amasty

For more details see the Shipping Rules for Magento 2 extension page.

Guide for Shipping Rules for Magento 2

Achieve your goals by managing shipping conditions according to your demands.

- Create shipping rules depending on purchases history, cart or customer attributes
- Apply individual rules to specified shipping methods and shipping carriers
- Define a selection of shipping carriers, available to your customers, and manage their shipping rates
- Change the rate for the whole cart both by fixed amount and by percent
- Choose specific days or periods of the rules validity

General extension settings

Extension settings are located at **Stores > Configuration > Amasty Extensions > Shipping Rules**

Include tax in subtotal - indicate whether the subtotal includes taxes.

Use subtotal after discount - set to **Yes**, if the subtotal should contain prices after the discount; set to **No**, if the subtotal should contain only original prices.

Effectively deal with all stages of RMA process to organize the efficient process of returning products.

Shipping rule settings

Shipping Rules are set up in **Sales → Shipping Rules**.

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Shipping Rules

Add Rule

▼ Filters   👁 Default View ▾   ⚙ Columns ▾

| Actions ▲ | | 6 records found | | | | | 20 ▾ per page | | | ‹ | 1 | of 1 | › |

Delete
Change Status

	ity	Priority	Status	Name	Carriers	Methods	Customer Groups	Calculation	Store Views	Action
☐	1	4	Inactive	10% discount per product for wholesales	Flat Rate [flatrate]	Any	Wholesale	Discount	All Store Views	Select ▾
										Edit
										Duplicate
☐	2	2	Inactive	Shipping Cost per weight: +$1 per 1kg if Total Weight is more than 4kg	Flat Rate [flatrate] Best Way [tablerate]	Any	All Customer Groups	Surcharge	All Store Views	
☐	3	1	Active	Surcharge $50 for distant regions	DHL [dhl] Federal Express [fedex] Flat Rate [flatrate] Best Way [tablerate] Free Shipping [freeshipping] United Parcel Service [ups] United States Postal Service [usps]	Any	NOT LOGGED IN General Wholesale Retailer	Replace	Main Website Main Website Store Default Store View	Select ▾
☐	4	3	Active	20% off for shipping if the subtotal is >$50	Flat Rate [flatrate] Best Way [tablerate]	Any	All Customer Groups	Discount	All Store Views	Select ▾

All rules are displayed on a handy grid. You can see the **ID** of the rules, their **Priority**, **Status**, **Name**, shipping **Carriers** and **Methods**, **Customers Groups**, type of **Calculation** and **Store Views** in one place.

Easily manage all the created shipping rules right on the grid. *Edit* them or *Duplicate* in the **Action** column.

To commit mass actions, tick the rules and choose the action from the **Actions** dropdown menu. You can **Delete** the rules or **Change Status** to *Activate / Inactivate*.

To create a new rule, click the **Add Rule** button.

Shipping Methods

The extension allows to set an unlimited number of various rules according to shipping carriers,

countries, specific products, schedule, particular conditions, etc.

Rule Name - specify the name of the shipping rule, which will be used in the admin area. Rule Name is also displayed on the grid.

Rule Status - define the rule as active or inactive.

Shipping Carriers and Methods - choose shipping carriers to which the rule should be applied and determine the list of available shipping methods.

The module allows to choose particular shipping methods without choosing the whole carrier.

Rule Priority - define the importance of the rule. The higher the rule priority is, the earlier the rule will be applied in comparison with others.

Keep in mind, that when two or more rules are applied to a shipping rate of a product simultaneously, the customers will see the rate, provided by the rule with the lowest priority. Check this block to get more information.

Products

This option is unavailable for the *Replace* calculation type, since in this type shipping rates are replaced for the whole cart, regardless of the products in it.

Ignore Free Shipping Promo - set to *Yes*, if you want the rule to be applied to all products, including free shipping promo items; set to *No*, if the rule should be applied only for items with non-free shipping.

Rates

In this tab you can set the necessary rates.

Rates

Calculation

Replace	▲
Replace	
Surcharge	
Discount	
Partial Replace	

Base Rate for the Order

50.00

Specify the total rate per order. Learn more from the user guide.

Fixed Rate per Product

0.00

Specify a fixed rate for each product in the cart. The rate for the whole order will be formed by multiplying the mentioned fixed rate by the number of products in the cart. Learn more from the user guide.

Calculation - set to:

- **Replace** - if you want the original shipping rate for the whole cart to be changed to another value;
- **Surcharge** - to add the calculated value to the present shipping rate;
- **Discount** - if you want to deduct the calculated value from the present shipping rate;
- **Partial Replace** - if you want the original shipping rate to be changed to another value by additional product conditions (mixed cart).

How does it work?

If you want to apply particular shipping cost for specific products, select **Partially Replace** type and set the necessary product conditions according to which this calculation type will be applied. Thus, shipping cost for the specified products in a mixed cart will be calculated differently and the total sum for shipping will be recounted.

Base Rate for the Order - determine the total rate per order.

Fixed Rate per Product - specify a fixed rate for each product in the cart. The rate for the whole order will be formed by multiplying the mentioned fixed rate by the number of products in the cart.

Rate per unit of weight	0.00

Enter the surcharge or discount amount that will be automatically multiplied by the products' weight to calculate a shipping rate. Learn more from the user guide.

Percentage per Product	0.00

Determine the rate as a percentage of the original cost of products in the cart (the costs are taken without any discounts that might have been applied). Learn more from the user guide.

Handling Percentage	0.00

Specify the percentage that will be automatically added or deducted from the shipping rate. The percentage will be calculated on the original shipping rates basis. If it is 10% and UPS Ground is $25, the total shipping cost will be $27.5. Learn more from the user guide.

Rate Change	min. 0.00	max. 0.00

Set boundary (minimal or maximal) values, for which the original rate can be changed. Learn more from the user guide.

Total Rate	min. 0.00	max. 0.00

Determine boundary (minimal or maximal) values of a shipping rate which can be set after the rule application. Learn more from the user guide.

Rate per unit of weight - define a rate that will be automatically multiplied by the products' weight to create a shipping rate. For example, if you set $5 rate per unit of weight (regarding that a unit of weight equals to 1 kilo), then the rate for the order, containing 5 kilos of products of the mentioned category (without products of other categories), will constitute $25.

Percentage per Product - determine the rate as a percentage of the original cost of products in the cart (the costs are taken without any discounts that might have been applied).

Handling Percentage - specify the percentage that will be automatically added or deducted from the shipping rate. The percentage will be calculated on the original shipping rates basis.

Minimal\Maximal Rate Change - set boundary (minimal or maximal) values, for which the original rate can be changed.

Minimal\Maximal Total Rate - determine boundary (minimal or maximal) values of a shipping rate which can be set after the rule application.

Conditions

Specify the conditions according to which the rule will be applied.

Conditions

Apply the rule only if the following conditions are met (leave blank for all products).
If **ALL** of these conditions are **TRUE** :

Shipping Areas **is** : **Distant regions (US)** ⊗

⊕

Check our user guide to set the conditions properly. Also, this post in our blog will help you to avoid common mistakes.

Backorders

Apply the rule to | All orders ▲ | ❓

| All orders |
| Backorders only |
| Non backorders |

Condition tree - if there are some conditions specified, the rule will be applied only when the conditions are met. If there are no conditions set, the rule will be applicable all the time.

The conditions may include **Products Subselection**, **Conditions Combination**, **Cart Attributes**, **Advanced Conditions**, **Customer Attributes** and **Shipping Areas**. Thus, in this option you can allow shipping according to the product level and category, various customer attributes, custom groups, shipping areas, etc.

In case you want to set several independent conditions and you need any of them for the rule to be applied, change 'All' value to 'Any' in the dropdown menu.

Conditions

Apply the rule only if the following conditions are met (leave blank for all products).
If | ALL ▲ | of these conditions are **TRUE** :

| ALL |
| ANY |

Check our user guide to set the conditions properly. Also, this post in our blog will help you to avoid common mistakes.

To avoid common mistakes while setting the conditions, check this post.

Backorders - the option determines how the rule will work if there are Backorder items in the cart.

- **Backorders only** - the rule is applied when there are only Backorder items in the cart.
- **Non backorders** - the rule works when there are no Backorder items in the cart.
- **All orders** - the rule works regardless of whether there are Backorder items in the cart or not.

Stores & Customer Groups

In this tab you can configure rules application for different store views and customer groups.

Stores & Customer Groups

Admin Area   Off

Enable or disable the rule in the admin area. Learn more from the user guide.

Stores

All Store Views
Main Website
Main Website Store
Default Store View

Specify the stores where the rule will be applied. Leave empty or select all to apply the rule to any store. Learn more from the user guide.

Customer Groups

NOT LOGGED IN
General
Wholesale
Retailer

Specify customer groups to which the rule should be applied. Leave empty or select all to apply the rule to any group. Learn more from the user guide.

Admin Area - enable or disable the rule application in the admin area.

Stores - specify the stores where the rule should be applied.

Customer Groups - define customer groups, to which the rule should be applied.

Please note that if nothing is specified in **Stores** and **Customer Groups conditions**, the rule will be applied to all stores and customer groups accordingly.

Days & Time

Expand this tab to choose particular days of the week and time for the rule to be applied.

Days and Time ✏

Days of the Week - choose separate days of the week if you don't want the rule to be applied the entire time.

Time From - Time To - determine the specific validity period of the rule.

Coupons

Use this tab to limit certain customer's facilities and to disable or allow shipping with coupon.

Coupons and discounts ✏

Apply Rules Only With

Apply Rules Only With

Coupon Code - when a coupon is provided here, the rule will be activated only when this coupon is entered.

Shopping Cart Rule (discount) - works the same as the setting above, but uses the list of coupons in the selected rules instead of a single coupon.

Do NOT Apply Rules With

Coupon Code - when a coupon is provided here, the rule won't work when this coupon is entered.

Shopping Cart Rule (discount) - works the same as the setting above, but uses the list of coupons in the selected rules instead of a single coupon.

To make these options available, you need to create a coupon at your backend settings in **Marketing / Cart Price Rules** area first.

Shipping Areas

The module allows to arrange shipping destinations into areas and apply rules to the whole area at once. Include or exclude from the area different countries, states, regions, cities, zip codes, etc. For example, you can easily configure delivery to the distant regions by creating the appropriate shipping area that includes such destinations.

Go to **Stores → Sales → Shipping Areas**.

Shipping Areas

👤 demouser ▾

Add Shipping Area

🔽 Filters   👁 Default View ▾   ⚙ Columns ▾

| Actions ▲ | 4 records found | | 20 ▾ per page | ‹ | 1 | of 1 | › |

Delete

Duplicate

Change
Status

▾	ID	Name	Description	Status	Action
☐	1	Distant Regions	Use if it is needed to block delivery to distant regions.	Active	Select ▾
☐	2	US Central	Central US regions.	Active	Select ▾
☐	3	Canada	Main Canada regions.	Active	Select ▾
☐	4	Canada East Coast	East Canada regions.	Active	Select ▲

Edit

Delete

Create and easily manage all shipping areas on a handy grid, where you can see the **Name**, **Description** and **Status** of each area.

Edit or *Delete* a rule via **Select** dropdown menu in the **Action** column.

To perform mass actions, tick the rules and choose the necessary variant from the **Actions** dropdown. *Delete*, *Duplicate* or *Change Status* in one click.

To create a new area, hit the **Add Shipping Area** button.

Go to the **General** tab. In our example we create a custom area for distant UK regions.

General

Shipping Area Name *	Distant Regions
Status	⬤ Active
Description	Use if it is needed to block delivery to distant regions.

Shipping Area Name - specify the title of the area. It will be displayed on the grid and in the rules conditions.

Status - set to *Active* to enable the area.

Description - define additional information about the area: the cases of usage, regions included, etc. The description will be displayed on the grid as well.

Then specify the particular regions in the **Area Conditions** tab.

Area Conditions ✎

For Countries	Include ▾
Countries *	United Kingdom ✕ ▾
For States/Regions	Include ▾
States/Regions *	West Midlands North West
	Enter line separated.
For Cities	Exclude ▾
Cities *	Warrington Carlisle
	Enter line separated.

For Countries - choose *All* countries or *Include/Exclude* specific countries.

Countries - specify the countries you want to include in the area or exclude from. Use a handy dropdown menu and tick the countries needed.

For States/Regions - define all the states and regions or the areas to be included/excluded.

States/Regions - specify the states or regions and include in the area or exclude from.

For Cities - select *All* to add all cities to the area or *Include/Exclude* particular ones.

Cities - specify the particular cities.

For Zip/Postcode	Include ▾

Zip/Postcode *	WN4	Zip To (leave empty to use s	🗑
	WN6	WN8	🗑

Add Zip   Switch to textarea input (for mass insert)

For Shipping Address Line	Doesn't contain ▾

Shipping Address Line *   Wentworth Road

Enter line separated.

For Zip/Postcode - just as in the previous option, *Include* or *Exclude* necessary Zip/Postcodes if needed. For example, you can specify a zip code that starts from 'X' or ends with 'Y. Use a single postcode or a number of zip codes From - To.

For Shipping Address Line - choose *All* shipping address lines or specify the particular lines if *Contains* or *Doesn't contain* is selected.

In our example we've created a shipping area that contains particular regions, but excluded several cities. We also included one single zip code and a range of zip codes, but excluded a specific address line out of the area.

Save the area.

Now you can easily add the necessary areas to your rule conditions and configure shipping to these areas in one click.

Conditions

Apply the rule only if the following conditions are met (leave blank for all products).
If **ALL** of these conditions are **TRUE** :

Shipping Areas **is** : **Distant Regions** ⊗

Shipping Areas **is** : | US Central | ▲ | ⊗

Distant Regions
US Central
Canada
Canada East Coast

Magento 2 Shipping Rules is compatible with **Multi Address Checkout.** Thus you can enable your customers to ship an order to multiple addresses during checkout, and determine the maximum number of addresses to which an order can be shipped.

Usage example

Example #1

We are going to create a rule, according to which free shipping is allowed only when the total weight is equal or below 4 kg. In case the total weight is more than the limit, +1$ for each kg is added.

So we specify rule name, carriers, methods, priority and activate it.

Shipping Methods ✎

Rule Name *	Shipping Cost per weight: +$1 per 1kg if Total Weight is more th
Rule Status	⬤ Active
Shipping Carriers and Methods	Flat Rate ✕ Best Way ✕ ▼

Select Shipping Carriers and Methods to which the rule will be applied. When the shipping carrier is selected all its shipping methods will be also captured. Learn more from the user guide.

Rule Priority	2

Define the importance of the rule. The higher the rule priority is, the earlier the rule will be applied in comparison with other rules. Learn more from the user guide.

Then we need to expand **Rates** tab and choose *Surcharge* in the **Calculation** option so that to add extra sum.

Rates

Calculation	Surcharge ▼ ❓

Set the necessary rate per unit.

Rate per unit of weight	1.00

Enter the surcharge or discount amount that will be automatically multiplied by the products' weight to calculate a shipping rate. Learn more from the user guide.

In the **Conditions** tab we specify the particular total weight that is needed for the rule to be applied.

Conditions

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

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

Total Weight greater than 4 ⊗

⊕

Check our user guide to set the conditions properly. Also, this post in our blog will help you to avoid common mistakes.

Backorders

Apply the rule to   All orders   ▼   ❓

Example #2

In this case the rule will provide wholesale customer group with a 10% discount per each product.

We configure the general setting of the rule.

Shipping Methods ✎

Rule Name *   10% discount per product for wholesales

Rule Status   ⬤ Active

Shipping Carriers and Methods   Flat Rate ×   ▼

Select Shipping Carriers and Methods to which the rule will be applied. When the shipping carrier is selected all its shipping methods will be also captured. Learn more from the user guide.

Rule Priority   4

Define the importance of the rule. The higher the rule priority is, the earlier the rule will be applied in comparison with other rules. Learn more from the user guide.

In the **Rates** tab we need to specify **Percentage per Product**. It is also possible to set maximum value for which the original rate can be changed.

Percentage per Product   10.00

Determine the rate as a percentage of the original cost of products in the cart (the costs are taken without any discounts that might have been applied). Learn more from the user guide.

Rate Change   min. 0.00

max. 60.00

Set boundary (minimal or maximal) values, for which the original rate can be changed. Learn more from the user guide.

And finally we select a particular customer group to which the rule should be applied.

Stores & Customer Groups

Admin Area   Off

Stores

All Store Views
Main Website
Main Website Store
Default Store View

Customer Groups

NOT LOGGED IN
General
Wholesale
Retailer

Thus, combining all the options and conditions, we can create all necessary rules to achieve our

business goals.

Troubleshooting checklist

Please review the information below to figure out why the rule you've set up doesn't work or works incorrectly.

Check if conditions are specified correctly

One of the most common reasons, that shipping rules either don't work properly or don't work at all, is incorrectly set conditions.

The problem may arise because Magento will search for a product with the specified single SKU (in our example the SKU is "23rf,29rt,300ds") in the cart, not any of the products with the SKUs from the list: 23rf, 29rt or 300ds. If you've meant the second requirement (one of the products from the list), you should configure the rule in the way presented below.

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

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

If **total quantity** **equals or greater than** **1** for a subselection of items in cart matching **ALL** of these conditions: ⊗

SKU **is one of** **23rf,29rt,300ds** ⊗

⊕

⊕

Backorders

Apply the rule to   [All orders ▼]

Consider the difference: conditions specified on the Products tab and on Conditions tab

- **Conditions** tab defines the cases when the rule should be used.

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

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

If **total quantity** **equals or greater than** **3** for a subselection of items in cart matching **ALL** of these conditions: ⊗

SKU **is one of** **23rf,29rt,300ds** ⊗

⊕

⊕

Backorders

Apply the rule to   [All orders ▼]

- **Products** tab specifies the products to which the rules should be applied.

Products

Apply the rule only if the following conditions are met (leave blank for all products).
If **ALL** of these conditions are **TRUE** :

  SKU **is one of** 23rf,29rt,300ds ⊗

  ⊕

Now let's check how the rule presented above works: when the cart contains 3 or more products with SKUs 23rf, 29rt or 300ds, the shipping rates will be replaced with $0 only for products with the mentioned SKUs. Shipping rates of products with other SKUs in the cart won't be changed when the rule activates.

Check if there are no other activated rules that are not needed

To avoid undesirable results, make sure there are no active rules that shouldn't be applied. Let's check the situation: you have several shipping rules and all of them are set as active. Rule 1 has the highest priority, Rule 2 has lower priority and Rule 3 has the lowest one. That's how it will work when the cart contents meet all active shipping rules conditions:

- Rule 1 will be applied first. It is set to replace a shipping rate of any one item in the cart with $0.50.
- Rule 2 will be applied the second. It replaces the cost of shipping for the whole order with $15.
- Rule 3 will be applied the last. This rule sets free shipping for all items in the cart. This means, that shipping rate for the whole order will constitute $0.

Use **Conditions** tab to restrict the cases of the rule application.

Find out how to install the Shipping Rules for Magento 2 via Composer.
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