

Payment & Shipping Restrictions

for Magento 2



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Getting Around

Magento 2 Payment & Shipping Restrictions enhances native Magento functionality meant to specify payment and shipping methods at checkout against a variety of criteria. The extension adds the Customer Group criterion. Now vendors are able to specify which payment and shipping methods are to be shown at checkout depending on shoppers' belonging to particular customer groups.

Compatibility: Magento Open Source 2.3.X - 2.4.X, Magento Commerce 2.3.X - 2.4.X

Introducing the Magento 2 Payment & Shipping Restrictions

Payment & Shipping Restrictions for Magento 2 comes as two modules in one pack: Shipping Restrictions and Payment Restrictions. These are the tools to specify payment and shipping methods available on the checkout page with regard to customers' belonging to particular customer groups, as pre-configured on your store.

What is special in **Aheadworks Payment & Shipping Restrictions for Magento 2** in comparison to the native Magento functionality:

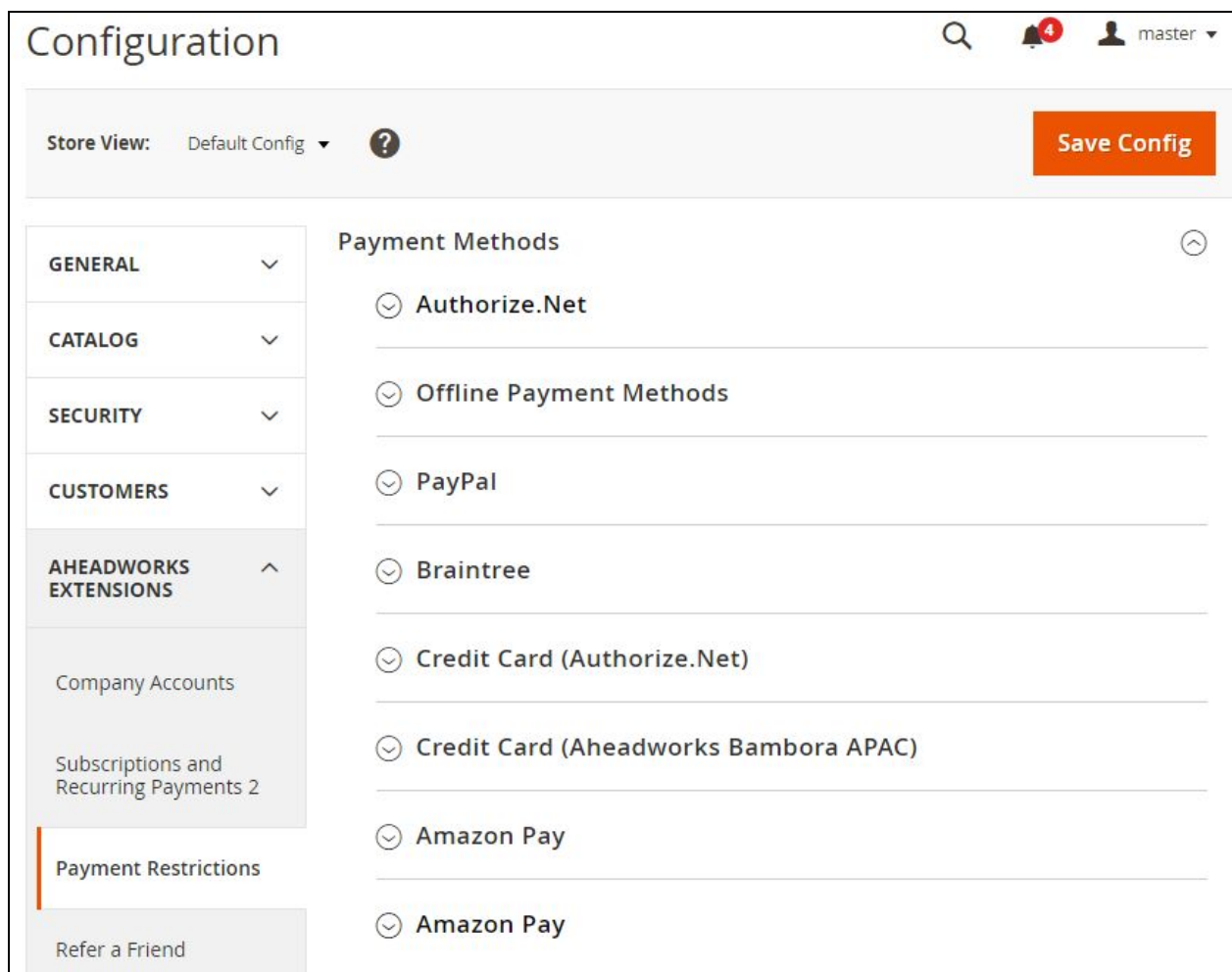
- Payment and shipping methods restricted at checkout
- Customer groups to restrict payment and shipping methods
- Separate restrictions for shipping and payment
- Multiselect of customer groups and All Groups selector
- Support of Multishipping
- Integration with [Company Accounts](#), [Smart One Step Checkout](#).

Using Magento 2 Payment Restrictions

The extension comes as a set of similar configuration facilities available at **Stores > Configuration > Aheadworks Extensions > Payment Restrictions**.

Payment Methods

The page will feature the list of all the payment methods, enabled on the store.



The screenshot shows the Magento 2 Configuration interface. At the top, there is a search icon, a notification bell with a red '4', and a user profile icon labeled 'master'. Below this, the 'Store View' is set to 'Default Config' with a help icon. A prominent orange 'Save Config' button is located in the top right corner. On the left side, a vertical navigation menu lists various configuration sections: GENERAL, CATALOG, SECURITY, CUSTOMERS, AHEADWORKS EXTENSIONS (which is currently expanded), Company Accounts, Subscriptions and Recurring Payments 2, Payment Restrictions (highlighted with an orange bar), and Refer a Friend. The main content area is titled 'Payment Methods' and contains a list of payment methods, each with a dropdown arrow icon to its left: Authorize.Net, Offline Payment Methods, PayPal, Braintree, Credit Card (Authorize.Net), Credit Card (Aheadworks Bambora APAC), Amazon Pay, and another Amazon Pay entry.

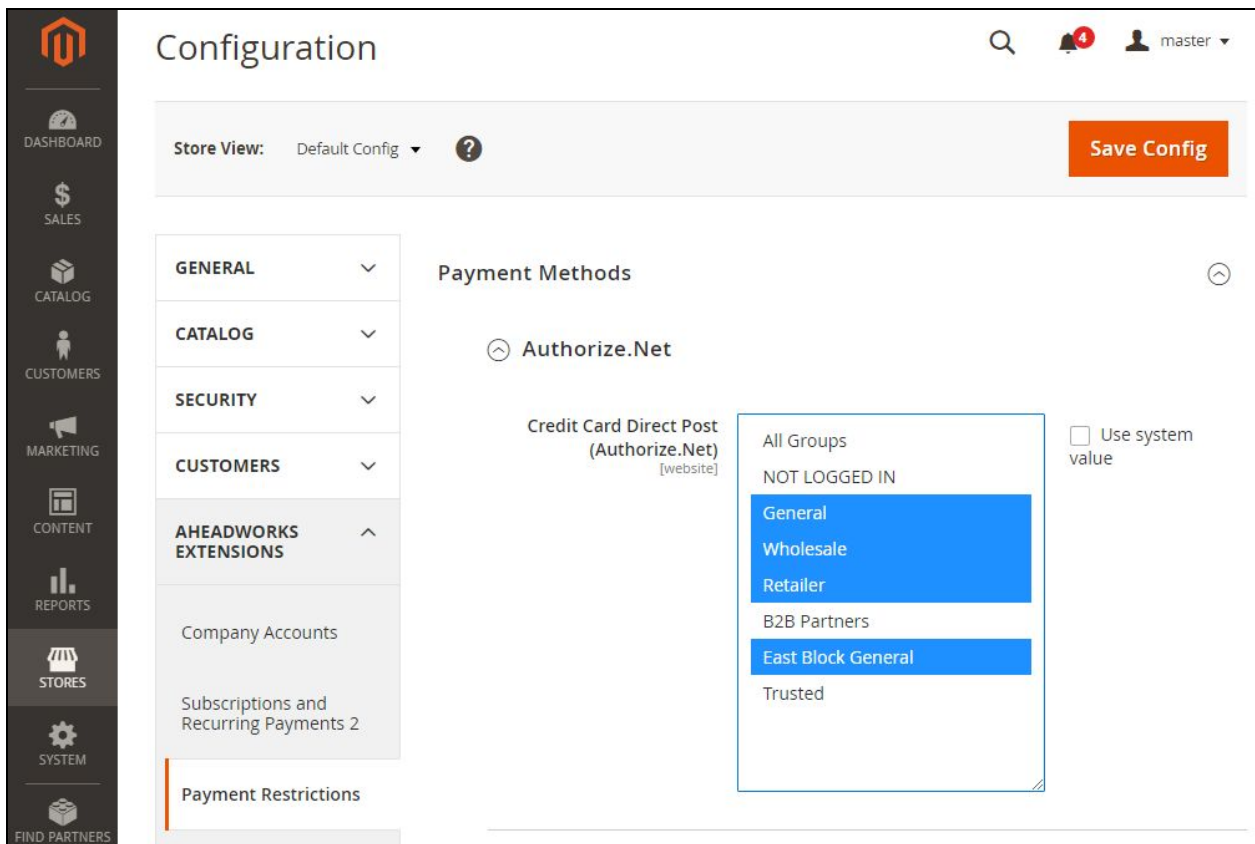
To enable/disable payment methods, proceed to **Stores > Configuration > Sales > Payment Methods**. Should you have any questions regarding the use of thereof refer to the [official Magento 2 manual](#) or the instructions of a correspondent payment

method/gateway available on the web. For example, if you are using the [Bambora APAC](#) extension from Aheadworks, your [guide can be accessed here](#).

Only the methods enabled on the store will feature for restricting on the config page of the present module.

Restrictions

To set restrictions, click on a payment method and assign groups of customers to be eligible for this type of payment.



The screenshot displays the 'Configuration' page in a Magento system. On the left is a vertical sidebar with navigation icons for Dashboard, Sales, Catalog, Customers, Marketing, Content, Reports, Stores, System, and Find Partners. The main content area is titled 'Configuration' and shows 'Store View: Default Config'. A 'Save Config' button is in the top right. The 'Payment Methods' section is active, showing 'Authorize.Net' with a sub-label 'Credit Card Direct Post (Authorize.Net) [website]'. A dropdown menu is open, listing customer groups: 'All Groups', 'NOT LOGGED IN', 'General', 'Wholesale', 'Retailer', 'B2B Partners', 'East Block General', and 'Trusted'. The 'General' and 'East Block General' groups are highlighted in blue. A checkbox for 'Use system value' is present to the right of the dropdown.

Clicking on the name of the payment method will unfold the full name of thereof, as well as the check-list of all customer groups available on the store. To add/delete customer groups, proceed to **Customers > Customer Groups**. The [official Magento 2](#)

[manual](#) will instruct you on how to do that. Name your custom groups meaningfully, so that you later you have meaningful restrictions on payments.

By default all customer groups are given same rights to all payment methods. It means that all payment methods are open for all groups. **When in the default mode**, the list of groups will come inactive, greyed-out, and the Use System value checkbox checked.

To specify the groups which will have access to the chosen payment method, untick the Use System Value checkbox and click on the customer group on the list. The multiselect feature is available in the extension: select the group, press the CTRL button on the keyboard, hold it and select as many other groups as you need. Multiselect works with your mouse and mobile devices too.

The **All Groups** option will apply restrictions to all groups presented on the list.

Sample restrictions:

B2C customers will be thankful for their ever favorite credit/debit cards or payment gateways. **B2B** clients, in turn, will appreciate bank transfers or letters of credit.

Only those methods of payment which were pre-configured for display with the present extension will feature on the **Checkout page**. This will save time of customers, and furthermore suggest them you know their needs and preferences.

Using Magento 2 Shipping Restrictions

Configuration Options

The extension comes as a set of single-type configuration facilities available at **Stores > Configuration > Sales > Shipping Restrictions**. The page will feature the list of all shipping methods saved on the store.

The screenshot shows the 'Configuration' page in a Magento system. On the left is a vertical sidebar with navigation icons for Dashboard, Sales, Catalog, Customers, Marketing, Content, Reports, Stores, System, and Find Partners & Extensions. The main content area is titled 'Configuration' and includes a search icon, a notification bell with '12', and a user profile 'master'. Below the title, there is a 'Store View' dropdown set to 'Default Config' and a 'Save Config' button. A left-hand menu lists categories: GENERAL, CATALOG, AHEADWORKS EXTENSIONS, SALES, and Shipping Methods. The 'SALES' category is expanded, showing sub-items: Sales, Sales Emails, Shipping Settings, Multishipping Settings, and Shipping Methods. The 'Shipping Methods' section is active, displaying a list of shipping methods: Flat Rate, Free Shipping, Table Rates, Magento Shipping, UPS, USPS, FedEx, and DHL. Each method has a dropdown arrow to its right.

Learn more on configuring shipping methods in the [official Magento 2 user guide](#).

To set restrictions, unfold the options of the shipping method by clicking on the name of the method, and scroll down to the **Allowed for Selected Customer Groups Only** parameter.

The screenshot displays the Magento 2 Configuration interface. On the left is a dark sidebar with icons for Dashboard, Sales, Catalog, Customers, Marketing, Content, Reports, Stores, System, and Find Partners & Extensions. The main area is titled 'Configuration' and shows 'Store View: Default Config'. The 'Sales' section is expanded to 'Shipping Methods', and the 'Flat Rate' shipping method is selected. The configuration for 'Flat Rate' includes a dropdown for 'Country' (set to Argentina), a dropdown for 'Show Method if Not Applicable' (set to No), a text input for 'Sort Order' (set to 0), and a multiselect for 'Allowed For Selected Customer Groups Only'. The 'General' group is selected in the multiselect.

The **Allowed for Selected Customer Groups Only** parameter comes as a check-list of all customer groups available on the store. To add/delete customer groups, proceed to **Customers > Customer Groups**. The [official Magento 2 manual](#) will instruct you on how to do that. Name your custom groups meaningfully, so that later you have meaningful restrictions on shipping.

By default all customer groups are given same rights to all shipping methods. It means that all shipping methods are open to all groups. **When in the default mode,** the list of groups will come inactive, greyed-out, All Groups selected.

To specify the groups which will have access to the chosen shipping method, click on the name of the group. It will then get highlighted in blue. To select multiple groups, press the CTRL button on the keyboard and select as many groups as you need. Multiselect works on mobile devices too.

The **All Groups** option will apply restrictions to all groups presented on the list.

Sample restrictions:

B2C customers will be thankful for discounted or free shipping, **B2B** clients will appreciate alternatives to manage bulky orders and complex delivery needs.

Only those methods of shipping which have been pre-configured herein will feature on the **Checkout page**. Cutting the list short and suggesting selected options for various customer groups will save the time of customers, and will suggest them you know their needs and preferences.

Integrations

The [Magento 2 Company Accounts](#) module allows creating company accounts and assigning them to particular customer groups. Those will be your B2B clients, and thereby they may well need specific shipping and payment methods, different to those of general customers.

The [Magento 2 One Step Checkout](#) extension enhances the native Magento checkout functionality for best user experience. It will feature the specified for the customer shipping and payment methods in its usual, enhanced, way.

Feel free to contact our support team with any questions:

[Submit a help desk ticket](#)

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