

Shipping Class User Guide

Shipping Class Actions

Add Shipping Class

To start this action, click the  button above the Shipping Class listing.

Creates a new Shipping Class.

When this action starts a form is displayed to enter the details of the Shipping Class.

Each field customises or controls some aspect of the Shipping Class display or behaviour.



Some fields are required and must be entered before the Shipping Class can be added, the required fields are Shipping Class Name, Description, Delivery Type, Show This Class, Calculation Method, Accept if No Minimum Value, No Minimum Value Shipping Cost, Maximum Item Value Action, Maximum Band Value, Excess Value Step Size, Charge per Excess Value Step, Maximum Excess Item Total Action, No Minimum Weight Action, No Minimum Weight Item Total, No Minimum Weight Shipping Cost, Maximum Band Weight Action, Maximum Band Weight, Excess Weight Step Size, Charge Per Excess Weight Step, Maximum Excess Weight Action, Large Order Item Total Action, Large Order Item Total, Large Order Shipping Cost, Apply apportioning VAT rules..

Although some fields are not required, it is best practice to populate these, including .

Most fields are optional, and are often prefilled with a good default so these may not need to be changed. These optional fields allow further customisation.

Alongside most fields is a small ? icon with further help for each field. This information is included at the end of this document.

View

To start this action, select the Shipping Class you need to work on, and click the  View button in the  More Menu on that row.

Display the selected Shipping Class.

This action displays the Shipping Class similarly as for an Edit Action, except none of the fields are editable.

Useful for reviewing records without making any changes.

Edit

To start this action, select the Shipping Class you need to work on, and click the  button on that row.

Edits an existing Shipping Class.



When this action starts a form is displayed with the existing Shipping Class and any previous information entered.

Each field customises or controls some aspect of the Shipping Class display or behaviour.

When editing it is advisable to only change what is needed and most fields may not need to be changed. These other fields allow further customisation.

Alongside most fields is a small ? icon with further help for each field. This information is included at the end of this document.



Copy

To start this action, select the Shipping Class you need to work on, and click the  Copy button in the  More Menu on that row.

Copies an existing Shipping Class.

The selected Shipping Class is copied and the word (Copy) will be added to the name of the new Copy

Delete

To start this action, either select the Shipping Class to work on and click the  button on that row. Or CTRL+click to select multiple Shipping Classes and click the  button above the Shipping Class listing.

Deletes an existing Shipping Class.

When this action starts a screen is displayed to check for Confirmation before the Action continues.

On this screen a list of warnings may be provided to show the impact of deleting this Shipping Class.

Search



To start this action, click the  button above the Shipping Class listing.

Allows a Search of Shipping Classes.

This allows a simple text search across all Shipping Classes.

To search a specific field select the field from the drop down list

Adv. Search



To start this action, click the  **Adv. Search** button above the Shipping Class listing in the  More Menu.

Allows an Advanced Search of Shipping Classes.

The Advanced Search opens a new section at the bottom of the Shipping Classes and allows several distinct features:

- Multiple Search Lines : allows Shipping Class matches to be identified where more than one search criteria is required
- Nested Searches : allows a combination of AND and OR logic to find results
- Saved Filters : allows a search to be saved as a Filter
- Export : allows the results of the search to be exported and worked on separately

Refresh



To start this action, click the  **Refresh** button above the Shipping Class listing in the  More Menu.

Refresh the list of Shipping Classes.

Allows the list of records to be refreshed.

Although the records in the system will automatically update if a another Admin is using the system at the same time, the Refresh button allows the list to be manually updated.

Export to List

To start this action, click the  **Export to List** button above the Shipping Class listing in the  More Menu.

Export the Shipping Class results shown to a List.

An Export List can be downloaded as a CSV file, or through any number of customised Export Templates.

Export to List will begin the process of Exporting the Shipping Classes shown.



Once the data is exported it is available to download as a CSV file with all columns.

A list of Export Templates for Shipping Classes will be shown, select the Export Template to Print, Export to Document, Export to CSV or Email.

Before using a template an opportunity to amend the template is provided.

See Export Templates for more information on Managing Export Templates.



Export All

To start this action, click the  **Export All** button above the Shipping Class listing in the  More Menu.

Export all the Shipping Classes to a List.

Exactly as for "Export to List" except rather than just Exporting the Shipping Class results shown, all Shipping Classes will be expored.



Export Item

To start this action, select the Shipping Class you need to work on, and click the  **Export Item** button in the  More Menu on that row.

Export only the selected Shipping Class to a List.

Exactly as for "Export to List" except rather than just Exporting the Shipping Class results shown, only the selected Shipping Class is exported.

Import Shipping Classs

To start this action, click the  **Import Shipping Classs** button above the Shipping Class listing in the  More Menu.

Import Shipping Classs from a CSV file

Allows a CSV file of Shipping Classs to be imported to create individual Shipping Class records for each row.

See separate Import documentation.

Choose Columns

To start this action, click the  **Choose Columns** button above the Shipping Class listing in the  More Menu.

Changes the Columns shown in the Shipping Class Listing.

The Choose Columns screen shows the Selected Columns on the left, and the Shipping Class Columns available on the right.

Drag and Drop column names between the two columns.

Alternatively double click on a column name to move it from one list to the other.

On the left the Selected Columns can be dragged up and down to change the ordering in the Shipping Class Listing.

Manage Filters

To start this action, click the  **Manage Filters** button above the Shipping Class listing in the  More Menu.

Creates custom Filters for Shipping Classes.

A Filter is a saved Advanced Search. Multiple Filters can be created for Shipping Classes.

These Filters appear at the top of the Shipping Class listing.

When the Filter is selected the results are restricted to only include those which match the Filter.

The Manage Filters action shows a list of existing Filters for Shipping Classes where these can be managed.

Shipping Class Field Reference

Shipping Class Name

This field is mandatory.

e.g. 'P+P'

Shipping Class Short Code

Short code to identify this shipping class

Description

This field is mandatory.

Description of the class, e.g. 'Postage and Packing'

Delivery Type

This field is mandatory.

The type of delivery this shipping class represents.

Postage - Buy online, delivery by post

Click & Collect - Pay online, collect in store

Reserve Online - Reserve online, pay & collect in store

Email Message

Messaging to include in the Email Template

World Region

Select the World Region(s) that define the countries to which this shipping class applies

Show This Class

This field is mandatory.

Set to allow this Shipping Class to be selected at the checkout (this setting is ignored in the Order Manager). Don't set if no longer required for new orders but needed for historic orders.

Calculation Method

This field is mandatory.

Defines whether the shipping cost is based on the Item Total or the Total Item Weight

Accept if No Minimum Value

This field is mandatory.

Applies when the Item Total is less than the Minimum Item Value defined in the first defined shipping band. If set, the order is acceptable and the No Minimum Value Shipping Cost is applied. If not set, the order won't be accepted

No Minimum Value Shipping Cost

This field is mandatory.

Applies when 'Accept if No Minimum Value' is set. This is the shipping cost applied

Maximum Item Value Action

This field is mandatory.

Defines the action taken if the Item Total exceeds the Maximum Band Value

Maximum Band Value

This field is mandatory.

Defines the highest Item Total value at which the last Shipping Band applies

Excess Value Step Size

This field is mandatory.

The amount by which the Item Total exceeds the Maximum Item Value is divided by this value to give the number of Excess Values Steps. The number of Excess Value Steps is multiplied by the Charge per Excess Value Step to give the Shipping Excess cost.

Charge per Excess Value Step

This field is mandatory.

The additional charge applied for each Excess Value Step

Maximum Excess Item Total Action

This field is mandatory.

Defines the action taken when the Item Total reaches the Maximum Excess Item Total

Maximum Excess Item Total

When the order's Item Total reaches this value, the Maximum Excess Item Total Action applies.

This value must be at least as high as the Maximum Band Value

No Minimum Weight Action

This field is mandatory.

Determines if the order is acceptable when the Total Item Weight is less than that defined in the first defined shipping band.

No Minimum Weight Item Total

This field is mandatory.

The Item Total must be at least this value for the order to be accepted.

No Minimum Weight Shipping Cost

This field is mandatory.

The shipping cost applied if the order is accepted when the Total Item Weight is less than the first defined shipping band

Maximum Band Weight Action

This field is mandatory.

Defines the action taken if the Total Item Weight exceeds the Maximum Band Weight

Maximum Band Weight

This field is mandatory.

Defines the highest Total Item Weight in kg at which the last Shipping Band applies

Excess Weight Step Size

This field is mandatory.

The amount by which the Total Item Weight exceeds the Maximum Shipping Value is divided by this value to give the number of Excess Weight Steps. The number of Excess Weight Steps is multiplied by the Charge per Excess Weight Step to give the Shipping Excess cost.

Charge Per Excess Weight Step

This field is mandatory.

The additional charge applied for each Excess Weight Step

Maximum Excess Weight Action

This field is mandatory.

Defines the action taken when the Total Item Weight reaches the Maximum Excess Weight

Maximum Excess Weight

When the Total Item Weight reaches this value, the Maximum Excess Weight Action applies.

This value must be at least as high as the Maximum Band Value

Large Order Item Total Action

This field is mandatory.

Defines if a special action should be taken for a large order, if the Item Total exceeds the Large Order Item Total

Large Order Item Total

This field is mandatory.

If Item Total of the order is at least this value then the action is taken.

Large Order Shipping Cost

This field is mandatory.

The shipping cost applied for a large order.

Apply apportioning VAT rules.

This field is mandatory.

Delivery charge VAT will be apportioned according to the proportion of zero rated to vat rated items in the basket.

Nominal Code

The nominal code if different to the 'Default Nominal Code' defined in the ECommerce Settings

Department Code

The department code if different to the 'Default Department Code' defined in the ECommerce Settings

Cost Centre

The cost centre if different to the 'Default Cost Centre' defined in the ECommerce Settings

Postcodes Included

A semi-colon separated list of postcode prefixes for which this shipping class applies.

Leave blank to apply to all postcodes

Ranges may be applied to the first part of a postcode on the numeric section before the space only

Eg. BH1;BH2;DT1-4

Where additional granularity is required, a space is permitted after the first block

Eg. DT1 4;DT1 5;DT1 6A;DT1 7BC

You cannot mix this with ranges, thus 'DT1 4-5' will not match as the range is not before the space.

Post Codes are of the form AB12 3CD, AB1C 2DE, A1B 2CD, A12 3BC, AB1 2CD

Postcodes Excluded

A semi-colon separated list of postcode prefixes for which this shipping class will not apply.

Leave blank to apply to all postcodes.

See Postcodes Included help text for format.

Single Line Item Only

When checked this shipping class is only allowed when there is only one line item in the basket