



SOFTWARESILOS

Sales Staff Extension

PDF Manual

MODULE

staff

LAST UPDATED

2026-03-29

Installation

Sales Staff Extension · /staff/getting-started/installation

This guide walks you through installing and setting up the Sales Staff extension for Magento 2.

Prerequisites

Before installing, ensure you have:

- Magento with `magento/framework >=103.0.4`
- PHP ^8.1 with extensions: `intl`, `iconv`
- Composer access to MageB2B repository
- SSH/terminal access to your server
- Backup of your database and files

Installation Steps

1. Install via Composer

```
composer config bearer.repo.softwaresilo.io <token>
composer config repositories.softwaresilo composer
https://repo.softwaresilo.io/
composer require mageb2b/staff:*
```

2. Enable the Module

```
php bin/magento module:enable MageB2B_Staff
```

3. Run Setup Upgrade

```
php bin/magento setup:upgrade
```

This creates the required database tables:

- `customer_salesstaff` - Staff accounts
- `customer_salesstaff_customer` - Staff-customer relationships
- `customer_salesstaff_group` - Staff groups
- Adds columns to `sales_order`, `sales_order_grid`, and `quote`

4. Compile DI

```
php bin/magento setup:di:compile
```

5. Deploy Static Content

```
php bin/magento setup:static-content:deploy
```

6. Clear Cache

```
php bin/magento cache:flush
```

Verify Installation

Check Module Status

```
php bin/magento module:status MageB2B_Staff
```

Expected output:

```
Module is enabled
```

Check Database Tables

```
php bin/magento setup:db:status
```

Expected tables:

- customer_salesstaff
- customer_salesstaff_customer
- customer_salesstaff_group

Access Admin Configuration

Navigate to:

```
Stores > Configuration > MageB2B > Staff
```

If you see the configuration page, installation was successful!

Post-Installation Setup

1. Create Default Staff Group

Go to: **Staff > Staff Groups**

Click "Add New Group" and create:

- Name: "Sales Representatives"
- Save

2. Configure Basic Settings

Go to: **Stores > Configuration > MageB2B > Staff > General**

Set:

- **Session Lifetime:** Default is 900 seconds (adjust as needed)
- **Can customer have multiple staff:** Depends on your process (team-based vs. territory-based)
- **Default Staff Group:** Sales Representatives

3. Configure Email Settings

Go to: **Stores > Configuration > MageB2B > Staff > Email**

Set:

- **Email template new staff:** Staff New Account
- **Email template for staff activation:** Staff Activated
- **Email template for staff de-activation:** Staff Deactivated

4. Enable Frontend Links (Optional)

Go to: **Stores > Configuration > MageB2B > Staff > General**

Set:

- **Add footer link for staff signup:** Yes
- **Add footer link for staff login:** Yes

This adds links to your store footer for staff registration and login.

Optional Add-Ons

Install optional add-ons for extended functionality: Reporting is included directly in the Staff core feature set.

Staff API

```
composer config bearer.repo.softwaresilo.io <token>
composer config repositories.softwaresilo composer
https://repo.softwaresilo.io/
composer require mageb2b/staff-api:*
php bin/magento module:enable MageB2B_StaffApi
php bin/magento setup:upgrade
php bin/magento cache:flush
```

Customer History

```
composer config bearer.repo.softwaresilo.io <token>
composer config repositories.softwaresilo composer
https://repo.softwaresilo.io/
composer require mageb2b/staff-customerhistory:*
php bin/magento module:enable MageB2B_StaffCustomerHistory
php bin/magento setup:upgrade
php bin/magento cache:flush
```

Customer Visits

```
composer config bearer.repo.softwaresilo.io <token>
composer config repositories.softwaresilo composer
https://repo.softwaresilo.io/
composer require mageb2b/staff-customervisit:*
php bin/magento module:enable MageB2B_StaffCustomerVisit
php bin/magento setup:upgrade
php bin/magento cache:flush
```

Order Management (Order Editing)

```
composer config bearer.repo.softwaresilo.io <token>
composer config repositories.softwaresilo composer
https://repo.softwaresilo.io/
composer require mageb2b/staff-ordermanagement:*
php bin/magento module:enable MageB2B_StaffOrderManagement
php bin/magento setup:upgrade
php bin/magento cache:flush
```

Quotes

```
composer config bearer.repo.softwaresilo.io <token>
composer config repositories.softwaresilo composer
https://repo.softwaresilo.io/
composer require mageb2b/staff-quote:*
php bin/magento module:enable MageB2B_StaffQuote
php bin/magento setup:upgrade
php bin/magento cache:flush
```

Import/Export

```
composer config bearer.repo.softwaresilo.io <token>
composer config repositories.softwaresilo composer
https://repo.softwaresilo.io/
composer require mageb2b/staff-importexport:*
php bin/magento module:enable MageB2B_StaffImportExport
php bin/magento setup:upgrade
php bin/magento cache:flush
```

Hyvä Compatibility

```
composer config bearer.repo.softwaresilo.io <token>
composer config repositories.softwaresilo composer
https://repo.softwaresilo.io/
composer require mageb2b/staff-hyva:*
php bin/magento module:enable MageB2B_StaffHyva
php bin/magento setup:upgrade
```

```
php bin/magento cache:flush
```

SAML Single Sign-On (SSO)

```
composer config bearer.repo.softwaresilo.io <token>
composer config repositories.softwaresilo composer
https://repo.softwaresilo.io/
composer require mageb2b/staff-saml:*
php bin/magento module:enable MageB2B_StaffSaml
php bin/magento setup:upgrade
php bin/magento cache:flush
```

Sample Data

For staging/dev environments:

Compatibility note: mageb2b/staff-sample-data currently requires PHP ~7.4|~8.0; staff-quote-sample-data depends on it.

```
composer config bearer.repo.softwaresilo.io <token>
composer config repositories.softwaresilo composer
https://repo.softwaresilo.io/
composer require mageb2b/staff-sample-data:*
php bin/magento module:enable MageB2B_StaffSampleData
php bin/magento setup:upgrade
php bin/magento cache:flush
```

If you installed the Staff Quote add-on and want demo quote data:

```
composer config bearer.repo.softwaresilo.io <token>
composer config repositories.softwaresilo composer
https://repo.softwaresilo.io/
composer require mageb2b/staff-quote-sample-data:*
php bin/magento module:enable MageB2B_StaffQuoteSampleData
php bin/magento setup:upgrade
php bin/magento cache:flush
```

Troubleshooting Installation

Module Not Showing in Admin

Problem: Configuration page not visible

Solution:

```
php bin/magento cache:flush
php bin/magento setup:upgrade
```

Database Tables Not Created

Problem: Tables missing after setup:upgrade

Solution:

```
# Check module is enabled
php bin/magento module:status MageB2B_Staff

# Run setup again
php bin/magento setup:upgrade --keep-generated
```

Permission Errors

Problem: Cannot write to directories

Solution:

```
# Set correct permissions
chmod -R 755 var/ pub/static/ generated/
chown -R www-data:www-data var/ pub/static/ generated/
```

Uninstallation

If you need to remove the extension:

```
php bin/magento module:uninstall MageB2B_Staff
```

This will:

- Remove the module code
- Drop `customer_salesstaff` and `customer_salesstaff_customer`
- Remove related staff attributes/entity data

Warning: This permanently deletes all staff accounts and data!

Next Steps

Now that the extension is installed, configure it for your needs:

[Configuration Guide](#) →