



SOFTWARESILOS

Payment Profiles Documentation

PDF Manual

MODULE

payment-profile

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First Profile

Payment Profiles Documentation · </payment-profile/getting-started/first-profile>

This guide walks you through creating your first payment profile.

Screenshot placeholder: payment profile edit form for the first rule File:
`./_screenshots/first-profile.png`

Scenario: B2B Invoice Payment

We'll create a profile that restricts invoice payment to wholesale customers with orders over €500.

Step 1: Navigate to Payment Profiles

1. Log in to Magento Admin
2. Go to **Customers > Payment Profiles**
3. Click **Add New Profile**

Step 2: General Information

Fill in the basic profile information:

Profile Name

B2B Invoice Payment

A descriptive name for internal reference.

Priority

10

Lower number = higher priority. This profile will be evaluated first.

Website

Main Website

Select the website where this profile applies. If you later change the website, review the selected payment methods again before saving.

Customer Groups

Select the customer groups that should have access to invoice payment:

- Wholesale

- Corporate
- ☐ General (retail customers)
- ☐ NOT LOGGED IN

Payment Methods

Select which payment methods are allowed for this profile:

- Bank Transfer
- Purchase Order
- Invoice
- ☐ Credit Card
- ☐ PayPal
- ☐ Cash on Delivery

Step 3: Conditions (Optional)

Add conditions to restrict when this profile applies:

1. Click **Conditions** section
2. Click the **+** icon to add a condition
3. Select **Subtotal**
4. Set operator to **equals or greater than**
5. Enter value: **500**

Your condition should look like:

If ALL of these conditions are TRUE:
Subtotal equals or greater than 500

This ensures invoice payment is only available for orders over €500.

Step 4: Customer Assignment (Optional)

If you want to assign specific customers to this profile:

1. Scroll to **Customer Assignment** section
2. Use the grid to search for customers
3. Check the boxes next to customers you want to assign
4. These customers will have access to this profile regardless of their customer group

Note: If multiple profiles can apply, final behavior still depends on priority and conditions.

Step 5: Save Profile

1. Click **Save** or **Save and Continue Edit**
2. Clear cache: `php bin/magento cache:flush`
3. The profile is now active!

Step 6: Test the Profile

Test as Wholesale Customer

1. Log in to frontend as a wholesale customer
2. Add products worth over €500 to cart
3. Proceed to checkout
4. **Expected:** Only Bank Transfer, Purchase Order, and Invoice are shown

Test as Retail Customer

1. Log in as a retail customer (General group)
2. Add products to cart
3. Proceed to checkout
4. **Expected:** All standard payment methods are shown (profile doesn't apply)

Test with Low Cart Value

1. Log in as wholesale customer
2. Add products worth under €500
3. Proceed to checkout
4. **Expected:** All standard payment methods (condition not met)

Common Variations

Variation 1: No Conditions

Remove the subtotal condition to allow invoice payment for all wholesale orders regardless of amount.

Variation 2: Multiple Conditions

Add more conditions:

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

Variation 3: VIP Customers Only

Use customer groups plus individual assignment for exceptions, then verify priorities.

Next Steps

Now that you've created your first profile, explore more features:

- [Rule-Based Restrictions](#)
- [Priority System](#)
- [Condition Builder](#)
- [More Use Cases](#)

Troubleshooting

Profile Not Working

1. Verify extension is enabled in configuration
2. Clear cache
3. Check customer is in the correct customer group
4. Verify conditions are met (cart value, etc.)
5. Check if another profile with higher priority is overriding

Wrong Payment Methods Shown

1. Check priority order - lower number = higher priority
2. Verify customer group assignment
3. Review conditions - they must ALL be true
4. Check if customer has individual assignment to another profile