



SOFTWARESILOS

Sales Staff Extension

PDF Manual

MODULE

staff

LAST UPDATED

2026-03-29

Customer Impersonation

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

Learn how sales staff can securely log into customer accounts to place orders and manage customer needs.

Overview

Customer Impersonation allows staff to:

- Log into customer accounts securely
- Place orders on behalf of customers
- Edit cart item prices
- Access customer dashboard
- View order history
- Manage customer addresses

How It Works

Security Model

Separate Sessions:

- Staff session remains active
- Customer session created temporarily
- Staff context maintained throughout
- Easy exit from customer context

Audit Trail:

- Orders tagged with staff ID
- Staff information stored in order
- Commission automatically calculated
- Full traceability

Access Control

Staff Must Have:

- Active staff account
- Customer assigned to staff (or "Access All Customers")
- Permission to impersonate

Customer Requirements:

- Active customer account
- Staff has assignment/access permission to the customer
- Not blocked or suspended

Impersonation Process

Step 1: Login as Staff

Navigate to: <https://yourstore.com/staff/account/login>

Enter credentials:

- Email
- Password

Step 2: Find Customer

Go to **Customers**

Search for customer:

- By name
- By email
- By customer ID
- By external ID

Step 3: Start Customer Context

Use the customer login action (tooltip: **Login to this account**)

What Happens:

1. Staff session saved
2. Customer session created
3. Redirect to customer dashboard
4. Customer-context indicator may be shown (theme-dependent)

Step 4: Perform Actions

As customer, you can:

- Browse products
- Add to cart
- Edit cart (including prices if enabled)
- Proceed to checkout
- Place order
- View order history
- Manage addresses
- Update account information

Step 5: Exit Customer Context

Click **Logout from current customer** (top banner/header)

What Happens:

1. Customer session ended
2. Staff session restored

3. Redirect to staff dashboard
4. Order appears in "My Orders"

Editing Cart Prices

Enable Price Editing

Staff Account Configuration:

- **Can Edit Item Price:** Yes

System Configuration:

- **Allow 0 Price on Item Price Edit:** Yes/No

Edit Price Process

1. Login as customer
2. Add products to cart
3. Go to shopping cart
4. Find **Edit Price** field next to each item
5. Enter new price
6. Click **Update**
7. Proceed to checkout

Price Editing Rules

Allowed:

- Reduce price (discount)
- Increase price (if needed)
- Set to zero (if configured)

Not Allowed:

- Negative prices
- Non-numeric values

Use Cases for Price Editing

Discounts:

- Volume discounts
- Loyalty discounts
- Promotional pricing
- Price matching

Adjustments:

- Custom quotes
- Special agreements
- Contract pricing
- Damaged goods

Free Items:

- Samples
- Replacements
- Promotional items
- Warranty replacements

Pricesystem Integration

Requires: MageB2B_PricesystemCore

Alternative Prices

Configuration:

- **Display additional pricesystem prices:** Yes

Behavior:

- Dropdown shows alternative prices
- Select from:
 - Customer-specific prices
 - Category prices
 - Pricelist prices
 - Product-customer matrix prices

Benefit: Quick price selection without manual entry

Price Selection

1. Login as customer
2. Add product to cart
3. Click **Edit Price** dropdown
4. Select from available prices:
 - Base Price: \$100.00
 - Customer Price: \$95.00
 - Pricelist A: \$90.00
 - Volume Price: \$85.00
5. Price automatically applied

Order Placement

Order Assignment

Automatic:

- Order tagged with staff ID
- Staff group assigned
- Commission calculated
- Order comment added

Order Data:

- Staff assignment information

- Staff group information
- Commission amount

Commission Calculation

Based on Configuration:

- Total excluding tax
- Total including tax
- Product discount

Example:

Field	Value
Order Subtotal	\$500.00
Staff Commission	5%
Commission Amount	\$25.00

Order Confirmation

Customer Receives:

- Order confirmation email
- Standard order details

Staff Receives (if configured):

- Order confirmation copy
- Commission information
- Customer details

Frontend Interface

Staff Indicator

When impersonating, top banner shows:

```
You are logged in as: John Doe
Staff: Sarah Johnson
[Logout from current customer]
```

Available Actions

Customer Dashboard:

- My Orders
- My Addresses
- Account Information
- Wishlist

- Newsletter Subscriptions

Shopping:

- Browse catalog
- Search products
- Add to cart
- Apply coupons
- Checkout

Restrictions:

- Cannot change customer password
- Cannot delete customer account
- Cannot access restricted pages (if configured)

Access Restrictions

Not Allowed Handles

Configuration: Stores > Configuration > MageB2B > Staff > General

- **Not allowed handles:** Define restricted pages

Example:

```
customer_account_edit  
customer_address_delete  
wishlist_index_remove
```

Behavior:

- Staff redirected if accessing restricted page
- Error message displayed
- Logged in audit trail

Use Cases

Restrict:

- Password changes
- Account deletion
- Payment method management
- Sensitive customer data

Session Management

Session Lifetime

Configuration:

- **Session lifetime (seconds):** 900 (default)

Behavior:

- Staff session expires after inactivity
- Customer impersonation ends
- Staff must re-login

Recommendation:

- 3600 (1 hour) for security
- 7200 (2 hours) for convenience

Multiple Impersonations

Scenario: Staff needs to switch between customers

Process:

1. Click **Logout from current customer**
2. Search for new customer
3. Use the customer login action for the new customer
4. Previous customer session ended

Note: Only one customer impersonation at a time

Security Features

Audit Trail

Logged Information:

- Staff ID who placed order
- Timestamp of impersonation
- Customer ID accessed
- Actions performed
- Price changes made

Access: Admin > System > Action Logs (if enabled)

Password Protection

Staff Cannot:

- View customer passwords
- Change customer passwords
- Access password reset tokens

Customer Security Maintained:

- Passwords remain encrypted
- No password exposure
- Secure authentication

IP Tracking

Optional: Track IP addresses

- Staff IP logged
- Customer IP logged
- Detect suspicious activity

Best Practices

For Field Sales

Workflow:

1. Visit customer on-site
2. Login as staff on mobile device
3. Impersonate customer
4. Review products together
5. Add items to cart
6. Apply negotiated pricing
7. Complete order
8. Click **Logout from current customer**

For Phone Sales

Workflow:

1. Customer calls with order
2. Staff searches customer
3. Login as customer
4. Add items per customer request
5. Apply discounts if needed
6. Read order total to customer
7. Complete order
8. Confirm order number

For Customer Service

Workflow:

1. Customer reports issue
2. Staff accesses customer account
3. Review order history
4. Place replacement order
5. Apply discount or free shipping
6. Complete order
7. Document in customer comment

Troubleshooting

Cannot Start Customer Context

Check:

1. Customer is assigned to staff
2. Staff has "Access All Customers" OR customer assigned

3. Customer account is active
4. Access/scope configuration allows the customer context
5. Staff account is active

Price Editing Not Available

Check:

1. Staff account: "Can Edit Item Price" = Yes
2. Configuration: Price editing enabled
3. Product is not virtual/downloadable (if restricted)

Session Expired

Issue: Staff session expires during impersonation

Solution:

1. Staff automatically logged out
2. Customer session ended
3. Staff must re-login
4. Cart may be lost (depends on configuration)

Prevention: Increase session lifetime

Order Not Assigned to Staff

Check:

1. Staff was logged in during order
2. Customer impersonation was active
3. Order not placed by customer directly
4. Configuration: "Set staff permanently on order"

Advanced Features

Token-Based Login

Requires: Staff Token Service

Use Case: Email links for quick customer access

Process:

1. Generate token for customer
2. Send email with login link
3. Staff clicks link
4. Automatically logged into customer account

API Integration

Requires: MageB2B_StaffAPI

Use Case: Mobile apps, external systems

Endpoints:

- POST /V1/staff/token
- POST /V1/staff/customers/:customerId/token

Next Steps

Learn about commission tracking:

[Commission System →](#)