



**SOFTWARESILOS**

# **Sales Staff Extension**

PDF Manual

MODULE

**staff**

LAST UPDATED

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# Customer History

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

The Customer History add-on (MageB2B\_StaffCustomerHistory) adds a structured customer history/timeline for staff users, including configurable topics, attachments, and optional email alerts.

## Installation

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

## What It Adds

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

Screenshot placeholder: customer history timeline inside staff customer view

## Configuration

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

Defaults:

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

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

- `staff/email/history_email_alert` (default: staff\_email\_history\_email\_alert)

## Topics

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

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

## File Attachments

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

## Notes

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