Sales Staff Extension

PDF Manual

MODULE

staff

LAST UPDATED

2026-03-29

Customer Assignment

Sales Staff Extension · /staff/features/customer-assignment

Learn how to assign customers to sales staff and manage customer-staff relationships.

Overview

The Customer Assignment system allows you to:

- Assign specific customers to staff members
- Support one-to-one or many-to-many relationships
- Add notes and comments per customer
- Grant access to all customers for managers
- Track a **primary staff** per customer (used for display and optional order assignment)

Assignment Methods

Method 1: From Staff Account

Navigate: Staff > All Staff

1. Edit staff account
2. Scroll to **Customers** section
3. Use filters to find customers:
    - Name
    - Email
    - Customer Group
    - External Customer ID
4. Select customers (checkboxes)
5. Save staff account

Advantages:

- Bulk assignment
- See all assigned customers in one place

Method 2: From Customer Account

Navigate: Customers > All Customers

1. Edit customer account
2. Set the **Primary staff** value
3. Save customer

Advantages:

- Quick single assignment
- Set primary staff (used for dashboard display and order assignment if enabled)
- Customer-centric view

Method 3: Mass Assignment

Navigate: Customers > All Customers

1. Select multiple customers (checkboxes)
2. **Actions** dropdown > **Assign Primary Sales Staff**
3. Select staff member
4. Apply action

Advantages:

- Fastest for bulk operations
- Territory assignments
- Staff changes

Method 4: Import/Export

Requires: MageB2B_StaffImportExport add-on

1. Export current assignments
2. Edit CSV file
3. Import updated assignments

Advantages:

- Large-scale operations
- External data integration
- Backup and restore

Assignment Types

One-to-One Assignment

Configuration:

- **Can customer have multiple staff**: No

Behavior:

- Each customer should have exactly one staff relationship
- The system uses the customer's **Primary staff** to represent that relationship
- When the primary staff changes, the previous staff assignment is removed automatically (so you don't accumulate multiple assignments by accident)

Use Case: Territory-based sales, exclusive customer relationships

Example:

```
Customer A → Staff 1
Customer B → Staff 2
Customer C → Staff 1
```

Many-to-Many Assignment

Configuration:

- **Can customer have multiple staff**: Yes

Behavior:

- Customers can be assigned to multiple staff accounts
- The customer can still have **one** primary staff
- All assigned staff can access the customer (unless you restrict access via other settings)

Use Case: Team-based sales, account management teams

Example:

```
Customer A → Staff 1 (Primary), Staff 2, Staff 3
Customer B → Staff 2 (Primary), Staff 4
Customer C → Staff 1 (Primary)
```

Access All Customers

Configuration:

- Staff account: **Access All Customers**: Yes

Behavior:

- Staff can access any customer
- No explicit assignment needed
- Useful for managers, customer service

Use Case: Senior sales, customer support, management

Primary Staff

What is Primary Staff?

Primary staff is stored with the customer account and is used for:

- Displaying the assigned sales contact in the customer account dashboard (if enabled)
- Assigning orders to the primary staff when **Set staff permanently on order** is enabled

Setting Primary Staff

From Customer Grid (bulk):

1. Customers > All Customers
2. Select customers
3. Actions > **Assign Primary Sales Staff**
4. Pick staff

From Customer Edit (single):

1. Customers > All Customers > Edit customer
2. Set **Primary staff**
3. Save

Primary Staff Benefits

- **Order Assignment**: Orders can be assigned to primary staff (optional setting)
- **Customer Communication**: Primary contact for customer
- **Reporting**: Primary staff in reports

Customer Comments

Adding Comments

Purpose: Track customer-specific information

Examples:

- "Prefers phone orders"
- "Net 30 payment terms"
- "VIP customer - priority service"
- "Contact before 2 PM only"

Add Comment: Comments are typically managed by staff users in the frontend:

1. Login as staff
2. Go to **Customers**
3. Add/update the comment for a customer

Admins can still *view* comments in the staff-customer assignment grids.

Viewing Comments

Staff Dashboard:

- Go to **Customers**
- Comments visible in grid (if enabled)
- Hover for full comment

Configuration:

- **Show comments in my customers list**: Yes

Access Control

Customer Group Restrictions

Configuration: Stores > Configuration > MageB2B > Staff > General

- **Restrict customer groups**: Select groups

Behavior:

- Staff can only see selected customer groups

- Other groups are hidden
- Useful for B2B/B2C separation

Example:

```
Staff Group: B2B Sales
Restricted to: Wholesale, Distributor
Cannot see: General, Retail
```

Website-Specific Staff

Behavior:

- Staff accounts are website-specific
- Staff customer filtering by website depends on website sharing scope configuration
- Multi-store isolation

Use Case: Multi-brand operations, regional websites

Customer Search & Filters

Standard Filters

Available in **Customers** grid:

- **Name**: First name, last name
- **Email**: Customer email
- **Customer Group**: Group filter
- **City**: Billing/shipping city
- **State**: Billing/shipping state
- **ZIP**: Postal code
- **Country**: Country filter

External Customer ID

Configuration:

- **Enable External Customer ID on customer grid**: Yes
- **External Customer ID attribute code**: `erp_customer_id`

Use Case: ERP integration, legacy system IDs

Example:

```
Customer: Acme Corp
External ID: ERP-12345
Staff can search: ERP-12345
```

Address Filters

Configuration:

- **Filter default billing address only**: Yes
- **Filter default shipping address only**: Yes

Benefit: Improved performance for large customer bases

Custom Search Filters

Configuration: Stores > Configuration > MageB2B > Staff > General

- **Search filters for customer grid**: Configure filters

Options:

- Enable/disable filters
- Reorder filters (drag & drop)
- Custom attribute filters

Customer List Display

Show Customers by Default

Configuration:

- **Show customers by default**: Yes/No

Yes: All customers displayed immediately **No**: Customers shown only after search

Recommendation:

- Yes: < 100 customers per staff
- No: > 100 customers per staff

Records Per Page

Configuration:

- **Enable limiter on Customer Grid**: Yes

Options: 10, 20, 50, 100, 250, All

Benefit: Staff can choose preferred view

Removing Customer Assignments

Remove from Staff Account

1. Edit staff account
2. Find customer in **Customers** grid
3. Click **Remove** or **Delete** icon
4. Save staff account

Result: Customer-staff relationship removed, customer account remains

Staff Can Delete Customers

Configuration:

- **Can staff delete his own customers**: Yes

Behavior:

- Staff can remove customer assignments from frontend
- Only removes relationship, not customer account
- Useful for territory changes

Mass Assignment Note

The customer grid mass action supports **Assign Primary Sales Staff**. Bulk removal of staff-customer relations is handled through staff/customer edit flows.

Customer Reassignment

Customer Self-Reassignment

Configuration:

- **Can customer reassign own account to another Sales Staff**: Yes

Behavior:

- Customer can choose their sales representative
- Available in customer dashboard
- Staff receives notification

Use Case: Customer preference, territory changes

Admin Reassignment

Scenario: Staff member leaves company

Process:

1. Go to **Customers > All Customers**
2. Filter by departing staff
3. Select all customers
4. **Actions** > **Assign Primary Sales Staff**
5. Select new staff member
6. Submit

Result: All customers transferred to new staff

Best Practices

Territory Management

Strategy:

```
1. Define territories (North, South, East, West)
2. Create staff groups per territory
3. Assign customers by ZIP code or state
4. Use mass assignment for efficiency
```

Team-Based Sales

Strategy:

```
1. Enable multiple staff per customer
2. Assign account manager (primary)
3. Assign support staff (secondary)
4. Use comments to define roles
```

Customer Service

Strategy:

```
1. Create "Customer Service" staff group
2. Enable "Access All Customers"
3. Set commission to 0%
4. Focus on support, not sales
```

Performance Optimization

For Large Customer Bases:

- Disable "Show customers by default"
- Enable address filters (default only)
- Use external customer ID for quick search
- Enable limiter for pagination

Reporting

Assignment Reports

Available Data:

- Customers per staff member
- Unassigned customers
- Multiple staff assignments
- Primary staff distribution

Access: Staff > Reports

Customer Distribution

Metrics:

- Total customers per staff

- Customers per staff group
- Average customers per staff
- Unassigned customer count

Troubleshooting

Customer Not Visible to Staff

Check:

1. Customer is assigned to staff
2. Customer group not restricted
3. Website scope/sharing settings allow the customer to appear
4. Staff status is Active

Cannot Assign Customer

Check:

1. Customer exists
2. Staff account is Active
3. No customer group restrictions
4. Correct website selected

Multiple Staff Conflicts

Issue: Customer has multiple staff, unclear who is primary

Solution:

1. Edit customer account
2. Verify primary staff checkbox
3. Only one staff should be primary
4. Save customer

Next Steps

Learn about customer impersonation:

Customer Impersonation →