Multi-Account Management

Sublogin Documentation

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

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Multi-Account Management

The main customer account can maintain separate buyers without creating a separate Magento customer for each employee. Each sublogin gets its own credentials and identity while staying attached to the company account.

What the base package controls

For each sublogin, the available base fields can include:

- first and last name;
- unique email and password setup;
- store context;
- active and expiry state;
- email and newsletter preferences;
- permission to manage other sublogins;
- selected parent addresses;
- allowed payment and shipping methods.

Installed add-ons contribute their own fields, such as role, group, budget, approval threshold or catalog assignment.

Delegate account management carefully

The main account can allow a sublogin to create and manage other sublogins. The global **Default Value Can Create Sublogins** is off, which is a sensible default for ordinary buyers.

When delegated management is needed:

1. grant it to a small number of named team leads;
2. decide which frontend mass actions they may use;
3. test whether add-on fields are visible and editable as intended;
4. keep account activation and deletion aligned with your offboarding process.

Per-customer settings in Admin

The Admin customer edit form contains a **Sublogin** tab with a **Sublogin Configuration** fieldset. These account-level values apply to the parent customer rather than a single sublogin:

Field	What it changes
Max Number of Sublogins	Caps how many sublogins the account may have. `0` means unlimited. The limit is enforced server-side when a sublogin is created.

Field	What it changes
Sublogin Optional Email	Additional customer email address usable by the configured optional-email templates.
Manage Sublogins	Whether the customer may create and manage sublogins at all.

Installed add-ons extend the same fieldset: Role adds **Manage Roles & Permissions**, Budget adds **Manage Budgets**.

These customer attributes are admin-managed. Customer-side API writes that try to set them through `custom_attributes` are rejected — see Protected Customer Attributes.

Manage records in Admin

Sublogin > All Sublogins lists sublogins across customers. Its mass actions are **Delete**, **Activate**, **Deactivate** and **Unset expire date**; the storefront's newsletter and management mass actions are configured separately under **Massactions in frontend**.

The Admin edit page adds tools a storefront user does not have: a **Reset Password** button that sends a Magento password-reset message, a **Login as Sublogin** button for storefront impersonation (see Login Context and Impersonation), and a **Sublogin Shopping Cart** section listing the sublogin's active cart contents with mass delete for stale entries.

When an administrator creates an order in Admin, the order form includes a **Sublogin** select listing the chosen customer's sublogins, so back-office orders can be attributed to the right buyer. The Admin order view shows the stored sublogin in the customer information area, linked to its edit page.

Base accounts are flat

The base package attaches sublogins directly to the main customer. Hierarchical groups and reusable roles require `mageb2b/sublogin-role`.

A common structure with that add-on is:

```
Main customer account
└── Operations
    ├── Procurement
    └── Warehouse
```

The hierarchy can also support approval routing when Order Approval is installed and group approval is enabled. It does not create arbitrary amount-based approval tiers.

Offboard a buyer

Deactivate access before deleting a record. Historic orders retain the sublogin association and use the configured fallback label if the record is later removed. Check reports, exports and integrations before permanent deletion.

For a person who should become an independent Magento customer, use the reviewed Transform Accounts workflow in staging rather than manually moving identifiers.

Related: Create Your First Sublogin and Roles and Permissions.