Work in Customer Context

Sales Staff Documentation

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

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EXTENSION
Magento 2 Extension Sales Staff

Work in Customer Context

Sales Staff can enter the storefront as an assigned customer without knowing the customer's password. This lets a representative view the catalog and pricing available to that customer, prepare the cart and place an order in the customer's account.

The action is customer impersonation, even though the UI describes it as logging in to the customer account. Use it only for a documented service or sales purpose.

Access boundary

A representative can enter customer context only when:

- the Staff session is authenticated
- the customer is assigned to that Staff account, or **Access All Customers** is enabled
- the customer belongs to the Staff account's website

The action is a POST request protected by Magento's form key. Manually changing a customer ID in the request does not grant access.

Start a customer session

1. Sign in through the Staff storefront.
2. Open **My Customers**.
3. Find the assigned customer.
4. Choose **Login to this account**.
5. Confirm the success message names the intended customer.

The extension clears an unrelated guest cart before loading the customer's active cart. It also resets stale order-edit context so a previous task is not carried into the next customer.

Before changing prices or placing an order, read the customer name, website, company and cart contents. This small check prevents work being performed in the wrong account when representatives switch frequently.

What Staff sees

Once customer context is active, Magento uses the customer's group, catalog, prices, cart and checkout rules. Compatible SoftwareSilo pricing or catalog extensions continue to apply through their normal customer context.

Staff permissions add capabilities such as item-price editing or order editing; they do not remove the customer's website boundary. Shipping, payment, tax, stock and minimum-quantity rules remain active unless the relevant Staff order setting explicitly bypasses them.

Leave customer context

Use **My Staff Account** or the Staff action for leaving the customer account. The extension resets the customer session, clears the checkout quote and order-edit markers, invalidates private browser content and returns to the Staff area.

Do not simply close the tab on a shared device. Exit customer context and then sign out of Staff when work is finished.

Operational safeguards

- Give **Access All Customers** only to roles that need it.
- Keep item-price editing disabled for representatives who do not negotiate prices.
- Explain to buyers when a representative will place an order in their account.
- Use order comments or an external approval process when the buyer must authorize the final cart.
- Review Staff attribution and commission on the completed order.
- Train representatives to leave customer context between customers.

Common problems

The login action says access is not allowed

Confirm the assignment, Staff website and customer website. If **Access All Customers** is on, a cross-website customer is still rejected.

The wrong cart appears

Confirm the customer named in the success message. A customer's existing active cart is intentionally loaded; an unrelated guest cart is cleared. Leave customer context before switching customers.

Customer-specific prices do not appear

Check the customer's group and pricing assignments in the same website/store view. Customer context cannot make a missing or inactive pricing rule appear.

The representative cannot edit an item price

Enable **Can Edit Item Price** on the Staff account. Zero-price editing has a separate global setting and is disabled by default.

Returning to Staff leaves stale customer content

Use the provided exit action, then clear private-content/browser cache in a staging reproduction. If it persists, inspect Magento logs and custom theme overrides around customer sections and checkout session handling.

Related: Customer Assignment, Order Management and Customer Creation.