# 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, $2^{\text {nd }}$ day, $3^{\text {rd }}$ 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, $2^{\text {nd }}$ Day, $3^{\text {rd }}$ Day and/or Ground (Fig. 10.2).


Figure 10.2 Using UPS, select the varieties of shipping you would like to offer by marking the check boxes for UPS Next Day, $2^{\text {nd }}$ Day, $3^{\text {rd }}$ 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, $2^{\text {nd }}$ Day, $3^{\text {rd }}$ 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 $\$ 40$.

## Shipping:

Select the shipping methods you want your customers to see:
$\sqrt{ }$ Shipping Tablec by Quantity $C$ by Price
Caption for shipping table(example, US Postal Service): US Postal Service
$\Gamma$ UPS Next Day
$\Gamma$ UPS 2nd Day
$\Gamma$ UPS 3rd Day
$\Gamma$ UPS Ground
If you're using UPS, enter the Zip Code the products will be shipped from, and the average weight of your products here:
$\mathrm{Zip}: \square$ Weight: $\square \mathrm{lbs}$
If you're calculating shipping according to the total quantity of the order, enter your shipping table below, according to the example:

|  |  | Example: |
| :---: | :---: | :---: |
| $1=5$ | $\triangle$ | $5=10$ |
| $2=10$ |  | $10=15$ |
| $3=15$ |  | 15=20 |
| $4=20$ $5=25$ |  | would charge \$10.00 shipping if the total |
| 6=30 |  | quantity was 1 to 5 items, \$15.00 if the |
| 7=35 |  | quantity was 6 to 10 items, and \$20.00 if the |
| $8=40$ | $\checkmark$ | quantity was 11 to 15 items. Anything above |
| - | $\pm$ | 15 will also be charged \$20.00. |

$>$ 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

Miscellaneous Charges

## Shipping：

Select the shipping methods you want your customers to see：
$\sqrt{V}$ Shipping Table $C$ by Quantity $C$ by Price
Caption for shipping table（example，US Postal Service）：US Postal Service
$\Gamma$ UPS Next Day
$\Gamma$ UPS 2nd Day
$\Gamma$ UPS 3rd Day
$\Gamma$ UPS Ground

| Miscellaneous Charges ？ |
| :--- |
| Shipping： |
| Select the shipping methods you want your customers to see： |
| 『 Shipping Table C by Quantity © by Price |
| Caption for shipping table（example，US Postal Service）：US Postal Service |
| 「UPS Next Day |
| 「UPS 2nd Day |
| 「UPS 3rd Day |
| 「UPS Ground |

$>$ 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).

If you're calculating shipping according to the total price of the order, enter your shipping table below, according to the example:


```
Handling:
c No handling charges.
C-Calrulate Handlino arrordino to Onantitu
```

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.


## 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).

## Handling:

$C$ No handling charges.
C Calculate Handling according to Quantity
c Calculate Handling according to Price
If you're calculating handing according to the total quantity of the order, enter your shipping table below, according to the example:

|  | $\Delta$Example: <br> $5=10$ <br> $10=15$ <br> $15=30$ |  |
| :---: | :--- | :--- |

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 $\$ 0.01 \mathrm{t}$ $\$ 100$ 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.


If you're calculating handling according to the total price of the order, enter your handling table below, according to the example:

|  |  | Example: |
| :---: | :---: | :---: |
| 100=2 | $\triangle$ | $5=10$ |
| $200=4$ |  | $10=15$ |
| $300=5$ $500=6$ |  | $15=20$ |
| $\left\lvert\, \begin{aligned} & 500=6 \\ & 1000=7 \end{aligned}\right.$ |  | would charge \$10.00 handing if the total |
| $2000=8$ |  | price was \$0.01 to \$5.00, \$15.00 if the price |
| $3000=9$ |  | was $\$ 5.01$ to $\$ 10.00$, and $\$ 20.00$ if the price |
| $5000=10$ | $\checkmark$ | was \$10.01 to \$15.00. Anything above \$15.00 |
| $\square$ | $\square$ | will also be charged \$20.00. |

Taxes:

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

Confetti Seroducts, products, and more!
home * about us * faq * contact us

Order Total Form

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

$$
\mathrm{FL}=.065
$$

(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.

## Personal Information:



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).


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).
Company Name
Company Name
Address
Phone Number

Figure 10.31 Bottom of the Order Total Form. The customer can select the type of shipping such as next or $2^{\text {nd }}$ 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 $2^{\text {nd }}$ 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 | 4.4 \$ | \$185.00 | \$370.00 |
| 3 |  | Weight: 16.7 |  | Order Amount |  | \$445.00 |
|  |  |  |  | UPS 2nd Day |  | \$42.31 |
|  |  |  |  | Handling Charg |  | \$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.

