



SOFTWARESILOS

Sales Staff Extension

PDF Manual

MODULE

staff

LAST UPDATED

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Customer Visits

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

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

Installation

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

Admin: Manage Visits

Admin menu:

- **Staff > Staff Visits**

Screenshot placeholder: Admin visit grid + visit editor

Staff Frontend: Calendar Integration

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

Screenshot placeholder: Staff calendar integration settings page

Configuration

Visit Settings

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

Defaults:

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

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

Calendar Integration

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

Key settings:

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

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

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

Emails and Templates

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

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

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

Important template ids:

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

Notes

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