



SOFTWARESILOS

Sales Staff Extension

PDF Manual

MODULE

staff

LAST UPDATED

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Customer Service Use Case

Sales Staff Extension · /staff/use-cases/customer-service

How customer service teams can use the Staff extension to help customers place orders, fix cart issues, and answer account-related questions without giving out customer passwords.

Scenario

- Team: Customer service agents
- Goal: Resolve issues quickly while keeping a clean audit trail (who did what, for which customer)

Typical Workflow

1. Identify The Customer

Use **Customers** (assigned customers) or **Search** (depending on your configuration):

- search by name / email
- search by external customer id (optional configuration)

2. Login As Customer (Impersonation)

1. Open the customer record
2. Use the customer login action (tooltip: **Login to this account**)
3. A customer-context banner may be shown (theme-dependent)
4. After finishing, click **Logout from current customer**

Use cases:

- reproduce checkout problems
- apply a one-time discount by editing cart item price (if enabled)
- place an order for a customer on the phone

3. Document What Happened

Recommended:

- add a short customer comment/note (if enabled)
- reference the order number if you placed an order

Recommended Configuration

- **Access All Customers** for support agents (or assign only support customers)
- **Not allowed handles**: block sensitive pages that support should not access (example: password change)
- **Session lifetime**: increase to avoid logouts during longer calls

Common Pitfalls

- If staff cannot see customers: check customer group restrictions and website assignment.
- If impersonation fails: check assignment/access rights, account status, and active scope

configuration.