Create the First Profile

Payment Profiles Documentation

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

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EXTENSION
Magento 2 Extension Payment Profiles

Create the First Profile

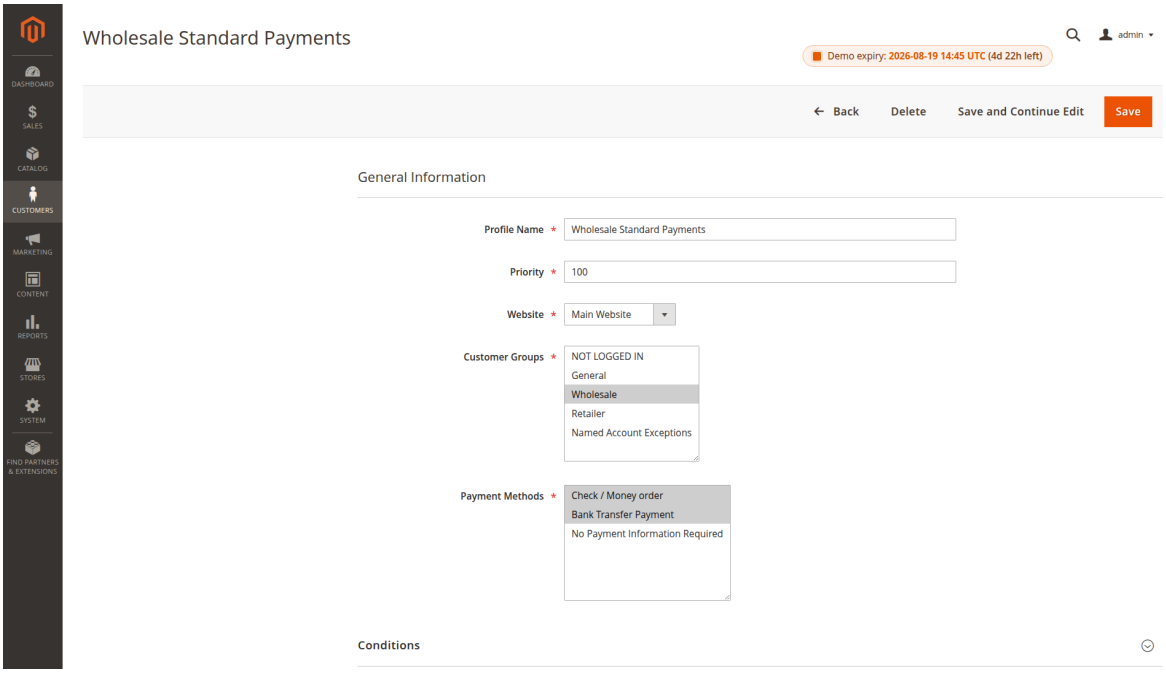
Start with a simple profile that has no conditions. This confirms website, audience and payment-method assignment before condition logic is introduced.

Example goal

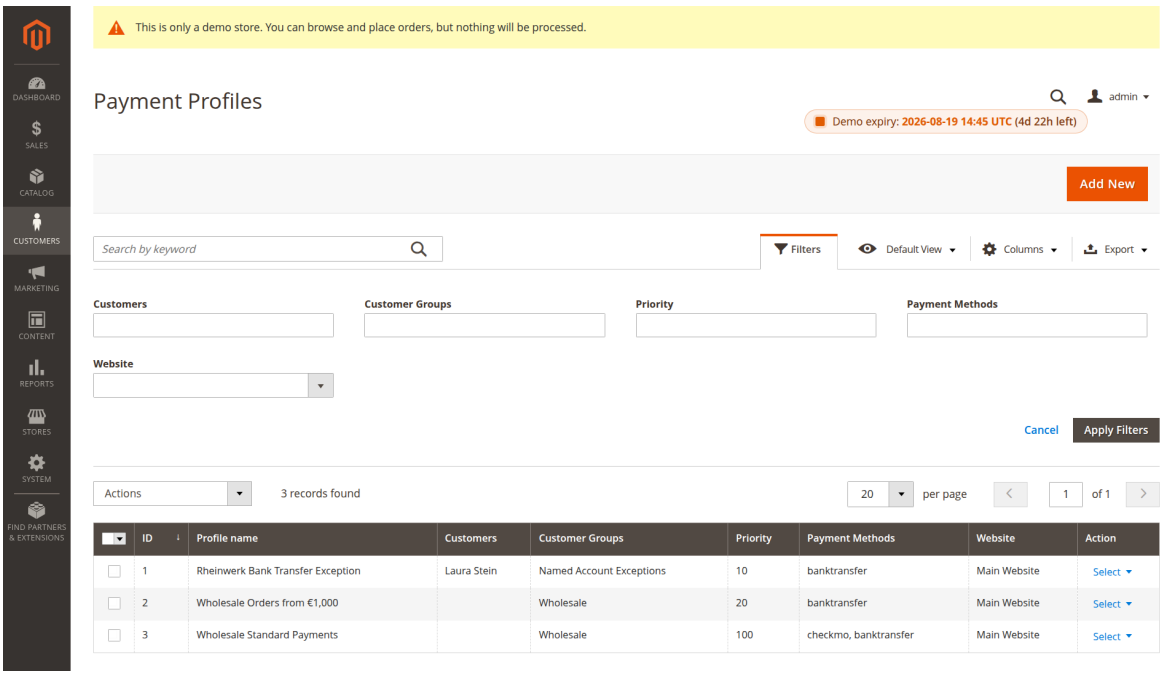
Allow the store's existing bank-transfer and check or money-order methods for the Wholesale customer group on the Main Website.

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



Working with the profiles grid

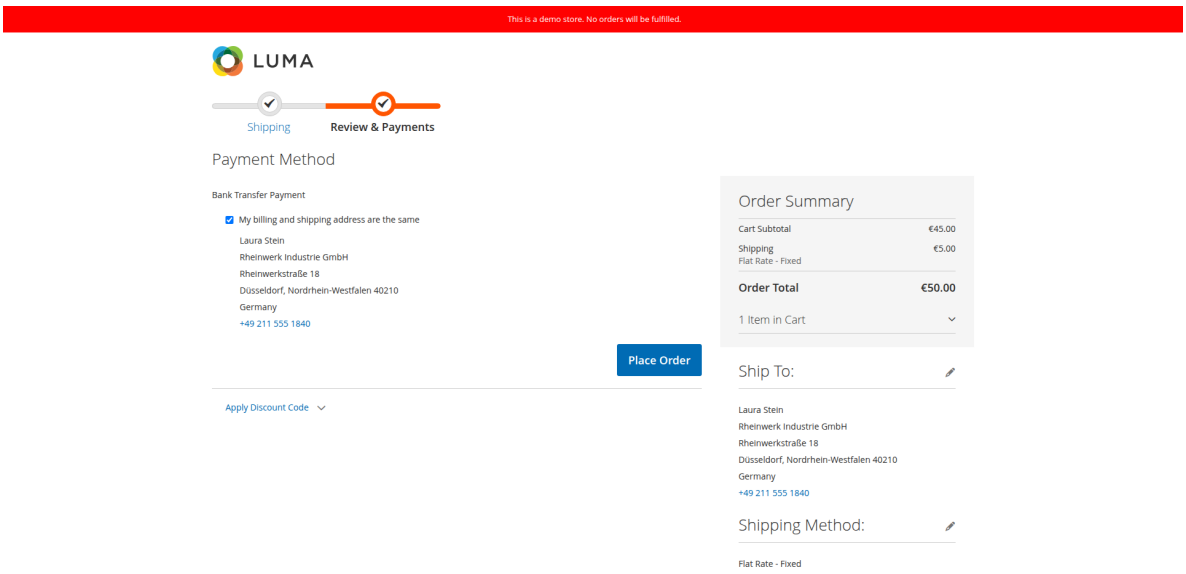
The listing supports day-to-day maintenance without opening each profile:

- **Inline editing** — Profile name, Priority and Website can be edited directly in the row.
- **Filters** — the Customers, Customer Groups, Payment Methods and Website columns are filterable, so a profile can be found by who it serves or which method it grants.
- **Full-text search** — the toolbar search box scans the listing.
- **Export** — the export button downloads the current grid view.
- **Mass delete** — select rows and use the Delete mass action; it requires the `delete` ACL resource described in Admin Permissions.

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.



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.