



SOFTWARESILOS

Pricelist

PDF Manual

MODULE

pricelist

LAST UPDATED

2026-03-29

Automatic Customer Assignment

Pricelist · </pricelist/features/automatic-assignment>

Automatically assign customers to pricelists based on their attributes - no manual assignment needed.

Overview

Automatic assignment eliminates manual customer-to-pricelist mapping. Define matching rules on each pricelist using customer and address attributes. When customers log in or update profiles, the system evaluates all active pricelists and auto-assigns matching ones.

Benefits

- **Zero manual work:** Customers automatically get correct pricing
 - **Real-time updates:** Changes apply immediately on login
 - **New customer ready:** First-time customers get pricing instantly
 - **Attribute-driven:** Business logic encoded in rules
 - **Scalable:** Works with 10 or 10,000 customers
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How It Works

Evaluation Trigger

System evaluates pricelists when:

1. Customer logs in
2. Customer updates profile/address
3. Customer group changes
4. Admin manually triggers re-evaluation
5. Cron job (if configured)

Evaluation Process

1. Get all ACTIVE pricelists for customer's website
2. Filter by date validity (`from_date <= today <= to_date`)
3. For each pricelist, check matching attributes:
 - Customer group matches?
 - Company name matches?
 - Tax ID matches?
 - Postcode matches?
 - Region matches?
 - Country matches?
4. If ALL filled attributes match → Assign customer to pricelist
5. Apply priority/merge logic for conflicts

Important: ALL filled attributes must match (AND logic, not OR).

Configuration

Enable Auto-Assignment

Path: Stores > Configuration > Pricesystem > Pricelist > Enable Auto Assign Customers

Setting: pricesystem/pricelist/enable_auto_assign_customers_to_pricelist

Values:

- **Yes (Required):** Auto-assignment enabled
- **No:** Only manual assignments work

Critical: Must be enabled for attribute-based matching!

Match Type

Path: Stores > Configuration > Pricesystem > Pricelist > Match Exact Type

Setting: pricesystem/pricelist/match_exact_type

Values:

Loose Matching (No - Default)

Partial string match, case-insensitive.

Examples:

- Pricelist company: "ACME"
- Customer company: "ACME Corporation" → **MATCH** (contains "ACME")
- Customer company: "AcMe Corp" → **MATCH** (case-insensitive)

Use Case: Flexible matching, forgives typos/variations.

Exact Matching (Yes)

Strict equality, case-sensitive.

Examples:

- Pricelist company: "ACME"
- Customer company: "ACME Corporation" → **NO MATCH** (not exact)
- Customer company: "ACME" → **MATCH** (exact)
- Customer company: "acme" → **NO MATCH** (case-sensitive)

Use Case: Precise matching, security-sensitive scenarios.

Matching Attributes

Customer Group ID

Field: `customer_group_id`

Source: Customer entity → `group_id` field

Example:

- Pricelist: `group_id` = 2 (Wholesale)
- Customer: `group_id` = 2
- **Result:** MATCH

Use Cases:

- Wholesale/retail pricing
- VIP tiers
- Member-only pricing

Multi-Group: Customers belong to exactly ONE group at a time. Match is simple equality check.

Company Name

Field: `customer_company`

Source: Customer entity → `company` attribute (default or custom)

Example:

```
Pricelist: customer_company = "ACME Corporation"
Customer: company = "ACME Corporation"
Match: Yes (exact) or Yes (loose if contains "ACME")
```

Use Cases:

- B2B contract pricing
- Enterprise customers
- Corporate accounts

Best Practice:

- Use loose matching for flexibility
 - Standardize company names in CRM
 - Document approved variations
-

Tax/VAT Number

Field: `customer_tax`

Source: Customer entity → `taxvat` attribute

Example:

```
Pricelist: customer_tax = "DE123456789"  
Customer: taxvat = "DE123456789"  
Match: Yes
```

Use Cases:

- EU VAT-registered businesses
- Tax-exempt organizations
- Verified business accounts

Notes:

- Usually exact match (even with loose mode)
 - Format-sensitive (include dashes, spaces as stored)
 - Verify data quality
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Postcode

Field: `address_postcode`

Source: Customer billing or shipping address → `postcode`

Example:

```
Pricelist: address_postcode = "90210"  
Customer billing: postcode = "90210"  
Match: Yes
```

Use Cases:

- ZIP code-based regional pricing
- Local delivery zones
- State-specific pricing

Notes:

- Checks both billing and shipping addresses
 - Match if either address matches
 - Loose mode: "9021" matches "90210"
-

Region

Field: `address_region`

Source: Customer address → `region` text field

Example:

```
Pricelist: address_region = "California"  
Customer billing: region = "California"  
Match: Yes
```

Use Cases:

- State/province pricing
- Regional campaigns
- Tax jurisdictions

Data Quality:

- Magento stores region as text (not ID)
 - "California" vs "CA" might not match
 - Standardize or use loose matching
-

Country

Field: address_country

Source: Customer address → country_id (2-letter ISO code)

Example:

```
Pricelist: address_country = "US"  
Customer billing: country_id = "US"  
Match: Yes
```

Use Cases:

- Country-specific pricing
- Currency localization
- Regulatory compliance

Notes:

- Always 2-letter ISO codes (US, DE, GB, FR, etc.)
 - Exact match even in loose mode
 - Most common matching attribute
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Multi-Attribute Matching

AND Logic

All filled attributes must match simultaneously.

Example 1: Two Attributes

```
Pricelist:
- customer_group_id: 2 (Wholesale)
- address_country: US

Customer:
- group_id: 2 (Wholesale) ✓
- country: US ✓
Result: MATCH (both match)
```

Example 2: Partial Match Fails

```
Pricelist:
- customer_group_id: 2 (Wholesale)
- address_country: US

Customer:
- group_id: 2 (Wholesale) ✓
- country: DE ✗
Result: NO MATCH (country doesn't match)
```

Example 3: More Attributes

```
Pricelist:
- customer_group_id: 2
- customer_company: "ACME"
- address_country: US
- address_region: "California"

Customer:
- group_id: 2 ✓
- company: "ACME Corporation" ✓ (loose match)
- country: US ✓
- region: "California" ✓
Result: MATCH (all 4 match)
```

Empty Attributes Ignored

Null/empty attributes are not checked.

Example:

```
Pricelist:
- customer_group_id: 2
- address_country: NULL (not filled)

Customer:
- group_id: 2 ✓
- country: DE (doesn't matter, pricelist doesn't check country)
```

Result: MATCH (only group is checked)

Strategy: Leave attributes empty to broaden matching.

Common Scenarios

Scenario 1: Wholesale Customers Only

Goal: All wholesale customers get this pricelist.

Pricelist:

- customer_group_id: 2 (Wholesale)
- All other attributes: NULL

Result: Any customer in Wholesale group matches, regardless of location/company.

Scenario 2: US Wholesale Customers

Goal: Wholesale customers in US only.

Pricelist:

- customer_group_id: 2 (Wholesale)
- address_country: US
- All other attributes: NULL

Result: Must be wholesale AND in US.

Scenario 3: California Wholesale for ACME Corp

Goal: Very specific targeting.

Pricelist:

- customer_group_id: 2 (Wholesale)
- customer_company: "ACME"
- address_region: "California"
- address_country: US

Result: Only wholesale ACME employees in California, USA.

Scenario 4: EU VAT-Registered Businesses

Goal: EU businesses with VAT number.

Pricelist:

- customer_tax: "DE%" (if using wildcards) OR specific VAT
- address_country: DE/FR/IT (create multiple pricelists per country)

Result: VAT-registered businesses in target countries.

Note: Might need one pricelist per country or use group assignment instead.

Scenario 5: Regional Postcode Ranges

Goal: Specific ZIP codes get special pricing.

Challenge: Postcode ranges not directly supported.

Workaround 1: Multiple Pricelists

- Create pricelist for "90210"
- Create pricelist for "90211"
- Create pricelist for "90212"
- Assign same products/prices

Workaround 2: Custom Attribute

- Create custom customer attribute: "pricing_zone"
 - Set via import/automation based on postcode
 - Match on custom attribute instead
-

Manual Override

Group Assignment

Assign entire customer groups to pricelist, overriding attribute matching.

Path: Pricelist Edit > Groups Tab

Use Case: "All VIP members get this pricelist, regardless of attributes."

Combines with automatic: Customer can match via attributes AND be in assigned group.

Direct Customer Assignment

Assign specific customers to pricelist manually.

Path: Pricelist Edit > Customers Tab

Use Case: "Customer #12345 gets this contract pricelist (special exception)."

Overrides automatic: Manually assigned customers always get pricelist, even if attributes don't match.

Testing Automatic Assignment

Test Plan

1. **Create test pricelist:**

- Name: "Test - Wholesale US"
- customer_group_id: 2
- address_country: US
- Active: Yes

2. **Create test customer:**

- Group: Wholesale (2)
- Country: US
- Company: "Test Co"

3. **Test assignment:**

- Log in as test customer
- Check assigned pricelists (admin or API)
- Verify pricelist appears

4. **Test exclusion:**

- Change customer country to DE
- Log out, log back in
- Verify pricelist NOT assigned

5. **Test re-assignment:**

- Change customer back to US
 - Log out, log back in
 - Verify pricelist re-assigned
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Troubleshooting

Customer Not Assigned to Pricelist

Checklist:

1. ✓ Auto-assignment enabled? (`enable_auto_assign_customers_to_pricelist = Yes`)

2. ✓ Pricelist active? (is_active = Yes)
3. ✓ Date range valid? (from_date <= today <= to_date)
4. ✓ Website matches? (customer on correct website)
5. ✓ All attributes match? (check each filled attribute)
6. ✓ Customer logged in recently? (triggers evaluation)
7. ✓ Cache cleared?

Debug:

```
-- Check customer attributes
SELECT entity_id, group_id, email FROM customer_entity WHERE entity_id = 123;

SELECT company, taxvat FROM customer_entity_varchar WHERE entity_id = 123
AND attribute_id IN (...);

-- Check pricelist matching attributes
SELECT * FROM pricesystem_pricelist WHERE id = 456;

-- Check assignments
SELECT * FROM pricesystem_pricelist_customer WHERE customer_id = 123;
```

Wrong Pricelist Assigned

Causes:

1. Multiple pricelists match (check priority)
2. Manual assignment overriding automatic
3. Group assignment in addition to automatic
4. Outdated cache

Resolution:

1. Review all pricelists customer matches
2. Check priority values
3. Clear customer pricelist assignments (if testing)
4. Re-login to trigger fresh evaluation

Loose vs Exact Matching Issues

Symptom: Customer matches when they shouldn't (or vice versa).

Check: match_exact_type configuration

Example:

- Pricelist company: "ACME"
- Customer company: "ACME Corporation"
- Loose: Matches
- Exact: Doesn't match

Fix: Choose appropriate mode or standardize data.

Best Practices

Data Quality

- Standardize company names
- Validate tax IDs on registration
- Use consistent region naming
- Encourage complete profiles

Attribute Selection

- Start with simple (group + country)
- Add attributes only when needed
- Document matching logic
- Test edge cases

Performance

- Don't create too many pricelists (100s are fine, 10,000s might be slow)
- Use group assignment for large segments
- Consider caching strategies

Documentation

- Document which attributes each pricelist uses
- Explain business rules to team
- Maintain matching logic reference

Related Documentation

- [Creating Pricelists](#)
- [Named Pricelists](#)
- [Priority Resolution](#)