

Step-by-Step Guide, Shipping

Follow these instructions to set up your site with shipping methods and rate calculations. Before you do this you should have at least one product entered into your site.

Adding a Shipping Method

- ?? In your site manager, go to 'Sales'.
- ?? From the sub-navigation on the left, select 'Regions'.
- ?? From the expanded sub-navigation on the left, select 'Shipping methods'.



Click the 'add' button.

A method will have been added and it will have automatically been assigned the name 'new shipping name'.

Highlight the words 'new shipping name' and type in the name of the delivery method you would like to use. For our example, we will use 'UPS Regular' as the name of our first shipping method.

Click the 'update' button.

We have now created a 'shipping method'. The next step is to assign this method to a particular region (generally defined as a province or state) and associate a calculation method with that method for a particular region.

Adding a Shipping Method to a Region



From the navigation on the left of the screen, select 'Shipping rates'.

To assign a rate to a method we must first select a region to work with. It is not necessarily important which region you select as long as the shipping method you have created will actually be offered to customers in that region! For our example, we will select 'Alberta' and click the 'edit' button.

The Alberta region detail screen will appear. At the top of this page will be the name, abbreviation and country assignment for Alberta. You may change these if you wish, but for the purpose of setting up shipping it should be left alone. Next on the screen will be the default taxes assigned to the region (or others if you have already added your own taxes).

By default, all Canadian and US regions have some relevant tax information included to get you started. We would recommend you not change the tax details at this time, though you can have tax calculated on your shipping rates for this region by selecting the checkbox under 'Tax Shipping' and clicking the update button.



At the bottom of the screen is an area to assign available shipping methods. You will see the words 'Add Method' beside a drop-down list and 'add' button.

Select the shipping method name you created earlier (it should be the only one available) and click the 'add' button.

This will assign the 'UPS Regular' method in our example to Alberta; meaning consumers from Alberta will have the option of shipping using UPS Regular. We must now assign a rate calculation type and the calculation formula to this method for this region.

Adding a Shipping Rate Calculation

There are 3 different types of rate calculations that can be assigned for each method. Once you have selected your preferred calculation type and added some values for your first region, you can proceed to the 'How to Add Rate Methods to Other Regions' section.

Use Ground Weight

This calculation method (default and most common) allows you to assign a base charge dollar value that will be added to any order selecting this delivery method. You must assign a numeric value to this field (zero is accepted). You cannot enter any special characters (\$, ¢).

This method also allows for an additional calculation based on the ground weight of each product, which is entered when adding a new product. This additional calculation is called the weight multiplier. The weight multiplier is multiplied by the ground weight and then added to the base charge to form the complete shipping charge. For example, if you have a product (product z) with a ground weight of 1 (the unit of measurement is not important as long as it is consistent throughout your inventory) and you have created the shipping method UPS Regular to Alberta to have a \$10 base charge and weight multiplier of 2 then the system will calculate shipping for an order with product z as \$12 (base charge + [weight multiplier x ground weight]) (\$10 + [2 x 1]).

To use the 'Ground Weight' calculation, add base charge and weight multiplier values and click the 'update' button beside those values.

Use Dimensional Weight

Dimensional weight is a standard formula used throughout the air-freight industry that considers density when determining charges. The calculations are used to consider the amount of space a package will take up on an aircraft in relation to the actual weight of the package.

If you are using dimensional weight, ensure that you have entered a width, height and weight for each product and, using your shipping companies dimensional weight calculation, enter the dimensional weight value.

To use the dimensional weight calculation, click the radio button beside 'Use Dimensional Weight' and click the 'update' button right beside it then enter your base charge and weight multiplier and click the 'update' button beside those values.

Use Price Table

This calculation method allows you to define flat rate shipping charges based on the total order value. You create ranges of dollar amounts, and then assign a flat shipping charge in dollars for any orders within your range of dollar amounts. You can create as many dollar ranges as you like.

To use the price table calculation, click the radio button beside 'Use Price Table' and click the 'update' button right beside it. You will see some new fields replace the base charge and weight multiplier fields as in the picture below.

From	to	Charge	
00	100	10	Update

[Ship rates](#)

Each price table must start with zero (.00) and you will see that in the 'From' field this value is grayed out and is not editable.

To create your first range, add a dollar amount (numeric values only) in the 'to' field. In the example above we have entered 100. This range represents the shipping charge for all orders that have a pre-tax and pre-shipping value between \$0 and \$100. To specify the charge for orders in this range simply type the dollar value in the 'Charge' field and click the 'update' button. You will see additional fields appear as below.

From	to	Charge		
00	100.00	10.00	Update	
100.01	9999999999	.00	Update	Delete

[Ship rates](#)

Notice that the next range automatically starts with your ending value from the previous line, plus 1 cent. The 'to' field is populated with the maximum allowable value for the rate calculation. You can continue to add ranges by

editing the 'to' field by highlighting all of the '9's' and replacing them with the value of your choice then adding a 'Charge' for the range. Remember, you must click the 'update' button each time you add a new value. When you have added all of the ranges you need, leave the last 'to' field with the '9's', add your final charge value and click update. The completed price table below offers customers' free shipping on orders over \$500.

Update Successful

Alberta AB [3] Canada

[Up](#)

UPS Regular [1]

Enabled

Use Ground Weight
 Use Dimensional Weight
 Use Price Table

Update Delete

From	to	Charge		
00	100.00	10.00	Update	
100.01	200.00	15.00	Update	Delete
200.01	300.00	20.00	Update	Delete
300.01	400.00	25.00	Update	Delete
400.01	9999999999	.00	Update	Delete

[Ship rates](#)

How to Add Rate Methods to Other Regions

Once you have finished creating the rate calculation for your first region, you have the option to assign this method and/or its calculations to other regions.

For our example, let's assume we chose to use the ground weight method in the previous example for Alberta (we chose a \$10 base charge and a weight multiplier of 2). Let's also assume that we plan to use the exact same calculation for all provinces in Canada.

To get started, click the 'Ship rates' link at the bottom of the rate screen (this link is always located directly below your calculation values regardless of the calculation method chosen).

Base Charge	Weight Multiplier	
10.00	2.00	<input type="button" value="Update"/>

You will see the detail screen below.

[Ship rates](#)

The ship rates screen shows the calculation method and values at the top of the screen then lists the regions that use this rate calculation. In our example, Alberta is the only region using the UPS Regular shipping method.

There is a checkbox beside the method and buttons to the right to enable, disable or remove a shipping method from a region.

To apply this rate calculation to other regions, first select the method from the drop down list. All available shipping methods created will be on this list.

To select the regions to apply the shipping method to, in our example all of Canada, check the box beside Canada. All regions will be highlighted in blue. You can also click on an individual region. To select multiple regions, hold down the CTRL key while you click on the desired regions. To unselect a highlighted region, click on it while holding down the CTRL key. Click the 'apply' button once you have selected all of the desired regions.

The ship rates screen will now show all of the regions using the assigned method.

Base Charge		Weight Multiplier	
10.0000		2.0000 Ground Weight	

used by			
Region	Methods	Enabled	
Canada			<input type="button" value="Enable checked"/>
Alberta [3]	<input type="checkbox"/> UPS Regular	Yes	<input type="button" value="Disable checked"/>
			<input type="button" value="Remove checked"/>

Apply above rate to regions

Select A Shipping Method: Select region(s): Canada

- Ontario
- Prince Edward Island
- Quebec
- Saskatchewan
- Yukon
- United States
 - Alabama
 - Alaska
 - Arizona
 - Arkansas
 - California
- Other

processed 13 records

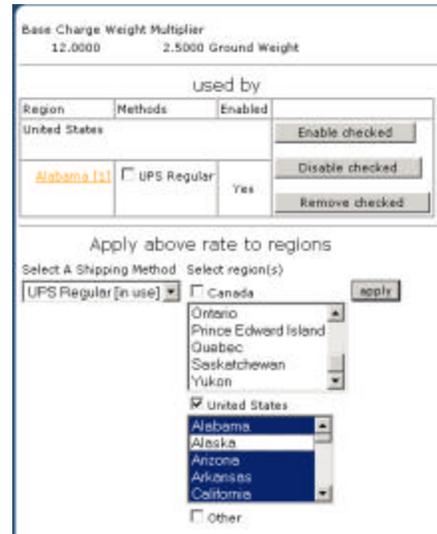
Base Charge		Weight Multiplier	
10.0000		2.0000 Ground Weight	

used by			
Region	Methods	Enabled	
Canada <input type="checkbox"/>			<input type="button" value="Enable checked"/>
Alberta [3]	<input type="checkbox"/> UPS Regular	Yes	<input type="button" value="Disable checked"/>
British Columbia [7]	<input type="checkbox"/> UPS Regular	Yes	<input type="button" value="Remove checked"/>
Manitoba [25]	<input type="checkbox"/> UPS Regular	Yes	
New Brunswick [35]	<input type="checkbox"/> UPS Regular	Yes	
Newfoundland [40]	<input type="checkbox"/> UPS Regular	Yes	
Northwest Territories [43]	<input type="checkbox"/> UPS Regular	Yes	
Nova Scotia [44]	<input type="checkbox"/> UPS Regular	Yes	
Manusot [45]	<input type="checkbox"/> UPS Regular	Yes	
Ontario [48]	<input type="checkbox"/> UPS Regular	Yes	
Prince Edward Island [51]	<input type="checkbox"/> UPS Regular	Yes	
Quebec [53]	<input type="checkbox"/> UPS Regular	Yes	
Saskatchewan [55]	<input type="checkbox"/> UPS Regular	Yes	
Yukon [61]	<input type="checkbox"/> UPS Regular	Yes	

For our next example, we will be adding the UPS Regular shipping method that we created to all of the US states, but using a different rate calculation.

Begin by click on 'Shipping rates' in the left navigation. A summary of all shipping methods broken down by calculation method will be displayed with the number of regions using that method. Select one of the US states from the drop down list and click the 'edit' button. In our example we have selected Alabama and then selected UPS Regular from the 'Add Method' drop down list and clicked the 'add' button.

Enter the base charge and weight multiplier for the regions you will be assigning this calculation to. In our example, we are charging a \$12 base charge and a weight multiplier of 2.5 to reflect higher shipping costs to the US using the UPS Regular shipping method. Click update once you have added the values and then click the 'Ship rates' link at the bottom of the screen to apply the rate to other regions.



Select the shipping method from the drop-down list and select the regions to apply it to, in our example we have selected all of the US by checking the box beside United States. We decided to add a higher rate for this method to Alaska, so we held down the CTRL key and clicked on Alaska to unselect it. Remember to click the 'apply' button once you have selected all of your regions. You can have a different rate calculation for each region associated to any given shipping method by repeating these steps.

To view a summary of your regions and the shipping methods and rates associated with each, click on 'Management' in the left navigation area.



	Shipping methods (show detail)	Taxes (show detail)
Canada (13 Regions)		
Alberta [3]	1	1
British Columbia [7]	1	2
Manitoba [25]	1	2
New Brunswick [35]	1	1
Newfoundland [40]	1	1
Northwest Territories [43]	1	1
Nova Scotia [44]	1	1
Nunavut [45]	1	1
Ontario [48]	1	2
Prince Edward Island [51]	1	1
Quebec [53]	1	1
Saskatchewan [55]	1	2
Yukon [68]	1	1
United States (52 Regions)		
General Area (1 Regions)		

Clicking on the number of regions beside a country or area name will collapse or expand the regions for that country. You can click on an individual region to view, edit or add new shipping methods to that region.

The ID numbers in [brackets] following each region name are assigned by the software for reference.

You can also click on the 'show detail' link under the shipping methods column to show method rate details and the 'hide detail' link to hide them again.

	Shipping methods (show detail)	Taxes (show detail)
Canada (13 Regions)		
United States (52 Regions)		
General Area (1 Regions)		

[Add Region](#)

Shipping methods (show detail)			
Canada (13 Regions)			
Name	Base Charge	Weight Multiplier	
Alberta [3]	UPS Regular [1] [Active]	10.00	2.00 Ground Weight
British Columbia [7]	UPS Regular [1] [Active]	10.00	2.00 Ground Weight
Manitoba [25]	UPS Regular [1] [Active]	10.00	2.00 Ground Weight