

## 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

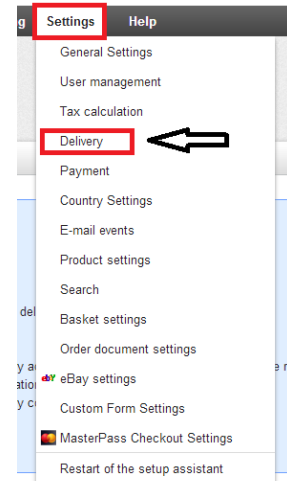
1. Delivery cost is calculated automatically based on the weight of products in the shopping basket and delivery address post code.
2. Multiple instances of the shipping method can be created if necessary.
3. Every instance of the shipping method has a maximum basket weight which can be selected as either 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. 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

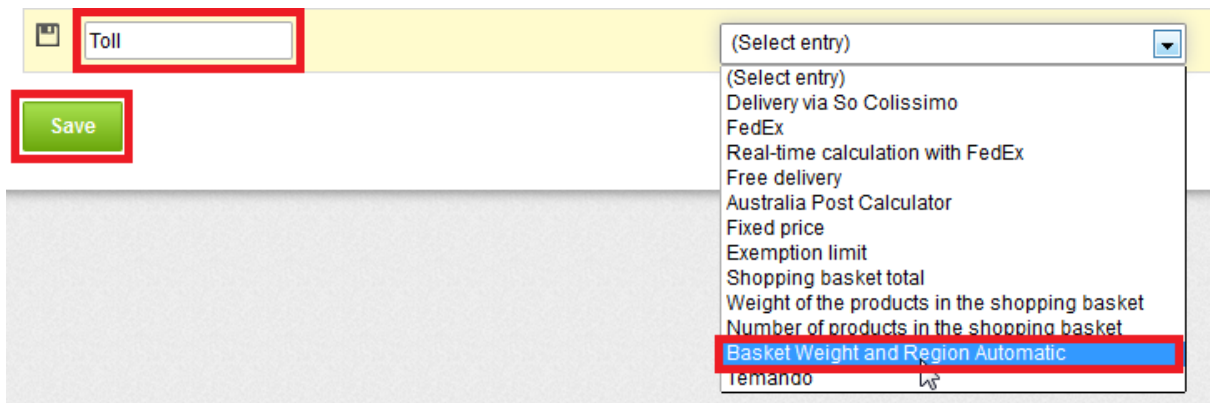
1. Please be aware that this shipping method will not work with PayPal Express. PayPal Express skips the important stage in the shopping basket where customers specify the delivery address post code which means that the delivery cost cannot be calculated.
2. Region names must be capitalised and not contain 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).



On the Delivery methods page select the delivery option 'Basket Weight and Region Automatic' from the dropdown list at the bottom of the Type column.



Choose the name that represents your shipping method. For example, if you are inputting a matrix of weight based delivery cost levels from Toll then you may wish to call it Toll.

Click the Save button.



After the page has been redisplayed then click "Complete it"

## Complete it

The Settings page is displayed to enable completing the setup of this new delivery method.

Initially, the Regions tab is selected by default since it likely that this tab will be used most frequently. However, when first setting up this delivery method, some global information is required before entering information for regions.

Click the Global tab.

## Global

**Note**  
These settings 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.
- For help on common issues, please see our troubleshooting guide [here](#)

Weight Unit:

Maximum Basket Weight:  g

Tax Class:

Allow default delivery costs:  Yes  No

**Default delivery costs**  
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	<input type="text" value=""/> \$	<input type="text" value="0"/> \$	<input type="text" value="0"/> %

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

Enter the information which applies to all regions of this delivery method:

- 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 (for entry details see Regions later)
- Click the Save button

Note that Default delivery costs are a new feature in this version of the 'Basket Weight and Region Automatic' delivery method. They are used to calculate delivery cost should a delivery address postcode not exist in any of the regions

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 new Global tab Default delivery costs.

## Regions

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.

You can enter a new region name or select a region from a dropdown list of all previously created regions.

The screenshot shows the 'Delivery methods' settings page for a 'toll' delivery method. The 'Settings' tab is active, and the 'Regions' sub-tab is selected. A blue note box contains the following text: '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.' Below the note, there is a 'New Region Name' input field with the text 'SYDNEY-METRO' and an information icon. Below that is a 'Select Existing Region' dropdown menu with the text 'No regions have been created yet'.

Below this are three sections:

### 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.

### Levels

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

### Postcodes

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

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

To create a new region:

- g. Enter a new region name (e.g. SYDNEY-METRO)
- h. Click the Save button.

If you are familiar with previous versions of the 'Basket Weight and Region Automatic' delivery method you will note that in this version saving or deleting information has been simplified by only having one group of buttons which appear at the bottom of the page.

Choose an existing region, e.g. SYDNEY-METRO, from the Select Region dropdown list then create at least one weight based delivery cost level and at least one postcode range.

▼ Levels

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

Lower Bound Weight	Upper Bound Weight	Base Value (Gross)	Cost Per g	Surcharge
<input type="checkbox"/> 0 g	< 500 g	20 \$	5 \$	0 %
<input type="checkbox"/> 500 g	< 2,000 g	0 \$	6 \$	0 %
<input type="checkbox"/> 2,000 g	unlimited g	0 \$	8 \$	0 %
<input type="text" value=""/> g		<input type="text" value=""/> \$	<input type="text" value=""/> \$	<input type="text" value=""/> %

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

▼ Postcodes

Postcode ranges for region SYDNEY-METRO

Country	Post Code
<input type="checkbox"/> Australia	From : 2000 To : 2999
<input type="text" value="Australia"/>	From : <input type="text" value=""/> To : <input type="text" value=""/>

## Levels

When entering the first delivery cost 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 weight range if required.

When entering a second or subsequent weight range the Lower Bound Weight is the weight from which these new weight range values apply.

The Upper Bound Weight values are automatically determined when a new weight range level is saved.

The highest Upper Bound Weight value is shown as 'unlimited' (note that the Global tab Maximum Basket Weight value actually determines the limit).

There is the ability to insert a weight range between two existing consecutive weight ranges by entering a Lower Bound Weight which is between those two existing Lower Bound Weights.

The delivery cost calculated is 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 above.

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 Surcharge to zero.

## 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.

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).

A basket delivery address postcode is used to determine the region and hence the associated weight based delivery cost levels. Accordingly, each postcode is prevented from being used in more than one region of each instance of this delivery method.

## Regions Summary

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

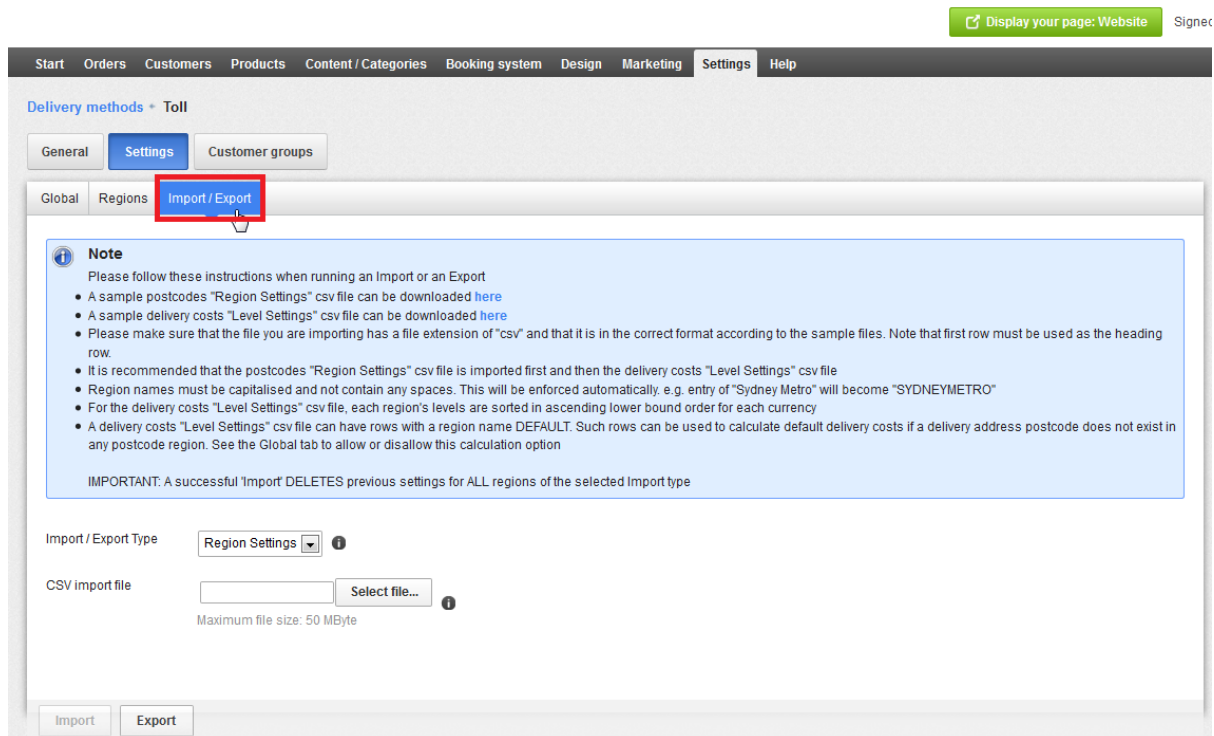
Alternatively, create one region with at least one delivery cost level and postcode region then export that information to create CSV files.

This will provide you with the files in the correct format to which you can add further information. This approach may be faster if you have a lot of delivery cost level and postcode region information (for details see Import / Export).



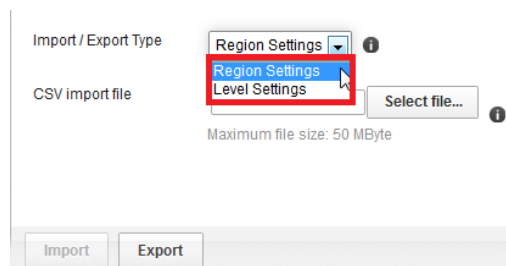
## Import / Export

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.



### Import / Export Type

The Import / Export Type, which is selected from a dropdown list, determines the type of data file required.



Select the required data file

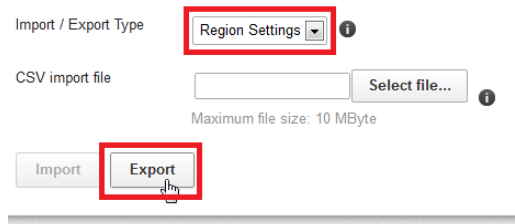
Region Settings - for a file containing region postcodes

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

Data files are in CSV (Comma Separated Variables) file format.

## 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.

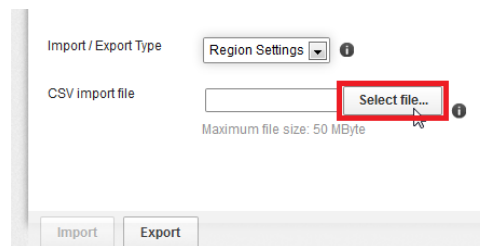
Change or input data into this CSV file, in required format, either manually or by cut/paste from other sources such as the superceded 'Basket Weight and Region' shipping method.

## Import

The Import button is used to input a CSV formatted data file of the specified Import / Export Type.

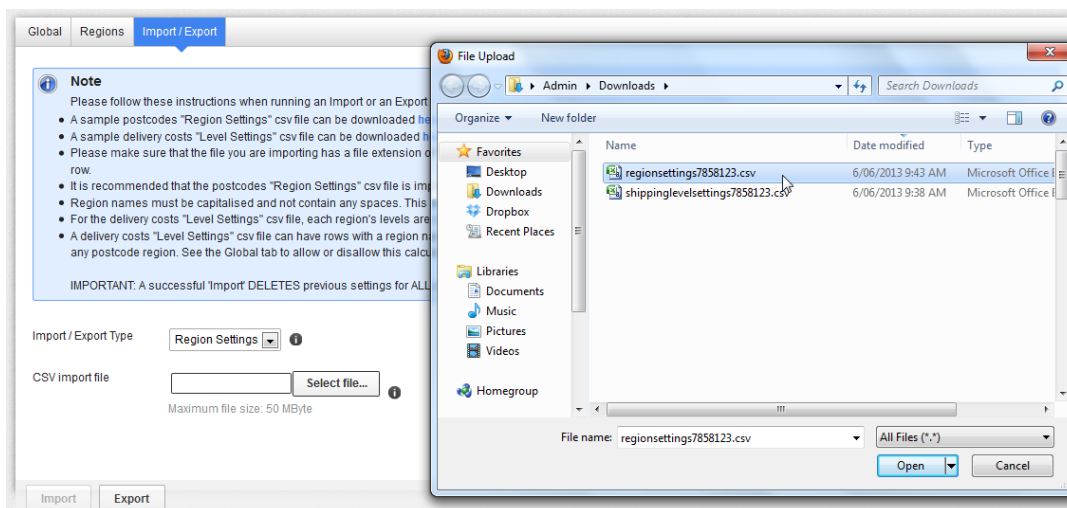
The file being imported is checked to ensure that all the information is valid before any changes are made to the delivery method's existing information.

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



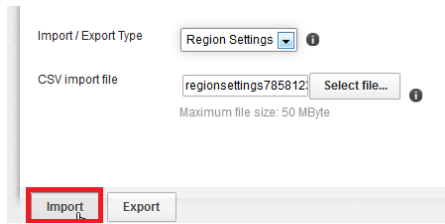
The example images below are for Region Settings (importing of Level Settings follows the same procedure).

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).

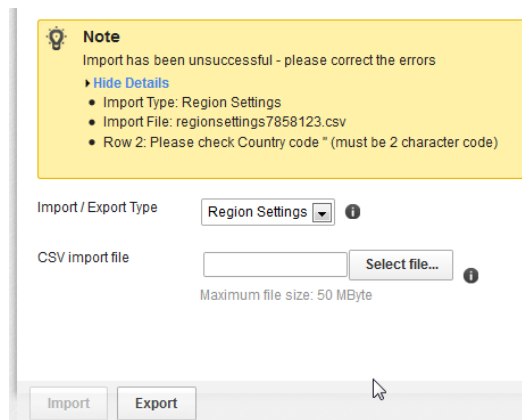
Once the file type and name are selected the import can begin.



The screenshot shows a web interface for importing data. At the top, there is a dropdown menu labeled 'Import / Export Type' with 'Region Settings' selected. Below it, a text input field contains 'regionsettings7858123' and a 'Select file...' button. A note below the input field states 'Maximum file size: 50 MByte'. At the bottom of the interface, there are two buttons: 'Import' and 'Export'. The 'Import' button is highlighted with a red rectangular box.

Click the Import button to import the CSV file information.

If the file being imported has any invalid information then errors are displayed showing the row numbers in the CSV file which are invalid.



The screenshot shows the same web interface as before, but with an error message displayed in a yellow box at the top. The message reads: 'Note: Import has been unsuccessful - please correct the errors'. Below this, there is a link 'Hide Details' and a list of error details: 'Import Type: Region Settings', 'Import File: regionsettings7858123.csv', and 'Row 2: Please check Country code \* (must be 2 character code)'. The 'Import' and 'Export' buttons are visible at the bottom, but the 'Import' button is no longer highlighted.

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

Modify the CSV file to correct these errors and reimport the CSV file.

## General

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

Delivery methods - toll

General Settings Customer groups

ID toll

Type Basket Weight and Region Automatic

Visible  Yes  No

Default  Yes  No

Allow usage for the following delivery addresses All countries of the shop

English Name

Comment Edit text

Logo (Display only in order process "In individual steps")

Upload file

Change size during upload (max. width 64px × max. height 64px)

Display logo  Yes  No

Save Delete

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

Clicking the Default 'Yes' radio button makes 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. Such regions will appear as options in the dropdown list (shown above) which when selected will restrict the delivery method to that region. However, the 'Basket Weight and Region Automatic' delivery method uses the postcode range settings to define the countries and the postcodes which are valid. Accordingly, the dropdown list option should remain as 'All countries of the shop' to avoid setting it to a region which might conflict with postcode range countries and prevent the online Shop using the delivery method.

The description in the ID textbox will, by default, be displayed as the Delivery method name in the basket Checkout steps. This can be changed to a name entered into the English Name textbox.

Any description in the Comment textbox will display in the shop with the Delivery method name.

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).

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 shipping basket.