



SOFTWARESILOS

Sublogin Documentation

PDF Manual

MODULE

sublogin

LAST UPDATED

2026-03-29

First Sublogin

Sublogin Documentation · /sublogin/getting-started/first-sublogin

This guide walks you through creating your first sublogin account.

Prerequisites

- Sublogin extension installed and enabled
- Customer account with "Can Create Sublogins" enabled
- Logged in as customer or admin

Method 1: Create from Customer Account (Frontend)

Step 1: Navigate to Sublogins

1. Log in to your customer account
2. Go to **My Account > My Sublogins**
3. Click **Add New Sublogin**

Step 2: Fill in Basic Information

Email Address

john.doe@company.com

Must be unique across all customers and sublogins.

First Name

John

Last Name

Doe

Password

SecurePassword123!

Or leave empty to auto-generate and send via email.

Step 3: Configure Options

Active

- Yes - Sublogin can log in immediately
- ☐ No - Sublogin is disabled

Send Backend Mails

- Yes - Sublogin receives email notifications
- ☐ No - No emails sent to this sublogin

Can Create Sublogins

- Yes - This sublogin can create other sublogins
- ☐ No - Cannot create sublogins

Expire Date (Optional)

2024-12-31

Sublogin will be automatically deactivated after this date.

Step 4: Assign Addresses (Optional)

Customer Addresses Select which customer addresses this sublogin can use:

- Main Office - 123 Business St, New York, NY
- Warehouse - 456 Storage Ave, Brooklyn, NY
- ☐ Home Office - 789 Remote Rd, Queens, NY

Or Create New Address Click "Add New Address" to create a sublogin-specific address.

Step 5: Save Sublogin

Click **Save Sublogin**

The sublogin will receive a welcome email (if "Send Backend Mails" is enabled) with:

- Login credentials
- Link to customer account
- Instructions for first login

Method 2: Create from Admin Panel

Step 1: Navigate to Customer

1. Log in to Magento Admin
2. Go to **Customers > All Customers**
3. Edit the customer account
4. Click on **Sublogins** tab

Step 2: Add New Sublogin

1. Click **Add Sublogin**
2. Fill in the same information as Method 1
3. Additional admin-only options:
 - **Role** (if SubloginRole add-on installed)
 - **Group** (if SubloginRole add-on installed)
 - **Budget** (if SubloginBudget add-on installed)
 - **Order Needs Approval** (if SubloginOrderApproval add-on installed)

Step 3: Configure Advanced Settings

Payment Methods (if enabled in config) Select which payment methods this sublogin can use:

- Bank Transfer
- Credit Card
- ☐ Cash on Delivery
- ☐ PayPal

Shipping Methods (if enabled in config) Select which shipping methods this sublogin can use:

- Standard Shipping
- Express Shipping
- ☐ Overnight Shipping

Step 4: Save

Click **Save Sublogin**

Testing the Sublogin

Test Login

1. Log out of your current account
2. Go to customer login page
3. Enter sublogin email and password
4. Click **Sign In**

You should be logged in as the sublogin.

Test Permissions

Try the following actions:

- Browse products
- Add products to cart
- View cart
- Proceed to checkout
- Place an order
- View order history

Depending on your configuration and permissions (if using Roles add-on), some actions may be restricted.

Test Impersonation

1. Log in as main customer account
2. Go to **My Account > My Sublogins**
3. Find the sublogin you created
4. Click **Login As**

You will be logged in as the sublogin without needing their password.

Common Scenarios

Scenario 1: Employee with Full Access

```
Email: employee@company.com
Active: Yes
Can Create Sublogins: No
Addresses: All customer addresses
Payment Methods: All methods
Shipping Methods: All methods
```

Use Case: Regular employee who can place orders

Scenario 2: Department Manager

```
Email: manager@company.com
Active: Yes
Can Create Sublogins: Yes
Role: Manager (if using Roles add-on)
Budget: €10,000/month (if using Budget add-on)
Addresses: All customer addresses
```

Use Case: Manager who can create sublogins for their team

Scenario 3: Sales Representative

```
Email: sales@company.com
Active: Yes
Can Create Sublogins: No
Role: Sales Rep (if using Roles add-on)
Catalog Visibility: Restricted products (if using Catalog Visibility add-on)
Payment Methods: None (cannot checkout)
```

Use Case: Sales rep who can browse and add to cart but cannot place orders

Scenario 4: Temporary Contractor

```
Email: contractor@company.com
Active: Yes
Expire Date: 2024-06-30
Can Create Sublogins: No
Budget: €1,000 total (if using Budget add-on)
Addresses: Restricted to specific address
```

Use Case: Temporary worker with limited access and budget

Email Confirmation Flow

If "Require Email Confirmation" is enabled in configuration:

1. Sublogin is created with `active = 0`
2. Confirmation email is sent with unique token
3. Sublogin clicks confirmation link
4. Account is activated (`active = 1`)
5. Sublogin can now log in

Troubleshooting

Sublogin Cannot Log In

1. Check if sublogin is active
2. Verify email address is correct
3. Check if expire date has passed
4. Ensure password is correct
5. Check if email confirmation is required

Email Not Received

1. Check "Send Backend Mails" is enabled
2. Verify email address is correct
3. Check spam folder
4. Review email configuration in admin
5. Check `var/log/system.log` for email errors

Cannot Create Sublogin

1. Verify customer has "Can Create Sublogins" enabled
2. Check if email address is already in use
3. Review `var/log/system.log` for errors
4. Ensure all required fields are filled

Next Steps

- [Configure Roles & Permissions](#)
- [Set Up Budgets](#)
- [Configure Order Approval](#)
- [Address Management](#)