Customer Service Team

Sales Staff Documentation

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

LAST UPDATED
2026-09-26

SOURCE
Open this article online

EXTENSION
Magento 2 Extension Sales Staff

Customer Service Team

Customer-service users can work through Staff accounts when they need assigned-customer access and storefront ordering without Magento Admin. Keep their permissions narrower than a sales representative if they do not negotiate prices or earn commission.

Suggested setup

- assign a defined customer portfolio or, for a centralized desk, grant all-customer access only within the correct website
- disable item-price editing unless service agents issue approved replacements or adjustments
- set commission to zero where the team is not compensated on sales
- enable customer creation only if the desk onboards new accounts
- use Customer History for contacts, complaints and files
- use Customer Visits only if the team schedules appointments
- use Staff Quote only if service agents participate in quotation workflows

Service workflow

1. Confirm the customer's identity and locate the assigned account.
2. Read existing history or orders before entering customer context.
3. Perform the requested storefront action and explain any order or account change.
4. Leave customer context.
5. Record the outcome and any follow-up in the appropriate history or ticket system.

Assignment comments are useful for short routing notes, but they are not a full case-management system.

Related: Work in Customer Context, Customer History and Staff Order Management.