

Basket Weight and Region Automatic

Shipping by Weight and Region

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Introduction

The 'Basket Weight and Region Automatic' delivery calculates the delivery cost for the products in the customer's shopping basket. It does this by automatically selecting the delivery region based on the delivery address post code. This minimises the need for multiple shipping methods. Shipping by weight and region improves the basket flow for the customer.

This guide has been prepared to assist the merchant with setting up and managing this delivery method. We strongly recommend that you read this entire guide before setting up the 'Basket Weight and Region Automatic' delivery method for your online shop.

Features

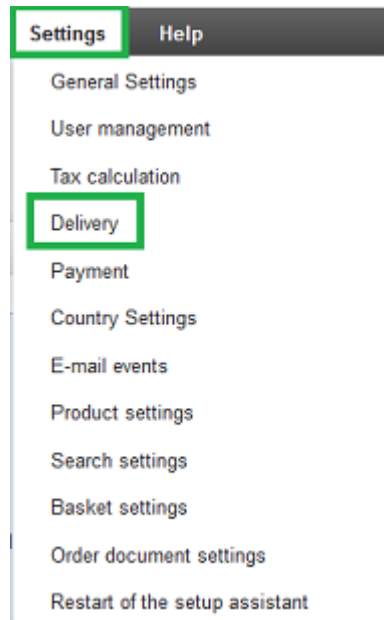
1. Delivery cost is calculated automatically based on the weight of products in the shopping basket and delivery address post code.
2. Multiple instances of the shipping method can be created if necessary.
3. Every instance of the shipping method has a maximum basket weight which can be selected as either grams, kilograms, milligrams, ounces, pounds or tons. The default weight unit setting is grams.
4. If the weight of products in the customer's shopping basket goes over a shipping method's maximum basket weight limit then that shipping method becomes unavailable and the customer is asked to choose a different shipping method (if available).
5. Delivery costs are calculated using a base value together with a cost per selected weight unit (e.g. grams, kilograms, milligrams, ounces, pounds or tons) and a percentage surcharge.
6. Default delivery costs can be used to calculate delivery cost if a delivery address postcode does not exist in any of the delivery method's regions. If not required this feature can be disabled so that an order can not use the delivery method unless the delivery address postcode exists.
7. You can offer your customers free delivery when the total value of products in an order is equal to or greater than a specified value.
8. The shipping method allows you to import shipping matrixes from different shipping companies, such as eParcel from Toll, so you only need one shipping method for each company instead of many.

Limitations

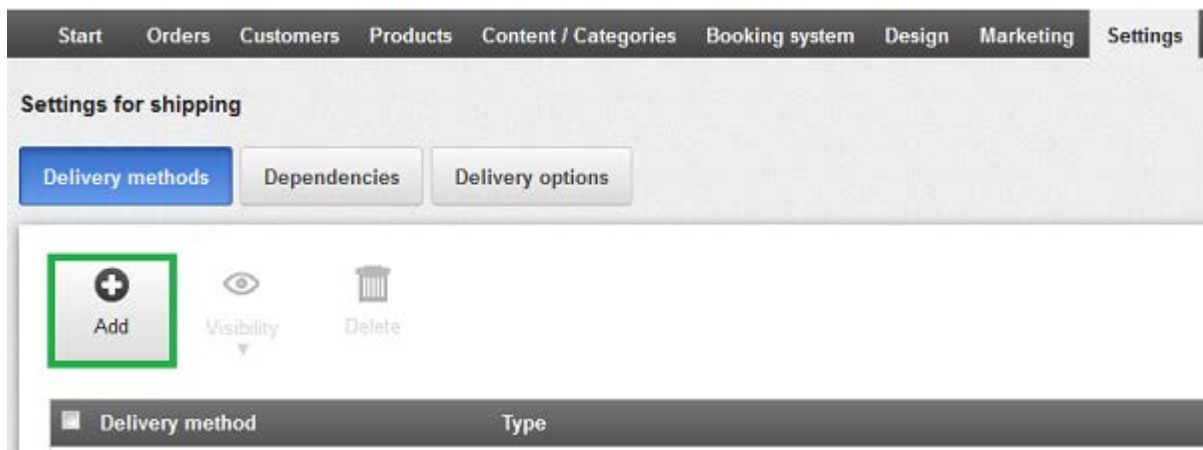
1. Please be aware that because this shipping method requires a delivery address it is incompatible with PayPal Express Checkout when the PayPal Express Checkout button is displayed in the shopping basket. Using the PayPal Express Checkout button skips the important stage during Checkout where customers specify the delivery address post code which means that the delivery cost cannot be calculated. Accordingly, you must ensure that the PayPal Express Checkout MBO setting for the PayPal Express Checkout button option is set so that the button is not displayed in the shopping basket
2. Region names must be capitalised and not contain any spaces. This will be enforced automatically. For example, entry of "Sydney Metro" will become "SYDNEYMETRO". This occurs whether manually creating the shipping method regions or using the CSV Import/Export feature to import region information from a CSV (Comma Separated Variables) formatted data file.

Delivery Method Setup

Click 'Delivery' from the Settings tab in the Merchant Back Office (MBO).



The Delivery methods page will be displayed.



Click the 'Add' option to display the 'Add delivery method' popup box.

Add delivery method

The screenshot shows a dialog box titled "Add delivery method" with a close button (X) in the top right corner. The dialog is divided into three sections:

- Logistics vendors:** A list box containing "User-defined delivery method", "Chronopost", "So Colissimo", "DHL", "DHL Intraship", and "FedEx". The "User-defined delivery method" option is highlighted with a blue selection bar and a green border.
- Type:** A list box containing "Weight of the products in the shopping basket", "Basket Weight and Region Automatic", and "Remandu". The "Basket Weight and Region Automatic" option is highlighted with a blue selection bar and a green border.
- Name in shop:** A text input field containing the text "Express Delivery", which is also highlighted with a green border.

At the bottom right of the dialog, there are two buttons: "Add" and "Cancel". The "Add" button is highlighted with a green border.

Select 'User-defined delivery method' and 'Basket Weight and Region Automatic'.
Enter a delivery method Name which will be suitable for display in the online shop.

Click the 'Add' button' to create the new delivery method.

A Global Settings page will then be displayed to enable you to continue with the setup of this new delivery method.

Note

The 'Basket Weight and Region Automatic' delivery method superceded the 'Basket Weight and Region' delivery method which was available upto version 6.12 of ePages.

If you are familiar with the old 'Basket Weight and Region' delivery method note that the delivery costs which were entered at the Settings tab of that delivery method are a limited subset of the delivery cost information which is now entered in the Levels section on the Regions tab page.

Do not confuse the delivery costs in the old 'Basket Weight and Region' delivery method with the Default delivery costs (discussed in the Global Settings section).

Global Settings

The Global page enables you to enter information which applies to all regions of this delivery method. It is important that this information is correctly setup before using the Regions page to enter information about one or more distinct regions.

Note

A guide explaining the Basket Weight and Region Automatic delivery method can be found [here](#)

The settings on this page apply to ALL regions of this delivery method

- **IMPORTANT - Weight Unit**
 - Ensure that this setting is saved BEFORE entering delivery cost levels for ANY regions
 - If you change this setting later then you would need to check values for ALL delivery cost levels otherwise delivery costs WILL be affected!
- **Default delivery costs**
 - Default delivery costs can be entered below to specify how a delivery cost should be calculated if a delivery address postcode does not exist in any of the regions
 - The Regions tab is used to create regions which have information that determines the delivery cost calculation for specific postcodes
 - You can allow or disallow this default delivery cost calculation at any time by specifying the default delivery costs option below.
 - If you select to allow this default delivery cost calculation then you must enter default delivery costs for each currency.
- **Free delivery**
 - You can offer free delivery when the total value of products in an order is equal to or greater than a specified value.
 - Do not specify a value for any currency that you do not want using this free delivery option

• Please ensure that all products have weights assigned (even if it is 0). Your customers will not be able to proceed through the checkout process using this shipping method if ordering any product without weight

Weight Unit: ⓘ

Maximum Basket Weight: g ⓘ

Tax Class: ⓘ

Allow default delivery costs: Yes No ⓘ

Calculation of delivery costs for orders in Australian Dollar (AUD)

Free from an order value of AUS

Default delivery costs

Lower Bound Weight	Upper Bound Weight	Base Value (Gross)	Cost Per g	Surcharge
0 g	unlimited g	<input type="text" value="0"/> AUS	<input type="text" value="0"/> AUS	<input type="text" value="0"/> %

Calculation: delivery costs = [Base Value + (Weight * Cost Per Unit)] + [Base Value + (Weight * Cost Per Unit)] * (Surcharge/100)

Select or enter this Global information:

- Select the weight units with which you prefer to work. If you change weight units after creating region delivery cost levels then you will also need to change the region delivery cost levels otherwise the calculation of delivery costs will be incorrect!
- Enter maximum basket weight to use with this delivery method (e.g. 5000 grams).
- Select the tax class applicable.
- Specify whether you want to allow use of Default delivery costs by clicking the appropriate radio button.
- If required, enter the Default delivery costs (delivery cost entry details are explained in the Regions section later)
Default delivery costs are used to calculate delivery cost should a delivery address postcode not exist in any of the regions
- If required, enter the order value which determines whether a customer gets free delivery
This value, known as the Exemption limit, specifies the total value of all products in an order necessary before free delivery applies. Exemption limits are currency dependent. If you have setup your shop to use multiple currencies then you should enter an exemption limit value only for those currencies for which you wish to offer free delivery.

Click the Save button.

Regions Settings

The Regions tab enables you to create delivery regions containing the weight based delivery cost levels and postcode information that will be used to calculate delivery costs for products in a customer's shopping basket.

One region should be created for each different set of weight based delivery cost levels.

Each region should contain all the postcodes for which the delivery costs to those postcodes are to be calculated using that region's set of weight based delivery cost levels.

For example, you might decide that this delivery method will use a courier whose delivery costs are based on a range of parcel weights when delivering to certain postcodes within the Sydney metropolitan area.

In this case you would create a region, say called SYDNEY-METRO, and then add the courier's set of weight based delivery cost levels and the applicable postcodes to the region.

Region

A region must be created before entering delivery cost levels or postcodes for that region.

Delivery methods + Express Delivery

General Settings Customer groups

Global Regions Import / Export

Note
IMPORTANT - Global settings MUST be created BEFORE entering delivery cost levels for ANY regions!
Click on the Notes section bar to show or hide information about setup and use of this shipping method.

Note
The delivery method is not usable because some settings are incomplete

New Region Name

Select Existing Region **No regions have been created yet**

To create a new region:

Enter a new region name (e.g. SYDNEY-METRO)

Click the Save button.

After regions have been created you can select a region from a dropdown list of all existing regions

New Region Name

Select Existing Region

Select an existing region to see that region's current delivery cost levels and postcode ranges

The page will then be redisplayed allowing you to create weight based delivery cost levels and postcode ranges for this region.

There are two **Note** information boxes (with blue backgrounds) shown above the Region area.

The first note is a reminder of the importance of setting up the Global information before proceeding with the Regions page information.

The second note appears because the delivery method is not usable in the online shop since the delivery method has not yet been completely setup.

There are three sections on the Regions page:

Notes

Click on the Notes section bar to show information you really need to know about how to setup and use this shipping method. Click the section bar again to hide this information.

After you are familiar with how to modify data on this page you will probably want to hide these Notes until such time as you need to refresh your memory on how to do something.

Levels

Click on the Levels section bar to show or hide the weight based delivery cost level calculation information for a currently selected region

This section is where you create the details of delivery costs for ranges of shopping basket weights.

Postcodes

Click on the Postcodes section bar to show or hide postcode ranges for a currently selected region.

This section is where you specify the postcode ranges which apply for the delivery cost levels.

Levels

A delivery cost is calculated as the sum of three components:

1. Base value (the minimum cost for any basket weight in the weight range)
2. Weight value (an additional cost calculated by multiplying the basket weight and the Cost Per weight unit)
3. Surcharge value (an additional fee being the Surcharge percentage of the sum of the Base and Weight values)

The mathematical formula used is shown in the screen display below.

Those familiar with the old 'Basket Weight and Region' delivery method might realise that the 'Basket Weight and Region Automatic' delivery method would calculate the same delivery cost by setting both the Cost Per weight unit and the Surcharge to zero.

Levels

Calculation of delivery costs for orders in Australian Dollar (AUD)

Lower Bound Weight	Upper Bound Weight	Base Value (Gross)	Cost Per g	Surcharge
0 g	unlimited g	0 AUS	0 AUS	0 %

Calculation: delivery costs = [Base Value + (Weight * Cost Per Unit)] + [Base Value + (Weight * Cost Per Unit)] * (Surcharge/100)

For the first delivery cost level it is only necessary to have base value, cost per weight unit and surcharge percentage since the weight range defaults to unlimited.

After clicking the 'Save' button the page is redisplayed to allow entry of another delivery cost level if required.

Levels

Calculation of delivery costs for orders in Australian Dollar (AUD)

Lower Bound Weight	Upper Bound Weight	Base Value (Gross)	Cost Per g	Surcharge
0 g	unlimited g	20 AUS	0.1 AUS	0 %
20 g	unlimited g	0 AUS	0 AUS	0 %

Calculation: delivery costs = [Base Value + (Weight * Cost Per Unit)] + [Base Value + (Weight * Cost Per Unit)] * (Surcharge/100)

When entering a second or subsequent delivery cost level the Lower Bound Weight entered should be the weight from which these new cost level values apply.

After clicking the 'Save' button the page will be redisplayed again.

Levels

Calculation of delivery costs for orders in Australian Dollar (AUD)

Lower Bound Weight	Upper Bound Weight	Base Value (Gross)	Cost Per g	Surcharge
0 g	< 100 g	20 AUS	0.1 AUS	0 %
100 g	unlimited g	30 AUS	0.05 AUS	0 %
g	g	AUS	0 AUS	0 %

Calculation: delivery costs = [Base Value + (Weight * Cost Per Unit)] + [Base Value + (Weight * Cost Per Unit)] * (Surcharge/100)

Note that the Upper Bound Weight value of the first row has been automatically changed based on the entered Lower Bound Weight of the just entered second row.

The last row will have the Upper Bound Weight value shown as 'unlimited' (note that the Global page Maximum Basket Weight value actually determines the limit).

A delivery cost level can be inserted between two existing consecutive cost levels by entering a Lower Bound Weight which is between the Lower Bound Weights of those two rows.

Postcodes

Each region should contain all the postcodes for which the delivery costs to those postcodes are to be calculated using that region's set of weight based delivery cost levels.

The screenshot shows a web interface for configuring postcodes. At the top, there is a tab labeled 'Postcodes'. Below it, the title is 'Postcode ranges for region SYDNEY-METRO'. The interface is divided into two columns: 'Country' and 'Post Code'. Under the 'Country' column, there is a dropdown menu currently showing 'Australia'. Under the 'Post Code' column, there are two input fields labeled 'From' and 'To', both of which are currently empty. The instruction 'Enter the postcode range(s) which belong to region SYDNEY-METRO' is displayed above the input fields.

Postcodes can be specified for one or more countries which can be selected from a dropdown list.

Postcodes would usually be entered as a 'From' to 'To' range (e.g. 2000 to 2199).

A single postcode can be entered by setting 'From' and 'To' to the same postcode (e.g. 2465 to 2465).

After clicking the 'Save' button the page is redisplayed to allow entry of another range of postcodes.

Note that a postcode is prevented from being used in more than one region of each instance of this delivery method otherwise you might have two or more different delivery costs for the same delivery!

Regions Summary

You can continue to manually create all the required regions, delivery cost levels and postcode region settings for this delivery method as described above.

During basket checkout a customer specifies a billing address (which is used as the delivery address unless a separate delivery address is also entered).



The delivery method postcode ranges are searched to find the region which contains a postcode range that includes the postcode of the address used for delivery.

The region's weight based delivery cost levels are then used to calculate the delivery cost for the weight of the products in the shopping basket.

If a region can not be found for the address postcode and Global Default delivery costs have been created (and those delivery costs have the Global setting to allow them) then those delivery costs are used to calculate the delivery cost.

Complete it

The screenshot shows the 'Settings for shipping' interface. At the top, there is a navigation bar with tabs: Start, Orders, Customers, Products, Content / Categories, Booking system, Design, Marketing, and Settings. Below this, the 'Settings for shipping' section is active, with three sub-tabs: 'Delivery methods' (selected), 'Dependencies', and 'Delivery options'. Under 'Delivery methods', there are three icons: 'Add' (plus sign), 'Visibility' (eye with slash), and 'Delete' (trash can). Below these icons is a table with two columns: 'Delivery method' and 'Type'. The table contains two rows:

Delivery method	Type
ProductWeight	Weight of the products in the shopping basket
Express Delivery	 Basket Weight and Region Automatic Complete it 

At the bottom left of the table area, there is a 'Saved' button.

The Delivery methods page shows two items which indicate the usability of a delivery method.

The icon before the delivery method Type shows that the delivery method is not visible in the online shop.

The 'Complete it' link shows that the delivery method has not yet been completely setup. Click this link to go to the delivery method page and check that every region has postcode ranges and all required delivery cost levels.

Import / Export

The Import / Export feature allows you to input (Import) or create (Export) data files which contain the region postcodes and weight based delivery cost levels for one or more regions.

Note

Please follow these instructions when running an Import or an Export

- A sample postcodes 'Region Settings' csv file can be downloaded [here](#)
- A sample delivery costs 'Level Settings' csv file can be downloaded [here](#)
- Please make sure that the file you are importing has a file extension of 'csv' and that it is in the correct format according to the sample files. Note that first row must be used as the heading row.
- It is recommended that the postcodes 'Region Settings' csv file is imported first and then the delivery costs 'Level Settings' csv file
- Region names must be capitalised and not contain any spaces. This will be enforced automatically. e.g. entry of 'Sydney Metro' will become 'SYD-NEYMETRO'
- For the delivery costs 'Level Settings' csv file, each region's levels are sorted in ascending lower bound order for each currency
- A delivery costs 'Level Settings' csv file can have rows with a region name DEFAULT. Such rows can be used to calculate default delivery costs if a delivery address postcode does not exist in any postcode region. See the Global tab to allow or disallow this calculation option

IMPORTANT: A successful 'Import' DELETES previous settings for ALL regions of the selected Import type

Import / Export Type: Region Settings ⓘ

CSV import file: Select file... ⓘ
Maximum file size: 10 MByte

Import Export

This feature can be quite useful when creating many regions, delivery cost levels or postcode ranges. For example, you could manually create one region with at least one delivery cost level and one postcode range then export that information to create CSV (Comma Separated Variables) data files. After manually edited these CSV files to add more regions, delivery cost levels and postcode ranges the files can be imported to the delivery method.

This approach may be faster than manually entering the same information.

Import / Export Type

The Import / Export Type determines the type of data file required.

Import / Export Type

Region Settings ⓘ

Region Settings

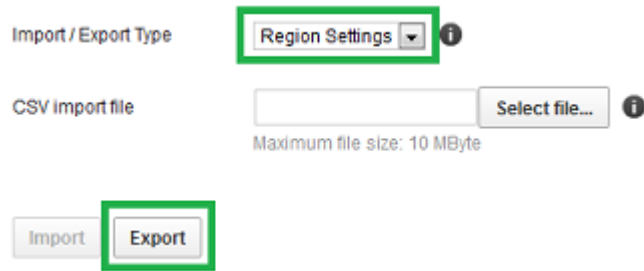
Level Settings

Select the required data file

Region Settings - for a file containing region postcodes

Level Settings - for a file containing weight based delivery cost levels

Export



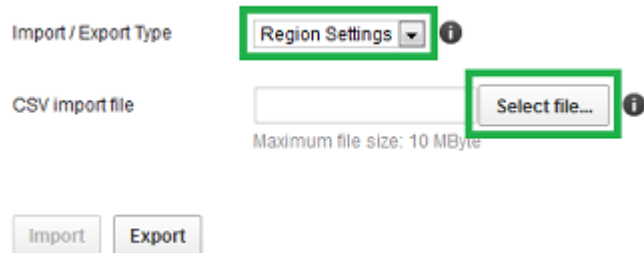
Click the Export button to create a CSV formatted data file of the specified Import / Export Type.

To modify the exported CSV file open it using Microsoft Excel.

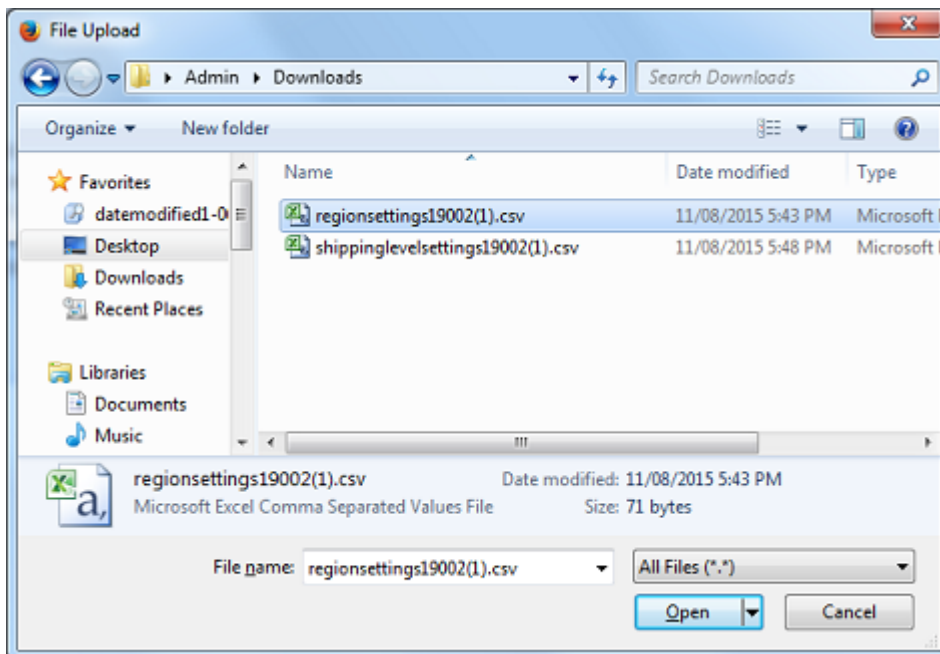
Change or input data into this CSV file, in required format, either manually or by cut/paste from other sources such as the superceded 'Basket Weight and Region' shipping method.

Import

The example images below are for Region Settings (importing of Level Settings is similar).



To import a file click the 'Select file...' button to open the File Upload window



Select the required file by double-clicking that file (or click once and then click the Open button).

The Import / Export page is redisplayed showing the selected file and activating the Import button.

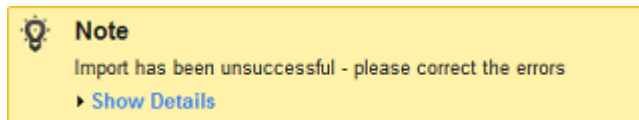
The screenshot shows a web interface for importing/exporting data. At the top, there is a label 'Import / Export Type' followed by a dropdown menu set to 'Region Settings' and an information icon. Below this is a 'CSV import file' section with a text input field containing 'regionsettings19002(1).c' and a 'Select file...' button. Underneath the input field, it says 'Maximum file size: 10 MByte'. At the bottom of the form, there are two buttons: 'Import' and 'Export'. The 'Import' button is highlighted with a green rectangular border.

The Import button can then be clicked to import the CSV file information.

The file being imported is checked to ensure that all the information is valid before any changes are made to the delivery method's existing information.

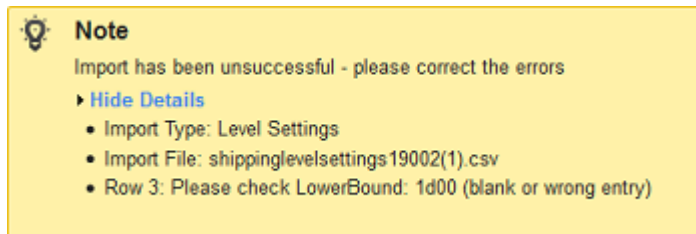
The information for each region of a valid import file replaces that region's existing information.

If the file being imported has any invalid information then you will see this Note:



When there are errors none of the existing delivery method region information will be changed.

Click 'Show Details' to display errors showing the row numbers in the CSV file which are invalid.



Check that the file has been imported with the correct Import Type (if not, reimport the file).

Modify the CSV file to correct the errors.

Reimport the CSV file.

General

Click the General tab for the settings to make the delivery method available in your online shop.

The screenshot shows the 'Express Delivery' settings page in the Merchant Back Office. The navigation bar includes 'Start', 'Orders', 'Customers', 'Products', 'Content / Categories', 'Booking system', 'Design', 'Marketing', 'Settings', and 'Help'. The page title is 'Delivery methods + Express Delivery'. There are three tabs: 'General', 'Settings', and 'Customer groups', with 'General' selected. The settings include:

- Internal ID ***: Express Delivery
- Type**: Basket Weight and Region Automatic
- Visible**: Yes No (highlighted with a green box)
- Default selection**: Yes No
- Allow for all products**: Yes No ⓘ
- Allow usage for the following delivery addresses**: All countries of the shop
- English Name in shop**: Express Delivery
- Comment**: A rich text editor with a toolbar and a large text area.
- Logo** (Display only in order process "In individual steps"): Includes an 'Upload image' button, a checked 'Change size during upload' checkbox, and dimensions 'max. width 64px x max. height 64px'. Below is a 'Display logo' section with Yes No.

At the bottom are 'Save' and 'Delete' buttons.

Click the Default 'Yes' radio button to make this delivery method the default in the online Shop. Of course, a customer can select to ship the order using any other available delivery method.

By default a delivery method can be used for delivery addresses in 'All countries of the shop' but this can be changed by using Settings / Country Settings / Regions / in the Merchant Back Office to create a region comprising of one or more countries.

Country regions will appear as options in the dropdown list (shown above) which, when selected, will restrict the delivery method to that region (group of countries).

The 'Basket Weight and Region Automatic' delivery method uses the postcode range settings to define the countries and the postcodes which are valid. Accordingly, you should use Settings / Country Settings / Regions to create a region of countries that is consistent with all the countries defined in the postcode ranges of the delivery method.

The 'Allow usage for the following delivery addresses' dropdown list option should then be set to that region to avoid a situation where the delivery method is available in the online Shop for countries you do not intend.

If you have specified the delivery method to use default delivery costs then an inconsistent Country region would result in the customer being able to create an order, with delivery cost based on defaults, for delivery to a country that should not use this delivery method.

The description in the ID textbox will, by default, be displayed as the Delivery method name in the basket Checkout steps. This default will not be used if a name is entered into the English Name textbox.

Any description in the Comment textbox will display in the shop together with the Delivery method name. This is particularly useful if you want to display to the customer some additional information about the delivery method during the shopping basket Checkout steps.

When the Settings / Basket settings / Order process radio button in the Merchant Back Office is set to 'In individual steps' then a logo can optionally be uploaded and displayed in the online shop with the delivery method (Not available for the Classic checkout process).

Finally, set your new method to be visible in the online Shop by clicking the Visible 'Yes' radio button.

Click the Save button.

This delivery method is now available to be selected in the online shop and the calculated delivery cost will be displayed based on a customer's delivery address postcode and weight of products in the shopping basket.