Field Sales 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

Field Sales Team

A field representative can use the Staff storefront on a laptop or tablet to find assigned accounts, create a new customer, enter customer context and place an order during a visit. The representative does not need Magento Admin access.

Suggested setup

- Assign named customers rather than using **Access All Customers**.
- Enable customer creation only for representatives who onboard accounts.
- Show address and VAT fields when the representative collects them in person.
- Enable item-price editing only when field negotiation is part of policy.
- Keep zero-price items and order-rule bypasses disabled unless a documented process needs them.
- Use Customer Visits when appointments, outcomes and follow-ups must be recorded.
- Use Customer History for call notes, meeting summaries and attachments.

Day-to-day flow

1. The representative signs in before or at the customer site.
2. They open the assigned customer and verify the company identity.
3. They review previous context, create a visit/history entry where installed, and enter customer context.
4. They prepare the cart using the customer's catalog and prices.
5. The customer confirms the commercial details through the business's normal approval process.
6. Staff places the order and leaves customer context.
7. The representative records the outcome and next action.

Controls worth testing

Test mobile navigation, session expiry, slow connections and leaving customer context. Representatives should know what happens if the browser closes mid-cart or an order submission times out.

If commission is used, decide whether the visiting representative or the customer's primary representative owns the sale. **Set staff permanently on order** changes that interpretation.

Related: Customer Visits, Work in Customer Context and Commission System.