Roles, Permissions and Groups

Sublogin Documentation

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

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Magento 2 Extension Sublogin

Roles, Permissions and Groups

`mageb2b/sublogin-role` adds reusable storefront roles and a group hierarchy. Use roles to define what a buyer may do. Use groups to represent reporting or approval relationships inside the company.

The base Sublogin package works without this add-on. Install Role only when buyers need different storefront permissions or an approval hierarchy.

Install and enable

```
composer require mageb2b/sublogin-role
php bin/magento module:enable MageB2B_SubloginRole
php bin/magento setup:upgrade
```

Open **Stores > Configuration > MageB2B > Sublogin > Role settings** and confirm **Is Active** is enabled for the intended scope.

Roles and groups solve different problems

Object	Purpose	Example
Role	Reusable set of allowed storefront actions	Buyer, Approver, Catalog Viewer
Group	Position in a parent-child company hierarchy	Operations > Procurement

A sublogin can be assigned to a role and a group. A group can have a parent group, which gives Order Approval a route through the organization when its group mode is enabled.

Built-in permission areas

The Role package contributes permissions for:

- product list, product details and product prices;
- adding products to cart, viewing cart and applying coupons;
- opening checkout, viewing totals and placing an order;
- viewing the wishlist;
- viewing orders and invoices;
- listing, saving and deleting Sublogin roles;
- listing, saving and deleting Sublogin groups.

The base package and installed add-ons contribute additional permissions to the same tree, such as Sublogin management, reports, Custom Catalog and order actions. The

number is therefore installation-dependent. It should not be described as a fixed “30+” feature.

Create a buyer role

1. Sign in as the main customer account.
2. Open **My Sublogin Roles**.
3. Create a role named for the job, such as `Procurement Buyer`.
4. Grant product-list, product-detail and price access as needed.
5. Grant cart and checkout permissions as a coherent set.
6. Save the role and assign it to one staging sublogin.
7. Sign in as that buyer and test navigation, direct URLs and actions.



For a buyer who may place orders, grant **View Checkout** as well as **Place Order**. A permission to perform the final action is not useful if the buyer cannot reach the checkout screen.

Create a group hierarchy

1. Open **My Sublogin Groups**.
2. Create the top-level business group.
3. Add child groups only where a real reporting or approval relationship exists.
4. Assign each sublogin to the appropriate group.
5. Review parent relationships before enabling hierarchical approval.

Keep the hierarchy shallow. A chart copied from HR often contains levels that add no value to purchasing and make approval routing difficult to explain.

Templates and default assignments

An administrator can mark a role or group **Is Template** on its Admin form. Templates are global: they have no customer owner, and every new Magento customer is provisioned with a copy of each template role and group when the customer is created. The **Copy as Template** button on an existing role drafts a template from that role's permissions; template names must be unique. Storefront save actions ignore a posted `is_template` value, so templates stay admin-managed.

Each customer account can also flag one role and one group as the default for new subaccounts:

- In Admin, use the **Default Role for New Subaccounts** or **Default Group for New Subaccounts** checkbox on the role or group form.
- In the storefront, the main account gets the same choice as a Yes/No select on the role and group edit forms, including the forms shipped by the Hyvä package.

The default is stored per customer account, or per template scope for template records, and applies to sublogins created afterwards. Choosing a new default replaces the previous one for that account. Explicit assignments and existing sublogins are not changed.

Permission behavior

Permissions are enforced in storefront actions and, for supported resources, product collections and views. Test both visible navigation and direct URLs. Hiding a link alone is not an authorization check.

Some permissions are marked as group permissions. They can participate in group-aware behavior, including order and invoice visibility or approval actions, depending on the installed modules.

Role and Order Approval

Order Approval does not require Role. Without Role, an order that needs approval goes to the main customer.

With both packages installed, **Final Approve/Decline order when all group approved an order** can enable a group path:

1. the order enters the configured pre-approval state;
2. eligible users in parent groups approve it in sequence;
3. the main account makes the final decision after group approval completes.

This hierarchy is based on groups, not on configurable amount tiers. The per-sublogin subtotal threshold only decides whether approval is required.

Safe role design

Start with the smallest useful roles:

- **Catalog Viewer:** products and prices, no cart or checkout;
- **Buyer:** products, prices, cart and checkout;
- **Approver:** order visibility plus approve or decline permissions when Order Approval is installed;
- **Account Coordinator:** selected role, group or sublogin management permissions.

These are examples, not roles created automatically by the package.

Avoid one-off roles for every person. Reusable roles make support and offboarding easier.

Bulk actions

The Admin menus **Sublogin > Sublogin Role** and **Sublogin > Sublogin Group** list roles and groups across all customers, with a **Template** column marking global records. Besides delete, their mass actions can copy a role's permissions or a group definition to every customer account — useful for rolling out a reviewed role to an existing customer base.

On the storefront, **My Sublogin Roles** offers a **Copy Selected** mass action that duplicates the chosen roles together with their permissions. **My Sublogins** gains **Assign Role** and **Assign Group** mass actions for reassigning selected sublogins. A sublogin's assigned role can be inspected through the storefront permission view, which returns that sublogin's effective permission tree.

Changes and troubleshooting

After changing a role:

1. save the role;
2. start a fresh sublogin session;
3. test the affected direct route as well as navigation;
4. check whether another add-on adds its own permission;
5. verify the role is assigned to the expected sublogin.

If every buyer loses access, confirm Role is active and a valid default or assigned role exists. If only one feature is missing, inspect that feature's contributed ACL permission.

Hyvä storefront

Install `mageb2b/sublogin-role-hyva` in addition to the base Sublogin Hyvä bridge. See Hyvä Compatibility Packages.

Related: Order Approval, Sublogin Custom Catalog, and Permission Problems.