Territory Management

Sales Staff Documentation

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

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EXTENSION
Magento 2 Extension Sales Staff

Territory Management

Sales Staff can model territory ownership through customer assignments and Staff groups. It does not calculate geographic territories automatically; an administrator, import or integration must maintain the assignments.

A workable model

Use Staff groups for the stable reporting dimension, such as North, South or Key Accounts. Assign each customer to the responsible representative and keep **Can customer have multiple staff** disabled when ownership must be exclusive.

If an account manager and backup representative both need access, enable multiple assignment and document which relation is primary. Decide whether primary ownership should also be written to customer orders through **Set staff permanently on order**.

Territory handover

1. Export or record the affected assignments.
2. Add the new representative or bulk-update the relations.
3. Verify access to representative customer samples in each website.
4. Update primary ownership where required.
5. Review open quotes, visits and customer-history responsibilities.
6. Remove old assignments and deactivate departed Staff accounts.
7. Place a staging order and verify group, Staff and commission attribution.

Historical orders retain the Staff and group stored when they were created. A territory change should not rewrite prior-period reporting.

Integration options

Use the Import/Export add-on for controlled CSV batches or the Staff API for an ERP/CRM-owned assignment process. Validate website IDs and customer identifiers before applying a feed; a syntactically valid assignment can still give the wrong representative access to a customer.

Related: Customer Assignment, Staff Groups and REST and SOAP API.