

WebShopApps MatrixRate Shipping Module

See my growing list of extensions at www.webshopapps.com

Overview

The Matrixrate shipping extension provides the original multiple tablerate shipping calculation solution for Magento websites, allowing shipping rates to be calculated using the following criteria:

- Destination
- Weight, Price or # Items

Matrixrate has the following additional capabilities:

1. Completely csv driven, no coding required to change prices, add rates, etc
2. Allows multiple postage rates to be displayed for the customer to choose in particular country/city/region/zipcode/condition range, where condition can be weight, price or #items
3. Zipcode based filtering. Can either use the basic “starts with” criteria, or more complex pattern matching
4. Support for numerical zipcode ranges – e.g. specify a price that applies to all postcodes within the range 9755-9999
5. To be able to specify an upper and lower boundary for price, weight, or item vs destination rates

The management of shipping rates is done via a csv file, which is uploaded to the database. Shipping calculations are then done via sql searches, providing efficient results.

Installation

The module can now be installed via Magento Connect. Details can be found here:

<http://www.magentocommerce.com/extension/604/webshopapps-matrixrate>

It is highly recommended to backup your server files and database before installing this module. No responsibility can be taken for any adverse effects it may cause. It is also recommended you install on a test server initially to carry out your own testing.

Getting Started with Webshopapps MatrixRate

1. Open Magento Admin
2. Refresh Cache
3. Within 'Configuration->Shipping Methods' you should have a shipping method available called "Webshopapps Matrix Rates"
4. Enable Webshopapps Matrix Rates

Current Configuration Scope:

Default Config

[Manage Stores](#)

Configuration

GENERAL

General

Web

Design

Currency Setup

Store Email Addresses

Contacts

CATALOG

Catalog

Inventory

Google Sitemap

RSS Feeds

Email to a Friend

CUSTOMERS

Newsletter

Customer Configuration

Wishlist

SALES

Sales

Sales Emails

PDF Print-outs

Tax

Checkout

Shipping Settings

Shipping Methods

Shipping Methods

[Save Config](#)

Flat Rate

Webshopapps Matrix Rates

This module was developed by www.webshopapps.com - we specialise in Magento Shipping Extensions. We have over 60 shipping extensions available. For setup assistance refer to [app/code/community/Auctionmaid/docs](#) and examples in [app/code/community/Auctionmaid/examples](#). Need more functionality - see [Premium Matrixrate](#). Follow us on [twitter](#)

Enabled

Title

Method name

Condition

Free shipping promotions

Only display free shipping

Free shipping display text

Free shipping with minimum order amount

Minimum order amount for free shipping

Use zipcode to/from range

Exclude Virtual from Cart Price

Calculate handling fee

Displayed error message

5. Set values as appropriate
6. Save Config
7. Change 'Current Configuration Scope' to be the Main Website (or your website view)

Current Configuration Scope: Main Website Store

Shipping Methods

Save Config

Flat Rate

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This module was developed by www.webshopapps.com - we specialise in Magento Shipping Extensions. We have over 60 shipping extensions available. For setup assistance refer to [app/code/community/Auctionmaid/docs](#) and examples in [app/code/community/Auctionmaid/examples](#). Need more functionality - see [Premium Matrixrate](#). Follow us on [twitter](#).

Enabled: Yes ☒ Use default

Title: matrixrate ☒ Use default

Method name: MatrixRate ☒ Use default

Condition: Weight vs. Destination ☒ Use default

Free shipping promotions: Disable ☒ Use default

Only display free shipping: Yes ☒ Use default

Free shipping display text: Free Shipping ☒ Use default

Free shipping with minimum order amount: Enable ☒ Use default

Minimum order amount for free shipping: 50 ☒ Use default

Use zipcode to/from range: No ☒ Use default

Import: Browse...

Exclude Virtual from Cart: Yes ☒ Use default

Price:

Calculate handling fee: Fixed ☒ Use default

8. You should now see an import button box appear with a browse box in Matrix Rates. Browse to a CSV file. Details of CSV file configuration can be found below
9. Save the config to upload the CSV. Any errors in the CSV will be reported here
10. If using zipcode numeric ranges then set "Use Zipcode To/From" range to yes (see below for more info on this)
11. Ensure your products are setup correctly according to rules in CSV file
12. You should then see the appropriate shipping rates appear on the front end upon checkout

Applying Criteria

In order to set up the csv file it is necessary to understand the various criteria you have control over. Many of these may be irrelevant to you, if so use the defaults suggested.

The shipping extension works on a "Best Match" basis. This means it will look for the tightest match first, then work backwards if none can be found. For example if you have 2 rows in the csv, 1 with country code of "US" and one with "*", then a customer from the US will match on the US row, and a customer from UK will match on the "*" row.

CSV Format Options

From version 2.0 of the extension there are 2 different length csv files supported. One is 7 columns, the other 9 columns.

To decide which you need answer these questions:

1. I need to support **numerical** postcode ranges e.g. 9700-9750
2. I need to support postage rates based on city customer resides in

3. I need to support postcode rates other than using “starts with” criteria.

For example if you only need to support say codes that start with BT as a special case then you would answer no, but if you need to support codes that start with PO1 and PO14 as separate cases then you would answer yes.

If you answer yes to any of the above questions then you need the 9 column csv file. Please refer to the appropriate section below. I highly recommend you look at both sections so as to familiarise yourself with the possible csv combinations.

7 Column CSV File Format

The CSV file consists of 7 fields:

Field Name	Type	Description
Country	String	ISO3 Country code this rate applies to. Use '*' for all.
Region/State	Decimal	Defined region code this rate applies to. Use '*' for all.
Zip/Postal code	String	Part, or all of postcode to restrict this rate by, e.g. BT denotes this rate only applies to Northern Ireland. Use '*' for all.
Condition from	Real	Starting weight,price or #items at which this shipping rate applies
Condition to	Real	Ending weight,price or #items at which this shipping rate applies
Shipping Price	Real	Price of shipping
Delivery Type	String	Text describing this delivery, as shown to the customer, e.g. “Via 24-48 Courier”

Example 7 Column CSV file

Country	Region/State	Zip/Postal Code	Weight From	Weight To	Shipping Price	Delivery Type
GBR	*	*	0	5	2.99	1 st Class Recorded
GBR	*	*	0	31.99	7.99	Parcelforce 24-48
GBR	*	*	32	1000	80	Special Pallet Delivery
GBR	*	*	2000	2100	0	Collection only
GBR	*	BT	0	5	11.99	1 st Class Recorded
GBR	*	BT	0	32	14.99	Parcelforce 24-48
GBR	*	BT12	0	1000	200	Special Pallet Delivery
IRL	*	*	0	5	17.99	1 st Class Recorded
IRL	*	*	0	32	17.99	Parcelforce 24-48
*	*	*	0	10	50	Worldwide

Using this file above here are some scenarios with rates that would be shown:

Input Criteria	Output Rates
English buyer, total item weight of 3	2.99 - 1st Class Recorded 7.99 - ParcelForce 24-48
NI buyer, total item weight of 3	11.99 - 1st Class Recorded 14.99 - ParcelForce 24-48
English buyer, total item weight of 50	80.00 – Special Pallet Delivery
Ireland buyer, total weight of 15	17.99 - 1st Class Recorded 17.99 - ParcelForce 24-48
French buyer, total weight of 3	50.00 – Worldwide
French buyer, total weight of 15	No options would be displayed
English buyer, total weight of 2040	0 - Collection only

9 Column CSV File Format

The CSV file consists of 9 fields:

Field Name	Type	Description
Country	String	ISO3 Country code this rate applies to. Use '*' for all.
Region/State	Decimal	Defined region code this rate applies to. Use '*' for all.
City	String	Defined city. Use '*' for all.
Zip/Postal code from	String	Zipcode search criteria. If using numeric ranges then set this to the number you wish the search to start from. If using pattern matching then set this to the pattern you require. See below for more details on patterns available
Zip/Postal code to	String	Only relevant if you are searching for purely numeric postcode ranges. Please ensure that "Use Zipcode to/from range" is set, otherwise this column is ignored.
Condition from	Real	Starting weight,price or #items at which this shipping rate applies
Condition to	Real	Ending weight,price or #items at which this shipping rate applies
Shipping Price	Real	Price of shipping
Delivery Type	String	Text describing this shipping rate, as shown to the customer in onepage checkout and estimator, e.g. "Via 24-48 Courier"

Example 9 Column CSV file

This example shows usage when “Use Zipcode Range to/From” is set to No:

Country	Region/ State	City	Zip/ Postal Code From	Zip/ Postal Code To	Weight From	Weight To	Shipping Price	Delivery Type
GBR	*		*		0	5	2.99	1 st Class Recorded
GBR	*		*		0	31.99	5.99	Parcelforce 24-48
GBR	*		*		32	1000	80	Special Pallet Delivery
GBR	*	LONDON	*		0	5	7.99	Parcelforce 24-48
GBR	*	LEEDS	*		0	32	9.99	Parcelforce 24-48
GBR	*		*		2000	2100	0	Collection only
GBR	*		BT%		0	5	11.99	1 st Class Recorded
GBR	*		BT%		0	32	14.99	Parcelforce 24-48
GBR	*		PO1 ____		0	5	8.99	Parcelforce 24-48
GBR	*		PO1____		0	32	8.99	Parcelforce 24-48
GBR	*		PO14 ____		0	5	6.99	Parcelforce 24-48
GBR	*		PO14____		0	32	6.99	Parcelforce 24-48
IRL	*		*		0	32	17.99	Parcelforce 24-48
*	*		*		0	10	50	Worldwide

Using this file above here are some scenarios with rates that would be shown:

Input Criteria	Output Rates
GBR buyer, not from London, or with postcode starting BT, PO1, total item weight of 3	2.99 - 1st Class Recorded 5.99 - ParcelForce 24-48
GBR buyer, postcode starts with BT, weight of 3	11.99 - 1st Class Recorded 14.99 - ParcelForce 24-48
GBR buyer, weight 50	80.00 – Special Pallet Delivery
Ireland buyer, weight 15	17.99 – Irish Courier
French buyer, total weight of 3	50.00 – Worldwide
French buyer, total weight of 15	No options would be displayed
English buyer, total weight of 2040	0 - Collection only
GBR buyer, postcode entered as PO1 xxx or PO1xxx, weight 5	8.99 - ParcelForce 24-48
GBR buyer, postcode entered as PO14 xxx or PO14xxx, weight 5	6.99 - ParcelForce 24-48

The following example shows usage when “Use Zipcode Range to/From” is set to Yes:

Country	Region/ State	City	Zip/ Postal Code From	Zip/ Postal Code To	Weight From	Weight To	Shipping Price	Delivery Type
AUS	*		*		0	20	15.00	Main Post
AUS	*	*	9766	9856	0	20	15.99	Main Post
AUS	*	*	9766	9856	0	20	9.50	Aus Courier1
AUS	*	*	9857	9899	0	29	12.20	Aus Courier 2
*	*	*	*	*	0	10	50	Worldwide

Using this file above here are some scenarios with rates that would be shown:

Input Criteria	Output Rates
Aus buyer, zipcode 9770, total item weight of 3	9.50 – Aus Courier1
Aus buyer, zipcode 9878, total item weight of 3	12.50 – Aus Courier1
Aus buyer, zipcode 3000, weight 3	15.00 – Main Post
French buyer, total weight of 3	50.00 – Worldwide

Zip/Post code Pattern Matching

Zipcode pattern matching only applies when “Use Zipcode to/from range” is set to “NO”. This gives a high degree of control over shipping rates where zipcodes/postcodes are of importance (e.g. in the UK).

The pattern matching is done according to the mysql “LIKE” syntax. Here are the options:

Character	Description
%	Matches any number of chars, even zero characters
_ (underscore)	Matches exactly one character
\	Escape char, can be used with % or _ to remove their wildcard status

Examples:

PO1___ would match all postcodes starting with PO1 followed by 3 chars

PO1 _ would match all postcodes starting with PO1 followed by space followed by 3 chars

BT% would match all Northern Island Postcodes

Un-installation

If for any reason you wish to uninstall manually instructions for this can be found here:

<http://www.magentocommerce.com/boards/viewthread/11900/>

Installation Validations

If you wish to validate the install has succeeded updating the database look for the table shipping_matrixrate.

If you are not getting any shipping rates out check the following:

1. Do you have data in shipping_matrixrate which matches your expectations?
2. Is the condition_name set correctly for your requirements before uploading csv (e.g. package_weight for weight filtering)?
3. Do you have correct weights setup if using weight filtering (it's not so intelligent it can tell the difference between an ounce and a pound, you control this!)?
4. Have you enabled the extension!

Deficiencies

1. Does not currently support exporting of csv rates. To observe these rates please use the database directly (see table shipping_matrixrate).
2. The csv import is taken from magento tablerate code and could be improved. In particular if the csv fails to upload sometimes you will not be notified of this. If you are not getting shipping rates out then please check the table shipping_matrixrate to see if data was uploaded. If it was not you have an invalid csv file. The most common issue seen is that strings do not have quotes round them, which can cause issues in upload – I have seen problems when MS Excel is used on Macs to generate the csv file (as discussed by Magento on their tablerates documentation). If in doubt please consult the examples in app/code/community/Webshopapps/examples

This extension has been in circulation since Oct 08 and is highly stable. As ever installing via Magento Connect has it's issues, as most users will have seen with upgrading Magento and using other extensions. It's hard to eradicate all these as the scenarios are so different, but if you email me then I will do all I can to assist you.

Disclaimer

It is highly recommended to backup your server files and database before installing this module. No responsibility can be taken for any adverse effects installation or advice may cause. It is also recommended you install on a test server initially to carry out your own testing.

Release Notes

I do not plan to provide detailed release notes, due to this being a community extension, and the fact I am trying to keep it fairly agile. In general releases are made to provide additional functionality, or to keep the

extension upto date with the latest magento release.

I will not make changes now that affect the csv file format, as this would have too much impact on the current users. If you want additional features then please email and I will quote you for a custom extension.

Version	Changes
2.0.11	Added support for displaying free shipping when promotion setup. Added workaround for Magento bug where subtotal was including virtual and downloadable products incorrectly.
3.0.1	Enhanced Free Shipping functionality: <ul style="list-style-type: none"> • Ability to enable/disable free shipping promotion check • Ability to set free shipping threshold • Ability to display other shipping methods if free shipping threshold or free shipping promotion criteria are met Remove Free Optional Shipping extension – this never really belonged in Matrixrate, and to simplify things I have decided to remove. If you still require this functionality email me.
3.0.6	Further changes to handle virtual/downloadable products. Re-released under webshopapps.com name. Attempt to fix Magento Connect issue by re-issuing release.

Commercial Extensions

I provide a large portfolio of Shipping Extensions, designed to meet the differing needs of the Magento userbase.

The commercial extensions within the table based mechanism include:

1. [Premium Matrixrate](#) – Provides facilities for specifying multiple countries (zones) on one line, filtering simultaneously on price & weight, algorithmic capabilities to reduce csv file size
2. [Customer Rate](#) – Additional capabilities for filtering based on customer group, and calculating shipping price as a percentage of cart total
3. [Product Matrix](#) – The ultimate table based shipping extension, providing massive flexibility around shipping rates, including the use of shipping groups for product filtering (e.g. charge more for large items), customer group filtering, highest price totalling, percentage cart, totalling – this is the extension you want if you really want to control shipping properly.

Also of interest to Matrixrate users are:

1. [Generic Tracker](#) – Allows you to set up your own tracking links. For example if you send via Parcelforce you can enter the tracking number and it will send a url in email to customer so they can track their parcel. Comes with spreadsheet containing URLs for many carriers
2. [Invoicing](#) – Invoicing module giving a simple clean layout with lots of flexibility over display. Will send a pdf to customer with invoice on purchase.

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If you are going to use this extension commercially I would request you make a one-off donation of GBP20 to the creator Karen Baker. In return you get free personalised support & major upgrade notices. As you can probably appreciate I spend quite a bit of time developing, supporting and testing this extension, so I feel this is a reasonable request.

[Click here to Donate via Paypal](#) Any questions then contact via email: sales@webshopapps.com

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