Staff service-provider identifier and ACS URL. The module uses HTTP POST for the assertion callback and HTTP Redirect for IdP sign-in and logout.

If the **SP Identifier** field is empty, the module uses the store base URL. Set an explicit identifier when the IdP requires a stable entity ID that differs from the current base URL.

Map identity claims

Map the claim paths for:

- email, which identifies the Staff account
- first name and last name
- group value
- Magento website code

The shipped Microsoft-style defaults cover email, given name and surname. Group and website mappings are empty until you configure them.

On first successful login, the module creates an active Staff account with the asserted email, name, website and persistent SAML NameID. On later logins it loads the Staff record by email and website. A disabled Staff account remains blocked even when the IdP authentication succeeds.

Group-to-attribute mapping

The **Group to attributes mapping** field accepts JSON. Its keys are asserted group values; each value contains Staff fields to apply. For example:

```
{
  "field-sales": {
    "group_id": 3,
    "access_all_customers": 0,
    "can_create_customer": 1,
    "can_edit_item_price": 0
  }
}
```

Use the exact group value sent by the IdP, not the human-readable display label unless they are identical. The default group value is used when no group claim is supplied. Keep the mapping limited to known Staff fields and review any permission-expanding change as an access-control change.

Safe rollout

1. Configure SAML at website scope if different websites use different identity providers or claims.
2. Test with password login still enabled.
3. Confirm first-login provisioning creates the expected website, group and permissions.
4. Disable the Staff account in Magento and confirm the IdP can no longer sign it in.
5. Test logout and a new login in a clean browser session.
6. Only then enable **Disable login with username/password**.

The default for password login is disabled when SAML is active, so treat the first production configuration carefully. An incorrect certificate, claim name, website code or IdP URL can lock all representatives out.

Troubleshooting

- **Invalid response or signature:** paste the current IdP signing certificate without changing its contents and check the IdP entity ID.
- **Staff email is empty:** the configured email claim path does not match the assertion.
- **Wrong website:** verify the asserted website code exists; otherwise the current website is used.
- **Wrong permissions:** compare the asserted group value with the JSON keys and validate the referenced Staff group ID.
- **Redirect loop:** confirm the store uses its public HTTPS base URL and that the ACS URL matches the IdP registration exactly.
- **Disabled user still reaches the IdP:** that is expected; Magento rejects the Staff session after the assertion is processed.

Configuration reference

Group	Fields
General	Enable SAML, disable password login, group-to-attribute JSON, default group value, login button text
Identity provider	SP identifier, IdP identifier, IdP login/logout URLs, IdP public certificate
Main attribute mapping	Email, first name, last name, group and website claim paths

Related: Staff Groups and Common Issues.

Staff Sample Data

`mageb2b/staff-sample-data` creates a connected demonstration dataset for Staff: customer groups, customers and addresses, Staff groups, representatives, assignments, products and Staff-attributed orders.

Install it only in a disposable demo, development or test environment. It creates records in Magento's normal customer, catalog and sales tables and is not a harmless visual fixture for a live store.

Install

```
composer require mageb2b/staff-sample-data:*
php bin/magento module:enable MageB2B_StaffSampleData
php bin/magento setup:upgrade
php bin/magento cache:flush
```

The setup data patch installs the fixtures once. Verify the expected fixture records with:

```
php bin/magento sampledata:verify:staff
```

Reset the fixtures

The package provides:

```
php bin/magento sampledata:reset:staff
```

This is a destructive development command. It removes records identified by the package fixtures, including fixture customers, Staff users, groups, assignments and products, and clears the patch record so the data can be installed again. Take a database snapshot first and do not run it where fixture identifiers might overlap data someone intends to keep.

Quote sample data

Staff Quote has its own fixture package. It depends on the base Staff sample data and is documented separately under Staff Quote Sample Data.

There is no `staff-customerhistory-sample-data` package in the reviewed Staff family. Create a few realistic history and visit records manually in a demo when those workflows need examples.

Two-Factor Authentication

The Staff TFA add-on adds a second step to the Staff storefront login. After the password is accepted, a representative enters a six-digit code from an authenticator app. A single-use recovery code can be used when the authenticator device is unavailable.

Staff TFA and Staff SAML cannot be installed together. The `mageb2b/staff-tfa` package declares a Composer conflict with `mageb2b/staff-saml`. Choose TFA for password-based Staff accounts that need an authenticator step, or choose SAML when an identity provider controls Staff sign-in.

Requirements and installation

Staff TFA requires the Staff base extension (`mageb2b/staff`).

```
composer require mageb2b/staff-tfa:*
php bin/magento module:enable MageB2B_StaffTFA
php bin/magento setup:upgrade
php bin/magento setup:di:compile
php bin/magento setup:static-content:deploy
php bin/magento cache:flush
```

Run the static-content command with the locales and deployment strategy used by the store. Install and test the add-on in staging before enabling mandatory TFA.

If Composer reports a conflict with `mageb2b/staff-saml`, decide which login method the project will use. Do not bypass the conflict or copy either module into `app/code`.

Configure TFA

Open **Stores > Configuration > MageB2B > Staff > Two-Factor Authentication**.

Setting	What it controls	Default
Enable TFA for Staff	Makes TFA setup and verification available to Staff accounts	No
Mandatory TFA for All Staff	Sends every Staff account without a configured secret through setup after password login	No
Issuer Name	Name shown next to the account in the authenticator app	Staff Portal

Configuration can be set at default, website or store-view scope. Use a recognizable issuer name so representatives can distinguish this account from other entries in their authenticator app.

Start with TFA enabled but not mandatory. Complete setup and recovery testing with one representative, then enable the mandatory setting if every Staff account should use it.

Enrol a Staff account

When TFA is optional, the representative opens **Setup Two-Factor Authentication** from the Staff account navigation. When it is mandatory, the module sends an unconfigured representative to the setup page immediately after a successful password login.

The setup flow is:

1. Scan the QR code with a compatible authenticator app. The secret is also shown for manual entry.
2. Enter the current six-digit code to confirm that the app and Magento use the same secret.
3. Save the ten recovery codes shown after confirmation. They can be printed or downloaded as a text file.
4. Continue to the Staff dashboard.

The recovery-code screen is shown as part of setup. Store the codes outside Magento and do not send them through a shared chat or ticket.

Sign in with TFA

The normal Staff email and password are checked first. Magento then opens the verification page and does not establish the authenticated Staff session until the second step succeeds.

Enter the six-digit code currently displayed by the authenticator app. If the device is unavailable, select **Use recovery code instead** and enter an unused recovery code. Each recovery code is removed after a successful login and cannot be used again.

Authenticator codes depend on the current time. If a valid-looking code is rejected, confirm that the phone and Magento server clocks are synchronized before resetting the account.

Manage recovery codes

The Staff account page shows whether TFA is enabled and how many recovery codes remain. A representative can generate a new set from the TFA account block. The new set replaces all previous recovery codes.

When TFA is optional, a representative can disable it after entering the current Staff password. Mandatory TFA cannot be disabled from the Staff account or through the Admin disable action.

Reset a locked account

An administrator needs the **TFA Management** permission for the relevant actions. Open the Staff record in Magento Admin and use **Reset TFA** when the representative has lost both the authenticator device and all recovery codes.

Resetting TFA removes the saved authenticator secret and recovery codes. At the next login, the representative must enrol again when TFA is mandatory. If TFA is optional, the account remains without TFA until it is set up again.

Treat a reset request as an account-recovery request. Verify the representative's identity through an agreed internal process before resetting the second factor.

The package defines these Admin permissions:

- TFA Management
- Reset Staff TFA
- Disable Staff TFA

Grant them only to roles responsible for Staff account recovery.

Stored security data

The add-on extends the Staff account record with the enabled state, the authenticator secret and the remaining recovery codes. Magento encrypts the secret and recovery-code data before saving them. Recovery codes are compared as exact, single-use values.

Do not include QR codes, manual secrets, authenticator codes or recovery codes in screenshots or support requests.

Troubleshooting

Setup keeps returning to the QR code

Use the newest code from the same authenticator entry that scanned the displayed QR code. Confirm that cookies and the Staff session persist between the setup page and form submission.

A representative is redirected to setup after every login

Check that setup was completed with a valid code and that the Staff record now shows TFA as enabled. Mandatory TFA continues to require setup until Magento has saved a confirmed secret.

Authenticator codes are rejected

Check the phone and server time, then try the newest code. Do not regenerate the authenticator entry repeatedly, because each new setup produces a different secret.

No recovery codes remain

Generate a new set while the representative can still sign in. If access is already lost, an authorized administrator must reset TFA and the representative must enrol again.

Composer will not install TFA beside SAML

This is expected. Staff TFA conflicts with Staff SAML because they provide alternative Staff login methods. Remove the unneeded authentication add-on through the project's tested Composer deployment process before installing the other one.

Related: Installation and Setup, SAML Single Sign-On and Common Issues.

Field Sales Team

A field representative can use the Staff storefront on a laptop or tablet to find assigned accounts, create a new customer, enter customer context and place an order during a visit. The representative does not need Magento Admin access.

Suggested setup

- Assign named customers rather than using **Access All Customers**.
- Enable customer creation only for representatives who onboard accounts.
- Show address and VAT fields when the representative collects them in person.
- Enable item-price editing only when field negotiation is part of policy.
- Keep zero-price items and order-rule bypasses disabled unless a documented process needs them.
- Use Customer Visits when appointments, outcomes and follow-ups must be recorded.
- Use Customer History for call notes, meeting summaries and attachments.

Day-to-day flow

1. The representative signs in before or at the customer site.
2. They open the assigned customer and verify the company identity.
3. They review previous context, create a visit/history entry where installed, and enter customer context.
4. They prepare the cart using the customer's catalog and prices.
5. The customer confirms the commercial details through the business's normal approval process.
6. Staff places the order and leaves customer context.
7. The representative records the outcome and next action.

Controls worth testing

Test mobile navigation, session expiry, slow connections and leaving customer context. Representatives should know what happens if the browser closes mid-cart or an order submission times out.

If commission is used, decide whether the visiting representative or the customer's primary representative owns the sale. **Set staff permanently on order** changes that interpretation.

Related: Customer Visits, Work in Customer Context and Commission System.

Inside Sales

Inside-sales representatives can handle phone and email orders from a controlled storefront workspace. They search their portfolio, enter the customer's account, build the cart and place the order without receiving Magento Admin permissions.

Suggested setup

- Use assigned portfolios for account ownership, or **Access All Customers** only for a centralized team that truly handles every account.
- Keep the customer list hidden until search for very large portfolios.
- Configure useful search fields such as external customer ID and billing postcode.
- Allow customer creation for authorized onboarding staff.
- Allow item-price editing only for representatives who can negotiate.
- Route order emails to the customer and, if required, copy Staff according to the email policy.
- Enable reports for representatives who need to review their own order/product activity.

Call workflow

1. Search by email, company identifier or address and read the company back to the caller.
2. Enter customer context and review the existing cart before adding anything.
3. Confirm SKU, quantity, price, delivery address and payment method.
4. Place the order, note the Magento order number and leave customer context.
5. Record any non-order follow-up in Customer History instead of an assignment comment.

For revised offers rather than immediate orders, use Staff Quote Management.

Avoid common shortcuts

Do not give all-customer access merely because search is slow, and do not send customer passwords to representatives. If a caller needs account access, use Magento's customer password reset flow. If an order needs changes, use the controlled Staff order-edit flow only in allowed states.

Related: Customer Assignment, Staff Order Management and Customer History.

Territory Management

Sales Staff can model territory ownership through customer assignments and Staff groups. It does not calculate geographic territories automatically; an administrator, import or integration must maintain the assignments.

A workable model

Use Staff groups for the stable reporting dimension, such as North, South or Key Accounts. Assign each customer to the responsible representative and keep **Can customer have multiple staff** disabled when ownership must be exclusive.

If an account manager and backup representative both need access, enable multiple assignment and document which relation is primary. Decide whether primary ownership should also be written to customer orders through **Set staff permanently on order**.

Territory handover

1. Export or record the affected assignments.
2. Add the new representative or bulk-update the relations.
3. Verify access to representative customer samples in each website.
4. Update primary ownership where required.
5. Review open quotes, visits and customer-history responsibilities.
6. Remove old assignments and deactivate departed Staff accounts.
7. Place a staging order and verify group, Staff and commission attribution.

Historical orders retain the Staff and group stored when they were created. A territory change should not rewrite prior-period reporting.

Integration options

Use the Import/Export add-on for controlled CSV batches or the Staff API for an ERP/CRM-owned assignment process. Validate website IDs and customer identifiers before applying a feed; a syntactically valid assignment can still give the wrong representative access to a customer.

Related: Customer Assignment, Staff Groups and REST and SOAP API.

Customer Service Team

Customer-service users can work through Staff accounts when they need assigned-customer access and storefront ordering without Magento Admin. Keep their permissions narrower than a sales representative if they do not negotiate prices or earn commission.

Suggested setup

- assign a defined customer portfolio or, for a centralized desk, grant all-customer access only within the correct website
- disable item-price editing unless service agents issue approved replacements or adjustments
- set commission to zero where the team is not compensated on sales
- enable customer creation only if the desk onboards new accounts
- use Customer History for contacts, complaints and files
- use Customer Visits only if the team schedules appointments
- use Staff Quote only if service agents participate in quotation workflows

Service workflow

1. Confirm the customer's identity and locate the assigned account.
2. Read existing history or orders before entering customer context.
3. Perform the requested storefront action and explain any order or account change.
4. Leave customer context.
5. Record the outcome and any follow-up in the appropriate history or ticket system.

Assignment comments are useful for short routing notes, but they are not a full case-management system.

Related: Work in Customer Context, Customer History and Staff Order Management.

Configuration Fields

This reference lists the Magento Admin settings exposed by the base package and its documented add-ons: `mageb2b/staff`, `mageb2b/staff-customerhistory`, `mageb2b/staff-customervisit`, `mageb2b/staff-importexport`, `mageb2b/staff-quote`.

Configuration paths are included for controlled deployments and `config:set`. Use Magento Admin for normal changes so field validation and scope inheritance still apply. The extension status display is not listed because it reports installation state rather than a configurable value.

`mageb2b/staff`

General settings

Field	Configuration path	Input	Scope
Session lifetime (seconds)	`staff/general/session_lifetime`	Text	Default, Website, Store view
Can customer have multiple staff	`staff/general/customer_have_multiplestaff`	Select	Default, Website, Store view
Enable search customers by staff for frontend	`staff/general/search_customers_by_staff`	Select	Default, Website, Store view
Add footer link for staff signup	`staff/general/add_footer_link_staff_signup`	Select	Default, Website, Store view
Add footer link for staff login	`staff/general/add_footer_link_staff_login`	Select	Default, Website, Store view
CMS page for privacy policy link on signup form	`staff/general/signup_privacy_policy`	Select	Default, Website
List customers in frontend	`staff/general/list_customers`	Select	Default, Website, Store view
Activate check and staff in frontend	`staff/general/activate_check_add_staff`	Select	Default, Website, Store view
Login post url handle	`staff/general/staff_loginpost_redirect`	Text	Default, Website, Store view

Field	Configuration path	Input	Scope
Can staff delete his own customers?	`staff/general/staff_can_delete_customer`	Select	Default, Website, Store view
Can customer reassign own account to another Sales Staff (Frontend)?	`staff/general/can_customer_reassign_another_staff`	Select	Default, Website, Store view
Reset link expiration period (hours)	`staff/general/reset_link_expiration_period`	Text	Default, Website
Login token expiration period (minutes)	`staff/general/login_token_expiration_minutes`	Text	Default, Website
Minimum Password Length	`staff/general/minimum_password_length`	Text	Default, Website
Required Character Classes Number	`staff/general/required_character_classes_number`	Text	Default, Website
Show comments in my customers list	`staff/general/show_comments_in_my_customers_list`	Select	Default, Website
Display staff in customer dashboard	`staff/general/display_staff_in_customer_dashboard`	Select	Default, Website
Display primary staff account only	`staff/general/display_primary_staff_only`	Select	Default, Website
Default staff image	`staff/general/staff_default_image`	Image	Default
Show all assigned customers by default inside my customers section	`staff/general/show_customers_by_default`	Select	Default, Website
Enable External Customer ID on customer grid	`staff/general/enable_external_customer_id_on_customer_grid`	Select	Default, Website
External Customer ID attribute code	`staff/general/external_customer_id_attribute_on_customer_grid`	Text	Default, Website
Allow 0 Price on Item Price Edit	`staff/general/allow_zero_price_on_item_price_edit`	Select	Default, Website

Field	Configuration path	Input	Scope
Restrict customer groups	`staff/general/restrict_customer_groups`	Multi-select	Default, Website
Set staff permanently on order	`staff/general/set_staff_id_permanently_on_order`	Select	Default, Website
Search filters for customer grid	`staff/general/search_filters_for_customer_grid`	Custom control	Default, Website
Filter default billing address only	`staff/general/filter_default_billing_address_only`	Select	Default, Website
Filter default shipping address only	`staff/general/filter_default_shipping_address_only`	Select	Default, Website
Enable limiter on Customer Grid	`staff/general/enable_limiter_on_customer_grid`	Select	Default, Website
Default Staff Group	`staff/general/default_staff_group`	Select	Default, Website
Not allowed handles	`staff/general/not_allowed_handles`	Custom control	Default

Visibility dependencies:

- `staff/general/display_primary_staff_only` is available when `staff/general/display_staff_in_customer_dashboard` is `1`.
- `staff/general/external_customer_id_attribute_on_customer_grid` is available when `staff/general/enable_external_customer_id_on_customer_grid` is `1`.

Commission settings

Field	Configuration path	Input	Scope
Commission type	`staff/commission/commission_type`	Select	Default, Website, Store view
Show commission for Staff at my staff account page at frontend?	`staff/commission/show_commission_for_staff`	Select	Default, Website, Store view

Report settings

Field	Configuration path	Input	Scope
Show sales report for staff in frontend	`staff/report/show_at_frontend`	Select	Default, Website, Store view

Admin settings

Field	Configuration path	Input	Scope
Add Sales Staff to Order Grid	`staff/admin/add_sales_staff_to_order_grid`	Select	Default, Website, Store view
Add Reassign feature for Sales Staff to Order Grid	`staff/admin/add_reassign_sales_staff_to_order_grid`	Select	Default, Website, Store view

Customer registration settings

Field	Configuration path	Input	Scope
Enable creating new customer	`staff/customer_registration/enable_creating_new_customer`	Select	Default, Website, Store view
Show customer group field on customer registration	`staff/customer_registration/show_customer_group`	Select	Default, Website, Store view
Show address fields on customer registration	`staff/customer_registration/show_address`	Select	Default, Website, Store view
Show vat field	`staff/customer_registration/show_vat_field`	Select	Default, Website, Store view
Can Staff set password for customer	`staff/customer_registration/staff_can_password_customer`	Select	Default, Website, Store view

Staff Order Management

Field	Configuration path	Input	Scope
Order States Allowed for Editing	`staff/order_edit/allowed_order_state`	Multi-select	Default, Website, Store view
Disregard Minimum Order Amount for Staff Orders	`staff/order_edit/disregard_min_order_amount`	Select	Default, Website, Store view
Disregard Quantity Restrictions for Staff Orders	`staff/order_edit/disregard_min_qty_min_sale_qty`	Select	Default, Website, Store view
Allow Backorders for Staff Orders	`staff/order_edit/allow_backorders`	Select	Default, Website, Store view

Email settings

Field	Configuration path	Input	Scope
Activated Emails	`staff/email/enabled_templates`	Multi-select	Default, Website, Store view
Apply following settings to	`staff/email/apply_settings_to`	Multi-select	Default, Website
Email order to	`staff/email/email_order_to`	Select	Default, Website
Sent email copy to staff when customer is placing an order	`staff/email/customer_order_email_copy`	Select	Default, Website, Store view
Email template new staff	`staff/email/staff_new_template`	Select	Default, Website, Store view
Email template password for customer created by staff	`staff/email/staff_set_password_customer_template`	Select	Default, Website, Store view
Email template for staff activation	`staff/email/staff_activated`	Select	Default, Website, Store view

Field	Configuration path	Input	Scope
Email template for staff de-activation	`staff/email/staff_de_activated`	Select	Default, Website, Store view
Email template for staff forgot password	`staff/email/forgot_password`	Select	Default, Website, Store view
Email template for staff password updated	`staff/email/password_updated`	Select	Default, Website, Store view
Send plain password in staff account emails	`staff/email/use_plain_password`	Select	Default, Website
CC Receiver for staff emails	`staff/email/send_cc`	Text	Default, Website, Store view
BCC Receiver for staff emails	`staff/email/send_bcc`	Text	Default, Website, Store view
Send order email from fixed Store View	`staff/email/send_order_email_from_fixed_storeview`	Select	Default, Website
Staff name and email details	`staff/email/name_email_details`	Text	Default, Website, Store view

Visibility dependencies:

- `staff/email/customer_order_email_copy` is available when `staff/general/set_staff_id_permanently_on_order` is `1`.

Pricesystem settings

Field	Configuration path	Input	Scope
Display additional pricesystem prices	`staff/pricesystem/use_dropdown_as_cart_price_edit_field`	Select	Default, Website

`mageb2b/staff-customerhistory`

Customer history

Field	Configuration path	Input	Scope
Add order history as customer history	`staff/history/add_order_history_as_customer_history`	Select	Default, Website
Available Topics	`staff/history/topics`	Custom control	Default, Website, Store view
Customer Rating Rules	`staff/history/customer_rating_rules`	Custom control	Default, Website
Default Rating	`staff/history/customer_rating_default`	Text	Default, Website
Allowed Extensions	`staff/history/allowed_extensions`	Text area	Default, Website
Base path	`staff/history/files_upload_path`	Text	Default, Website
Filesize	`staff/history/maximum_file_size`	Text	Default, Website
Maximum Files Per Entry	`staff/history/max_files_per_entry`	Text	Default, Website
Staff can delete history entries	`staff/history/allow_delete_own_history`	Select	Default, Website

Email

Field	Configuration path	Input	Scope
Email template to send history email alert to customer	`staff/email/history_email_alert`	Select	Default, Website, Store view

`mageb2b/staff-customervisit`

Visit Settings

Field	Configuration path	Input	Scope

Field	Configuration path	Input	Scope
Allow inform customer	`staff/visit/inform_customer`	Select	Default, Website, Store view
Allow accept invitation	`staff/visit/accept_invitation`	Select	Default, Website, Store view
Default visit status	`staff/visit/default_status`	Select	Default, Website, Store view
Default visit type	`staff/visit/default_visit_type`	Select	Default, Website, Store view
Closest visits days range	`staff/visit/closest_days_range`	Text	Default, Website, Store view
ICS token expiry (days)	`staff/visit/ics_token_expiry_days`	Text	Default, Website, Store view
Customer action link expiry (days)	`staff/visit/customer_action_link_expiry_days`	Text	Default, Website, Store view
Show upcoming visits in customer's Account Dashboard	`staff/visit/show_upcoming_visits_in_dashboard`	Select	Default, Website, Store view
Show recent visits in customer's Account Dashboard	`staff/visit/show_recent_visits_in_dashboard`	Select	Default, Website, Store view
Show weekend days in calendar	`staff/visit/show_weekend_days_in_calendar`	Select	Default, Website, Store view

Calendar Integration

Field	Configuration path	Input	Scope
Enable external calendar synchronization	`staff/calendar_integration/sync_enabled`	Select	Default, Website, Store view
External calendar provider	`staff/calendar_integration/sync_provider`	Select	Default, Website, Store view
Google Client ID	`staff/calendar_integration/google_client_id`	Protected text	Default, Website, Store view
Google Client Secret	`staff/calendar_integration/google_client_secret`	Protected text	Default, Website, Store view
Google OAuth Redirect URI	`staff/calendar_integration/google_redirect_uri`	Text	Default, Website, Store view
Google Calendar ID	`staff/calendar_integration/google_calendar_id`	Text	Default, Website, Store view
Microsoft Client ID	`staff/calendar_integration/microsoft_client_id`	Protected text	Default, Website, Store view
Microsoft Calendar User ID	`staff/calendar_integration/microsoft_user_id`	Text	Default, Website, Store view
Microsoft Client Secret	`staff/calendar_integration/microsoft_client_secret`	Protected text	Default, Website, Store view
Microsoft Tenant ID	`staff/calendar_integration/microsoft_tenant_id`	Protected text	Default, Website, Store view
Microsoft OAuth Redirect URI	`staff/calendar_integration/microsoft_redirect_uri`	Text	Default, Website, Store view

Visibility dependencies:

- `staff/calendar_integration/sync_provider` is available when `staff/calendar_integration/sync_enabled` is `1`.
- `staff/calendar_integration/google_client_id` is available when `staff/calendar_integration/sync_enabled` is `1`.
- `staff/calendar_integration/google_client_id` is available when

`staff/calendar_integration/sync_provider` is `google`.
- `staff/calendar_integration/google_client_secret` is available when `staff/calendar_integration/sync_enabled` is `1`.
- `staff/calendar_integration/google_client_secret` is available when `staff/calendar_integration/sync_provider` is `google`.
- `staff/calendar_integration/google_redirect_uri` is available when `staff/calendar_integration/sync_enabled` is `1`.
- `staff/calendar_integration/google_redirect_uri` is available when `staff/calendar_integration/sync_provider` is `google`.
- `staff/calendar_integration/google_calendar_id` is available when `staff/calendar_integration/sync_enabled` is `1`.
- `staff/calendar_integration/google_calendar_id` is available when `staff/calendar_integration/sync_provider` is `google`.
- `staff/calendar_integration/microsoft_client_id` is available when `staff/calendar_integration/sync_enabled` is `1`.
- `staff/calendar_integration/microsoft_client_id` is available when `staff/calendar_integration/sync_provider` is `microsoft`.
- `staff/calendar_integration/microsoft_user_id` is available when `staff/calendar_integration/sync_enabled` is `1`.
- `staff/calendar_integration/microsoft_user_id` is available when `staff/calendar_integration/sync_provider` is `microsoft`.
- `staff/calendar_integration/microsoft_client_secret` is available when `staff/calendar_integration/sync_enabled` is `1`.
- `staff/calendar_integration/microsoft_client_secret` is available when `staff/calendar_integration/sync_provider` is `microsoft`.
- `staff/calendar_integration/microsoft_tenant_id` is available when `staff/calendar_integration/sync_enabled` is `1`.
- `staff/calendar_integration/microsoft_tenant_id` is available when `staff/calendar_integration/sync_provider` is `microsoft`.
- `staff/calendar_integration/microsoft_redirect_uri` is available when `staff/calendar_integration/sync_enabled` is `1`.
- `staff/calendar_integration/microsoft_redirect_uri` is available when `staff/calendar_integration/sync_provider` is `microsoft`.

`mageb2b/staff-importexport`

Import settings

Field	Configuration path	Input	Scope
Send new staff account email on import	`staff/import/send_email_on_new_account_creation`	Select	Default, Website

`mageb2b/staff-quote`

Quote Settings

Field	Configuration path	Input	Scope
Show Request Quote for Customer	`staff/quote/show_request_menu`	Select	Default, Website, Store view
Default Quote Expiry (Days)	`staff/quote/quote_expiry_days`	Text	Default, Website, Store view
Enable Expiry Reminder	`staff/quote/enable_expiry_reminder`	Select	Default, Website, Store view
Days Before Expiry to Remind Customer	`staff/quote/reminder_days_before`	Text	Default, Website, Store view
Quote Number Format	`staff/quote/quote_number_format`	Text	Default, Website, Store view
PDF Company Logo	`staff/quote/pdf_logo_path`	Image	Default, Website, Store view
PDF Company Name	`staff/quote/pdf_company_name`	Text	Default, Website, Store view
PDF Company Address	`staff/quote/pdf_company_address`	Text	Default, Website, Store view

Field	Configuration path	Input	Scope
PDF Company Contact	`staff/quote/pdf_company_contact`	Text	Default, Website, Store view
PDF Footer Text	`staff/quote/pdf_footer_text`	Text area	Default, Website, Store view
Require Valid Until Date Before Sending	`staff/quote/require_valid_until`	Select	Default, Website, Store view
Allow customer to create order from accepted quote	`staff/quote/allow_customer_create_order`	Select	Default, Website, Store view
Allow customer to add accepted quote to cart	`staff/quote/allow_customer_add_to_cart`	Select	Default, Website, Store view
Show Quote History on Customer Quote Page	`staff/quote/show_history_customer_quote`	Select	Default, Website, Store view
Customer Quote Token Policy	`staff/quote/customer_token_policy`	Select	Default, Website, Store view
Allow token-only customer quote actions	`staff/quote/customer_token_actions`	Multi-select	Default, Website, Store view
Allow Customer Attachments	`staff/quote/allow_customer_attachments`	Select	Default, Website, Store view
Allowed Attachment Extensions (CSV)	`staff/quote/allowed_extensions`	Text	Default, Website, Store view

Field	Configuration path	Input	Scope
Max Attachment Size (MB)	`staff/quote/max_attachment_size_mb`	Text	Default, Website, Store view
Max Attachments per Quote	`staff/quote/max_attachments_per_quote`	Text	Default, Website, Store view

Visibility dependencies:

- `staff/quote/reminder_days_before` is available when `staff/quote/enable_expiry_reminder` is `1`.

Email

Field	Configuration path	Input	Scope
Send Rate Limit (Seconds)	`staff/email/send_rate_limit_seconds`	Text	Default, Website, Store view
Add Quote PDF as attachment	`staff/email/attach_pdf_to_customer`	Select	Default, Website, Store view
Quote Email Template	`staff/email/quote_template`	Select	Default, Website, Store view
Send Quote to Customer Email Template	`staff/email/quote_to_customer_template`	Select	Default, Website, Store view
Status Update Email Template	`staff/email/quote_status_update_template`	Select	Default, Website, Store view
Expiry Reminder Email Template	`staff/email/quote_expiry_reminder_template`	Select	Default, Website, Store view
Internal Notification Email Template	`staff/email/quote_internal_notification_template`	Select	Default, Website, Store view

Field	Configuration path	Input	Scope
Customer Quote Request Email Template	`staff/email/customer_quote_request_template`	Select	Default, Website, Store view
Attach Quote Files to Emails	`staff/email/attach_quote_attachments`	Select	Default, Website, Store view
Max Total Attachments Size (MB)	`staff/email/max_total_attachments_mb`	Text	Default, Website, Store view

Database Reference

Staff adds sales representatives and their customer assignments without replacing Magento customer or order records. Optional add-ons extend that relationship with history, visits and representative-created quotes.

Staff and customer ownership

Relationship	Why it matters
`customer_salesstaff` belongs to one `customer_salesstaff_group`	Groups representatives for permissions, reporting or organizational structure.
`customer_salesstaff_customer` links one `customer_salesstaff` with one `customer_entity`	Defines which customers a representative may manage.

Customer History and Customer Visit add-ons

Relationship	Why it matters
`customer_salesstaff_customer_history` belongs to one `customer_entity` and one `customer_salesstaff`	Keeps representative notes and activity with the customer account they concern.
`customer_salesstaff_customer_history_file` belongs to one `customer_salesstaff_customer_history`	Stores attachments with the correct history entry.
`customer_salesstaff_visit` belongs to one `customer_salesstaff` and one `customer_entity`	Records the customer covered by a planned or completed visit.
`customer_salesstaff_visit` can refer to one `customer_address_entity`	Connects an on-site visit with the selected customer location.

Staff Quote add-on

Relationship	Why it matters
`customer_salesstaff_quote` belongs to one `customer_salesstaff`	Records the representative responsible for the quote.
`customer_salesstaff_quote` can belong to one `customer_entity`	Associates the quote with the selected customer.
`customer_salesstaff_quote` belongs to one `store`	Preserves the Store View and commercial context used for the quote.
`customer_salesstaff_quote` can create one `sales_order`	Links an accepted representative quote to its Magento order.
`customer_salesstaff_quote_item` belongs to one `customer_salesstaff_quote` and one `catalog_product_entity`	Stores the products and negotiated line details.
Quote history and attachments belong to one `customer_salesstaff_quote`	Preserve changes, communication and supporting files with the quote.

Authentication tokens and internal processing fields are not included. Use the Staff account, Admin screens or module APIs for changes so customer access and attribution rules remain intact.

Common Issues

Start with the failing identity and scope: Magento Admin user, Staff account or customer; then note the website/store view, URL and exact action. Many Staff problems are assignment or configuration-scope issues rather than installation failures.

Staff menu is missing in Magento Admin

1. Check `php bin/magento module:status MageB2B_Staff`.
2. Run `php bin/magento setup:upgrade` after a new installation or update.
3. Confirm the Admin role has the Staff management, group, report or configuration resource needed for that page.
4. Clean Magento cache and sign the Admin user in again.

Do not grant the full Admin role merely to reveal one menu item.

Staff cannot sign in

Check that the account is active, the email and password are correct, and the Staff website matches the storefront. Test the forgotten-password flow and verify the reset link has not exceeded the configured two-hour default.

If SAML is installed, determine whether password login is disabled. A valid IdP session still cannot activate a disabled Magento Staff account.

Password reset email does not arrive

Confirm the forgotten-password and password-updated templates are selected in **Activated Emails**, the Staff email belongs to the current website, and Magento can reach the mail transport. Inspect Magento logs and the non-production mailbox before requesting another reset repeatedly.

Assigned customers are empty

Check:

- the relation was saved on the Staff account
- Staff and customer belong to the same website
- restricted customer groups do not exclude the customer
- active grid filters are not hiding it
- **Show all assigned customers by default** is not disabled

Access All Customers is not a suitable diagnostic fix because it broadens access.

Staff can see the wrong customer

Review **Access All Customers**, multiple-assignment mode, the Staff website and the assignment import/API process. Reproduce with one assigned and one unassigned fictional customer and record the IDs involved.

Login as customer is rejected

The customer must be assigned to the current representative unless all-customer access is enabled, and the website must match. The action also requires a valid POST/form key, so an old page or cached form may need to be refreshed.

Customer context or cart looks stale

Leave through the provided Staff action rather than closing the tab. This clears the customer session, checkout quote and order-edit markers. If stale content remains, reproduce in a clean browser session and inspect custom theme/private-content overrides.

Create Customer is missing

Both the global **Enable creating new customer** setting and the Staff account's **Can Create Customer** permission must be enabled. Customer-group restrictions can also remove choices from the form.

Item price cannot be edited

Enable **Can Edit Item Price** on the Staff account. A price of zero needs the separate **Allow 0 Price on Item Price Edit** setting, disabled by default. Catalog, product and compatible pricing rules still need to allow the item in the customer's store context.

Staff cannot edit an order

The order must be attributed to the current representative, **Can Edit Orders** must be enabled on the Staff account and the order state must be configured as editable. Only New is allowed by default.

If edit mode reports an invalid session, exit it and restart from the Staff order list. Do not reuse a previously opened cart URL.

The order has the wrong representative

Check whether it was placed in Staff context, selected in Magento Admin or attributed from the customer's primary representative by **Set staff permanently on order**. Historical orders use their stored Staff values, not the customer's current assignment.

Commission is zero

Confirm the order has a Staff ID, the representative has a percentage, the calculation method is selected and the order is not canceled. Compare the stored base subtotal with the configured formula. Product-discount commission also depends on the quote context in which Staff pricing was calculated.

Reports are missing

Reports are included in the base extension. Enable **Show sales report for staff in frontend** for Staff navigation and grant the corresponding Admin ACL resources for Magento Admin reports and exports.

An optional package does not appear

Confirm its Composer package and Magento module are installed, run setup upgrade, compile DI and clean cache. Then check the package-specific configuration and Staff permission.

The GraphQL package requires the Staff base extension. Staff TFA and Staff SAML are alternative authentication packages and cannot be installed together.

What to collect for support

Provide:

- Magento, PHP, `mageb2b/staff` and relevant add-on versions
- website/store view and route
- whether the actor is Admin, Staff or customer
- the exact error message and timestamp
- sanitized steps using fictional identities
- relevant Magento exception/system log entries
- whether the issue reproduces with a standard theme and without project overrides

Never include passwords, access tokens, SAML assertions, customer quote tokens or real customer data.

Related: Configuration and Email Configuration.

Email Configuration

Staff email settings live under **Stores > Configuration > MageB2B > Staff > Email settings**. A template must be selected for its event and included in **Activated Emails** before the extension sends it.

Base templates

The base extension supplies templates for:

- new Staff account
- password setup for a customer created by Staff
- Staff activation and deactivation
- forgotten Staff password
- Staff password updated

Optional packages add their own visit, history or quote templates. After installing an add-on, revisit **Activated Emails** rather than assuming every new template became active.

Order recipients

Email order to can send to nobody, customer and Staff as recipients, customer only, customer with Staff as BCC, or Staff only. The default is customer only.

The separate customer-order copy is relevant when a customer orders directly and permanent primary-Staff attribution is enabled. Test it with an attributed customer order because an unassigned order has no representative to copy.

CC and BCC fields apply to Staff emails selected by the extension. Use role mailboxes with an agreed retention policy, not personal addresses added for debugging.

Passwords

Send plain password in staff account emails is disabled by default and should remain disabled. Use password-creation and reset links. Never troubleshoot delivery by putting a known password into a template.

Test safely

In a non-production mailbox, trigger:

1. new Staff account
2. activation and deactivation
3. forgotten password and completed reset
4. customer creation by Staff
5. Staff-attributed order using the intended recipient option

6. one event from each installed email-producing add-on

Read the recipient, sender/store identity, links, translated store view and customer/Staff names in the rendered message.

If an email is missing

1. Confirm the event completed successfully in Magento.
2. Check the template is selected and active at the correct scope.
3. Check recipient routing and that the expected Staff/customer email is present.
4. Inspect Magento logs and the configured queue/cron if mail is asynchronous.
5. Send an unrelated Magento transactional email to separate Staff configuration from transport failure.
6. Check spam/quarantine and provider logs.

Do not paste SMTP credentials, bearer tokens, quote links or SAML data into support screenshots.

Related: Configuration and Common Issues.

FAQ

Is a Staff account a Magento Admin user?

No. Staff has a separate storefront sign-in and does not receive Magento Admin access. Magento Admin roles control the backend Staff management and report pages.

Can one customer have several representatives?

Yes, when **Can customer have multiple staff** is enabled. Decide which relation is primary because customer-facing details and permanent order attribution may use it.

Does removing an assignment delete the customer?

No. It removes the Staff-customer relationship only. The Magento customer remains.

Can Staff access customers on another website?

Not through the supported customer-context checks. An assigned customer or all-customer Staff account is still restricted to its configured website unless the Staff website ID is deliberately global.

Can a representative place an order without the customer's password?

Yes. An authorized representative can enter an assigned customer's context from the Staff workspace. They should leave customer context through the Staff action after completing the work.

Can Staff edit an existing order?

Yes, when the Staff account has **Can Edit Orders** enabled, owns the order and the order's state is allowed in configuration. Only New is allowed by default.

Are reports a separate add-on?

No. Order and product reports are part of the current Staff base extension.

How is commission calculated?

Choose base subtotal excluding tax, base subtotal including tax, or product-level discount. The representative's percentage is applied and the resulting amount is stored on the order. Canceled orders have zero Staff commission.

Does changing a representative update old orders?

No. Historical orders retain the Staff ID, group and commission stored with them. Explicit Admin reassignment is a separate action and should be controlled.

Can Staff create customers?

Yes, when both the global customer-creation setting and the Staff account's **Can Create Customer** permission are enabled.

Should Staff set customer passwords?

Prefer the customer password-setup email. The configuration can allow Staff to enter a password, but sharing customer credentials creates unnecessary risk. Plain-password email is disabled by default and should stay disabled.

Is Staff GraphQL available for the documented version?

Yes. The `mageb2b/staff-graph-ql` package requires the Staff base extension and provides staff queries plus token, password-reset and impersonation mutations. See the GraphQL article.

Is there a Staff two-factor-authentication add-on?

Yes. Staff TFA adds a six-digit authenticator-code step and single-use recovery codes to the password-based Staff login. It cannot be installed together with Staff SAML. See Two-Factor Authentication.

Are sample-data packages safe in production?

No. They create and reset normal Magento customers, products, orders, Staff records and quotes. Use them only in disposable development or demo environments.