Staff Groups

Sales Staff Documentation

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

LAST UPDATED
2026-09-26

SOURCE
Open this article online

EXTENSION
Magento 2 Extension Sales Staff

Staff Groups

Staff groups organize representatives into named teams such as Field Sales, Inside Sales or Customer Service. Each Staff account belongs to one group, and the group ID is stored with Staff-attributed orders for reporting.

Groups are labels and reporting dimensions in the base extension. They do not automatically grant a permission bundle. Customer access and operational permissions remain on each Staff account unless an installed add-on explicitly adds group-based behavior.

Create a group

1. Open **Staff > Staff Groups**.
2. Choose **Add New Group**.
3. Enter a short, stable name.
4. Save.
5. Select the group on the relevant Staff accounts.

Set **Default Staff Group** under **Stores > Configuration > MageB2B > Staff > General settings**. It is used when a new Staff record has no explicit group. Configure it at the intended scope before allowing public Staff signup or automated provisioning.

Naming groups

Choose names that reflect how reports and administration are actually divided. `North Region` or `Inside Sales` is easier to maintain than a person's name. Avoid encoding temporary commission percentages or permissions in the label because the group does not enforce them.

If territory and function are separate dimensions in your organization, decide which one belongs in Staff groups and maintain the other through assignments or an external CRM. Creating a group for every combination quickly becomes hard to report on.

Changing a representative's group

Edit the Staff account, select the new group and save. New orders use the representative's current group. Existing orders retain the group stored when they were created, so historical reports remain tied to their original record.

For a reorganization, export or record the membership before making bulk changes and verify a new staging order after the change.

Deleting a group

The Staff table has a group relationship. Reassign Staff accounts before deleting a group, and confirm the default configuration does not still refer to it. Historical order rows store

their group ID independently; deleting a current group does not make old reporting semantics self-explanatory, so retain an external record of renamed or retired teams.

Admin permissions

Magento Admin ACL separates:

- viewing Staff groups
- saving Staff groups
- deleting Staff groups

An administrator who only reviews sales reports does not need group-edit permission.

Common problems

- **New Staff has the wrong group:** check the default at the active website/store scope and any import, API or SAML mapping.
- **A group is missing from the form:** verify it still exists and refresh Magento cache after configuration changes.
- **Reports show an old group:** historical orders retain the group stored at order creation; this is expected.
- **Changing the group did not change permissions:** base Staff groups do not act as permission roles. Edit the Staff account fields or the relevant add-on's settings.

Related: Create Your First Staff Account, Customer Assignment and SAML Single Sign-On.