Tutorial 10: Configure Shipping, Handling, and Taxes

Objectives:

Your goal in this tutorial is to be able to:

- customize shipping charges by each of these methods:
 - UPS lookup based on zip code and average weight
 - > UPS lookup based on zip code and order weight
 - > shipping table by quantity
 - > shipping table by price
- customize handling charges
 - handling charges according to quantity
 - handling charges according to price
- customize taxes
- view, test and debug your changes

In NetStores you can easily set up shipping and handling charges according to a number of different options, and you can set up taxes to be charged based on the state where the order originates.

Configure Shipping Charges

NetStores provides you with a number of shipping options. You can offer your customers next day, 2nd day, 3rd day and ground shipping. If you use UPS, NetStores can calculate the shipping charges for you based on the average weight of your products or on the weight of the order and the zip code of the destination. Alternatively, you can set up a shipping table based on either the quantity or price of items ordered.

To configure the shipping charges for your store on the NetStores server, follow the directions below:

- In your Internet browser, login to NetStores as instructed at the beginning of Tutorial 9.
- In the NetStores Merchant Administration Area, under Configuration click Configure Your Store (Fig. 9.3).
- Click Miscellaneous Charges (Fig. 10.1).

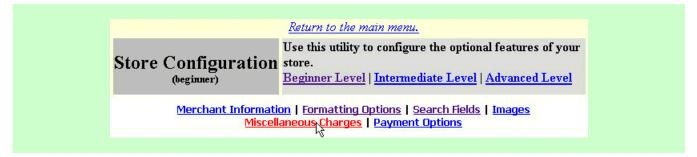


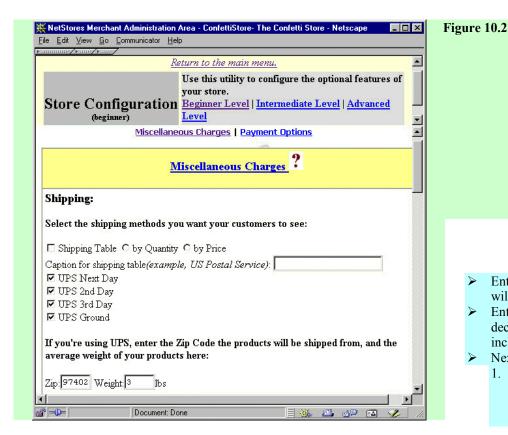
Figure 10.1 In Store Configuration, click Miscellaneous Charges.

To continue, decide which method of calculating shipping charges you want to use and follow the instructions within one of the subsequent sections as appropriate.

UPS Lookup Using Average Weight

If you prefer to use UPS and you do not have weight information in the item file for each individual item, you can have NetStores look up the shipping charges based on the average weight of your items, by following these instructions:

Select the varieties of shipping you would like to offer by marking the check boxes for UPS Next Day, 2nd Day, 3rd Day and/or Ground (Fig. 10.2).



Using UPS, select the varieties of shipping you would like to offer by marking the check boxes for UPS Next Day, 2nd Day, 3rd Day and/or Ground. Next, enter the zip code from which you will be shipping items. Then enter the average weight in decimal pounds of your products, including the packaging materials.

- Enter the zip code from which you will be shipping items (Fig. 10.2).
- Enter the average weight in decimal pounds of your products, including the packaging materials.
- Next do one of the following:
 - 1. Scroll to the bottom of the *Miscellaneous Charges* page and click **Save Changes** (Fig. 10.3).

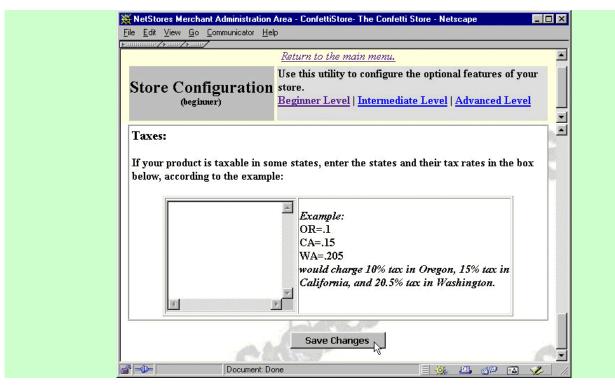


Figure 10.3 Scroll to the bottom of the Miscellaneous Charges page and click Save Changes.

- 2. Alternatively, skip to the handling charges section.
- 3. On the other hand, if you want to view shipping charges, skip to the last section in this tutorial.

If you use this method, UPS shipping charges will be calculated for you based on zip code and average weight and number of items purchased. The main advantage of this method is that you do not need to enter shipping weights of each item into the item file. An order might look like Figure 10.4 if you used this method of shipping calculations.

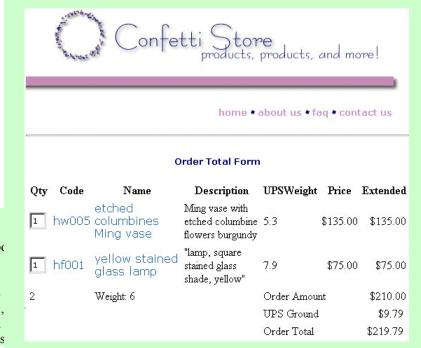


Figure 10.4 An order might look like this example if you used the UPS average weight lookup methor of shipping calculations.

Notice that the weight calculated, in this example, is based on the average of 3 lbs., entered in Figure 10.2, not on the actual weights of the items

UPS Lookup Using Individual Weights of Items

You can use the UPS lookup with different weights of each item, if you have included their weights in the item file. See Tutorial 3. This method is more accurate, but takes more work. It will charge customers ordering heavier items more than customers ordering lighter items.

To calculate UPS shipping charges based on order weight and zip code, follow these instructions:

- Select the varieties of shipping you would like to offer by marking the check boxes for UPS Next Day, 2nd Day, 3rd Day and/or Ground (Fig. 10.2).
- Enter the zip code from which you will be shipping items (Fig. 10.2).
- Scroll to the bottom of the *Miscellaneous Charges* page and click **Save Changes** (Fig. 10.3).
- **▶** Click Continue Store Configuration (Fig. 10.5).



Figure 10.5 Click Continue Store Configuration.

Click Search Fields (Fig. 10.6).



Figure 10.6 Click Search Fields.

- ➤ In the *Field Names* form, scroll down to row 8, *UPSWeight*.
- In the third column, in row 8, select **UPS Weight** from the drop-down menu (Fig. 10.7).

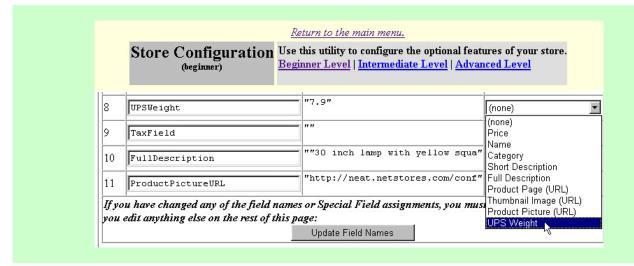


Figure 10.7 Field Names form. In the third column, in row 8 select UPS Weight from the drop-down menu. Then click Update Field Names.

- Click Update Field Names (Fig. 10.7).
- Scroll to the bottom of the Search Fields page and click Save Changes (Fig. 10.8).

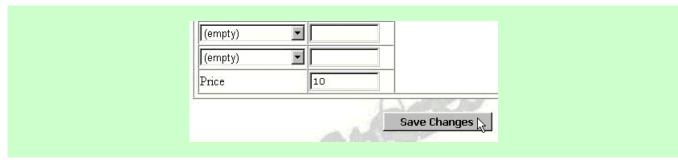


Figure 10.8 Scroll to the bottom of the *Search Fields* page and click **Save Changes**.

- ➤ Click Continue Store Configuration (Fig. 10.5).
- Make sure your item file includes shipping weights of each item; see Tutorial 3 for details.
- Continue with handling charges by clicking **Miscellaneous Charges** and skip to the section called *Configure Handling Charges*, or if you want to view shipping charges, skip to the last section in this tutorial

This method calculates UPS shipping charges for you based on zip code and weight of the order. It requires the inclusion of shipping weights in the item file, but is more accurate in estimating the actual cost of shipping. If you viewed an order (see the last section of this tutorial) at this point, it might look something like the example shown in Fig. 10.9.

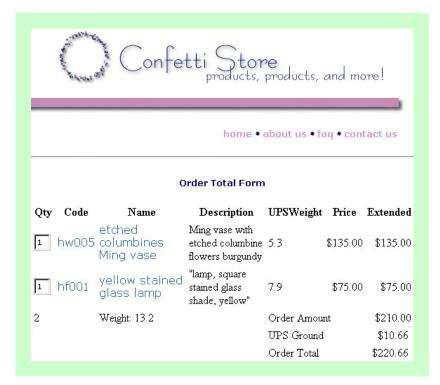


Figure 10.9 If you viewed an order (see the last section of this tutorial) at this point, it might look something like this example. Now the weight calculated is the sum of the actual weights from the item file.

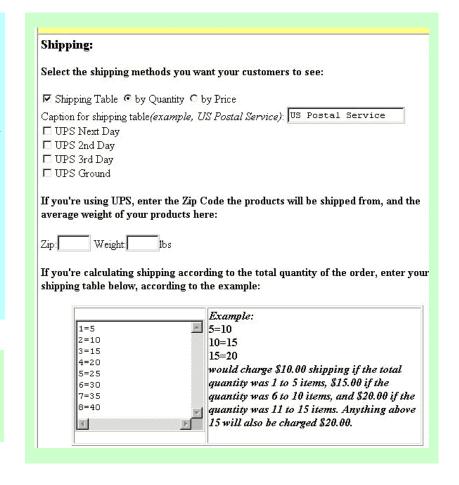
Shipping Table by Quantity

If you prefer to set up your own table of shipping costs based on the number of items being shipped, follow the instructions below:

- Open the Miscellaneous Charges page as instructed at the beginning of this tutorial.
- Mark the *Shipping Table* check box (Fig. 10.10).
- Select the *by Quantity* radio button (Fig. 10.10).

- Enter your shipper's name, such as UPS, FedEx or US Postal Service in the text box for *Caption for shipping table* (Fig. 10.10).
- In the first large text box left of the word *Example*, on each line, enter the order quantity, followed by an = sign, followed by the shipping cost for that quantity. We entered 1=5, 2=10, 3=15, etc. (Fig. 10.10). This means 1 item costs \$5 to ship, 2 items cost \$10 to ship, etc. If you skip a number of items, the next higher number shipping charge will apply. For example, if you entered 1=5 and 3=15, then both 2 and 3 items would cost \$15 to ship (Fig. 10.10).

Figure 10.10 Fill in the shipping table as instructed. In this example, each item costs an additional \$5 to ship so that shipping for 8 items costs \$40.



- Next do one of the following:
 - 1. Scroll to the bottom of the *Miscellaneous Charges* page and click **Save Changes** (Fig. 10.3).
 - 2. Alternatively, skip to the handling charges section.
 - 3. On the other hand, if you want to view shipping charges, skip to the last section in this tutorial.

You can examine the results of this change by following the instructions in the section *View Shipping Charges* at the end of this tutorial. Figure 10.11 shows the resulting *Order Total Form* for 2 items.



Figure 10.11 Order Total Form for 2 items using the shipping table set up in Figure 10.10. Notice that the shipping charge for 2 items is \$10.

Shipping Table by Price

Another way to set up your shipping charges is to use a table of shipping costs based on the total price of items ordered.

If you prefer this method, follow the instructions below:

- > Open the *Miscellaneous Charges* page as instructed at the beginning of this tutorial.
- ➤ Mark the *Shipping Table* check box (Fig. 10.12).
- Select the *by Price* radio button (Fig. 10.12).
- ➤ Enter your shipper's name, such as UPS, FedEx or US Postal Service in the text box for *Caption for shipping table* (Fig. 10.12).

Figure 10.12 Mark the Shipping Table check box and select the by Price radio button. Enter your shipper's name, such as UPS, FedEx or US Postal Service in the text box for Caption for shipping table.



Scroll down to the second large text box, just above the handling section, and on each line, enter the total order price, followed by an = sign, followed by the shipping cost for that order price. We entered 100=5, 200=10, 300=15, etc. (Fig. 10.13). This means each \$100 worth of items costs an additional \$5 to ship so that shipping for \$700.01 to \$800 worth costs \$40. Between the ranges of order price, the next higher number shipping charge will apply. For example, an order worth \$425 would cost \$25 to ship (Fig. 10.13).

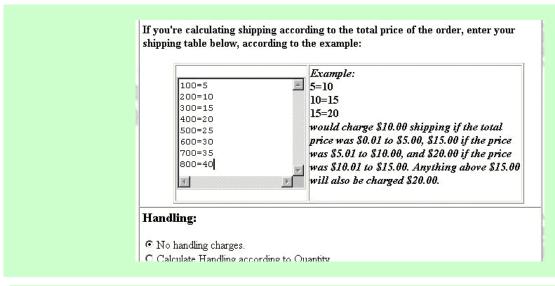


Figure 10.13 Fill in the shipping table as instructed. In this example, each \$100 worth of items costs an additional \$5 to ship so that shipping for \$800 worth costs \$40.

- Next do one of the following:
 - > Scroll to the bottom of the *Miscellaneous Charges* page and click **Save Changes** (Fig. 10.3).
 - Alternatively, skip to the handling charges section.
 - > On the other hand, if you want to view shipping charges, skip to the last section in this tutorial.

You can examine the results of using a shipping table based on price by following the instructions in the section *View Shipping Charges* below. Figure 10.14 shows the resulting *Order Total Form* for \$210 worth of items.



Figure 10.14 Order Total Form for 2 items costing \$210, using the shipping table set up in Figure 10.13. Between \$200.01 and \$300 results in a \$15 shipping charge.

Configure Handling Charges

NetStores allows you to set up handling charges in addition to shipping charges. You can either calculated handling costs based on the quantity or the price of items sold. In each case you set up a shipping table similar to shipping charges, either by quantity or price.

Handing According to Quantity

To set up a table to calculate handling costs based on the quantity of items ordered, follow these instructions:

- > If it is not already open, display the *Miscellaneous Charges* page as instructed at the beginning of this tutorial.
- Scroll down to *Handling* (Fig. 10.15).
- Select the radio button marked *Calculate Handling according to Quantity* (Fig. 10.15).
- In the large text box left of the word *Example*, on each line, enter the order quantity, followed by an = sign, followed by handling cost. We entered 1=2, 2=4, 3=5, etc. (Fig. 10.15). This means 1 item has \$2 handling costs, 2 items cost \$4, etc. If you skip a number of items, the next higher number handling charge will apply. For example, we enter 5=6 and 10=7, so handling for any number of items from 6 to 10 costs \$7 (Fig. 10.15).
- Scroll to the bottom of the page and click **Save Changes** (Fig. 10.3), or continue on to the taxes section below.

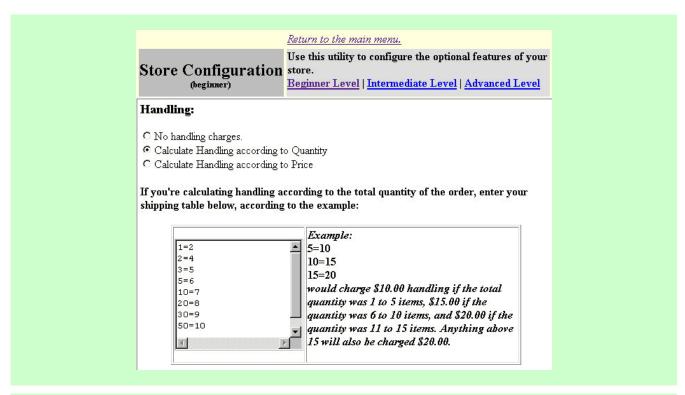


Figure 10.15 Example setup for table to calculate handling costs according to the quantity of items ordered. In this example, the handling for one item costs \$2, 2 items cost \$4, 3 items cost \$5, 4 or 5 items cost \$6, 6 to 10 items cost \$7, 11 to 20 items cost \$8, 21 to 30 items cost \$9 and 31 to 50 items cost \$10.

You can examine the results of this change by following the instructions at the heading *View Shipping, Handling and Tax Charges* at the end of this tutorial. Figure 10.16 shows the resulting *Order Total Form* for 2 items.



Figure 10.16 Order Total Form for 2 items with a handling charge of \$4, using the table set up in Figure 10.15.

Handing According to Price

Another way to set up your handling charges is to use a table of costs based on the total price of items ordered. If you prefer this method, follow the instructions below:

- > If it is not already open, go to the *Miscellaneous Charges* page as instructed at the beginning of this tutorial.
- Scroll down to *Handling* (Fig. 10.17).
- > Select the radio button marked *Calculate Handling according to Price* (Fig. 10.17).
- > Scroll down to the second large text box, just above the *Taxes* section, and enter up to total price=handling cost on each line. We entered 100=2, 200=4 etc. (Fig. 10.18). This means that \$0.01 to \$100 worth of item costs \$2 in handling charges, \$100.01 to \$200 worth cost \$4, etc. (Fig. 10.18).

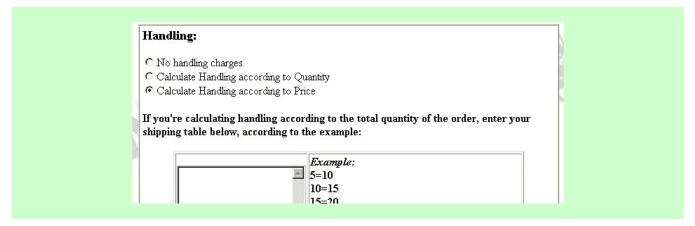
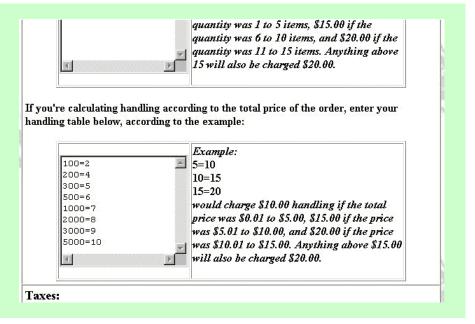


Figure 10.17 Select the radio button marked Calculate Handling according to Price.

Figure 10.18 Calculation table for handling according to the total price of the order. In this example, an order worth \$0.01 t \$100 costs \$2 in handling charges, worth \$100.01 to 200 costs \$4, \$200.01 to 300 costs \$5, \$300.01 to 500 costs \$6 and so on.



➤ Scroll to the bottom of the *Miscellaneous Charges* page and click **Save Changes** (Fig. 10.3), or continue to the taxes section.

You can examine the results of using a handling table based on price by following the instructions in the section at the end of this tutorial. Figure 10.19 shows the resulting *Order Total Form* for \$210 worth of items.



Figure 10.19 Order Total Form for 2 items costing \$210, using the handling table set up in Figure 10.17.

Notice that for an order of \$210.00 the handling charge of \$5 for \$200.01-\$300 applies.

Configure Taxes

Now you are ready to set up tax handling on your NetStores account. First be sure you know what sales taxes you are legally required to pay. You can set these up by state by following the instructions below:

- > If it is not already open, display the *Miscellaneous Charges* page as instructed at the beginning of this tutorial.
- Scroll down to the *Taxes* section (Fig. 10.20).

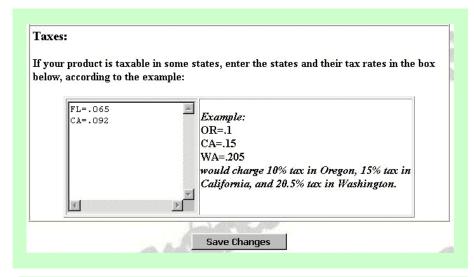


Figure 10.20 *Taxes* section of *Miscellaneous Charges* page. These entries in the tax table will cause a charge of 6.5% for Florida orders and 9.2% for California orders.

- For a state that requires you to pay sales taxes, enter the state abbreviation, followed by an = sign, then the tax rate proportion for that state (not a percentage). For example, if you need to charge 6.5% sales tax in the state of Florida, enter FL=.065 (Fig. 10.20).
- Enter a similar line for each additional state (Fig. 10.20).
- Click Save Changes (Fig. 10.20).

To view the tax charges the customer needs to fill in his or her address information. See the section below to view the tax charges. Figure 10.21 illustrates tax charges for a customer in California based on the entries in Figure 10.20.



Figure 10.21 After filling out customer address information (see section *View Tax Charges* below), the taxes can be calculated as shown here for a customer in California. The tax rate for this example was set up in Figure 10.20.

View Shipping, Handling and Tax Charges

After saving your modifications of shipping, handling and tax charges, you can see how the charges appear on the *Order Total Form* by following these instructions:

- Scroll to the bottom of the *Miscellaneous Charges* page and click **Save Changes** (Fig. 10.4).
- Click View Your Store Settings (Fig. 10.22).

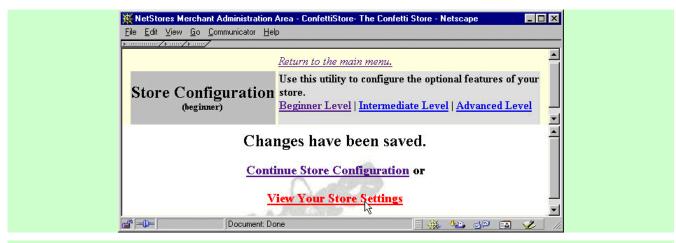


Figure 10.22 Click View Your Store Settings.

> If you have already experimented with ordering a few items you can go directly to the **Check Order Page** (Fig. 10.23).



Figure 10.23 If you have already experimented with ordering, click Check Order Page.

➤ Otherwise, click **Order Form Page** (Fig. 10.24), and select a few items to order by entering a quantity in the text box (Fig. 10.25) and then scroll down and click **Add/View Order** (Fig. 10.26).



Figure 10.24 If you have not experimented with ordering yet, click Order Form Page.

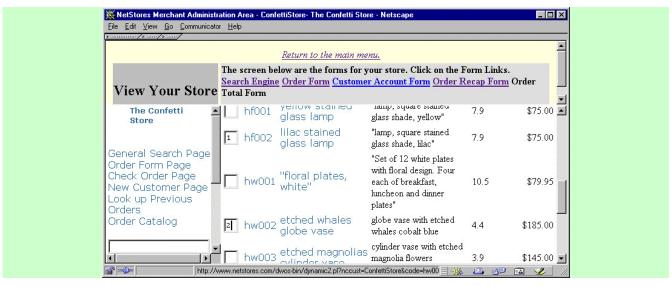


Figure 10.25 In the Order Form page select some pieces as if you were ordering.

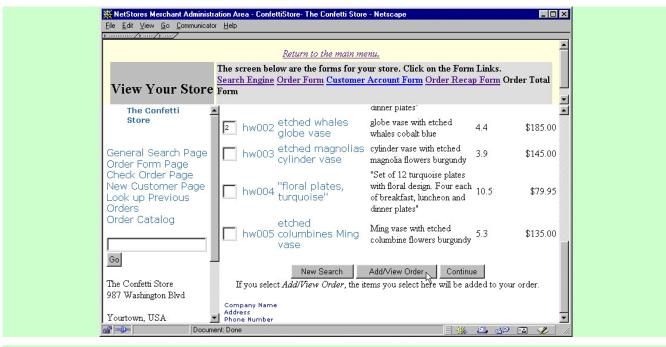


Figure 10.26 In the Order Form page click Add/View Order.

Next click **Checkout** (Fig. 10.27).



Figure 10.27 Order Recap Form. Click Checkout.

- Fill in name and address information as if you were a customer (Fig. 10.28). Use a valid e-mail address.
- Click Complete Your Order at the bottom of the form (Fig. 10.28).



Figure 10.28 *Customer Information* form. a. At the top of the form, enter a customer account and password if you already have one, or scroll down.

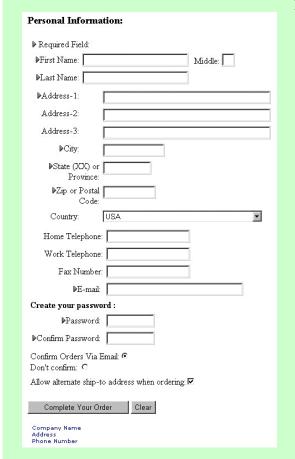


Figure 10.28 continued. b. After scrolling down, fill in the *Personal Information* part of the form with name and address information as if you were a customer. Use a valid email address. Then click **Complete Your Order** at the bottom of the form.

A responding screen may appear like Figure 10.29. Click Complete Your Order.



Figure 10.29 After filling out customer information, NetStores responds with a screen like this one. Click **Complete Your Order**.

Examine the shipping, handling and tax charges and order total (Fig. 10.30).



Figure 10.30 Top of the *Order Total Form* with shipping, handling and taxes calculated.

➤ If you are using UPS, the UPS Ground rate is automatically calculated but the customer can select a different method of delivery by scrolling to the bottom of the form and selecting one from the drop-down menu (Fig. 10.31).



Figure 10.31 Bottom of the *Order Total Form*. The customer can select the type of shipping such as next or 2nd day and then click **Modify** to recalculate the shipping.

- The customer can also enter a different shipping address at the bottom of the *Order Total Form* (Fig. 10.31).
- The shipping charges will be recalculated accordingly (Fig. 10.32).
- Click Return to main menu.

Figure 10.32 Shipping charges have been recalculated for 2nd Day delivery.

Qty	Code	Name	Description	UPSWeight	Price	Extended
1	hf002	lilac stained glass lamp	"lamp, square stained glass shade, lilac"	7.9	\$75.00	\$75.00
2	hw002	etched whales globe vase	globe vase with etched whales cobalt blue		\$185.00	\$370.00
3		Weight: 16.7		Order Amou	nt	\$445.00
				UPS 2nd Day	У	\$42.31
				Handling Cha	arge	\$6.00
				Tax: 6.5%		\$28.93
				Order Total		\$522.24

After completing this tutorial, you should be able to configure your store with shipping, handling and tax information. You learned four different ways to set up shipping charges, two using UPS prices, based on zip code and the average item weight or the weight of the order, and two using shipping tables, based on quantity or price of the order. You learned how to set up tables to charge for handling based on the quantity or price of the order. You also learned how to set up tax charges for each state for which you need to pay sales tax. Finally, you should now know where to view the shipping, handling and tax charges for an order.