

# Matrix Rates for Magento 2

## User Guide



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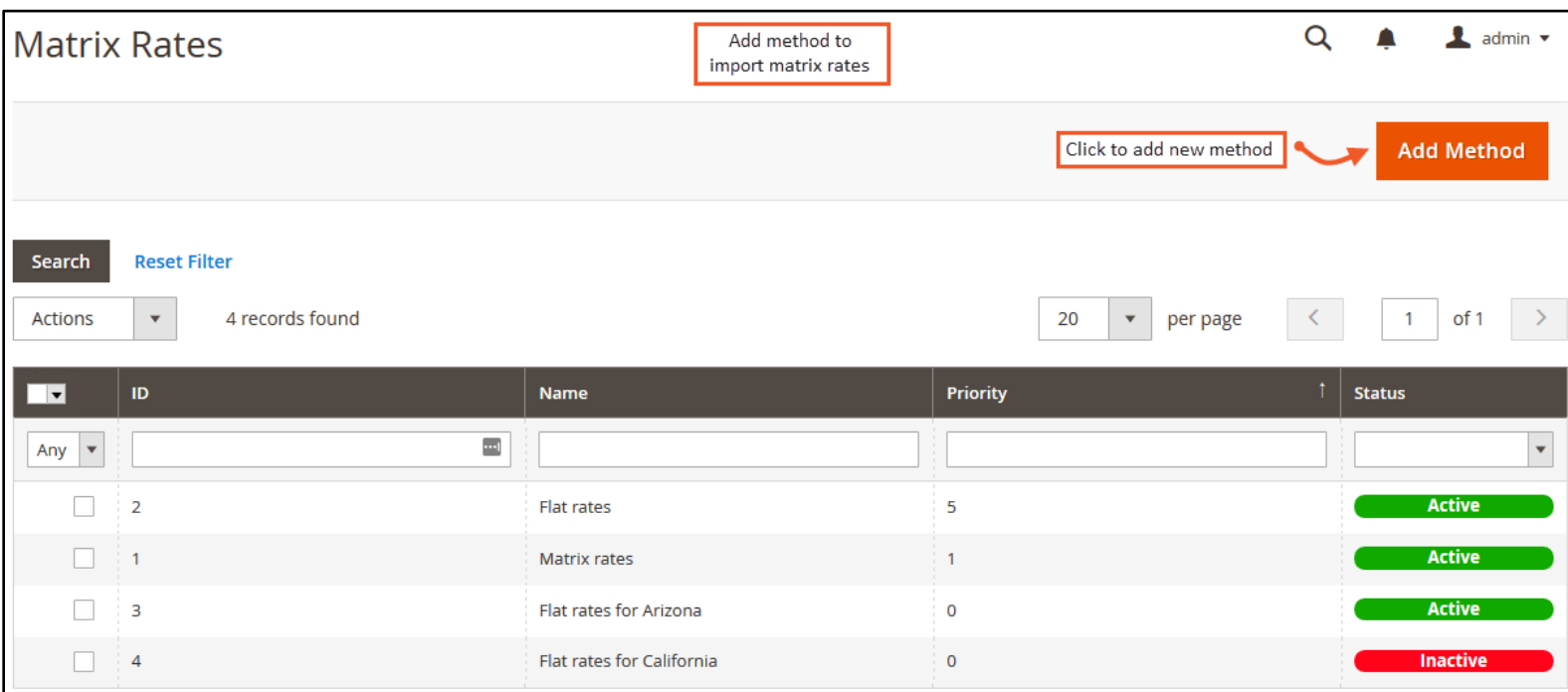
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## 1. Extension Installation

- Extract the zip folder and upload our extension to root of your Magento 2 directory via FTP.
- Login to your SSH and run below commands step by step:
  - php bin/magento setup:upgrade
  - For Magento version 2.0.x to 2.1.x - php bin/magento setup:static-content:deploy
  - For Magento version 2.2.x & above - php bin/magento setup:static-content:deploy -f
  - php bin/magento cache:flush
- That's it.

## 2. Add Method to Import Matrix Rates

To import Matrix Rates, go to **Sales** → **Matrix Rates** and add method from the “Add Method” button.



Matrix Rates

Add method to import matrix rates

Click to add new method Add Method

Search Reset Filter

Actions 4 records found 20 per page 1 of 1

Actions	ID	Name	Priority	Status
<input type="checkbox"/>	2	Flat rates	5	Active
<input type="checkbox"/>	1	Matrix rates	1	Active
<input type="checkbox"/>	3	Flat rates for Arizona	0	Active
<input type="checkbox"/>	4	Flat rates for California	0	Inactive

### • Add New Rate to Import Matrix Rates

Configure the following general settings to add new method.

- **Name:** Add name for the matrix rate method.
- **Status:** Set the status of the matrix rate as “Active” from here.
- **Priority:** Set priority for the method.
- **For Products with Different Shipping Types:**
  - **Sum Up Rates:** Summarize rates for products of different shipping types in the cart.
  - **Select Maximal Rate:** Use only rate with maximal value for shipping type.
  - **Select Minimal Rate:** Use only rate with minimal value for specific Shipping Type.
- **Stores:** Select the store view for the matrix rate method.
- **Customer Groups:** Select customer groups to assign the method.

## New Matrix Rate

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

### MATRIX RATE METHODS

[General](#)[Import](#)[Methods and Rates](#)

Set general settings for the method

### General

Name \* Flat rates

Variable {day} will be replaced with the estimated delivery value from the corresponding CSV column

Status Active

Priority 5

For products with different shipping types

Sum up rates

### Visible In

Select store view

Stores

Main Website

Main Website Store

Default Store View

Leave empty if there are no restrictions

### Applicable For

Assign the method to customer groups

Customer Groups

NOT LOGGED IN

General

Wholesale

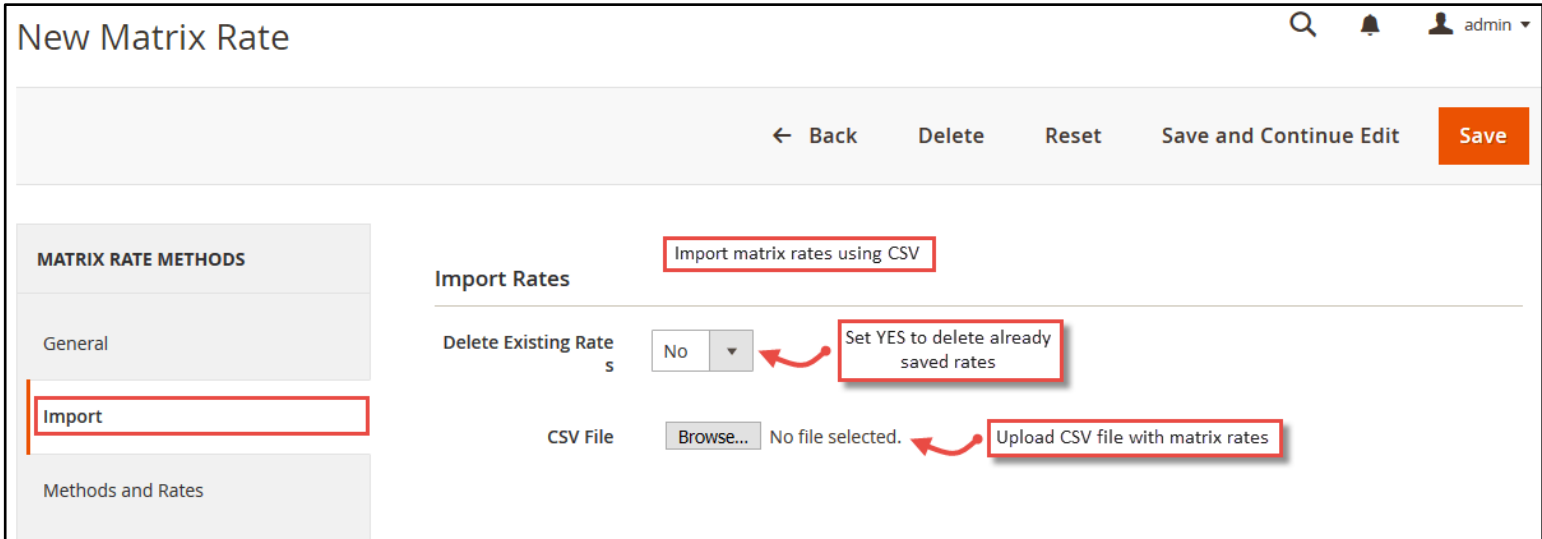
Retailer

Leave empty if there are no restrictions

- **Import Matrix Rates**

Import Matrix Rates using CSV from the Import tab in Matrix Rate Methods.

- **Delete Existing Rates:** All the existing rates will be removed when you try to save changes or import CSV with rates.
- **CSV File:** Upload CSV file with Matrix rates in a proper formatting.



New Matrix Rate

← Back Delete Reset Save and Continue Edit Save

MATRIX RATE METHODS

General

Import

Methods and Rates

Import Rates

Import matrix rates using CSV

Delete Existing Rates No

Set YES to delete already saved rates

CSV File Browse... No file selected.

Upload CSV file with matrix rates

- **Methods and Rates**

To view the imported Matrix Rates, navigate to “Methods and Rates tab” as shown below.

Here’s what the each grid column means:

- **Country:** Shows the country for which the rate will be applied.
- **State** – Shows the state for which the rate will be applied.
- **Zip From - To** – Indicates a specific postcode range. When it's filled like 'From: 20001 To: 30000' the rate will apply for all 1000 postcodes inside the 20001 - 30000 range. The UK postcode format is supported.
- **Price From - To** – Indicates the prices for products with the same shipping type will be summarized.
- **Weight From - To** - Same condition as above but for the weight attribute of the product.
- **Qty From - To** - same as above but for the quantity in the shopping cart.
- **Shipping Type** – All means the rate will be applied to all the products.
- **Rate** – The applicable rate amount for the whole order.
- **PPP** - Percentage per Product Price. Shipping will be calculated as a percentage of the product price.
- **FRPP** - Indicates Fixed Rate Per Product Price. Shipping will be calculated multiplying product quantity in the cart by the value in FRPP field.
- **FRPUW** - Indicates Fixed Rate Per Unit of Weight. The rate will be calculated based on the Weight of the product. For example, if FRPUW is set to 3.25 and Weight of the product in the cart is 4.15 then the calculation will be like this:  $2.25 \times 4.25 = \$13.48$
- **Estimated Delivery (days)** – Specifies the estimated delivery days for the shipping method. The days here will be inserted in the {day} variable which you can use in the Name field.

## New Matrix Rate

Imported matrix rates listed here

admin

← Back Delete Reset Save and Continue Edit **Save**

### MATRIX RATE METHODS

General

Import

**Methods and Rates**

Search

Reset Filter

2 records found

20

per page

1

of 1

Country	State	City	Zip From	Zip To	Price From	Price To	Weight From	Weight To	Qty From	Qty To
<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="text"/>	<input type="text"/>
All	All				0.0000	99999999.0000	0.0000	99999999.0000	0	99
United States	United States/Alaska	Alaska			0.0000	99999999.0000	0.0000	99999999.0000	0	99

### 3. Configuration

For configuring the extension, login to Magento 2, move to **Stores** → **Configuration** → **Sales** → **Shipping Methods** → **Matrix Rates** where you can find various settings to configure the extension.

- **Enabled for Checkout:** Set YES to enable Matrix Rates.
- **Title:** Enter title of the shipping method.
- **Ship to Applicable Countries:** Select countries to allow use of the shipping method.
- **Displayed Error Message:** Enter error message for shipping unavailability.
- **Allow Free Shipping Promotions:** Select YES to allow free shipping rule from shopping cart price will be applied.
- **Ignore Price and Quantity of Virtual Products:** Select YES to ignore price and quantity of virtual products while calculating shipping.
- **Numeric Zip:** Set YES to allow numeric zip codes in CSV.
- **Use price AFTER discount:** Set YES to use price after deducting discount.
- **Use price INCLUDING tax:** Set YES to use price inclusive of tax.
- **Use only one shipping type for shipping method:** When set to YES, if the shopping cart is having products with different Shipping Types, the rate with 'Shipping Types = All' will be applied instead.
- **Sort Order:** Set sort order of the shipping method to show in frontend.

# Configuration

Store View: Default Config ▾

Save Config

Meetanshi ▾

## Matrix Rates

SALES ▴

Shipping Methods

Enabled for Checkout  
[store view]

Set YES to enable Matrix Rates

Title  
[store view]

Enter title of the shipping method

Ship to Applicable Countries  
[store view]

Select countries to allow use of matrix rates shipping method

Ship to Specific Countries  
[store view]

- Afghanistan
- Åland Islands
- Albania
- Algeria
- American Samoa
- Andorra
- Angola
- Anguilla
- Antarctica
- Antigua and Barbuda

Displayed Error Message  
[store view]

This shipping method is currently unavailable. If you would like to ship using this shipping method, please contact us.

Enter error message for shipping unavailability

Allow Free Shipping Promotions  
[store view]

Select YES to allow free shipping promotions

Ignore Price and Quantity of Virtual Products  
[store view]

Set YES to ignore price & quantity of virtual products while calculating shipping

Numeric Zip  
[store view]

Set YES to allow numeric zip codes in CSV

Use price AFTER discount  
[store view]

Set YES to use price after deducting discount

Use price INCLUDING tax  
[store view]

Set YES to use price inclusive of tax

Use only one shipping type for shipping method  
[store view]

Set YES to only use one shipping type for the method

Sort Order  
[store view]

#### 4. Create Shipping Types Options

- **Create Shipping Type Attribute Options**

To create the options for 'shipping type' attribute please go to **Catalog → Products → Attributes Action → Edit Product Attribute "Shipping Type" → Manage Label/Options.**

Product Attributes Use 'shipping type' attribute to create options admin

[Add New Attribute](#)

Search [Reset Filter](#) 2 records found 20 per page 1 of 1

Attribute Code	Default Label	Required	System	Visible	Scope	Searchable	Use in Layered Navigation	Comparable
shipping_peritem	Shipping Rate	No	Yes	No	Store View	No	No	No
shipping_type	Shipping Type	No	Yes	No	Store View	No	No	No

- **Shipping Types Options**

Navigate to Properties tab in Attribute Information menu. As shown below, click "Add Option" button to add shipping type options.

shipping\_type Back Reset Save and Continue Edit [Save Attribute](#)

**ATTRIBUTE INFORMATION**

[Properties](#)

[Manage Labels](#)

[Storefront Properties](#)

**Attribute Properties**

Default Label \* Shipping Type

Catalog Input Type for Store Owner Dropdown

Values Required No

**Manage Options (Values of Your Attribute)**

Is Default	Admin *	Default Store View
<input checked="" type="radio"/>	Extra Large	Delete
<input type="radio"/>	Fragile	Delete

[Add Option](#) Click to add shipping type options

Create the options you will use for the matrix rates

- **Assign Shipping Type to Product**

Once the shipping options are created, assign value of the attribute to the product to calculate matrix rates based on.

Joust Duffle Bag ← Back Add Attribute Save

Set Product as New From  To

Country of Manufacture

Shipping Type

Activity

Extra Large

Fragile

Assign value of the attribute to the product to calculate matrix rates based on



## 5. Matrix Rates in Frontend


Once the settings are configured, add product to cart to see Matrix Rates enabled in the frontend.

- **Matrix Rates on Cart Page**

When a customer adds products to cart, and proceeds to make payment, the Matrix Rates is displayed on Cart Page as shown below.

### Shopping Cart

Matrix rates on cart page

Item	Price	Qty	Subtotal
 Fusion Backpack	A\$59.00	1	A\$59.00

Move to Wishlist ✎ 🗑️

Update Shopping Cart

Apply Discount Code ▾

#### Summary

Estimate Shipping and Tax ^

Country United States ▾

State/Province Michigan ▾

Zip/Postal Code 49628-7978

**Matrix Rates**

- Worldwide shipping **A\$15.00**
- test **A\$15.00**

Subtotal A\$59.00

Shipping (Matrix Rates - Worldwide shipping) A\$15.00

Tax A\$4.87

**Order Total A\$78.87**

[Proceed to Checkout](#)

- **Matrix Rates on Checkout Page**

Check the Matrix Rates details in order summary as shown below.

Payment Method:

Check / Money order

My billing and shipping address are the same

Veronica Costello  
 6146 Honey Bluff Parkway  
 Calder, Michigan 49628-7978  
 United States  
 (555) 229-3326


Cash On Delivery

Matrix rates on checkout page

### Order Summary

Cart Subtotal	A\$59.00
Shipping Matrix Rates - Worldwide shipping	A\$15.00
Tax	A\$4.87
<b>Order Total</b>	<b>A\$78.87</b>

1 Item in Cart ^

	Fusion Backpack	A\$59.00
	Qty: 1	

[Place Order](#)

- **Matrix Rates in My Account Page**

As shown below, the Matrix Rates method name is displayed in My Accounts page from the "My Orders" menu.

Account Dashboard

**My Orders**

My Downloadable Products

My Wish List

---

Address Book

Account Information

Stored Payment Methods

Billing Agreements

---

My Product Reviews

Newsletter Subscriptions

Out Of Stock Subscriptions

## Order # 4062018271 PENDING

June 4, 2018 Print Order

Reorder Matrix rates in orders in My Account page

Items Ordered

Product Name	SKU	Price	Qty	Subtotal
Fusion Backpack	24-MB02	<b>A\$59.00</b>	Ordered: 1	<b>A\$59.00</b>

Subtotal	A\$59.00
Shipping & Handling	A\$15.00
Tax	A\$4.87
<b>Grand Total</b>	<b>A\$78.87</b>

### Order Information

Shipping Address	Shipping Method	Billing Address	Payment Method
Veronica Costello 6146 Honey Bluff Parkway Calder, Michigan, 49628-7978 United States T: (555) 229-3326	Matrix Rates - Worldwide shipping	Veronica Costello 6146 Honey Bluff Parkway Calder, Michigan, 49628-7978 United States T: (555) 229-3326	Check / Money order

## 6. Matrix Rates in Backend

The Matrix Rates method name and value can be viewed from the Sales Order View backend as shown here.

#4062018271

← Back
Matrix rates in sales order view backend
Send Email
Hold
Invoice
Ship
Reorder
Edit

---

### Payment & Shipping Method

#### Payment Information

Check / Money order  
The order was placed using AUD.

#### Shipping & Handling Information

Matrix Rates - Worldwide shipping A\$15.00

#### Items Ordered

Product	Item Status	Original Price	Price	Qty	Subtotal	Tax Amount	Tax Percent	Discount Amount	Row Total
Fusion Backpack <small>SKU: 24-MB02</small>	Ordered	A\$59.00	A\$59.00	Ordered 1	A\$59.00	A\$4.87	8.25%	A\$0.00	A\$63.87

---

#### Order Total

#### Notes for this Order

Status: Pending

Comment:


Notify Customer by Email  
 Visible on Storefront

Submit Comment

#### Order Totals

Subtotal	A\$59.00
Shipping & Handling	A\$15.00
Tax	A\$4.87
<b>Grand Total</b>	<b>A\$78.87</b>
<b>Total Paid</b>	<b>A\$0.00</b>
<b>Total Refunded</b>	<b>A\$0.00</b>
<b>Total Due</b>	<b>A\$78.87</b>

If you have any question or need support, Contact us at <https://meetanshi.com/contacts/>


**Matrix Rates for Magento 2**

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