

Web Link Help File: Shipping Service Management

Abstract

- This help file demonstrates how to setup shipping services to be offered to customer users of the site.

Procedure

- 1) Sign into the site as website administrator user.
- 2) To access the Shipping Services page, select "Manage Shipment Services" from the Tax and Shipment Management menu. (fig. 1)



fig.1

- 3) The Manage Shipping Services page lists all shipping services that have already been created. To create a new service offering select the "Add New Service" link. (fig 2)

Manage Shipment Services

Use this page to find shipping services under different location. Simply select any location value from the location list below to view the service under that location. To add new service under any location press "Add New Service" link.

fig.2

Add New Service ←

| Service Name | Part# | Line Code | Edit | Delete | Provider |
|------------------------------|---------|-----------|------|--------|----------------|
| Delivery | TCFG | 123 | Edit | 🗑️ | CompanyCarrier |
| Pick Up | GHTF | 678 | Edit | 🗑️ | CompanyCarrier |
| Will Call | | | Edit | 🗑️ | CompanyCarrier |
| CC Shipment | | | Edit | 🗑️ | CompanyCarrier |
| FedEx Express Saver | 3333 | 333 | Edit | 🗑️ | FedEx |
| UPS 2nd Day Air | 2nd day | UPS | Edit | 🗑️ | UPS |
| FedEx Home Delivery | 22460 | GAT | Edit | 🗑️ | FedEx |
| UPS Next Day Air | | | Edit | 🗑️ | UPS |
| UPS Worldwide Express Plus | | | Edit | 🗑️ | UPS |
| UPS Next Day Air Saver | | | Edit | 🗑️ | UPS |
| UPS Worldwide Express | | | Edit | 🗑️ | UPS |
| FedEx Priority Overnight | ABC | ABC | Edit | 🗑️ | FedEx |
| | test | test | Edit | 🗑️ | UPS |
| FedEx International Economy | | | Edit | 🗑️ | FedEx |
| FedEx Ground | | | Edit | 🗑️ | FedEx |
| FedEx Second Day | | | Edit | 🗑️ | FedEx |
| FedEx International Priority | | | Edit | 🗑️ | FedEx |
| FedEx International Ground | | | Edit | 🗑️ | FedEx |

Add New Service ←

- 4) The first section of the Add/Update Shipment Service page is where the admin user will assign the "Service Details". Select a provider from the drop down list; the available options are UPS, FedEx, or a Company Carrier which can be used to setup a service offered by your company (ie pick up or local delivery service). In the example below UPS has been chosen as the provider with "Ground" as the delivery service and "Daily Pickup" for the pickup type. Finally, this service can be made available for retail and/or wholesale accounts and enabled by selecting the "yes" radio button. Selecting "no" will allow the service to be created but will not be presented as a shipping option at checkout. (fig.3)

Add/Update Shipment Service

Service Details

Provider: UPS

ServiceType: UPS Ground

PickupType: UPS Daily Pickup

Available To: Retail Wholesale

Enable: Yes No

fig.3

- 5) If more than one store location has been configured on the site, the Applicable On section allows the administrator to assign the shipment service to these locations by selecting the appropriate check boxes. Alternatively, as in this example, the service may be applied for all locations. (fig. 4)

Applicable on

All Locations Selected Locations

Auto Eagle Sales MRS Test Location 1 MRS Test Location 2

Test Location12 Warehouse

fig.4

- 6) In the Average Route Time section delivery times can be entered for each store location. Select the primary location from the drop down menu and then the approximate delivery times in days and hours in the appropriate fields for each store. Select the Show Delivery Time checkbox in order to display these delivery times to the customer at checkout. (fig. 5)

Average route time

If Customer's Primary location is

Average Route Time from

| Location | Days | Hours |
|---------------------|--------------------------------|--------------------------------|
| Auto Eagle Sales | <input type="text"/> | <input type="text" value="4"/> |
| MRS Test Location 1 | <input type="text" value="1"/> | <input type="text"/> |
| MRS Test Location 2 | <input type="text" value="2"/> | <input type="text"/> |
| Test Location12 | <input type="text" value="3"/> | <input type="text"/> |
| Warehouse | <input type="text" value="2"/> | <input type="text"/> |

Show Delivery Time Yes ←

fig.5

- 7) Shipping charges are configured in the Rates section. Surcharges, handling charges and overhead charges can be applied as a percentage of the purchase price or as flat rates. The main shipping charges are applied as flat rates using the rate table by selecting the "Use Flat Rates" option (see step #8 below) or, for UPS or Fedex only, the charges can be derived directly from the provider in real time by selecting the "Use Rate Estimation Services" option. For rate estimation services to work it is recommended to have part weight data entered into the business system. (fig. 6)

Rates

Surcharge Percentage Flat

Handling Charge Percentage Flat

Overhead Charge Percentage Flat

Use Flat Rates

Use Rate Estimation Services

Associate To

fig.6

- 8) If using flat rates for shipping fees then the Shipment Rate Table must be used. This is accessed from the "Manage Shipping Rate Table" module within the Tax and Shipment Management menu. Set purchase value ranges in the Order Value Up To column and the corresponding rates in the shipping service column. In this example our "Delivery" service shipping fees are \$5.00 for orders up to \$20.00, \$10.00 for orders between \$20.01 and \$50.00, \$15 for orders totaling \$50.01 to \$100.00 and \$20.00 for orders over \$100. Click the "Save Rate Table" button when finished. (fig. 7)

Expand All

- Start Shopping
- Order Status
- Business Tools
- Content Management
- My Account
- Email Management
- Promotion Management
- User Login Management
- Customer Account Management
- Catalog Management
- Vehicle Management
- Tax & Shipment Management
 - Manage Shipping Exceptions
 - Manage Shipping Rate Table
 - Tax Setup
 - Manage Shipment Services
 - Enter Tracking Numbers
 - Virtual Inventory Management

Shipment Rate Table

| SI No | Order Value Upto | Delivery |
|-------|--------------------------------------|------------------------------------|
| 1 | <input type="text" value="20.00"/> | <input type="text" value="5.00"/> |
| 2 | <input type="text" value="50.00"/> | <input type="text" value="10.00"/> |
| 3 | <input type="text" value="100.00"/> | <input type="text" value="15.00"/> |
| 4 | <input type="text" value="1000.00"/> | <input type="text" value="20.00"/> |
| 5 | <input type="text"/> | <input type="text"/> |
| 6 | <input type="text"/> | <input type="text"/> |
| 7 | <input type="text"/> | <input type="text"/> |
| 8 | <input type="text"/> | <input type="text"/> |
| 9 | <input type="text"/> | <input type="text"/> |
| 10 | <input type="text"/> | <input type="text"/> |

Save Rate Table... ←

fig.7

- 9) Selecting the "Apply Sales Tax to the Charges Calculation" check box will apply the appropriate sales tax rate as assigned in the Tax Setup area to the calculated shipping fees. Additionally automatic shipping charge discounts can be applied based upon order totals. In this example all orders that equal or exceed \$100.00 are offered free shipping (100% discount). Please note that overrides apply to core rates only and not to surcharge, handling or overhead charges. If additional fields are needed the "Add New Row" link can be selected.(fig.8)

Apply Sales Tax to the Charges Calculation

Overrides

| Min. Order Value | Discount | Type |
|----------------------------------|----------------------------------|--|
| <input type="text" value="100"/> | <input type="text" value="100"/> | <input checked="" type="radio"/> Percentage <input type="radio"/> Flat |
| <input type="text"/> | <input type="text"/> | <input type="radio"/> Percentage <input checked="" type="radio"/> Flat |
| <input type="text"/> | <input type="text"/> | <input type="radio"/> Percentage <input checked="" type="radio"/> Flat |


 [Add New Row](#)

fig.8

- 10) The Service Identifier section can be used for the purpose of identifying the shipping service selected for each order placed on the site. In this example when the UPS Ground service is selected orders will include the UPS GND code. This code will print out on a pick ticket as an additional part number which will clearly indicate the shipping method that should be used to deliver the order. Click on the "save" button to save all settings and add the service to the list of shipping service offerings.

Service Identifier

Shipment Part Number

Shipment Line Code

