



**SOFTWARESILOS**

# **Sales Staff Extension**

PDF Manual

MODULE

**staff**

LAST UPDATED

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# Configuration

*Sales Staff Extension · /staff/getting-started/configuration*

This guide covers the most-used configuration options for the Sales Staff extension.

## Configuration Location

Navigate to: **Stores > Configuration > MageB2B > Staff**

## General Settings

### Session Management

#### Session Lifetime (seconds)

- Default: 900 (15 minutes)
- Range: 60 - 31536000 (1 year)
- Controls how long staff sessions remain active

**Recommendation:** Set to 3600-7200 if you want longer staff sessions.

### Customer Assignment

#### Can customer have multiple staff

- Yes: Customers can be assigned to multiple staff members
- No: One customer = one staff member

**Use Case:** Enable for team-based sales, disable for territory management.

#### Enable search customers by staff for frontend

- Adds Staff Firstname/Lastname/Email/Phone filters to the staff customer grid
- Note: Hidden when "Can customer have multiple staff" is enabled

## Frontend Links

#### Add footer link for staff signup

- Adds registration link to store footer
- Enable if you want public staff registration
- Note: staff signup creates an account that must be activated by an admin before the staff user can log in.

#### Add footer link for staff login

- Adds login link to store footer
- Recommended: Yes

#### Privacy Policy Page

- Select CMS page for privacy policy link on signup form
- Required for GDPR compliance

## Customer Management

### List customers in frontend

- Staff can see complete list of assigned customers
- Recommended: Yes

### Activate check and staff in frontend

- Staff can check and add customers from frontend
- Useful for field sales

### Show customers by default inside my customers section

- If disabled, list only shows after search
- Recommended: Yes for small customer bases, No for large

## Login & Redirect

### Login post url handle

- Example: `staff/mypage`
- Redirect URL after staff login
- Default: Staff dashboard

## Permissions

### Can staff delete his own customers?

- Only removes staff-customer relationship, not customer account
- Recommended: No (enable only if staff should manage their assignments)

### Can customer reassign own account to another Sales Staff?

- Allows customers to choose their sales representative
- Use case: Customer preference, territory changes

## Password Security

### Reset link expiration period (hours)

- Default: 2 hours
- Minimum: 1 hour
- How long password reset links remain valid

### Minimum Password Length

- Default: 8 characters
- Minimum: 1
- Enforce strong passwords

## Display Options

### Show comments in my customers list

- Display customer notes in grid

- Useful for quick reference

### **Display staff in customer dashboard**

- Show staff information in customer account
- Builds customer-staff relationship

### **Display primary staff account only**

- Only show primary staff (if multiple assigned)
- Cleaner customer interface

### **Default staff image**

- Upload default profile image for staff without photos
- Recommended: Professional placeholder image

## **Advanced Filters**

### **Enable External Customer ID on customer grid**

- Add custom customer ID field to filters
- Use case: ERP integration, legacy system IDs

### **External Customer ID attribute code**

- Specify customer attribute code
- Example: `erp_customer_id`

### **Search filters for customer grid**

- Configure which filters appear in customer grid
- Drag to reorder, enable/disable filters

### **Filter default billing address only**

- Only filter by default billing addresses
- Improves performance for large customer bases

### **Filter default shipping address only**

- Only filter by default shipping addresses
- Improves performance

### **Enable limiter on Customer Grid**

- Allow staff to change records per page
- Options: 10, 20, 50, 100, 250, All

## **Staff Groups**

### **Default Staff Group**

- Automatically assigned to new staff members
- Create groups first: Staff > Staff Groups

## Access Control

### Restrict customer groups

- Limit which customer groups staff can manage
- Use case: Separate B2B and B2C management

### Not allowed handles

- Block staff from accessing specific pages
- Example: customer\_account\_login
- Security feature

## Order Settings

### Set staff permanently on order

- Assign customer's primary staff to all orders
- Even if different staff places order
- Use case: Commission tracking

### Allow 0 Price on Item Price Edit

- Staff can set item price to zero
- Use case: Free samples, replacements

## Commission Settings

### Commission Type

#### Commission type

- **Total excluding tax:** Calculate on subtotal
- **Total including tax:** Calculate on subtotal including tax
- **Product discount:** Based on discount amount

### Show commission for Staff at my staff account page

- Display commission earnings in staff dashboard
- Recommended: Yes for transparency

## Admin Settings

### Order Grid

#### Add Sales Staff to Order Grid

- Show staff column in admin order grid
- Recommended: Yes

#### Add Reassign feature for Sales Staff to Order Grid

- Mass action to reassign orders to different staff
- Useful for territory changes, staff departures

# Customer Registration Settings

## Frontend Customer Creation

### Enable creating new customer

- Staff can create customer accounts from frontend
- Essential for field sales

### Show customer group field on customer registration

- Allow staff to select customer group
- Use case: B2B vs B2C classification

### Show address fields on customer registration

- Include address form in customer creation
- Recommended: Yes

### Show vat field

- Display VAT number field
- Required for EU B2B

### Can Staff set password for customer

- Staff can set initial password
- Alternative: Customer receives email invitation

## Email Settings

### Email Templates

#### Activated Emails

- Select which email templates are active
- Disable unused notifications

#### Apply following settings to

- Choose which order email templates to customize
- Example: New Order, Order Confirmation

#### Email order to

- **None:** No order email will be sent
- **Customer (Receiver) and Staff (Receiver)**
- **Customer (Receiver)**
- **Customer (Receiver) and Staff (BCC)**
- **Staff (Receiver)**

#### Sent email copy to staff when customer is placing an order

- Staff receives copy when customer orders directly
- Requires "Set staff permanently on order" enabled

## Email Templates Configuration

### Email template new staff

- Template: Staff New Account
- Sent when staff account is created

### Email template password for customer created by staff

- Template: Customer Password Set by Staff
- Sent when staff creates customer with password

### Email template for staff activation

- Template: Staff Activated
- Sent when admin activates staff account

### Email template for staff de-activation

- Template: Staff Deactivated
- Sent when admin deactivates staff account

### Email template for staff forgot password

- Template: Staff Forgot Password
- Password reset email

### Email template for staff password updated

- Template: Staff Password Updated
- Confirmation after password change

## Email Recipients

### CC Receiver for staff emails

- Comma-separated email addresses
- Example: manager@example.com,sales@example.com

### BCC Receiver for staff emails

- Hidden copy recipients
- Use for compliance, monitoring

### Send order email from fixed Store View

- Always send from specific store view
- Use case: Multi-store with centralized sales

### Staff name and email details

- Template for staff information in emails
- Variables: {{firstname}}, {{lastname}}, {{email}}, {{phone}}
- Add {{var order\_staff\_name\_email\_detail}} to order templates

# Pricesystem Settings

## Display additional pricesystem prices

- Show alternative prices from Pricesystem extension
- Requires: MageB2B\_PricesystemCore
- Staff can select from dropdown when editing cart prices

## Configuration Best Practices

### For Small Teams (1-10 staff)

- Session Lifetime: 7200 (2 hours)
- Multiple staff per customer: No
- Show customers by default: Yes
- Commission type: Total excluding tax
- Email order to: Both

### For Large Teams (10+ staff)

- Session Lifetime: 3600 (1 hour)
- Multiple staff per customer: Yes
- Show customers by default: No
- Enable limiter: Yes
- Restrict customer groups: Yes
- Commission type: Total excluding tax

### For Field Sales

- Enable creating new customer: Yes
- Show address fields: Yes
- Can staff set password: Yes
- Login redirect: staff/customers
- Display staff in customer dashboard: Yes

### For Inside Sales

- Enable creating new customer: Yes
- List customers in frontend: Yes
- Allow 0 price editing: Yes
- Email order to: Staff
- Show commission: Yes

## Testing Configuration

After configuration, test:

1. **Staff Login:** Try logging in as staff

2. **Customer Assignment:** Assign a test customer
3. **Customer Impersonation:** Log into customer account
4. **Order Placement:** Place test order
5. **Commission Calculation:** Verify commission is calculated
6. **Email Delivery:** Check all email templates work

## Next Steps

Configuration complete? Create your first staff account:

[Create Your First Staff Account →](#)