



SOFTWARESILOS

Sales Staff Extension

PDF Manual

MODULE

staff

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Getting Started

Sales Staff Extension · /staff/getting-started

Welcome to the Sales Staff extension documentation. This comprehensive B2B solution enables dedicated sales representative accounts that can manage customers, place orders on their behalf, and earn commissions.

Quick Links

Getting Started

- [Installation & Setup](#)
- [Configuration](#)
- [Create Your First Staff Account](#)

Core Features

- [Customer Assignment](#)
- [Customer Impersonation](#)
- [Commission System](#)
- [Frontend Customer Creation](#)
- [Staff Groups](#)
- [Order Management](#)
- [Reports & Analytics](#)

Add-Ons

- [API Integration](#)
- [Customer History](#)
- [Customer Visits](#)
- [GraphQL Integration](#)
- [Order Management](#)
- [Quote Management](#)
- [Quote Sample Data](#)
- [Two-Factor Authentication \(if add-on installed\)](#)
- [Import/Export](#)
- [Hyvä Compatibility](#)
- [SAML Single Sign-On](#)
- [Sample Data](#)

Use Cases

- [Field Sales Teams](#)
- [Inside Sales Operations](#)
- [Territory Management](#)
- [Customer Service](#)

Troubleshooting

- [Common Issues](#)
- [Email Configuration](#)

Overview

The Sales Staff extension transforms your Magento store into a powerful B2B platform by enabling dedicated sales representative accounts. Sales staff can manage their customer portfolio, place orders on behalf of customers, and earn commissions - all through a separate frontend login system.

Core Concept

Separate Login System

Staff members have their own authentication system, completely separate from:

- Magento Admin (backend)
- Customer accounts (frontend)

This provides:

- **Security:** Staff credentials are isolated
- **Flexibility:** Different permissions and access levels
- **Scalability:** Unlimited staff accounts without admin licenses

Customer-Staff Relationship

The extension supports flexible customer assignment:

One-to-One: Each customer has one primary sales representative **Many-to-Many:** Customers can be assigned to multiple staff members **Access All:** Senior staff can access all customers

Commission-Based Compensation

Automatic commission calculation based on:

- Order totals (including or excluding tax)
- Product discounts
- Configurable percentages per staff member

Key Benefits

For Sales Teams

- Mobile-friendly frontend interface
- Quick customer search and access
- Order placement on behalf of customers
- Real-time commission tracking
- Customer notes and history

For Management

- Territory-based organization
- Performance tracking per staff/group
- Commission reports and analytics
- Customer assignment management
- Order filtering by staff

For Customers

- Dedicated sales representative
- Personalized service
- Quick order processing
- Custom pricing support

System Requirements

- Magento 2.4.6 - 2.4.8
- PHP 8.1 - 8.5

Add-Ons Available

Extend functionality with these powerful add-ons:

Core Add-Ons

- **Staff API:** Web API endpoints for integrations
- **Customer History:** Topic-based customer timeline with attachments
- **GraphQL Integration:** GraphQL support for headless/storefront integrations

Advanced Add-Ons

- **Order Management:** Staff order editing workflows with config controls
- **Quote Management:** Staff quote workflows with PDFs, reminders, attachments
- **Quote Sample Data:** Demo quote records for staging/testing
- **Two-Factor Authentication:** Enhanced security with 2FA (requires separate add-on installation)

Integration Add-Ons

- **Customer Visit:** Visit planning and calendar integration
- **Import/Export:** CSV export from admin grid + CLI import
- **Hyvä Compatibility:** Compatibility for Hyvä storefronts
- **SAML SSO:** Single sign-on for staff accounts
- **Sample Data:** Demo data for staff and quote workflows

Getting Help

If you get stuck, start here:

- Check [Common Issues](#)
- Verify your configuration in [Configuration](#)
- If you need support, open a ticket on the main site (Support is tied to your license/support status).

Next Steps

Ready to get started? Follow our installation guide:

[Installation & Setup →](#)