Introduction

A large component of running any successful eCommerce business is the effective management of the shipping function. CommerceCM includes a sophisticated Shipping Manager which will allow you to manage all your Shipping Methods based on level of service, geographic location and order size.

Landing Page

Shipping Manager is divided into three main sections:

- View the currency summary for all groups
- Edit or view Shipping Groups
- View a report of all countries, groups and rates

When you enter the main Shipping Manager page, you will start at the "View the currency summary for all groups" area. The other areas are accessible via the three links at the top left of the page:

- View the currency summary for all groups
- Edit or view shipping groups
- View a report of all countries, groups and rates

In the "View the currency summary for all groups" area, you will be able to review (by currency) all the Shipping Methods currently configured in your system. You may also filter this view by Country, Rate and Currency using the filtering construct shown below:

Countries: - Select Country -   Rates: -Select Rate -   Currencies: - Select Currency -

SHOW RESULTS

This area is also your starting point for editing existing Shipping Methods and creating new Shipping Methods (more on this later).

About Shipping Groups

Before Shipping Methods are ever set up, the first step is to determine the Shipping Groups which your Shipping Methods will apply to. Shipping Groups may be type Country, State/Province or City. Typically, the farther a shipping destination is away from the Distribution Center(s) of a company, the more expensive (and time-consuming) shipping will be.

Let's say your company has one Distribution Center only and it is located in Vancouver, BC. The cheapest destinations will then be those destinations in Vancouver or very close to Vancouver (Burnaby, Richmond, North Vancouver, etc.). It may also be true that

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shipping to cities and towns in British Columbia will be cheaper than shipping to cities and towns in Ontario. Furthermore, shipping to the United States might again be more expensive, due to customs issues. International shipping will likely be the most expensive, and the rates to various countries may fluctuate significantly. For example, shipping to the United Kingdom is probably cheaper than shipping to a country in South America.

Shipping Groups are managed by clicking on the "Edit or view Shipping Groups" link. Upon entry to the page, you will see all Shipping Groups that have currently been entered into CommerceCM via the following interface:

Shipping Group Report

Group Name	Group Type	
Australia & New Zealand	Country	🗑
Europe	Country	🗑
United Kingdom	Country	🗑
USD$International	Country	🗑
Alaska	Province	🗑
Alberta	Province	🗑
British Columbia	Province	🗑
Hawaii	Province	🗑
Lower 48	Province	🗑
Manitoba	Province	🗑
Maritimes	Province	🗑
Ontario	Province	🗑
Quebec	Province	🗑
Saskatchewan	Province	🗑
Territories	Province	🗑
Lower Mainland	City	🗑

	NEW GROUP	DONE

The Group Type column indicates the type of shipping group (country, state/province or city). Existing Shipping Groups may be edited by clicking directly on their name. New Shipping Groups may be created by clicking on the New Group button. The

Creating and Editing Shipping Groups

The interface for editing Shipping Groups and creating new Shipping Groups is virtually identical, except that once a Shipping Group has been created, the type of the Shipping Group (country, state/province or city) may not be changed.

When you click on the New Group button, the following interface will be displayed:

The first step is to select the Shipping Group type:

Country Groups

If you select the Group Type to be Country, then a list of all countries will be displayed in the Items list on the left:

State/Province Groups

If you select the Group Type to be State/Province, the interface will change to the following:

You must then select the Country for which you would like to set up a State/Province group. You may not have a State/Province group containing states/provinces from different countries (e.g. Alberta and California).

After selecting the Country, a list of all State/Provinces (for the selected country) will be displayed in the Items list on the left. Here is what this will look like when Canada is selected:

City Groups

If you select the Group Type to be City, the interface will change to the following:

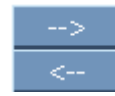You must then select the Country *and* the State/Province for which you would like to set up a City group. You may not have a City group containing cities from different State/Provinces (e.g. Calgary and Los Angeles).

After selecting the Country *and* the State/Province, a list of all cities (for the selected province) will be displayed in the Items list on the left. Here is what this will look like when Canada and British Columbia is selected:

Items

```
100 Mile House
108 Mile Ranch
150 Mile House
70 Mile House
Abbotsford
Agassiz
Ahousat
Ainsworth Hot Springs
Aiyansh
Aldergrove
Alert Bay
Alexis Creek
```

Populating the Shipping Group

Regardless of the type of Shipping Group, you will need to use the [-->] [<--] buttons between the two lists to move countries/provinces/cities into and out of your Shipping Group. The list on the left shows the list of all available items (countries, state/provinces or cities) and the list on the right show the list of all items that are currently a part of the Shipping Group. Note: if an item is part of the Shipping Group, it will show up in the list on the left in red text.

You must also name your Shipping Group. Using a clear naming convention will make life easier when it comes time to create Shipping Methods and apply them to your Shipping Groups.

Case Study for Setting up Shipping Groups

Canada Shipping Groups

Company XYZ has one Distribution Center only in Vancouver, BC. Local customers who purchase products from XYZ are offered three levels of service: Standard (three business days), Express (one business day) and Same Day (zero or one business day). For this example, we will define a local customer as any customer shipping to one of the following cities or municipalities:

Abbotsford
Burnaby
Coquitlam
Delta
Langley
Maple Ridge
Mission
New Westminster
North Vancouver
Pitt Meadows
Port Coquitlam
Port Moody
Richmond

Surrey
Vancouver
West Vancouver
White Rock

We will therefore set up a Shipping Group of type City (for British Columbia, Canada) called **Lower Mainland** which contains all the cities in the above list.

Company XYZ has discovered that the shipping rates for all western provinces are about the same, so we will therefore set up a Shipping Group of type Province (for Canada) called Western Provinces which includes BC, Alberta, Saskatchewan and Manitoba.

Similarly, Company XYZ has discovered that the shipping rates for all eastern provinces are about the same, all maritime provinces are about the same, and all territories are about the same, so we will therefore set up three more Shipping Groups of type State/Province (for Canada):

Easter Provinces	Ontario and Quebec
Maritime Provinces	New Brunswick, Newfoundland, Nova Scotia, Prince Edward Island
Territories	Northwest Territories, Yukon, Nunavut

United States Shipping Groups

Company XYZ has discovered that rates for all of the Lower 48 states are very similar, but Alaska and Hawaii are much more expensive.

So we will therefore set up a Shipping Groups of type Country and include one country only – the United States.

Next we will set up two Shipping Groups of type State/Province for each of Hawaii and Alaska. The Hawaii State/Province Shipping Group will have exactly one state in it (Hawaii) and the Alaska State/Province Shipping Group will have exactly one state in it (Alaska).

Shipping Groups for Other Countries

For the time being Company XYZ does not understand the different costs and services associated with shipping to countries in Europe and other parts of the world since they historically have sold products only in Canada and the United States. For this reason, we will set up one Country Shipping Group called International and include all countries except the United States and Canada. As time progresses, Company XYZ may elect to subdivide the "rest of the world" into places such as the United Kingdom, Western Europe, Australia etc.

This Case Study will be continued later in the document.

Setting up Shipping Methods

After setting up Shipping Groups, it is now time to set up the actual Shipping Methods that will be applied to the various Shipping Groups. A Shipping Method consists of a Shipping Method name, the Shipping Group that it applies to, and the actual rate(s).

The interface for editing Shipping Methods and creating new Shipping Methods is virtually identical, and is handled in four steps. To create a new Shipping Method, type in the name of the Shipping Method and the Description for the Shipping Method.

Note: Your customers will see the Name and Description. Many CommerceCM Administrators use terms like "Standard" and "Express" to name their rates, and use specification like "six to Business Days" for the description.

Clicking on the Next button will take you to Step 2 of 4 and a page that looks like the following:

If you have more than one Language configured in CommerceCM, you will have to type in the Name and Description for each language. Clicking on the Next button will you to Step 3 of 4 and a page that looks like the following:

Step 3 of 4

Name: Standard - British Columbia
Currency: CAD

Shipping Destinations

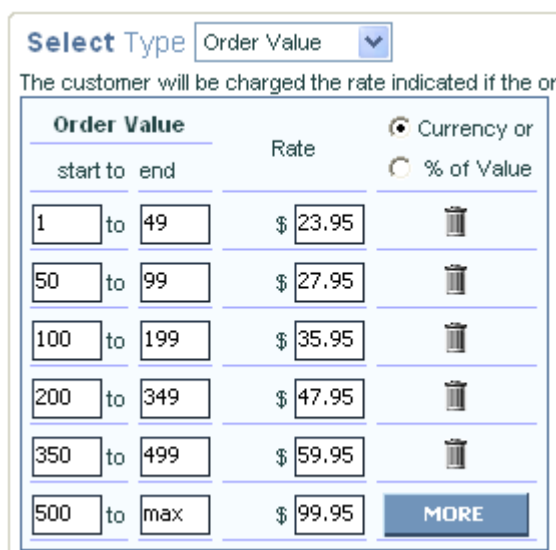Select Region Group(s)

Region Groups	Selected Groups
Country	---British Columbia
---Australia & New Zealand	
---Europe	
---United Kingdom	
---USD$International	
Province	
---Alaska	
---Alberta	
---British Columbia	
---Hawaii	
---Lower 48	
---Manitoba	
---Maritimes	
---Ontario	
---Quebec	
---Saskatchewan	
---Territories	
City	
---Lower Mainland	

In Step 3, you must select the Shipping Group(s) for which the Shipping Method will apply.

You will need to use the [-->] [<--] buttons between the two lists to control which Shipping Groups are to use the Shipping Method. The list on the left shows the list of all available Shipping Groups and the list on the right show the list of all Shipping Groups that are currently set up to use the Shipping Method. Note: if a Shipping Group is being used by the Shipping Method (i.e. if it is a part of the list on the right), it will show up in the list on the left in red text.

Clicking on the Next button will you to Step 4 of 4 and a page that looks like the following:

Shipping Prices

Name: Standard - British Columbia
Currency: CAD

Select Type Order Value

The customer will be charged the rate indicated if the order value is within the range specified.

Order Value start to end	Rate	⊙ Currency or ○ % of Value
1 to 50	$ 8.45	🗑
51 to 100	$ 9.95	🗑
101 to 200	$ 12.95	🗑
201 to 350	$ 13.95	🗑
351 to 500	$ 21.95	🗑
501 to max	$ 36.95	MORE

CANCEL   DONE

This is the step in which you will specify the actual rate(s) for the Shipping Method. You must first select the type of rate that will be applied using the combo box, and also the Rate Calculation method via the Radio Buttons. There are three valid combinations:

Order Value – Currency	This option allows you to specify shipping rates based on the total dollar amount of the order. You can create a series of dollar amount ranges by successively clicking on the More button. A sample rate series is shown below:
	Select Type Order Value The customer will be charged the rate indicated if the or Order Value start to end — Rate — ⊙ Currency or ○ % of Value 1 to 49 — $ 23.95 — 🗑 50 to 99 — $ 27.95 — 🗑 100 to 199 — $ 35.95 — 🗑 200 to 349 — $ 47.95 — 🗑 350 to 499 — $ 59.95 — 🗑 500 to max — $ 99.95 — MORE Note the use of the word "max". This convention will ensure high dollar amount orders will still be assigned a rate.
Order Value – % of Value	This option also allows you to specify shipping rates based on the total dollar amount of the order. However, in this case the rate is a percentage of the total order value. You can create a

	series of dollar amount ranges by successively clicking on the More button. In many cases, one range will suffice using this setting, as per the sample rate shown below where shipping will always be 5% of the order sub-total:
Per Item Range	This option allows you to specify shipping rates based on the number of items in the order.

Case Study for Setting up Shipping Methods

Recall, Company XYZ has one Distribution Center only in Vancouver, BC. Recall, we have already set up the following Shipping Groups:

Shipping Group	Type	Description
Lower Mainland	City	Cities very close to Company XYZ's Vancouver Distribution Center
Western Provinces	State/Province	Canada: BC, Alberta, Saskatchewan and Manitoba
Eastern Provinces	State/Province	Canada: Ontario and Quebec
Maritime Provinces	State/Province	Canada: New Brunswick, Newfoundland, Nova Scotia, Prince Edward Island
Territories	State/Province	Canada: Northwest Territories, Yukon, Nunavut
Lower 48	Country	United States
Alaska	State/Province	Alaska
Hawaii	State/Province	Hawaii
International	Country	All countries except for Canada and United States

For the Lower Mainland Shipping Group, Company XYZ will set up three Shipping Methods as per the following:

Name	Description	Rate
Standard	3 business days	Order between $0-$49: $2.95 Order between $50-$99: $3.95 Order $100 or more: $4.95
Express	1 business day	Order between $0-$49: $5.95 Order between $50-$99: $6.95 Order $100 or more: $7.95
Same Day	0 or 1 business day	Order between $0-$49: $7.95 Order between $50-$99: $8.95 Order $100 or more: $9.95

For the Western Provinces Shipping Group, Company XYZ will set up two Shipping Methods as per the following:

Name	Description	Rate
Standard	3 business days	Order between $0-$49: $5.95 Order between $50-$99: $6.95 Order $100 or more: $7.95
Express	1 business day	Order between $0-$49: $7.95 Order between $50-$99: $8.95 Order $100 or more: $9.95

For the Eastern Provinces Shipping Group, Company XYZ will set up two Shipping Methods as per the following:

Name	Description	Rate
Standard	3 business days	Order between $0-$49: $6.95 Order between $50-$99: $7.95 Order $100 or more: $8.95
Express	1 business day	Order between $0-$49: $8.95 Order between $50-$99: $9.95 Order $100 or more: $10.95

For the Maritime Provinces Shipping Group, Company XYZ will set up two Shipping Methods as per the following:

Name	Description	Rate
Standard	3 business days	Order between $0-$49: $7.95 Order between $50-$99: $8.95

		Order $100 or more: $9.95
Express	1 business day	Order between $0-$49: $9.95 Order between $50-$99: $10.95 Order $100 or more: $11.95

For the Territories Provinces Shipping Group, Company XYZ will set up two Shipping Methods as per the following:

Name	Description	Rate
Standard	3 business days	Order between $0-$49: $10.95 Order between $50-$99: $11.95 Order $100 or more: $12.95
Express	1 business day	Order between $0-$49: $12.95 Order between $50-$99: $13.95 Order $100 or more: $14.95

For the Lower 48 Shipping Group, Company XYZ will set up two Shipping Methods as per the following:

Name	Description	Rate
Standard	3 business days	Order between $0-$49: $10.95 Order between $50-$99: $11.95 Order $100 or more: $12.95
Express	1 business day	Order between $0-$49: $12.95 Order between $50-$99: $13.95 Order $100 or more: $14.95

For the Alaska Shipping Group, Company XYZ will set up two Shipping Methods as per the following:

Name	Description	Rate
Standard	3 business days	Order between $0-$49: $15.95 Order between $50-$99: $16.95 Order $100 or more: $17.95
Express	1 business day	Order between $0-$49: $29.95 Order between $50-$99: $29.95 Order $100 or more: $29.95

For the Hawaii Shipping Group, Company XYZ will set up two Shipping Methods as per the following:

Name	Description	Rate
Standard	3 business days	Order between $0-$49: $15.95 Order between $50-$99: $16.95 Order $100 or more: $17.95
Express	1 business day	Order between $0-$49: $24.95 Order between $50-$99: $24.95 Order $100 or more: $24.95

View Report Of All Countries, Groups And Rates

The third main area of Shipping Manager is the reporting area. This area of Shipping Manager allows you to review your rates by Country to see what Shipping Groups and Shipping Methods are applicable for each country. The colour codes will be useful to assist in quickly identifying countries that have missing Shipping Groups or Shipping Methods:

■	Shipping Group or Shipping Method is Complete.
■	Some Shipping Groups are Missing Rate Data.
■	There is no rate data.