



**SOFTWARESILOS**

# **Sales Staff Extension**

PDF Manual

MODULE

**staff**

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# Customer Creation

*Sales Staff Extension · /staff/features/customer-creation*

Learn how sales staff can create new customer accounts directly from the frontend.

## Overview

The Frontend Customer Creation feature allows staff to:

- Create customer accounts without admin access
- Set customer groups during creation
- Add address information
- Set initial passwords
- Configure VAT numbers
- Streamline B2B onboarding

## Enable Feature

### Staff Permission

**Location:** Staff > All Staff > Edit Staff

**Setting:** **Can create Customer** = Yes

### System Configuration

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

**Settings:**

- **Enable creating new customer:** Yes
- **Show customer group field:** Yes/No
- **Show address fields:** Yes/No
- **Show vat field:** Yes/No
- **Can Staff set password for customer:** Yes/No

## Create Customer Process

### Step 1: Access Creation Form

**From Staff Dashboard:**

1. Login as staff
2. Go to **Customers**
3. Click **Create Customer Account**

**Quick Access:**

- Dashboard widget: "Create Customer"
- Top menu: Customers > Create New

## Step 2: Fill Customer Information

### Required Fields:

- **First Name**
- **Last Name**
- **Email** (must be unique)

### Optional Fields:

- **Customer Group** (if enabled)
- **Phone**
- **Company**
- **VAT Number** (if enabled)
- **Date of Birth**
- **Gender**

### Example:

```
First Name: John
Last Name: Doe
Email: john.doe@acmecorp.com
Phone: +1 555-0123
Company: Acme Corporation
Customer Group: Wholesale
VAT Number: DE123456789
```

## Step 3: Add Address (Optional)

If "Show address fields" = Yes:

### Billing Address:

- Street Address
- City
- State/Province
- ZIP/Postal Code
- Country
- Phone

### Shipping Address:

- Same as billing (checkbox)
- Or enter different address

### Example:

```
Street: 123 Main Street
City: New York
State: NY
ZIP: 10001
Country: United States
Phone: +1 555-0123
```

## Step 4: Set Password (Optional)

If "Can Staff set password for customer" = Yes:

### Option A: Set Password

- Enter password
- Confirm password
- Customer can login immediately

### Option B: Send Email Invitation

- Leave password empty
- Customer receives email with set password link
- Customer sets own password

**Recommendation:** Use email invitation for security

## Step 5: Save Customer

Click **Create Customer Account**

### What Happens:

1. Customer account created
2. Customer automatically assigned to staff
3. Staff marked as primary
4. Email sent to customer (if configured)
5. Redirect to the customer creation page ([salesstaff/index/register](#))

## Configuration Options

### Customer Group Selection

**Enable:** Show customer group field = Yes

### Use Cases:

- Classify B2B vs B2C
- Apply different pricing
- Set different permissions
- Segment customers

### Available Groups:

- General
- Wholesale
- Retailer
- Distributor
- VIP
- (Custom groups)

**Default Group:** General (if not selected)

## Address Fields

**Enable:** Show address fields = Yes

**Benefits:**

- Complete customer profile immediately
- Ready for first order
- No additional setup needed

**When to Disable:**

- Quick customer creation
- Address added later
- Customer adds own address

## VAT Number

**Enable:** Show vat field = Yes

**Use Cases:**

- EU B2B customers
- Tax exemption
- Compliance requirements
- Invoice requirements

**Validation:**

- Format validation (optional)
- VIES validation (optional)
- Duplicate check

## Password Setting

**Enable:** Can Staff set password for customer = Yes

**Option A: Staff Sets Password**

- **Pros:** Customer can login immediately
- **Cons:** Security concern, password sharing

**Option B: Email Invitation**

- **Pros:** More secure, customer controls password
- **Cons:** Requires email access, extra step

**Recommendation:** Use email invitation for B2B

## Email Notifications

### Customer Welcome Email

**Template:** Customer New Account

**Sent When:** Customer created

**Contains:**

- Welcome message
- Account details
- Login link
- Set password link (if no password set)
- Contact information

## Password Email

**Template:** Customer Password Set by Staff

**Sent When:** Staff sets password

**Contains:**

- Account created notification
- Username (email)
- Set-password URL
- Login link
- Security reminder

**Security Note:** Consider using invitation instead

## Validation & Errors

### Email Already Exists

**Error:** "Email address already exists"

**Cause:** Email used by another customer or staff

**Solution:**

- Use different email
- Check if customer already exists
- Contact existing customer

### Invalid Email Format

**Error:** "Please enter a valid email address"

**Cause:** Email format incorrect

**Examples:**

- Missing @
- Invalid domain
- Special characters

**Solution:** Correct email format

## Required Fields Missing

**Error:** "This is a required field"

**Cause:** Required field empty

**Solution:** Fill all required fields (marked with \*)

## VAT Number Invalid

**Error:** "Invalid VAT number"

**Cause:** VAT format incorrect or not verified

**Solution:**

- Check VAT format for country
- Verify with VIES (EU)
- Contact customer for correct VAT

## Best Practices

### Data Quality

**Ensure:**

- Correct email address
- Valid phone number
- Complete address
- Correct customer group
- Valid VAT number

**Verify:**

- Ask customer to confirm email
- Test phone number
- Verify company name
- Check VAT number

## Customer Groups

**Strategy:**

- Define clear group criteria
- Document group benefits
- Train staff on selection
- Review assignments regularly

**Examples:**

```
Wholesale: Min order $500, Net 30 terms
Retailer: Min order $200, Net 15 terms
VIP: No minimum, Net 60 terms, 5% discount
```

## Security

### Password Policy:

- Use email invitation when possible
- Strong password requirements
- Never share passwords via insecure channels
- Customer changes password on first login

### Data Protection:

- Verify customer identity
- Comply with GDPR/privacy laws
- Secure data transmission
- Regular data audits

## Workflow

### Efficient Process:

1. Collect customer information (phone, email, meeting)
2. Verify information
3. Create account in system
4. Send welcome email
5. Follow up to confirm receipt
6. Assist with first order

## Bulk Customer Creation

**Requires:** MageB2B\_StaffImportExport add-on

### Import Customers

#### Process:

1. Download CSV template
2. Fill customer data
3. Upload CSV file
4. Map fields
5. Validate data
6. Import customers

#### CSV Format:

```
firstname,lastname,email,phone,company,customer_group,vat_number
John,Doe,john@example.com,555-0123,Acme Corp,Wholesale,DE123456789
Jane,Smith,jane@example.com,555-0124,Beta Inc,Retailer,DE987654321
```

## Benefits

- Fast bulk onboarding

- Consistent data format
- Reduced errors
- Time savings

## Mobile / Headless Integrations

**Requires:** MageB2B\_StaffApi add-on

If you want to build a custom mobile app or integrate an external system, the Staff API provides token-based authentication and staff/customer management endpoints. Features like OCR scanning, GPS tagging, attachments, or offline mode are app-side implementation details (not provided by the Magento module itself).

## Integration

### CRM Integration (External)

**Sync with:**

- Salesforce
- HubSpot
- Zoho CRM
- Microsoft Dynamics

**Sync Options:**

- One-way (Magento → CRM)
- Two-way (bidirectional)
- Real-time
- Scheduled

### ERP Integration (External)

ERP integration is typically implemented via REST/API middleware or custom Magento integrations. A common pattern is to sync:

- customer master data
- payment terms
- pricing references / external customer IDs

## Reporting

### Customer Creation Report

**Metrics:**

- Customers created per staff
- Customers created per period
- Customer group distribution
- Conversion rate (created → ordered)

**Location:** Reports > Staff > Customer Creation

# Troubleshooting

## Cannot Create Customer

### Check:

1. Staff permission: "Can create Customer" = Yes
2. Configuration: "Enable creating new customer" = Yes
3. Staff account is active
4. No validation errors

## Email Not Sent

### Check:

1. Email configuration correct
2. Email template configured
3. Customer email valid
4. SMTP settings correct

## Customer Not Assigned to Staff

### Check:

1. Auto-assignment enabled
2. Staff session active
3. No errors during creation
4. Configuration scope and assignment settings

## Next Steps

- [Customer Assignment](#) →
- [Customer Impersonation](#) →
- [Staff Groups](#) →