



SOFTWARESILOS

Payment Profiles Documentation

PDF Manual

MODULE

payment-profile

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Condition Builder

Payment Profiles Documentation · </payment-profile/features/condition-builder>

The Payment Profiles extension uses Magento's powerful SalesRule condition system to create sophisticated cart and customer-based restrictions.

Screenshot placeholder: payment profile conditions section in admin File:
`./_screenshots/condition-builder.png`

Overview

The condition builder allows you to restrict payment methods based on:

- Cart attributes (subtotal, quantity, weight)
- Product attributes (SKU, category, price, attributes)
- Customer attributes (group, address, segments)
- Shipping attributes (country, region, method)

Accessing the Condition Builder

1. Navigate to **Customers > Payment Profiles**
2. Edit or create a profile
3. Expand the **Conditions** section
4. Click the **+** icon to add conditions

Condition Types

Cart Conditions

Subtotal

Restrict based on cart subtotal (before tax/shipping):

Subtotal equals or greater than 1000

Use Case: Disable COD for orders over €1000

Total Items Quantity

Restrict based on total number of items:

Total Items Quantity is 10 or less

Use Case: Limit payment methods for bulk orders

Total Weight

Restrict based on total cart weight:

Total Weight equals or greater than 50

Use Case: Different payment methods for heavy shipments

Product Conditions

Category

Restrict based on product categories:

Product Category is one of: Electronics, Computers

Use Case: Secure payment methods for high-value categories

SKU

Restrict based on specific SKUs:

Product SKU is one of: PROD-001, PROD-002

Use Case: Special payment terms for specific products

Price

Restrict based on product price:

Product Price equals or greater than 500

Use Case: Secure payment for expensive items

Attribute Set

Restrict based on attribute set:

Product Attribute Set is: Electronics

Use Case: Category-specific payment restrictions

Customer Conditions

Customer Group

Already handled by profile assignment, but can be used in conditions:

Customer Group is one of: Wholesale, Corporate

Use Case: Combined with other conditions for complex rules

Shipping Country

Restrict based on shipping destination:

Shipping Country is one of: DE, AT, CH

Use Case: Region-specific payment methods

Shipping Region

Restrict based on shipping region/state:

Shipping State/Province is one of: CA, NY, TX

Use Case: State-specific payment regulations

Shipping Postcode

Restrict based on postal code:

Shipping Postcode is: 10*

Use Case: Local payment methods for specific areas

Condition Operators

Comparison Operators

- `is` - Exact match
- `is not` - Not equal
- `equals or greater than` - `>=`
- `equals or less than` - `<=`
- `greater than` - `>`
- `less than` - `<`

List Operators

- `is one of` - In list
- `is not one of` - Not in list

String Operators

- `contains` - Substring match
- `does not contain` - Substring not match

Combining Conditions

AND Logic (ALL)

All conditions must be true:

If ALL of these conditions are TRUE:
Subtotal equals or greater than 500
Shipping Country is: DE
Product Category is one of: Electronics

Result: All three conditions must match

OR Logic (ANY)

At least one condition must be true:

If ANY of these conditions are TRUE:

Shipping Country is: US

Shipping Country is: CA

Shipping Country is: MX

Result: Any North American country matches

Nested Conditions

Combine AND/OR logic:

If ALL of these conditions are TRUE:

Subtotal equals or greater than 1000

If ANY of these conditions are TRUE:

Shipping Country is: DE

Shipping Country is: AT

Shipping Country is: CH

Result: High-value orders to DACH region

Practical Examples

Example 1: B2B High-Value Orders

If ALL of these conditions are TRUE:

Subtotal equals or greater than 5000

Customer Group is one of: Wholesale, Corporate

Shipping Country is one of: DE, AT, CH

Payment Methods: Bank Transfer, Purchase Order **Use Case:** Secure payment for large B2B orders in DACH region

Example 2: Electronics Category Restriction

If ALL of these conditions are TRUE:

Product Category is one of: Electronics, Computers

Subtotal equals or greater than 1000

Payment Methods: Credit Card, PayPal (no COD) **Use Case:** Secure payment for expensive electronics

Example 3: Regional Payment Methods

If ANY of these conditions are TRUE:

Shipping Country is: DE
Shipping Country is: AT
Shipping Country is: CH

Payment Methods: SEPA, Sofort, Credit Card **Use Case:** DACH-specific payment methods

Example 4: Bulk Order Restrictions

If ALL of these conditions are TRUE:

Total Items Quantity equals or greater than 50
Total Weight equals or greater than 100

Payment Methods: Bank Transfer, Purchase Order (no COD) **Use Case:** Bulk orders require advance payment

Example 5: VIP Customer Benefits

If ALL of these conditions are TRUE:

Customer Group is: VIP
Subtotal equals or greater than 100

Payment Methods: All methods + Net 30 **Use Case:** VIP customers get payment terms for orders over €100

Advanced Conditions

Product Attribute Conditions

Use custom product attributes:

If ALL of these conditions are TRUE:

Product Attribute [brand] is one of: Apple, Samsung
Subtotal equals or greater than 500

Use Case: Brand-specific payment restrictions

Customer Segment Conditions

Use Magento customer segments:

If ALL of these conditions are TRUE:

Customer Segment is: High Value Customers
Subtotal equals or greater than 1000

Use Case: Segment-based payment benefits Note: Segment/lifetime-style conditions depend on your Magento setup and available attributes.

Shipping Method Conditions

Restrict based on shipping method:

```
If ALL of these conditions are TRUE:  
Shipping Method is: flatrate_flatrate
```

Use Case: Different payment methods per shipping method

Condition Validation

When Conditions Are Evaluated

Conditions are validated:

- During checkout when payment methods are loaded
- When cart is updated (quantity, products)
- When shipping address changes
- When customer logs in/out

Validation Performance

- Conditions are cached per quote
- Validation is optimized for checkout usage
- No impact on catalog browsing

Debugging Conditions

Test Conditions

1. Create a test profile with conditions
2. Add products to cart matching conditions
3. Proceed to checkout
4. Verify correct payment methods are shown

Common Issues

Issue: Conditions not matching

- **Check:** Condition values (case-sensitive for strings)
- **Check:** Operator (is vs contains)
- **Check:** AND vs OR logic

Issue: Conditions too restrictive

- **Check:** All conditions must be true for AND logic
- **Solution:** Use OR logic or separate profiles

Best Practices

1. Keep Conditions Simple

```
✓ GOOD:
Subtotal >= 1000

✗ BAD:
Subtotal >= 1000 AND
Subtotal <= 5000 AND
Category = Electronics AND
Brand = Apple AND
Weight >= 10 AND
Country = DE
```

2. Use Multiple Profiles

Instead of complex nested conditions, create multiple profiles with different priorities.

3. Test Thoroughly

Test conditions with:

- Edge cases (exactly 1000, not 999 or 1001)
- Different customer types
- Various cart combinations

4. Document Conditions

Add notes in profile name:

```
Priority 10: B2B High Value (>€5000, DACH)
```

Next Steps

- [Rule-Based Restrictions](#)
- [Priority System](#)
- [B2B Payment Terms](#)