Installation and Setup

Sales Staff Documentation

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

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EXTENSION
Magento 2 Extension Sales Staff

Installation and Setup

Install the base Sales Staff package first. Add only the optional packages your workflow needs, and pin versions according to your SoftwareSilo repository access and release policy.

Requirements

The Staff package requires:

- PHP 8.1 or newer within its supported PHP constraint
- Magento 2.4.6 or newer (raised from Magento 2.4 in Staff 1.6.3)
- PHP `intl` and `iconv` extensions
- Composer access to the SoftwareSilo repository
- A Luma- or Breeze-based storefront theme; Hyvä storefronts need the `mageb2b/staff-hyva` package listed below

Take a normal application and database backup before changing modules on an existing store. Test the installation in staging first.

Install the base extension

Use the repository host, repository key and token supplied with your license:

Replace `repo.softwaresilo.io`, `softwaresilo`, `https://repo.softwaresilo.io/` and `<token>` with the repository details shown under **Account > Licenses** in your SoftwareSilo account — see Installation & Updates.

```
composer config bearer.repo.softwaresilo.io <token>
composer config repositories.softwaresilo composer
https://repo.softwaresilo.io/
composer require mageb2b/staff:*
php bin/magento module:enable MageB2B_ExtensionManager
MageB2B_Staff
php bin/magento setup:upgrade
php bin/magento setup:di:compile
php bin/magento setup:static-content:deploy
php bin/magento cache:flush
```

Adjust the static-content deployment command for the locales and deployment strategy used by your store.

The setup creates Staff account, group and customer-assignment tables. It also adds Staff ownership and commission fields to quotes, sales orders and the sales-order grid.

Verify the installation

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

Then sign in to Magento Admin and check:

1. **Staff > All Staff** opens without an error.
2. **Staff > Staff Groups** is available to the admin role.
3. **Stores > Configuration > MageB2B > Staff** shows the extension information and configuration groups.

If the menu is missing for one administrator, check that administrator's role resources before reinstalling anything.

First configuration

1. Create a staff group under **Staff > Staff Groups**.
2. Select it as **Default Staff Group** under **Stores > Configuration > MageB2B > Staff > General settings**.
3. Review the 900-second default session lifetime and the login/signup footer links.
4. Review customer-listing, customer-creation and order-edit permissions before activating an account.
5. Configure and test the Staff emails used by your workflow.
6. Create the first representative using Create Your First Staff Account.

Reports and order management are part of the base extension. Do not look for or install separate `staff-report` or `staff-ordermanagement` packages.

Optional packages

Each optional package uses the same installation pattern:

```
composer require mageb2b/<package>:*
php bin/magento module:enable <Magento_Module_Name>
php bin/magento setup:upgrade
php bin/magento setup:di:compile
php bin/magento cache:flush
```

Workflow	Composer package	Magento module
REST and SOAP integration	`mageb2b/staff-api`	`MageB2B_StaffApi`

Workflow	Composer package	Magento module
Customer timeline and files	`mageb2b/staff-customerhistory`	`MageB2B_StaffCustomerHistory`
Visit scheduling and calendars	`mageb2b/staff-customervisit`	`MageB2B_StaffCustomerVisit`
Staff CSV import/export	`mageb2b/staff-importexport`	`MageB2B_StaffImportExport`
Staff quotation workflow	`mageb2b/staff-quote`	`MageB2B_StaffQuote`
Hyvä templates	`mageb2b/staff-hyva`	`MageB2B_StaffHyva`
Authenticator-based Staff login	`mageb2b/staff-tfa`	`MageB2B_StaffTFA`
SAML sign-in	`mageb2b/staff-saml`	`MageB2B_StaffSaml`

Install `mageb2b/staff-sample-data` and `mageb2b/staff-quote-sample-data` only in development or disposable demo environments.

Staff TFA and Staff SAML are alternative login packages and cannot be installed together. The TFA package declares a Composer conflict with SAML. Choose the authentication method before adding either package.

The GraphQL package requires the Staff base extension. See the GraphQL add-on article for the exposed queries and mutations.

Updating or removing Staff

Before updating, record installed versions and review their changelogs:

```
composer show mageb2b/staff mageb2b/staff-\*
```

Use Composer to update an explicitly selected package, then run Magento's setup, compilation and cache commands. Re-test sign-in, customer access, order creation, emails and every installed add-on in staging.

Removing the package is a data-impacting operation because module uninstall routines may remove module-owned tables or attributes. Export anything you need to retain and confirm the exact Composer and Magento uninstall plan with SoftwareSilo support before running it on a live store.

If setup fails

- A Composer authentication error usually means the repository host or token is wrong.
- A dependency-resolution error means the selected package versions cannot coexist; do not use `--with-all-dependencies` blindly.
- A missing Admin menu is often an ACL or cache issue.

- A storefront 404 after installation can require static-content deployment and cache cleaning.

Continue with Configuration once the Admin pages are accessible.