Customer Creation by Staff

Sales Staff Documentation

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

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EXTENSION
Magento 2 Extension Sales Staff

Customer Creation by Staff

Authorized representatives can create Magento customer accounts from the Staff storefront. This is useful during a sales call or site visit because the new customer is created in the correct website and can be assigned to the representative immediately.

Two controls must both allow the action:

- **Enable creating new customer** under Staff configuration
- **Can Create Customer** on the representative's Staff account

The global setting is enabled by default, but each Staff permission should follow the person's role.

Configure the form

Under **Stores > Configuration > MageB2B > Staff > Customer registration settings**, choose whether the form shows:

- Magento customer group
- address fields
- VAT number
- a password field Staff may complete for the customer

All four are shown or allowed by default in the reviewed configuration.

The **Restrict customer groups** setting under General settings limits the groups available to Staff. Use it to prevent a representative from placing customers into internal, retail or privileged pricing groups.

Create an account

1. Sign in through the Staff storefront.
2. Open the customer-creation action.
3. Search for the email first to avoid a duplicate account.
4. Enter the customer's own name, email and, where needed, company address and VAT number.
5. Choose only a customer group the representative is authorized to use.
6. Save, then confirm the customer appears in the representative's assigned list.

Email is scoped by Magento website. If the address already belongs to a customer on that website, update or assign the existing account instead of inventing another address.

Password onboarding

Although Staff can be allowed to set a customer password, a password-setup email is the safer default process. It avoids representatives reading, sending or recording customer

credentials.

The base extension supplies a dedicated template for customers created by Staff. Confirm it is selected in **Stores > Configuration > MageB2B > Staff > Email settings**, is included in **Activated Emails**, and reaches a non-production mailbox before rollout.

Never enable the Staff plain-password email option for this workflow. It is disabled by default.

Address and VAT details

When address fields are shown, representatives should enter only data supplied by the customer. Magento's country and region rules still apply. A VAT number entered here is customer master data; tax validation and pricing behavior still depend on the store's tax and VAT configuration.

Creating a customer does not guarantee that every B2B price, catalog, payment or shipping rule is correct. After saving a realistic staging customer, enter customer context and verify the actual storefront experience.

Common problems

The Create Customer action is missing

Check the global enable setting, the Staff account's **Can Create Customer** permission and the active website/store scope.

A customer group is missing

Review **Restrict customer groups**. The Staff form deliberately excludes groups outside the configured allowlist.

Magento reports a duplicate email

Search the customer list on the same website. Assign the existing customer to Staff rather than creating a second account.

The customer did not receive an email

Check the activated-template allowlist, the customer-password template, Magento mail transport and logs. Saving a customer successfully does not prove the email was delivered.

Staff created the customer but cannot see it

Confirm the resulting Staff-customer relation, the website and customer-group restrictions. Do not solve this by enabling **Access All Customers** unless that broad access is intended.

Related: Customer Assignment, Email Configuration and Customer Impersonation.