



— **Magento Extension User Guide**

CUSTOMER GROUP PERMISSIONS

for Magento 2



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Key Features

Restrict the products

Every e-Commerce seller has a various set of clients and accordingly different requirements for them. And it can be a situation when a store owner wants to restrict some products for a specific customer group. This extension will allow making necessary product restrictions quickly and properly.

Restrict the categories

The module allows making category restrictions for customer groups. For example, if an admin wants to restrict sale category from "Not Logged In" it's necessary to make only a few clicks and restrictions will be applied.

Payment Method Permissions

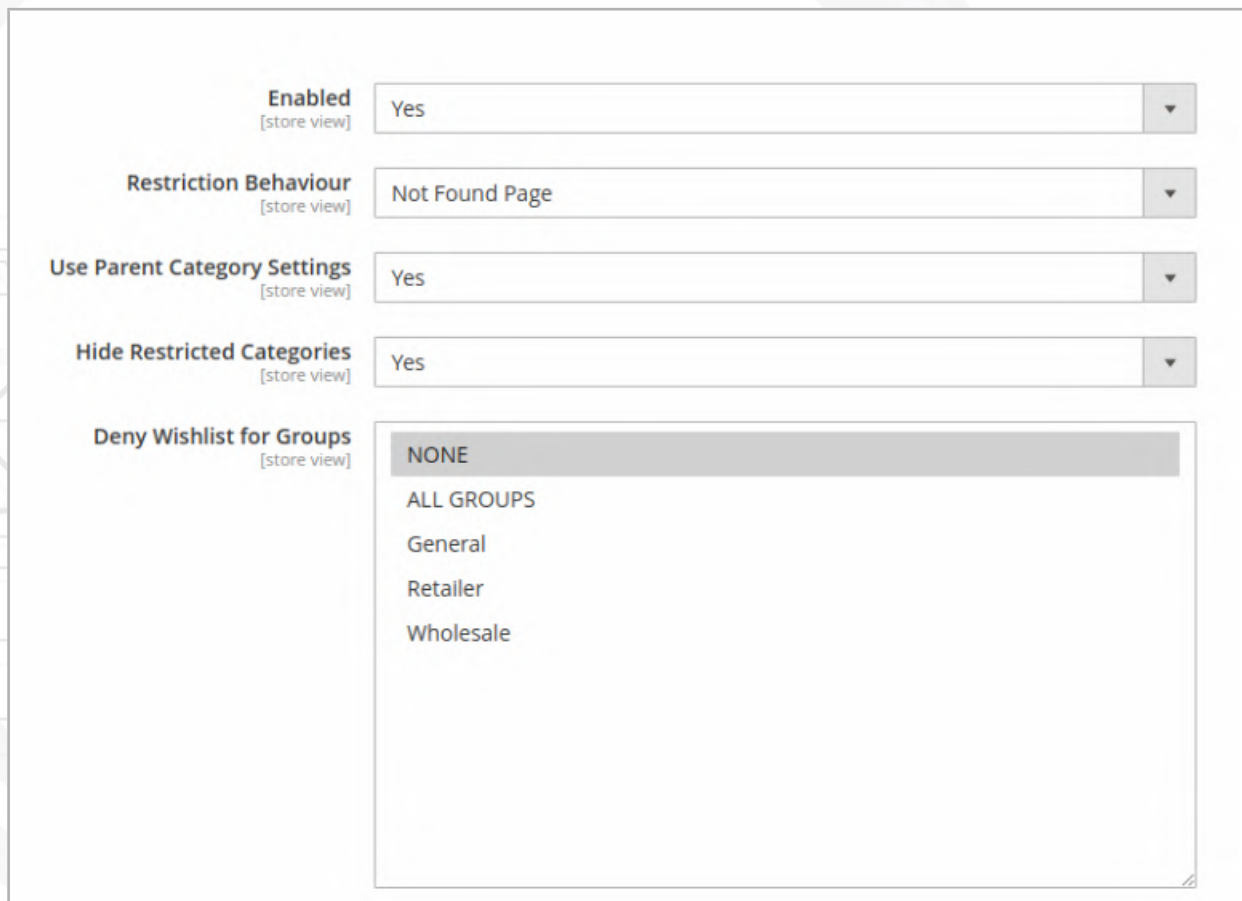
Very often store owners want to restrict some payment methods for specific customer group like store owner has some customer group and want to apply restrictions for specific payment methods. With the help of this extension, an admin can make payment restrictions in a few clicks.

Shipping Method Permissions

Usually, carrier companies propose a list of shipping methods to the customers. The extension allows an admin to restrict only unneeded shipping methods instead of blocking all of them. For example, you can make customer restrictions for Federal Express shipping method.

Configuration

- **Enabled** - To enable the extension select "Yes"
- **Restriction Behaviour - Redirect to Login Page** - if a customer is restricted he will be redirected to login page. **Not Found Page** - if a customer is restricted he will be shown a not found page.
- **Use Parent Category Settings** - This option is for Categories. If you want to apply the group restriction for all parent categories select "Yes".
- **Hide Restricted Categories** - To hide restricted categories select "yes".
- **Deny Wishlist for Groups** - Select for which groups must be wishlist restriction applied. You can restrict adding to the wishlist for customer groups (except guests). An admin can restrict only a concrete group of customers without guests. Magento restricts oneself to add to wishlist (Magento redirects to the login page).



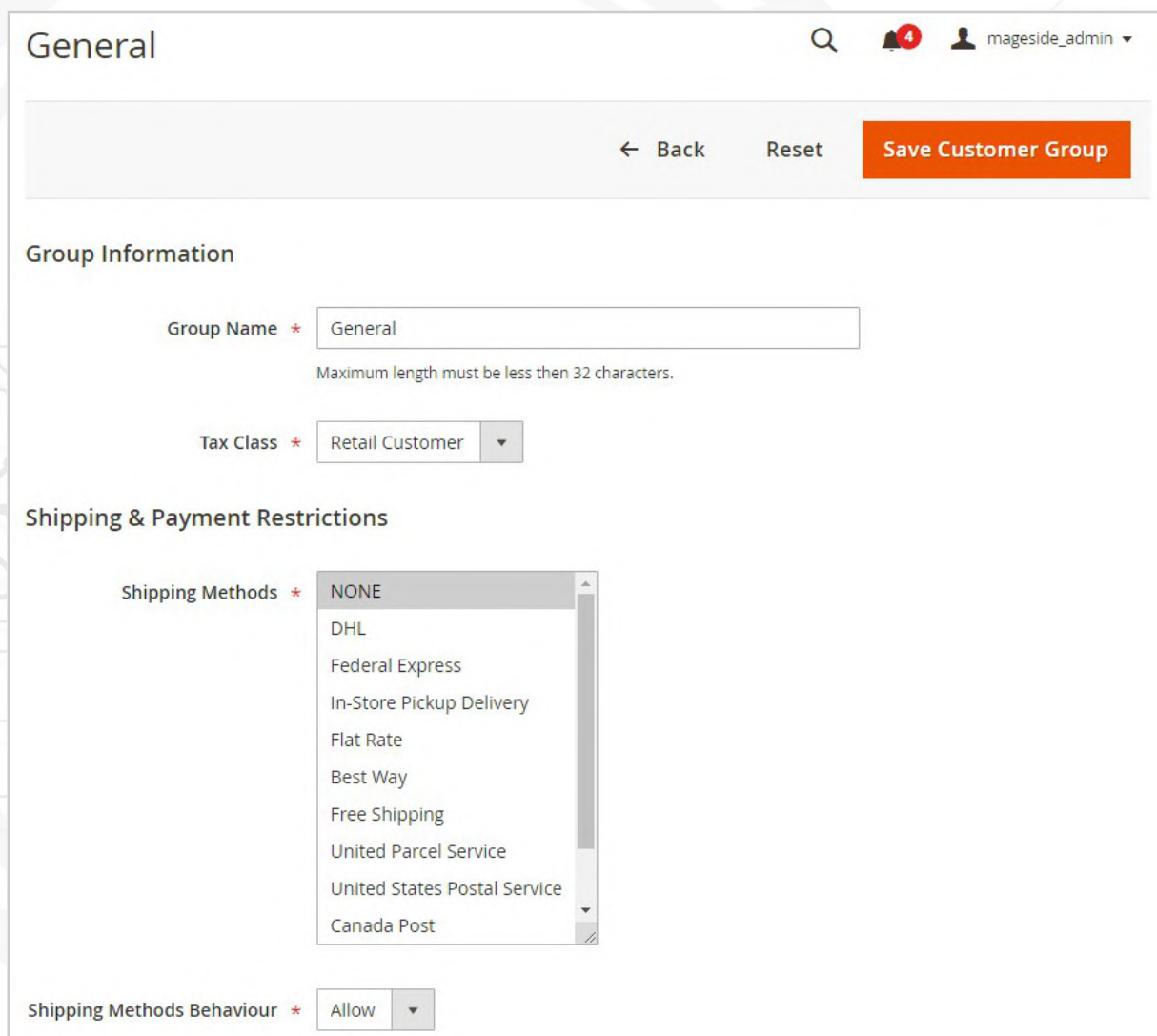
The screenshot shows the configuration interface for the extension. It features five settings, each with a label, a sub-label "[store view]", and a dropdown menu:

- Enabled** [store view]: Set to "Yes".
- Restriction Behaviour** [store view]: Set to "Not Found Page".
- Use Parent Category Settings** [store view]: Set to "Yes".
- Hide Restricted Categories** [store view]: Set to "Yes".
- Deny Wishlist for Groups** [store view]: A list of options including "NONE" (selected), "ALL GROUPS", "General", "Retailer", and "Wholesale".

Customer Groups Configuration

To use the extension right, it's necessary to configure the setting in customer groups configuration. Go to **Customers > Customer Groups > select a necessary customer group or add a new one**

- **Group Name** – type a group name
- **Tax Class** – select a tax class
- **Shipping Methods** – select shipping methods that should be restricted
- **Shipping Methods Behaviour** – select “Allow” to enable the restriction for shipping methods.



General

← Back Reset **Save Customer Group**

Group Information

Group Name *
Maximum length must be less than 32 characters.

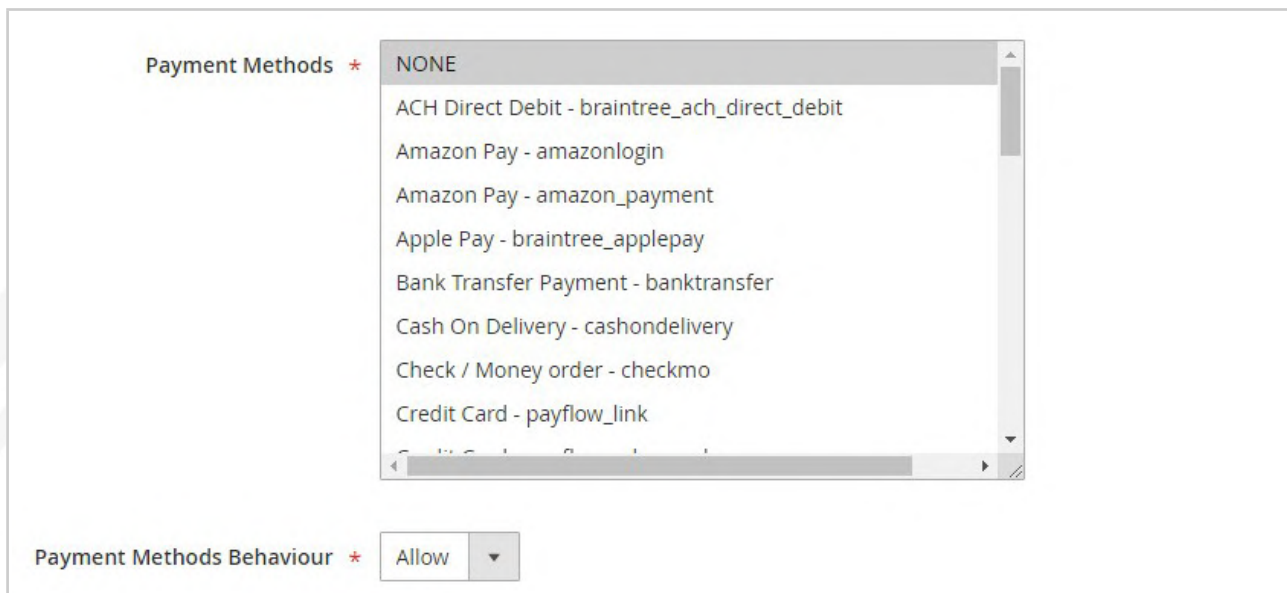
Tax Class *

Shipping & Payment Restrictions

Shipping Methods *
DHL
Federal Express
In-Store Pickup Delivery
Flat Rate
Best Way
Free Shipping
United Parcel Service
United States Postal Service
Canada Post

Shipping Methods Behaviour *

- **Payment Methods** - select payment methods that should be restricted.
- **Payment Methods Behaviour** - select "Allow" to enable the restriction for payment methods.



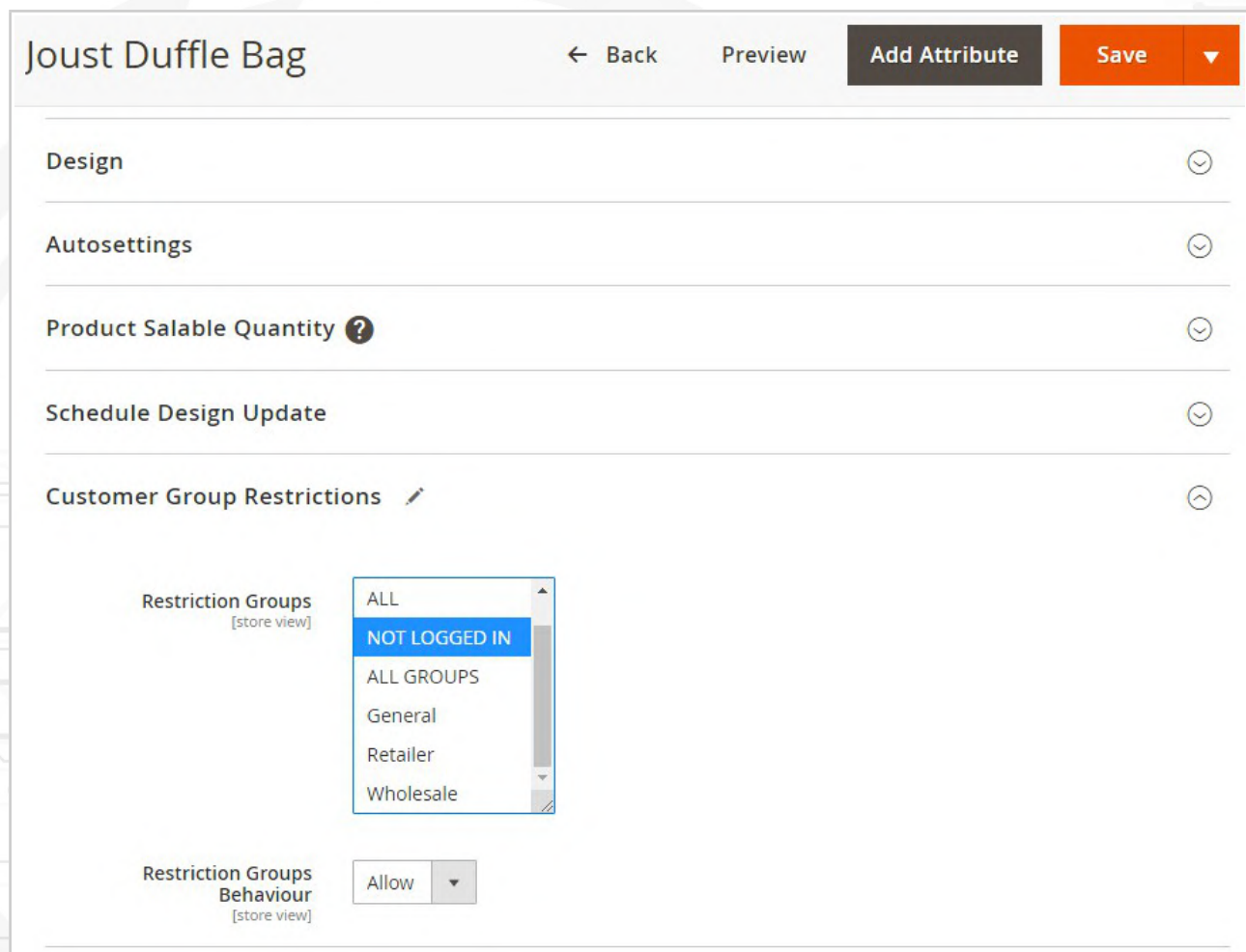
The screenshot shows a configuration interface with two main sections:

- Payment Methods ***: A dropdown menu is open, showing a list of payment methods. The selected option is "NONE". The list includes:
 - ACH Direct Debit - braintree_ach_direct_debit
 - Amazon Pay - amazonlogin
 - Amazon Pay - amazon_payment
 - Apple Pay - braintree_applepay
 - Bank Transfer Payment - banktransfer
 - Cash On Delivery - cashondelivery
 - Check / Money order - checkmo
 - Credit Card - payflow_link
- Payment Methods Behaviour ***: A dropdown menu is set to "Allow".

Products Restriction

To restrict the product for a specific customer group go to **Catalog > Products > select a necessary product > click "Edit" > scroll down the page up to the section "Customer Group Restrictions" > specify the restriction group > click "Save"**

- **Restrictions Groups** – select restriction group that should be restricted.
- **Restriction Groups Behaviour** – select "Allow" to enable the restriction for a product.

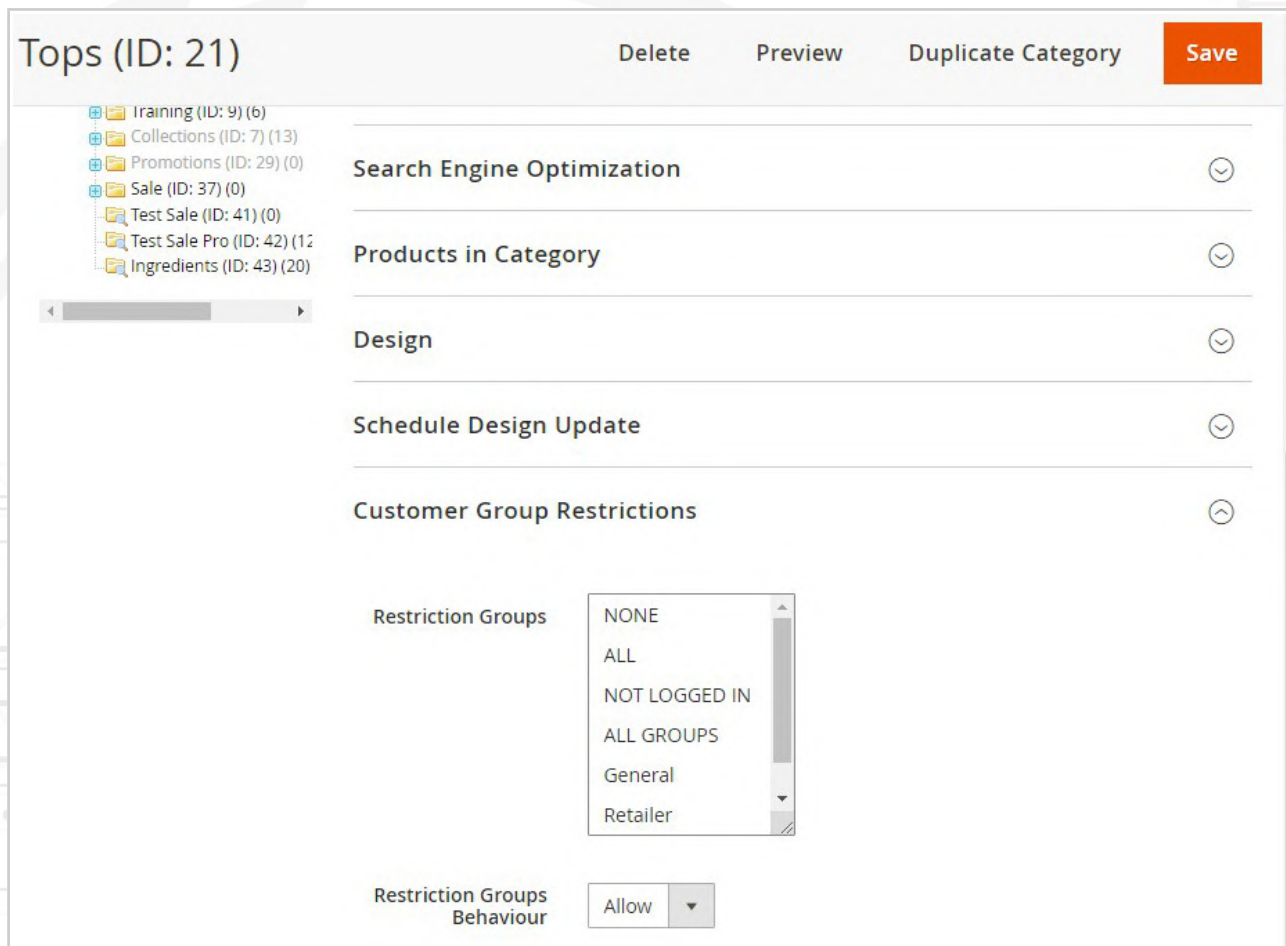


The screenshot shows the 'Joust Duffle Bag' product edit page. At the top, there are navigation buttons: 'Back', 'Preview', 'Add Attribute', and 'Save'. Below these are several sections: 'Design', 'Autosettings', 'Product Salable Quantity', 'Schedule Design Update', and 'Customer Group Restrictions'. The 'Customer Group Restrictions' section is expanded, showing a dropdown menu for 'Restriction Groups' with options: 'ALL', 'NOT LOGGED IN', 'ALL GROUPS', 'General', 'Retailer', and 'Wholesale'. Below this, there is a 'Restriction Groups Behaviour' dropdown set to 'Allow'.

Categories Restriction

To restrict the category for a specific customer group go to **Catalog > Categories > select a necessary category > scroll down the page up to the section "Customer Group Restrictions" > specify the restriction group > click "Save"**.

If you want to apply the restrictions for parent categories go to Configuration Panel and in the field "Use Parent Settings" select "Yes".

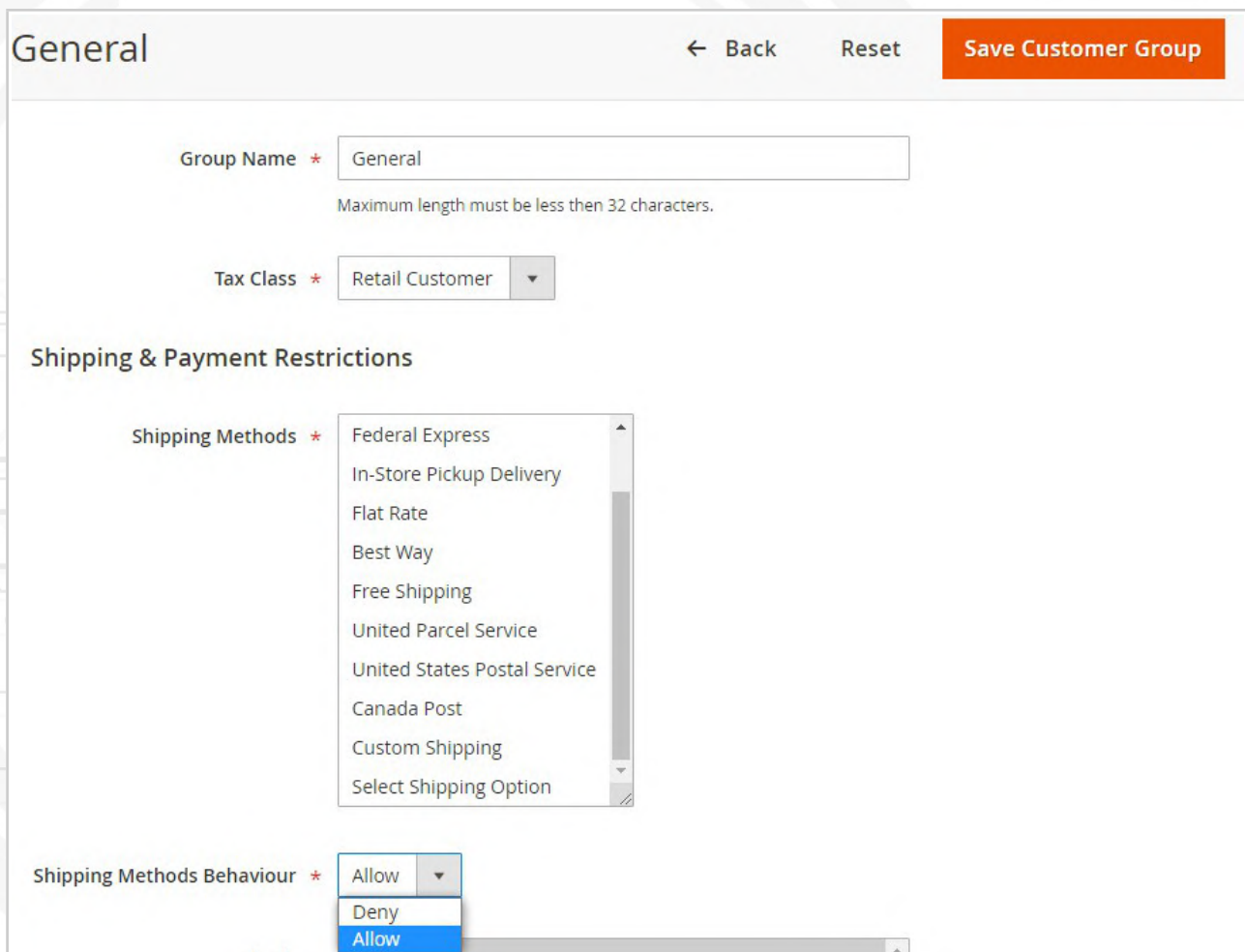


The screenshot displays the configuration interface for a category named 'Tops (ID: 21)'. At the top right, there are buttons for 'Delete', 'Preview', 'Duplicate Category', and a prominent orange 'Save' button. On the left side, a tree view shows the category hierarchy: Training (ID: 9) (6), Collections (ID: 7) (13), Promotions (ID: 29) (0), Sale (ID: 37) (0), Test Sale (ID: 41) (0), Test Sale Pro (ID: 42) (12), and Ingredients (ID: 43) (20). The main content area lists several categories with expandable arrows on the right: Search Engine Optimization, Products in Category, Design, Schedule Design Update, and Customer Group Restrictions. The 'Customer Group Restrictions' section is expanded, showing a 'Restriction Groups' dropdown menu with options: NONE, ALL, NOT LOGGED IN, ALL GROUPS, General, and Retailer. Below this, the 'Restriction Groups Behaviour' is set to 'Allow'.

Shipping Method Permission

To restrict a shipping method for a specific customer group go to **Customer (in older Magento versions (till ver. 2.2) "Stores") > Customer Groups > select a necessary customer group > select which shipping methods should be restricted > click "Save Customer Group"**.

- **Shipping Methods** – select what shipping methods should be restricted.
- **Shipping Methods Behaviour** – to allow shipping group restrictions select "Allow",

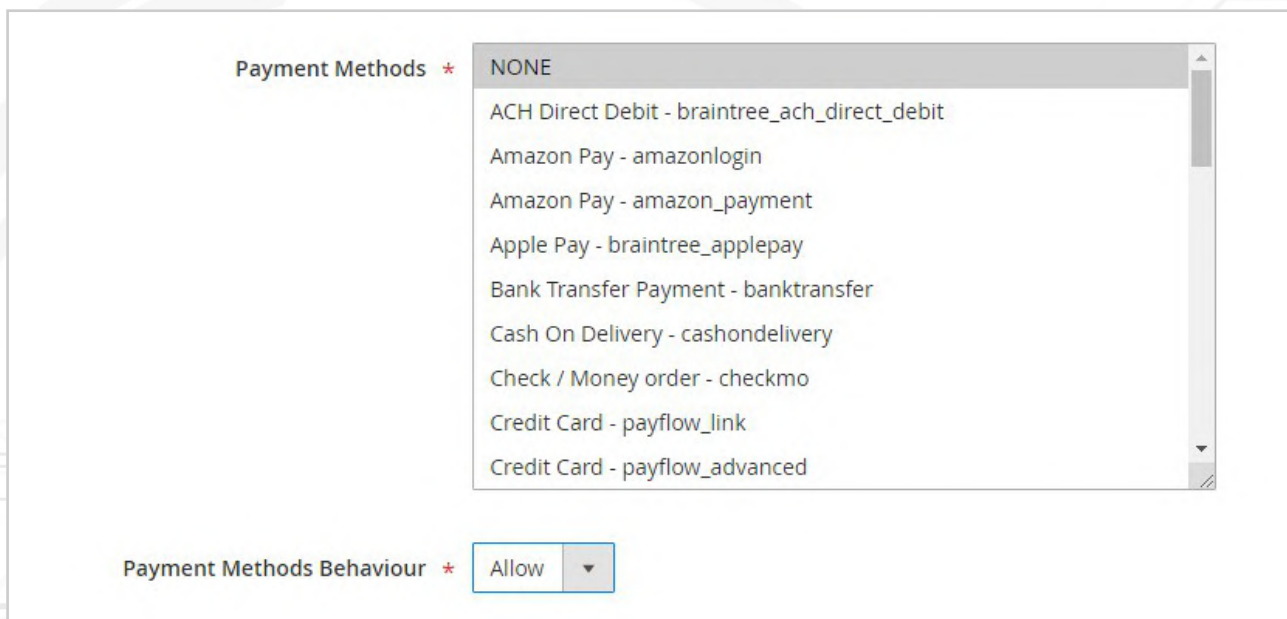


The screenshot shows the 'General' configuration page for a customer group. At the top right, there are navigation buttons: 'Back', 'Reset', and 'Save Customer Group' (highlighted in orange). The 'Group Name' field is set to 'General' with a note: 'Maximum length must be less than 32 characters.' The 'Tax Class' dropdown is set to 'Retail Customer'. The 'Shipping & Payment Restrictions' section is expanded, showing a list of shipping methods: Federal Express, In-Store Pickup Delivery, Flat Rate, Best Way, Free Shipping, United Parcel Service, United States Postal Service, Canada Post, Custom Shipping, and Select Shipping Option. The 'Shipping Methods Behaviour' dropdown is set to 'Allow', with 'Deny' also visible in the dropdown menu.

Payment Method Permission

To restrict a payment method for a specific customer group go to **Stores > Customer Groups > select a necessary customer group > select which payment methods should be restricted > click "Save Customer Group"**.

- **Payment Methods** - select payment methods which should be restricted.
- **Payment Methods Behaviour** - to allow payment methods restriction select "Allow",



Payment Methods *

- NONE
- ACH Direct Debit - braintree_ach_direct_debit
- Amazon Pay - amazonlogin
- Amazon Pay - amazon_payment
- Apple Pay - braintree_applepay
- Bank Transfer Payment - banktransfer
- Cash On Delivery - cashondelivery
- Check / Money order - checkmo
- Credit Card - payflow_link
- Credit Card - payflow_advanced

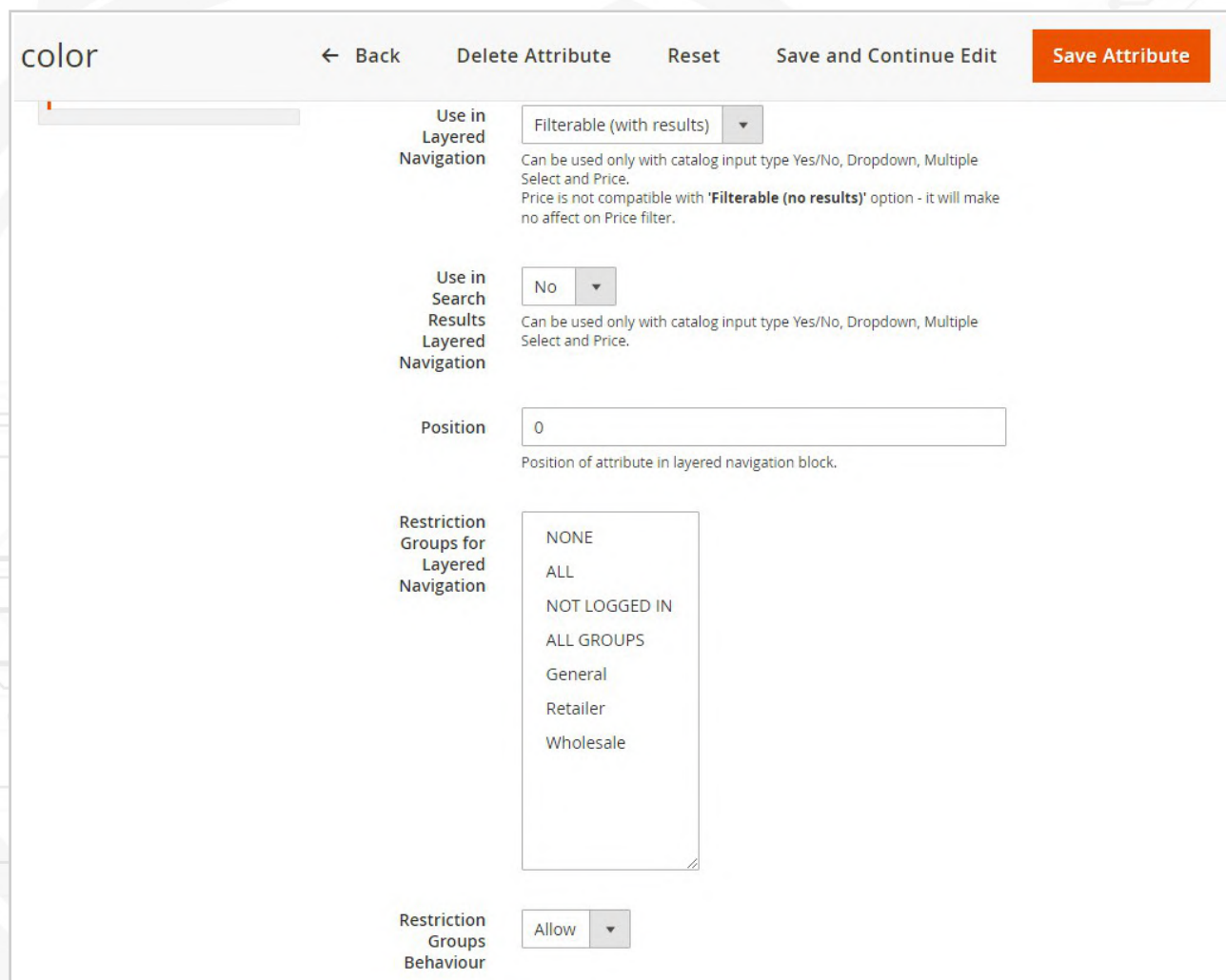
Payment Methods Behaviour *

Allow

Product Attributes Permission

To restrict product attribute for a specific customer group go to **Stores > Attributes - Product > select a necessary attribute > click "Storefront Properties" > apply the restrictions in the sections "Restriction Groups for Layered Navigation" and "Restriction Groups Behaviour" > click "Save Attribute"**.

- **Restriction Groups for Layered Navigation** - select what restriction groups should be restricted.
- **Restriction Groups Behaviour** - to enable restrictions select "Allow".



The screenshot shows the configuration page for the 'color' attribute. At the top, there are navigation buttons: 'Back', 'Delete Attribute', 'Reset', 'Save and Continue Edit', and a prominent orange 'Save Attribute' button. The main content area is divided into several sections:

- Use in Layered Navigation:** A dropdown menu is set to 'Filterable (with results)'. Below it, a note states: 'Can be used only with catalog input type Yes/No, Dropdown, Multiple Select and Price. Price is not compatible with **Filterable (no results)** option - it will make no affect on Price filter.'
- Use in Search Results Layered Navigation:** A dropdown menu is set to 'No'. Below it, a note states: 'Can be used only with catalog input type Yes/No, Dropdown, Multiple Select and Price.'
- Position:** A text input field contains the value '0'. Below it, a note states: 'Position of attribute in layered navigation block.'
- Restriction Groups for Layered Navigation:** A list box contains the following options: NONE, ALL, NOT LOGGED IN, ALL GROUPS, General, Retailer, and Wholesale.
- Restriction Groups Behaviour:** A dropdown menu is set to 'Allow'.



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Mageside is a team of developers dedicated to Magento installation, support, extension creation and advanced customization. We are good at doing the heavy lifting, and there is no Magento project that is out of scope on a technical basis.

Mageside does full site conversions, Magento 2 upgrades, advanced extension development, deep systems integration and all the other fun stuff. Our code is incredibly clean, we are on first name basis with several of the core devs, and love every opportunity to create another fine expression of ecommerce. If you need the best, let us work on your next project.