



SOFTWARESILOS

Sales Staff Extension

PDF Manual

MODULE

staff

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Overview

Sales Staff Extension · /staff

Welcome to the Sales Staff extension documentation. This comprehensive B2B solution enables dedicated sales representative accounts that can manage customers, place orders on their behalf, and earn commissions.

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Overview

The Sales Staff extension transforms your Magento store into a powerful B2B platform by enabling dedicated sales representative accounts. Sales staff can manage their customer portfolio, place orders on behalf of customers, and earn commissions - all through a separate frontend login system.

Core Concept

Separate Login System

Staff members have their own authentication system, completely separate from:

- Magento Admin (backend)
- Customer accounts (frontend)

This provides:

- **Security:** Staff credentials are isolated
- **Flexibility:** Different permissions and access levels
- **Scalability:** Unlimited staff accounts without admin licenses

Customer-Staff Relationship

The extension supports flexible customer assignment:

One-to-One: Each customer has one primary sales representative **Many-to-Many:** Customers can be assigned to multiple staff members **Access All:** Senior staff can access all customers

Commission-Based Compensation

Automatic commission calculation based on:

- Order totals (including or excluding tax)
- Product discounts
- Configurable percentages per staff member

Key Benefits

For Sales Teams

- Mobile-friendly frontend interface
- Quick customer search and access
- Order placement on behalf of customers
- Real-time commission tracking
- Customer notes and history

For Management

- Territory-based organization
- Performance tracking per staff/group
- Commission reports and analytics
- Customer assignment management
- Order filtering by staff

For Customers

- Dedicated sales representative
- Personalized service
- Quick order processing
- Custom pricing support

System Requirements

- Magento 2.4.6 - 2.4.8
- PHP 8.1 - 8.5

Add-Ons Available

Extend functionality with these powerful add-ons:

Core Add-Ons

- **Staff API:** Web API endpoints for integrations
- **Customer History:** Topic-based customer timeline with attachments
- **GraphQL Integration:** GraphQL support for headless/storefront integrations

Advanced Add-Ons

- **Order Management:** Staff order editing workflows with config controls
- **Quote Management:** Staff quote workflows with PDFs, reminders, attachments
- **Quote Sample Data:** Demo quote records for staging/testing
- **Two-Factor Authentication:** Enhanced security with 2FA (requires separate add-on installation)

Integration Add-Ons

- **Customer Visit:** Visit planning and calendar integration
- **Import/Export:** CSV export from admin grid + CLI import
- **Hyvä Compatibility:** Compatibility for Hyvä storefronts
- **SAML SSO:** Single sign-on for staff accounts
- **Sample Data:** Demo data for staff and quote workflows

Getting Help

If you get stuck, start here:

- Check [Common Issues](#)
- Verify your configuration in [Configuration](#)
- If you need support, open a ticket on the main site (Support is tied to your license/support status).

Next Steps

Ready to get started? Follow our installation guide:

[Installation & Setup →](#)