

# Purchase Limit Rules

Purchase limit rules feature to set maximum purchase limits on B2B accounts. Limits can be made based on specific products, product types, static categories, or attributes in addition to a specific B2B account or customer segment.

B2B orders will be held in a Pending Shipment state for a period of time before being "[released](#)" for fulfillment. Orders are validated against your configured purchase limits at the time of release. If an order is placed that surpasses the allowed limit, then the excess item quantity will be cancelled when orders are released for fulfillment. An Item Cancelled notification will be sent to the customer if enabled [in your order email settings](#).

## Purchase Limit Rule Criteria

Purchase limit rules are based on expressions called product and customer rules, at least one of which is required to create a rule. These are made up of a set of conditions that can be used with logical operators like OR or AND, such as in a product rule of "Color = Blue AND Brand = Adidas" that would restrict the purchase limit rule to products that fit those conditions.

Product rules can be based on product type, code, variant, static category, attribute, and some other first class fields. Customer rules can be based on either a customer account or customer segment. If neither is provided, the rule will apply to all customers and customer segments.

Examples:

- If B2B Account = Walmart and Product = Shirt, then there is a maximum quantity of 150 per order.
- If B2B Segment = VIP and Product Category = Apparel, then there is a maximum quantity of 250 per order.



OMS-Only implementations require a catalog in order to use purchase limit rules.

## Enable Purchase Limit Rules

Contact to enable this feature.

The following behaviors allow [users](#) to view and update purchase limit rules. The Admin and SuperAdmin roles have these behaviors by default.

- Product Rule
  - Product Rule Read, Product Rule Create, Product Rule Update, Product Rule Delete
- Customer Rule
  - Customer Rule Read, Customer Rule Create, Customer Rule Update, Customer Rule

Delete

- Purchase Limit Rule
  - Purchase Limit Rule Read, Purchase Limit Rule Create, Purchase Limit Rule Update, Purchase Limit Rule Delete

## Configure Order Rules

To toggle on and configure B2B order release based on your rules:

1. Go to **System > Settings > General > Site**.
2. Scroll down to Fulfillment Settings and toggle on **Enable configurable shipment release**. This is what allows orders to be held in the [Pending Shipment state](#) before being released for fulfillment.
3. Enter an integer between 1-7200 in **Release orders \_ mins after order submit**. This is required whenever configurable shipment release is enabled.
4. Ensure that **Reserve inventory when order status is PendingShipment** is disabled, otherwise B2B order rules will not be available.
5. Enable **B2B Order Rules**.

☒ Enable configurable shipment release

Release orders  mins after order submit ⓘ

☐ Reserve inventory when order status is PendingShipment ⓘ

☒ B2B Order Rules ⓘ

☒ Manually release orders ⓘ

☐ Automatically release orders every  mins ⓘ

6. Select whether you want to **Manually release orders** (the default behavior that requires Admin users to [initiate release of orders for fulfillment](#)) or **Automatically release orders every \_ mins** and enter a value (in which orders will be released for fulfillment at the configured interval). This will be the method in which orders are released based on rules. Any orders that are not released as part of B2B Order Rules will be released according to the **Release orders \_ mins after order submit** setting instead.
7. Click **Save**.



Enabling B2B Order Rules also allows you to determine the order in which B2B orders are released [based on account priority](#). This is not required, but may be configured if

you want to further fine-tune your B2B fulfillment process.

## Configure Purchase Limit Rules

To configure a purchase limit rule:

1. Go to **Main > Orders > Purchase Limit Rules**.
2. Select a **Site** to view its existing rules.
  - If you choose to create a new rule, clicking the button directly will create a rule for the current site. Expand the drop-down menu on the Create button to select a different site instead.
  - When creating rules via this UI, a rule can only be applied to one site. If you want to assign a rule to multiple sites, create or update it via the [Purchase Limit Rule APIs](#) instead.
3. Click **Create Purchase Limit Rule** or click an existing rule in the table.
  - If you choose to create a new rule, clicking the button directly will create a rule for the current site. Expand the drop-down menu on the Create button to select a different site instead.
4. Enter a **Code**. If not provided, the system will generate one automatically.
5. Enter a **Name**.
6. Enter an optional **Description**.

## Update Limit Rule

Selected Site - Example\_Site

Code

190225

Name \*

PS4 Purchase Limit

Description

Updated with multiple Sites

### QUERY

\*Note: At least one product rule or one customer rule is required to set up a purchase limit rule

▼ Select Product Rule

MASTER CATALOG: Test\_MM

▼

Electronics\_product\_rule

✕ ▼

 Edit Selected Product Rule

 Create New Product Rule

▼ Select Customer Rule

Electronics\_customer\_rule

✕ ▼

 Edit Selected Customer Rule

 Create New Customer Rule

▼ Max Quantity

100

7. Select or create at least one product rule or customer rule.
  - Creating or editing a rule will open an expression editor that you can view in Query, JSON, or Text format. Here you can define one or more conditions by entering a product property, logical operator, and value to compare the property against and grouping them as needed. Click **Preview** to view a list of records that would be impacted by the expression.

The screenshot shows a rule configuration window with three tabs: **QUERY**, **JSON**, and **TEXT**. The **QUERY** tab is selected. In the top right corner, there is a **Preview** button. Below the tabs, there is a dropdown menu showing **AND** and **OR** options, with **OR** currently selected. To the right of these options are two buttons: **+ Add Condition** and **+ Add Group**. Below these, there are two rows of conditions. The first row shows **Product Code** (with a dropdown arrow) **is equal to** (with a dropdown arrow) **ABC** (with a dropdown arrow) and a close button **X**. The second row shows **UPC** (with a dropdown arrow) **is equal to** (with a dropdown arrow) **ABCDE** (with a dropdown arrow) and a close button **X**. At the bottom right of the window, there are two buttons: **Cancel** and **Save**.

- Product and customer rules cannot be shared across any other rule features, such as [return rules](#). This means that only those that were created as part of purchase limit rules will be available here.
- 8. Enter the **Max Quantity** that can be purchased.
- 9. Click **Save**.
- 10. Once a purchase limit rule is created, it is assigned the lowest rank. You can change this on the dashboard shown below.

## Manage Purchase Limit Rules

The dashboard at **Main > Orders > Purchase Limit Rules** displays all existing rules and allows you to manage them with the below actions:

- Toggle the **Status** icon on a specific rule to activate or deactivate it.
- Expand the actions menu on a specific rule to **Edit** or **Delete** it.
- Check multiple rules and then use the **Actions** menu in the top right to delete, enable, or disable them.
- Edit the **Rank** of a rule or click and drag it to reorder them. When the rules are run, they will always be applied in order of the highest to lowest rank (with 1 being the highest rank).
  - Ranks are unique per rule across all sites in the master catalog. This means that if a rule is ranked #1 and only assigned to one site, then all other sites will not display a rule in the #1 rank position. If that rule is assigned to multiple sites, it will be ranked #1 on each assigned site and the sites it is not assigned to will not display a rule in the #1 position. If a rule needs to have a different rank on two different sites, then it should be created twice and a different unique rank should be assigned to each.

- Click **Test Rule** to open a sidebar and enter a product with a customer or customer segment. The system will evaluate which rule affects that case and display it with its rank and maximum quantity, as well as a link to view or update the rule configurations.

Purchase Limit Rules

Create Purchase Limit Rule

site: Example\_Site

								Test Rules	⊙ Actions	⌵
<input type="checkbox"/>	Rank	Code	Name	Created On	Created By	Max Quantity	Status	⋮		
<input type="checkbox"/>	<div><div></div><div>1</div></div>	190225	TV Purchase Limit	2025-02-19T14:20:47.723Z	Admin	200	<input checked="" type="checkbox"/>	⋮		
<input type="checkbox"/>	<div><div></div><div>2</div></div>	42	Example Limit Rule	2025-02-19T14:42:58.653Z	Admin	299	<input type="checkbox"/>	⋮		
<div>⏪ &lt; 1 &gt; ⏩</div>								Displaying 1 - 2 of 2		