



Customer Visits and Calendar Integration

Sales Staff Extension

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

LAST UPDATED
2026-09-20

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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**.

This is a demo store. No orders will be fulfilled.

Demo expiry: 2025-08-15 16:45 (17) (48 23h left)
Welcome, Daniel Weber! Menu

Search entire store here...

What's New Women ▾ Men ▾ Gear ▾ Training ▾ Sale

- Dashboard
- My Account
- My Quotes
- My Customers
- Create Customer
- My Orders
- My customers visits**
- My customers history
- Order sales report
- Product sales report
- Logout

Compare Products

You have no items to compare.

My Wish List

You have no items in your wish list.

Customer visits

Month Week Day Filters

August 2026

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

Closest scheduled visits in 30 days:

Aug/27/26

Elena Fischer (elena.fischer@alpine-industrial.example)

10:00 - 11:30

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](#).