Customer History Add-On

Sales Staff Extension

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

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2026-08-22	Open this article online	Magento 2 Extension Sales Staff

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

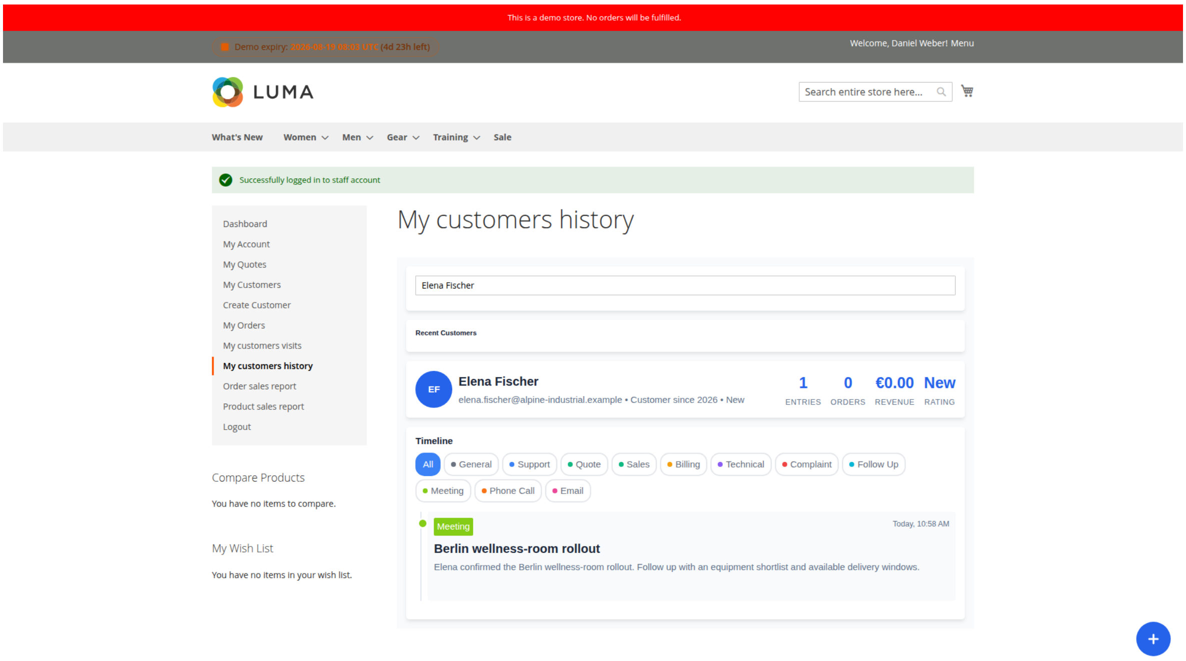
```
composer require mageb2b/staff-customerhistory:*
php bin/magento module:enable MageB2B_StaffCustomerHistory
php bin/magento setup:upgrade
php bin/magento setup:di:compile
php bin/magento cache:flush
```

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.