

Customer Wise Filter Payment Method for Magento 2



Magento 2.x

Extension User Guide

Official extension page: [Customer wise payment for Magento 2](#)

Introduction: Customer wise filter payment method, based on what payment method was selected. Customer wise Payment method filter extension allow you to filter payment on checkout page by your predefined conditions. It is based on what product customer buy, also module can filter PayPal express button on product page. Here customer can buy any product from online payment method, and there are many types of payment methods for the customer.

Sometimes customer have to face difficulties to getting their product by 'cash on delivery' method, because he/she is related to small town or village, so they can easily choose other method for payment. Also there are the groups of customer related to the particular filter payment method. As we can say the customer who select 'cash on delivery' are in one group and 'net banking' selected customers are in other group.

What Can Admin Do: Here are Some functionalities which can only perform by admin:

- Admin can add and save the customer with their proper details.
- Functionality of the payment method is decided by the admin.
- There is collection of different types of payment methods, which can only enable or disable by the admin from the backend.
- Sometime there are only one type of payment method is enabled and other methods are disabled, and sometime customer can see many types of payment methods and choose one of them.

Methods of payment:

- Bank Transfer Payment
- Cash on Delivery
- Credit Card
- Check/Money order
- PayPal Credit
- Stored Accounts (Braintree PayPal)
- PayPal billing agreement
- Purchase order etc.

Benefits:

- Allow you customer wise filter payment methods and shipping methods by customer groups.
- Functionality of customer wise payment method is decided by the admin.
- You can use the extension and its working fine for customer group and also filter by product.
- Only admin can add the other customer, enable the methods of payment and assign to the particular customer.

➤ Backend Functionality

1. Creation of New Customer

ID	Name	Email	Group	Phone	Country	State/Province	Customer Since	Web Site	Confirmed email	Date of Birth	Action
1	Veronica Costello	roni_cost@example.com	General	(555) 229-3326	United States	Michigan	Aug 28, 2017 9:17:09 AM	Main Website	Confirmation Not Required	Dec 15, 1973	Edit
2	Navneet Goel	navneet@evincdev.com	General				Sep 6, 2017 6:19:29 AM	Main Website	Confirmation Not Required		Edit
3	Test Test	rahul@evincdev.com	General				Sep 6, 2017 11:51:23 AM	Main Website	Confirmation Not Required		Edit

Figure 1 – Creation of New customer

- This is the **backend functionality** from which admin can see the list of customers with their respective **name, email, country, zip code, date of birth** etc.
- Admin can also use mass action to **edit** the details of customer.
- From given option '**Add new customer**' admin can add new desired customer with his/her proper details.

1.1 New customer Account information

The screenshot shows the 'New Customer' form with the following details:

- Form Title:** New Customer
- Navigation:** Back, Reset, Save and Continue Edit, Save Customer
- Section:** Account Information
- Fields:**
 - Associate to Website: Main Website
 - Group: General (dropdown menu open with options: General, Wholesale, Retailer)
 - Prefix: (empty)
 - First Name: Malika
 - Middle Name/Initial: (empty)
 - Last Name: Arora
 - Suffix: (empty)
- Callouts:**
 - 'Admin can add the category of group from dropdown' points to the Group dropdown.
 - 'Enter all the mandaotry fields' points to the First Name, Middle Name/Initial, and Last Name fields.
 - 'Always remember to click on 'save customer' after entering all the details' points to the Save Customer button.

Figure 1.1 – New customer account information

- There are **two types** of information:
 - ✓ Account information and
 - ✓ Address information
- In **account information** you have to enter all the mandatory fields and you can select the category of group from the dropdown
- Remember to click on **'save'** button, after entering all details.

1.1 New customer Account information

The screenshot shows the 'New Customer' form with the following fields and callouts:

- Email ***: Input field with placeholder '@email:'. A callout points to the 'Save Customer' button, stating: "Remember to click on 'save customer'".
- Date of Birth**: Input field with a calendar icon. A callout points to it, stating: "Select the date of birth from the calender".
- Tax/VAT Number**: Input field.
- Gender**: Dropdown menu.
- Send Welcome Email From**: Dropdown menu with 'Default Store View' selected.
- Allowed payment method**: A list of payment methods including 'Bank Transfer Payment', 'Cash On Delivery', 'Check / Money order', and 'Credit Card'. A callout points to this list, stating: "Here admin can assign particular payment method to particular customer, that method will display on frontend view".

Navigation buttons at the top: ← Back, Reset, Save and Continue Edit, and Save Customer.

Figure 1.1 – New customer account information

- From the given option **'Allowed payment method'** admin can **assign** the payment methods to the customer. Customer can see only one filter payment method or collection of many payment methods as per **decided by the admin** for the particular customer.
- Click on **'save customer'** after entering all the details.

1.2 New customer address information

The screenshot shows the 'New Customer' page in Magento 2. On the left, there is a sidebar with 'CUSTOMER INFORMATION' and 'Addresses' sections. The main area displays an address for 'Malika Arora' with fields for Prefix, First Name, Middle Name/Initial, Last Name, and Suffix. A 'Save Customer' button is visible in the top right. Three yellow callout boxes provide instructions: 'Here you can see all the details of address that you have entered', 'You can also add new address from here', and 'Remember to click on 'save customer''.

Figure 1.2 – New customer address information

- This is backend address information in which you have to enter all the **mandatory fields**.
- You can see the details of particular address that you have entered and also **add new address**.
- After entering all the details click on '**save customer**' for saving all the information's.

1.2 New customer address information

New Customer

← Back Reset Save and Continue Edit **Save Customer**

Company
Evince

* Street Address
adani, shantigram

* City
Ahmedabad

* Country
India

State/Province
Gujrat

* Zip/Postal Code
380054

Enter the current address information

Activate Windows
Go to Settings to activate Windows.

Figure 1.2 – New customer address information

- Enter the **current address information**, fill all the mandatory fields and click on 'save customer'.
- All the information of customer will be saved.

1.3 Filter payment method configuration

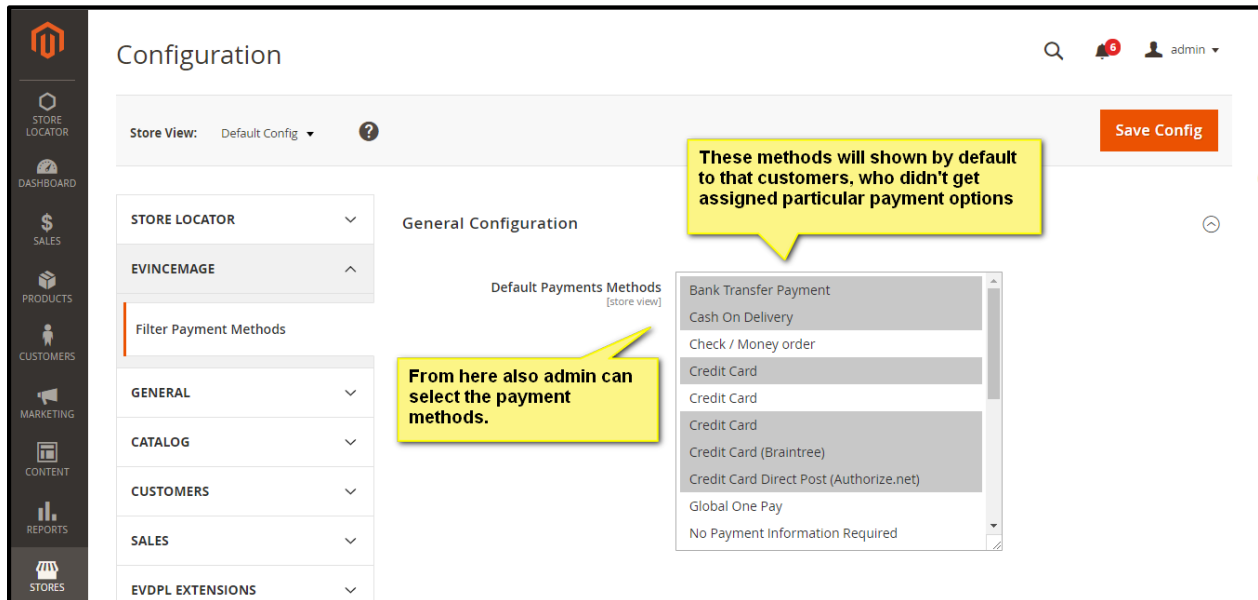


Figure 1.1 – Filter payment method configuration

- Please go to **store>>configuration>>EVDPL>>filter payment methods**
- In general configuration, there are default payment methods from which admin can **enable or disable** the particular method for particular customer.
- Click on **'save configuration'** after you enable the particular payment methods.

➤ Frontend Functionality

1.4 Checkout page payment method

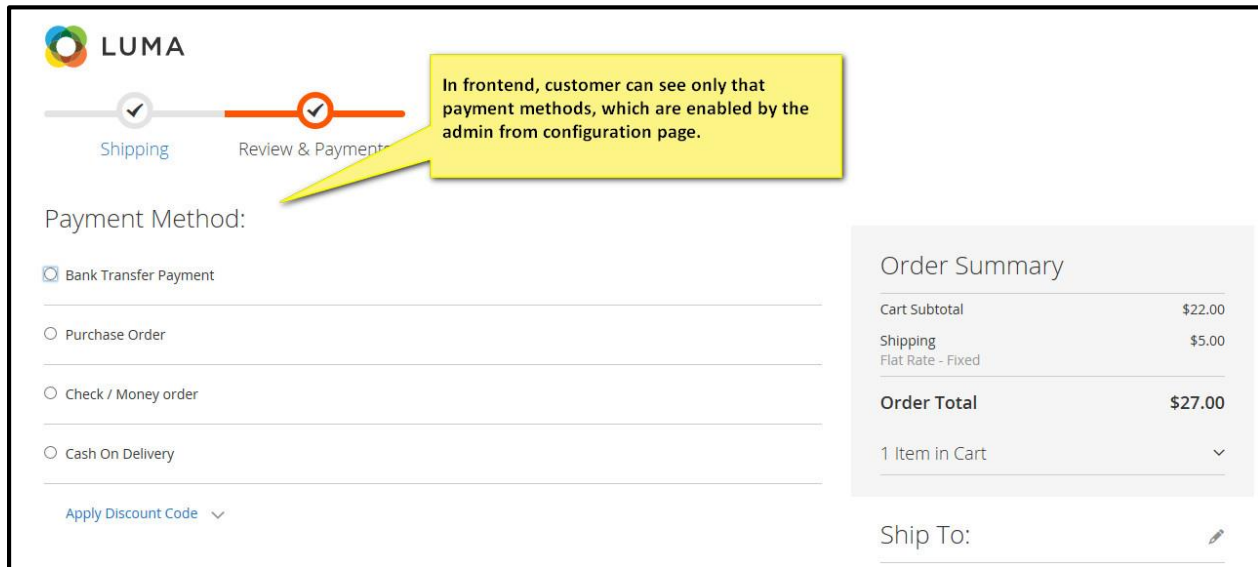


Figure 1.4 – Checkout page payment method

- This is the **Frontend functionality**, if any customer wants to purchase the product then they have to click on **'Add to cart'**. Only then customer should be redirected to the **checkout page**.
- Customer can see only that payment methods which are **enable** by the admin from **configuration page**.
- There can be only **one or more payment methods** for the particular customer as per decided by the admin.

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- Our corporate website <http://www.evdpl.com/>
- Our Magento 2.x extension <http://www.evincemage.com/mage-2.html>
- Our Magento 1.x extension <http://www.evincemage.com/magento-extension.html>
- Our extension support <http://evincemage.com/contacts>

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Thank You