



# Create Your First Sublogin

Sublogin Documentation

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

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# Create Your First Sublogin

Create the first sublogin in staging and use it to complete a real buyer journey. One successful record is more useful than importing a full organization before address, checkout and email rules have been tested.

Use a fictional buyer with a normal-looking demo address, for example:

- Name: Elena Fischer
- Company role: Procurement Manager
- Email: `elena.fischer@northstar-industrial.example`

Do not use a real employee or customer record in documentation or training captures.

## Create it from the customer account

1. Sign in as the main customer account.
2. Open **My Sublogins**.
3. Select **Add New Sublogin**.
4. Enter the buyer's name and unique email address.
5. Set an active status or expiry date according to your access policy.
6. Decide whether the person receives Sublogin emails and newsletters.
7. Decide whether they may manage other sublogins. Keep this off for ordinary buyers.
8. Assign addresses and, when the global filters are enabled, allowed payment and shipping methods.
9. Save the record.

The screenshot shows the LUMA customer account interface. At the top, a red banner states "This is a demo store. No orders will be fulfilled." Below this, a grey bar shows "Demo expiry: 2024-06-15 12:00:00 (40 22h left)" and "Welcome, Elena Fischer!". The main navigation bar includes "What's New", "Women", "Men", "Gear", "Training", and "Sale". A search bar is present with the text "Search entire store here...".

The left sidebar contains a menu with the following items: My Account, My Orders, My Downloadable Products, My Wish List, Address Book, Account Information, Stored Payment Methods, **My Sublogins** (highlighted), My Sublogin Orders Report, My Sublogin Products Report, My Sublogin Groups, My Sublogin Roles, My Sublogin Budgets, My Product Reviews, and Newsletter Subscriptions.

The main content area is titled "My Sublogins". It features a "Filter by group" dropdown set to "Show all groups" and a "Filter" button. An "Add New Sublogin" button is in the top right. Below the filter is a table with columns: Name, Email, Active, Role, and Group. The table contains two entries:

| Name          | Email                                      | Active | Role  | Group            |
|---------------|--------------------------------------------|--------|-------|------------------|
| Elena Fischer | elena.fischer@northstar-industrial.example | Yes    | Buyer | Procurement Team |
| Jonas Weber   | jonas.weber@northstar-industrial.example   | Yes    | Buyer | Procurement Team |

Each row has "Edit" and "Delete" links. At the bottom of the table, it says "2 Item(s)" and "Show 10 per page".

Below the table, there are sections for "Compare Products" (stating "You have no items to compare.") and "My Wish List" (stating "You have no items in your wish list.>").

The exact fields depend on installed add-ons. Role, group, budget, catalog and order-

approval controls appear only when their packages are active.

## Set up the password safely

Use the configured account setup or confirmation message so the new user creates their own password. The password must satisfy Magento's configured minimum length and character-class rules.

Keep **Send plain password in sublogin account emails** disabled. If no message arrives:

1. confirm that the email address is correct and unique;
2. check whether the sublogin is configured to receive emails;
3. inspect the Magento mail transport or staging mailbox;
4. send a fresh setup or reset message instead of sharing a password manually.

If email confirmation is required, the account cannot be used until its confirmation flow is complete.

## Create or review it in Magento Admin

Administrators can manage records from **Sublogin > All Sublogins**. This is useful for support, bulk review and add-on fields that a customer may not control.

This is only a demo store. You can browse and place orders, but nothing will be processed.

Sublogin

Demo expiry: 2026-08-15 07:44 UTC (1d 23h left)

Search: northstar

Active filters: Keyword: northstar

2 records found

| ID | Customer Email                          | Sublogin Email                             | Firstname | Lastname | Active | Last Login At | Action | Order Needs Approval | Order Approval Amount Check | Group            | Role  |
|----|-----------------------------------------|--------------------------------------------|-----------|----------|--------|---------------|--------|----------------------|-----------------------------|------------------|-------|
| 39 | purchasing@northstar-industrial.example | jonas.weber@northstar-industrial.example   | Jonas     | Weber    | Yes    |               | Select | No                   | 0.0000                      | Procurement Team | Buyer |
| 38 | purchasing@northstar-industrial.example | elena.fischer@northstar-industrial.example | Elena     | Fischer  | Yes    |               | Select | No                   | 0.0000                      | Procurement Team | Buyer |

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An administrator should confirm:

- the correct parent customer and website scope;
- active and expiry state;
- the sublogin email is not used by a customer or another sublogin in the same account scope;

- assigned addresses and checkout methods;
- any Role, Budget, Custom Catalog or Order Approval values contributed by add-ons.

Do not treat the Admin grid as a substitute for a storefront test. A record can look complete in Admin and still have no valid checkout combination.

## Test direct sign-in

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1. Sign out of the main account.
2. Open the normal Magento customer login page.
3. Sign in with the sublogin email and password.
4. Confirm the account page shows the sublogin identity.
5. Confirm order history follows **Restrict order view for sublogins**.
6. Add a product to the cart and proceed through address, shipping and payment selection.
7. Place a staging order and confirm its Sublogin value in Admin.

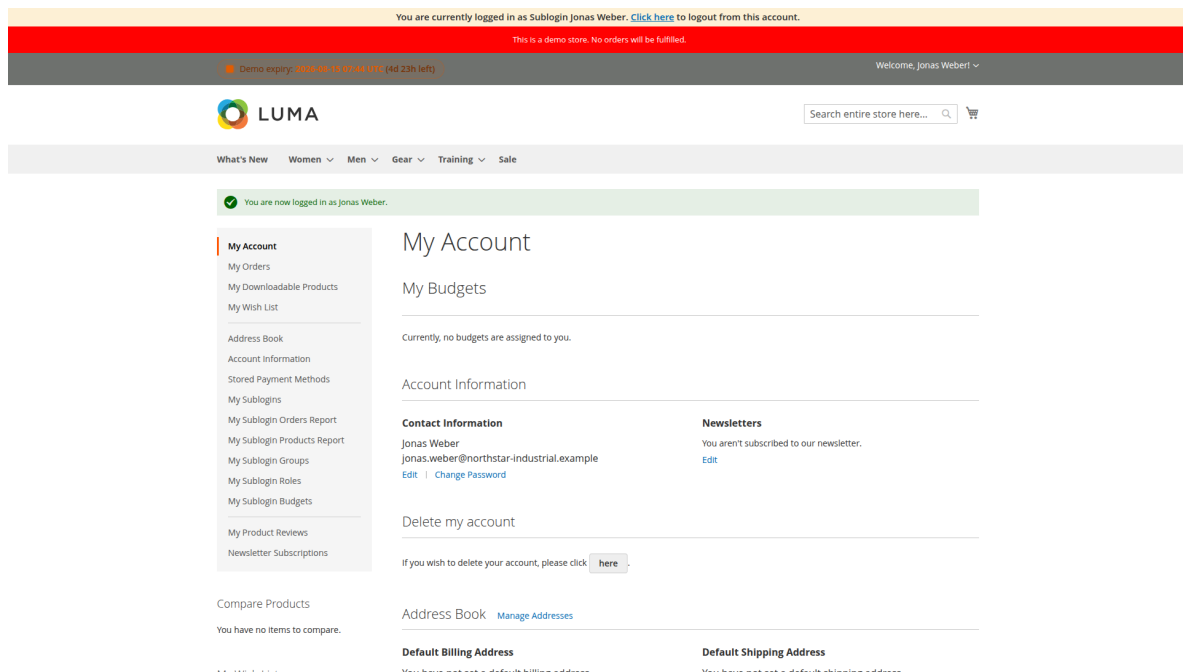
Sublogins use Magento's customer login entry point. They are not separate Magento customer entities, even though they have separate credentials.

## Test main-account impersonation

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When **Allow impersonate sublogin account** is enabled:

1. Sign in as the main customer.
2. Open **My Sublogins**.
3. Select **Login** for the new buyer.
4. Confirm the storefront clearly states that the session is acting as that sublogin.
5. Perform the support check you need.
6. Use the banner link to return to the main account.



Impersonation is intended for account owners and support workflows. It should never require learning or sending the sublogin's password.

## Assign addresses deliberately

The available choices depend on **Address management for sublogins**:

- **Allow all customer addresses** makes every parent address available.
- **Custom address management** requires the main account to assign selected addresses.
- **Disallow customer addresses** requires a usable sublogin-owned address when the workflow permits one.

Test shipping and billing separately. The store may bind billing to the parent default even when the buyer can choose a different delivery address.

## Add optional controls in this order

Once the base checkout works, add controls one at a time:

1. **Role and group**, if the buyer needs storefront restrictions or a place in an approval hierarchy.
2. **Custom Catalog**, if the buyer should see a limited assortment.
3. **Budget**, if spending must be checked at checkout.
4. **Order Approval**, if an order must wait for the main account or a parent group.
5. **One-Time Budget**, only for a temporary next-order allowance.

Place another order after each change. This makes it clear which rule caused a missing product, checkout method or approval state.

## Common first-record failures

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### The email is rejected

The address already belongs to the parent customer, another Magento customer or another sublogin in the same account-sharing scope. Use a unique address or review **Stores > Configuration > Customers > Customer Configuration > Account Sharing Options**.

### Sign-in fails after creation

Check active status, expiry date and required email confirmation. If the parent account was disabled and restored, also review **Reactivate account when disabled**.

### No address is available at checkout

Review the address-management mode, selected parent addresses, permission to add a new address and any default-billing restriction.

### No payment or shipping method is available

Temporarily disable the relevant Sublogin filter in staging. If checkout returns, assign at least one method that is also valid for the current cart, address and Magento shipping or payment configuration.

### The buyer sees the wrong orders

Review **Restrict order view for sublogins**, then confirm the order carries the expected sublogin identity. Integrations that create orders outside the normal Sublogin session may need explicit ownership handling.

## Next steps

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- [Address Management](#)
- [Roles and Permissions](#)
- [Budget Management](#)
- [Order Approval](#)
- [Common Issues](#)