Sales Staff

Sales Staff Documentation

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

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EXTENSION
Magento 2 Extension Sales Staff

Sales Staff

SoftwareSilo Sales Staff gives sales representatives their own Magento storefront workspace. A staff user can work with assigned customers, place or edit eligible orders in customer context, and review sales and commission data without receiving Magento Admin access.

The base extension includes staff accounts, groups, customer assignments, customer impersonation, customer creation, order management, commissions and reports. Customer history, visit planning, quotes, TFA, SAML and bulk import/export are separate packages.

Start here

- Install Sales Staff
- Configure the extension
- Create the first staff account

How the account model works

Staff accounts are separate from Magento Admin users and customer accounts. They sign in through the storefront, but their access is limited by the Staff record and its assigned customers.

A representative can be given access to every customer or only to selected customers. If **Can customer have multiple staff** is enabled, the same customer may be assigned to more than one representative. Removing an assignment does not delete the Magento customer.

Staff groups organize representatives for administration and reporting. They do not replace each staff account's operational permissions, such as customer creation, item-price editing or order editing.

Base features

- Customer assignment: control which customers each representative can access.
- Customer impersonation: enter an assigned customer's storefront session to assist with shopping and ordering.
- Customer creation: let authorized representatives register new Magento customers.
- Order management: place orders in customer context and edit orders in configured states.
- Commissions: store the responsible representative, group and calculated commission on orders.
- Reports: built-in order and product reporting for staff activity. Reports are not a separate add-on.

- Staff groups: organize representatives and set the default group for new accounts.

Optional packages

- REST and SOAP API
- Customer history
- Customer visits and calendar integration
- Import and export
- Quote management
- Hyvä compatibility
- Two-factor authentication
- SAML single sign-on
- GraphQL API: headless staff queries, staff tokens and customer impersonation tokens (requires the Staff extension).

Sample-data packages are intended for development and demonstrations, not production:

- Staff sample data
- Staff Quote sample data

Choose the relevant workflow

- Field sales teams
- Inside sales
- Territory management
- Customer service

For a missing menu, blocked customer or order-edit problem, start with Common Issues. Email delivery has a separate Email Configuration guide.