

Shipping Rules for Magento 2



Magento 2 Extension User Guide

Official extension page: [Shipping Rules for Magento 2](#)



User Guide: [Shipping Rules for Magento 2](#)

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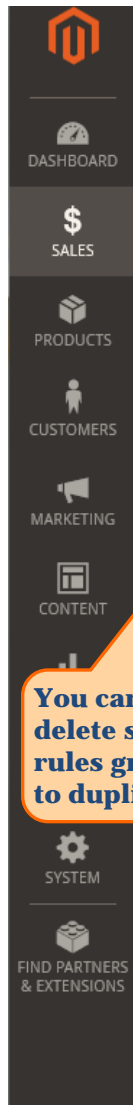
1. Where to create shipping rules

To create shipping rules please go to admin panel -> Sales -> Shipping Rules.

Credit Memos	Priority ↓	Status	Name	Methods	Calculation	Base Rate	Fixed Rate	Percentage	Handling	Action	
Any ▾	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
<input type="checkbox"/>	3	0	Active	Free UPS ground	Ground Ground Residential	Replace	0.00	0.00	0	0	Duplicate
<input type="checkbox"/>	5	0	Inactive	UPS charge for heavy orders	Any	Surcharge	20.00	0.00	0	0	Duplicate
<input type="checkbox"/>	6	0	Active	Flat Rate discount for wholesalers	Any	Discount	0.00	0.00	10	0	Duplicate
<input type="checkbox"/>	4	1	Active	Fitness Equipment flat rate	Any	Replace	45.00	0.00	0	0	Duplicate
<input type="checkbox"/>	2	2	Active	Special: bags	Any	Replace	0.00	3.00	0	0	Duplicate



2. Shipping rules bulk actions



Shipping Rules

To create a new rule please click 'Add Rule' button.

Add Rule

Search [Reset Filter](#)

5 records found

20 per page

1 of 1

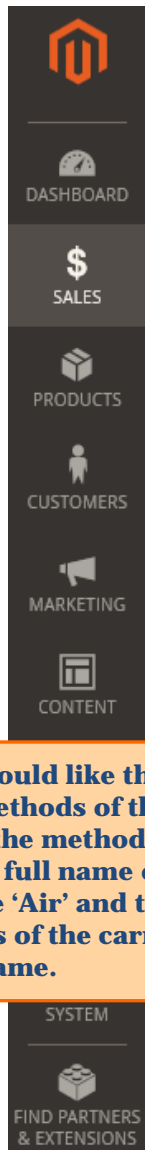
Actions	Priority ↓	Status	Name	Methods	Calculation	Base Rate	Fixed Rate	Percentage	Handling	Action	
<input type="checkbox"/>	3	0	Active	Free UPS ground	Ground Ground Residential	Replace	0.00	0.00	0	0	Duplicate
<input type="checkbox"/>			Inactive	UPS charge for heavy orders	Any	Surcharge	20.00	0.00	0	0	Duplicate
<input type="checkbox"/>			Active	Flat Rate discount for wholesalers	Any	Discount	0.00	0.00	10	0	Duplicate
<input type="checkbox"/>	4	1	Active	Fitness Equipment flat rate	Any	Replace	45.00	0.00	0	0	Duplicate
<input type="checkbox"/>	2	2	Active	Special: bags	Any	Replace	0.00	3.00	0	0	Duplicate

You can enable, disable and delete shipping rules at the rules grid. It is also possible to duplicate rules.



3. Specify shipping carriers and methods

Edit Shipping Rule `Free UPS ground`



SHIPPING RULES OPTIONS

General

Products

Rates

Address Conditions

Stores & Customer Groups

General

Name * Free UPS ground

Status Active

Shipping Carriers

- DHL [dhl]
- Federal Express [fedex]
- Flat Rate [flatrate]
- Best Way [tabletrate]
- Free Shipping [freeshipping]
- United Parcel Service [ups]**
- United States Postal Service [usps]

Shipping Methods

Ground
Ground Residential

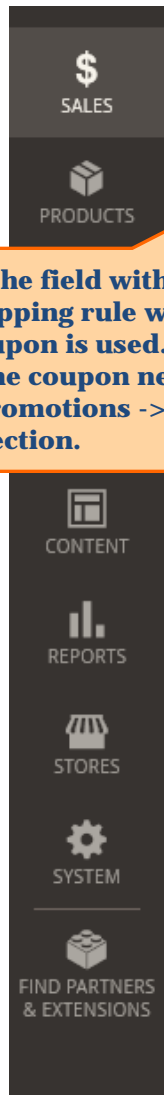
One method name per line, e.g Next Day Air

At the 'General' tab you can select to which shipping carriers the rule should apply.

If you would like the rule to take effect only for some methods of the shipping carrier, please specify the methods here. It is not mandatory to type the full name of the method here. You can just type 'Air' and the rule will apply to all methods of the carrier, which have the word 'air' in the name.



4. Coupon Code condition



If you fill in the field with a coupon code, the shipping rule will apply only when the coupon is used. Please be aware that the coupon needs to be created in Promotions -> Shopping Cart Rules section.

Coupon Code

Apply this rule with coupon only. Create coupon in [Promotions / Shopping Cart Rules](#) area first. Useful when you have ONE coupon only.

Shopping Cart Rule (discount)

Apply this rule with ANY coupon from specified discount rule. Create rule in [Promotions / Shopping Cart Rules](#) area first. Useful when you have MULTIPLE coupons in one rule.

Days of the week

- Sunday
- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday

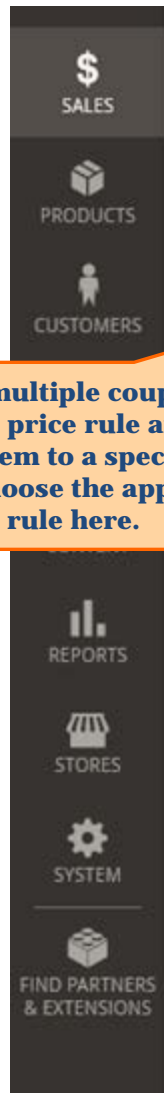
Apply the rules for selected days of week only. Set empty for all days.

Priority

If a product matches several rules, the first rule will be applied only.



5. Shopping cart rule (discount)



If you've got multiple coupons in one shopping cart price rule and want to apply all of them to a specified shipping rule please choose the appropriate shipping cart rule here.

Coupon Code

296780

Apply this rule with coupon only. Create coupon in [Promotions / Shopping Cart Rules](#) area first. Useful when you have ONE coupon only.

Shopping Cart Rule (discount)

Spend \$50 or more - shipping is free!

Apply this rule with ANY coupon from specified discount rule. Create rule in [Promotions / Shopping Cart Rules](#) area first. Useful when you have MULTIPLE coupons in one rule.

Days of the week

Sunday
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday

Apply the rules for selected days of week only. Set empty for all days.

Priority

0

If a product matches several rules, the first rule will be applied only.



6. Shipping rules by days of the week



Coupon Code

296780

Apply this rule with coupon only. Create coupon in [Promotions / Shopping Cart Rules](#) area first. Useful when you have ONE coupon only.

Shopping Cart Rule (discount)

Spend \$50 or more - shipping is free!

Apply this rule with ANY coupon from specified discount rule. Create rule in [PROMOTIONS / Shopping Cart Rules](#) area first. Useful when you have MULTIPLE coupons in one rule.

Days of the week

Sunday
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday

Apply the rules for selected days of week only. Set empty for all days.

Priority

0

If a product matches several rules, the first rule will be applied only.

Specify particular days of the week to apply the rule on these days only.

You can specify the rule priority. When a product matches several shipping rules, only the rule with the highest priority is applied to the product. Zero (0) is the highest priority.



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7. Set rule priority

Coupon Code 296780
Apply this rule with coupon only. Create coupon in [Promotions / Shopping Cart Rules](#) area first. Useful when you have ONE coupon only.

Shopping Cart Rule (discount) Spend \$50 or more - shipping is free!
Apply this rule with ANY coupon from specified discount rule. Create rule in [Promotions / Shopping Cart Rules](#) area first. Useful when you have MULTIPLE coupons in one rule.

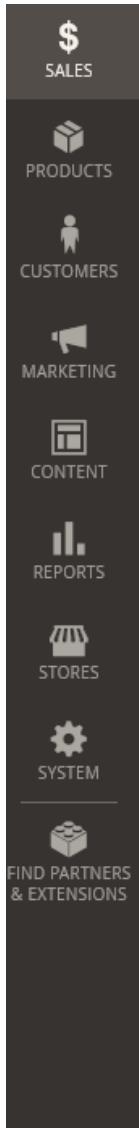
Days of the week
Sunday
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday
Apply the rules for selected days of week only. Set empty for all days.

Priority 0
If a product matches several rules, the first rule will be applied only.

You can specify the rule priority. When a product matches several shipping rules, only the rule with the highest priority is applied to the product. Zero (0) is the highest priority.



8. Conditions based on product attributes



SHIPPING RULES OPTIONS

General

Products ✎

Rates

Address Conditions

Stores & Customer Groups

Select products or leave blank for all products.

If **ALL** of these conditions are **TRUE** :

Quantity in cart equals or greater than 2 ✖

Category is Gear ✖

Please choose a condition to add. ▲

Please choose a condition to add. ▲

Conditions Combination

Cart Item Attribute

- Price in cart
- Quantity in cart
- Row total in cart

Product Attribute

- Activity
- Attribute Set
- Category
- Category Gear
- Climate
- Collar
- Color
- Eco Collection
- Erin Recommends
- Features
- Format
- Gender
- Material

At the 'Products' tab you can specify to which products the rule should apply with the help of conditions based on product attributes. You can use category, brand, SKU and any other product attributes for conditions. Leave blank if the rule should apply to all products.

Qty From



9. Free shipping setting

- DASHBOARD
- SALES
- PRODUCTS
- CUSTOMERS
- MARKETING
- CONTENT
- FIND PARTNERS & EXTENSIONS

SHIPPING RULES OPTIONS

- General
- Products**
- Rates
- Address Conditions
- Stores & Customer Groups

Select products or leave blank for all products.

If ALL of these conditions are TRUE :

Quantity in cart equals or greater than 2

Category is Gear



Free Shipping

Ignore Free Shipping Promo

If the option is set to 'No', totals below will be applied only to items with non-free shipping.

You may have shopping cart price rules, which give free shipping for certain products. Set this option to 'Yes' if you would like this rule to ignore the 'free shipping' discounts. If the option is set to 'No', the rule will be applied only to products with non-free shipping.

Totals for selected products, excluding items shipped for free.

Weight From	<input type="text" value="0.0000"/>
Weight To	<input type="text" value="0.0000"/>
Qty From	<input type="text" value="0"/>
Qty To	<input type="text" value="0"/>



Ignore Free Shipping Promo

No



If the option is set to `No`, totals below will be applied only to items with non-free shipping.

Totals for selected products, excluding items shipped for free.

Weight From

5

Weight To

50

Qty From

10

Qty To

0

Price From

150

Original product cart price, without discounts.

Price To

7000

Original product cart price, without discounts.

You can specify additional product parameters, which should be met for the rule to apply. In this case the rule will apply to orders, in which the matching products weigh between 5 and 50, there are at least 10 matching products in the order, total price of the matching products is between 150 and 7000. You can leave 'from' or 'to' fields blank not to set lower or upper limitation.



11. Specify rates for shipping price update

Rates

Calculation	<input type="text" value="Replace"/>
Base Rate for the Order	<input type="text" value="5.00"/>
Fixed Rate per Product	<input type="text" value="3.00"/>
Rate per unit of weight	<input type="text" value="1.50"/> <small>Enter the surcharge or discount amount that'll be automatically multiplied by the product's weight to create a shipping rate.</small>
Percentage per Product	<input type="text" value="1"/> <small>Percentage of original product cart price is taken, without discounts.</small>
Handling Percentage	<input type="text" value="10"/> <small>The percentage will be added or deducted from the shipping rate. If it is 10% and UPS Ground is \$25, the total shipping cost will be \$27.5</small>
Minimal rate change	<input type="text" value="1.00"/> <small>This is the minimal amount, which will be added or deducted by this rule.</small>
Maximal rate change	<input type="text" value="100.00"/> <small>This is the maximum amount, which will be added or deducted by this rule.</small>
Minimal rate	<input type="text" value="30.00"/> <small>Minimal total rate after the rule is applied.</small>
Maximal total rate	<input type="text" value="200.00"/> <small>Maximal total rate after the rule is applied.</small>

At the 'Rates' tab you can select the rate modification action – surcharge, discount or replace. And specify the modification rates.

Fixed rate will be applied to the shipping price once per each matching product. In this case if there 10 matching products, the discount will be equal to 30.


IMPORTANT. All rates are specified in base currency. If you have several currencies at your store, the rates will be converted from base currency to other currencies according to the conversion rates.




11. Specify rates for shipping price update

SHIPPING RULES OPTIONS

General

Products 

Rates 

Address Conditions

Stores & Customer Groups

Rates

Calculation

Replace 

Base Rate for the Order

0.00

Fixed Rate per Product

3.00

Rate per unit of weight

1.50

Enter the surcharge or discount amount that'll be automatically multiplied by the product's weight to create a shipping rate.

Percentage per Product

0

Percentage of original product cart price is taken, without discounts.

Handling Percentage

0

The percentage will be added or deducted from the shipping rate. If it is 10% and UPS Ground is \$25, the total shipping cost will be \$27.5

Minimal rate change

0.00

This is the minimal amount, which will be added or deducted by this rule.


Base rate will be applied to the shipping price only once per order.




11. Specify rates for shipping price update

Rates

General

Products 


Rates 

Address Conditions

Percentage rate is based on the product price in cart, without discounts. In this example, it's one percent of the price of all matching products. If the matching products cost 500, the shipping discount will be 5 – one percent of 500.

IMPORTANT. Based, Fixed and Percentage rates are added up to each other. So with this rule shipping will be discounted:


- One time by 5 for all matching items
- Plus discount of 3 for each matching product
- Plus discount equal to one percent of the price of all matching products.


Calculation	Discount 
Base Rate for the Order	<input type="text" value="5.00"/>
Fixed Rate per Product	<input type="text" value="3.00"/>
Rate per unit of weight	<input type="text" value="1.50"/> <small>Enter the surcharge or discount amount that'll be automatically multiplied by the product's weight to create a shipping rate.</small>
Percentage per Product	<input type="text" value="1"/> <small>Percentage of original product cart price is taken, without discounts.</small>
Handling Percentage	<input type="text" value="10"/> <small>The percentage will be added or deducted from the shipping rate. If it is 10% and UPS Ground is \$25, the total shipping cost will be \$27.5</small>
Minimal rate change	<input type="text" value="1.00"/> <small>This is the minimal amount, which will be added or deducted by this rule.</small>
Maximal rate change	<input type="text" value="100.00"/> <small>This is the maximum amount, which will be added or deducted by this rule.</small>
Minimal rate	<input type="text" value="30.00"/> <small>Minimal total rate after the rule is applied.</small>
Maximal total rate	<input type="text" value="200.00"/> <small>Maximal total rate after the rule is applied.</small>



12. Surcharge or discount shipping total

General


Products 

Rates 

Address Conditions

Stores & Customer Groups

Rates

Calculation	Discount 
Base Rate for the Order	<input type="text" value="5.00"/>
Fixed Rate per Product	<input type="text" value="3.00"/>
Rate per unit of weight	<input type="text" value="1.50"/> <small>Enter the surcharge or discount amount that'll be automatically multiplied by the product's weight to create a shipping rate.</small>
Percentage per Product	<input type="text" value="1"/> <small>Percentage of original product cart price is taken, without discounts.</small>
Handling Percentage	<input type="text" value="10"/> <small>The percentage will be added or deducted from the shipping rate. If it is 10% and UPS Ground is \$25, the total shipping cost will be \$27.5</small>
Minimal rate change	<input type="text" value="1.00"/> <small>This is the minimal amount, which will be added or deducted by this rule.</small>
Maximal rate change	<input type="text" value="100.00"/> <small>This is the maximum amount, which will be added or deducted by this rule.</small>
Minimal rate	<input type="text" value="30.00"/> <small>Minimal total rate after the rule is applied.</small>
Maximal total rate	<input type="text" value="200.00"/> <small>Maximal total rate after the rule is applied.</small>


Handling Percentage will add or deduct the total shipping rate depending on the Calculation method you choose. Replace calculation doesn't influence on handling percentage.


E.g. Shipping costs \$30 and 'Discount' calculation is chosen. In this particular case handling percentage is 10. So the shipping cost will become \$27 (\$30 minus 10 percent).



13. Min and max rates for shipping price update

General

Products 

Rates 

Address Conditions

Stores & Customer Groups

Rates

Calculation

Base Rate for the Order

Fixed Rate per Product

Rate per unit of weight
Enter the surcharge or discount amount that'll be automatically multiplied by the product's weight to create a shipping rate.

Percentage per Product
Percentage of original product cart price is taken, without discounts.

Handling Percentage
The percentage will be added or deducted from the shipping rate. If it is 10% and UPS Ground is \$25, the total shipping cost will be \$27.5

Minimal rate change
This is the minimal amount, which will be added or deducted by this rule.

Maximal rate change
This is the maximum amount, which will be added or deducted by this rule.

Minimal rate
Minimal total rate after the rule is applied.

Maximal total rate
Maximal total rate after the rule is applied.

Maximal total rate change is the maximal amount which can be added to or deducted from the shipping price of the order by this rule. Let's say the discount calculated for shipping of matching products is 150. If you specify 100 in this field, the maximum shipping discount for matching products will be 100.

Minimal total rate change is the minimal amount which can be added to or deducted from the shipping price.



14. Min and max rates for shipping price

- General
- Products
- Rates**
- Address Conditions
- Stores & Customer Groups

Rates


Calculation	Discount
Base Rate for the Order	<input type="text" value="5.00"/>
Fixed Rate per Product	<input type="text" value="3.00"/>
Rate per unit of weight	<input type="text" value="1.50"/> <small>Enter the surcharge or discount amount that'll be automatically multiplied by the product's weight to create a shipping rate.</small>
Percentage per Product	<input type="text" value="1"/> <small>Percentage of original product cart price is taken, without discounts.</small>
Handling Percentage	<input type="text" value="10"/> <small>The percentage will be added or deducted from the shipping rate. If it is 10% and UPS Ground is \$25, the total shipping cost will be \$27.5</small>
Minimal rate change	<input type="text" value="1.00"/> <small>This is the minimal amount, which will be added or deducted by this rule.</small>
Maximal rate change	<input type="text" value="100.00"/> <small>This is the maximum amount, which will be added or deducted by this rule.</small>
Minimal rate	<input type="text" value="30.00"/> <small>Minimal total rate after the rule is applied.</small>
Maximal total rate	<input type="text" value="200.00"/> <small>Maximal total rate after the rule is applied.</small>

Minimal rate is minimal amount shipping rate could be.

Maximal total rate is maximum amount shipping rate could be. If the rate is counted according to conditions as \$220 but maximal total rate is \$200, it will be counted as \$200, not \$220. It will never be larger than \$200.



15. Conditions based on order and shipping data


SALES


[← Back](#) [Delete](#) [Reset](#) [Save and Continue Edit](#) Save

SHIPPING RULES OPTIONS

General

Products

Rates

Address Conditions


Stores & Customer Groups

Apply the rule only if the following conditions are met (leave blank for all products).

If **ALL** of these conditions are TRUE :

- Subtotal **equals or greater than** 500 ✖
- Total Weight **equals or less than** 100 ✖
- Shipping Country **is** United States ✖


Please choose a condition to add. ▲

Please choose a condition to add.

- Products subselection
- Conditions combination
- Cart Attribute**
- Subtotal
- Subtotal with discount
- Total Items Quantity
- Total Weight
- Shipping Postcode
- Shipping State/Province
- Shipping Country
- Shipping City
- Shipping Address Line

At the 'Address Conditions' tab you can specify conditions based on order data, such as subtotal, subtotal with discount, items quantity and total weight. And shipping address information, such as zip code, state/province, city and country.

IMPORTANT. These conditions are checked against all items in the order, not only products matching conditions from 'Products' tab.

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16. Conditions based on specific products in the order

SHIPPING RULES OPTIONS

- General
- Products
- Rates
- Address Conditions**
- Stores & Customer Groups

Apply the rule only if the following conditions are met (leave blank for all products).

If ALL of these conditions are TRUE :

If total quantity equals or greater than 500 for a subselection of items in cart matching

ALL of these conditions:

Please choose a condition to add.

Product Attribute

- Activity
- Attribute Set
- Category**
- Category Gear
- Climate
- Collar
- Color
- Eco Collection
- Erin Recommends
- Features
- Format
- Gender
- Material
- New
- Pattern
- Performance Fabric
- SKU
- Sale

At the 'Address Conditions' tab you can specify conditions based on specific products. If there are specific products in the order you can increase, decrease or determine shipping rate not only for particular product but for the whole order.

IMPORTANT. These conditions are checked against specific items in the order. Let's say you specify manufacturer 'Apple' at this tab. If there's a product of the manufacturer in the cart, the shipping rule will apply to the whole order.




17. Conditions “starts from” and “ends with”

SHIPPING RULES OPTIONS

General

Products


Rates


Address Conditions 

Stores & Customer Groups

Apply the rule only if the following conditions are met (leave blank for all products).

If ALL of these conditions are TRUE :

Shipping Postcode starts from 874 

Shipping Postcode ends with 901 



New condition types “starts from” and “ends with”. It can be especially useful for zip codes. You can point starting and last numbers or letters of zip code. The rule will apply to all codes starting from “numbers or letters you type” or ending with “numbers or letters you type”.




18. Choose store view and customer group


SHIPPING RULES OPTIONS

General

Products

Rates

Address Conditions 

Stores & Customer Groups 

At the 'Stores & Customer Groups' tab you can select on which store views and to which customer groups the rule should apply.

Apply In

Stores

Main Website
Main Website Store
Default Store View

Leave empty or select all to apply the rule to any

Apply For

Customer Groups

NOT LOGGED IN
General
Wholesale
Retailer

Leave empty or select all to apply the rule to any group



19. Summary of the sample shipping rule

So we've created a shipping rule, which apply only on Default store view and only for customers, who are members of Wholesalers group.

The rule will give one discount of '5' for the whole order plus discount of '3' for each matching product plus discount of one percent of the price of all matching items.



20. Example of shipping rule application

Street Address *

201 Tallapoosa Street

City *

Montgomery

State/Province *

Alabama

Zip/Postal Code *

36104

Country *

United States

Phone Number *

+1 334 281 5040

Shipping Methods

- \$0.00 Table Rate Best Way
- \$45.00 Fixed Flat Rate

In this example shipping price is set to zero with the help of 'Replace' action.



21. Shipping rules for bundled products

Please be aware that for shipping rules a bundled product is a set of products and each component of a bundled product is treated like a separate product. So discounts and surcharges are applied separately to each component.

For example, you have a rule, which applies surcharge of 5 to each product. If you add a bundled product, consisting of 5 components to cart, the surcharge will be 25.



Thank you!

Should you have any questions or feature suggestions, please contact us at:

<http://amasty.com/contacts/>

Your feedback is absolutely welcome!



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