



Create the First Profile

Payment Profile Documentation

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

LAST UPDATED
2026-08-22

SOURCE
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EXTENSION
[Magento 2 Extension Payment Profiles](#)

Create the First Profile

Start with a simple profile that has no conditions. This confirms website, audience and payment-method assignment before condition logic is introduced.

Example goal

Allow the store's existing bank-transfer and check or money-order methods for the Wholesale customer group on the Main Website.

Create the profile

1. Open **Customers > Payment Profiles**.
2. Select **Add New**.
3. Enter a descriptive name such as **Main Website - Wholesale Standard**.
4. Set a unique priority, for example **100**.
5. Select the website.
6. Select the Wholesale customer group.
7. Select only the payment methods this audience may use.
8. Leave Conditions empty for the first test.
9. Save the profile.

The screenshot shows a web application interface for creating a payment profile. On the left is a dark sidebar with icons for Dashboard, Sales, Catalogs, Customers (selected), Marketing, Content, Reports, Stores, System, and Find Partners & Extensions. The main header area displays 'Wholesale Standard Payments' and a demo expiry notice: 'Demo expiry: 2026-08-19 14:45 UTC (4d 22h left)'. Below the header are buttons for 'Back', 'Delete', 'Save and Continue Edit', and 'Save'. The form is divided into sections: 'General Information' and 'Conditions'. The 'General Information' section contains: 'Profile Name' (Wholesale Standard Payments), 'Priority' (100), 'Website' (Main Website), 'Customer Groups' (a dropdown menu with 'NOT LOGGED IN', 'General', 'Wholesale' (selected), 'Retailer', and 'Named Account Exceptions'), and 'Payment Methods' (a dropdown menu with 'Check / Money order', 'Bank Transfer Payment' (selected), and 'No Payment Information Required'). The 'Conditions' section is currently empty.

The payment-method list is refreshed for the selected website. If you change the website, review the selected methods again before saving.

DASHBOARD

SALES

CATALOG

CUSTOMERS

MARKETING

CONTENT

REPORTS

STORES

SYSTEM

RMS PARTNERS & EXTENSIONS

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

Payment Profiles

admin

Demo expiry: 2026-08-19 14:45 UTC (4d 22h left)

Add New

Search by keyword

Filters

Default View

Columns

Export

Customers

Customer Groups

Priority

Payment Methods

Website

Cancel

Apply Filters

Actions

3 records found

20 per page

1 of 1

	ID	Profile name	Customers	Customer Groups	Priority	Payment Methods	Website	Action
☐	1	Rheinwerk Bank Transfer Exception	Laura Stein	Named Account Exceptions	10	banktransfer	Main Website	Select
☐	2	Wholesale Orders from €1,000		Wholesale	20	banktransfer	Main Website	Select
☐	3	Wholesale Standard Payments		Wholesale	100	checkmo, banktransfer	Main Website	Select

Test the profile

Use a real checkout flow with a fictional test customer in the Wholesale group:

1. Confirm both selected methods work when Payment Profile is disabled.
2. Enable Payment Profile.
3. Add an ordinary shippable product and proceed to payment.
4. Confirm that only the selected, otherwise available methods remain.
5. Repeat with a customer group that is not assigned.
6. Confirm that the result matches the configured no-match policy.

This is a demo store. No orders will be fulfilled.

Shipping

Review & Payments

Payment Method

Bank Transfer Payment

☒ My billing and shipping address are the same

Laura Stein
Rheinwerk Industrie GmbH
Rheinwerkstraße 18
Düsseldorf, Nordrhein-Westfalen 40210
Germany
+49 211 555 1840

Place Order

Apply Discount Code

Order Summary

Cart Subtotal €45.00
Shipping €5.00
Flat Rate - Fixed

Order Total €50.00

1 Item in Cart

Ship To:

Laura Stein
Rheinwerk Industrie GmbH
Rheinwerkstraße 18
Düsseldorf, Nordrhein-Westfalen 40210
Germany
+49 211 555 1840

Shipping Method:

Flat Rate - Fixed

Add one condition

After the basic profile works, add one easy-to-reproduce condition, such as a subtotal threshold. Test below, exactly at and above the boundary.

If another assigned profile has a lower priority number and also matches, that earlier profile wins. See [Priority and First Match](#).