Inside Sales

Sales Staff Documentation

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

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EXTENSION
Magento 2 Extension Sales Staff

Inside Sales

Inside-sales representatives can handle phone and email orders from a controlled storefront workspace. They search their portfolio, enter the customer's account, build the cart and place the order without receiving Magento Admin permissions.

Suggested setup

- Use assigned portfolios for account ownership, or **Access All Customers** only for a centralized team that truly handles every account.
- Keep the customer list hidden until search for very large portfolios.
- Configure useful search fields such as external customer ID and billing postcode.
- Allow customer creation for authorized onboarding staff.
- Allow item-price editing only for representatives who can negotiate.
- Route order emails to the customer and, if required, copy Staff according to the email policy.
- Enable reports for representatives who need to review their own order/product activity.

Call workflow

1. Search by email, company identifier or address and read the company back to the caller.
2. Enter customer context and review the existing cart before adding anything.
3. Confirm SKU, quantity, price, delivery address and payment method.
4. Place the order, note the Magento order number and leave customer context.
5. Record any non-order follow-up in Customer History instead of an assignment comment.

For revised offers rather than immediate orders, use Staff Quote Management.

Avoid common shortcuts

Do not give all-customer access merely because search is slow, and do not send customer passwords to representatives. If a caller needs account access, use Magento's customer password reset flow. If an order needs changes, use the controlled Staff order-edit flow only in allowed states.

Related: Customer Assignment, Staff Order Management and Customer History.