Version 2.75

User Guide

This document was last updated on March 31, 2005

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Welcome to ProductCart®

ProductCart is an e-commerce program that small- and medium-sized businesses use to build and manage a professional online store. This shopping cart software is the result of years of experience designing and developing Internet applications. A lot of time was spent trying to determine how to best combine advanced functionality and ease of use. ProductCart is the result of these efforts. It offers both powerful e-commerce features and an intuitive administration area that gives you the ability to manage your online store even if you don't have a technical background.

The purpose of this document is to describe the functionality of ProductCart's administration component, the **Control Panel**, and how it interacts with your storefront. Accessible with your standard browser, the Control Panel is where you will manage every aspect of your on-line store, from configuring your product catalog, to defining payment and shipping options.

ProductCart is available in two versions:

- **Standard**. A sophisticated, yet easy-to-use shopping cart for small- and medium-sized businesses Written entirely in Active Server Pages (ASP). It comes with hundreds of great ecommerce features, and most of them are described in this User Guide.
- **Build To Order**. ProductCart Build to Order is a totally unique ecommerce system that allows you to sell configurable products and services. It combines the features of the Standard version of ProductCart with a dynamic product configurator and an online quoting system. Throughout this document, we will often refer to Build To Order with the abbreviation **BTO**. For more information on how to use the Build To Order features, see Chapter 14.

New in Version 2.75

This User Guide applies to v2.75 of ProductCart, released on March 31 of 2005. If you are using an earlier version of ProductCart and do not wish to update to v2.75, please download the User Guide that corresponds to your version from the ProductCart Support Center.

Version 2.75 adds a number of new features and improvements to ProductCart, and fixes all open issues. The v2.75 Updater is available free of charge to all ProductCart v2.71 users.

Click on the "Check for Updates" link located on the Control Panel welcome page (menu.asp) to download the next available update for the version of ProductCart that you are currently running on your store. You will see the v2.75 Updater only once you have updated your version of ProductCart to v2.71.

If you are using the Apparel Add-on, the Gift Add-on, or both, make sure to download the corresponding updates and install them right after you have updated your store to v2.75. Refer to the README file included with the updated files for detailed installation instructions.

Among the new features in v2.75:

- New payment gateways:
  - CrossCheck's CheckByNet - http://www.checksbynet.com/
  - CyberSource - http://www.cybersource.com/
  - FastCharge - http://www.fastcharge.com
  - Internet Secure - http://www.internetsecure.com/
  - Paymentech - http://www.paymentech.com/
  - ProtX - http://www.protx.com/
  - USAePay - http://www.usaepay.com/
- A complete product review system that allows store customers to rate products and post feedback. Many advanced administrator settings allow store managers to personalize the way the feature works, including the ability to be notified, review and approve each review before it is posted on the Web store.
- A basic content management system that allows the store manager to use ProductCart to handle "Content Pages" (About US, Customer Service, etc.), so that all of those pages can be managed right from within the Control Panel, rather than designed with a separate HTML editor.
- Much improved custom search fields that - on the advanced search page in the storefront - automatically load all values associated with each search filter (e.g. customer selects "Wine Type" and ProductCart automatically loads a second menu with "Merlot", "Cabernet", "Chianti", etc.).
- A new built-in HTML editor, vastly superior to the current one, and compatible with Netscape and FireFox. ProductCart now includes an award-winning HTML editor published by InnovaStudio (http://www.innovastudio.com/editor.asp).
- Support for multiple electronic coupons for the same order. For example, customers could use a coupon to obtain free UPS® Ground shipping, and other one to enjoy a 10% discount on the items they are purchasing, within the same order.
- Support for SMTP servers that require authentication (for those email components that support this feature).
- Many other new store management tools, including:
  - the ability to "copy" existing cross selling relationships to other products;
  - a way for the store manager to more easily enter a phone order for an existing customer by automatically logging into the customer's account and using the storefront on his/her behalf;
  - a stronger order export feature;
  - a way to more quickly update price changes for multiple products at once;
  - a way for the store manager to easily merge orders for different customer accounts and consolidate them under a single account;

- a way for the store manager to enforce a minimum order quantity on a product by product basis (with or without enforcing the quantity multiplier, a feature that is already available);
  - the ability for the store manager to delete previously uploaded images from the server.
  - a new version of the dynamic category navigation included in the default version of header.asp (and available for download from the ProductCart Developer's Corner);
  - an update "search box" that allows customers to search on a product's name, description and part number. Updated code for the search box can be downloaded from the ProductCart Developer's Corner.
- Performance improvements were made to number of areas both in the storefront and in the Control Panel. More and more stores using ProductCart are running large product databases and experience heavy traffic, and they helped us locate and fix a series of performance "bottle-necks".

For a complete list of new features, please visit the Early Impact Web site.

Skill Requirements: Using & Customizing ProductCart

Using ProductCart does not require that you know any programming language. The Control Panel allows you to define virtually all properties of your on-line store through an intuitive, point-&-click interface, which can be accessed using a standard Web browser.

A basic knowledge of HTML however, will help you take full advantage of ProductCart's features. For example, ProductCart can generate for you HTML links that can tie any static page on your Web site to your on-line store. In this scenario, simply being familiar with how HTML links work allows you to connect any area of your existing Web site to your storefront. For more information on this feature, see the Generate Links section of this document.

Customizing your storefront's graphical interface is another area in which a basic understanding of how HTML pages are structured can be helpful. For more information on how to personalize the appearance of your ProductCart store, see Customizing Your Store's Graphical Interface.

For an introduction to HTML, try these Web sites:

http://www.htmlgoodies.com/primers/basics.html

http://www.w3schools.com/html/html_intro.asp

If you would rather hire a professional to help you integrate ProductCart with your existing Web site, or design a completely new graphical interface for your Web store, **contact a ProductCart reseller**. These are companies that have developed an expertise in building complete ecommerce Web sites powered by ProductCart. You can find a list at the following URL:

http://www.earlyimpact.com/partners.asp

When you purchase ProductCart, you will receive the program's full **ASP source code**, where ASP stands for Active Server Pages, a popular programming language developed by Microsoft®. If you are an experienced programmer, this will allow you to further customize the application to exactly meet your needs. However, note that Early Impact will not be able to provide technical support on your efforts to modify the ASP source code, nor on areas of ProductCart where code has been modified by you.

If you are familiar with ASP and are looking to customize ProductCart to better meet your needs, you may want to visit the **Developer's Corner** located on the Early Impact Web site at the following address. It contains code snippets that might be useful in your project. Some of the appendixes located at the end of this User Guide provide additional technical information.

http://www.earlyimpact.com/productcart/support/developers.asp

If you are not familiar with ASP, but are still looking to add new features to ProductCart or modify existing features to better meet your needs, we encourage you to contact a Certified ProductCart Developer for a quote. These are companies that have ASP programmers on staff and are experts at customizing ProductCart's ASP source code.

http://www.earlyimpact.com/partners-dev.asp

Before embarking on a project that involves customizing ProductCart's source code, please note that updating ProductCart when new files are released becomes a more time consuming task as some of the files that you have modified might also have been updated by Early Impact. If that is the case, the only solution is to compare the source code of the two files and reapply your changes to the latest version of the file. This is often not a difficult task, but it is certainly a time consuming one. Make sure to clearly comment the changes you are making to the ASP source code (or ask your developers to do so): it will help speed up the process of synchronizing those files with updated ones if and when a ProductCart update is released.

System Requirements: Web Server Compatibility

ProductCart uses **Active Server Pages®** (ASP), a popular programming language developed by Microsoft® for Web-based applications. The basic requirement for ProductCart is that your on-line store is hosted on a Web server that features support for ASP 3.0 by using IIS 5.0 or above. In addition, your Web server must support either a **Microsoft Access®** or **Microsoft SQL®** database. The same version ProductCart supports both databases (i.e. there is no SQL version of ProductCart): see Chapter 2 for more information about setting up the database.

Contact your Web hosting provider to make sure that your Web server can support ProductCart. Typically, **Windows® 2000 Server®** and **Windows 2003 Server®** Web hosting packages meet these requirements.

> **Note**: ProductCart uses server sessions extensively and therefore does not support load balanced servers. Most Web hosting companies do not host Web sites on load balanced servers. Typically, if you are assigned an IP address it means that you are not being hosted in a load-balanced environment. If your are not provided with an IP address that points to your Web site, then ask your Web hosting company whether the server that hosts your files is load balanced. If so, have them move your Web site to a non-load balanced server.

In addition to the general system requirements mentioned above…

- In order to use dynamic shipping providers for your shipping options and/or PayPal, Authorize.Net, and many of the other payment gateways supported by ProductCart, the web server must have the free Microsoft XML Parser 3.0 SP2 or greater installed.

- ProductCart allows you to upload images to your store from within the Control Panel. There are two utilities in ProductCart that allow you to do so: (1) a simple upload utility (the images are uploaded 'as is' to the Web server), and (2) an Upload & Resize utility which allows you to dynamically create 3 images from a source image file that is uploaded to the server (thumbnail, standard, and detail image). The Upload & Resize utility provides great time savings when adding products and categories to your store. However, in order to use this feature your Web server needs one of the following combinations of components installed on the server:
    - ASPJpeg 1.1 or higher and ASPUpload 3.0 or higher installed. Both server components are published by Persists Software (http://www.aspupload.com). This configuration allows you to upload & resize both Jpeg and Gif files.
    - SAFileUp and ASPImage, where SAFileUp is a server component published by Software Artisans (http://fileup.softartisans.com) and AspImage is published by Server Objects (http://www.serverobjects.com/comp/Aspimage.htm). This configuration allows you to upload & resize both Jpeg images, but not Gif files.

  Note that when either of these server components are not detected, ProductCart automatically hides any link to using the Upload & Resize utility, and instead shows the standard image upload feature. This server component is rather popular, so there is a good chance that your Web hosting company has installed it on its servers. Enquire with your hosting company to confirm its presence.

- To ensure that confidential information is transferred securely between your customers' browser and your Web server, you will likely want to use SSL (Secure Socket Layer) on your store (e.g. you will be collecting credit card information). If this is the case, please note the following:
    - You can always use a dedicated SSL certificate (they can cost as little as $50/year). Here are a few providers: DigiCert, GeoTrust, Instant SSL, Thawte, VeriSign. This is definitely the recommended way to go, as customers never leave your "domain" (e.g. they will remain on "www.YourStore.com" and the only change will be that "http://" will switch to "https://").
    - You can use a shared SSL certificate provided by your Web hosting company as long as the certificate is installed on the same server where your Web site is hosted. You cannot use a shared SSL certificate if it's installed on a different Web server. In addition, you cannot use the Parent Path Disabled version of ProductCart with a shared SSL certificate.
    - In addition, please note that ProductCart does not support the scenario in which a hosting company forces a customer to place to-be-secure pages in a special directory on the Web server. This is a rather rare occurrence

System Requirements: Browser Compatibility

In order to use ProductCart, you will not install anything on your desktop. Instead, you will use your Web browser to manage your store. To access the administration console through which you will manage your store, the **Control Panel**, we recommend that you use **Microsoft® Internet Explorer 5.0** or above on a Windows computer. This is mostly due to the fact that the Control Panel uses advanced JavaScript code for selected features: those features may not work properly when using other browsers (or when using IE on a MAC). If you are using a Macintosh, do not use Internet Explorer, but rather the latest version of either Netscape of FireFox.

Note that for the Control Panel navigation to work properly "Active Scripting" needs to be enabled in the Internet Explorer security settings (it is enabled by default).

To download the latest version of Internet Explorer, use the following link:

http://www.microsoft.com/ie

We understand that there are many people that do not like using Microsoft's Internet Explorer and the good news is that many other browsers are 99% compatible with ProductCart's Control Panel. Specifically, our research shows the following:

- The latest version of **Netscape** (7 and above) appears to be fully compatible with the Control Panel, although compatibility with Netscape has not been tested and cannot be guaranteed. The only feature that does not seem to work properly is the *Set Display Order* feature in both the *Payment Options* and *Shipping Options* areas of the Control Panel (see Ordering Payment Options and Ordering & Displaying Shipping Options).

  Specifically, when you click on the *Move Up* and *Move Down* buttons, the selected item does not seem to move and its name is replaced by the name of the item that you are moving it above or below. However, when you click on the *Save* button, you will see that your changes have actually been recorded correctly. These are features that you will rarely use and that certainly do not interfere with your ability to install, setup and manage your ProductCart-powered store.

- Known compatibility issues exist with Netscape Navigator 4.7x, and therefore we discourage you from using that and earlier versions of the Netscape browser.
- The latest version of **Apple's Safari** browser is compatible with ProductCart's Control Panel, except for the features listed above under "Netscape" and for the built-in HTML editor. The built-in HTML editor is something that you may frequently use. For this reason, if you are using a MAC we recommend that you use either FireFox or Netscape.
- The latest version of Mozilla's **FireFox** appears to be fully compatible with ProductCart's Control Panel, except for the features listed above under "Netscape".

Note: If you access the Internet through American On Line® or CompuServe® you may experience sporadic problems using ProductCart's Control Panel. The problems have to do with the way pages are cached on the AOL and CompuServe networks. For example, when you add a product using the Product Wizard, you may not be able to add a second product using the Wizard until you restart your computer. The Wizard would attempt to add the first product again, due the way data was cached on your computer as you added the first product.

Technical Support

If this User Guide does not contain the answer to a question or problem that you may have with ProductCart, please visit the ProductCart technical support area using the links below:

a. Support home: http://www.earlyimpact.com/productcart/support/
b. Knowledge base (FAQs): http://www.earlyimpact.com/kb.html
c. Developer's Corner: http://www.earlyimpact.com/productcart/support/developers.asp
d. Open a support ticket: https://www.earlyimpact.com/productcart/support/support_form.asp

Technical support is available for free at these addresses in the form of a searchable and updated database of frequently asked questions, technical articles, information and code samples for ASP developers, and more. In addition, your ProductCart purchase includes **same-version updates** and **e-mail support** at no extra charge for life.

If you are updating from version 2.71 to version 2.75, for example, that is considered a same version update and it is free. But if you wanted to upgrade to version 3.0, when available, that would not be considered a same-version update and you would be charged a fee. Existing ProductCart users are typically eligible for a discount when upgrading their version (a release date for v3.0 of ProductCart has not yet been set).

You can check for software updates by using the *Check for Updates* link located on the start page of your ProductCart Control Panel, which is the first page that is loaded when you log into the Control Panel.

To submit an e-mail support request, visit the ProductCart technical support area at the address listed above. Technical support via telephone is not available on ProductCart at this time.

About Early Impact

Early Impact is a software development company focused on delivering powerful, yet user-friendly electronic commerce applications to small- and medium-sized businesses. Early Impact's goal is to build unique, cutting-edge e-commerce software that allows businesses to effectively use the Internet as a sales channel for their products and services.

Founded in 2001, Early Impact is a Limited Liability Corporation (LLC), privately owned and headquartered in San Francisco, California. For more information, please visit the company's Web site located at: http://www.earlyimpact.com

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Acknowledgments

Limited areas of ProductCart v1.0's original store database and small portions of its storefront source code were based on open source e-commerce software developed by **Comersus**. For more information on Comersus, please visit the company's Web site at: http://www.comersus.com.

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8. GENERAL.

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8.2. Entire Agreement.

This Agreement, along with other documents expressly referenced in this Agreement, constitutes the final and complete understanding between the parties, and replaces and supersedes all previous oral or written agreements, understandings, or arrangements between the parties with respect to the subject matter contained in this Agreement.

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This Agreement may not be modified or amended except in a writing signed by an authorized officer of each party. The failure of either party to enforce any provision of this Agreement shall not be deemed a waiver of the provisions or of the right of such party thereafter to enforce that or any other provision.

8.4. Notices.

Except as otherwise provided in this Agreement, notices required to be given pursuant to this Agreement shall be effective when received, and shall be sufficient if given in writing, hand-delivered, sent by facsimile with confirmation of receipt, sent by First Class Mail, return receipt requested (for all types of correspondence), postage prepaid, or sent by email to the following address: info@earlyimpact.com.

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Without the prior written consent of the other party, neither party shall disclose the terms and conditions of this Agreement, except disclosure may be made as is reasonably necessary to the disclosing party's bankers, attorneys, or accountants or except as may be required by law.

8.6. Governing Law and Jurisdiction.

This Agreement shall be governed by and construed in accordance with the laws of the State of California.

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In case any provision of this Agreement is held to be invalid, unenforceable, or illegal, the provision will be severed from this Agreement, and such invalidity, unenforceability, or illegality will not affect any other provisions of this Agreement.

8.8. Attorney's Fees.

In the event of any dispute between the parties arising out of this Agreement, the prevailing party shall be entitled, in addition to any other rights and remedies it may have, to recover its reasonable attorney's fees and costs.

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Chapter

2

Getting Started

Before you can start using ProductCart, the software must be installed[1] on your server and activated. You will not be able to log into your store's Control Panel and use ProductCart unless the software has been successfully activated. Therefore, please take a few minutes of your time to carefully read through the following pages. Our experience has indicated that the vast majority of issues that new users of ProductCart may encounter are the result of not properly activating the software.

In order to make the activation process as smooth as possible, ProductCart includes a user-friendly **Setup Wizard** that will take you through all the necessary setup steps. Among other things, the Setup Wizard will perform a series of system checks on your Web server to ensure that the server can successfully host a ProductCart-powered store.

To install and activate ProductCart, follow the steps outlined below.

Installation

Download the latest copy of ProductCart from the Early Impact Web site. A link to the file will be provided by Early Impact as soon as the purchase is determined to be legitimate. Due to the high rate of fraudulent orders that a software company like Early Impact receives, we have to personally verify each order. Typically this takes less than an hour, but it may take longer during a weekend or on a holiday. We thank you in advance for your understanding on this matter.

If you purchased the software from an Early Impact reseller, you should have been provided a download link by the reseller, or the reseller may take care of the installation for you.

All ProductCart files are contained in a compressed (*.zip) file. Download and "unzip" the file on your local computer using your favorite unzip utility. If you don't have an unzip utility, you can download a popular one at the following address: http://www.winzip.com/

Once you have unzipped the file you will notice that it contains two folders: one called *Standard* or *Parent Paths Enabled*, the other one called *Parent Path Disabled*. They both contain a subfolder called *ProductCart*. Each *ProductCart* folder contains all the files that you need to upload to your Web server to setup and use your new shopping cart. You will use one *ProductCart* folder or the other depending on whether *Parent Paths* are enabled (more likely) or disabled (less likely) on your Web server.

If you are not sure whether or not your Web server has parent paths enabled or disabled, contact your Web hosting company, or simply upload the contents of the *Standard* or *Parent Paths Enabled*

[1] Technically speaking, ProductCart is actually not installed on the Web server. All files are simply transferred to the Web server via FTP. ProductCart files reside in the "ProductCart" subdirectory.

folder to your Web server, and run the *ProductCart Setup Wizard*, which will detect this server setting for you. You can also download a script from the ProductCart Support Center (look in the "Other Support Resources" section). Download the script, unzip it, and upload it to your server, then simply load the page in your browser to find the answer to this question.

If *Parent Paths* are *Disabled*, please use the files contained in the *Parent Path Disabled* folder.

If you have already uploaded to your Web server the files contained in the *Standard* folder, and later discover that your Web server has *Parent Path* disabled, you will need to either have your Web hosting company enable *Parent Paths* on the Web server, or delete the entire *ProductCart* folder already on your server, upload the *ProductCart* folder contained in the *Parent Path Disabled* folder to your server, and run the setup again.

For more information about running ProductCart on a server with *Parent Paths* disabled, please refer to Appendix H.

The *productcart* folder contains several subfolders. Make sure not to change any of the files or folder names, or alter the folder structure, except for the following:

- You are encouraged to change the name of the folder containing your MS® Access database. See Appendix E for information about why it is a good idea to change the MS® Access database name and the name of the folder that it contains it (this does not apply to stores using a MS® SQL database).
- You are encouraged to change the name of the "pcadmin" folder. See Appendix G for information about changing the name of the "pcadmin" folder.
- You may also change the name of the "productcart" folder. Do not remove the "productcart" folder. If you wish to rename it, see Appendix G for more information.

Use your favorite FTP program to **upload** the *productcart* folder "as is" to the root directory of the Web site that will be hosting the online store. So the address of your store's home page, for example, should be something like: http://www.yourcompany.com/productcart/pc/.

ProductCart is made up of over 1,000 ASP, HTML and other files. Therefore, the process of uploading them to your Web server could take several minutes, depending on the speed of your Internet connection. Be patient as the file transfer completes: it is crucial that all files are correctly transferred to your server. If for any reason the transfer is interrupted (e.g. your Internet connection is terminated), we recommend that you begin the process from scratch to make sure that all files are uploaded to the server.

Using a MS® SQL vs. Access database

By default, ProductCart uses a Microsoft® Access database. Access performs well on stores that experience limited concurrent traffic, but it tends to slow down when there are several users running queries at the exact same time (i.e. "concurrent" users). In other words, if several users were searching for a product on your online store at the exact same time, the store could experience a decrease in performance. If the same store were using a MS SQL database, the performance would likely not be affected.

Because running a store that uses a MS SQL database can be more expensive and require more expertise than running an online store that uses an Access database, many small- and medium-sized businesses opt to use Access. Truly, in the vast majority of cases, their online stores never experience performance problems because the likelihood of visitors querying the store database at the exact same time is rather small.

You can use ProductCart either with a Microsoft Access or a SQL database. There is no price difference between the two versions and the code that allows you to modify an existing SQL database for use with ProductCart is already included in the software that you have downloaded.

<u>If you opt to use Access</u>, there is nothing that you need to do. The database is already setup and ProductCart will connect to it using the database connection string that you will specify during the activation process, as explained later in this chapter.

<u>If you opt to use SQL</u>, make sure to setup the database right <u>after</u> moving the files to the server that will host the store, but <u>before</u> you attempt to activate the product. Otherwise you will get an error during the activation process indicating that ProductCart is unable to connect to the database. For an explanation of the tasks that you need to perform to use ProductCart with a SQL database, please see Appendix F. If you are not comfortable setting up the SQL database: (a) if you are buying ProductCart from Early Impact, you can choose the installation service before or after you purchase the software, and the SQL database will be setup for you; (b) if you are buying ProductCart from an Early Impact reseller, ask them for assistance with this task.

> **<u>Note</u>**: ProductCart's SQL database has been optimized for use by small businesses. If your database contains a large number of products and other data, we recommend that you consult a database administrator (DBA) to further optimize it to achieve higher performance. As your database gets larger and larger, a good practice is to have a DBA optimize it every few months.

> **<u>Note</u>**: Moving from an Access to a SQL database once the database has been populated and orders have been processed on the store is still possible, but it can be difficult and it may require hiring a database administrator (DBA). If you have a high-traffic Web site and therefore expect several concurrent users on your store (i.e. browsing and buying at the exact same time), you should consider using ProductCart with a SQL database from the very start. If you need to move from an Access to a SQL database, contact Early Impact or your Early Impact reseller for assistance.

Setting Folder Permissions

Now that the root directory (or subdirectory) on your Web server contains the *productcart* folder with all of its subfolders, you will need to edit its permissions to have "**read/write**" access. Make sure to set permissions for both the *productcart* folder and all of its subdirectories. In addition, edit the permissions for the *includes* subfolder to have "**read/write/delete**". Therefore, all folders contained in the *productcart* folder should have "read/write" access, and the *includes* folder should also have "delete" access. Note that "delete" can also be referred to as "modify".

Many Web hosting companies provide their customers with an administration area that allows them to change folder permissions. Some other Web hosting companies require that you send a message to their technical support department. If so, send a message that says something like:

"Please add 'read/write' permissions to the 'productcart' folder and its subfolders, and 'read/write/delete' access to the 'includes' subfolder". They should be able to perform this task very quickly. Permissions are set for the "everyone" or "browser" user.

If you don't know whether your Web hosting company provides the ability to edit folder permissions, or do not feel comfortable performing this task, ask your Web hosting provider for assistance.

Defining a database connection

ProductCart supports both DSN and DSN-less database connection methods. You will be required to provide a connection string when activating ProductCart. The Setup Wizard will test the validity of your database connection string and only allow you to activate ProductCart if you have a valid database connection. The procedure to activate your copy of ProductCart is discussed in the next section. Below are examples of connections strings that you may use.

Using a DSN connection

A Data Source Name (DSN) is basically a link on your Web server that points to a database file. If you are not familiar with creating a DSN, contact your Web hosting provider and they will be able to assist you. Many Web hosting companies have an administration area that allows you to easily create a new DSN.

Create a new DSN, give it any name you wish, and point it to the ProductCart database (*EIPC.mdb*), which by default is located in the *database* subfolder of the *productcart* folder. You can place the database in any other folder on your Web site, and change its same (e.g. "myDatabaseFolder/myDatabase.mdb"). Just make sure to give the folder 'write' permissions, and to point the DSN to the correct file. For added security, you can place the database in a folder that does not have browser access and/or password-protect it. For more information, see the Database Security section of this document (Appendix E).

If you are using the SQL version of ProductCart, use a connection string structured as shown below, where *SQLDSN* is the name you defined for the connection (e.g. "productcart"), and *userid* and *password* are the user ID and the password defined for the connection:

```
DSN=SQLDSN;UID=userid;PWD=password
```

If you are using the MS Access version of ProductCart, use a connection string structured as follows, where *AccessDSN* is the name you defined for the connection (e.g. "productcart"):

```
DSN=AccessDSN
```

Using a DSN-less connection

There are several ways to connect to a database using a DSN-less connection. You should enquire with your Web hosting company to see which one they recommend. Here is an example connection string that will work with most servers.

MS Access. In the following sample connection string "c:\anydatabase.mdb" is the physical path to your database and "anydatabase" is the name of your Access database:

```
DRIVER={Microsoft Access Driver (*.mdb)};DBQ=c:\anydatabase.mdb
```

MS SQL. Here "SERVER-IP" is the server's IP address, "DB-NAME" is the name of the database, and "USER" and "PWD" are the user name and password that grant access to it:

```
Provider=sqloledb;Data Source=SERVER-IP,1433;Initial Catalog=DB-NAME;User Id=USER;Password=PWD;
```

Getting ProductCart setup on a Windows® XP Professional Workstation

If you are Web designer working on a project locally (e.g. a workstation powered by Microsoft® Windows XP Professional), you can certainly have ProductCart run locally and then upload it to your client's Web server. However, if you plan to run ProductCart using a MS SQL database, but are going to run it locally on your workstation using a MS Access database, remember that porting a database from MS Access to MS SQL is not a simple task and typically requires the assistance of a DBA (in our experience, a DBA should be able to assist you with the task with a few hours of work).

You cannot run ProductCart (or any other ASP application) on Windows XP Home Edition.

To set up ProductCart on a Windows XP Pro workstation, follow these steps (the steps are very similar if you are trying to set up ProductCart on a Windows 2000 Workstation):

1. **Ensure that IIS has been installed**. Look for the folder *Inetpub* located in the root of your hard drive. If the folder is not there, you will need to install IIS (Internet Information Services) on your computer. IIS comes with Windows XP Professional. To do so, follow these instructions
    a. Select *Start* > *Control Panel*
    b. In the *Control Panel* window select *Add/Remove Programs*
    c. In the *Add/Remove* window select *Add/Remove Windows Components*
    d. In the Wizard window check *Internet Information Services*, and click *OK*. Windows may prompt you to insert the Windows XP Professional CD-Rom into your CD-Rom Drive.
    e. An *Inetpub* folder will be created on your hard drive, and a *wwwroot* folder will be created within it.
    f. Open the *Inetpub* folder, and find a folder named *wwwroot*
    g. Create a new folder, like "myStore", under *wwwroot*.
    h. Copy and paste the "productcart" folder into the folder that you just created. Once you have set up folder permissions and a database connection as explained below, you will be able to access the ProductCart Activation Wizard by going to the following URL:

        http://localhost/myStore/productcart/setup/

2. **Set folder permissions**. Folder permissions are <u>not</u> set through the IIS console, but rather at the folder level. In other words, you need to navigate to the *productcart* folder, then right click on it and select *Properties*. In order to be able to set folder permissions, make sure that the *Security* tab is shown when you access a folder's *Properties* window. If the *Security* tab is now shown, select *Tools* > *Folder Options* > View and uncheck *Use Simple File Sharing*. Then it will show.

a. To assign "Read/Write" permissions to the *productcart* folder and all of its subfolders: navigate to the *productcart* folder from *My Computer*, right-click on it, select *Properties* and then click on the *Security* tab. You can now set "Read/Write" permissions by simply selecting the user in the top part of the screen, and checking the correct permission options in the lower part of the screen. Typically, you will use set permissions for the "IUSR_MachineName" user (where "MachineName" is the name of the server) on a production server, and for the "Everyone" user when developing locally on your workstation. To add a user, simply click on the *Add* button, enter the user name (e.g. "Everyone") and click *OK*.

b. To assign additional "Delete" permissions to the *includes* subdirectory of *productcart*, you will need to click on the *Advanced* button on the same window, select the user again, then click on *Edit* and select the *Delete* option in the *Permissions* area.

More specific instructions on how to set folder permissions are beyond the scope of this document, and they differ depending on the operating system that you are using (e.g. Windows 2000 vs. Windows XP). Please refer to the Windows® online help for more information.

3. **Set up a database connection**. The easiest way to do this is to create a system DSN that points to ProductCart's database. To create a system DSN, select *Start > Control Panel > Administrative Tools > Data Sources (ODBC)*, then click on the *System DSN* tab and create a new DSN. Simply browse to the folder that contains the MS Access database, select it and name the DSN. You will use this name during the ProductCart activation procedure.

Note: If you attempt to activate ProductCart without having set the correct folder permissions, the Setup Wizard (see later this chapter) will notify you that the necessary folder permissions have not been set correctly, and will not allow you to proceed with the activation until they are correctly configured.

Obtaining a License

When you purchase ProductCart, you will be provided with a ProductCart license. A ProductCart license consists of the following information:

- **License Key –** An alphanumeric string of characters that uniquely identifies your store.
- **Temporary User ID** – Your administrative user name. User name and password are needed not only to activate ProductCart, but also to access the Control Panel. You can change the User ID at any time after the first time you log into the Control Panel.
- **Temporary Password** – You need your password to access the Control Panel. You can change this temporary password to one of your choice at any time.

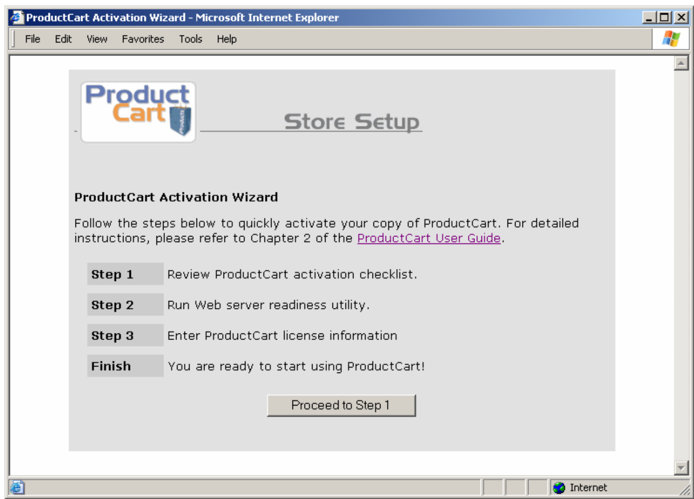
You will need this information, together with the database connection that you just created, to activate your store. If you purchased ProductCart, but have not received an e-mail message or other document containing the license information listed above, contact Early Impact or your Early Impact reseller. You will not be able to proceed without this information.

Make sure that you have performed all the tasks listed above (uploading ProductCart files, setting up a database connection, editing folder permissions, gathering your license information), then proceed with the next section.

Activating your store: the Setup Wizard

To help you get started with ProductCart as quickly as possible, the system features a Setup Wizard that will guide you step by step through the activation process. To start the Setup Wizard, gather the information listed above, then load the following page:

http://www.YourStore.com/productcart/setup/



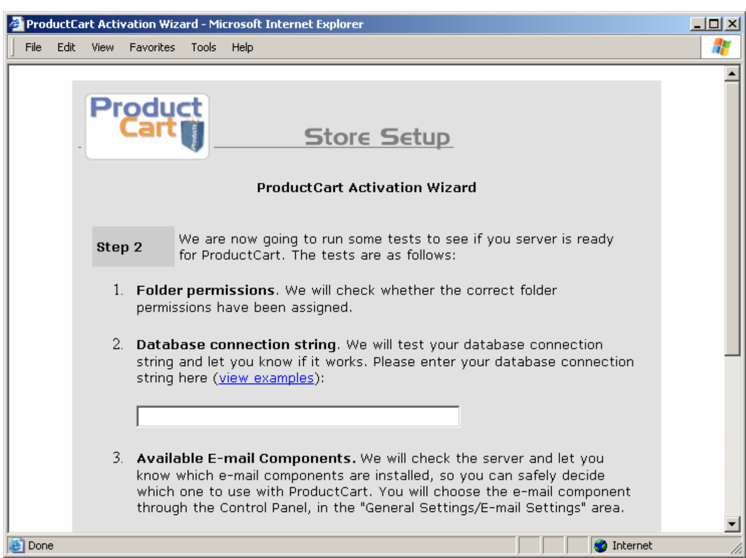
The ProductCart Setup Wizard consists of a few steps outlined in the window that is initially displayed to you. First you will be asked to review an "Activation Checklist", whose purpose is to make sure that you have everything you need to quickly get started with ProductCart.

Then, ProductCart will encourage you to review a series of Security Tips that are meant to minimize unauthorized access to your store and store data. Since some of them involve editing the database connection, it is a good idea to review them now, while you are creating your database connection.

Please review this information carefully before proceeding:

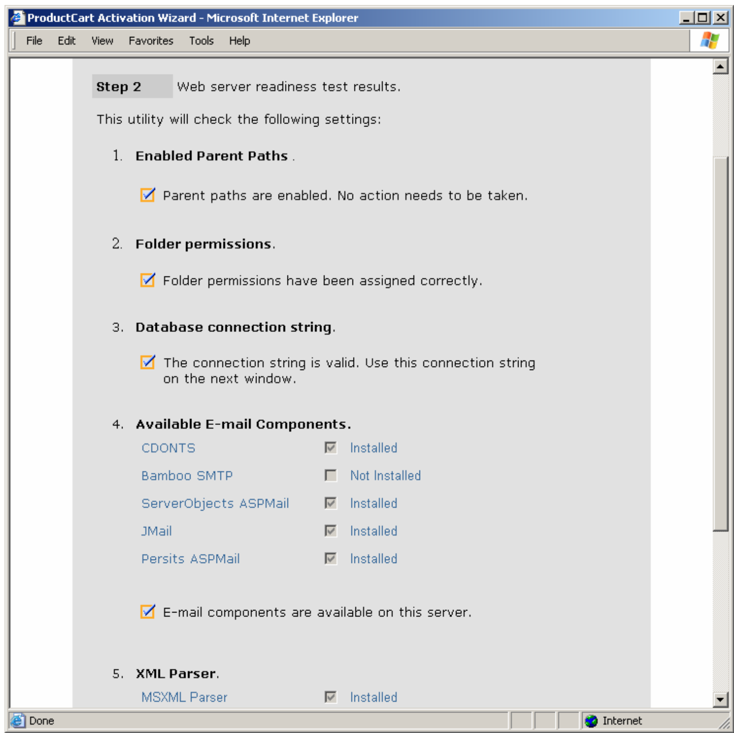
- **Change the name of your MS Access database, and of the folder that contains it**. This does not apply to ProductCart stores that use a SQL database. Please refer to Appendix E for more information.
- **Password-protect your MS Access database**. This does not apply to ProductCart stores that use a SQL database. Please refer to Appendix E for more information. If you password protect your MS Access database, remember to edit your database connection string to include the password, or the Setup Wizard will return a message indicating that it was not able to connect to the database. For example, if you are using a DSN connection: "DSN=productcart" becomes "DSN=productcart;PWD=yourPassword". If you are using a DSN-less connection: "Driver={Microsoft Access Driver (*.mdb)};DBQ=c:\database.mdb" becomes "Driver={Microsoft Access Driver (*.mdb)};DBQ=c:\database.mdb;PWD=password"

- **Regularly change your Control Panel password**. You can do so from within the Control Panel, under *General Settings/Change Password*. We recommend that you change your Control Panel password every month or two, and whenever someone that had access to it no longer works for your company. In addition, you can take advantage of ProductCart's ability to support multiple system administrators with different permission levels to restrict access to certain areas of the shopping cart to people in your staff that do not need full administration access to the system.
- **Change the name of the "pcadmin" folder**. Once you have activated ProductCart, you can change the name of the folder that contains all the files that are used for your store's administration area (the Control Panel). For more information, please see Appendix G.
- **Backup your store**. Regularly backup your store to ensure quick and effortless recovery in case your store needs to be restored for any reason (e.g. hardware failures, unauthorized access, change of Web server, change of Web hosting company, etc.). This task should be performed on a weekly basis, more often for busy stores. You should back up the following store data:
    - Your store database (if you are using MS SQL, enquire with your Web hosting company to find out how often they back it up for you)
    - The *includes* folder, which contains a variety of store settings (include in backup when you have edited any of the store settings)
    - Any *ProductCart* files that you have modified to better meet your needs (include in backup any file that was recently edited)

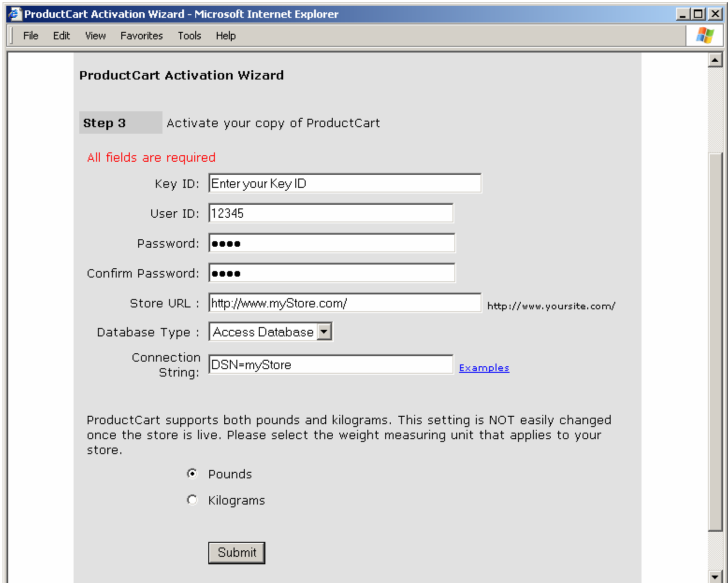


The Setup Wizard will then run a series of tests to verify that your Web server is ready to host a ProductCart-powered store, including checking the validity of your database connection string. The tests are:

- Whether or not the Web server supports "parent paths". Refer to Appendix H for more information about running ProductCart on a store that has parent paths disabled.
- Whether the correct folder permissions have been set.
- Whether a valid database connection string has been entered.
- Whether the store has one or more e-mail components installed, so you can select a supported e-mail component when configuring e-mail settings.



The results page will provide information on each of the tests. If everything is ready, proceed to the next step, where you can enter your license information and finish the activation process. Otherwise, correct any problem found by the Wizard and run the tests again (e.g. folder permissions have not been correctly set, or the database connection string is invalid).



The following is a description of the fields displayed on the Setup Wizard's final screen:

- **Key ID**: An alphanumeric string of characters that uniquely identifies your store. This is part of the ProductCart license that you should have received when you purchased your copy of ProductCart. Save this information for future reference.
- **User ID**: A temporary, random user name assigned to you. This is part of the ProductCart license that you should have received when you purchased your copy of ProductCart. You will be able to change the User ID through the Control Panel, after you have activated the store.
- **Password**: A temporary password assigned to you. This is part of the ProductCart license that you should have received when you purchase your copy of ProductCart, and it can be changed at any time after activating the software. Enter the same password in the *Confirm Password* field to ensure that you have not inadvertently misspelled it.
- **Store URL**: This is the path to the *productcart* folder that you have uploaded to your store. If you uploaded the *productcart* folder to your root directory, this path coincides with your store URL, e.g. "http://www.mystore.com/". If you placed the *productcart* folder in a subdirectory called *mystore*, the URL would be "http://www.mystore.com/mystore/".
- **Database Type**: ProductCart supports either MS Access or SQL databases. Select the database type that you will be using.
- **Connection String**: This field will be pre-filled with the database connection string that you have entered on the previous screen, and which was validated by the Setup Wizard.
- **Pounds vs. Kilograms**: This option allows you configure your store to handle weights with either pounds or kilograms. ProductCart supports both. This setting is NOT easily changed once the store is live. Select the weight measuring unit that applies to your store.

Fill out the setup form completely and press the *Submit* button. Note that all entries are required and case sensitive. If the activation is **successful**, the Control Panel login page will be displayed. Refer to the next section for information about logging into your Control Panel.

If at any time you need to edit some of the settings specified on this form (e.g. new database connection string), you can run the Setup Wizard again.

> **Note**: For security reasons, make sure you keep your License Key, User ID and Password in a safe place. The password protects unauthorized access to your store's Control Panel. The License Key is used by ProductCart not only to uniquely identify your store, but also to encrypt and decrypt personal information stored in the store database, including credit card information (for more information about when and how credit card information is collected by ProductCart, see the *Payment Options* section of this manual). To reduce the changes of unauthorized access to your Control Panel, please review the security recommendations mentioned earlier in this chapter.

> **Note**: Also for security reasons, ProductCart automatically renames the *setup* folder to a new, random numeric name, if the Web server has *Delete/Modify* permissions on that folder. This security measure is meant to minimize the chances of a hacker attempting to gain access to the system by using the forms that are part of the Setup Wizard.

Accessing the Control Panel

After activating your store, the Control Panel login page will automatically be displayed. This is your entry point into the administration area of your online store. To load the same page at a later time, bookmark the following URL in your browser:

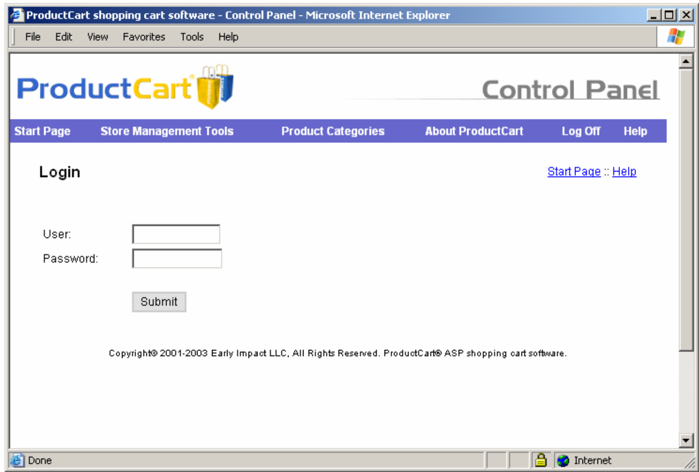
http://www.yourstore.com/productcart/pcadmin/menu.asp

…where "www.yourstore.com" is the domain name of your Web site. This assumes that you have placed the *productcart* folder in the root directory of your Web site. Otherwise, edit the path accordingly. The browser will display the window shown below. In addition, this URL assumes that you have not renamed the "pcadmin" folder: for security reasons, we encourage you to rename the "pcadmin" folder as indicated in Appendix G.

The first time you attempt to log into the Control Panel using a computer from which you have not logged into the Control Panel before, you will be asked to agree to the ProductCart End User License Agreement, which sets the terms and conditions of use of this software. This is the same Agreement contained in Chapter 1 of this document.

You will not see the license agreement again, unless you wish to access the Control Panel from a different computer. The reason why you are asked to agree to the End User License Agreement again when using a different computer is that we assume that it is a new user that is accessing the Control Panel.

Make sure cookies are enabled in your browser or otherwise the same page will keep refreshing as ProductCart will not be able to know whether or not you have agreed to the terms.



ProductCart's Control Panel allows you to manage virtually every aspect of your online store via a user friendly, browser-based interface For information about which browsers are compatible with the Control Panel, please see the System Requirements section of this User Guide.

When you are using the Control Panel, you are actually modifying in real-time how your store operates. All settings configured in the Control Panel are immediately reflected on your store (e.g. adding a new product, changing a price, etc.).

There are ways, however, to add content to your database without having it immediately available on your storefront. For instance, you can add a new product to the store, but keep it inactive until you are ready to sell it. For more information, see *Manage Products*. You can also turn your store off temporarily while doing major maintenance (e.g. setting up new shipping options).

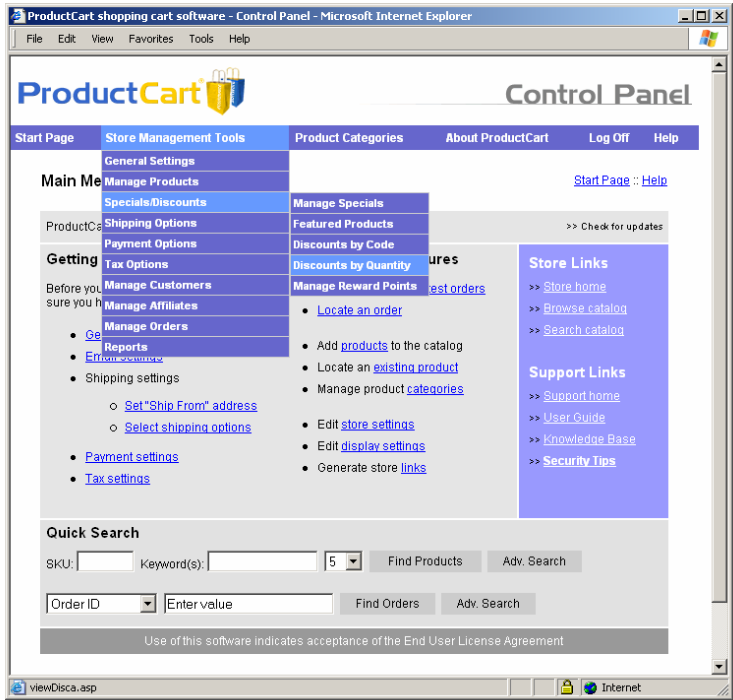
To log in, enter your User ID and your new password and click on the *Submit* button. You will be logged in and the Control Panel's start page will be displayed.

- To navigate to a specific area of the Control Panel, select *Store Management Tools,* then use the menus and submenus that will appear.

- To navigate to a specific product category in your store (once categories have been added to the store database), select *Product Categories*, and then click on *Show Categories*. When you activate this feature, ProductCart will use a version of the Control Panel navigation bar that dynamically loads your store categories in the *Product Categories* menu. Please keep in mind that if you have a large number of categories and subcategories in your store, this could have an impact on the speed at which Control Panel pages are loaded (it has no effect on the storefront). If you notice a decrease in page loading speed, simply turn this feature off by click on *Hide Categories.*

  The top-level categories will be shown. Their subcategories will appear as you mouse over a top-level category. Select *Manage Categories* to view a list of all the product categories that have been added to the store catalog.

- For technical support links, click on the *Help* button located at the top-right corner of the navigation bar. To return to the Control Panel welcome page, click on *Start Page* in the top-left corner of the navigation bar.



The Control Panel's start page contains a series of frequently used links, together with search fields that will allow you to quickly locate products and orders in your store catalog.

The first steps that you need to take to start using ProductCart are listed under *Getting Started* in the left section of the start page. So let's first take a quick look at what needs to be done to get your store up and running.

Setting Up Your Store

Follow the steps outlined below to quickly configure your store. Refer to the chapters mentioned in each paragraph for more details on each step. From the start, you can see how your changes are reflected in the storefront: ProductCart comes with a default storefront interface that you can replace with your own at any time. This is also discussed in details in the next sections.

- **Configure general store settings**. The first thing that you will have to do is to configure some general settings for your online store. On the navigation bar located on the left side of the Control Panel, click on *General Settings* and then *Store Settings*. For details about configuring *General Settings* for your store, see Chapter 3.
- **Add products to your catalog**. Next, you can start adding products to your store catalog. Before you can add a product to your store, you need to create at least one category to assign the product to. To do this, select *Manage Products* from the navigation menu, then click on *Manage Categories* and add a new category. Once the category has been added successfully, select *Manage Products* and then either *Product Wizard* or *Add New Product* to add your first product to the store. The Product Wizard takes you step by step through the process of adding a product to your store, so it's a perfect tool when you are just getting started with ProductCart. How to add a new product to your online catalog is the subject of the Chapter 4 of this guide.

- **Add shipping options**. After adding products, you will probably want to specify which shipping options you are going to make available to your customers. To do this, select *Shipping Options* from the navigation menu, and then click on *Shipping Settings* to enter the address of the location from which orders will be shipped. Select *Configure Providers* to add a variety of shipping options to your store. Refer to the chapter of this document dedicated to *Shipping Options* for more information on this feature.
- **Add payment options**. Then, specify how customers will pay for their orders by adding payment options to your store. Select *Payment Options* from the navigation menu, and then click on *Add New Option*. There are two main types of payment options: real time and non-real time (also referred to as on-line and off-line payment options). In the first scenario, the payment is processed immediately, which is how credit card transactions are often handled on the Internet. In the second scenario, the payment is collected after the transaction. Setting up a real time payment option requires that you have an account with a payment processing company. Read the *Payment Options* section of this guide for details.

  Note: You need to add at least one payment option to your store before you can register and check out. If you attempt to register or place a test order when no payment options have been set, you will receive an error message.

- **Add tax options**. Don't forget to collect sales taxes. Consult your local tax authority for more details about tax laws that you need to adhere to. Chapter 8 talks about ProductCart's tax module in more detail.
- **Integrate your store with the rest of your Web site**. With ProductCart it's easy to seamlessly integrate your store pages with the rest of your Web site. The next section of this manual covers this topic in detail. In addition to merging the graphical interface, you will also want to include in your navigation bar links to dynamic pages generated by ProductCart (e.g. a link to the search page). Use the *Generate Links* feature of ProductCart to create the HTML links that you can use for this purpose. Users of Macromedia Dreamweaver® can also take advantage of the ProductCart Dreamweaver Extension, which can be freely downloaded as indicated in Appendix B.

You're done! Customers will now be able to come to your online store and start purchasing products from you. ProductCart has many other features that you can configure at any time: various types of discounts, promotions, affiliate Web sites, and much more. This User Guide will describe in detail every one of them.

ProductCart's Default Storefront

ProductCart allows you to create a completely customized design for your store. You can either integrate ProductCart with the design that you are already using on your Web site, or create a completely new one. There are virtually no limitation is doing so. Your store will merge seamlessly with the design that you will choose for it.

You can decide to work on a personalized graphical interface for your store at any time. Some ProductCart customers prefer to first add products and categories to their store catalog, using the default graphical interface provided with ProductCart for testing the storefront, and switching to a customized design for their store at a later time. If you would to do so, you can skip the next few sections of this User Guide and go directly to Chapter 3, General Settings.

Other ProductCart users like to work on the store design first, and then focus on building the store catalog and configuring the store settings. If that's what you would like to do, then keep on reading.

ProductCart uses two files, called header.asp and footer.asp, to dynamically build a graphical interface around the shopping cart pages that it creates. For instance, when you load a category page, the software "pulls in" these two files to wrap your Web store design around the page. Both files are located in the "pc" folder.

When you first install and activate ProductCart, if you go to your storefront, you will see the default graphical interface. You will very likely not use these files for your own store, but rather create a custom interface based on your Web site's design. To do so, follow the instructions listed in the next section of this document, called Customizing Your Store's Graphical Interface. Integrating ProductCart with your own store design is easy and fast.

However, the default graphical interface that comes with ProductCart includes some useful features that you may want to transfer over to your own, personalized version of header.asp and footer.asp. You can do so by copying and pasting code from the default version of header.asp to your custom version of the file, or by downloading code "snippets" from the ProductCart Developer's Corner.

Performing these tasks does require a basic knowledge of HTML and an HTML editor. If you need help with designing a custom interface for your store, we encourage you to contact a ProductCart reseller. You can find a list on the Early Impact Web site at the following URL:

http://www.earlyimpact.com/partners.asp

Some of the features included in the default header.asp file are:

- **Small search box**.
  A popular feature among ProductCart users is the "search box". This is a code snippet can be placed virtually anywhere on your Web site (not just dynamic pages created by ProductCart) to allow a visitor to perform a search in your store catalog. You will see the code commented in the default version of header.asp or you can download it from the ProductCart Developer's Corner at the following URL:

  http://www.earlyimpact.com/productcart/support/developers.asp#snippets

- **Dynamic category navigation**.
  You can use this code to dynamically load your product categories in your store's navigation area. You will see the code commented in the default version of header.asp. For more information on how to add dynamic category navigation to your Web store, please download the corresponding script from the ProductCart's developer's corner.

  http://www.earlyimpact.com/productcart/support/developers.asp#snippets

- **Shopping cart content**.
  Another feature shown on the default version of header.asp and popular with many ProductCart users is a small box that shows a snapshot of the order total on every page of the store, so that the customer doesn't have to go back to the shopping cart page to view

the order total and begin the checkout process. You will see the code commented in the default version of header.asp. For more information on how to add this feature to your Web store, please download the corresponding script from the ProductCart's developer's corner.

http://www.earlyimpact.com/productcart/support/developers.asp#snippets

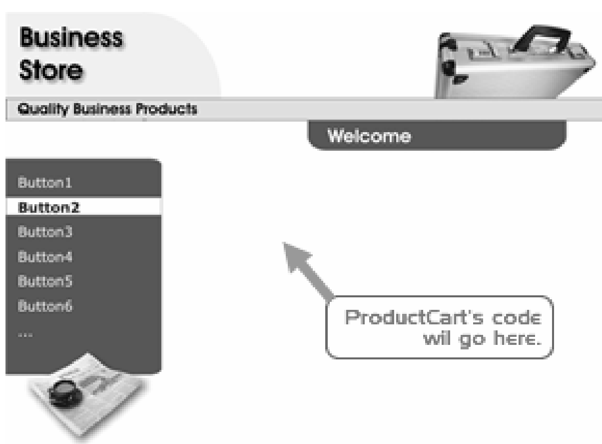
Customizing Your Store's Graphical Interface

Many e-commerce applications limit your ability to customize the look & feel of your online store, therefore preventing you from blending store pages with the rest of your Web site. ProductCart doesn't.

ProductCart allows you to build an online store that will merge seamlessly with your Web site. In other words, you can use any graphical interface that you would like. If you already have a Web site, it will be a snap for you to make all shopping cart pages blend with the rest of the site. If you don't have a Web site yet, you can be as creative as you'd like. ProductCart does not limit you in any way.

For real examples of how seamlessly ProductCart integrates with any graphical interface, take a look at some of the stores powered by ProductCart. You can find a partial list at the following URL: http://www.earlyimpact.com/productcart/stores.asp

The following paragraphs explain how to integrate your Web site's design with the pages generated dynamically by ProductCart. A basic understanding of HTML is recommended.



First Step: create a template.

A template is typically a Web page that contains the main graphic and navigation elements that make up a Web site's interface. Creating a template is a very simple thing to do.

- First, launch your favorite HTML editor (e.g. Microsoft® FrontPage, Macromedia® DreamWeaver, Adobe® GoLive, etc.) and open any page that is part of your current Web site (or create a new page).

- Next, remove all the content that is specific to that page only. For example, your "about.html" page will likely contain some text that describes your business. Remove that text, but keep navigation and other graphic elements that are repeated on other pages.
- Save the file with a different name (e.g. template.html) and you've got yourself a template.

For example, the blank Web page shown below features a few graphic elements at the top, and a navigation menu on the left side. The page content would typically go in the white area in the center of the window, where we placed the "ProductCart's code will go here" message.

Second Step: save the template to the right location.

Save your template page to the *pc* subfolder. If you are using an HTML editor that recalculates the links for you automatically when you save a file to a different subfolder (e.g. Macromedia Dreamweaver® or Microsoft FrontPage®), then you don't have to worry about broken links. Just make sure to save the file to the right location.

If your HTML editor does not automatically recalculate links, you have two options:

- Change all the links and image locations from relative (e.g. images/myimage.gif) to absolute (http://www.mysite.com/images/myimage.gif). This ensures that none of the links will be broken, regardless of the directory or subdirectory where the page may be located.
- Edit links and paths to image files according to the location of the page. For example, if your template's images are in the *images* subfolder located in the root directory of your Web site, and if the *productcart* folder is also located in the root, the path to those images would be "../../images/myimage.gif".

> **Note to Macromedia Dreamweaver® Users**: When we say *template* we are not referring to a Dreamweaver template (*.dwt files). However, if you created a Dreamweaver template for your Web site, you can certainly use it here too. Just follow these simple steps:
>
> (1) Create a new page based on the Dreamweaver template that you created.
> (2) Save the page to the *productcart/pc* folder in your Web site. This way Dreamweaver will automatically recalculate all the links for you.
> (3) Detach the page from the template by selecting "Modify/Templates/Detach from Template". This page will no longer be controlled by your Dreamweaver template. However this is a necessary step to remove the extra code that Dreamweaver adds to the file's source code.
> (4) Save the file and continue with the steps outlined below.

Third Step: add the ASP code.

Next, add the following code to your template. Place the following code right after the <html><head> tags at the very top of the page code.

```
<%Response.Buffer=True%>
<%
Set conlayout=Server.CreateObject("ADODB.Connection")
```

```
conlayout.Open scDSN
Set RSlayout = conlayout.Execute("Select * From layout Where layout.ID=2")
Set rsIconObj = conlayout.Execute("Select * From icons WHERE id=1")
%>
```

Place the following code right after the </html> tag at the very bottom of the page code.

```
<%
conlayout.Close
Set conlayout=nothing
Set Rslayout = nothing
Set rsIconObj = nothing
%>
```

Note: If there are extra lines or other characters, the code may not work. Sometimes pasting from Word directly into your HTML editor can create problems due to unwanted code being added to the original text. To avoid this scenario, a solution is to first paste the code into an empty Notepad file, proof it by comparing it to the above, then copy and paste it into the HTML document.

Fourth Step: create "header.asp" and "footer.asp".

Place your mouse cursor at the beginning of the section where the page content should appear. If you are using an HTML editor such as Macromedia® Dreamweaver or Microsoft® FrontPage, you can do this in the design view by positioning the cursor at the center of the table cell that is going to contain the page content.

Now switch to the HTML view to display the code. Copy all the code from that point to the beginning of the page, paste it into a new Notepad file, and save it as "**header.asp**". Go back to the template file and now copy all the code from that point to the end of the document, paste it into a new Notepad file, and save it as "**footer.asp**".

Your copy of ProductCart ships with default *header.asp* and *footer.asp* files. Use these files as a point of reference if the paragraphs above were not clear to you.

An Example

Let's look at a basic example of how this process works. The sample page that we are using for this example is an extremely simple HTML page that organizes its content in a table cell. The code for the page, our "template page", would look like this:

```
<html>
 <head>
  <title>My Template</title>
 </head>
 <body>
  <table>
   <tr>
    <td>
    This is my template
    </td>
```

```
    </tr>
   </table>
  </body>
</html>
```

In this basic example, the code for *header.asp* would look like this:

```
<html>
 <head>
 <%Response.Buffer=True%>
 <%
 Set conlayout=Server.CreateObject("ADODB.Connection")
 conlayout.Open scDSN
 Set Rslayout = conlayout.Execute("Select * From layout Where layout.ID=2")
 Set rsIconObj = conlayout.Execute("Select * From icons WHERE id=1")
 %>
 <title>My store's graphical interface</title>
 </head>
 <body>
 <table>
   <tr>
    <td>
```

Note how the code in *header.asp* stops with the opening tag for the table cell that in our template page contained the copy "This is my template". We removed that text because we don't want it to show on the store. The code for *footer.asp* starts with the closing tag for the same table cell:

```
     </td>
    </tr>
   </table>
  </body>
</html>
<%
conlayout.Close
Set conlayout=nothing
Set Rslayout = nothing
Set rsIconObj = nothing
%>
```

Fifth Step: upload the files.

Upload both files to the *productcart/pc/* folder on your Web server. You will see that sample files are already located in that folder. Rename the sample files before you upload your files to the server if you would like to keep them as a backup.

> **Note**: Do NOT use *header.asp* and *footer.asp* for other ASP pages. They will only work with shopping cart pages. If used with other content, they will generate errors. If you want to use the same files for other purposes (e.g. as the interface for another ASP application or other sections of your Web site), make sure you remove the ASP code added in *Step 3* above.

Making Your Store More Search Engine Friendly

You can further customize the file *header.asp* discussed in the previous section of this chapter to include simple ASP code that will generate page-specific meta tags for your store. Meta tags are a portion of a HTML page that is invisible when the page is viewed through a browser, but is used by search engine robots to classify and rank the web page according to their search algorithms. The most common and most important meta tags are "title", "description", and "keywords".

ProductCart features code that can automatically generate these three meta tags: different meta tags are generated depending on the page that is loaded. For example, ProductCart will use the category name for the "title" meta tag of the page that is shown when customers browse to that category. Similarly, ProductCart will use a portion of the product description to create the "description" meta tag for the page that is shown when customers view details for a certain product on your store.

By using meta tags that are specific to the content shown on the page, you will make your store more search engine friendly.

It is up to you whether to use this feature or not.

- You can include the "title", "description", and "keywords" meta tags in the HEAD section of your *header.asp* file. These meta tags will be used for any page dynamically generated by the shopping cart. For example, the page title will not change when different product details pages are shown.
- You can remove the "title", "description", and "keywords" meta tags from *header.asp* and instead follow the instructions listed below to have ProductCart dynamically create different meta tags for different shopping cart pages. For example, the page title for different categories and product pages will change based on the name of each category and product shown.

To use this feature, follow these simple instructions:

- Make sure the file *include-metatags.asp* is located in the *pc* folder of your store. If you don't see the file there, please contact Early Impact by submitting a support request using the form located on the ProductCart Support Center and we will be happy to send it to you. Mention in your message that your version of ProductCart is missing the *include-metatags.asp* file.
- Open the file *header.asp* using Notepad or an HTML editor and place the following code above all other code:

```
<!--#include file="include-metatags.asp"-->
```

- Place the following code immediately after the opening <HEAD> tag:

```
<% GenerateMetaTags() %>
```

- Save *header.asp* and upload it to your Web server.

For example, the code for *header.asp* used for the example included in the previous section of this document would be altered as follows:

Original *header.asp* code:

```
<html>
 <head>
 <% Response.Buffer=True %>
 <%
 Set conlayout=Server.CreateObject("ADODB.Connection")
 conlayout.Open scDSN
 Set Rslayout = conlayout.Execute("Select * From layout Where layout.ID=2")
 Set rsIconObj = conlayout.Execute("Select * From icons WHERE id=1")
 %>
 <title>My store's graphical interface</title>
 </head>
 <body>
 <table>
   <tr>
    <td>
```

Edited *header.asp* code (note the removal of the "title" and the addition of the new code, in blue):

```
<!--#include file="include-metatags.asp"-->
<html>
 <head>
 <% GenerateMetaTags() %>
 <% Response.Buffer=True %>
 <%
 Set conlayout=Server.CreateObject("ADODB.Connection")
 conlayout.Open scDSN
 Set Rslayout = conlayout.Execute("Select * From layout Where layout.ID=2")
 Set rsIconObj = conlayout.Execute("Select * From icons WHERE id=1")
 %>
 </head>
 <body>
 <table>
   <tr>
    <td>
```

- Now open the file *include-metatags.asp* using Notepad or an HTML editor. Save a backup copy of the file before editing it so that you can revert to the original version if your edited version creates any problems on your storefront.

  Locate the following code in the file, and edit it as described. In this User Guide, we have highlighted in blue the areas of *include-metatags.asp* that you need to edit.

```
' ***********************************************************************************
' Edit the content for the following constants
' ***********************************************************************************

' The following is used as the page title when the page that is being loaded is not
' a product or category page. If it is a product or category page, the page title is
' the product name and category name respectively. Replace the ProductCart title
' shown below with your own.
```

```
Const DefaultTitle = "ProductCart shopping cart software"

' The following is used as the "Content" for the default "Keywords" meta tag. When the
' page is a product or category page, the product or category names are also added to
' the keywords. Replace the following keywords with your own.
Const DefaultKeywords = "shopping cart software, ecommerce software, asp shopping cart, shopping carts, ecommerce solutions, e-commerce, ProductCart, Early Impact"

' The following is used as the "Content" for the default "Description" meta tag. When the
' page is a product or category page, the product or category descriptions replace the
' default category description.
Const DefaultDescription = "We offer shopping cart software to run ecommerce stores. Our shopping carts are used by businesses to build and manage an online storefront."

' ********************************************************************************
' You should not need to edit the code after this point
' ********************************************************************************
```

- As the code indicates, you should not need to edit any other area of the file. If you are an advanced user, you can choose to edit other sections of the file to further customize the type and number of meta tags dynamically generated by ProductCart.
- Save the edited version of *include-metatags.asp* and upload it to your server. Browse the store and pay attention to the page title shown by your browser to see if it properly changes as you browse your store catalog. If you are using Internet Explorer, select *Source* from the *View* menu to view the source code for the page. You can then see exactly what meta tags ProductCart generated for the page.
- Search engines behave differently when it comes to spidering dynamic pages such as the ones created by ProductCart. To increase the likelihood that a dynamic page is spidered by a search engine, it is always recommended that you link to that page from a static, HTML page. Here are a few tips:
    - Link to dynamic pages from static pages. As mentioned earlier in this chapter, the likelihood that a dynamic page will be spidered and indexed is much greater when there are one or more static pages that link to it. (e.g. a static home page, a site map, a store map, content pages, etc.).
    - Create a static home page for your store (e.g. www.myStore.com/index.html), then link to selected dynamic pages from it. For example, you could link to the featured products page (pc/mainIndex.asp), the top level category page (pc/viewCat.asp), selected product and category pages, etc. You can use the Control Panel to generate links to these pages, then copy and paste them into your static HTML pages. If you would rather use a dynamic home page (e.g. you want to show the 'featured products' you have set in the Control Panel), move ProductCart's default home page (mainIndex.asp) to the root directory of your Web site, as described in Appendix A..
    - Create a static site map (e.g. www.myStore.com/sitemap.html), then link to selected dynamic pages from it. Search engines typically like finding a site map on a Web site. Make sure to link to the site map from your home page.

- ProductCart v2.6 and above include a feature that will help you generate static store maps. Using this feature you can create one or more static pages that link to dynamic product and category pages.
- Create content rich pages, and then link to dynamic category and product pages from it. For instance, assume you are selling custom computers. You could create a page that talks about the difference types of computers you are selling and includes tips for your customers on which model they should choose depending on their needs. This page (e.g. how_to_choose_a_computer.html) would then link to various category and product pages created by ProductCart. Make these pages informative and simply laid out (few images, lots of text). Link to them from your site map.
- If you want to take your HTML pages to the next level in terms of search engine optimization, look for a reputable SEO company (here is a list http://www.sempo.org/sempo-membership-directory.php). Disregard any offer from any company that claims to be able to guarantee high rankings on any of the major search engines: there is absolutely no way to "guarantee" rankings, other than purchasing them via Pay-per-click or other paid-for placement programs, when available.

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Chapter

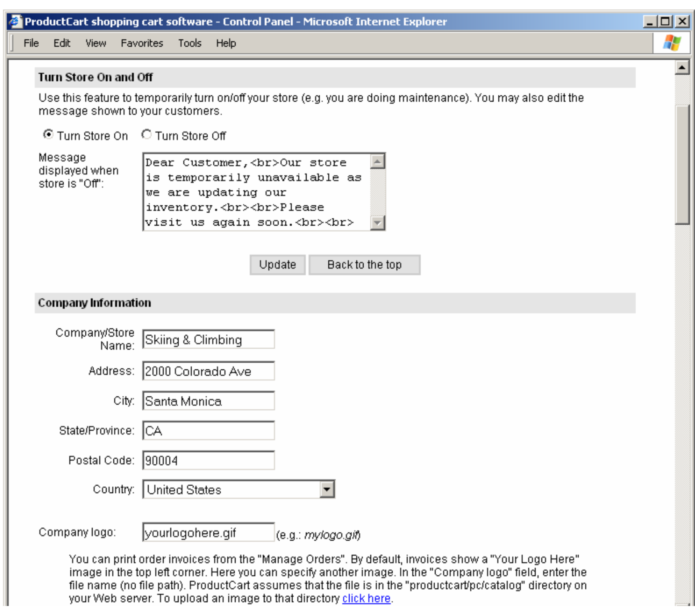
3

General Settings

The *General Settings* menu allows you to configure general store settings such as the type of font and colors used on your storefront, the number of products displayed on each page, the body of the e-mail message sent to your customers after they place an order, the buttons and icons used throughout your store, and many others. This is also the place to go for automatically generating links that you can place on your existing Web site to link it to your new ProductCart store. See the *Generate Links* section for more information on this feature.

Store Settings

The *Store Settings* page is where you enter general information about your store and configure some very important storewide properties. This is the first page that you should visit after you have activated your copy of ProductCart. To view this page, select *Store Settings* from the *General Settings* menu.



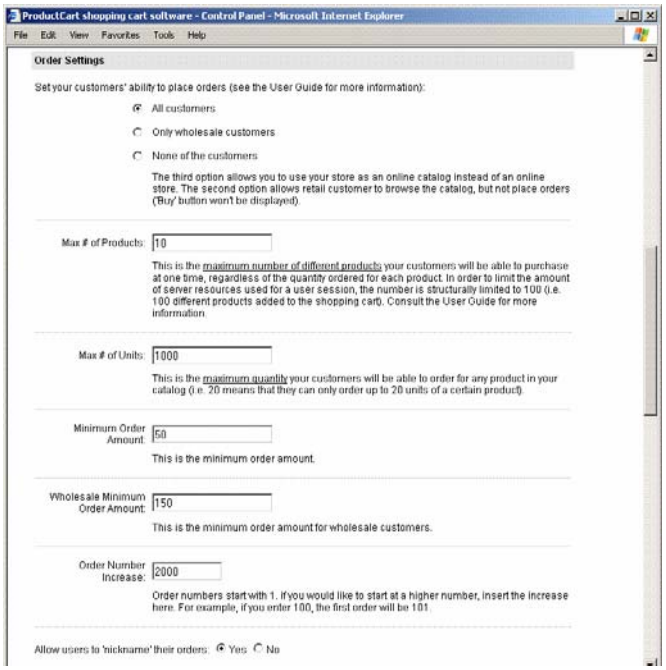
- **Turn Store On/Off**. There may be times when you need to temporarily turn your entire store off for maintenance. For example, it is a good idea to turn a store off if you need to download/upload the store database. To turn your store off, check the *Turn Store Off* option and click on the *Update* button. When the page refreshes, a *Turn Store On* option will now be visible. Check that option and click on *Update* to turn your store back on. When you turn your store off, any store page will be replaced by a message to your customers. You can edit the message by changing the text in the *Message Displayed* field. You can use HTML tags in the text field.

- **Company Information**: Company or store name and address appear on many shopping cart pages and on most e-mail messages sent to customers. Make sure that you correctly type the domain name (URL) of the Web site where the store is located because that is the address that ProductCart will use for the *Generate Links* feature. Your address will also appear on order invoices and other documents automatically formatted by the shopping cart. This address is NOT used by the shipping component when calculating shipping rates: to set the address from which orders are shipped, select *Shipping Settings* from the *Shipping Options* menu. The rationale behind this feature is that companies have an office address that is often different from the address of the warehouse from where products are shipped. When using dynamic shipping providers (e.g. UPS or FedEx) this allows for more accurate shipping rates.
- **Company Logo**: Here you may specify the name of the image file that will be used on the page that displays a printer-friendly version of a customer's order details, printer-friendly version of a saved quote (*Build To Order only*), store invoices, and more. The default image is called *yourlogohere.gif*. ProductCart allows you to print order invoices under *Manage Orders*. By default, invoices show a "Your Logo Here" image in the top left corner. Here you can specify another file. Make sure the file is 100 x 100 pixels or smaller. To upload this image you can use the *Upload Image* feature of the Control Panel, located under the *Manage Products* menu, or transfer the file via FTP to the "productcart/pc/catalog" subfolder on your Web server.
- **Order Settings**: These settings affect whether or not products can be bought from your Web catalog and what the requirements for customers' orders should be. The first three settings have to do with store-wide ordering restrictions, which allow you to use your store as an online catalog instead of an online store. For example, if you select 'Only wholesale customers', retail customers will be able to browse the catalog, but not place orders ('Buy' or 'Add to Cart' buttons won't be displayed).

    - <u>All customers</u>. When you select this option, anybody that visits your store will be able to place an order.

    - <u>Wholesale customers only</u>. When you select this option, only wholesale customers will be able to purchase. Retail customers will be able to browse the catalog, but will not be shown a "Buy" button on any product details page. As only the store administrator can change a customer's status from retail to wholesale, this feature allows you to review and approve who can place an order. Some businesses prefer not to fulfill retail orders directly, which is the reason why this feature was added to ProductCart.

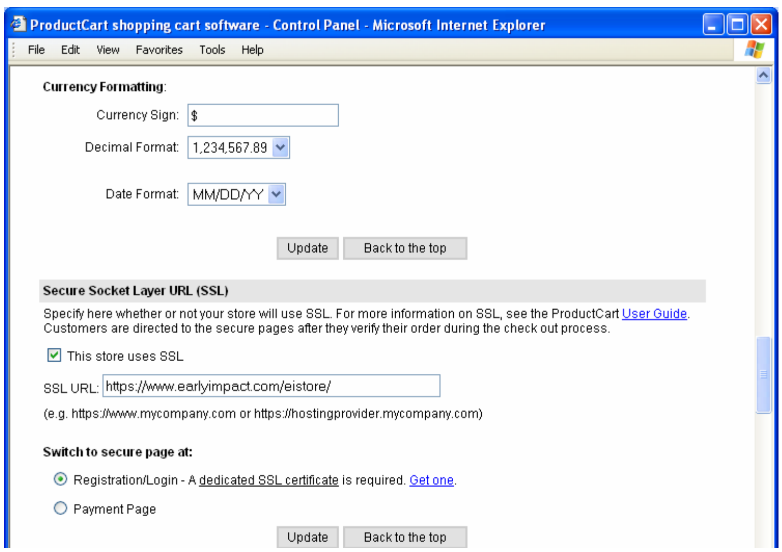
    - <u>None of the customers</u>. This feature allows you to use your store exclusively as an online catalog where customers can view product information, but not place orders. Companies that are gradually moving their business online appreciate this feature as it allows them to transform their catalog into a full-featured ecommerce store with just one click. Note that ProductCart also allows you to set individual products as “Not for Sale”. Learn more about that feature in Chapter 4.



- The following four settings define requirements that an order has to meet for the store to process it. In all four cases, customers whose shopping cart contents don’t meet one or more of these criteria are notified of the problem during the check out process.
  - The Maximum Number of Items is the largest number of separate items your customers will be able to add to their shopping cart and purchase at one time, regardless of the quantity ordered for each product (i.e. 20 units of one product is equal to one cart item). For technical reasons, this number is structurally limited to 100[2].
  - The Maximum Number of Units is the largest quantity your customers will be able to order for one product (i.e. 20 means that they can only order up to 20 units of a certain product).
  - The Minimum Order Amount is the minimum dollar value of the products added to the shopping cart for your store to accept the order. Orders below the minimum are considered too small and will not be processed. You can set separate minimum levels for retail and wholesale customers (see below).
  - The Minimum Wholesale Order Amount is the minimum dollar value of the products added to the shopping cart by your wholesale customers. Orders below the minimum are considered too small and will not be processed.

[2] The reason why there is a structural limitation to this number is that server resources are reserved by the array that holds the shopping cart content. In the code, you will see instances of this array as follows: pcCartArray(100,30). You may edit this array to increase the structural limit. We are also investigating better ways to handle server resources, such as dynamically increasing the array. Please contact our support staff for more information.

    - <u>Order Number Increase</u>. Order numbers start with 1. If you would like to start at a higher number, insert the increase amount in this field. For example, if you enter 100, the first order will be 101. Once this setting has been configured, it should not be changed as it could create customer service issues (e.g. difference between order numbers appearing in the store, and order numbers previously communicated to store customers via email confirmations, etc.).
    - <u>Allow users to nickname their orders</u>. ProductCart v2.6 and above include a feature that allows your customers to "nickname" an order during the checkout process. Customers can also name an order, or edit an order's name, when viewing information about a previous order from their account area. This feature is useful for stores where customers tend to place a large number of orders and want to be able to quickly locate a previous order. By default, this feature is turned off. To enable it, select *Yes* and update the store settings page.



- o The remaining order settings have to do with the currency & date format used throughout the store. Specifically:
    - <u>Currency sign</u>: Sets the currency symbol displayed on the store. For example: $, €, EUR, etc.
    - <u>Decimal format</u>: Sets the decimal format to either the English (1,234,567.89) or Metric (1.234.567,89) standard.
    - <u>Date format</u>: Sets the date format to either the DD/MM/YY or MM/DD/YY standard, where D stands for day, M for month and Y for year.
- o **Secure Socket Layer URL (SSL)**. If you use SSL on your online store, check the *This Store Uses SSL* option, enter the URL where secure pages are hosted on your Web server, and click on the *Update* button. You may use both a dedicated SSL certificate (issued specifically for your domain name), or a shared SSL certificate, provided to you by your Web hosting company. If the first scenario, the URL contains your domain name (e.g. https://www.mycompany.com). Is the second scenario, it typically contains your Web

hosting account number (e.g. https://server.mycompany.com), but the exact address changes from one Web hosting provider to another. Check with your Web hosting provider to obtain this information[3]. NOTE: you will not be able to use a shared SSL certificate if you are using the Parent Path Disabled version of ProductCart or if the Secure Certificate is located on a different server than your Web site.

Many online stores use SSL technology[4] to securely collect confidential information from their customers, such as their credit card details. If you plan to collect credit card information on your ProductCart store, you should definitely consider using this technology. Your customers will want to know that the security and privacy of their personal information is safeguarded when placing orders on your store[5].

You can instruct ProductCart to switch to SSL:

- At login/checkout. Check this option if you want the store to switch to the Secure Socket Layer when customers begin the registration or checkout process. For technical reasons, this option requires that you are using a dedicated SSL certificate. Do not check this option if you are using a shared SSL certificate or the shopping cart will show an error during checkout indicating that the shopping cart is empty.
- On the payment page. Check this option to have ProductCart switch to SSL before the customer enters payment information. You must select this option if you are using a shared SSL certificate.

Just as a reference, here is a short list of companies that issue SSL certificates (prices vary significantly as they include difference services, especially different levels of insurance). Contact these and other SSL certificate providers for more information. Early Impact is not affiliated with any of them.

- DigiCert - http://www.digicert.com/
- GeoTrust - http://www.geotrust.com/web_security/index.htm
- Instant SSL - http://www.instantssl.com
- Thawte - http://www.thawte.com/ssl/index.html
- VeriSign - http://www.verisign.com/products/site/secure/index.html

[3] Check with your Web hosting provider about how you can use SSL on your Web site. In some cases, Web hosting companies require that you purchase your own SSL certificate, which is then installed on your server. In other cases, they allow you to use their own "shared" SSL certificate. Note: you cannot use a shared SSL certificate with ProductCart if the server has parent paths disabled (see Chapter 2 for more information about running ProductCart on a server that has parent paths disabled).

[4] SSL (Secure Socket Layer) technology encrypts data exchanged between a server and a browser. When SSL is used, information is exchanged using the HTTPS protocol instead of the HTTP protocol, where data travels unencrypted. The address of a page delivered using the HTTPS protocol will typically become https://www.myserver.com/mypage.html . Because data is encrypted before being sent, the speed of the transmission is lower. This is the reason why not all pages of an online store are delivered using HTTPS, but only the ones that collect or display sensitive information, such as the pages where payment information is collected during the check out process. This is also true with your ProductCart store, which uses SSL during the check out process only for the pages where payment and personal information is entered. If you would like to enforce the use of SSL on other pages, consult the ProductCart Developer's Corner for some information on that topic.

[5] For more information about how credit card information is stored in your store database, please see the *Payment Options* section of this manual.

- **Miscellaneous Settings** – Here you can set the following properties:

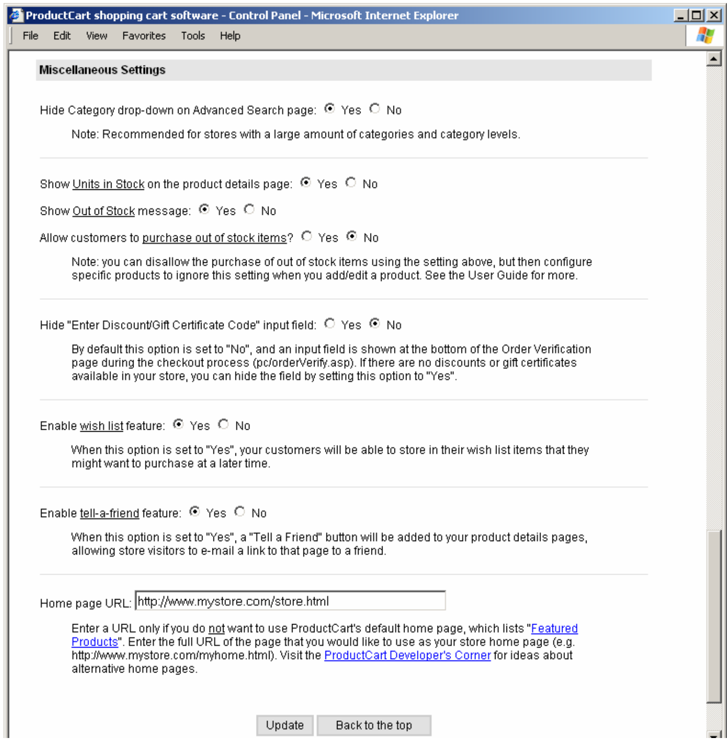
    - Hide Category drop-down on Advanced Search page: On stores with a large amount of categories and category levels, it is recommended that you set this option to *Yes* to improve the speed at which the advanced search page loads in the storefront. If set to *No* (default), the advanced search page included a *Filter by Category* drop-down menu.

    - Show Units in Stock on the product details page. You can decide whether you want your store to display the current stock level on the product details page. The information is displayed at the top of the page, just under the product part number. Note that if you configure a specific product to ignore inventory settings (*Disregard Inventory* setting on the add/edit product page), the number of units in stock is automatically hidden.

    - Show Out of Stock message: Whether you want your store to display an *Out of stock* message for products that are out of stock (quantity is 0 or negative). If a product is out of stock and you have selected the *Show Out of Stock* option, then the product details page on your store will display an "Out of stock" message. You can change this as well as virtually every text string that appears in the storefront by editing the file *includes/languages.asp* as indicated in Appendix C.

    - Allow customers to purchase out of stock items: You can also specify whether you want customers to be able to place an order for out of stock items or not. If this option is set to *Yes*, you can still configure the store to show the *Out of Stock* message on the product details page, but the system won't prevent users from adding the product to their shopping cart.

    - Hide "Enter Discount/Gift Certificate Code" input field: By default this option is set to *No*, and an input field is shown at the bottom of the Order Verification page during the checkout process (pc/orderVerify.asp). If there are no discounts or gift certificates available in your store, you can hide the field by setting this option to *Yes*.



- Enable Wish List feature: Whether or not you want your customers to be able to add products to a personal *Wish List*. The *Wish List* feature of ProductCart allows your customers to place items that they like, but are not ready to buy right at that moment, in an idea basket from which they can retrieve them at any time. The advantage is that when they are ready to order, they don't need to search for those products again. All they have to do is log into their account, select *View Wish List*, and add to the shopping cart any products they previously put on their Wish List.
    - To add a product to their *Wish List*, users will click on the *Add to Wish List* button located on every product details page in your store. If the *Wish List* feature is not active, that button is not displayed.
    - To add products to the *Wish List* visitors must register with your store. Otherwise ProductCart will not remember who they are when they try to retrieve their list.
- Enable Tell A Friend feature: Whether or not you want the ***Tell a Friend*** button to appear on the product details page. This feature allows customers to refer other customers to your Web site. A link to the specific product details page on which the customer had clicked on the *Tell a Friend* button is sent via email, together with any comments the customer decides to enter. Customers must register with your store to be able to use the *Tell a Friend* feature. This ensures that they receive *Reward Points* on the referred customer's purchase, if that feature is enabled. For more information about *Reward Points*, see Chapter 5.
- Home page URL. Leave this field blank if you want to use ProductCart's default home page for your store (pc/mainIndex.asp). The default home page lists up to

twelve *Featured* products, which can be set under *Specials/Discounts > Featured Products*. If you don't want to use that page as your store's home page (e.g. you don't use *featured* items), enter the full URL of the page that you would like to use as your storefront instead of the default. This is also the page that *Continue Shopping* links and buttons point to.

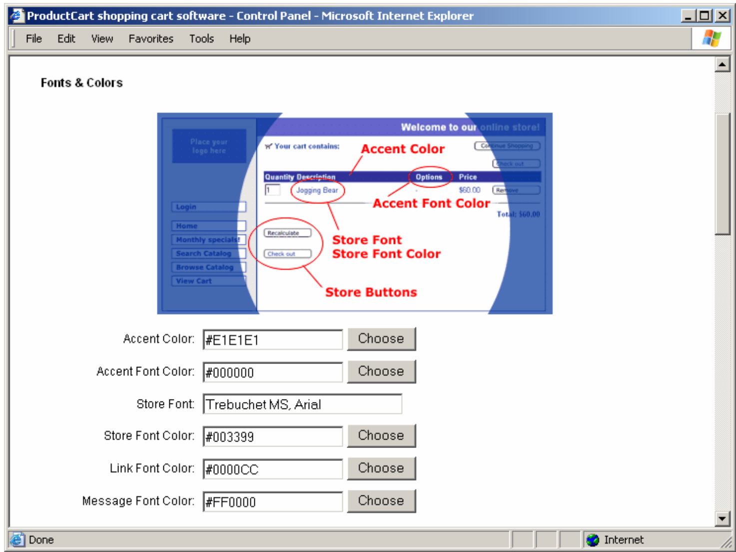
The home page can be a combination of static and dynamic content. If you are familiar with HTML, visit the ProductCart Developer's Corner for ideas on how to create a custom home page for your store. Even if you have never done any ASP programming, you will likely be able to use some of the ASP snippets that are available for download there. There are also a few alternative home page layouts that are ready for you to use.

Display Settings

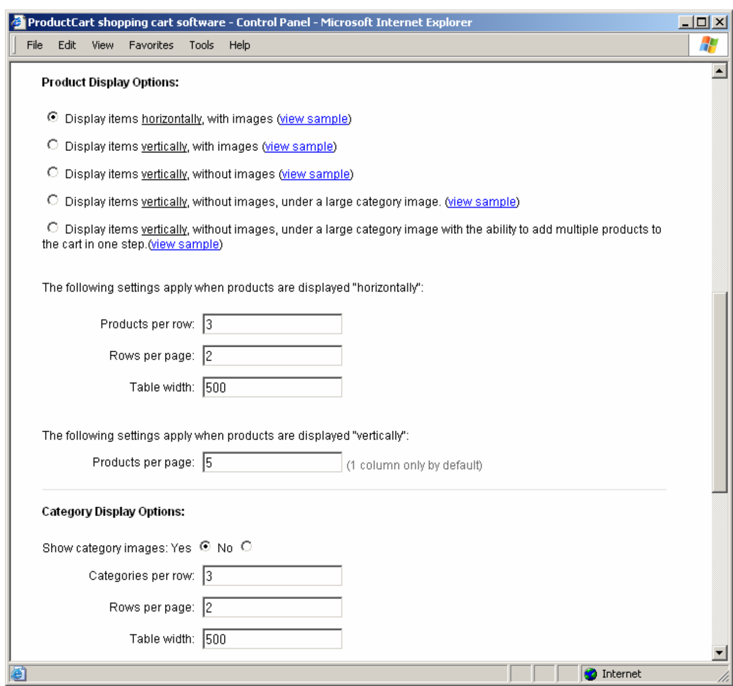
An important part of setting up your store is making it look exactly the way you want. The section entitled *Customizing Your Store's Graphical Interface* addresses the issue of changing the template page surrounding the shopping cart code so that shopping cart pages blend seamlessly with the rest of your Web site. This section talks about changes you can dynamically make to the shopping cart code that affect the way products and categories are displayed when users browse your store.

The *Display Settings* page is organized into two areas, one to edit store font type and colors, and a second one that deals with how products and categories are displayed.

- **Store Fonts and Colors**: This section allows you to define the type & color of the fonts used in the store. It also allows you to edit the color of the background of the title row whenever the shopping cart uses a table to organize the information. The graphic file shown on the page visually explains what the various terms refer to. To modify store buttons, use the *Edit Store Buttons* feature, which is described in the next section.
    - **Accent Color**: Sets the background color for the title row of the table that organizes shopping cart information. Affects pages such as 'View Cart', 'Order Summary', 'View Previous Orders', etc.
    - **Accent Font Color**: Sets the color of the font in that title row.
    - **Store Font Type & Color**: Sets the type and color of the font used everywhere in the store, except for links, title rows (see above) and store messages. Do not enter quotes around the font name. For example: you will enter *Trebuchet MS* and not *"Trebuchet MS"*.
    - **Link Font Color**: Sets the color for links within the store.
    - **Message Font Color**: Sets the color for store messages. This gives you the ability to highlight store messages by using a color different than the general store font color. For example: "This product is currently out of stock."



- **Product & Category Display Options**. This second area of the page allows you to control the way products or services are displayed when store visitors browse your catalog by category. You can decide whether to show information vertically or horizontally, whether to show product and category images or not, how many items to display per page, and more.



There are five ways in which products can be displayed on a page. Whatever setting you choose, it only applies to products, not categories. There are separate settings to control how categories are displayed (see below). The settings also apply to the “Specials” and search pages.

- **Horizontally, with images**. When this option is selected, items are displayed horizontally. The product thumbnail image is displayed too. Short product descriptions are not shown. For best results, make sure that your thumbnail images do not exceed 100 x 100 pixels.
- **Vertically, with images**. When this option is selected, items are displayed vertically, in one column, together with the thumbnail image. When present, the short product description is displayed.
- **Vertically, without images**. When this option is selected, items are displayed vertically, in one column, but this time the thumbnail image is not displayed. When present, the short product description is displayed.
- **Vertically, without images, under a large category image**. When this option is selected, items are displayed vertically, in one column, without product images, but with a large category image at the top of the page. If you opt to use this setting, make sure to specify a large category image when configuring your product categories. Also, to optimize viewing space, this display option does not display elements that other views show: for example, wholesale customers will only see the wholesale price instead of both retail and wholesale price. When present, the short product description is displayed.
- **Vertically, without images, under a large category image, with the ability to add multiple products in one step**. This option lists products similarly to the display option described above, with the difference that the presence of a quantity input filed next to each product allows customers to add multiple products to the shopping cart in one step (all products for which the quantity is other than zero). When present, the short product description is displayed.

Here are some graphical examples of how the various display settings affect the storefront (Note: all screen shots shown in this and other pages were taken using a fictitious store: all names and marks are property of their respective owners).

Products displayed horizontally, with images. In this case the store was set up to show 3 products per row. Note that short product descriptions are not displayed. The product sorting criteria is determined through the Control Panel using either the *Display Settings* page or *Modify Category* page.

Technical note: the pages used by ProductCart are viewCat_h.asp, viewSpc_h.asp, advSrc_h.asp, viewBestSellers_h.asp and viewNewArrivals_h.asp

Products displayed vertically, with images. When present, short product descriptions are displayed. The product sorting criteria is determined through the Control Panel, using either the *Display Settings* page or the *Modify Category* page.

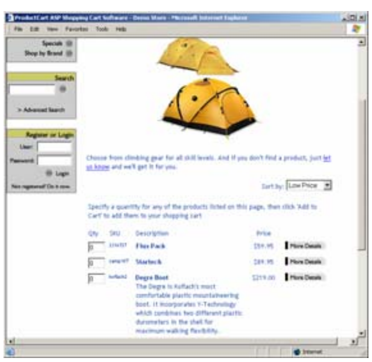
Technical note: the pages used by ProductCart are: viewCat_p.asp, viewSpc_p.asp, advSrc_p.asp, viewBestSellers_p.asp and viewNewArrivals_p.asp

Products displayed vertically, without images. When present, short product descriptions are displayed. The product sorting criteria is determined through the Control Panel, using either the *Display Settings* page or the *Modify Category* page.

Technical note: the pages used by ProductCart are: viewCat_l.asp, viewSpc_l.asp, advSrc_l.asp, viewBestSellers_l.asp and viewNewArrivals_l.asp

Products displayed vertically, without images, under a large category image. When present, short product descriptions are displayed. The product sorting criteria is determined through the Control Panel, using either the *Display Settings* page or the *Modify Category* page.

Technical note: the pages used by ProductCart are: viewCat_i.asp, viewSpc_i.asp, advSrc_i.asp, viewBestSellers_i.asp and viewNewArrivals_i.asp



Products displayed vertically, without images, under a large category image, with quantity fields that allow the purchase of multiple items at once. When present, short product descriptions are displayed. The product sorting criteria is determined through the Control Panel, using either the *Display Settings* page or the *Modify Category* page.

Technical note: the pages used by ProductCart are: viewCat_m.asp, viewSpc_m.asp, advSrc_m.asp, viewBestSellers_m.asp and viewNewArrivals_m.asp

If you are using the display option that allows you to add multiple products to the shopping cart at once ("_m.asp" pages), you may notice that the quantity field is hidden in some cases, and shown in other cases. This is because of the following default system behaviors (some of the features and settings listed below are covered in other areas of this User Guide):

- The quantity field is not shown when the product is out of stock (any product type), unless the *Disregard Stock* option for that product has been checked (standard products only), or the storewide setting *Allow purchase of out of stock items* is set to "Yes".
- The quantity field is not shown when a standard product has been assigned options, regardless of stock settings. This is because the customer needs to view and select product options before adding the product to the cart.
- The quantity field is not shown when the product is a Build To Order product, regardless of any other setting.
- The *Add to Cart* button is not shown when all products on the page belong to any of the categories mentioned above.
- The quantity field and *Add to Cart* button are hidden to retail customers if the store has been set up to only allow wholesale customers to shop.
- The quantity field and *Add to Cart* button are hidden to all customers if the store has been set up to only work as a catalog.

If you change product display settings, in order to view the store under the new settings you will need to go back to the first catalog page (*pc/viewCat.asp*) and start browsing the store again from there. If you simply refresh the catalog page that you are currently viewing, you will not be able to see any changes. That's because ProductCart uses different ASP pages to display the products under the different display settings (see technical notes above).

If you are displaying products **horizontally**, you can then use a combination of the following settings to further control the way they are displayed:

- ***Products per Row*** – This variable defines how many products will be shown on each row.
- ***Rows per Page*** – This variable defines how many rows of products should be displayed on each page. By using these two variables together, you can specify the exact number of products that will be shown on each catalog page.
- ***Table Width*** – This variable defines the width of the HTML table that organizes products in your catalog pages. You may need to edit its size to correctly display the number of products that you just defined.

If a category contains more products than the total number of products per page resulting from these two settings, then ProductCart automatically adds a navigation area at the bottom of the page with clickable page numbers, and also adds *Next* and *Previous page* icons that can be edited using the *Edit Store Icons* feature.

If you are displaying products **vertically**, you can specify how many should be displayed on each page. The *Table Width* variable mentioned above also applies to pages where products are vertically organized.

- ***Products per Page*** – This variable defines how many products will be shown on each page when you are displaying them vertically.

The page displaying *Specials* is treated just like any other product page and therefore the number of *Specials* shown on each page follows the settings defined above. You can set products as *Specials* using the *Specials/Discounts* module.

You can also control the way categories are displayed. Categories and subcategories are displayed with or without their category images when visitors browse your catalog (see sample screen shots above).

- ***Show category images*** – This variable defines whether category images will be shown or not.
- ***Categories per Row*** – This variable defines how many categories or subcategories will be shown on each row.
- ***Rows per Page*** – This variable defines how many rows of categories should be displayed on each page. By using these two variables together, you can specify the exact number of categories that will be shown on each catalog page.
- ***Table Width*** – This variable defines the width of the HTML table that organizes categories in your catalog pages. You may need to edit its size to correctly display the number of categories that you just defined.

If a category contains more subcategories than the total number of categories per page resulting from the settings above, then ProductCart automatically adds a navigation area at the bottom of the page with clickable page numbers, and also adds *Next* and *Previous page* icons that can be edited using the *Edit Store Icons* feature.

The category display settings also affect how brands are shown in the *Browse by Brand* page. For more information, see the section about managing brands with ProductCart.

- ***Product sorting method within a category*** – The bottom part of the *Display Settings* page deals with the way products are sorted within a category. For a description of how you can sort products within a category, please refer to the corresponding section of Chapter 4 of this User Guide.

Checkout Options

ProductCart allows the store administrator to use a variety of custom checkout options to add information to the order details. For example, the store may need to know what the customer's tax ID is, or whether a sales representative helped during the purchase process, or on what date and time the order should be delivered.

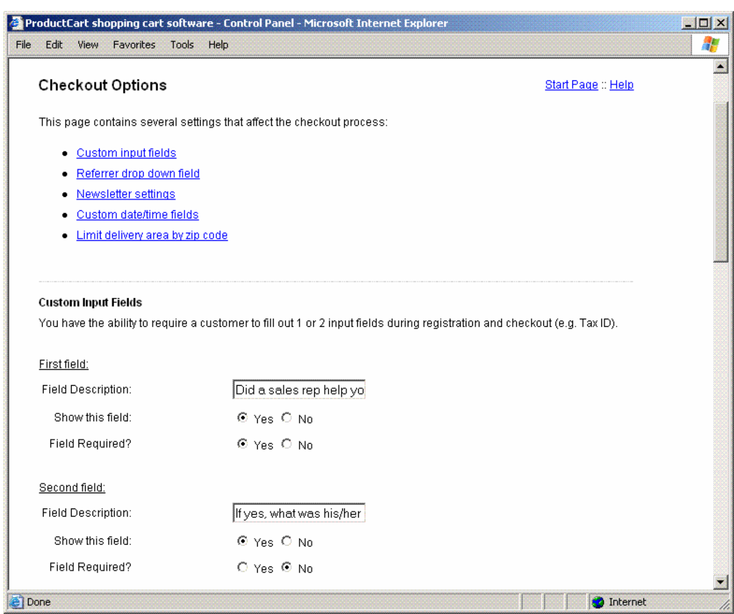
The *Checkout Options* page is divided into the following five sections.

1. Custom checkout fields
2. Referrer drop-down menu
3. Newsletter settings
4. Custom date field
5. Limit delivery area by Zip code

Custom Input Fields. You now have the ability to add up to 2 custom input fields to your store's registration and checkout pages. For example, some stores may require their customers to provide their Tax ID before allowing them to checkout.

Custom input fields have the following characteristics:

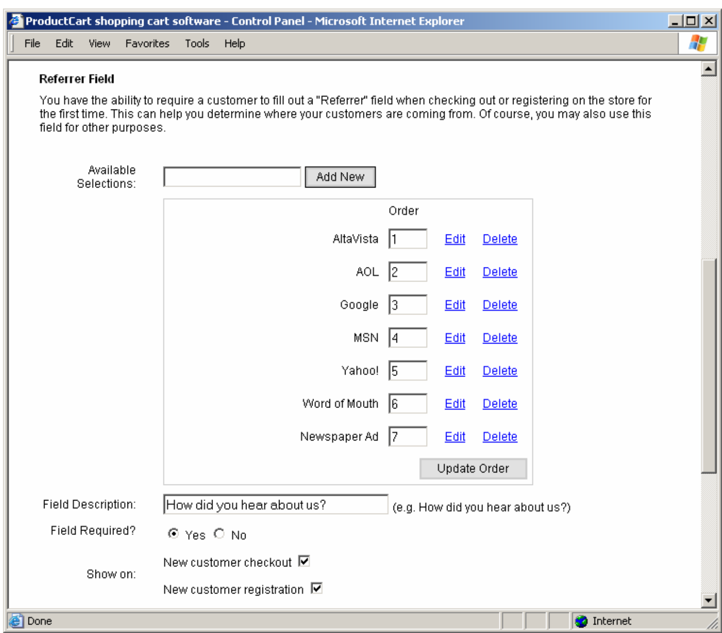
- When active, they appear below the customer's billing information on the registration and/or checkout pages, with the description entered on this page under *Field Description*.
- They can either be required or not.
- After registering with the store, users can edit the information entered in these fields by editing their account information from the customer service area of your store, or by editing the values in the fields when they checkout (the new values are saved to the database if they edit them when placing an order).
- The information provided in these fields is added to the order details and can be viewed by the store administrator when processing an order.



Referrer Drop-Down Menu. You also have the ability to ask a customer to fill out a "Referrer" field when checking out or registering on the store for the first time. This can help you determine where your customers are coming from. Of course, you may also use this field for other purposes.

The referrer field has the following characteristics:

- Unlike custom input fields, this is displayed as drop-down menu. It is shown below the billing information on the registration and/or checkout page, depending on how the feature is configured, with the description entered on this page under *Field Description*..
- The field is only shown the first time a customer visits the store. Repeat customers are not shown this field.
- The field can be set to be required or not.
- To add entries to the drop-down menu, enter a description in the *Available Selections* field, and click on the *Add New* button. The page will refresh and the new menu item will be listed.
- After adding the menu items that you would like to display, you can set the order in which they appear in the drop-down menu by entering an order number in the appropriate field. Click on the *Update Order* button to confirm the new order setting.



Newsletter Settings. ProductCart includes a *Newsletter Wizard* that allows you to send selected customers email messages about offers, new products, etc. We strongly discourage you to use this feature as a "spam" tool (spamming is also illegal in many states & countries).

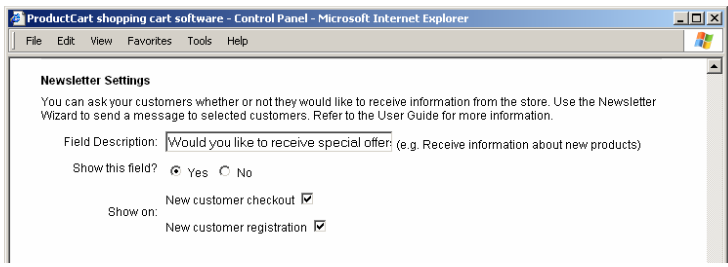
For this reason, the Newsletter Wizard feature is accessible only if the *Newsletter Settings* shown on the *Checkout Options* page are turned on, which means that customers are able to opt to receive information from your store. Newsletters and other messages should not be sent to customers that did not opt to receive them.

The *Newsletter Settings* are as follows:

- Field Description. This is the text that is displayed next to the radio button that allows customers to opt to receive messages from you. For example, the field description could say something like: "Sign up for our newsletter to receive a weekly update on new products and other offers."

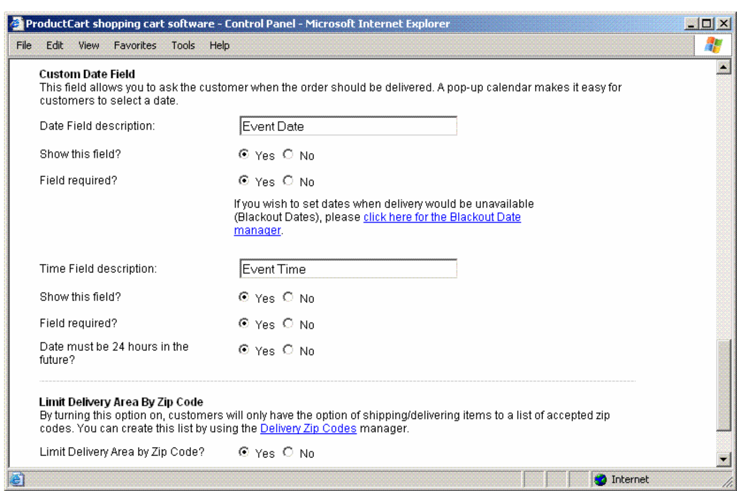
- Show this field. Turns the feature on and off. As mentioned above, if this feature is turned off, the *Newsletter Wizard* is not accessible.

- Show on …. The field description and corresponding Yes/No radio button is shown below the billing information on the registration and/or checkout page (and below the custom input fields described above, if any).



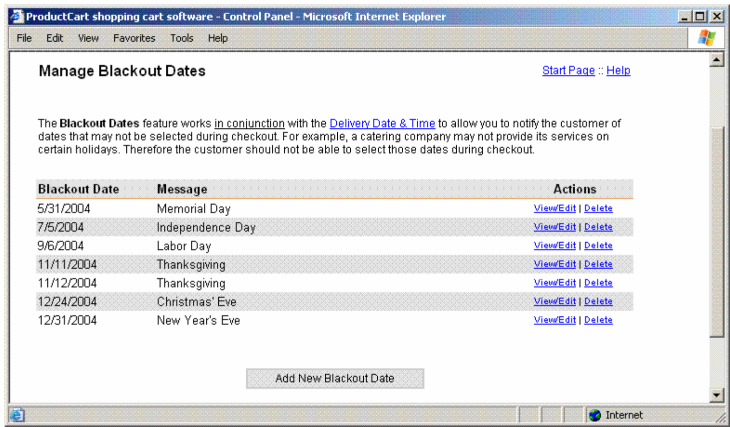
Custom Date Fields. ProductCart version 2.6 and above support the ability for a store to ask customers to specify a date & time to be associated with an order. This is especially useful for stores that sell products or services that must be delivered at a specific time (e.g. catering business). A pop-up calendar makes it easy for customers to select a date.

Both for the date and time fields you can set whether or not either field should be shown, and whether they should be required. You can also enforce an order delivery date & time that is at least 24 hours in the future.



To ensure that dates are entered in the correct format, the *Date* input field is a *read-only* field. Customers will use the pop-up calendar to select a date.

Associated with this feature is the ability to set dates for which the order cannot be delivered (or the service cannot be provided). In ProductCart, these are referred to as **Blackout Dates**. You can set Blackout Dates by selecting *General Settings > Manage Blackout Dates*.



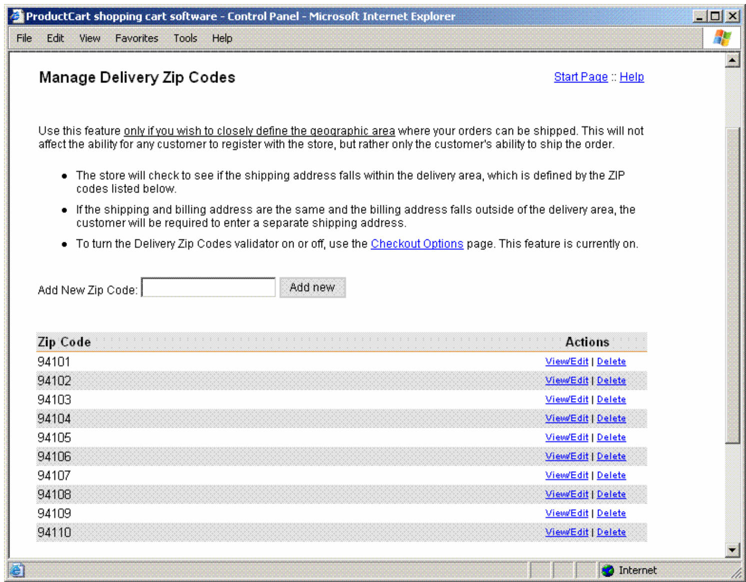
The *Blackout Dates* feature works in conjunction with the *Delivery Date & Time* feature to allow the store administrator to notify customers of dates that may not be selected during checkout. For example, a catering company may not provide its services on certain holidays. Therefore, customers should not be able to select those dates when placing an order.

When customers checkout on a store that is using this feature, a link next to the *Delivery Date* field allows the customer to see a list of blackout dates. The information is shown in a separate, pop-up window.

If a customer selects a delivery date without realizing that it is a blackout date, a message is shown and the customer is prompted to select another date. Customers will not be able to checkout unless they choose an acceptable date.

Limit Delivery Area By Zip Code. ProductCart v2.6 and above features an option to limit the store's delivery area. When the feature is enabled, customers will only have the option of shipping/delivering items to a list of accepted postal codes. This feature works well for stores whose services are only available to customers located in a specific geographic area. For example, an online grocery store may only accept orders that are shipped within a specific urban area.

This feature affects all orders and cannot be associated with a particular product or a particular shipping option. Note that the feature will not affect the ability for customers to register with the store, but rather only their ability to ship an order. In other words, the billing address is not geographically limited, only the shipping address is. If the shipping and billing address are the same and the billing address falls outside of the delivery area, the customer will be required to provide a separate shipping address.



E-mail Settings

E-mail is a very important part of your online store: the store administrator is notified via e-mail when a new order is placed; existing customers are kept up-to-date on the status of an order through e-mail messages; other customers that forgot their log-in information can be reminded by e-mail of their lost passwords; and more.

Read this section carefully so that you can fully take advantage of the e-mail management features that ProductCart offers you.

In particular, keeping your customers up to date regarding the status of their online orders will convey the image of a company committed to customer service, improve their overall buying experience and make them come back to your store. To help you implement this approach, ProductCart has been setup to automatically send your customers e-mail messages in a variety of scenarios. An e-mail message is sent to a store customer in the following circumstances:

- When an order is placed, but is not processed in real-time (e.g. offline credit card processing, payment by check, etc.). This is also the case when a payment is authorized, but not captured by a payment gateway (see the *Payment Options* section for details). In all of these scenarios, the order is considered *Pending*. ProductCart sends an "**Order Received**" message, which is not an order confirmation, but rather an acknowledgement that the order was received and that it will be processed. The message that is sent can be entirely edited by the store administrator.
- When an order is processed. An order can be processed manually by the store owner using the *Manage Orders* section of the Control Panel (e.g. an order paid for by check may be processed only when the check is received), or automatically by the system either when the payment is processed is real-time (e.g. credit card processing through a payment gateway that is set up to capture payments, or PayPal payments), or when the payment is batch-processed after having been authorized by a payment gateway (see the *Payment Options* section for details). By default, ProductCart sends an "**Order Confirmation**" message, which confirms that the order was processed and will be shipped. The store

administrator has the ability to manually instruct the system not to send the order confirmation email. The message that is sent can be partially edited by the store administrator: the copy can be edited through the *Email Settings* page, but the order details cannot as they are dynamically pulled from the store database. When the product ordered is a Downloadable Product, the order confirmation message also includes download links and product licenses (if any).

- When an order is shipped. When the store administrator enters shipping details for an order in the Control Panel and updates the order status to 'Shipped', ProductCart sends an "**Order Shipped**" message to the customer containing those shipping details. The store administrator has the ability to manually instruct the system not to send the order shipped email. The message that is sent can be partially edited by the store administrator: the copy can be edited, but the shipping details cannot as they are dynamically pulled from the store database.

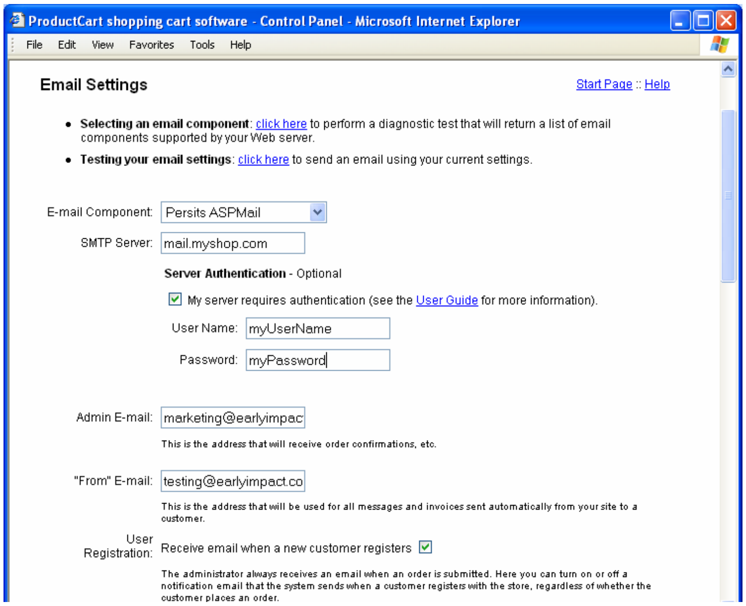
- When an order is cancelled. There are a number of reasons why an order may have to be cancelled: the customer could contact you to cancel the order, or you may never receive payment for an order, etc. When you update the order status to 'Cancelled', by default ProductCart sends an "**Order Cancelled**" e-mail to the customer. The store administrator has the ability to manually instruct the system not to send the order cancelled email. The message that is sent can be fully edited by the store administrator.

- When a request for a Return Authorization is approved or denied. Customers can request a Return Authorization when viewing details about a previous order in the *Customer Service* section of the storefront. The store administrator is notified via email, and can either approve or deny the request. In both cases, the store administrator can opt to enter comments about the decision, and send a message to the customer. The same information is also shown on the *View Previous Order* page.

- When a customer forgets his/her password. The login/check out page contains a link for existing customers that have forgotten their password. The link takes them to a form where they can enter their user name (which is the e-mail address they provided when they initially Registered with your store), and receive a message via e-mail with the password.

- When a Help Desk message is posted. ProductCart v2.6 and above include a full-featured Help Desk system that allows you to keep in touch with your customers in an organized manner. When you post a new message or reply to a customer's posting, the customer receives a message. The message contains general information about the posting and a link to the customer service area of your store where the posting can be read. The text included in the email sent to the customer can be edited by editing the file *includes/languages.asp* using Notepad or your favorite HTML editor.

For additional, technical notes on which ASP files are involved in the creation and in the sending of e-mail messages in ProductCart, please see Appendix P – Technical Notes on E-mail Messages Sent by ProductCart.



On the other hand, an e-mail notification is sent to the store administrator in the following cases:

- When an order is placed.
- When a new customer registers with the store, if the **Receive email when a new customer registers** feature is turned on (see below).
- When a customer requests a Return Authorization Number. Please see the Managing Returns section for more information.
- When a customer contacts the store using the built-in contact form.
- When a customer contacts the store using the Help Desk. Please see the Managing the Help Desk section for more information.
- When a new affiliate signs up. Please see the Managing Affiliates section for more information.

The e-mail settings window allows you to configure:

- **Selecting an E-mail Component**: Select an email component that is support by your Web server. ProductCart includes an automatic email component detection feature which can be accessed by clicking on the corresponding link. A window will pop-up and let you know which email components where detected on the server. ProductCart supports the following e-mail components:
    - ABMailer
    - CDONTS
    - CDOSYS – By default ProductCart is configured to use CDOSYS with a local SMTP server, which is the most common scenario. If you need to specify a remote server, please review the file includes/sendmail.asp and change the code as described in the comments located in the CDOSYS section of the file.
    - Jmail (version 3.7 and version 4) – www.dimac.net
    - Persist ASP Mail – www.aspemail.com

        - ServerObjects' ASP Mail – www.serverobjects.com
        - Bamboo SMTP

- **Testing your email settings**: click on the link to load a simple form that will allow you to test your current email settings. Make sure you save the current settings before using this feature. If you are using a component that is not supported by your server, you will receive an error message stating so. If you do not receive any error messages, but you do not receive the test message sent by ProductCart, make sure that the SMTP server has been correctly specified (see below).

- **SMTP Server**: This field allows you to change the name of the SMTP server used by ProductCart to send e-mails. In some cases, you will not have to change the default value, which is "localhost". If ProductCart is not sending e-mails, however, check with your Web hosting provider to see what SMTP server you should use. For example, the SMTP server could be something like: "smtp.yourWebHostingCompany.com", "mail.yourDomainName.com", or something similar. Many Web hosting companies include information about this type of setting in the frequently asked questions section of their support pages.

  If your SMTP server requires authentication, check the corresponding option and enter the user name and password for the mail server. This is typically information that is provided to you by your Web hosting company. Keep in mind that if you are not receiving e-mails, this could be the issue. Check with your Web hosting company if you are unsure of whether or not the SMTP server requires authentication.

- **Admin E-mail**: This is typically the address of the person that is managing the store, or "administrator". This address receives a notification whenever an order is placed, a request for a Return Authorization is submitted, or when a customer fills out the *Contact Us* form from the *Customer Service* area of the storefront. It also receives a notification when a customer registers with the store if the "Receive email when a new customer registers" option is checked.

- **"From" E-mail**: This is the address that is used for all messages and invoices sent automatically from your store to a customer. This address shows up as the "From" address in the message that the customer receives, and is therefore also the address that replies will be sent to, if the customer were to reply to a message.

- **Receive email when a new customer registers**: As mentioned above, the store administrator always receives an email when an order is submitted. By activating this feature you can also have ProductCart notify you whenever a customer registers with the store, regardless of whether the customer places an order.

- **Copy for Order Received E-mails**: The text that you enter here will be the message that is automatically sent to customers after an order has been placed. It should not say that the order is confirmed or processed, but only that it has been received. For example, you could use the following copy (which uses some of the variables mentioned at the end of this section):

    Dear <CUSTOMER_NAME>

    Thank you for shopping at <COMPANY>.

We received your order on <TODAY_DATE>. Your order number is <ORDER_ID>.

Note that this is not an order confirmation. You will receive a detailed confirmation message once your order has been processed. You can check the status of your order by logging into your account at <COMPANY_URL>/productcart/pc/custva.asp

If you have any questions, please do not hesitate to contact us.

Best Regards,

<COMPANY>

- **Additional Copy for Order Confirmation E-mails**: The text that you enter here will be added to the confirmation e-mail that is automatically sent to customers after an order has been processed. It will be displayed before the order details in the body of the e-mail message. For example, you could use the following copy (which uses some of the variables mentioned at the end of this section):

  Dear <CUSTOMER_NAME>

  We wanted to let you know that order number <ORDER_ID> that you placed on <TODAY_DATE> has been processed and will be shipped soon.

  This is your order confirmation. Order details are listed below.

  If you have any questions, please do not hesitate to contact us.

  Note that additional information can be added to the confirmation e-mail sent to a customer that has purchased one or more Downloadable Products. The additional copy can be entered on a product by product basis (e.g. special installation instructions for a certain software product) and is shown at the bottom of the confirmation e-mail, together with license information for the product (if any).

- **Additional Copy for Order Shipped E-mails**: The text that you enter here will be added to the e-mail that is automatically sent to customers after an order has been shipped. It will be displayed before the shipping details in the body of the e-mail message. For example, you could use the following copy (which uses some of the variables mentioned at the end of this section):

  Dear <CUSTOMER_NAME>

  We thought you may like to know that your order number <ORDER_ID> has been shipped. Shipping details are listed below.

  If you have any questions, please do not hesitate to contact us.

- **Copy for Order Cancelled E-mails**: This text will be added to the e-mail that is automatically sent to customers after an order has been cancelled. For example, you could use the following copy (which uses some of the variables mentioned at the end of this section):

  This message is to inform you that order number <ORDER_ID> that you submitted in this store on <ORDER_DATE> has been cancelled.

Variables

In all e-mail messages, you can use the following variables to pull data dynamically from your store's database and personalize your messages.

Your Company Name:	<COMPANY>
Company's URL:	<COMPANY_URL>
Today's Date:	<TODAY_DATE>
Customer's Full Name:	<CUSTOMER_NAME>
Order ID:	<ORDER_ID>
Order Date:	<ORDER_DATE>

Store Buttons

You can customize the appearance of your shopping cart buttons by uploading new buttons to your Web server. From the *Store Option* menu, select *Edit Store Buttons*.

To upload new buttons to your store, click on *Browse* and navigate to the folder on your PC where the new buttons have been saved. Do the same for all the buttons that you wish to replace. When you are done, click on the *Update* button. The new graphics will automatically be uploaded to your Web server, and the new buttons will immediately be displayed on your on-line store.

To revert back to ProductCart's standard buttons, click on *Set back to default settings*.

Note: before you can upload new buttons to your on-line store, make sure that the buttons have been saved in a compatible format (JPEG or GIF), and that they are small enough to display properly on your store (try not to exceed 25 pixels in height). The image upload feature will not allow you to upload any files other than JPEG and GIF.

If you receive an error message when uploading buttons to your store, check to see if "read/write" permissions have been appropriately set on the *pc/catalog* folder. Sometimes folder permissions need to be reset.

Here is a list of the store buttons used by ProductCart:

Small Add to Cart – Adds a product to the shopping cart (search pages)
Add To Cart – Adds a product to the shopping cart (product details page)
View Cart – Shows the user current shopping cart contents
Tell a Friend – Allows the user to send a link to a particular product page to a friend
Wish List – Adds a product to the wish list
Check out – Takes the customer to the check out page
Cancel – Cancels an order and empties the shopping cart
Back – Takes users to the previous page
Continue Shopping – Takes the customer back to the store's home page
Small More Info – Displays the product details page
Login – Takes the customer to the login page
Login & Checkout – Allows existing customers to log in during the checkout process

Continue – Goes to the next step

Recalculate – Recalculates the total after a quantity has been changed

Register – Takes a new customer to the registration page

Register & Checkout – Allows new customers to register during the checkout process

Remove from Cart – Removes a product from the shopping cart

The following buttons apply only to the Build To Order version of ProductCart:

Customize – Shows the product configuration page from the product details page

Reconfigure – Brings back to the product configuration page from the view cart page

Reset to Default – Resets the product configuration settings back to the default values

Save Quote – Allows the customer to save a product configuration as a quote

Review & Order – Turns a previously saved quote into an editable order

Submit Quote – Allow the customer to submit a saved quote to the store for review

Visit the Developer's Corner on the Early Impact Web site to download additional sets of buttons. If you are a Macromedia Fireworks® user, you will also be able to download editable collections of buttons that you can customize as you wish. You will find the Developer's Corner at the following URL:

http://www.earlyimpact.com/productcart/support/developers.asp

Store Icons

Similarly to what you can do with your store's buttons, you can customize the appearance of your shopping cart icons by uploading new icons to your Web server. From the *General Settings* menu, select *Edit Store Buttons*. The window shown below will be displayed.

Here is a list of the store icons that you can customize in ProductCart:

Error – Shown when an error or warning message is displayed.

Required Field – Shown on registration forms (e.g. when a new customer checks out)

Error on Field – This is displayed when a required field form has not been filled out

Previous and Next Page – These icons are automatically added to product and category pages when the total number of products or categories set in the *Display Settings* area is smaller than the number of products or categories in your catalog.

Zoom – Shown on product details pages only when a *Detail View Image* has been specified for the product. The larger image opens up in a pop-up window when users click on the icon. The pop-up window is automatically resized to fit the image.

Discount – Shown on product details and other pages when quantity discounts have been setup for a product.

Generate Links

Let's say that you want to add a "Search the Product Catalog" link on the "About Us" page of your Web site. The "About Us" page is likely a static HTML page that describes what your company is about. The "Search" page, instead, is a dynamic page generated by ProductCart. How do you link the former to the latter? You need to know where the search page is located and what its file name is. This is what the *Generate Link* section of the Control Panel helps you do.

Linking static pages on your Web site to the dynamic Web pages generated by ProductCart is very easy. The *Generate Links* module provides you with the HTML code to link any page of your Web site to the area of your on-line store that you have selected. To load the *Generate Links* page, select the link from the *General Settings* menu.

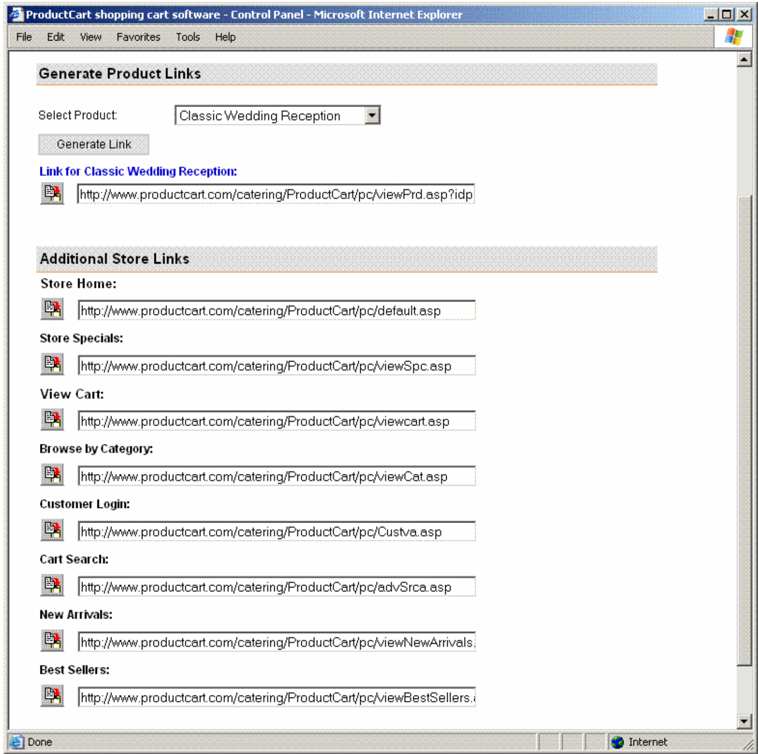
There are two types of links that you will likely use:

- **Product links**, which allow you to link directly to a product details page.
- **Store links**, which allow you to link to store pages such as the "search" page, the "browse by category" page, the "view shopping cart" page, etc.

To generate product links, select the product that you would like to link to from the drop down menu, then click on the *Generate Link* button. An absolute link (i.e. containing the site's full URL) to the product details page for that product will be displayed. This feature is particularly useful if you have static pages on your Web site that contain additional details on a certain product. The description on the product details page could contain HTML links to these additional pages (see *Add New Product* under *Manager Products* for information about the description field). And those pages could contain links back to the shopping cart, generated via the *Generate Link* feature.

The *Generate Links* page also contains a number of other useful links. These **store links** are:

- **Store home**. Links to the home page of your store, which displays featured products. For information about how to make the store home page become your Web site home page, see *Appendix A*.
- **Store specials**. Links to a page that lists all store specials. You can set a product as a special when you add a new product to the catalog, at any time when you modify a product, or through the *Specials / Discounts* menu.
- **View cart**. Displays the content of the shopping cart.
- **Browse by Category**. Displays a list of all product categories
- **Cart Search**. Loads the advanced search page.
- **Customer login**. Loads the customer login page, which is also where new customers begin the registration process.
- **New Arrivals**. It provides a list of products that were recently added to the store (the 10 latest products are shown by default).
- **Best Sellers**. Automatically displays your best selling products (the top 10 selling products are shown by default, based on the total units sold).
- **New Affiliate Signup Form**. This is a link to a form that you can use if you have an affiliate program in place for your store. Please refer to that the Manage Affiliates section of this User Guide for more information.
- **Affiliate Login**. Use this link to allow your affiliates to log into their account management area.



Note: If a Web designer is maintaining your Web site for you, he/she will not have any problems adding links to your store on any page of your Web site. All you will have to do is provide him/her with the links described above. Or, if you are comfortable with it, you can provide him/her access to your Control Panel.

If you are maintaining your own Web site, all you need is a little familiarity with how HTML links work to be able to effectively use this feature.

If you are a user of **Macromedia® Dreamweaver**, see Appendix B for more information about the Dreamweaver extension that we have created for you. It allows you to automatically generate and place the shopping cart links discussed above on any Web page created with Dreamweaver. The extension is free.

If the URLs generated on this page are incorrect, chances are that you did not provide a correct URL during the activation process, or that the path to your store files has changed. You can manually edit the path to your store files by downloading and editing the following file: *includes/storeconstants.asp*. You will see that one of the variables is the absolute path to your store. Correct it, save the file, and then upload it back to your Web server via FTP.

Generate Store Map

ProductCart v2.6 and above include a new feature that can give your customers an alternative way to browse your online store, and at the same time help you improve your search engine rankings. The *Generate Store Map* feature consists of the ability to dynamically generate an HTML store map that will include a list of categories, their subcategories, and the products that they contain, organized in a 'site map' type of layout. This feature will help you create a static category tree to be used anywhere on your Web site.

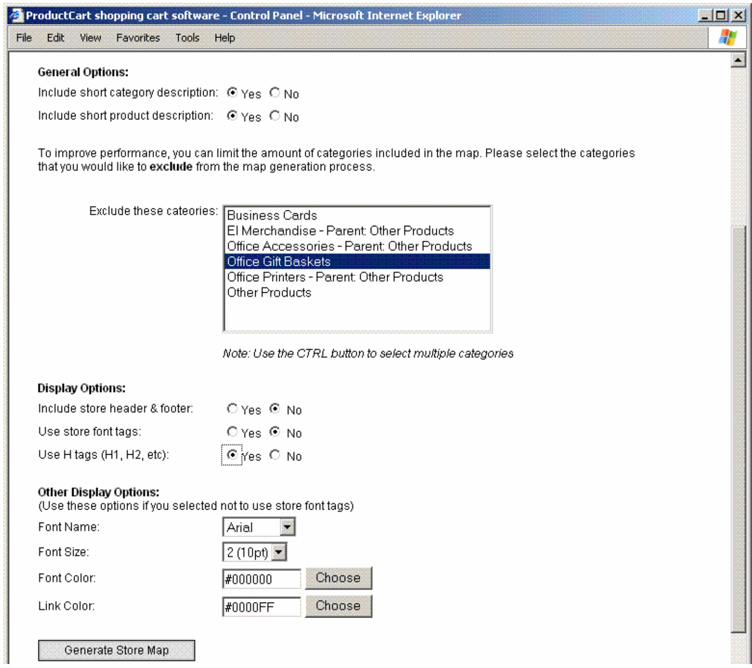
When a static page links to a dynamic page, it is more likely that the dynamic page will be spidered by a search engine. For example, a search engine spider would not automatically *browse* your store by category. In other words, it would not locate your categories, subcategories, and product details pages unless they are linked to from other Web pages. So, by linking to dynamic category and product pages from the *store map*, you will help search engine spiders locate and crawl your dynamic shopping cart pages.

Note that the HTML file that is generated when you use this feature is saved to the following location: /pc/catalog/StoreMap.html. Make sure that the catalog folder has "write" permissions before using this feature or you may receive an error.

You can copy this file and place it anywhere on your Web site, or use portions of the code that it contains in another page of your Web site.

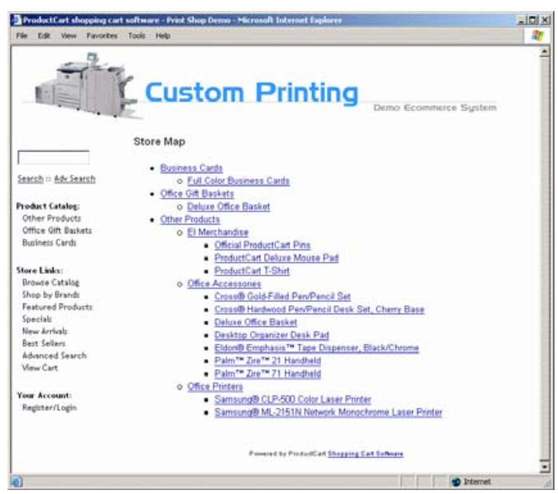
ProductCart allows you to format the *store map* using the following options.

- **General Options**. You can include or not include category and product descriptions (the short description is used in both cases).
- **Category Exclusion**. To improve performance (i.e. the time it takes ProductCart to generate the store map) or control the size of the page (i.e. the length of the store map)., you can limit the amount of categories included in the store map. Please select the categories that you would like to exclude from the map generation process. If you don't want to exclude any category, do not select any category in the selection field. Otherwise, select one or more categories to be left out of the store map. Use the CTRL button to select multiple categories.
- **Display Options**. These options will help you partially customize the look of the page that ProductCart will generate.
    - **Include Header & Footer**. Include the store's header & footer if you want to create a page that looks exactly like the rest of the store. Don't include them if you want to generate a simpler HTML page (e.g. you plan to use portions of the code within another page on your Web site, or on another Web site)
    - **Use store font tags**. The same font type and colors set in the ProductCart's Display Settings area will be used on the store map as well.
    - **Use H tags** (H1, H2, etc). ProductCart will use the heading HTML tags in the store map. This can help make the page more relevant to a search engine spider. Generally speaking, H tags increase the relevancy of the text that they contain, when used properly.
    - **Other Display Options**. Use these font settings when you opt not to use the store font tags.



You can recreate the store map unlimited times. You can also create different store maps using different categories and subcategories. However, remember that ProductCart will always overwrite the last store map it generated. Therefore, it is a good idea to save the file to your local system before generating a new store map, unless you are certain that you will not need the last store map that ProductCart created.

Here is an example of the same store map, generated from a fictitious print store. In the first example, the store map was generated without using the store's header & footer, and using custom font tags. In the second example, header and footer were included, and the store's default font tags were used.



If you receive an error when generating a store map and you selected the option to include your header and footer, a likely reason for the error might be that there is code in your header or footer that is creating a conflict with the code that generates the Store Map. To get around the problem, follow these instructions.

(1) Choose to generate the Store Map without Header and Footer.

(2) Download the file that ProductCart will generate for you.

(3) Open the file with your favorite HTML editor or Windows Notepad.

(4) Copy the entire file content (it's an HTML table).

(5) Take any page on your Web site (e.g. About Us or Contact Us), remove the copy from the main section of the page (e.g. the About Us copy) and save the file with a new name (e.g. StoreMap.html).

(6) Paste the code into this new file.

(7) You are done and you can link to this new file from any other page on your Web site.

Managing the Help Desk

To help you better communicate with your customers, ProductCart v2.6 and above are equipped with a customized version of Early Impact's **Bugs Manager** issue tracking and project management software (for more information, please visit http://www.bugsmanager.com). This means that you can now count on a customer relationship management system to help you more productively manage customer service on your store.

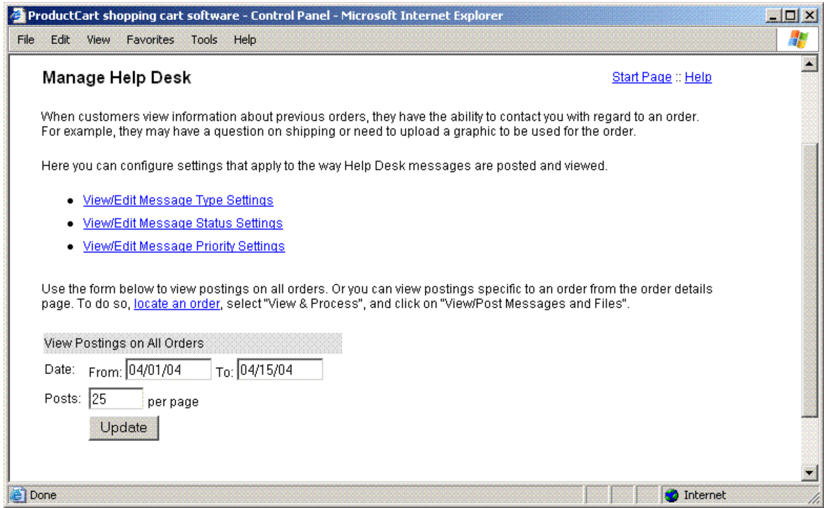
- Communicate with customers through an organized ticket system
- Keep messages associated with the order to which they pertain.
- Manage unlimited tickets and quickly review all messages related to the same ticket.
- Allow customers to upload graphics and documents after they have placed an order, by attaching files to a new ticket.

Customers will be able to open a ticket (e.g. to ask a question, enquire about the expected shipping date for an order, etc.) from their account area, when view information about a previous order. When they submit a new ticket or post a new message within an existing ticket, the store administrator is notified via email.

In the Control Panel, there are two ways to view, edit, and create Help Desk tickets:

- On an order by order basis, when viewing details for an order. First locate an order (*Manage Orders > Locate an Order*), then select *View and Process*, and then click on *View/Post messages and files* to view a list of messages related to the selected order.
- On a storewide basis, you can view all tickets submitted within a certain date range. Select *Manager Orders > Help Desk: View All Postings*. Use the input fields to specify a date range, and enter the number of products to be displayed on each page.

There are a few settings that affect the way messages are posted on the store. From the *General Settings* menu, select *Manage Help Desk*.

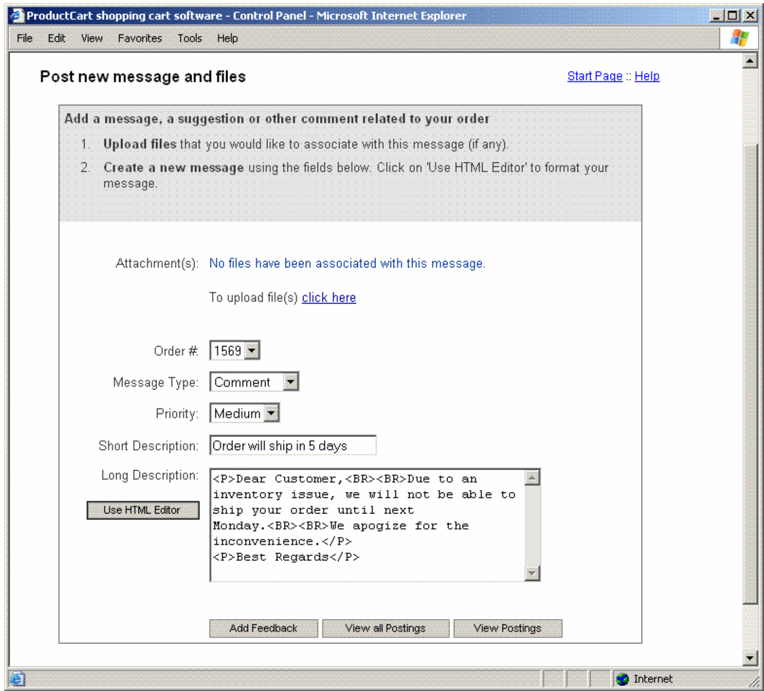


- **View/Edit Message Type Settings**. When a new posting is added a *message type* can be selected (e.g. is it a question, a problem, a complaint?). Here you can set the entries that will be displayed in the corresponding drop-down menu. When viewing messages you will be able to sort them by *type*. The message *type* can either be shown using text or an image. If you want to use images, check the option *Show Message Type Images* and enter the image file name when creating a new *type*. By default the system uses text.
- **View/Edit Message Status Settings**. When a ticket is first created, the system by default it will assign it an *Open* status. Here you can add a number of other statuses (e.g. pending, review, escalated, etc.). When viewing messages you will be able to sort them by *status*. The message *status* can either be shown using text or an image. If you want to use images, check the option *Show Message Status Images* and enter the image file name when creating a new *status*. By default the system uses text.
- **View/Edit Message Priority Settings**. When creating a new ticket a priority level can be assigned to it (e.g. an important issue vs. just a comment). Here you can edit the list of default *priorities* and add new ones. When viewing messages you will be able to sort them by *priority*. The message *priority* can either be shown using text or an image. If you want to use images, check the option *Show Message Status Images* and enter the image file name when creating a new *status*. By default the system uses images.

Use the form located at the bottom of the *Manage Help Desk* page to load all messages posted within a selected date range. Enter the number of messages in the *Posts per page* field and click on *Update*. This is the same as selecting *Manage Orders > Help Desk: View All Postings*.

Adding a new message (i.e. opening a new ticket or following up on an existing ticket) works the same way in both the Control Panel and in the storefront. The only thing that is different in the two interfaces is that the store administrator has the ability to change the status of a ticket (e.g. from *open* to *closed*), whereas the customer does not.

To add a new message, click on the *Write a Message* text link or *Add New Message* button wherever they appear in the *Help Desk* pages. In most cases, a link or button is located at the bottom of the page. The following screen will be shown to you.



The most important thing to remember when adding a new message is that **attachments** must be uploaded **before you write the message**. If you need to attach any files with the message, click on *To upload file(s) click here* and use the built-in upload tool to move the files to the Web server. You can attach multiple files to a message. Note that for security reasons only *.txt, *.htm, *.html, *.gif, *.jpg, *.pdf, *.doc and *.zip file types can be uploaded.

Once you are done attaching files, if any, fill out the rest of the form.

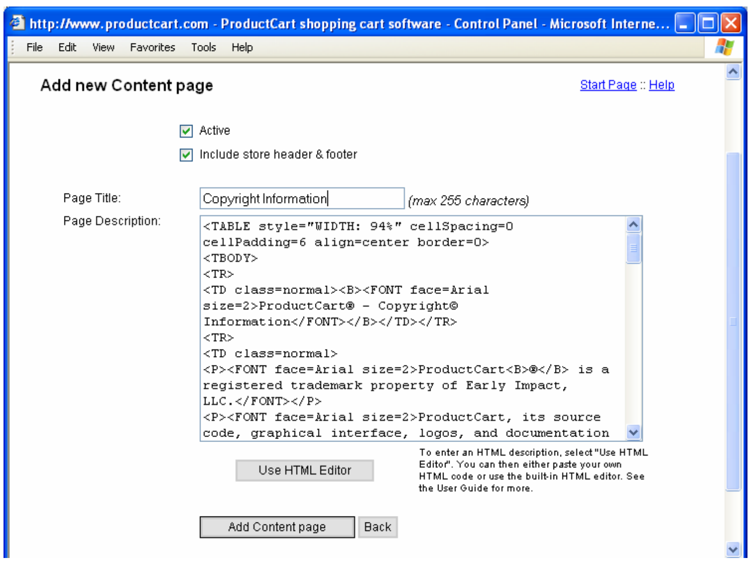
- **Order #**. Select the order to which this message should be associated. When a customer is posting a message, only orders that he/she placed will be shown in the drop-down.
- **Message Type**. Select the type of message that you are adding (e.g. comment vs. issue).
- **Priority**. Assign a priority to the message.
- **Short Description**. This is the message title. It will be included in the email notification that is sent to the customer (or to you if the customer is posting a message).
- **Long Description**. This is the message body. Use the HTML editor to format the message. The message itself is not sent via email. The notification email will only include the *Short Description* and a link to the message.

If you are writing a message, the customer will be notified via email. If the customer is writing a message, you will. In both cases, the email contains information about when the ticket was opened, by whom, which order it relates to, when it was last updated, and what its status and priority are.

Managing Content Pages

New in ProductCart v2.75 is the ability to create and manage *Content Pages* right from within the ProductCart Control Panel. Many ProductCart users expressed interest in being able to manage pages such as "About Us" , "Customer Service", etc. directly from the Control Panel. In response to these requests, ProductCart v2.75 features a basic content management system that allows you to create and manage any number of Web pages, without using an external HTML editor.

To access this feature, select *General Settings > Manage Content Pages* from the Control Panel navigation menu. Click on *Add New Content Page* to add a new page. Use the built-in HTML editor to create the page or copy text or HTML code from another program. ProductCart v2.75 uses an advanced HTML editor published by InnovaStudio (http://www.innovastudio.com/editor.asp). To learn how to best take advantage of this powerful tool, see the tutorials listed on the following page: www.innovastudio.com/editor_tutorial.asp



Check the *Active* option unless you want this page to remain inactive. Inactive pages cannot be accessed by your customers.

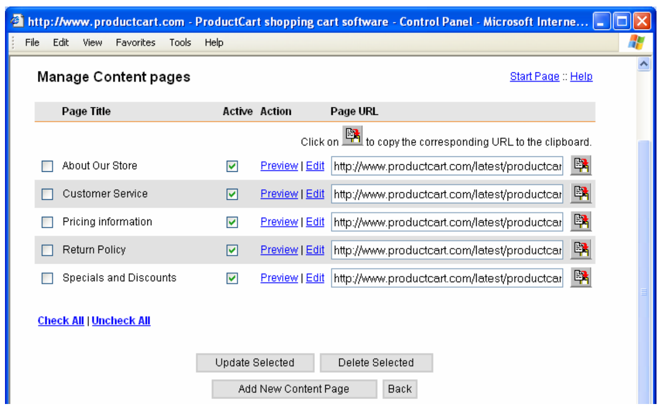
Check the *Include store header & footer* option if you would like ProductCart to create a page that includes the store's graphical interface. If this is the case, and if you decide to copy HTML code that you have created in another HTML editor (e.g. MS FrontPage, Macromedia Dreamweaver, etc.), make sure to include only code that is in between the <body> and </body> tag. For example, you can certainly copy and paste an HTML table that you have created in your favorite HTML editor, but you should not copy an entire HTML page. If you wish to copy an entire HTML page into the *Page Description* field, then make sure not to select the *Include store header & footer* feature. In other words:

- If you are entering an entire HTML page into the *Page Description* field, do not select the *Include store header & footer* option.
- If you are using the built-in HTML editor or are copying a portion of an HTML page from another HTML editor, select the *Include store header & footer* option.

Enter a *Page Title:* this is the title that is used by ProductCart's header.asp file for the <title> tag for the page, assuming that you are using the dynamic meta tag generator mentioned in the Making Your Store More Search Engine Friendly section. Therefore, the title will not be shown in the body on the page.

Click on *Add Content Page* to save your new content page to the ProductCart database. All of the content pages that you have created are listed on the *Manage Content Pages* page. At any time you can edit a page using ProductCart's built-in HTML editor.

To allow customers to find the content pages that you have created, link to them from other pages on your Web site, and/or from your store's navigation. You can copy the location of the page to your *clipboard* by using the button situated on the right side of the page URL.



Technical Note: dynamically loading a list of content pages

The default version of header.asp contains some ASP code that dynamically loads content page titles and corresponding links from the store database. This allows you to create a list of links to these pages that is automatically updated every time you add a new page and remove/edit an existing page.

You could place this code anywhere in your custom version of header.asp (or another file set up to query the ProductCart database) to load such list. If you copy and paste the code below, make sure to review and edit it in your HTML editor as it might contain extra line breaks that should not be there. Alternative, you can copy the same code directly from the default version of header.asp.

```
<% ' Show List of Content pages
	sdquery="SELECT pcCont_IDPage,pcCont_PageName FROM pcContents where
pcCont_InActive=0;"
	set rsSideCatObj=conlayout.execute(sdquery)
	do while not rsSideCatObj.eof
%>
<a href="viewContent.asp?idpage=<%=rsSideCatObj("pcCont_IDPage")%>"
class="leftnav"><%=rsSideCatObj("pcCont_PageName")%></a>
<%
	rsSideCatObj.MoveNext
	loop
	set rsSideCatObj=nothing
%>
```

Managing Countries and States

In ProductCart every drop-down menu that lists states and countries both in the storefront and in the Control Panel is database driven. ProductCart's database includes a table for *Countries* and a table for *States*. Use the *Manage Countries* and *Manage States* features to add/edit/remove items to/from those tables.

For example, if you store is located in the United States and you only ship to customers in the US and Canada, you can remove all other countries from the list.

Using the right state and country codes is very important if your store uses dynamic shipping providers (e.g. FedEx, UPS, etc.). Therefore, note the following:

- If you are re-entering a US state that you had previously deleted, make sure to use the official abbreviations. The following is a link to a Web page on the United States Postal Service's Web site that may be helpful:

  http://www.usps.com/ncsc/lookups/abbreviations.html#states

- Similarly, if you are re-entering a Canadian province that you had previously deleted, make sure to use the official abbreviations. The following is a link to a Web page that may be helpful:

  http://canadaonline.about.com/library/bl/blpabb.htm

- If you are entering or re-entering a country, the following is a link to a Web page that may be helpful:

  http://www.iso.ch/iso/en/prods-services/iso3166ma/02iso-3166-code-lists/list-en1.html

To restore the original settings, click on the *Restore Default Settings* button on both the *Manage States* and *Manage Countries* pages. This feature adds back to the list all states and countries that were originally included. This can be very useful if you only sell your products locally, but then decide to also sell them internationally: you won't have to manually re-add all the country codes.

Managing Multiple Control Panel Users

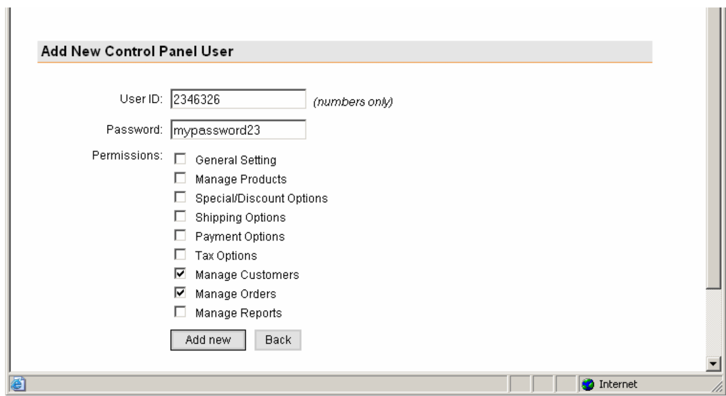
ProductCart allows the store administrator to add additional Control Panel users, each with access rights that can be limited to specific areas of the Control Panel.

For example, let's assume that the store administrator needed help with processing online orders: he/she can now create a new Control Panel user whose access rights are limited to the "Manage Orders" area of the Control Panel.

To create a new Control Panel user, select *Manage Users* from the *General Settings* menu. You will see a list of active users, excluding the store administrator. You can easily add, edit, or remove users. To add a new user, click on the *Add New User* button. The page shown below will be displayed.

- Enter a User ID (numbers only)
- Enter a temporary password, which the user can later edit.

- Set the user's permissions. You can give the user access to one or more of 9 areas in which the Control Panel has been divided. When users log into the Control Panel, they are only shown the menu items that give access to the pages that are part of the permitted areas. In addition, every page in the Control Panel contains code that ensures that even if the user attempted to load a page by entering the page's URL in the browser address field, they would be denied access to it if the page belongs to an area of the Control Panel for which they don't have permissions. The user is instead automatically redirected to the Control Panel welcome page.



Technical Notes for Advanced Users. If for any reason you decide to customize the way the Control Panel works., modifying existing features or adding new ones, please note the following with regard to the feature described above:

1. All ASP files included in the '/pcadmin' folder and its subfolders should include the following code before all other include files:

```
<%PmAdmin=CODE_NUMBER%>
<!--#include file="adminv.asp"-->
```

2. The following code numbers handle access permissions:

   0: The file can be accessed by any Control Panel user

   1: The file can be accessed only by users that have "General Settings" permissions.

   2: The file can be accessed only by users that have "Manage Products" permissions.

   3: The file can be accessed only by users that have "Special/Discount Options" permissions.

   4: The file can be accessed only by users that have "Shipping Options" permissions.

   5: The file can be accessed only by users that have "Payment Options" permissions.

   6: The file can be accessed only by users that have "Tax Options" permissions.

   7: The file can be accessed only by users that have "Manage Customers" permissions.

   8: The file can be accessed only by users that have "Manage Affiliates" permissions.

   9: The file can be accessed only by users that have "Manage Orders" permissions.

   10: The file can be accessed only by users that have "Manage Reports" permissions.

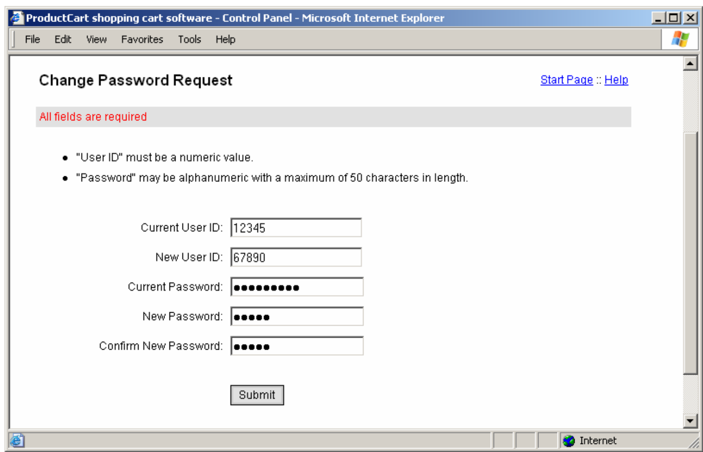
   19: The file can be accessed only by the Store Administrator.

Changing the Administrator's Login

When you activated ProductCart, you were asked to provide the temporary user ID and password that were given to you at the time of purchase. You can change the user ID and password at any time by selecting *Change Admin Login* from the *General Settings* menu.

Please note:

- The user name can only be a number (e.g. 12345)
- The password can be a combination of letters and numbers (up to 50)
- You must provide your existing user ID and password to create new ones



> **<u>Security Note</u>**: The technical reason why ProductCart requires the Control Panel User ID to be numerical is that a numerical User ID, along with an encrypted alphanumeric password, makes it harder for anyone to try to hack into a store and/or the store database by inputting a database query string. In other words, this approach reduces the chances for a SQL injection.

Enter your existing user ID, the new user ID, your existing password, the new password twice to confirm your selection, and then click *Submit*. For security reasons ProductCart will compare the two entries to the existing user ID and password currently in your store database, and return an error message if they don't match. ProductCart will also return an error message if the field values don't follow the guidelines listed above (e.g. if you use letters in the user ID field). When the form is submitted successfully, ProductCart will display a confirmation message.

> **<u>Security Note</u>**: Whoever is in possession of your Control Panel's User ID and Password has access to virtually every aspect of your online store. Make sure that you keep your password in a safe place and that you do not share it with anybody other than those people that you want to have full access to your store. In addition, it is a good idea to regularly change your user ID and password.

Chapter

4

Managing Products

The *Manage Products* menu allows you to add products to your on-line catalog using a form or step-by-step using the *Product Wizard*. It also allows you to modify existing products, add product options (e.g. color and sizes), add or edit product categories, and more. If you plan to import product information from an existing database, please carefully read the guidelines listed in the section entitled Importing an Existing Product Database.

If you are using the Build To Order version of ProductCart and are looking for information about BTO products and items, please refer to Chapter 14.

Getting Ready to Add Products

Before you start adding product information to your on-line catalog, it is a good idea to get the product information ready. Here is a list of the things that you can add to your product catalog, along with some comments related to their formats.

- **Product name, SKU, and descriptions**. The description fields support HTML tags, so you can use the product description that you have already used in another Web page, by copying and pasting the HTML code. If you don't have a formatted product description, just use plain text. ProductCart includes a built-in HTML editor that allows you to add simple HTML tags when entering the description (e.g. make a word bold; create a bulleted list; etc.).

  For more advanced HTML formatting, we recommend that you use an HTML editor such as Microsoft FrontPage or Macromedia Dreamweaver, then copy and paste the code into ProductCart's HTML editor. Make sure to paste the code into the HTML editor, not the product description input field.

- **Pricing information**. You can set 3 prices for each product: List price, your price, and a wholesale price. The only one required by ProductCart is "your price", which may or may not coincide with the list price. The wholesale price is optional. See below for more details.

- **Product images**. You can have 3 images for each product.

  - Thumbnail. This is the small image that typically appears on all pages that display more than one product (e.g. search pages, etc.). The size of this image should be **100 x 100 pixels** or less. The supported formats are JPEG and GIF, which are the standard graphic formats acceptable for the Internet.

- General Image. This is the image that is displayed on the product details page. The size of this image should be **200 x 200 pixels** or less. The supported formats are JPEG and GIF.
- Detailed View Image. This is a larger image that store visitors can view by clicking on the standard image on the product details page. There are no size limitations for this image, but you should take into account users that don't have a fast Internet connection or large monitors. For this reason, you should try to keep your large images smaller than 600 x 450 pixels.

With ProductCart you can **automatically generate product images** from a source image file. This new utility allows you to upload and resize an image, automatically creating the three image files mentioned above. See the *Adding New Products* section of this chapter for more information on how to use this feature.

- **Product Categories**. Are your products organized in categories? If not, you may want to consider organizing them in categories before you start adding them to the catalog. This way when you add a product to the store database, you will already know which category to place it into. ProductCart supports multiple subcategory levels. In other words, you could have "Toys/Babies/Bath Toys" where "Bath Toys" is a subcategory of "Babies", which is a subcategory of "Toys". In ProductCart's terms, the *root* is where all top-level categories are located. "Toys" is the *parent category* of "Babies".
- **Product Options**. Do your products come in different sizes, colors, etc.? Have those details available as well. In ProductCart, they are called *Product Options*.

Importing an Existing Product Database

ProductCart allows you to quickly populate your product catalog (database) by importing information from an existing product database or data file. If you are not planning to import product information from an existing database, skip this section and move onto the next one. Otherwise, carefully read the following paragraphs.

Properly preparing your database file prior to importing it into ProductCart can save you a lot of time (*and headaches*). The vast majority of technical support requests that we receive from customers that are using the Import Wizard are due to improper formatting of the file to be imported. For example, users often forget to define the import range in their Microsoft Excel file (please see below for details on how to do so).

ProductCart supports importing from the following file types:

- Microsoft Excel (*.xls)
- Comma Separated Value (*.csv)

Importing a product database into ProductCart requires the following steps:

1. Properly formatting your file. The steps to be taken are different depending on whether you are planning to use a *.xls or *.csv file.
2. Uploading the file to your server. You can either use the built-in upload feature or FTP the file to the *catalog* subfolder within the *pc* folder.

3. Specifying whether you are importing new products or updating existing products.
4. Mapping fields from the file to ProductCart's database.
5. Confirming mapped fields.
6. Performing the import.
7. Reviewing which records could not be imported and why.

ProductCart's **Import Wizard** will guide you through the process step by step, as explained later in this section. First, however, you will have to spend a little time formatting the file so that it can be seamlessly imported into ProductCart.

Formatting your file

Carefully review the requirements for each field so that you will not run into conflicts when mapping the fields. In addition, we strongly suggest that you remove columns that do not contain data, so that the file that you upload to ProductCart is smaller in size and mapping is less confusing. And you may also want to rename the column headings so that they can easily be recognized when mapping the fields.

An empty excel file with the available fields for importing is available for download from the following URL: http://www.earlyimpact.com/productcart/support/sample_import_file.zip

Regardless of which file type you plan to use during the import, it is very important that you make sure your file is formatted properly prior to importing into ProductCart.

Preparing an Excel file for import

If you are importing an Excel file, <u>the following steps MUST be taken</u> in order for the import to be successful:

<u>STEP 1</u>: Convert all SKU values in the .XLS file to *Text*:

- Open your .XLS file in Excel.
- Select the SKU column by left clicking on the Column header.
- Select the menu item: *Data > Text to Columns*. The *Convert Text to Columns Wizard* will be displayed.
- In Step 1 of the wizard, click on the *Next* button.
- In Step 2 of the wizard, click on the *Next* button.
- In Step 3 of the wizard, select *TEXT* in *Column data format*, then click on the *Finish* button.

<u>STEP 2</u>: Create a name for the data range:

- The Excel import feature requires a named range and the range must be named "IMPORT".
- Select (highlight) the entire data range that you want to import (including the top row, which should contain the field names).
- Select the menu item: *Insert > Name > Define*
- Enter the name "IMPORT" without the quotes and click on the *Add* button.
- Save the .XLS file.

Here is an example of what the IMPORT range should look like (it **must** contain all cells that are part of the IMPORT, including the header or top row – such as the shaded area in the example below):

IMPORT *fx* sku

	A	B	C	D	E	F	G	H	
1	sku	name	description	price	list	wholesale	weight	stock	cat
2	sun1	Sunset 1	This is a beautiful sunset!	50	60	40	16	20	Pic
3	sun2	Sunset 2	This is a beautiful sunset!	60	72	48	16	20	Pic
4	sun3	Sunset 3	This is a beautiful sunset!	72	86.4	57.6	16	20	Pic
5	flower1	Flower 1	This is a beautiful flower!	100	110	90	16	20	Pic
6	golf1	Golf 1	This is a beautiful golf picture!	120	130	110	16	20	Pic
7	laguna1	Laguna 1	This is a beautiful beach pictur	140	150	130	16	20	Pic
8	sanfran	San Fran	This is a beautiful picture of Sa	200	220	180	16	20	Pic
9									
10									
11									

The vast majority of technical support requests that we receive from users of ProductCart that are not able to successfully import an XLS file are due to improperly setting the IMPORT range. If you are experiencing problems, please review the steps outlined above to make sure that the IMPORT range has been properly defined.

> **Note**: If you are planning to import complex product descriptions containing HTML code, we **strongly recommend** that you import an Excel file and NOT a CSV file. The way fields are separated in a CSV file (i.e. using a comma) can create conflicts with some of the characters used in your HTML code. In our internal tests, we did not encounter any issues importing HTML descriptions using an Excel file. Always remember to back up your existing database before performing any product import or update.

Updating data within an existing store database

You can either import new product data or **update/append data** to an existing product database. For example, if you need to update the list price of 300 existing products in your store, you could import a file that only contains the SKU and the updated price.

If you wish to update/append data, select that option during the import procedure: the Import Wizard will prompt you to make a selection after you have uploaded your data file to the system. ProductCart will use the SKU (part number) field as the product identifier and update database records whose SKU is an exact match with the data that you are importing. If the SKU is not an exact match, a new product (database record) will be added (in which case it must also contain the 3 additional required fields). The field is not case sensitive.

Fields Description

You can import the following fields. Please carefully read the format requirements.

Field Name	Data Type	Required	Comments
SKU	Text	Yes	Product part number. Text string (alphanumeric characters). Max characters: 50 (Access), 100 (SQL). Used as product identifier when updating data: only if SKU is an exact match data is updated.
Name	Text	Yes*	Product name. Max 255 characters.
Description	Text	Yes*	Product description. It can contain HTML tags. Max characters: unlimited (Access and SQL). Note: do not use HTML code created by MS Word as it may create conflicts.
Short Description	Text		The purpose of the Short Description is to allow the display of a few key lines of product information on the product details page while keeping the "Add to Cart" button above the fold. The Short Description is also used by all of the category display options with the exception of: "viewCat_h.asp".
Product Type	Text		For standard products, leave blank. For downloadable products, enter "DP" (without the quotes). For Build To Order products, enter "BTO" (same). For Build To Order Items, enter "ITEM" (same). See paragraph later in this section for more information.
Online Price	Number	Yes*	This is the product price. It can be zero. If importing a BTO product, this is the base price (see Chapter 14 for more information).
List Price	Number		This can be shown on the store below the product price, stricken through.
Wholesale Price	Number		Optional price for wholesale customers.
Weight	Number		Weight in ounces or grams, depending on how the store has been setup upon activation. E.g. for 4 pounds, enter 64. For 5 Kg, enter 5000.
Stock	Number (Integer)		Stock level. If empty or zero make sure to set the store to ignore inventory settings (see section later in this chapter). You can also ignore inventory settings on a product by product basis.
Category name	Text		This is the name of the main Category to which the product is assigned (vs. the additional categories mentioned below). All products must be assigned to at least one category. If blank, the product is placed in a temporary category. If the name doesn't match an existing category name, a new category is created. Max characters: 50 (Access), 100 (SQL).

Field Name	Data Type	Required	Comments
Short category description	Text		Provides information on the subcategories that the category might contain. It can contain HTML tags. Max characters: unlimited (Access and SQL). Note: do not use HTML code created by MS Word as it may create conflicts. See later in this chapter for more details on category descriptions.
Long category description	Text		Provides information on the products that the category contains. It can contain HTML tags. Max characters: unlimited (Access and SQL). Note: do not use HTML code created by MS Word as it may create conflicts.
Category Small Image	Text		Refers to the main Category. File name, no path. All images should be uploaded to the "pc/catalog" folder. Small image displayed when users browse the store, only if the "Display category images" feature is on.
Category Large Image	Text		Refers to the main Category. File name, no path. All images should be uploaded to the "pc/catalog" folder. Larger image displayed only with display options that require it.
Parent Category	Text		If blank, the main Category is placed in the root. If it matches an existing category, then the main Category is imported as a subcategory of that Parent. If it doesn't match any existing category, a new Parent category is created in the root, and the main Category is assigned to it.
Additional Category 1	Text		Assigns the Product to an additional category. If the category does not exist, a new category is created.
Parent Category 1	Text		Parent category for Additional Category 1. If blank and Additional Category 1 is not blank, Additional Category 1 is added to the root. If it matches an existing category, then Additional Category 1 is imported as a subcategory of that category. If it doesn't match, a new Parent category is created in the root, and Additional Category 1 is assigned to it.
Additional Category 2	Text		Assigns the Product to an additional category. If the category does not exist, a new category is created.
Parent Category 2	Text		Parent category for Additional Category 2. If blank and Additional Category 2 is not blank, Additional Category 2 is added to the root. If it matches an existing category, then Additional Category 2 is imported as a subcategory of that category. If it doesn't match, a new Parent category is created in the root, and Additional Category 2 is assigned to it.
Brand Name	Text		If blank, product is not assigned to a brand. If it doesn't match an existing brand, a new brand is created.

Field Name	Data Type	Required	Comments
Brand Logo	Text		File name, no path. All images should be uploaded to the "pc/catalog" folder. Shows on Browse by Brand page when "Show Brand Logo" option is turned on.
Thumbnail Image	Text		Product thumbnail image. Recommended size is 100 x 100 pixels or less. Jpeg or GIF. Both file name and paths are accepted: the import wizard automatically retrieves the file name from a path. All images should be uploaded to the "pc/catalog" folder.
General Image	Text		Product image displayed on the product details page. Recommended size is 200 x 200 pixels or less. Same as above.
Detail view Image	Text		Product image displayed on the product details page via the "Zoom: feature. Any size. Same as above.
Active	True/Yes = -1 False/No = 0		Whether the product is active. If blank, it defaults to "True".
Show savings	True/Yes = -1 False/No = 0		Whether the store should show the difference between Online and List Price. If blank, it defaults to "True".
Special	True/Yes = -1 False/No = 0		Whether the product should be added to the list of Specials. If blank, it defaults to "False".
Reward Points	Number (Integer)		Reward Points that customers will accrue when purchasing this product.
Non-taxable	True/Yes = -1 False/No = 0		Whether the product is non-taxable. If blank, it defaults to "False".
No shipping charge	True/Yes = -1 False/No = 0		Whether shipping charges should not be calculated for this product. If blank, it defaults to "False".
Display no shipping text	True/Yes = -1 False/No = 0		Whether the text indicating that no shipping charges are applied to the product should be displayed. If blank, it defaults to "False".
Minimum Quantity	Number (Integer)		Minimum quantity customers have to purchase when they purchase this product. See later in this chapter for more details on this feature.
Not for sale	True/Yes = -1 False/No = 0		Whether the product is not available for sale. If blank, it defaults to "False".
Not for sale copy	Text		Text description (e.g. *Coming Soon*). Only used if "Not for sale" option is set to True.
Disregard Inventory	True/Yes = -1 False/No = 0		Whether general inventory settings should not apply to the selected product. If the store is setup not to allow the purchase of out of stock items, the selected product can be purchased regardless of its inventory level, when option is set to True. If blank it defaults to "False".

Field Name	Data Type	Required	Comments
Custom Search Field (1)	Text		Both field name and field values are imported. Learn more about Custom Search Fields.
Custom Search Field (2)	Text		
Custom Search Field (3)	Text		
Oversized Product Details	Text		It must follow the format: **N1xN2xN3** where N1, N2 and N3 are numbers (inches or centimeters) that correspond to the height, width, and length of the box in which the oversized product is shipped (e.g. 12x12x24). When the format is correct, the product is set as "Oversized" and the box dimensions are stored in the database. See the Shipping Options section for more information about shipping oversized products.
The following fields apply only if the Product Type is "DP" (Downloadable Products)			
Downloadable File Location	Text		Enter the full path on the server's hard drive to the downloadable file. For example: D:\web\my_account\my_files\file.zip
Make Download URL Expire	True/Yes = 1 False/No = 0		Enter 1 if you want the download URL to expire, otherwise enter 0.
URL Expiration in Days	Number (Integer)		Enter the number of days you want the download URL to remain active.
Use License Generator	True/Yes = 1 False/No = 0		Enter 1 if you want to use a License Generator for this Product, otherwise enter 0.
Local Generator	Text		If your Downloadable Product requires a License, enter the name of the file that generates this License (not the path). For example: myLicense.asp The file must be placed in the following folder: /ProductCart/pcadmin/licenses/
Remote Generator	Text		If your Downloadable Product requires a License that is generated by a Remote Server, enter the HTTP:// path to the file on the remote server here.
License Field Label 1	Text		This is a field used to label information generated by your License Generator. For example: "License Key"
License Field Label 2	Text		This is a field used to label information generated by your License Generator. For example: "User Name"
License Field Label 3	Text		This is a field used to label information generated by your License Generator. For example: "Password"
License Field Label 4	Text		This is a field used to label information generated by your License Generator. For example: "Key ID"
License Field Label 5	Text		This is a field used to label information

Field Name	Data Type	Required	Comments
			generated by your License Generator. For example: “Serial Number”
Additional Copy	Text		This is the Additional Text that will be added to the e-mail confirmation sent to the customer. E.g. it can include installation instructions.

Notes:

- (*) The “SKU”, “name”, “description” and “online price” fields are **required** during a fresh data import, but are not required when appending data to the database. Only the SKU is required during an Update/Append…. plus whatever field(s) you are updating.
- If you are importing a CSV file, do not use double or single quotes at the beginning of any field (e.g. this is not valid: “The King of Torts”, John Grisham; the valid formatting would be: John Grisham, “The King of Torts”).

Note: To ensure that you can quickly revert back to the way your store database was structured before performing an import or update, we strongly recommend that you ALWAYS BACK UP your existing store database before performing an import or update procedure. If your store uses a MS Access database, you can simply download the *.mdb data file to your computer. If your store uses a SQL database, enquire with your Web hosting company about how you can have your database backed up and restored.

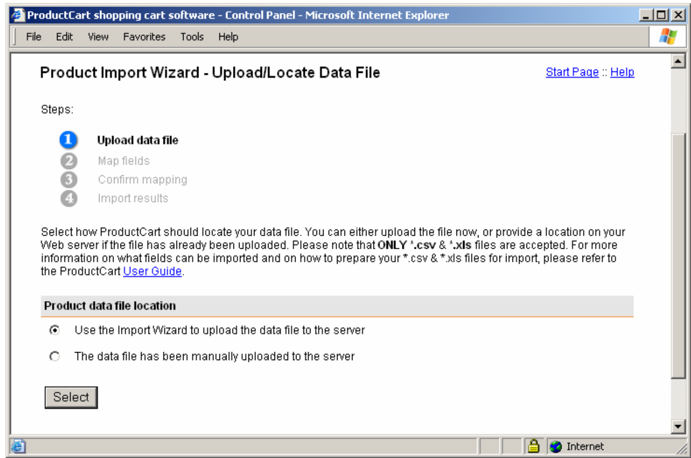
Product Type (ProductCart Build To Order and Downloadable Products only)

The Import Wizard allows you to specify which type of product you are importing: a Standard Product, a Downloadable Product, a Build To Order Product, or a Build To Order Item (for more information about the difference between a BTO Product and BTO Item, please refer to the Chapter 14). To specify the type of product that you are importing, use the following values in your import file, without the quotes:

- Leave the field blank if you want the product imported as a Standard product. Therefore, if the field is blank or the field is not mapped during the import, products are assumed to be Standard products.
- Add the value “BTO” if you want the product imported as Build To Order product
- Add the value “ITEM” if you want the product imported as Build To Order Only Item
- Add the value “DP” if you want the product imported as a Downloadable Product

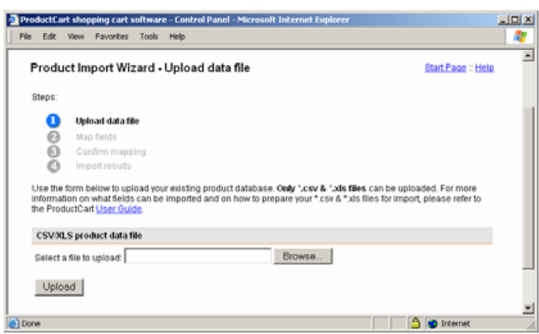
Step 1 – Upload the file

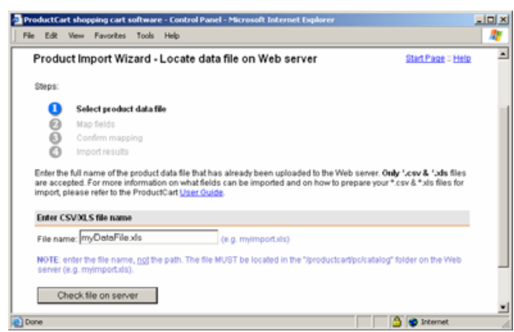
Now that you have prepared your Ms Excel or CSV data file for importing it into ProductCart, select *Import Products* from the *Manage Products* menu. ProductCart’s **Import Product Wizard** will be started and the following screen will be displayed.



Make sure to **back up the ProductCart database** before proceeding (e.g. FTP the file to your local computer). This is especially important if you are importing data into already active store. You will be able to quickly restore the database in case for any reason the import procedure did not complete successfully.

You can either upload the data file through the Import Wizard or via FTP (recommended for large files). If you choose to upload the file through the Import Wizard, browse to the file and then click on the *Upload* button. The form is validated to make sure that only *.XLS and *.CSV files are uploaded to ProductCart. If you prefer to use FTP, you must place the file in the following folder: "*pc/catalog*" and then enter ONLY THE FILENAME in the field provided. ProductCart will verify that the file exists on the server before proceeding to Step 2.



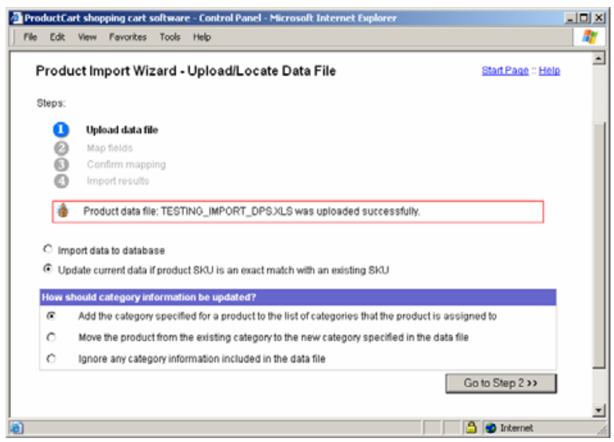


Once the file has been uploaded/located successfully, the Import Wizard will ask you to choose whether you intend to import new data to the database, or update existing data.

- If you are **importing data** into your store database, ProductCart will NOT import products whose SKU matches that of products that already exist in the database, to avoid importing duplicates. Products that could not be imported due to a SKU match are listed at the end of the import procedure.
- If you are **updating data** note that the SKU is used as the product identifier. A product's data will be updated when the SKU is an exact match. If the SKU is not an exact match, a new product will be added. When you are updating the product catalog, you will need to

make a selection among the following three options, with regard to the way category information is imported:

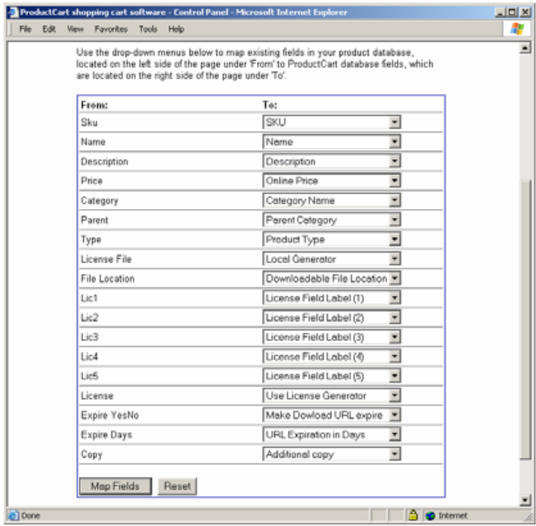
- *Add the category specified for a product to the list of categories that the product is assigned to.* This option allows you to add new categories to the list of categories that the selected product is already assigned to. Since you can import up to 3 categories for each product, this option allows you to quickly add products to multiple categories.
- *Move the product from the existing category to the new category specified in the data file.* When this option is selected, the product is removed from the current category and assigned to a new one.
- *Ignore any category information included in the data file.* Any category information in the data file is simply ignored, i.e. a product's category assignment is not altered.

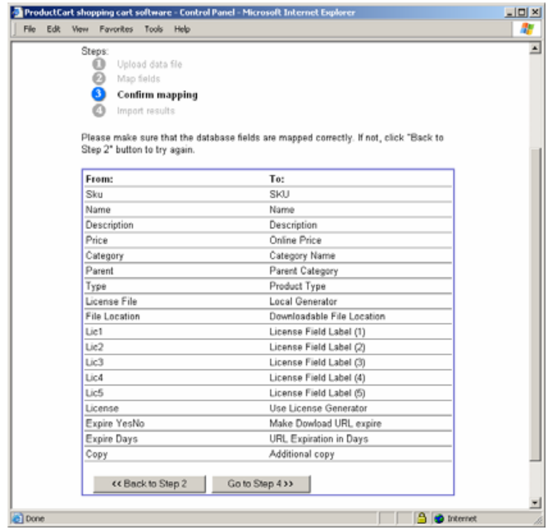


Step 2 – Map the fields

The next window allows you to easily map fields between the two databases. Your import file's column headings are listed on the left side and ProductCart's on the right. Carefully map each field. Leave blank the ones for which you do not have any information to import. Note that the following fields are <u>required</u>: SKU, name, description, online price. If any of these fields are not mapped, you will receive an error message and will be prompted to map them.

Make sure that you don't map the same field twice. If you do so, ProductCart will return an error message and will prompt you to verify that all fields are mapped uniquely.





Step 3 – Confirm mapped fields

Next, ProductCart shows you the fields as you have mapped them. Verify that the information is correct, and then proceed to the next step. Otherwise, go back to Step 2 and change the incorrect mapping settings. ProductCart will now start populating the database. Depending on the number of records that you are importing, this task may take several minutes.

Step 4 – Import completed

Once all records have been imported, ProductCart will display a report that lists the number of records successfully imported, those that could not be imported and why. For example, you will be shown a list of products that could not be imported due to the fact that some of the required fields were not present, or because you were importing duplicate SKUs.

To visually confirm that the import was successful, navigate to the product catalog (thru the storefront) to verify that product information was imported as you expected. Also, select *Manage Categories* to ensure that the category tree that you imported was organized correctly.

> **Note**: Any product that could not be placed in a category should have been assigned to a temporary category called "Imported Products". Using the Control Panel you can create a new category and assign multiple products to it at once. You can also modify category assignments from the *Modify Product* page.

"Undoing" the last product import/update

ProductCart now allows you to easily "undo" an import/update by reverting back to the data that was stored in the product database before new data was imported or updated. For example, let's assume you decide to update the price of 100 products by importing a file that contains the SKU and the new price. You then realize that the price update should have been applied at a later time. How can you go back to the original price for the time being? The "undo" feature allows you to quickly restore the original prices.

When products are imported or updated, ProductCart saves a log of what information was imported in the files *importLogs/prologs.txt* (product information) and *importLogs/catLogs.txt* (category information). The system uses this information to remove the data that was imported/updated.

To "undo" the last import/update, select *Import Wizard* from the *Manage Products* menu, and then click on the *Undo Last Import* or *Undo Last Update* button. Note that the button is only visible once you have imported or updated products. The "undo" can only be applied to the last import or update. It cannot be applied to previous imports or updates.

Note that this feature is <u>not</u> a substitute for backing up your store database before importing or updating data. Backing up your database remains the safest way to ensure a quick recovery in case the database is compromised during an import or update procedure.

Product Wizard

The Product Wizard allows you to add a new product to your store's product catalog. Because the Wizard takes you step by step through the process, it is particularly useful when you are just starting out using ProductCart. It's a good idea to use the Wizard to add your first few products to the catalog, especially if you are not a technically savvy computer user.

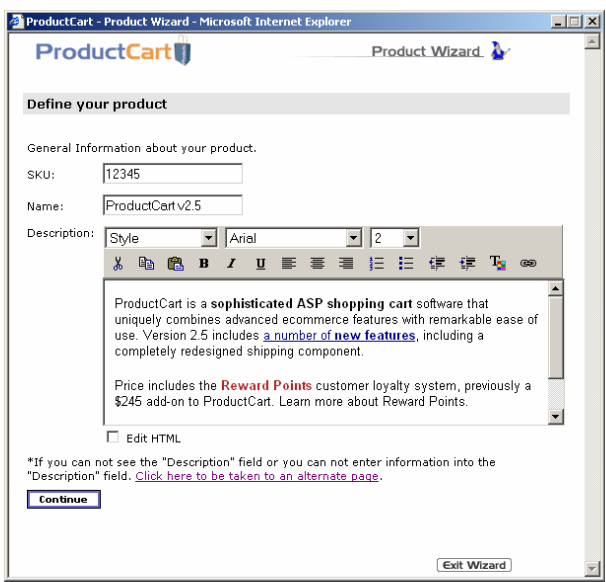
However, there are several product settings that cannot be configured using the Wizard. For example, you cannot use the Product Wizard to set up a Downloadable Product.

When you become more familiar with ProductCart, or if you are a more technically savvy user, you will want to add a product to the store using the *Manage Products/Add New Product* feature, which is described in detail later in this chapter.

Below is a brief description of the features that you will find on each of the Wizard's screens.

Define Your Product

- **SKU**: Enter your product SKU, which is typically a combination of letters and numbers.
- **Name**: This is the product name (Max 255 characters)
- **Description**: Enter the product description. You can use the editing tools to add formatting styles to the text. Note that when you format the text you are actually using HTML tags, so that the formatting is correctly interpreted by the browser. Click on "*Edit HTML*" to view the HTML tags and edit them manually.



Pricing Information

- **On-line Price**: This is the price that your store visitors will pay. You do not need to type in the currency sign. Just enter the price digits.
- **List Price**: This is an optional, but very useful field. Enter a value here if you want to use the *Show Savings* feature. The difference between the list and the online price will be

shown and the *list price* will be displayed stricken through, just like you see on large e-commerce sites such as Amazon.com®. Of course, make sure the *list price* is higher than the *on-line price*.

- **Wholesale Price**: This is also an optional field. This is the price displayed to wholesale buyers and used to calculate their order totals. You can define which users are wholesale buyers under *Manage Accounts*. See the section of this user guide dedicated to that topic for more details.

Product Images

- The Wizard will ask you if you have images for this product. See *Getting Ready To Add Products* for details about image sizes and formats. You have the ability to add up to 3 images for each product.
- First, you will upload the product **thumbnail**. This is the smallest image, which is displayed when a store visitor browses through your product catalog (recommended size: smaller than 100 x 100 pixels). *Browse* your computer until you locate the file, then click on *Upload* to automatically upload it to your Web server. You will receive a confirmation message indicating that the upload was successful. Click *Continue* to upload a large image, or *Finished* to stop uploading images.
- The **standard (general) image** is displayed on the product details page (recommended size: smaller than 200 x 200 pixels). The upload process is the same as described above.
- The **detailed view image** is an even larger image of the product. If the image is uploaded, then store visitors will be able to click on the standard image on the product details page to view the larger image. The upload process is the same as above.

Product Category

Next, it's time to specify which category this product belongs to. If have previously created categories for this product catalog, simply select the right category from the drop-down menu, and click *Continue*.

Otherwise, you will first need to create the category that this product belongs to.

- Click on the link to create a new category
- Enter a category *Description* (which is the category name)
- Specify which category this subcategory belongs to from the drop-down menu. If this is not a subcategory of any other category, select "Root" from the drop-down menu. Then click *Continue* to assign the product to this category.

Set as Special

The Wizard will then ask you if you want to set this product as a special. You can set any item in your product catalog as a *Special*. This gives you the ability to promote certain products in your on-line store. All *Specials* are displayed in a special page that you can link to from any other page on your Web site.

For example, many Web stores link to the Specials page right from their home page. Also, *Specials* can automatically be displayed on the store's home page. You can set a product as a *Special* at any time, so you don't have to do this now if you are not sure which products you will be promoting.

Shipping & Inventory

On this page you can configure shipping and other options for the product. First indicate whether this product will be shipped or not. If so, enter a weight for the product. If you want, you can offer free shipping on this product (e.g. as part of a promotion). To do so select the corresponding check box. If the product is not subject to sales tax, check that option. Finally, enter an inventory level for the product if you wish to use the inventory management component of ProductCart and, for instance, prevent customers from buying a product that is out of stock.

Preview, Edit and Save

Product Wizard will now show you a summary of the settings that you have specified for the product. If you are satisfied with the summary, click on *Save* to add the product to the catalog. If you need to edit any of the entries, click on *Edit*, make the changes and click on *Update*.

Now, give yourself a pat on the back – you've used the Product Wizard to add a new product to the product catalog! There is another way to add products to the catalog, which we've described in the next section.

Adding New Products

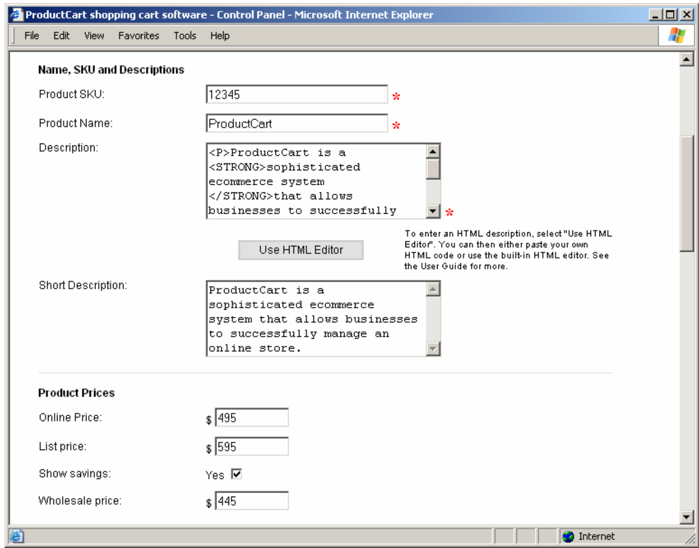
There are four ways to add a new product in ProductCart:

- Using **Product Wizard**, as discussed in the previous section. Product Wizard is especially helpful when you are first getting started with ProductCart. As you become a more advanced user of this product, you will probably tend to use the *Add New Product* page, discussed in the next section. Many product options are not included in the Product Wizard and can only be set using the *Add New/Modify Product* pages.
- Using the **Add New Product** feature to add an entirely new product.
- **Cloning** an existing product.
- Using the **Import Wizard** (see the earlier section in this chapter)

Adding an Entirely New Product

Adding a new product to your catalog can be a one, two, or three-step process depending on how much information you need to provide. First, use the *Add New Product* form to define most product details. Then, on the confirmation page that will be displayed, select *Add Product Options* to define additional product information such as sizes, colors, etc., if any apply. From the same page, or from the *Modify Products* page, select *Custom Fields* to add and edit custom fields for the product, such as input text fields or custom search fields, which are covered later in this chapter.

The following is a brief description of the form fields contained on the *Add New Product* page.



- **SKU** - Enter the product SKU or Part Number, which typically is a combination of letters and numbers. Note that the database will also automatically add to each product a unique *Item Number*, which is not displayed on this form. The *Item Number* uniquely identifies the product in ProductCart's database. The SKU, instead, is your own product identifier. The maximum number of characters that can be entered in this field is 50 for stores powered by an Access database, and 100 for stores powered by a SQL database (alphanumeric characters).

  ProductCart does not enfore unique SKUs. However, if you enter a SKU that has already been assigned to another product, the system will notify you. It is then up to you to decide whether to modify the product and replace the SKU with a unique one or keep the existing one.
- **Product Name** - Enter the product name. The maximum number of characters that can be entered in this field is 100 (alphanumeric characters).
- **Description** - Enter a description for the product. This is the description that will be displayed to your store visitors when they opt to receive more details on a certain product. For example, if they run a product search, the shopping cart will return N items on the search results page. If they click on *More Details* next to any of the items, they will be shown a page that displays the product description that you are entering here (together with the *general image* and other product information). The database allows an unlimited number of characters for this field (both Access and SQL).

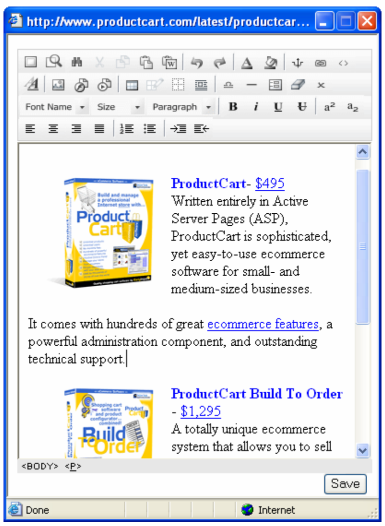
  If you enter a short description for the product, the long description is shown at the very bottom of the product details page. The short description is shown at the top of the product details page, and a text link to the long description is added automatically at the end of it. An example of how short and long descriptions are shown on the product details page is located at the end of this chapter.

  You can use any **HTML tag** to format the text in this field. For example, you can use the **word** tag to make a word bold. This also allows you to link to other pages on your Web site, display additional product images, etc. To enter an HTML description, click on the *Use HTML Editor* button. You can then either paste your own HTML code or use the built-in HTML editor.

1. ProductCart v2.75 uses an advanced HTML editor published by InnovaStudio (http://www.innovastudio.com/editor.asp). This complete HTML editor contains a large number of features. Covering all of them is beyond the scope of this User Guide. You will find detailed product information on the InnovaStudio Web site (for example, see the tutorials listed on the following page: www.innovastudio.com/editor_tutorial.asp). Without knowing any HTML, you will be able to create professional looking product descriptions for you store. You can use the built-in HTML editor similarly to any Word processing application that you are used to.

   Note that you don't need to set font type and color when you create a product description, since ProductCart allows you to set a font type for your entire store using the *Display Settings* feature under *General Settings*. Keep in mind that if you set any font properties here, they will take priority over your store-wide settings.

   The following is a sample product description.



2. In the example above, the right screen contains the exact same description as the left screen. All we did was check the *View Source Code* option located in the top-right corner of the toolbar (the "<>" button). The HTML editor will load a separate window called *Source Editor* where you will see the HTML code associated with your description.

   Use this feature not only to edit any of the code manually, but also to **paste code from your favorite HTML editor**. We recommend that you do not paste HTML code directly into the product description field, since that could cause some conflicts. The HTML editor will validate the HTML code that you paste into its window, and format it so that conflicts are avoided. After you have edited or pasted your code, click on *Apply* to see the changes reflected in the main window. Click *Ok* to close the *Source Editor* and return to the main window.

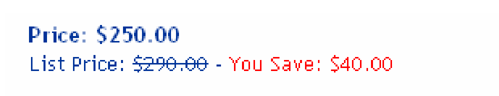
   Save your work by clicking on the *Save* button. You will be returned to the *Add New Product* page, where you can continue configuring the rest of the product settings. Generally speaking, you should avoid pasting complex HTML code into the product description field because it could generate conflicts with the rest of the code generated by ProductCart.

- **Short Description**. The short product description is an optional field that can help customers more easily browse the store. As mentioned in the Display Settings section of this User Guide, the short product description is shown in many of the browse & search pages. It is also displayed at the top of the product details page, with a link to the long description. This ensures that all relevant buttons (e.g. *Add to Cart*, *Add to Wish List*), menus, and fields (e.g. option menus and custom input fields) are displayed at the top of the page. If the short description is not present, the long description is shown at the top of the page, and no product description is shown on the browse/search pages.

  Although you can use HTML tags in the short description, you should not use complex HTML tags there because of the location of the short description throughout the store and the conflicts that it could create with the surrounding code. In fact, if possible, you should limit the use of HTML code to basic tags such as <b>, <i>, and alike.

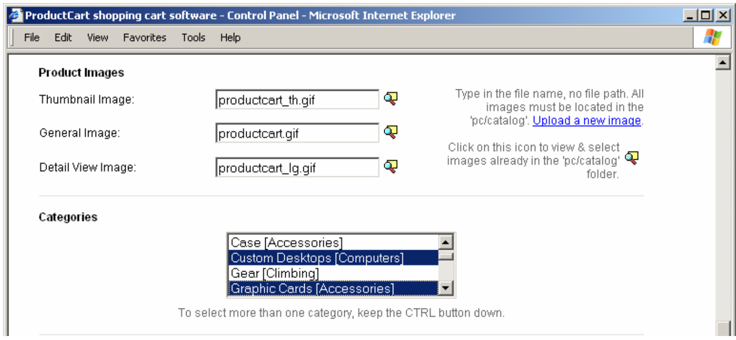
- **On-line price** - Enter the price you will be charging your retail customers. You can automatically charge wholesale customers a different price (*see below*). The online price is a required field.
- **List price** - Enter the list price for the product. This is an optional, but very useful field. If you enter a price here, then you can use the *Show Savings* feature described below. Note: make sure the *list price* is higher than the *on-line price*.
- **Show savings** - If you check the *Show Savings* option, your store will show your price, the list price (stricken through), and display the difference between them after the words "Online Savings:". Prices are displayed below the product description.

  Below is an example of how this is displayed on a product details page.



- **Wholesale Price**: This is also an optional field. The field defines the price that is displayed to wholesale customers and used to calculate their order totals. You can define which store visitors are wholesale customers under *Manage Accounts*. See the section of this user guide dedicated to that topic for more details. Wholesale customers are automatically shown the wholesale price.

  You can use the *Global Changes* feature to quickly assign wholesale prices to multiple products if the wholesale price is a function of the online or the list price.



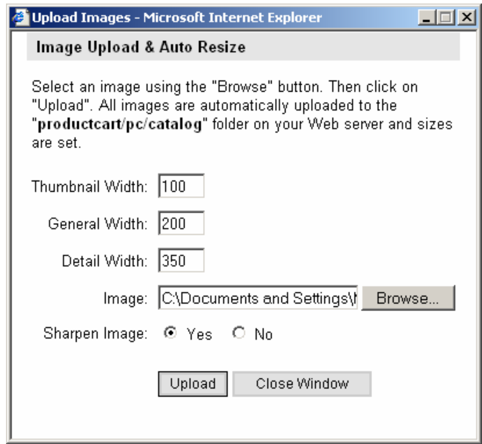
- **Thumbnail image** – Recommended size: smaller than 100 x 100 pixels. Enter the thumbnail image file name and extension. Do not enter any directory path, just the file name (e.g. "myimage.gif").
- **General image** – Recommended size: smaller than 200 x 200 pixels. Enter the file name for the product's general image. Make sure that the image has been uploaded to your server, as described above.
- **Detailed view image** - Enter the file name for the product's detailed view image. Make sure that the image has been uploaded to your server, as described above. If you specify a *Detailed View Image*, a zoom button is shown on the product details page, below the *General Image*. When a customer clicks on it a new window pops up and resizes itself automatically to properly display the new image.

About uploading product images

ProductCart assumes that images for the product that you are adding have already been uploaded (or will be uploaded) to your server. All images must be uploaded to the directory *productcart/pc/catalog*. There are three ways to upload an image to ProductCart:

1. Upload previously edited images via the *Upload Images* feature. Refer to *Getting Ready to Add Products* for details about image sizes and formats. If you haven't already uploaded images to your server, you can do so by using ProductCart's automatic upload component, accessible either by selecting *Upload Images* from the *Manage Products* menu, or directly from the *Add New Product* form, through the text link next to the image fields. To upload images using this component, *Browse* your computer until you locate the file(s). You can repeat this task for up to 6 images at the same time. When you are done locating the file(s), click on *Upload* to automatically move them to the right directory on your Web server. You will receive a confirmation message indicating that the upload was successful. For security reasons, you cannot upload any files other than JPEG and GIF images. If you attempt to upload any other files, you will receive an error message.
2. Upload previously edited images via FTP. To upload images to your server you can also use any **FTP** program. Many are available in the market, often free of charge. In addition, your Web hosting service provider may have some for you to download as well. For a list of good FTP programs available for download, run a search for "ftp" on http://www.download.com
3. Upload unedited images and automatically resize & save them. This utility allows you to take one image, and **automatically create the thumbnail, standard, and detail view images** for your products (it also works with category images). This feature can save you a significant amount of time when adding new products and categories to your store.

When adding, cloning, or editing a product, select the upload & resize text link to load the pop-up window shown below.

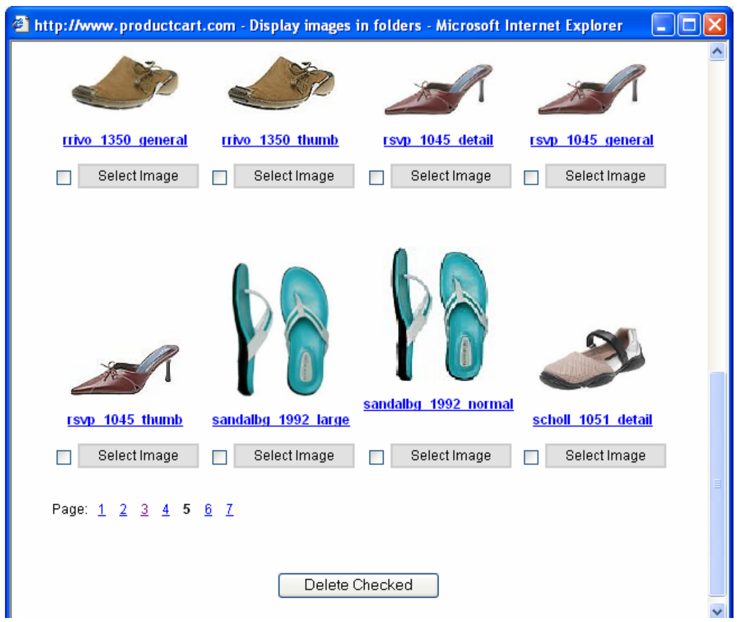


- Enter the width for the thumbnail image (100 pixels or less recommended)
- Enter the width for the general image (200 pixels or less recommended)
- Enter the width for the detail view image (any size). Note that if the source file's physical width is smaller than the width you enter in this window, your entry will be ignored and the image will not be resized.
- Select an image file (GIF, JPG, JPEG, JPE) on your system using the *Browse* button. If your server has AspImage installed, GIF files are not supported.
- Select whether or not you would like to sharpen the image after resizing it.
- Click on the *Upload* button to start the upload & resize process. A progress bar will show you the file being uploaded to the server. When the process has ended, you will be shown the three new image file names, hyperlinked to the images themselves. Click on any of the links to see the images. At the same time, ProductCart has also populated the three image input fields on the page with the newly created file names. Close the window to return to the page and complete the rest of the *Add New Product* form.

Behind the scene, the upload & resize utility performs the following tasks. (a) Uploads the source image to a temporary directory in the *productcart/includes* folder called *uploadresize*. The source file is automatically deleted from this folder after these tasks are completed. (b) Creates the three files mentioned above, adding a descriptive suffix to the file name to differentiate them. The files are then saved to the *pc/catalog* folder. (c) Copies the file names to the input fields on the page from which the utility was launched (i.e. add/clone/modify product pages).

Note (system requirement): Please refer to the System Requirements section of this User Guide for details on the server components that must be installed for on your Web server for you to take advantage of the Upload & Resize feature.. When this server component is not detected, ProductCart automatically hides any link to using the utility.

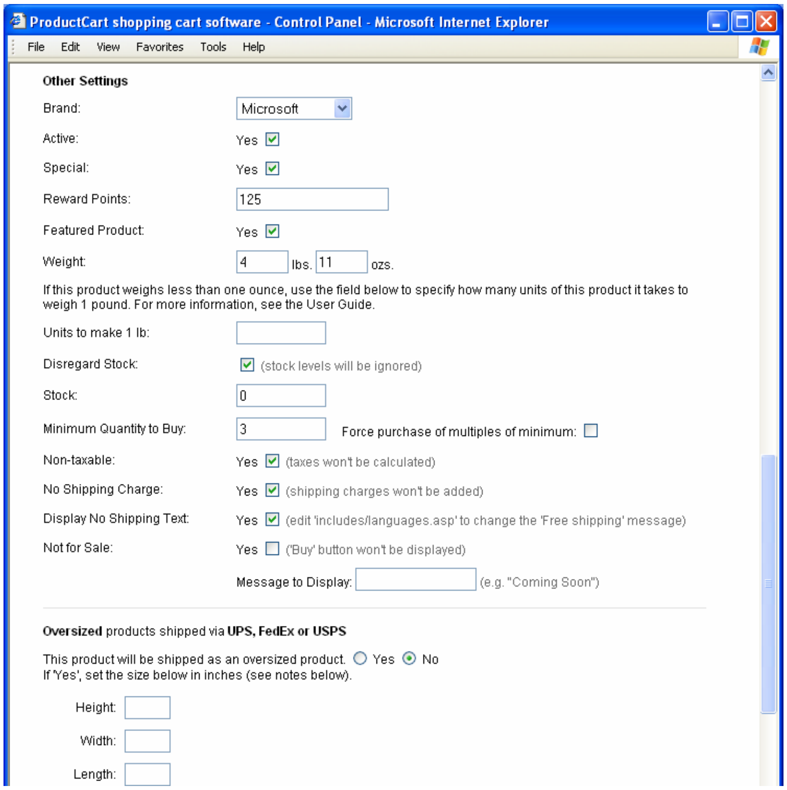
If you know the image that you would like to use for any of the image fields is already on the Web server (e.g. you already used it for another product, or you transferred all of your graphics already via FTP), click on the search icon to graphically browse through the images in a pop-up window. The pop-up window will ask you how many images to display per page, and whether or not you want to display the actual image or just the file names. The script loads all compatible graphics located in the *pc/catalog* folder, sorted alphabetically, and automatically resized to 100 pixels in width (if larger). To view an image's actual size, click on the file name. To copy the file name to the selected image field, click on the *Select Image* button. To delete any of the images from the server, check the corresponding box and then click on *Delete Selected.*



- **Category** - To give you maximum flexibility, ProductCart allows you to assign a product to multiple categories. A product can belong to unlimited categories, but it must belong to at least one. Make at least one selection from the *Categories* field. To select more than one category, press the CTRL key on your keyboard as you select categories using your mouse.

  You can also, easily assign the product to other categories after saving it to the product catalog. For example, a gift shop could have the same poster appear under "Posters" (first category) and under "Home Décor" (second category). To manage categories and subcategories, see *Create and Modify Product Categories*.

  Once you have added the product to the store, the quickest way to assign it to multiple categories is to modify the product by selecting *Details* after locating the product in your catalog. On the page that is displayed, scroll down to the middle of the page where the category assignment is shown, then click on *Edit Category Assignment.* A pop-up window will allow you to easily check or uncheck the categories that the selected product should be assigned to or removed from. When you are done, click on *Update* and you will be returned to the product details page.



- **Brand –** If you are using brands on your store, here you can assign the selected product to a brand by choosing a brand name from the drop down menu. If no brands have been setup on the store, this field will not be displayed. The best way to assign multiple products to a brand is by using the *Manage Brands* feature under *Manage Products*. For more information, see the Managing Brands section later in this chapter.
- **Active -** All products are active by default. If you uncheck this option, the product becomes inactive, and will not be shown in your store. It will still show up in the Control Panel (so that you may reactivate it at any time), but it will stop being displayed in any search and/or catalog page. Make sure that you have not placed hard-coded links to this particular product on any other page of your Web site.
- **Special -** You can set any item in your product catalog as a *Special*. This gives you the ability to promote certain products in your on-line store. All *Specials* are displayed in a special page that you can link to from any other page on your Web site. For example, many Web stores link to the *Specials* page right from their home page.

  For more information about how to link to the *Specials* page from any other page on your Web site, see *General Settings / Generate Links*.

  To set multiple products as *Specials* see *Discounts and Promotion / Specials and Featured Items*.
- **Reward Points** – Enter the number of *Reward Points* associated with this product. You can easily assign Reward Points to multiple products at once using the *Reward Points* feature, which is described in the *Discounts and Promotions* section. This field may have a different name if you have renamed *Reward Points* to something else (e.g. My Store Miles). Please see the *Reward Points* section for more information about this feature.

- **Show on Home page** - Feature products are automatically shown on ProductCart's default home page for your store. It is up to you whether to use or not this page, and you can change the products set as featured at any time from the *Specials and Discounts* menu. Refer to that section of this manual for more information on featured products. Visit the Developer's Corner on the ProductCart Support Center for other ideas about how to use Featured Products to build custom home pages for ProductCart.
- **Weight** - Enter the product's weight, in pounds and ounces (kilograms and grams if you store is setup to use Kg). The weight can be used for dynamically calculating shipping charges. For information about configuring shipping options see *Shipping Options*. If you set the weight to zero, then customers will not be prompted to select a shipping option during the check out process (except for custom shipping options that are not based on the order weight). Depending on how the store was originally configured during activation, the weight can be entered as pounds and ounces, or as kilograms and grams. Technically speaking, the weight is saved to the database in one field, as ounces or grams. If you are importing or exporting product data, you will only see one value associated with the product weight.
- **Units to make 1 lb** (or 1 Kg) - If this product weighs less than one ounce or less than one gram, use this field to specify how many units of this product it takes to weigh 1 pound or 1 kilogram. This feature allows you to properly calculate the order weight when a single unit of the product weighs less that the lowest weight unit accepted by ProductCart, which is 1 ounce or 1 gram. For example: how heavy is a business card? There are many products that have a weight that is smaller than an ounce or a gram.

  In the field, enter the number of units of the product that will weigh one pound or one kilogram. For example, assume that 250 business cards weigh 1 pound. You would enter 250 in the field. When a customer orders 2,000 business cards, ProductCart will know that the total order weight is 2,000 : 250 = 8 lbs.

  Use this feature in conjunction with the *Validate for multiple of N* setting to ensure that customers order at least N units of the product.
- **Disregard Stock** – This option allows you to prevent general inventory settings to apply to the selected product. For example, if your general inventory settings do not allow the purchase of an out of stock item, checking this option would allow a customer to purchase the selected product even if the inventory level is 0 or negative.
- **Stock** - Enter the current stock level for this product. This is an optional field, which can help you manage your inventory. If a product is out of stock and you have selected the *Show Out of Stock* option under *General Settings/Store Settings*, then the product details page on your store will display an "Out of stock" message.

  Use the *Store Settings* page to set general inventory settings, such as whether or not inventory levels should be shown on the product details page, whether out of stock merchandise can be purchased or not, and whether an out of stock message should be displayed. In other words, you can have your store accept orders even if a product is out of stock: it's up to you to decide how to handle that scenario.
- **Minimum Quantity to Buy** – Enter a number if you want to set a minimum purchase quantity for the product. The quantity field on the product details page, which normally contains a "1", will automatically be set to the selected quantity. Validation is performed throughout the storefront to ensure that the customer can only purchase the product in an amount that equals or is higher than the number of units you specify here.

- **Force purchase of multiples of minimum** – This setting tells ProductCart that the product can only be purchased in set quantities, and that those quantities can only be a multiple of the minimum purchase amount. For example, let's go back to the "business cards" example that we were referring to above. You will probably not sell customers 4 business cards, but rather require that they purchase at least a few hundreds. In addition, you will not want a customer to order 302 business cards, but rather a more easily manageable multiple of, let's say, 50 (i.e. 300, 350, 400, etc.). In this scenario you would want to enable this option and enter 50 in the *Minimum Quantity to Buy* field.
- **Non-taxable** – If you check this option, taxes will not be calculated on sales of this product or service. Taxes will still be added to the total of the order if the shopping cart contains other, taxable products. This is very useful, for example, in a scenario in which your online store sells both products and services (e.g. training material and training seminars). You'll need to charge taxes on the product sales, but not on the services. Typically, digitally delivered products are non-taxable, so you will likely want to check this option if you are adding a Downloadable Product to the store.
- **No Shipping Charge** – If you check this option, shipping charges will not be added for sales of this product or service. If this is the only product in the shopping cart, the shipping rates selection page will not be shown. You can use this feature to set up a special promotion on a product. For example, you could decide not to charge any shipping on the featured products on your store's home page.

  If this option is unchecked, but the product's weight is set to zero, shipping charges that are based on the order weight will also not be shown during checkout. Note that this setting applies to all shipping charges based on the product's weight. If you would like to configure individual shipping services for "free shipping", please consult the *Shipping Options* section.

  If the product that you are adding to the catalog is a Downloadable Product, delivered only electronically, then you should check this option so that the shipping rate selection page is skipped during checkout.

  When this option is set to *Yes*, the product's weight is not counted in the computation of the order's total weight. This means that if a customer purchases a free shipping product together with a product that is not setup for free shipping, the customer is only charged shipping for a portion of the order.
- **Display No Shipping Text** – Related to the feature described above, this option allows you to display a text string on the product details page that indicates that no shipping charges will be applied to the purchase of this product. The message displayed on the page can be edited by modifying the corresponding text string in the file *includes/languages.asp*. See Appendix C for more information.
- **Not for Sale** – That are many reasons why you may want to display a product in your catalog, but not allow store customers to order it. For example, the product could be "Coming Soon", or "Discontinued", or available for sale only through telephone orders. Check this option if your product falls in these or similar categories.

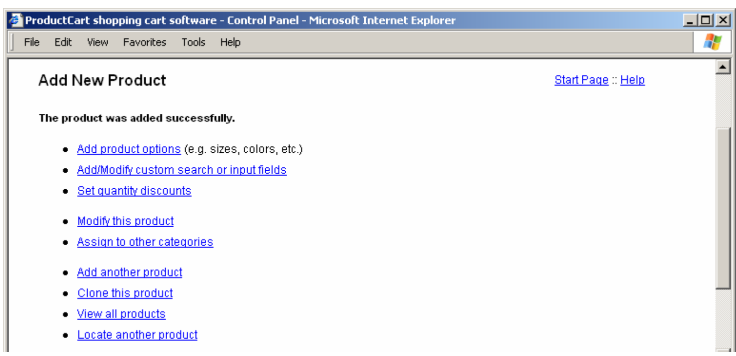
  When this option is checked, the "Add to Cart" button will not be displayed. In addition, ProductCart will not show product options, custom input text fields, and the quantity field. Instead, the text that you enter in the "Display Text" input field will be displayed (e.g. "Call us to order this product", or "Coming Soon", etc.). The difference between a

"Not for Sale" product and a product that is "Inactive" is that an inactive product will not be displayed at all in the catalog, but "Not for Sale" products will.

- **Oversized products**. Setting a product as *Oversized* makes ProductCart replace the default package size with the package dimensions entered here. Please see the *Shipping Options* section for more information about entering default package dimensions for your shipments. For now, note that "length" should always be the longest dimension.

  In some cases (e.g. UPS), oversized items incur extra shipping charges. However, if you set a product as *Oversized*, but the actual package weight and size do not fall into the *oversized* category, the shipping provider will return the correct rate.

  Another consequence of enabling the *Oversized* option is that when you set an item as oversized, it will automatically be handled as a separate package when calculating shipping charges. ProductCart v2.6 and above allow you to handle multiple package shipments to more accurately calculate shipping rates on your orders.
- **Downloadable Product Settings**. Please see the Downloadable Products section of this chapter for more information about this feature.



Click on the *Add* button to add the product to your catalog. A confirmation page will be displayed. From this page, you can perform a number of tasks, which are listed below.

- Add/Modify product options – Click on this link to add new options to the product (e.g. sizes: small, medium and large), and view/edit existing options.
- Add/Modify custom search or input fields – This link will take you to a page where you can add new custom search or input fields, or view existing custom fields for this product. Custom fields are the object of a separate section later in this chapter.
- Set quantity discounts – Click on this link to be taken to the section of the Control Panel where you can add/edit quantity discounts for your products.
- Modify this product again – This link will take you back to the previous page so that you may edit the product again. If you have added a Downloadable Product to the store, click on this link to load the *Modify Product* page, which contains a *Test license generator* that will allow you to test the process of generating a license for the selected product.
- Assign to other categories – Click on this link to be taken to the *Manage Categories* area, where you can assign or remove this and other products from a category.
- Add another product – Loads an empty *Add New Product* form.

- Clone this product - Loads an Add New Product form pre-filled with the current product's data. This feature allows you to quickly add a product similar to the one you just added to the store catalog.
- View all products – Use this link to modify another product in your store.
- Locate another product – Loads the search page that allows you to locate a product in the store. If a product search has already been performed during the same browser session (i.e. since the last time you logged into the Control Panel), then those search results will be shown to you again. Otherwise, the *Locate a Product* page will be shown.

Adding a Downloadable Product

ProductCart has the ability to flexibly handle the sale of electronically delivered products. We refer to these products as *Downloadable Products* or *Digital Products* (DP). What is common among all downloadable products is that a download link must be delivered to the customer once an order has been processed. Publishers of digital products are typically concerned about delivering the download URL to the customer due to the fact that the link can be easily provided to other, unauthorized users.

Companies often protect themselves from the unauthorized download of a digital product by adding barriers to the use of the product after it has been downloaded. For example, many software applications require the user to enter a valid License Key or Serial Number upon installation.

ProductCart attempts to address both security concerns (unauthorized download and unauthorized use after the download has taken place), through the following features:

- Hidden URL – ProductCart uses server-side file buffering to hold the file in a virtual, temporary location while it is being downloaded. Because the file is not downloaded from its actual location, the location of the file on the Web server is completely hidden. When the download begins, a pop-up window will be shown, which will allow the customer to save the file to their computer. The file name is also shown, but the physical location of the file on the server is not provided.

  Note – Limited Applicability of Hidden URL feature. The latest version of Microsoft® Internet Information Service (IIS 6) contains a structural limitation to server-side file buffering. Only files that are smaller than 4 MB in size can be buffered. This limits the applicability of the *Hidden URL* feature only to files that are smaller than 4 MB on servers that use IIS 6. If your Web store is hosted on a Web server that runs IIS 6, you have two options: (1) contact the hosting company about the possibility of changing this limitation to a larger file size; (2) enter a HTTP location for the downloadable file, rather than a physical location: when you do so, ProductCart automatically ignores the *Hidden URL* feature when generating the download link. If you enter a physical path to a file larger than 4 MB on a server running IIS 6, when you click on the download link a 0 K file will be downloaded (the file was not buffered).

- Expiring URL – The download link provided to customers (e.g. thru confirmation emails, pages containing details about previous orders, etc.) never points to a file. Rather, it contains code that allows ProductCart to locate the file that needs to be downloaded, and check whether or not the customer's eligibility to download the file has expired. In other words, you can set the download URL provided to a customer to expire after N days (each download URL provided to any customer is unique). If a customer clicks on a link that has expired, the file download process is never started. So regardless of whether or not the *Hidden URL* feature mentioned above is in use on the store, the file location cannot be determined. This security measure attempts to limit the damage that a digital product publisher would suffer in scenarios such us a URL being illegally sent to multiple individuals via e-mail or posted on a Web page without authorization. Even if the URL is posted on a Web page without authorization, it would be rendered useless after the N days have passed.

- License Delivery – A license containing up to 5 pieces of information can be delivered to the customer with the purchase of a Downloadable Product. Many publishers of digital goods protect the unauthorized use of their products by requiring that the customer enter some type of unique license upon installation (e.g. software) or fruition of the product. Since the type of license needed to unlock/use a digital product varies dramatically from product to product, and from publisher to publisher, the Downloadable Products Module (DPM) within ProductCart was engineered to be as flexible as possible with regard to how license information is generated. If more than one Downloadable Product is included in an order, a license is separately generated for each item and included in the order confirmation e-mail (e.g. an order for two different software applications). If more than one unit of the same Downloadable Products is included in an order, a license for each unit of the product is generated and included in the order confirmation e-mail (e.g. three licenses of the same software application). For more information about how a license is generated, please see Appendix I.

The settings mentioned above can be configured on a product by product basis when adding a new product to the store. So let us review exactly which settings apply to Downloadable Products.

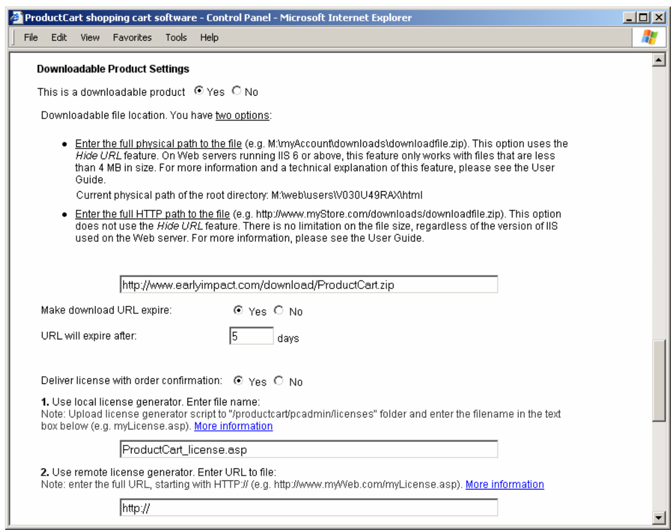
To add a Downloadable Product to your store, select the *Add New Product* feature from the *Manage Products* menu. At the bottom of the page, notice the radio button *This is a downloadable product*. Select *Yes*, and a number of new fields will appear. Here is a description of each of them:

- Downloadable file location. You have two options:
    - Enter the full physical path to the file (e.g. M:\downloads\downloadfile.zip). This option uses the *Hidden URL* feature. On Web servers running IIS 6 or above, this feature only works with files that are less than 4 MB in size, as mentioned earlier in this section. To help you determine what the full path to the downloadable file may be, ProductCart shows the current physical path to the root directory where the Web site is located on the Web server.
    - Enter the full HTTP path to the file (e.g. http://www.myStore.com/downloads/downloadfile.zip). This option does not use the *Hidden URL* feature. There is no limitation on the file size, regardless of the version of IIS used on the Web server. The URL to the file is never included in confirmation e-mails or on the page that contains previous order information. Rather, an encoded download link is used, in conjunction with the URL expiration feature. However, if the URL has not expired, when customers click

on that link and the download process is started, some browsers do show the full HTTP path to the file, which can represent a security concern for some online stores. For example, Internet Explorer does not show the full URL to the file, but Netscape 7 and Opera do.

Use the *Verify Download URL* button located at the end of the page to verify that the file location you just entered is correct.

- Make download URL expire. As mentioned above, you can decide whether or not the URL delivered to the customer will expire after a certain number of days. If you leave the check box set to *No,* the URL will never expire. Enter the number of days (positive integer) in the following input text field, labeled URL will expire after.



- Deliver license with order confirmation. Is a license required for installation and/or use of the product? If the answer is yes, ProductCart can assist you in delivering license information to your customers. Please refer to Appendix I for a technical overview of how this is achieved. Here, you can set the system to deliver or not deliver a license when this Downloadable Product is purchased, and indicate where the license file is located.

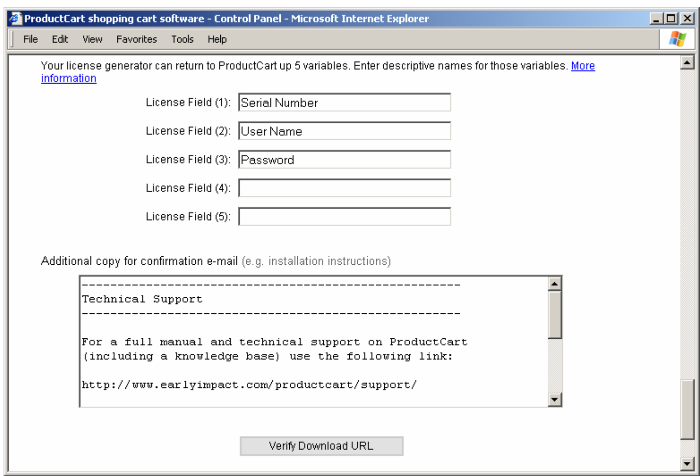
- Use local license generator. Enter the file name of the ASP file to be used to create a license for this file (e.g. myLicense.asp). The file must be located in the *productcart/pcadmin/licenses* folder. ProductCart refers to this file as the *License Generator*. See Appendix I for information about how this file should be structured.

- Use remote license generator. The license generating ASP page can also reside on another server. If that is the case, enter the full URL, starting with HTTP:// (e.g. http://www.myWeb.com/myLicense.asp).

- License Field Descriptions. Your license generator can return to ProductCart up to five variables. Please refer to Appendix I for a technical overview of how this is achieved. Here you can enter descriptive names for those variables. These are the names that will be associated with the variables' values when the license information is delivered to the customer (e.g. order confirmation email, previous order details page, etc.). Leave the field(s) blank if you do not plan to use it. For example, if your product license is made of three pieces of information (e.g. Serial Number, User Name, and Password), you would enter the corresponding descriptions in the first 3 fields, and leave the other 2 blank.

License Field (1): Serial Number
License Field (2): User Name
License Field (3): Password
License Field (4):
License Field (5):

- Additional copy for confirmation e-mail. Here you can enter information that may be useful to your customers to install/activate/use the Downloadable Product that they have just purchased. The information is displayed at the bottom of the order confirmation e-mail sent to the customer when the order is processed, below the license(s), if any, delivered with the product download URL. Do not use HTML tags in the copy. If you need to place a hyperlink in the copy, simply enter the full URL and most e-mail clients will reformat it to a hyperlink automatically. The same is true for e-mail addresses.



As for the fields discussed earlier in this chapter, which apply to all products, note the following settings that typically DO NOT apply to a Downloadable Product:

- Weight - The weight is typically set to zero since a physical product is not shipped to the customer. You can certainly specify a weight other than 0, and leave the *No Shipping Charge* option unchecked if you are adding to the store a product that will be made available to customers BOTH via electronic delivery (download URL), and through the shipment of a physical good, and you therefore need the customer to select a shipping option and shipping charges to be added to the order.

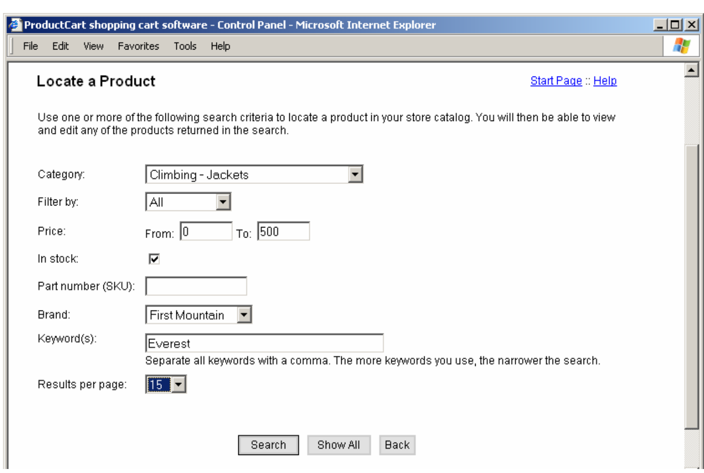
- Disregard Stock – Check this option to ensure that the product is available for sale even if the stock level is 0 or negative. If the product is also shipped to the customer (e.g. software program that is also shipped in a box), and you want to prevent the purchase of out of stock item, then you will need to leave this option unchecked.

- Stock – You do not need to specify an inventory level for the Downloadable Product unless the product is also physically shipped to the customer and you want to track inventory for it.
- Non-taxable – Products that are delivered electronically are typically non-taxable. Please check with your local tax authority to confirm that this is indeed the case in your tax jurisdiction. If the product is also shipped to the customer (e.g. software program that is also shipped in a box), then this option should be left unchecked as the product is likely taxable.
- No Shipping Charge – This option is typically checked so that the shipping rates page is not shown during checkout. See the note above for the scenario in which the product is also shipped to the customer (e.g. software program that is also shipped in a box).
- Display No Shipping Text – Since a Downloadable Product is typically not shipped, rather than being shipped at no charge, the free shipping text should not be displayed, and therefore this option should be left unchecked.

Locating an Existing Product

ProductCart includes a sophisticated product finder that will allow you to quickly locate products in your store database. Once you do a search, ProductCart will now remember the search results until you instruct the system to perform a completely new product search. This new feature considerably speeds up editing multiple products that were returned from the same search. To see results from the last product search, simply click on the *Locate a Product* link throughout the Control Panel.

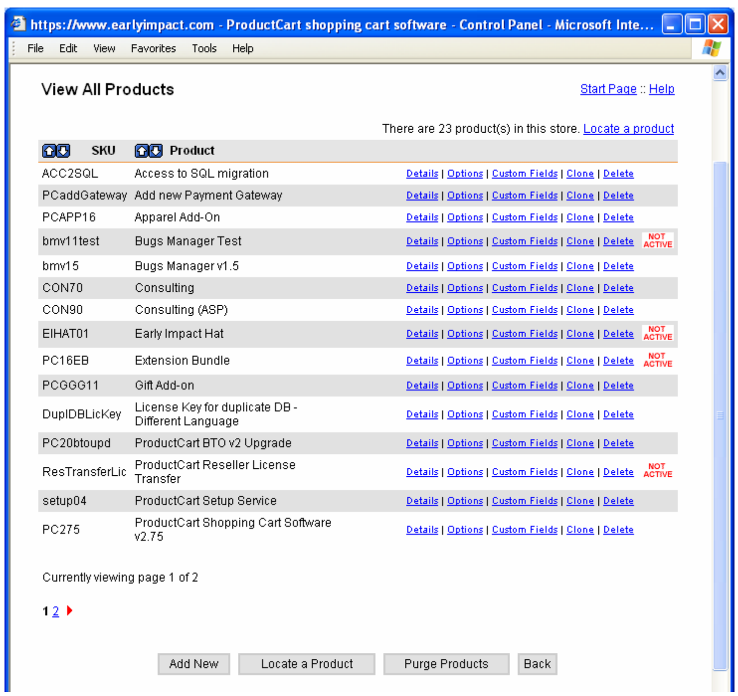
To perform a product search, select *Locate a Product* from the *Manage Products* menu. Use one or more of the search filters displayed on the page to narrow your search. Or you can opt to view all the products that are currently in your catalog.



The filters are:

- Category. If you select a category, the search will only be performed on products that belong to that specific category. Select *All* to search across all categories.

- Filter by. If you have assigned custom search fields to any of your products, the field names will be shown in the drop-down menu. Enter a value in the keyword field to look for products whose custom search field contains that value.
- Price. Enter a price range to filter by price.
- In stock. You can opt to search only products whose stock level is positive.
- Part number (SKU). This field allows you to filter on the SKU field.
- Brand. If you are using brands, then you can filter the product catalog by brand. This field is not shown if you are not using brands on your store.
- Keyword(s). To search a product by keyword, enter one or more keywords here. ProductCart will search both the product name and product description. Separate all keywords with a comma. The more keywords you use, the more refined the search is.
- Results per page. Limit the number of results shown on each search results page by selecting from the drop-down menu.



Click on *Show All* to view all *Standard* and *Downloadable* products stored in the database. The system automatically displays 15 products per page and adds a navigation area at the bottom of the page if additional pages are needed to display all products.

- Select *Details* to view/modify the product
- Select *Options* to configure product options, which are described in the next section
- Select *Custom Fields* to add/view custom search and input fields. This topic is described later in this chapter.

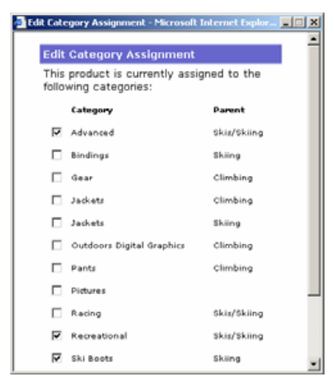
- Select *Clone* to add to the store a product that is similar to the selected product. The cloned product is actually not added to the store until you save the product information that is loaded in the *Add Duplicate Product* page.
- Select *Delete* to remove the product from the Control Panel. The product is not actually removed from the store database, in order not to affect previous order information[6]. However, you will not be able to restore it from the Control Panel. If you plan to use the product again, but do not want it to be available anywhere in the store, what you should do is to make the product *Inactive*. See the section about *Modifying a Product* later in this chapter for more information. When the product is inactive, a message is shown next to it. Inactive products are not shown in the storefront.
- Click on the *Purge Products* button at the bottom of the page if you wish to completely remove one or more products from the database. As mentioned above, when you *Delete* a product you are not actually removing it from the database, from rather only from the storefront and the Control Panel, so that previous order information is not compromised. However, if you want to completely eliminate products from the database, you can use the *Purge Products* feature. Only the store administrator has access to this feature. Other Control Panel users will not have access to it.

Note for ProductCart Build To Order users: *Build To Order* products and *Build To Order Items* will not be shown when the *Locate a Product* or *View All Products* from the *Manage Product* menu are used. Refer to Chapter 14 for information viewing and managing *BTO* products.

Modifying a Product

You can locate the product that needs to be modified by searching for it using the *Locate a Product* feature, or by viewing a complete list of the products saved in your product catalog, as mentioned above. Once you have located the product, click on *Details* to view and modify product properties such as name, price, wholesale price, product description, images, etc. The form that is loaded is very similar to the *Add New Product* form. Refer to that section of this document for more information on each form field. You can quickly change the same attribute across multiple products by using the *Global Changes* features, which is described later in this chapter.

There are a few differences between the *Add* and *Modify* product pages:



- With regard to the **categories** that the product has been assigned to, the *Modify Product* page lists all the categories to which the product has been assigned. You can easily add or remove categories to the list by clicking on the *Edit Category Assignment* button, which displays a pop-up window that lists eligible categories in your store. A category is eligible to contain a product when it does not contain subcategories (i.e. parent categories are now shown in the list). Click on the check box next to the categories to which you would like

[6] Technically speaking, the product is flagged as removed in the *Products* table (value is set to -1), using the *Removed* field, but it is not actually removed from the database.

to assign this product, then scroll to the bottom and click on the *Update* button.

If you are modifying a Downloadable Product, the *Test License Generator* feature will now be available to you. This feature is not available when you are adding the product to the store as ProductCart first needs to save product information to the database before being able to test the license generator associated with the product.

Duplicating an Existing Product

ProductCart offers you a quick way to add a product that shares most details with another product already in your store catalog. From the *Manage Products* menu, select *View All Products* or *Locate a Product* to view a list of products in your store. On the search results page, locate the product that you would like to duplicate, the click on *Clone*.

All form fields will be populated with the product details associated with the selected product. Change any of the settings, and then click *Add* to save the new product to the database. If you don't change the SKU (part number), ProductCart will still allow you to add the new products, but will display a warning message indicating that the same SKU has already been assigned to another product.

Setting Product Options

ProductCart allows you to add up to two sets of options to each product. These are additional purchasing options that you are offering to your customers on certain products. For example, a product may be available in different sizes, colors, etc. Customers select these options (if any) on the product details page before adding a product to the shopping cart.

If your products have a large number of selectable options, then you should consider using the Build To Order version of ProductCart, which is specifically built for handling configurable products and services. For more information, see Chapter 14.

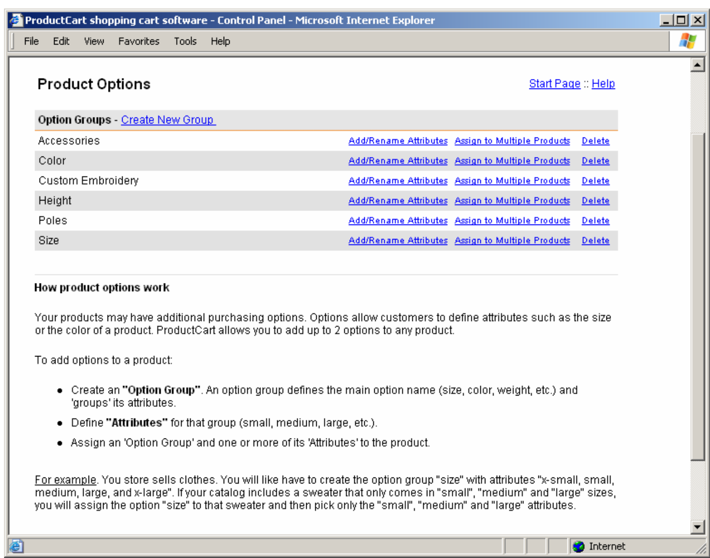
ProductCart gives you a great deal of flexibility in creating and managing product options:

- You can add an option to just one product in your catalog or more than one product at the same time.
- You can copy one or both of the options assigned to a product to one or more other products.
- You can sort option attributes so that they are shown in a specific order.
- You have the ability to associate an additional price with each product option.
  - The price can be the same for all products using that option, or specified on a product by product basis (e.g. an online gallery may charge $20 for a "black frame" regardless of the size of the poster that the customer is buying, or instead charge a different price for it depending on which poster is being purchased).
  - The additional price can be different for retail and wholesale buyers (e.g. the price for the same black frame may be $20 for retail customer, but only $12.50 for wholesale buyers).

    - The price can be a positive or a negative number. Continuing on the same example, posters may include a standard frame, but customers have the option of buying a poster with a deluxe frame (add $30) or without a frame (subtract $10).
    - The positive or negative option price is automatically added to the product's base price when the product is added to the shopping cart.
- You can set a product option as "required" or not. For example, customers may be required to select the size of a sweater, but not the optional gift wrapping.

Before you add options to your products, let's take a look at how they are organized in your store's database. Product options work as follows:

- **Option Groups** – Option groups define the main option name (size, color, weight, etc.).
- **Attributes** – Attributes are choices within that group (small, medium, large, etc.). So to assign a product a certain set of additional options (e.g. three or four sizes), you will first associate the product with an option group (e.g. size), then select three or four attributes to add to that group (e.g. small, medium, and large). You can order attributes when you assign them to a product, so that "x-small" would be shown before "medium" (although alphabetically it wouldn't) in the "Size" drop down menu on the product details page.

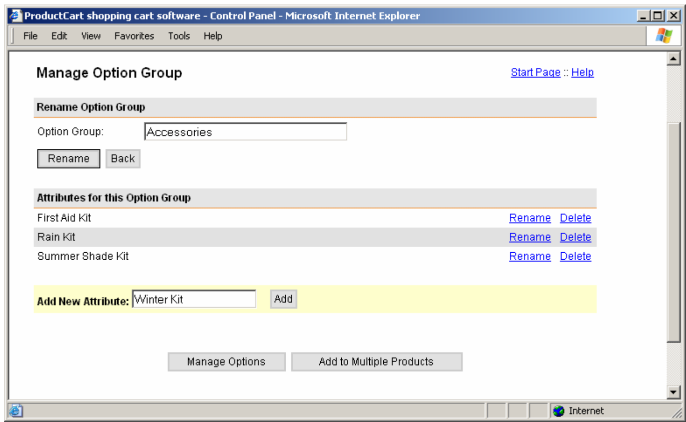


Note that you cannot assign options to a product unless you have created at least one option group. Therefore, the first step will be for you to create one or more option groups. To add option groups to your store catalog, follow the steps outlined below.

- From the *Manage Products* menu, select *Set Product Options*. If this is the first time you set product options, a message will indicate that no option groups have yet been defined. After you have added option groups to the database, this same window will list them and allow you to rename them, delete them, and add attributes to them.
- To create a new *Option Group,* click on the *New Option Group* link. A new window will be displayed. Name the new option group, then click on the *Save* button to return to the

previous page. For example, "color" or "size" could be the name of a new option group. The new entry will not appear in the list.

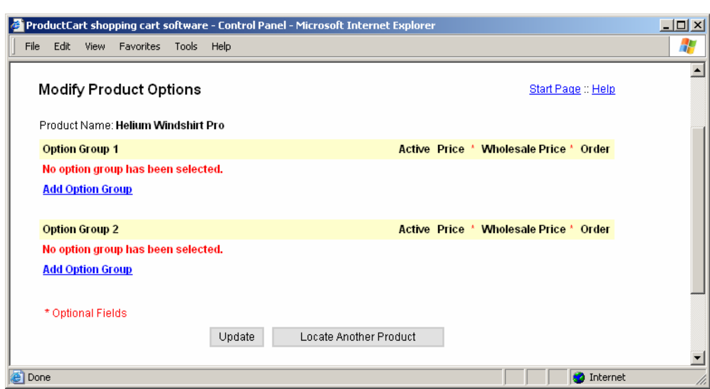
- Now click on the *Rename/Add Attributes* icon to add attributes to this group. Attributes are the actual options that users will select when purchasing your products or services (e.g. size: large). Type the attribute name in the *Add New Attribute* field, then click on the *Add* button. The attribute will be added to the group and displayed under *Attributes for this Option Group*.



Repeat the same task for as many attributes as you would like to add to this option group. Note that you can add as many attributes as you would like, without having to actually assign all of them to all the products that will use that option group. For example, you could set the attributes "small, medium, large, x-large", and then only assign the "small, medium, large" attributes to a particular item that is not available in "x-large" size.

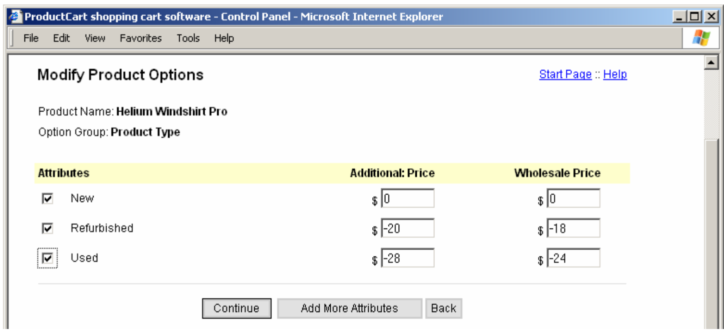
Assigning Options to One Product

Now that you have created an option group and added attributes to it, you can assign options to one or more products. Let's first look at how you can assign options to a single product. To do so, select *Modify Products* from the *Manage Products* menu, locate the product to which you would like to assign options, then click on *View/Add Options*. The following screen will be displayed.



Because you have not assigned options to this product before, the page prompts you to add an option group. As you have probably noticed, this window is organized into two areas, *Option Group 1* and *Option Group 2*. That's because ProductCart allows you to define up to two option groups for each product.

Add a first option to the product by clicking on *Add Option Group*. You will be prompted to select one of the option groups that you had previously added. Select one from the drop down menu and click on the *Continue* button. A window will be displayed, which lists all attributes defined for the selected option group. For example, in the image displayed below we are in the process of adding the option "Product Type" to a certain computer product.

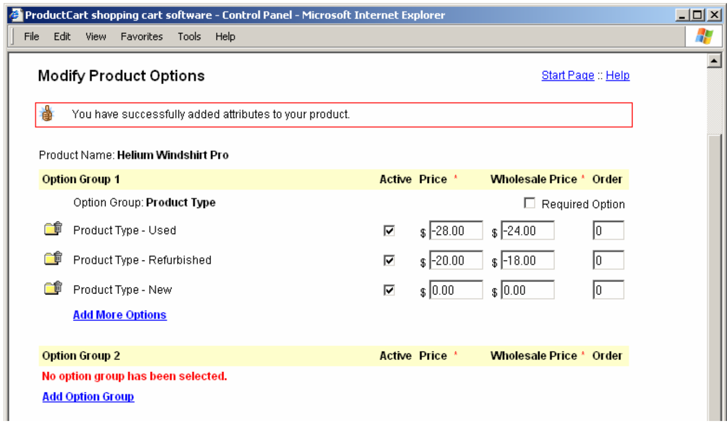


Note how the store owner in this example has opted to select all three of the available attributes, which are "New", "Refurbished", and "Used". ProductCart allows you to associate a positive or negative price difference with each attribute, with the ability to specify different values for retail and wholesale customers. In the example above, the price of a refurbished or used version of the product will be lower than the product's online price, and therefore a negative number is entered in both the price and wholesale price fields.

On your storefront, price differences will be displayed as follows:

- Positive price difference. The word "Add" and the amount are displayed next to the option name (e.g. "X-Large – Add $5.50"). When the customer adds the product to the shopping cart, the difference is added to the unit price for the product.
- Negative price difference. The word "Subtract" and the amount are displayed next to the options name (e.g. "No picture frame – Subtract $45"). When the customer adds the product to the shopping cart, the difference is subtracted from the unit price for the product.

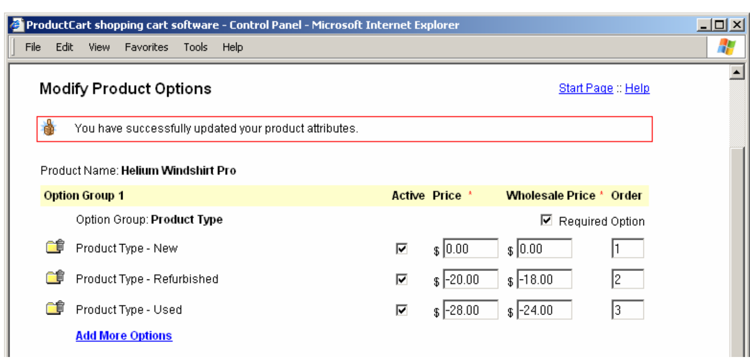
When you are done selecting attributes and defining price variations, click on the *Continue* button to add this option to the product. The *View/Add Product Options* page will now show the added option in the top part of the page. You can easily remove attributes and change prices, but remember to click on the *Update* button if you do so.



Attributes will be shown to the user in a drop down menu on the product details page, just below the product description. By default, they are ordered alphabetically. This however may not work for you. For example, if you were selling clothes, the sizes "medium", "small", "large" and "x-small" need to be ordered in a way other than alphabetical to make sense to the customer. To order attributes, enter numbers in the *Order* field considering that the lowest number will be shown as the first attribute in the drop down menu. Continuing on the example mentioned above, the store administrator could give the value "1" to "New", "2" to "Refurbished", "3" to "Used" and so on.

Another important feature is the *Required Option* check box. When you check this box customers will be required to select an option before adding the product to the shopping cart. An alert box with the name of the option field is displayed when they attempt to add the product to the shopping cart from the product details page. This gives you the ability to handle different scenarios in which product options may or may not need to be specified.

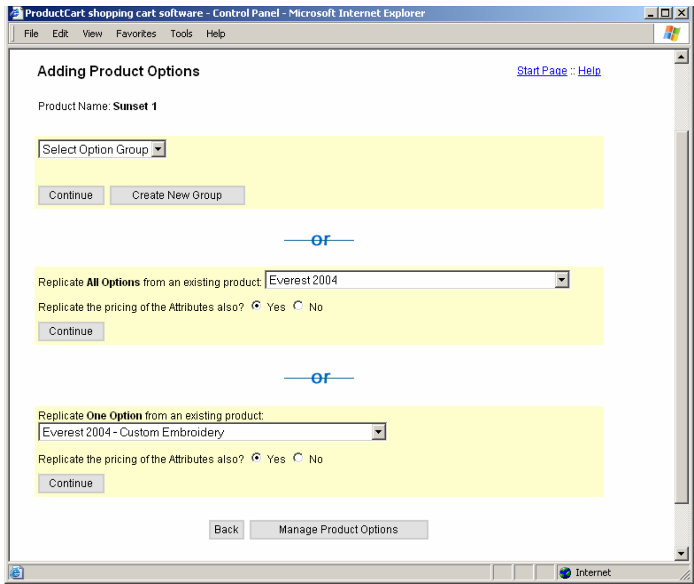
For example, you may want to force customers to select a size for a clothing item, but not force them to select an optional gift box. In this scenario you would set the option group "Size" as required, but leave the option group "Gift Wrapping" as non-required.



Note that if you use the display option where multiple products can be added to the shopping cart from the category page (where a list of products in that category are displayed), users will not be required to select an option for any of selected products, even if a required option has been associated with one or more of them. Therefore, if your products use options and one or both option groups are required, do not use that display setting.

Follow the same steps to add a second option (option group and attributes) to the product.

To speed up the process, ProductCart allows you to assign options to multiple products at once (see the next section), or to copy options from one product to another. The following screen is displayed when you select to add an option group to a product. The bottom two options allow you to either copy all options from another product, or select one of the option groups assigned to another product and copy it to the select product. If both cases you can opt to also copy the price differentials associated with each option attribute.



To remove an option from the list, click on the remove button located on the left. When you remove the last option in a group, the option group itself will be removed as well.

Assigning & Removing Options to/from Multiple Products

Let's now consider the scenario in which it would be more efficient for you to assign options to multiple products at the same time. This is typically the case when the same type of option applies to a number of different products in your catalog. For example, your online clothing store may carry 30 different t-shirts, all available in small, medium and large sizes.

To assign options to multiple products at the same time, follow these steps.

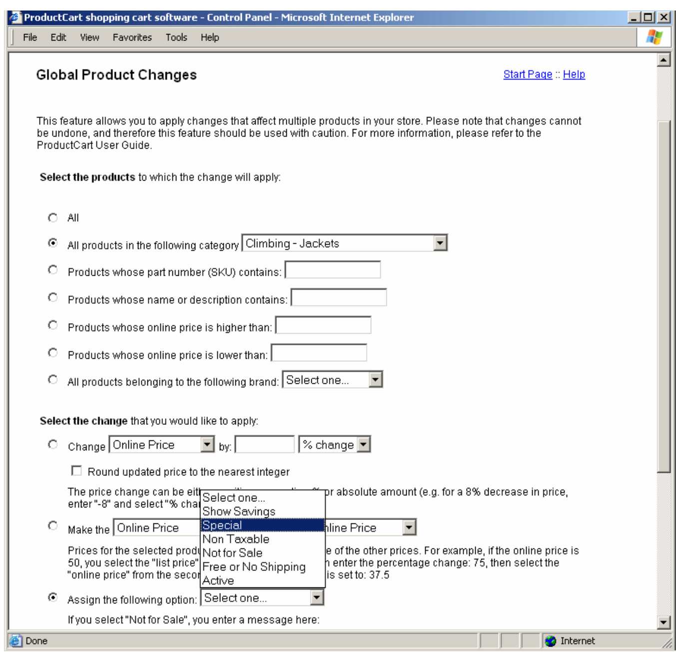
- From the *Manage Products* menu, select *Manage Options*. Locate the option group that you would like to work with or create a new one, then click on *Assign to Multiple Products*.
- Next, select the products to which you would like to assign this option group. Products to which you have already assigned two option groups will not be shown.
- Then, specify which of the available attributes apply to these products, associate price differences with them (if any), order the attributes, and finally set whether or not the option should be required.

- You are done. If you need to, you can now locate a product, select *Options*, and edit any of the options that you have just assigned to it.
- ProductCart also allows you to remove a certain option group (or an attribute within an option group) from multiple products at once. On the *Manage Options* page, select *Remove from Multiple Products*. On the following page, check the products from which you would like the option removed, and then click *Continue*. Next, select the attributes that you would like to remove. ProductCart will remove the selected attributes from the products you have chosen. If all attributes within an option group are removed from a product as a result of this action, the corresponding option group is also removed from the product.

Changing Multiple Products at Once

ProductCart makes it easier and faster for store administrators to change product attributes across multiple products at the same time. For example, what if your store sells hundreds of clothing items, and you wished to decrease the price on all wool sweaters by 20% as part of a "Spring Sale"? Many ecommerce applications give you the ability to edit prices, and other product details, only on a product-by-product basis. With ProductCart it's easy to edit multiple products at once.

To access this feature, select *Global Changes* from the *Manage Products* menu. The window shown below will be displayed. As you can see, it is divided into two sections:



1. The top area allows you to filter the product database so that you temporarily group the products that you need to modify. You can use one of the following filters (select *All* if you wish to apply the change to all products in your store):
    a. **All products in the following category**. Select a category to apply the change only to products that belong to it. Otherwise, use the default selection, which includes all categories.

b. **Products whose part number (SKU) contains**. Enter a part number (SKU) or part of it.

c. **Products whose name or description contains**. Enter one or more keywords that the selected product should contain in the product name or product description.

d. **Products whose online price is higher than**. ProductCart will filter out all products whose online price is lower than the amount entered here.

e. **Products whose online price is lower than**. ProductCart will filter out all products whose online price is higher than the amount entered here.

f. **All products belonging to the following brand**. Select a brand name from the drop-down menu. Any change will be applied to all products that have been assigned to the selected brand.

2. The bottom area allows you to specify which change should be applied to the selected products. You can select one of the following changes:

   a. **Modify the price**. You can modify the Online Price, List Price, or Wholesale Price, by either a percentage value (e.g. 5%) or an absolute amount (e.g. -10). Changes can be positive or negative. Therefore, for an 8% decrease in price, enter "-8" and select "% change". As you modify the price, you can opt to have ProductCart round the updated price to the nearest integer.

   b. **Set the wholesale price**. You can quickly set the wholesale price as a percentage of the either the Online Price or the List Price. Wholesale prices for the selected products are set as a percentage of the online or list price. For example, if the online price is 50 and you enter 75, the wholesale price is set to: 37.5.

   c. **Assign or remove an attribute**. The attributes that you can either assign or remove from the selected products are: Show Savings, Special, Non Taxable, Not for Sale, Free Shipping, Active, Disregard Stock, Display "No Shipping" Text. For more details on these attributes, see the section of this chapter that talks about adding products to the store. If you opt to assign the "Not for Sale" attribute, you can specify a message to be displayed on the product details page (e.g. "This product has been discontinued").

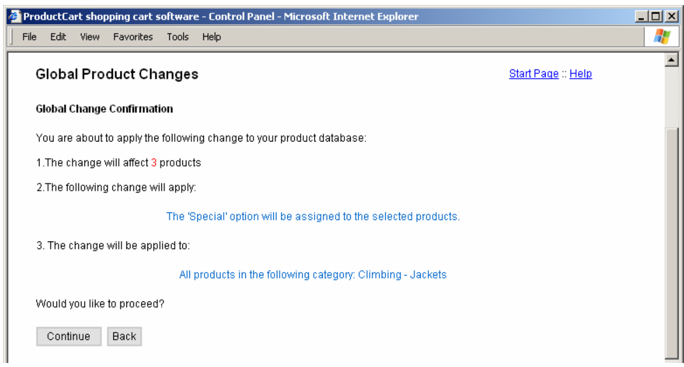
   d. **Assign product weight**. You can quickly set the product weight for the selected products to the amount entered on the form. You can specify the amount in pounds and ounces (or kilograms and grams).

   e. **Assign stock level**. You can set the inventory level for the selected products to the amount entered in the corresponding field. Whatever inventory level is currently associated with the product(s) will be replaced with the new value.

   f. **Minimum quantity customers can buy**. When you enter a number higher than zero, the product option *Validate for Multiple of N* is set to *Yes* and *N* becomes the number you enter in the input field. For more information on this feature, review the section of this chapter that covers product settings.

g. **Change Product Type**. This feature only applies to users of ProductCart Build To Order. You can change the product type for the selected products to one of the 3 product types supported by ProductCart BTO: Standard Product, BTO Product, and BTO Only Item.

Next, click on the *Submit* button to show and verify the changes that you are about to make to the store catalog. The *Global Change Confirmation* page will be displayed. It lists how many products will be affected by the change, what type of change is being applied, and what filter was used to select these products. In the example below, the store administrator is about to increase the list price by 5% on all products that belong to the category "Memory".



If the information contained on this page appears to be correct, click on the *Continue* button to run the global change script. If you need to edit the product selection criteria or the change details, click on the *Back* button.

After running the update script, ProductCart will display a summary page.

Be extra careful when using this feature as changes are sometimes difficult to undo, and may affect a large number of products in your store catalog. If you need to undo a global change, the only way to do so is to use the exact same product filtering criteria, and opposite change details (e.g. if the online price has been increase by 12, you can decrease it by the same amount). Percentage changes are difficult to undo because the percentage is calculated on the new value (e.g. increasing 10 by 5% is not the same as decreasing 10.5 by 5%).

Changing Multiple Product Prices at Once

New in ProductCart v2.75 is a new feature that allows you to quickly update prices for multiple products at once. While the Global Changes Feature can help you do so when the price change is consistent for N products (e.g. increase by 5% all retail prices in category XYZ), it doesn't help when the price changes differ from product to product. In that case, the new *Update Product Prices* will provide the tools you need.

- You can list 25, 50, or 100 products per page.
- For each page, ProductCart will list the product SKU, name, list price, online price, wholesale price, and whether the *Show Savings* feature should be active.

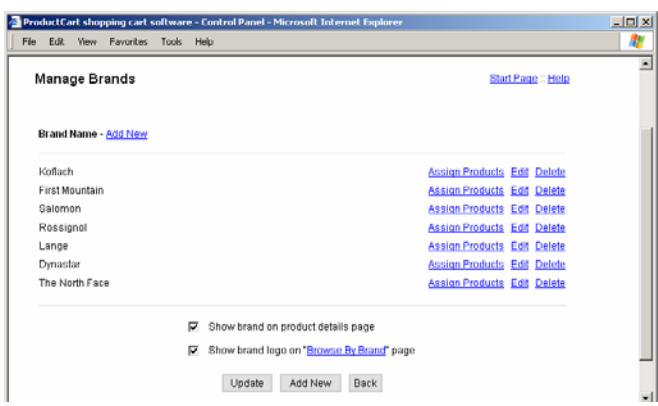
- Change the prices that need to be updated, check the *Select* check box, and click on the *Update Prices* button to save the changes to the database.

Managing Brands

Another great feature in ProductCart is the ability for the store administrator to associate products with brands. Assigning a product to a brand has the following effect on your store:

- In the storefront:
    - The product details page (*pc./viewPrd.asp*) shows the brand that the product has been assigned to, right underneath the SKU, if the *Show brand on product details page* is checked. The brand name is hyperlinked to a page that shows all other products assigned to that brand.
    - The advanced search page (*pc/advSrca.asp*) shows a "Brand" filter. To filter by brand, customers can select one of the available brands from a drop-down menu that is dynamically populated with all the brand names used on the store.
    - You can link to the "Shop by Brands" page from anywhere on your store (e.g. you can add a button to your navigation bar). The page that you need to link to is: *pc/viewCat_brands.asp*. You can choose whether or not to display brand logos on this page, as described below.
- In the Control Panel:
    - When adding or editing a new product, you can specify its brand.
    - When importing an existing product database, you can import brand information.
    - When locating a product, you can filter by brand.

To add, edit, or remove brands select *Manage Brands* from the *Manage Products* menu. When adding a brand, simply enter the brand name and the image file name for its logo (if you plan to use brand logos on your store). If not, leave that field blank.



Once you have added a brand to your store, click on *Assign Products* to select the products that belong to the brand. You will be shown a list of products currently assigned to the brand. To assign new products, click on the *Assign Products* button, then select the products that you want to associate with the brand. You can also associate a product with a brand when adding a new product or editing an existing product.

Note the two options located at the bottom of the page:

- Show brand on product details page. When this option is checked, the brand name is shown on the product details page, at the top of the page, right underneath the product SKU (for a graphical example, see the sample product details page at the end of this chapter).
- Show brand logo on "Browse By Brand" page. When this option is checked, the "Shop by Brands" page (*pc/viewCat_brands.asp*) will link brands with their names & logos. The number of brands shown on each row and the number of rows per page follow the category display settings that are configured at the bottom of the *Display Settings* page.

Using Custom Product Fields

Custom product fields give you additional flexibility in managing your store. In a nutshell, you can add custom fields to a product to collect or display additional product information, and allow your customers to further interact with the store.

This feature was substantially improved in ProductCart v2.75, with new store management tools in the Control Panel that make it easier and faster to assign and manage custom fields. In addition, the custom search field feature was significantly enhanced in the storefront, giving your store customers better, more efficient ways to search your product catalog.

ProductCart supports two types of custom fields:

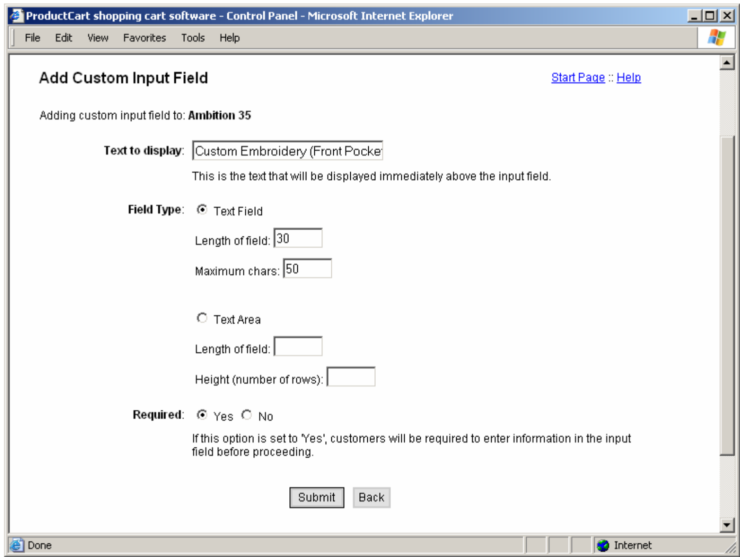
- **Input fields** allow you to collect information from the customer during the check out process. For example, an online clothing store could allow customers to enter their initials to be embroidered on the front of a polo shirt. Or a printing store could allow customers to provide the information to be written on the business cards that they are ordering.
- **Search fields** allow you to display additional information about the product, and let the customers use it as search criteria on your store's advanced search page. For example, a wine store may want to display the year, region and type of grapes for a particular wine on the product details page. Of course, this could be done by adding the information to the product description. However, by using custom search fields the information becomes available on the advanced search page in terms of drop-down menus that can be selected as additional search filters. In this example, store customers would then be able to search the store by year, region or type of grapes.

You can add and edit custom fields on a product by product basis or storewide. Let's first look at how you can add these fields to a specific product. First, locate a product. Then, click on the *Custom Fields* link. The page that loads contains the following links:

- Add input field
- Add search field
- View existing custom fields
- Copy custom fields to other products

- Locate another product

Let us first look at the features offered by **custom input fields**. When you click on *Add input field* the page shown below is displayed.

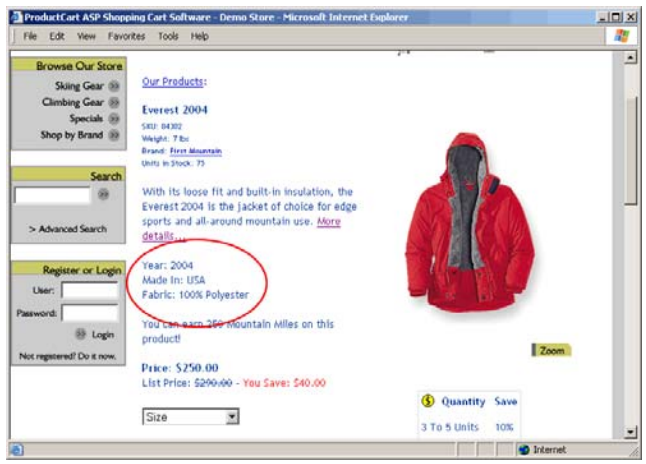


- **Text to display** is the text label that will be displayed just above the field on the product details page. For example, if you wanted to create an input field for customers to enter a message for a greeting card, you would write something like "Enter a greeting card message" in the *Text to display* field. In the example above, the store is allowing customers to have their name embroidered on a shirt. The name can be up to 50 characters long, so that value is being entered in the *Maximum Chars* field.
- **Field type** defines the type of text field that will be added to the product details page. It can either be a <u>text field</u> (one line only) or a <u>text area</u> (multiple lines, with horizontal and vertical scroll bars). In the first case, enter the number of <u>maximum characters</u> that the field would accept (e.g. you may only accept 4 letters for initials to be embroidered on a shirt). In the second case, enter the number of rows (field <u>height</u>) to display on the page. In both cases, you can set the number of characters that will define the length of the field on the page. Note that this is a "look & feel" setting: it doesn't limit the number of characters that can be entered. Typically input text fields are between 5 and 40 characters in length.
- **Required** defines whether customers will be required to fill in the field or not. If they are, and forget to do so, a message reminds them to fill in the field when they attempt to add the product to the shopping cart. To continue on examples used earlier in this chapter, a clothing store may allow customers to enter their initials to be embroidered on a shirt, but would likely not 'require' them to provide their initials. On the other side, a trophy shop may require customers to indicate what text should be engraved on the silver trophy that the customer is purchasing.

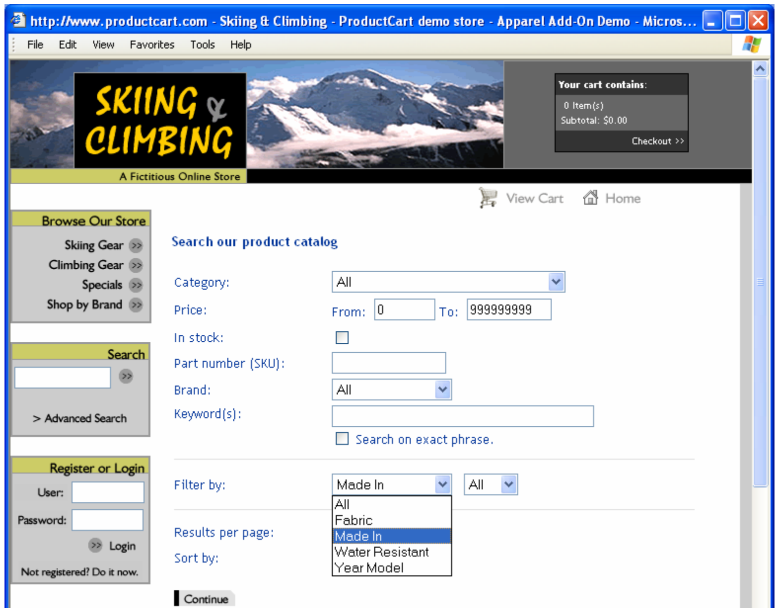
You may add up to three custom input fields to any product in your store. They can be a combination of text fields and text areas. All information collected via input fields is recorded in the store database and included on order confirmation e-mails and order detail pages.

Unlike custom input fields, **custom search fields** affect two areas of your online store:

1. On one side, they allow you to display product information on the product details page separately from the product description, just below the product description. For example, in the image shown below an apparel store has added 3 custom search fields to a jacket (Year, Made in, Fabric), which are displayed just under the product description.



2. On the other side, additional search filters are automatically added to the advanced search page in the storefront (advSrca.asp). These additional search criteria are shown in the *Filter by* section of the page, which is only visible if custom search filters have been assigned to active products in the store. The first drop-down menu contains the field name (e.g. "Made In"), while the second drop-down shows all the values associated with that field name that are being used on the store (e.g. "USA", "China", "Italy", etc.). When the user selects an entry from the first drop-down menu, the second menu is populated automatically with the corresponding values. Note that not all search field values are shown, but only the ones that are associated with active products.

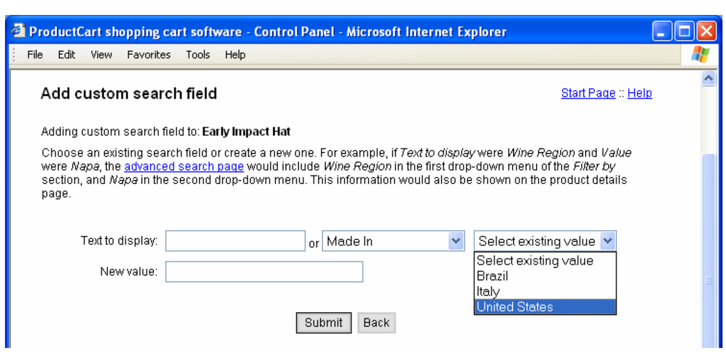


The *Add search field* page contains the following fields:

- **Text to display** is the field name (e.g. Wine Region). This text is displayed on the product details page, just under the product description and before product options, custom input fields, etc. The same text is also displayed on the search page in the 'Filter by' drop down menu.

  You can create a new custom search field (e.g. this is the first time that you use the "Wine Region" field name), or you can select a custom search field already in use on your store (e.g. the second time you need to assign the same search field to another wine, you would select "Wine Region" from the drop-down).

- **Value** defines the information that will be displayed on the product details page, and the search criteria that will be listed on the second drop-down menu on the advanced search page. Continuing on the example mentioned above, if the *Text to display* were 'Wine Region' and the *Value* were 'Napa', the search page would include 'Wine Region' in the first 'Filter by' drop-down menu and 'Napa', 'Tuscany', 'Southern France' etc. in the second drop-down menu.

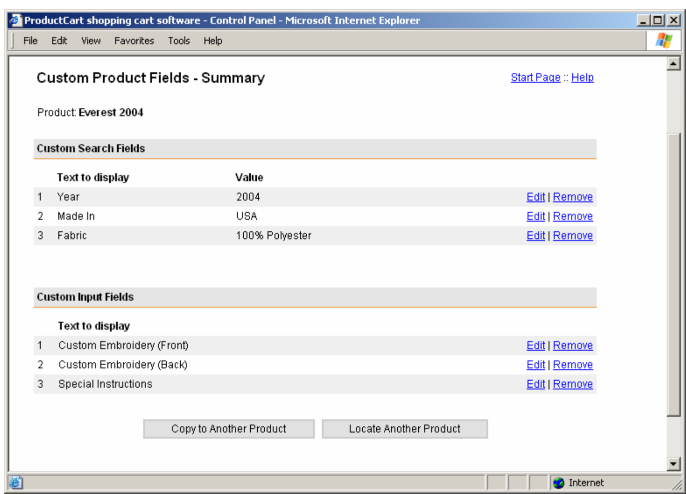


Click on the *Submit* button to add this field to the product. You may add up to three custom search fields to any product in your store.

For those familiar with HTML: a great way to use custom search field is to **build hard-coded searches** into your Web store navigation area. For example you could let your store customers search your catalog by price range (e.g. Under $25, $25 to $50, etc.), or by brand, etc. To do this, all you have to do is run a search with your site's search page using that filter (e.g. the custom search field "Brand") and a certain value ("Panasonic"), and then use the URL displayed in the browser's address field on the results page as you HTML link that the text or image would point to (e.g. "Panasonic" could be entry on a "Search by Brand" drop down menu).

The third link on the *Custom Product Fields* page allows you to view existing custom fields so that you may edit them and/or delete them. When you click on *View existing custom fields*, ProductCart displays a page that lists custom search fields and custom input fields that have already been added to the product. In the top area:

- Click on ***Edit*** to load the same window described earlier in this chapter that allows you to configure the settings for the search field.
- Click on ***Delete*** to remove the field from the product. A window will confirm that the field has been removed from the product and will ask you whether you would like to remove this field from the entire database. Answer 'Yes' only if you want to remove the field from all other products that may be using it. In addition, if you answer 'Yes' the field would be removed from the 'Filter by' drop down menu on the search page.
- If any of the three fields is unassigned a 'Field not assigned' message is displayed. In that case, click on the *Add* button to add a new search field.

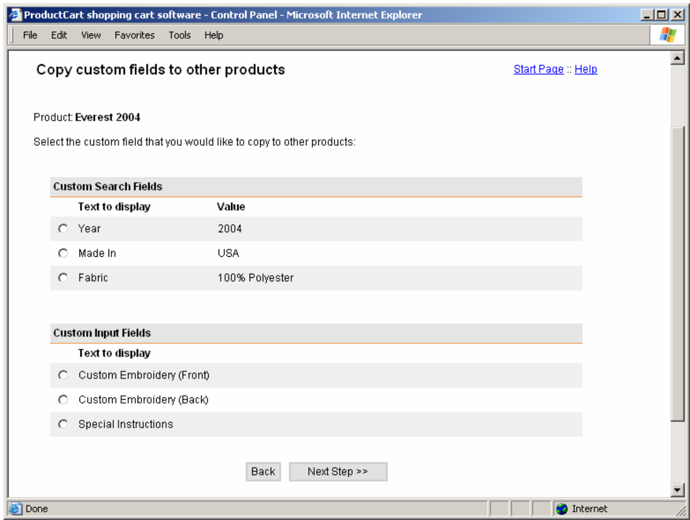


The lower part of the window lists custom input fields that had already been added to the product.

- Click on ***Edit*** to load the same window described earlier in this chapter that allows you to configure the settings for the input field.
- Click on ***Delete*** to remove the field from the product. Just like with custom search fields, a window will confirm that the field has been removed and will ask you whether you would like to remove this field from the entire database. Answer 'Yes' only if you want to remove the field from all other products that may be using it.

- o If any of the three fields is unassigned, a 'Field not assigned' message is displayed. In that case, click on the *Add* button to add a new input field.

To speed up the process of adding custom fields to multiple products, ProductCart allows you to copy a field onto other products. Click on *Copy to Another Product* from the *Custom Product Fields-Summary* page. Then, select which field you would like to copy. You can only copy one field at a time. This is because each product can contain a maximum of three custom search fields and three custom input fields: if the product already contained fields and you were copying multiple fields at once, ProductCart would not know which fields to assign and which to ignore.



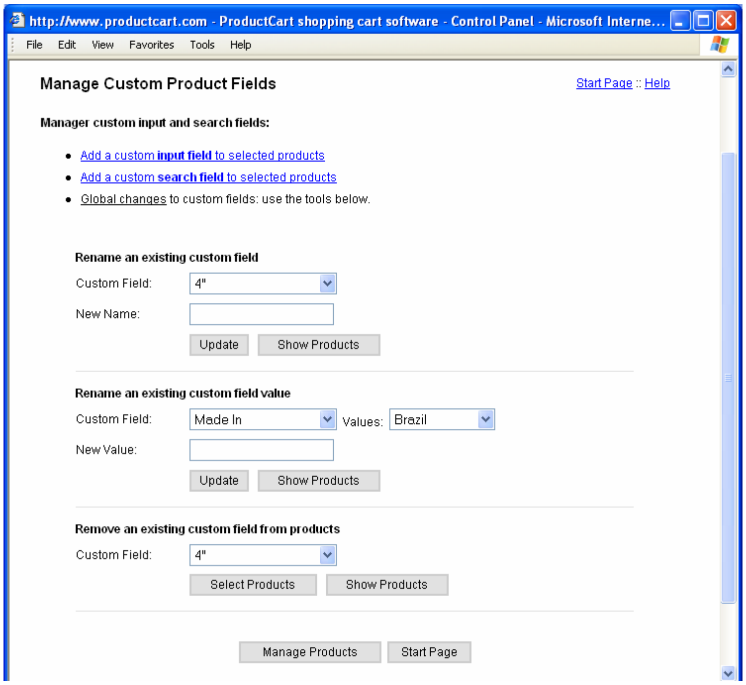
On the following screen, check the products to which you would like to assign the selected field. . If a product already has been assigned all available fields (3 search fields and 3 input fields), the product will not be listed. If you attempt to add a new search or input field to a product that already has respectively the maximum number of search fields or the maximum number of custom fields assigned to it, the field will not be assigned to the product.

If you need to edit or remove custom fields from more than one product at a time, there is a faster way to do so, rather using the pages mentioned above. From the Control Panel navigation, select *Manage Products* > *Manage Custom Fields*.

- To rename an existing custom field (e.g. you want to change "Wine Region" to "Wine Regions"), select the field, enter a new name and click on the *Update* button. Use the *Show Products* button to view a list of products that are currently using the selected field. If no products are found, ProductCart will ask you whether you would like to delete the custom field from the database.

- To rename an existing custom search field value, select the field value that you would like to rename by choosing from the drop-down menus. Note that the second drop-down menu is populated with values on after you make a selection from the first drop-down. Enter a new value in the *New Value* field, and then click on *Update*. Use the *Show Products* button to view a list of products that are currently using the selected custom search field value. If no products are found, ProductCart will ask you whether you would like to delete it from the database.

- To <u>remove an existing custom field from N products</u>, select the field from the corresponding drop-down menu, and then click on *Select Products*. You will be shown a list of products that are currently using this field. Select the ones from which you would like the field to be removed, and then press *Update Selected*. Use the *Show Products* button to preview a list of products that are currently using the selected custom field. If no products are found, ProductCart will ask you whether you would like to delete it from the database.



Creating and Modifying Product Categories

Product categories allow you to organize your product catalog and make it easier for customers to browse through your on-line store. With ProductCart you can create multiple categories and subcategories, and assign a product to an unlimited number of categories and subcategories, as long as they don't contain subcategories. In ProductCart, <u>categories (or subcategories) can either contain subcategories or products, not both</u>.

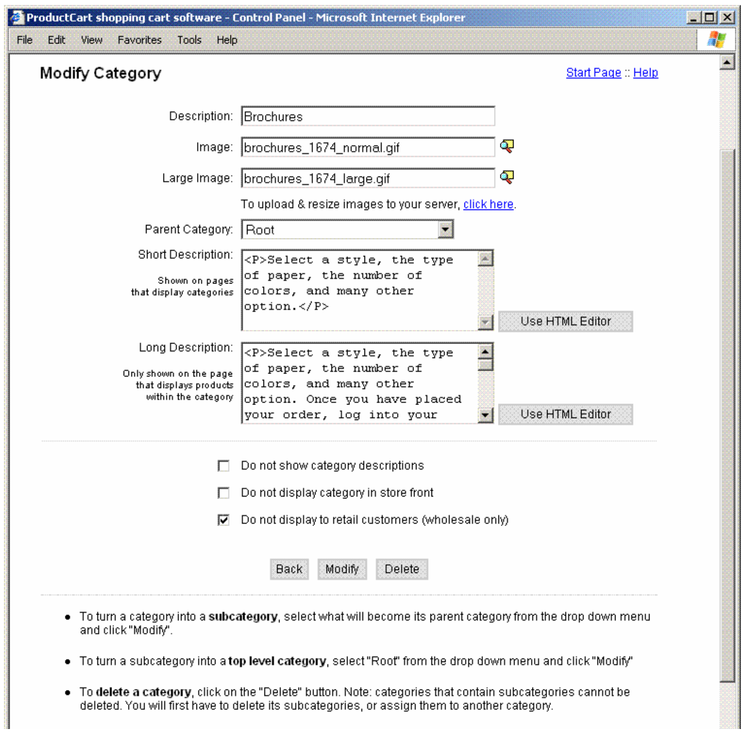
You can create up to four subcategory levels in the category tree. For example: "greeting cards" (category), business (subcategory of "greeting cards"), "thank you cards" (subcategory of "business"), "classic" (subcategory of "thank you cards"), etc. You can also control the order in which categories and their subcategories are displayed when customers browse your store.

Let's start by looking at the following definitions:

- **Root**. This is the top level in the category tree. When you create a new category, you will set it as a *root* category unless you want it to be a subcategory of another category.
- **Categories**. You can have unlimited subcategories.
- **Parent Category**. This is the category to which a subcategory belongs. When you create a new subcategory, select the category that it belongs to from the *Parent Category* drop

down menu. Note that parent categories cannot contain products. Their subcategories can, unless you want them to also be parent categories. Therefore, you will not be able to select a category as a parent category if it contains products. If you don't see a specific category listed in the *Parent Category* drop down menu, that is likely because the category contains products, and therefore cannot contain subcategories.

- **Subcategories**. The process of creating a subcategory is the same as creating a category. The only difference is that you will have to specify which parent category or parent subcategory this subcategory belongs to. ProductCart supports up to four category levels.



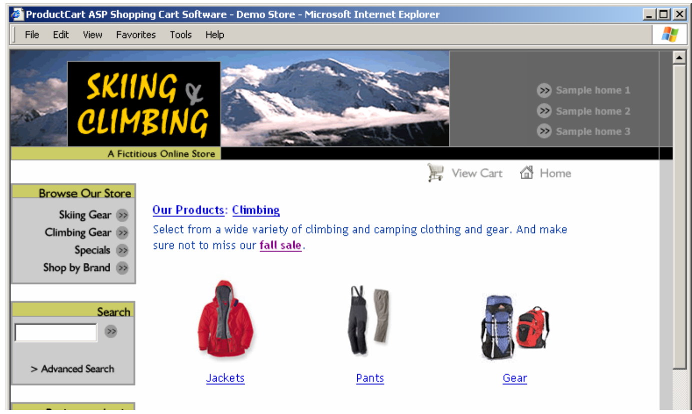
You can **create a new category or subcategory** in two ways: by adding one category at a time or by importing category information using the *Product Import Wizard*, which was discussed earlier in this chapter. Here we will focus on adding individual categories to your store.

- Click on *Manage Products / Add Category*.
- Enter a category **Description**. This is the category name that will be displayed on your store when people browse the store by category, together with the category image.
- Enter the file name of the image file that you would like to use as a **category image**. We recommend that you keep category images below **100 x 100 pixels** in size to allow multiple categories to be properly displayed when customers browse your store.

  Note that all images used by ProductCart reside in the *productcart/pc/catalog* subfolder on your Web server. You do not need to specify the folder name in this field, just the file name. To upload images to this folder you may use the *Upload Images* feature under *Manage Products* or your favorite FTP program.

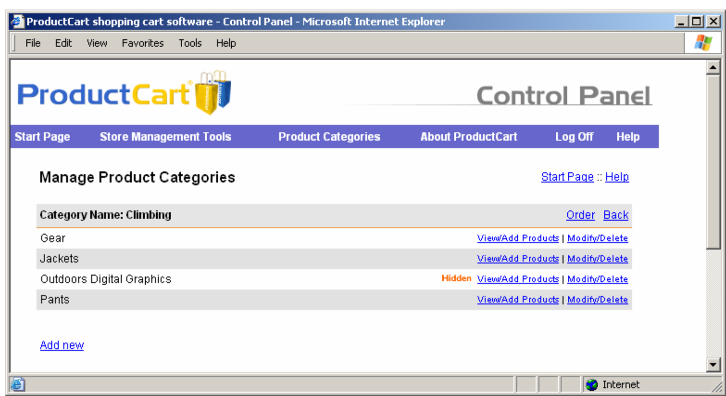
If the images that you intend to use have already been uploaded to the server, you can browse through them and copy the file name to the corresponding image field by clicking on the search icon.

- Enter the file name of the image file that you would like to use as a **large category image**. You only need to enter a value here if you plan to use one of the two display settings that include a large category image at the top of the page. Refer to the *Display Settings* section of this manual for more information.
- If you want to provide information about the subcategories that the selected category contains, enter a **short description**: This description field supports HTML tags and is shown at the top of the page, below the category name, only on pages that display subcategories of the selected category. Use the HTML editor to apply HTML formatting to the description.
- If you want to provide information about the products that the selected category contains, enter a **long description**: This description field supports HTML tags and is shown at the top of the page, below the category name, only on the page that displays products within the selected category. Use the HTML editor to apply HTML formatting to the description.
- If you have previously entered category descriptions, but no longer wish to show them, check the *Do not show category descriptions* option.
- If you do not want to display the category in the store, check the *Do not display category in store front* option. This feature is especially important for users of the Build To Order version of ProductCart in that it allows the store administrator to organize in categories BTO items that are not available for sale as stand alone products. For more information, see Chapter 14. The feature is also useful for all ProductCart users to temporarily hide a category and its subcategories (e.g. you are doing maintenance on that area of your store). If you hide a parent category, customers will not be able to view & browse its subcategories either.
- If you don't want retail customers to view this category when they browse the store, check the option *Do not display to retail customers (wholesale only)*. The category will only be shown when wholesale customers browse the store after logging in.
- Specify which category this subcategory belongs to from the drop-down menu (**parent category**). If this is a top level category (i.e. this is not a subcategory of any other category), select *Root* from the drop-down menu. If a category does not appear in the *Parent Category* drop-down menu, the reason is that either the category has products assigned to it or is the lowest level of category that ProductCart supports (i.e. it cannot have subcategories). Categories that contain products cannot at the same time contain subcategories.
- Click *Save* to add the category to your store. You may assign products to this category when adding a new product, by using the *Modify Products* feature under *Manage Products*, or by using the *View/Add Products* window under *Manage Categories*.



To **modify an existing category or subcategory**:

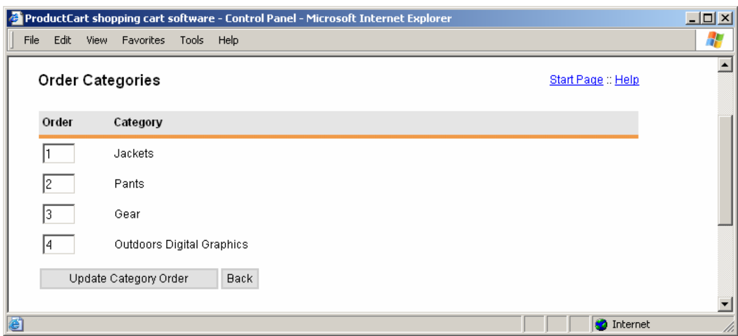
- Click on *Manage Products / Manage Categories* .
- A list of all existing top-level categories (root) is displayed. If a category does not contain subcategories, a *View/Add Products* link will be displayed on the right. If a category contains subcategories, a *View Subcategories* link will be displayed instead. The same is true for a subcategory. If a category is hidden on the storefront, a *Hidden* graphic is shown.



- Select the category that you would like to modify by clicking on *Modify/Delete* on the right side. You will be shown a window identical to the *Add New Category* window discussed earlier in this section.
  - To turn a category into a subcategory, select what will become its parent category from the drop down menu and click *Modify*.
  - To turn a subcategory into a top level category, select *Root* from the drop down menu and click *Modify*
  - To delete a category, click on the *Delete* button. Note that to be able to delete a category, it must not contain any subcategories, and no products can be assigned to it. You will first have to delete its subcategories (or assign them to another category or subcategory), and delete the products that belong to it (or assign them to another category).

To **view, add or remove products** from/to a category:

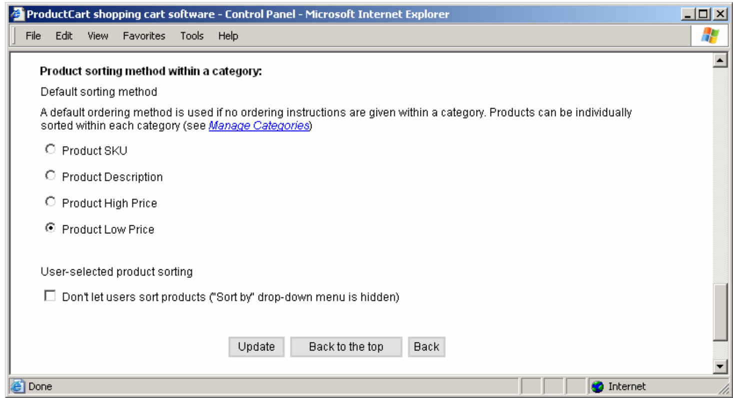
- You can add a product to a category in four ways: when adding a new product to your store through *Product Wizard*, when adding a new product via the *Add New Product* window, when modifying a product through the *Modify Product* window, or through the *Manage Categories* module, which is discussed here.
- To **view** the **products** contained in a certain category, and to add or remove products to/from a category, click on *View/Add Products* on the *Manage Categories* window. This link is only displayed if the category does not contain subcategories. Otherwise a *View Subcategories* link is displayed.
- To **add products**, click on the *Add Products* button. Select the products that you would like to add to the category from the following page, then click on *Add Checked*.
- To **remove products** from the category, check the products that you would like to remove and click on the *Remove Checked* button.
- Click on *Back to Manage Categories* to return to the category list.



To **change the order** in which categories are displayed on your store, browse to the parent category of the categories that you would like to order, then click on the *Order* link located I the top right corner of the page. A page similar to the above will be displayed. Categories will be displayed according to the numbers you enter in the *Order* field. Note that you should start renumbering when you are ordering subcategories within a parent category. If you don't specify an order, categories will be displayed alphabetically.

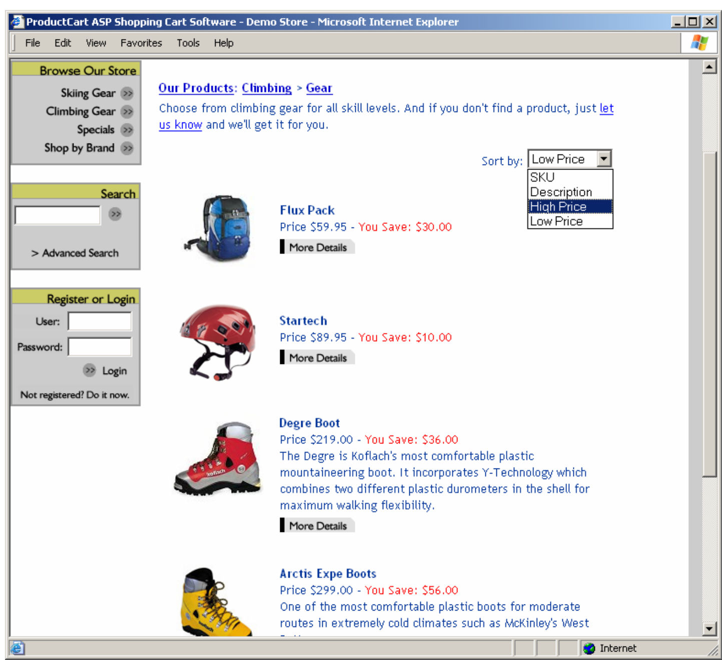
Ordering Products within a Category

How are products ordered within a category? There are three ways to define the order in which products are displayed within a category. Two are set by the store administrator; one is specified by the store visitor. Let's start with the ordering settings that the store administrator can define.



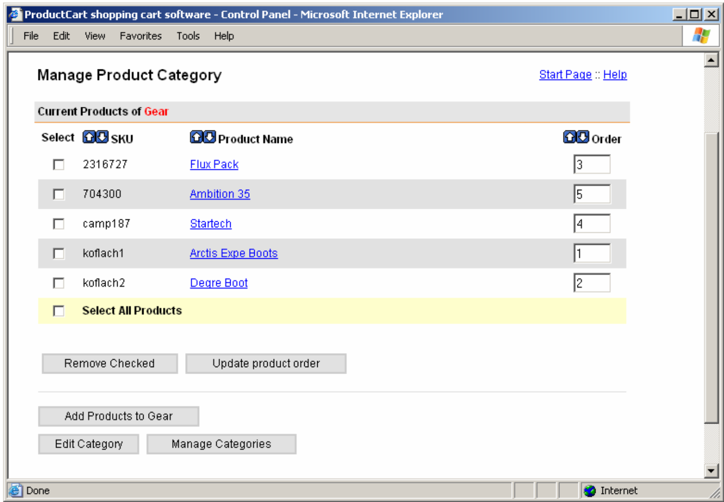
As the store administrator, you have the ability to set a default ordering criteria that applies to all categories. Specifically, this is the order in which products are displayed when you do NOT sort products within a specific category as described later in this section. For example, if you have a large number of products in a specific category, you will probably choose to use a general sorting method rather than assigning an ordering value to each product.

To set this option, select *Display Settings* from the *General Settings* menu, and then scroll to the bottom of the page. You can have products automatically sorted by SKU (part number), description (product name), or by price (highest first or lowest first). Select an ordering option and click on the *Update* button to save this setting.



ProductCart gives your store visitors the ability to reorder products within a category by using the *Sort By* drop-down menu. Products can be ordered by SKU (part number), description, and by price (highest prices first or lowest prices first).

If you do not wish store visitors to be able to reorder products, you can turn this feature off by checking the *Disallow This Feature* option at the bottom of *Display Settings* page. When this option is checked, the *Sort by* drop-down menu is not shown on the browse & search pages.



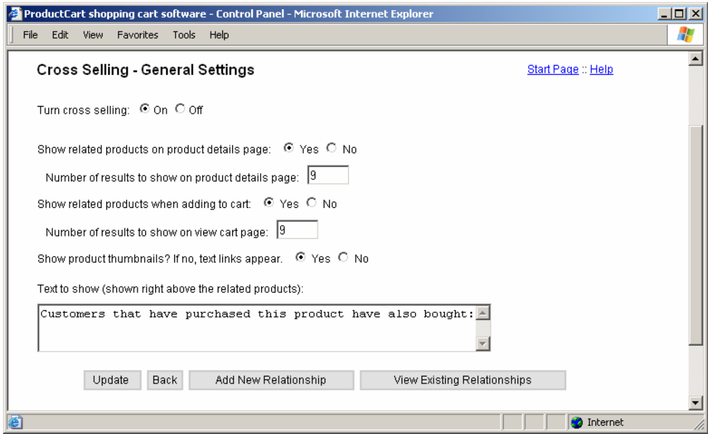
You can also set an exact order in which products should be displayed within a category, which takes priority over the default ordering criteria selected on the *Display Settings* page. To do so, select *Manage Categories* from the *Manage Products* menu, then locate the category that contains the products you wish to order. Click on *View/Add Products*. All the products contained in the selected category will be displayed. Use the input field on the right side to order them, then click on the *Update Product Order* button.

Cross selling

ProductCart gives you the ability to cross-sell items on your store. Cross-selling can help you increase your sales by presenting customers that are in the process of buying a certain product with a number of related products in which they may also be interested. Most large e-commerce stores use this marketing tool, and in a variety of ways.

Under *Manage Products*, click on *Cross Selling*, then select the ***General Settings*** link to specify how you would like to use ProductCart's cross-selling feature on your store. The page that is displayed allows you to set the following options:

- **Turn cross selling on/off** – This option allows you to turn the feature on or off. This way you don't have to remove relationships that you have set between products in case you opt not to have cross selling active on your store for some period of time.

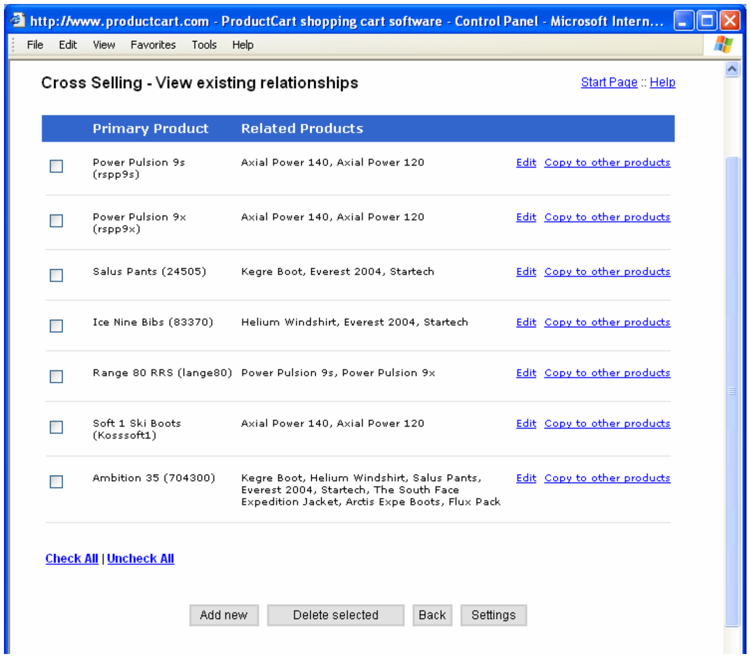


- **Show related products on product details page** – This is the first of three display settings. This option defines whether related products will be shown on the product details page. If set to 'Yes', then N products related to the selected one will be shown on its product details page. N is the number of products that have been associated with the primary product. Related products are displayed at the bottom of the product details page, below the *Add to Cart* button, but above the *Long Description* if the product has both a short and a long description.
- **Show related products when adding to cart** – This option defines whether related products should be shown on the shopping cart page. If set to 'Yes', then N products related to the ones that have been added to the shopping cart will be displayed. They are displayed below the shopping cart content, at the bottom of the page.
- **Show product thumbnails? If no, text links appear.** – This setting defines whether related products should be shown with their respective thumbnail images or not.
- **Text to show –** Enter the text that you would like to display right above the related products. For example, it could say something like: 'Customers that have purchased this product have also liked'.

Once you have defined general settings for the program, the next step is to create relationships between products. At the bottom of the window, select ***Add new relationship***. At this point ProductCart will take you through a multi-step process to set up a new relationship between a primary product and its cross-sell items.

- Step 1 consists of selecting the primary product
- Step 2 consists of selecting products related to the primary products. Use the CTRL key to select multiple products from the list.
- Step 3 allows you to set the sort order in which related products will be shown. This gives you flexibility when displaying cross-sell items as you can place the 'strongest' candidate for a cross-sale at the top of the list.
- Step 4 completes the 'wizard' and shows you a list of existing relationships.

To edit and remove relationships between products, select ***View existing relationships*** on the *Cross Selling* window. A page similar to the one displayed below will be shown.



On the left side of the page are listed 'primary products' and on the right side their respective 'related products'. To edit an existing relationship, click on the *Edit* button. You will be able to add or remove products from the list, as well as set the order in which they are displayed.

To completely remove one or more existing relationships, check the box next to each of them, and then press the *Delete Selected* button at the bottom of the page.

To quickly assign the same or similar cross-selling relationship to multiple products at once, click on ***Copy to other products***. The selected cross-selling relationship will be copied over to the products you choose. You will then be able to fine-tune each relationship by using the *Edit* button next to it.

Managing Inventory

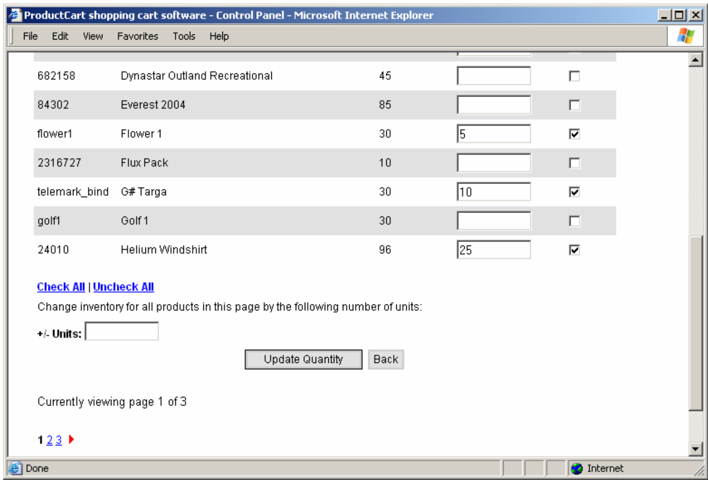
ProductCart automatically keeps inventory levels updated for you. When you add a new product to your product catalog, you have the ability to specify the initial inventory level. As orders are submitted for a particular product, the inventory level for that product is adjusted accordingly.

- Inventory levels are adjusted immediately at the time an order is placed. So when an order is 'pending', the inventory levels for the purchased products has already been adjusted.
- When an order is 'processed' the inventory is not updated, since it had already been updated when the order was initially placed..
- When an order is 'cancelled', the inventory level is reinstated.
- When an order is shipped, then partially or fully returned, inventory is NOT updated. The rationale behind this behavior is that the customer may be returning a product that is

damaged. So ProductCart leaves it up to the store administrator to decide whether the inventory level should be adjusted or not.

For more information about how orders are handled by ProductCart, see Chapter 11.

Since you may receive new shipments of products, or produce new products, etc. you need to be able to change the inventory settings at any time. To view and modify inventory levels, select *Manage Inventory* from the *Manage Products* menu.



You will be shown a list of all products in your product catalog and their inventory level. You can sort products by SKU, product name or inventory level using the small arrows located next to the column name.

To adjust the value in the *Inventory Level* column, use the *Add Units* field. Enter a positive number to add units to the current inventory level. Enter a negative number to decrease the current inventory level. Make sure to check the check button next to the products for which you have entered values, and then click on the *Update* button to apply the change.

If you wish to change the inventory level on multiple products by the same amount, select the products to which the change will apply, enter a positive or negative amount at the bottom of the page, and then click on the *Update* button. Click on the *Check All* link to select all products that appear on the page.

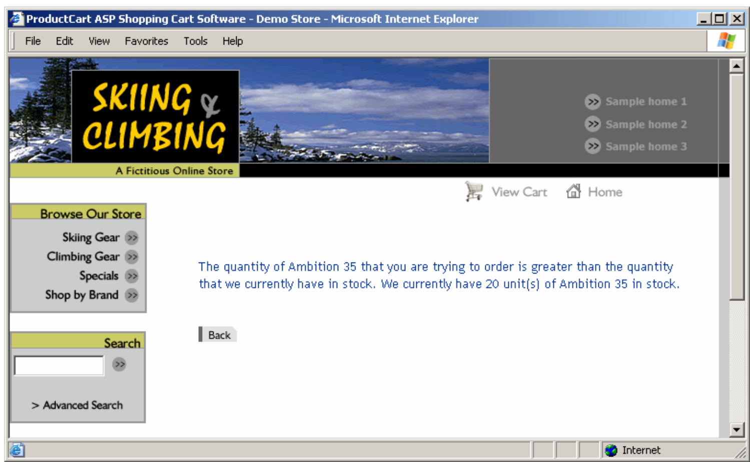
Now, let's look at how the inventory settings located in the *Store Settings* page affect the way ProductCart deals with inventory.

- When the feature *Allow customers to purchase out of stock items* is set to *No*, customers will not be able to order products that are out of stock. The "Add to Cart" button will not be displayed on the product details page. You can opt whether or not to show an "Out of Stock" message on the product details page by checking the corresponding option on the *Store Settings* page.
- As mentioned, you can have individual products ignore this general inventory setting by checking the *Disregard Stock* option on the *Add/Edit Product* page.
- Another order-related restriction is enforced automatically by ProductCart when the store is set not to allow the purchase of out of stock items: customers will not be able to order

a quantity that exceeds the quantity in stock for any of your products. If they attempt to do so, they will receive a message indicating what the maximum allowed quantity is. This is true both when they add the product to the shopping cart and when they "recalculate" the quantity on the shopping cart.

For example: if the stock level for a certain pair of shoes were 25 and the customer were to add 26 units to the shopping cart, a message would be displayed indicating that the ordered amount exceeds current inventory levels. If the customer were to add 20 units to the shopping cart, no message would be displayed. However, if the same customer were to add 6 units to the order by editing the quantity field on the shopping cart and recalculating the shopping cart total, ProductCart would then display a message indicating that the maximum number of units that can be purchased for that pair of shoes is 25.

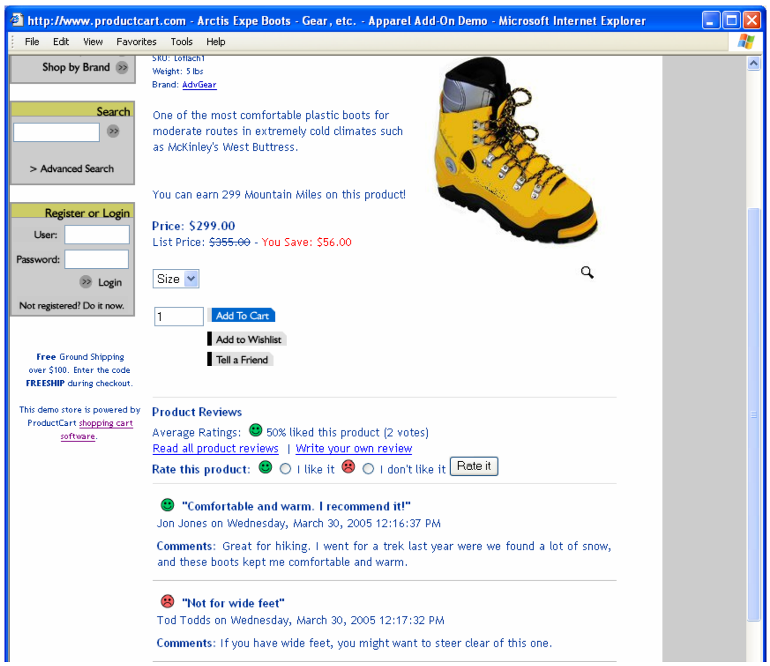
As mentioned before, these and virtually all other text messages dynamically displayed by ProductCart can be easily edited by following the directions outlined in Appendix C.



Note that if you are using product options, ProductCart will not treat each product variation as a separate inventory item. However, there is a new ProductCart Add-on, called the Apparel Add-on, that provides this and other features for advanced **inventory tracking on product options**.

Managing Product Reviews

New in ProductCart v2.75 is a system that allows customer to rate and review products on your store, and allows you to manage, check, approve, and reject those reviews. You can turn off and on this feature on a storewide basis, or for individual products. You can allow reviews to be immediately posted on your Web store, or set up the system so that each review has to be approved before it is shown in the storefront. Here is an example of how product reviews can look on your store.

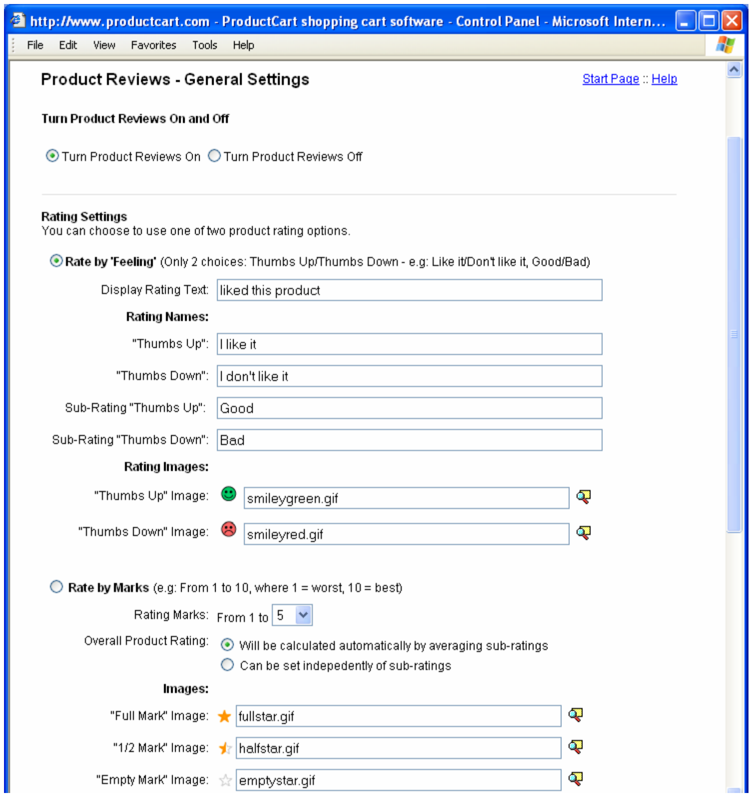


Product reviews are shown at the bottom of the page, below cross selling items and the detailed product description. You can set the system to show N reviews on the product details page, while the rest of the reviews are shown on a separate page that customers can get to by clicking on *Read all product reviews*.

A summary of the ratings given to the product is shown at the top, and customer reviews are shown underneath it. Depending on how you configure this feature, customers will be required or not required to post a textual review of the product. They will also be prompted to rate products on any number of things that you define for them. In the example above, customers were ask to simply say whether they liked the product or not. Theoretically, they could have been asked to rate the products on many more things such as comfort, warmth, value, etc. You can assign different rating criteria to different products (e.g. "performance" could be a good rating criteria for a pair of skis, but not "comfort", which instead could be used for rating ski boots sold on your store).

These and a number of other settings can be configured when setting up the *Product Reviews* feature. So let's start by looking at the general settings for this feature. From the Control Panel navigation menu, select ***Product Reviews >Product Reviews Settings***.

At the top of the page that is a option to turn the feature "on" and "off" on a storewide basis. If you would like customers to be able to post reviews on at least one of your products, turn the feature on. You will be able to turn it off for individual products using the *Product Exclusion* feature, which is discussed later in this chapter.



Customers will be able to give a general opinion on a product by either saying whether they liked it or not (*Rate by Feeling*) or by saying now much they liked it (*Rate by Marks*). Let's look at these two options in more details.

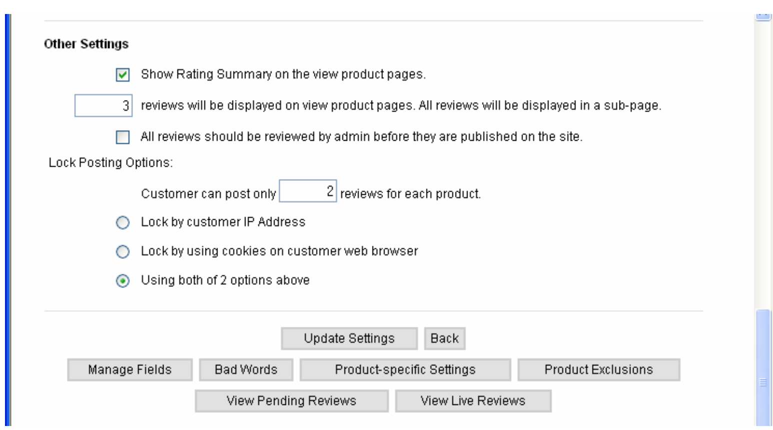
- **Rate by Feeling**. When you enable this feature, customers will be asked to say whether they liked the product or not. It's a yes/no type of question. The answers given by all of the customers that rate the product will then be taken into account and the product details page will say something like *35% of customers liked this product (46 votes)*. The language used can be changed using the following fields:
    - <u>Display Rating Text</u>: this is the "liked this product" portion of the "35% of customers liked this product" statement mentioned above. This is shown on the product details page, in the summary section of the product reviews area.
    - <u>Thumbs Up, Thumbs Down</u>: This is the text that is shown next to the two radio buttons that allow customers to rate the product. This text is used only for the general rating question, which is the one shown on the product details page. This is the first question that the customer is asked to answer to rate the product (and the only question unless you set up other fields in the *Manage Fields* area).

- o <u>Sub-Rating "Thumbs Up" and "Thumbs Down"</u>: This is the text that is shown next to the radio buttons shown for any other yes/no question that you ask your customers to answer when they post a review. This text is used when you create a *Rate by Feeling* field in the *Manage Fields* page. If you don't have any *Rate by Feeling* custom fields, this text is never shown.
- o <u>Rating images</u>: Use the default images or upload your own images (e.g. you could upload thumbs up & thumbs down images, or alike).

- **Rate by Marks**. When you enable this feature, customers will be asked not only to say whether they liked a product, but also how much they liked it. You can have them rate a product on a 1 to 5 or 1 to 10 scale. You can have the overall score (*Overall Product Rating*) be determined:
  - o <u>By automatically averaging sub-ratings</u>. If you choose this option, make sure you have one or more *Rate by Marks* custom fields. These fields are configured in the *Manage Fields* area, which is discussed later in this chapter.
  - o <u>Or independently of any sub-ratings</u>. You must choose this option unless you have custom fields whose type is *Rate by Marks*.

  Images are used in the storefront to show customers a graphical version of the numeric average of all the product ratings that have been submitted. You can use the default graphics or upload your own.

Note that changing the main rating option described above from *Rate by Feeling* to *Rate by Marks* (or vice versa) after customers have submitted product reviews could result in reviews no longer showing meaningful information in the storefront. We recommend that this option is not changed, or that you remove or hide existing reviews if you decide to change it.



The lower part of the *Product Review Settings* page allows you to set the following **other options**:

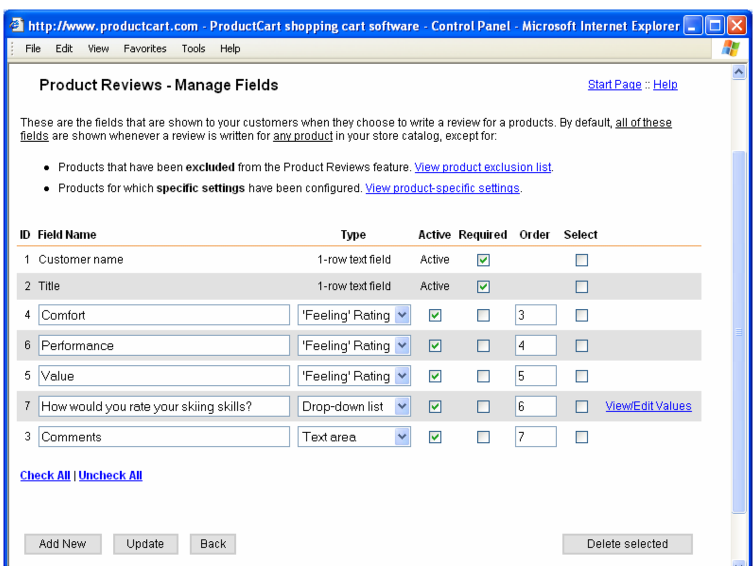
- o <u>Show Rating Summary on the view product pages</u>. Check this option if you want to show a rating summary on the product details page.
- o <u>N Reviews will be displayed on view product pages</u>. Here you can enter the number of reviews that you would like to show on the product details page. All reviews will be displayed in a sub-page. For example, if 12 reviews have been submitted and approved

for a product, and you enter "3" here, then only the 3 reviews are shown on the product details page, whereas all of the reviews are shown when the customer clicks on the *View All Reviews* link.

- <u>All reviews should be reviewed by admin before they are published on the site</u>. Check this option if you want to check and approve every review that is posted on your Web site before it is shown in the storefront. Otherwise, product reviews are shown immediately after they have been submitted.

  ProductCart can help you prevent "bad" language from being used in product reviews through the *Bad Words Filter* feature. From the Control Panel navigation menu, select *Product Reviews* > ***Bad Words Filter***. Enter one word per row in the *Bad Words List* area, and then click on the *Update List* button to save the list to the database. Whenever a review is posted, all "bad" words are automatically hidden and replaced with ****. If you decide to allow product reviews to be posted to your Web site without requiring your approval, you should definitely use this feature. But even if you configure the system so that your approval is required, this feature can help you speed up the task.

- <u>Lock Posting Options</u>: Use this feature to limit the amount of reviews that the same customer can post. You can specify how many reviews each customer can post for each product. You can determine who the customer is by registering the customer's IP address, using a cookie saved to the customer's computer, or both. Note that in many cases Internet users are assigned a dynamic IP address by their Internet Service Provider and therefore only using the IP address may not work in limiting the amount of times the same customer can post a review for the same product.

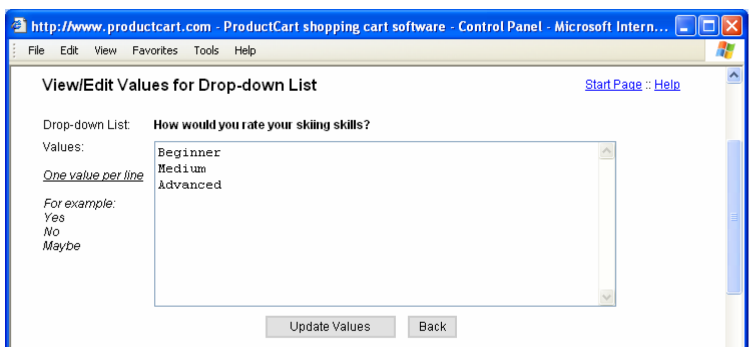


The ***Manage Fields*** area allows you to add additional questions/fields to the product review submission form. You can ask you customers to answer any number of questions and/or fill out any number of fields. Each question or field can be required or not. You can set the order in which they are shown on the product review submission form, and edit, remove, or add new fields at any time.

Note that the fields that you specify on the *Manage Fields* page are used for submitting reviews for <u>all products</u> except those that either listed in the *Product Exclusion List* or for which you have defined specific requirements using the *Product-specific Settings* feature, which is discussed later in this chapter.

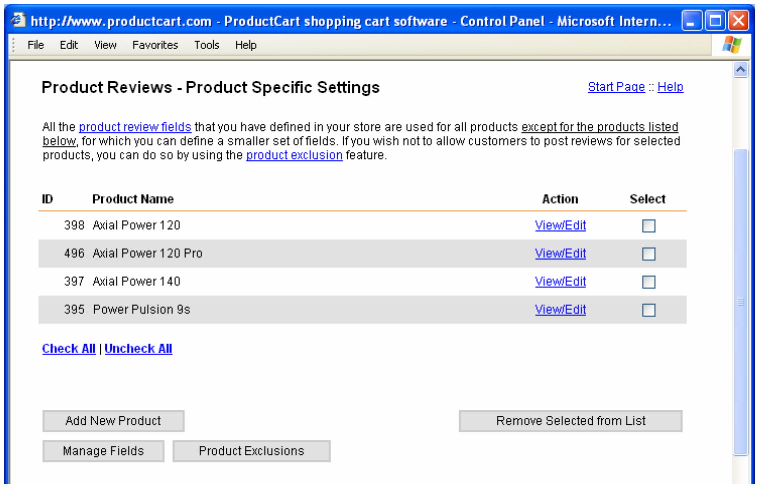
Let's look at the different kinds of fields that can be added to the product review form. There are 5 field types:

- <u>One-line text field</u>: A one-line input field. Use it for short, open questions (e.g. on a computer store "Where do you typically use a computer?")
- <u>Text area field</u>: A multi-line input field. Use it for longer, open questions (e.g. "Do you have suggestions on how to improve our Web store?").
- <u>Drop-down field</u>: A special field that allows you to pre-define which answers will be available for the customer to choose from. After you create a *drop-down field*, you will have to specify which values will be shown in the drop-down. You can do so by clicking on *View/Edit Values* on the *Manage Fields* page. A new window will be displayed (see image below). Enter one value per row, and then click on the *Update Values* button to save the list. If you don't specify any values, the drop-down field will not be displayed on the product review submission form.



- <u>'Feeling' rating</u>: A yes/no question that uses the <u>Sub-Rating "Thumbs Up" and "Thumbs Down"</u> settings mentioned earlier in this chapter. For example, if you entered "Positive" and "Negative" in those fields, you could have a *'Feeling' Rating* field entitled "What was your experience with customer service on this product?". Customers will be able to answer by choosing either "Negative" or "Positive".
- <u>'Mark' rating</u>: A question that is answered by choosing from a 1 to 5 or 1 to 10 scale. If in the *Product Review Settings* page you have chosen to calculate the overall product rating *By automatically averaging sub-ratings.*, make sure to create one or more *'Mark' rating* custom fields here. Otherwise the overall product rating cannot be calculated.

All the product review fields that you have defined in your store are shown on the product review submission form whenever a customer decides to post a review for <u>any</u> of the products in your catalog. However, there could be products for which some of those fields don't apply. For these product you can define a smaller set of fields using the *Product-specific Settings* feature.



From the Control Panel navigation menu, select *Product Reviews* > ***Product-specific Settings***. Click on the *Add New Product* button to choose the products for which you want to define a special set of fields. On the following page, uncheck the *Active* check box for the fields that you don't want to show when customers post a review. Click on the *Customize* button to save these settings. ProductCart will display a list of products for which you have customized the fields selection. Click on *View/Edit* to further specify which fields should be shown or hidden.

To remove products from the list, check the corresponding check boxes on the right side of the window, and then press the *Remove Selected from List* button. When you do so, all fields listed in the *Manage Fields* area will again be shown for those products.

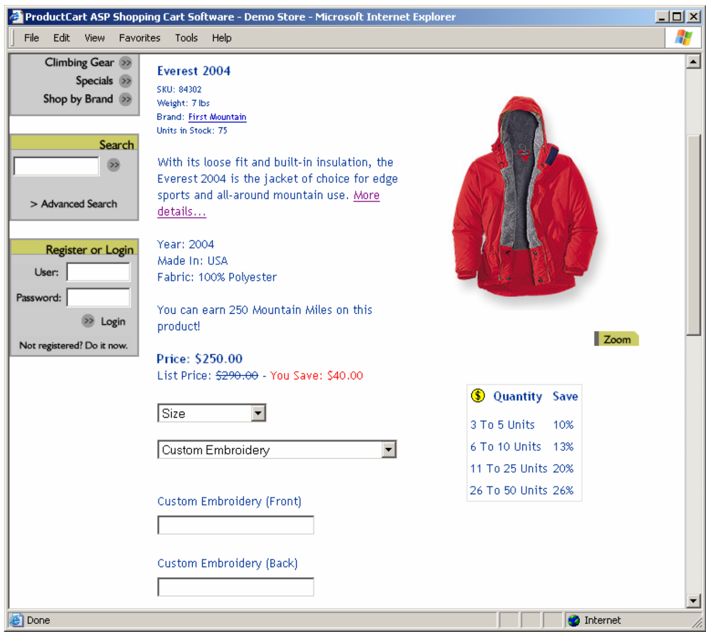
This feature allows you to limit the number of questions/fields shown on the product review submission form for selected products. However, there might be products for which customers should not be allowed to post reviews. If that is the case, use the ***Product Exclusions*** feature to list these products. From the Control Panel navigation menu, select *Product Reviews* > *Product Exclusions*. Choose the products for which product reviews are not available, and click on the *Add to Exclusion List* button. You can add/remove products from the list at any time.

As customers begin posting reviews in the storefront, you can use the Control Panel to keep track of them. At any time, you can see a snapshot of how many pending and live reviews have been submitted for any product in your store, and you can view details, edit, make active or inactive, and remove each product review.

- To view a list of reviews that have been posted, but are currently not shown to customers, select *Product Reviews* > ***Pending Reviews.*** If you have set up ProductCart so that reviews always need to be approved before being shown in your storefront, all reviews will always be *pending* until you manually render them active. You will be automatically notified via e-mail whenever a new review is posted. Click on the link included in the e-mail to check, edit and approve the new review.
- To view a list of reviews that are live in your storefront, select *Product Reviews* > ***Live Reviews.*** If you have set up ProductCart so that reviews are immediately shown to customers when they are submitted, there will be no *pending* reviews in your store unless you manually render any of the *live* reviews inactive.

Reviewing a Sample Product Details Page

To summarize many of the product features that have been addressed in this chapter, let's look at a sample product details page created by ProductCart (technically, the file is called pc/viewPrd.asp). Starting from the top, you will notice the product name, the part number (SKU), the weight, the brand which links to a page showing all other products assigned to the same brand, and the current inventory level. Then the short product description is shown, with a link to the long product description, which is displayed at the very bottom of the page. As mentioned earlier in this chapter, the long product description is shown if the short description is not available for this product. The *More details…* text link can be edited as indicated in Appendix C.



Below the short product description are the custom search fields that were assigned to this product. As mentioned before, there can be up to three custom search fields assigned to a product. In this case, they are: *Year, Made In,* and *Fabric*. This allows customers to search the store using those filters on the advanced search page.

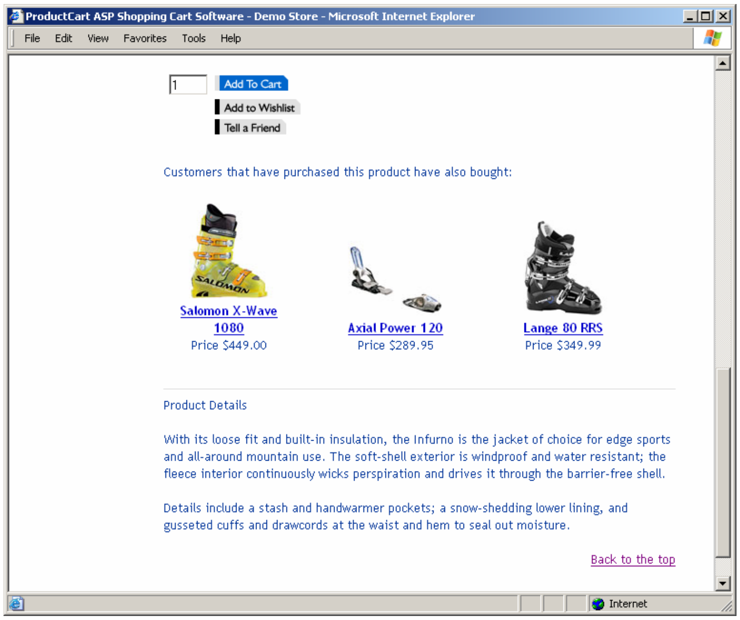
The Reward Points that can be accrued when purchasing this product are shown next. In this fictitious store, Reward Points were renamed *Mountain Miles*, and the feature was turned on (when off, points are not shown on the product details page, and they are not accrued).

Pricing information is shown below Reward Points. This product was set to show both the price, list price, and the savings between them. Below the price are product options (in this case: *Size* and *Embroidery*), which may or may not affect the price (in the example shown they both add an amount to the product price). The custom input text fields are displayed. In the example shown, the customer has the ability to enter text to be embroidered to either the front and/or the back of the jacket.

On the right side there is the product image, the zoom button which links to the detail view image (shown only if a detail view image has been specified for the product), and quantity discounts (shown only if quantity discounts apply to the selected product).

The bottom part of the page displays:

- The quantity field, *Add to Cart*, *Add to Wish List*, and *Tell a Friend* buttons.
- Cross selling products. Even if the product is out of stock or not for sale (quantity field and related buttons are not shown), cross selling products are still displayed.
- The long product description, together with a link to return to the top of the page.
- Product reviews, if the feature has been turned on.



These screen shots were taken from a fictitious store. All name and marks are property of their respective owners. Prices and product descriptions are not actual.

Chapter

5

Discounts and Promotions

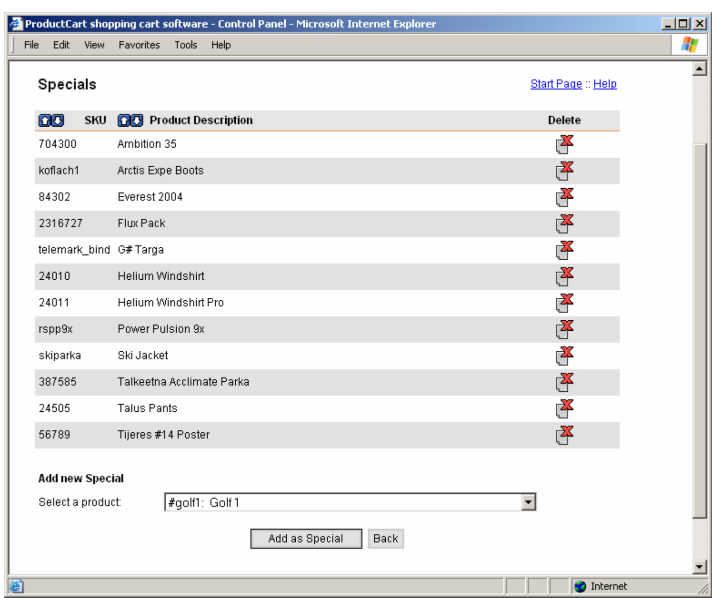
Managing an on-line store is no different than running a retail shop. Through special promotions and discounts you can increase sales for certain items and draw your customers' attention to specific products. ProductCart gives you the ability to easily setup a variety of promotions and discounts. First, we'll look at how ProductCart can help you automatically create 'specials' and 'featured' items. Then, we'll focus on product discounts.

Specials and Featured Items

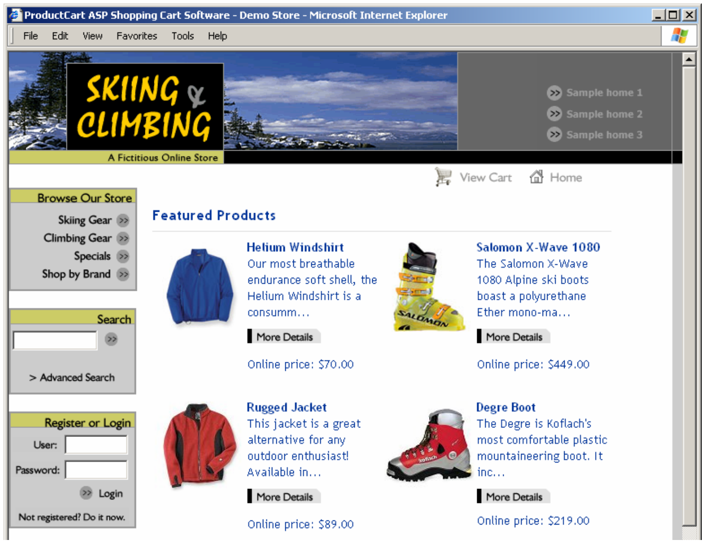
ProductCart allows you to increase the visibility of certain products in your on-line store in two ways: by creating *specials* and by setting certain products as *featured items*.

- **Specials**. To set a product as a S*pecial*, navigate to *Manage Specials* under the *Specials/Discounts* menu. Select a product from the *Select Product* drop-down menu, and click on the *Add as Special* button. Use the *Delete* button to remove the product from the list. The product is not deleted from your store database, but only from the *Specials* list.

  Specials are listed on a special page that you can link to from any other page on your Web site. For example, you could have a flashy graphic on your store's home page that links to your store's monthly *Specials*. Because many of your customers will likely click on the flashy graphic, all products listed on that page will gain additional visibility.

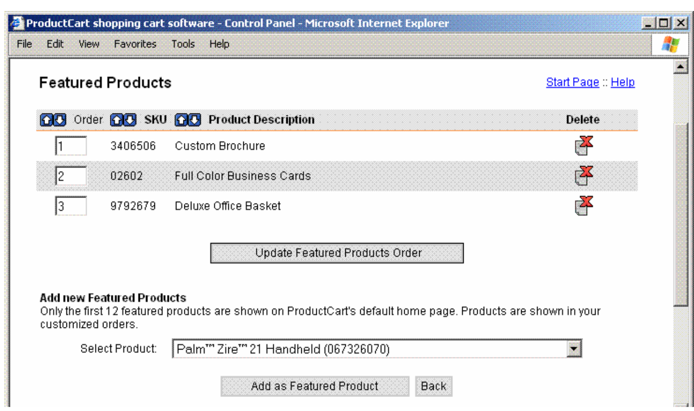


To generate the HTML code that you will use to link to the *Specials* page, select *Generate Links* from the *Store Options* menu or use the ProductCart Dreamweaver ® extension.



- **Featured Products**. In ProductCart, *featured products* are items that are automatically displayed on the default home page that ProductCart generates for your store. You may or may not want to use ProductCart's default home page as your actual store's home page. You can opt to use another page as your store's home page in the miscellaneous settings area of the [*General Settings / Store Settings*] section of the Control Panel.

  In addition, you may or may not want your Web site's home page to also be your store's home page, using ProductCart's default home page or your own. For information about how to make your Web site's home page the store's home page, see [Appendix A].



If you opt to use ProductCart's default home page, then you will want to specify which *featured products* should be shown there. To set a product as a *featured product*, select the link with the same name from the *Specials/Discount* menu. On the page that is displayed, select a product from the *Select Product* drop-down menu, and then click on the *Add as Featured Item* button. Up to 12 featured products can be shown on ProductCart's default home page. The products are ordered alphabetically. If you set more than 12 products as *featured,* the first 12 will be displayed.

To set the order in which *Featured Products* are shown, enter a number in the *Order* field, and then click on the *Update Featured Products Order* button.

Use the *Delete* button to remove the product from the list. The product is not deleted from your store database, but only from the *Featured Products.*

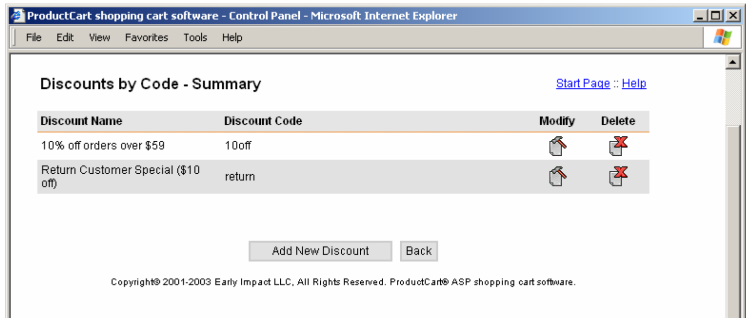
Advanced Users – Build Your Own 'Featured Products' page: The Control Panel allows you to set more than the 12 featured products that can be displayed in ProductCart's default home page. The reason is that you may want to create your own store home page, displaying N number of featured products, and still control them using this window. To build an ASP page that dynamically displays the products listed in the *Featured Products* page, refer to Appendix A. A working knowledge of ASP programming is required to take advantage of this feature. For more ideas about using *Special* and *Featured* products to build custom home pages for your ProductCart-powered store, visit the Developers' Corner at the ProductCart Support Center.

Discounts by Code (Coupons)

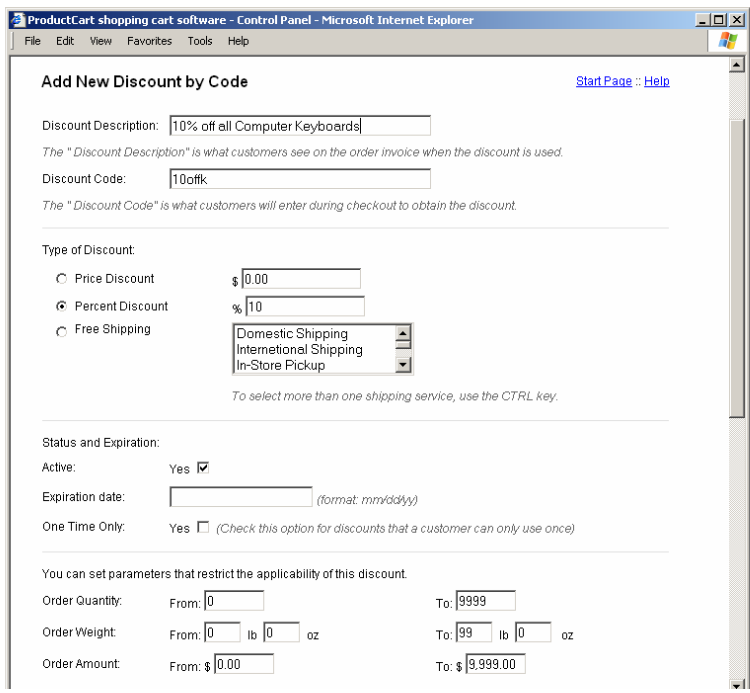
ProductCart allows you to set a variety of discounts. We will start by describing the *Discount by Code*, or coupon. This type of discount, works as follows:

- When you create a discount, you will assign a code to it.
- Then, you will notify your customers about it (through e-mail, your Web site, flyers, advertising, or any other way)
- When customers visit your on-line store, they will add products to their shopping cart as usual. No discount will be shown at that time. Upon check out, on the order verification page (pc/orderVerify.asp) they will be prompted to enter the discount code, if they have one. When they click on the *Recalculate* button, ProductCart will recalculate the order total and apply any applicable discounts. The order details section of the page will now display the savings (or free shipping, etc). If an invalid discount is entered, or the discount code used cannot be applied to the purchase, a message is displayed.
- New in version 2.75 is the ability for customers to enter multiple discount codes. For example, assume a preferred customer was sent two separate discount codes as part of two different promotions: "FreeGround", for free UPS Ground shipping on orders over $100, and "20-off" for 20% off orders that include selected merchandise. The customer is now able to redeem both coupons when placing the order. Multiple discounts must be entered on the order verification page separated by a comma.
- If your store is not using any discounts by code, you can hide the discount code input field from the storefront.

To create a *Discount by Code*, select that link from the *Specials/Discounts* menu. A list of existing discounts will be displayed. To create a new *Discount by Code*, click on *Add new discount*. To edit an existing discount, click on the *Modify* button. To delete an existing discount, select *Delete*.



To **create a new discount**, fill out the form displayed after you click on the *Add new discount* link. The following is a brief description of the fields contained on that page, and an explanation of how they affect your customers' orders. Click on the *Save* button to activate the discount (*Update* to update an existing discount).



Note that this feature was substantially improved in ProductCart v2.7, with the addition of a variety of new filters to the applicability of the discount, which greatly increase the flexibility with which you can use this marketing tool.

First, enter a description and a code for this discount. The code must be unique to this discount.

- **Description**. Enter a description for this discount, e.g. "Summer Sale" or "10% off orders over $50". This description is NOT the discount code that customers will have to enter during checkout. During checkout the description is shown on the order summary page, before the payment page. When an order is placed, this information is saved to the database and shown on the order confirmation e-mail that the customer receives as well as the *Process Order* page that you can access via the Control Panel.

- **Discount Code**. Enter the code that your customers must use to obtain the discount. The code is entered by customers at the bottom of the order summary page, before the payment page. This code will not be displayed by ProductCart on any page. It is up to you to choose a way to communicate it to your customers (e.g. via your Web site, an e-mail or direct mail campaign, etc.).

Next, select the type of discount.

- **Price Discount**. If you wish to set the discount as a flat amount, enter it here, without the currency sign. For example, you could give your customers $10 off the total of an order. In this example, you would enter "10" in the input field, without the dollar sign. This type of discount is often associated to a minimum purchase amount, which you can specify below under *Order Amount*.

  When the discount amount exceeds the order amount, the order amount is set to 0. For example, if you provide your customers with a $20 discount and do not set a minimum order amount, if the order amount is < $20, then it will be automatically set to $0. It will never be negative. In the case of a $0 order, shipping and handling charges are excluded from the discount, as well as payment fees, if any. If the order is taxable, taxes will be calculated on the shipping, handling, and payment fees, based on your store's tax settings.
- **Percent Discount**. If you wish to set the discount as a percentage of the order total, enter the percentage value here, without the % sign. For example, enter 20 for a 20% discount. Shipping and handling charges are excluded from the calculation (same as above).
- **Free Shipping**. You can give your customers free shipping on an order by creating a coupon that is associated with one or more shipping services. A list of all available shipping services is shown. Select the shipping services that you want to offer at no cost from the corresponding drop-down menu. If you don't see the shipping service that you would like to set as free, review your store's shipping settings, then return to this page. If you want to offer more than one shipping service at no cost, keep down the *CTRL* key on your keyboard as you make the selections.

Set the discount's status and expiration.

- **Active**. To disable or enable a discount, use this option. This allows you to create a discount code, but use it a later point.
- **Expiration date**. To set an expiration date for a discount, enter the date in the format shown on the page. Customers that enter the discount code after it has expired will be shown a message stating so. You can edit the message by editing the file *includes/languages.asp*.
- **One Time**. If you want to allow your customers to be able to only use the discount code once, make sure this option is checked. Each customer will only be able to use the discount for one purchase. The discount will expire for each customer when the order is placed. If a customer "drops off" before completing the order, the discount is not deemed used by ProductCart, so the customer can use it again.

Limit the applicability of this discount. Use the parameters listed below to limit the applicability of the discount. Note that you do not need to specify any of these parameters, unless you want to. You can use a combination of all three parameters.

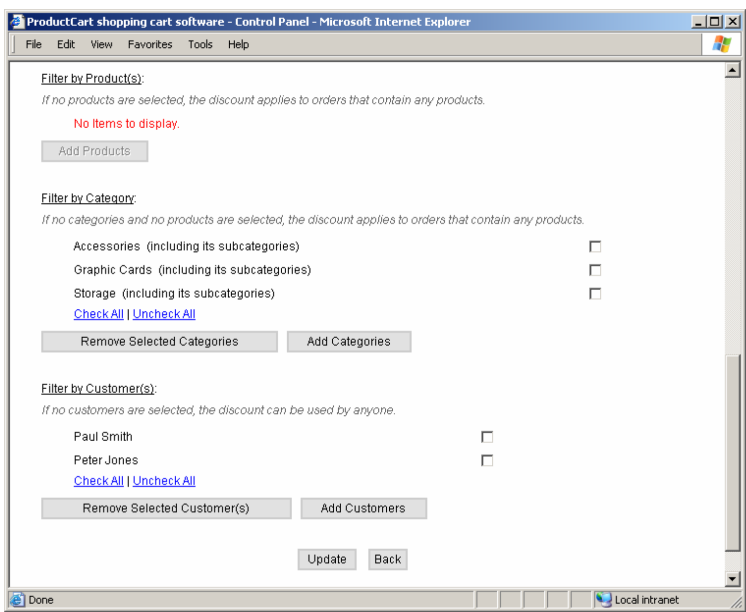
- **Quantity**. You can limit the validity of the discount to orders that fall within a certain quantity range (e.g. higher than 3, or between 5 and 10, etc.).
- **Weight**. Same as for the quantity, but calculated on the total weight of the order.
- **Order Amount**. Here the parameter is the total order amount (total products ordered). Typically, you would set a minimum dollar amount for the purchase, so that any order under the minimum dollar amount would not receive the discount. Shipping and handling charges (and any tax applied to them) are not considered part of the order amount.

  For example, let's say you set the order minimum at $50. If the customer adds products for a total of $40 to the shopping cart, and shipping and handling charges amount to $15, for a total of $55, ProductCart will not allow the customer to use the discount, because it will consider $40 as the order total.

  This is consistent with the behavior of most ecommerce Web sites.
- **Allow this discount code to be used with other discount codes?** You can decide whether the discount can be used with other discount codes or not. This applicable to a scenario where your customers may be in possession of more than one discount code, but you don't want certain coupons to be used simultaneously. For example, you may give customers the ability to obtain free shipping OR 10% off a purchase, but not both. Below is an example of two discounts applied to the order. The two discount codes must be entered separated by a comma. In this scenario, both discounts where set up to allow the use of the coupon with other discounts.

- **Filter by Product**. You can restrict the applicability of the discount to one or more products. To select a product, click on the *Add Products* button, check the products to which the discount should be applied, then click on the *Add to the Discount Code* button. You can later remove existing products or add new ones to the filter. If no products are selected, the discount applies to orders that contain any products, compatibly with the *Filter by Category* settings. If one or more products are selected, then *Filter by Category* is not available. So you can either use the *Filter by Product* or the *Filter by Category* features, but not both at the same time.

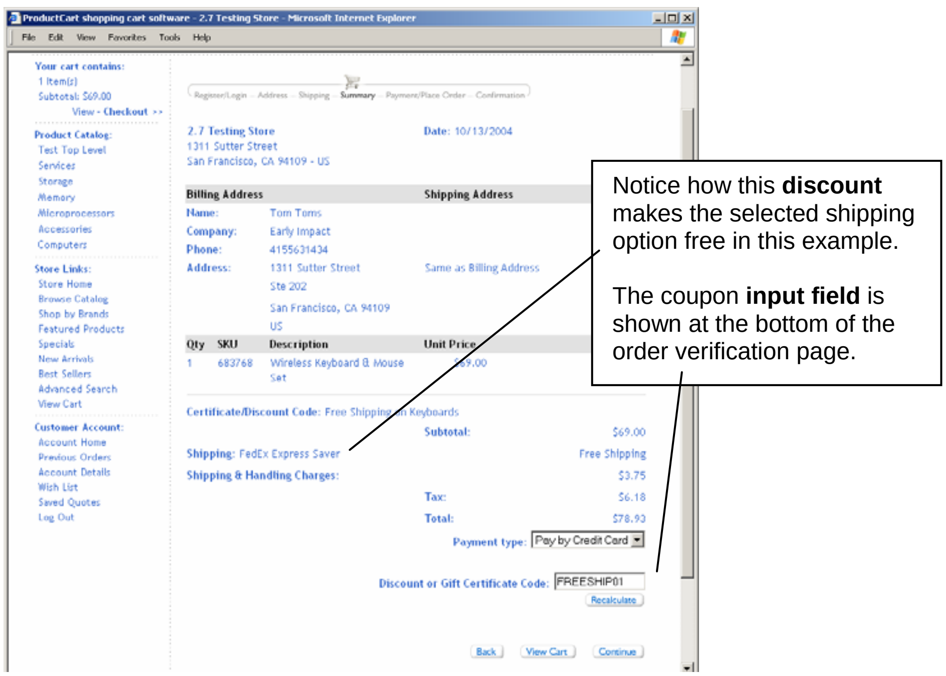
- **Filter by Category**. You can restrict the applicability of the discount to one or more categories of products. To select a category, click on the *Add Categories* button, check the categories to which the discount should be applied (to save time you can also select a parent category and opt to include all of its subcategories), then click on *Add to the Discount Code*. You can later remove existing categories or add new ones to the filter. If no categories are selected, the discount applies to orders that contain products from any category, compatibly with the *Filter by Product* settings. If one or more categories are selected, then *Filter by Product* is not available. Therefore, as mentioned above, you can either use the *Filter by Product* or the *Filter by Category* features, but not both at the same time.
- **Filter by Customer.** You can restrict the applicability of the discount to one or more customers. To select the customers that will be able to use the coupon, click on the *Add Customers* button, check the customer names, and then click on *Add to the Discount Code*. You can later edit the list of customers. If no customers are selected, the discount can be used by any customer that is in possession of the discount code. If one or more customers are selected, this also means that the coupon cannot be used by new customers, since their names by definition cannot be part of the list.



Discounts by Code allow you to implement a variety of scenarios, such as Coupons, Gift Certificates, Corporate Discounts, etc. By combining multiple filters and discount types, you can create a virtually endless amount of different coupons to promote more sales and attract new customers to your store. Here are just a few examples. Use your creativity to put this powerful feature to work for your business.

- You could reward customers that spend more than $50 on your store by granting them a **10% discount** on the purchase. The discount code in this scenario could be advertised right on your store's home page to motivate customers to place orders that exceed the amount set in the discount settings.

- **Corporate Discount**. Everyone that works at CompanyX gets 10% off. You could mail a discount certificate to the human resource department of that company and ask them to let all the employees know about it. In this example, the discount code would be printed on the letter sent to the company.
- **Repeat Customers**. You could add the discount code to the order confirmation e-mail that is automatically sent to your customers after they place an order, advertising that they'll receive $10 off the next order from your store by using the discount code. You could add extra filters to this coupon by limiting its applicability to orders above a certain amount, or only to products assigned to the category "Clearance", etc.
- **Preferred Customers**. You could create a coupon that is only for selected customers, and then email them the discount code. Only those customers will be able to use the coupon by logging into their existing accounts.
- **Free shipping on first order**. You could attract new customers by setting up a One-Time only coupon that gives them free shipping on selected services. Since the coupon is one-time only, it would only work for the first order.



- **Big Discounts on Clearance Items**. You could create a coupon that gives a large discount on selected, clearance items, then e-mail it to customers that have purchased those or similar products in the past. You can use the Newsletter Wizard to quickly create a list of customers that have purchased certain products from your store.
- **Tracking the Effectiveness of a E-mail Promotion**. You could create three different discount codes, all for the same amount (e.g. all three give 15% off). You could then use the different discount codes in three different e-mail messages sent to a sample of your customers. For example, assuming you have 1,000 customers, you could send each message to 100 of them. Since you can track sales by the discount code used for the order, you could easily determine which one of the three messages was the most effective.

You would then use that message to send the e-mail promotion to the remaining 700 customers. In this and other scenarios, discount codes can help you measure the effectiveness of a marketing campaign. Note that the discount codes do not necessarily have to be used as part of an e-mail campaign. They could also easily be printed on a mail piece, and used to track the effectiveness of a direct mail campaign.

- You could send a $10 **Gift Certificate** to all customers that have purchased more than $100 in the last year to encourage them to purchase again. You can obtain the list of customers that meet that requirement from the *Reports* module. Then you would create a $10 discount, with expiration after the first use, generate a code, and e-mail it to them.

  Feature limitation: The standard version of ProductCart does not allow customers to purchase a gift certificate for someone else. In addition, if they use only a portion of the discount, they cannot use the remaining portion at a later time. Given the strong demand for much more sophisticated tools to sell and manage Gift Certificates, a **new Gift Add-On** was made available in the fall of 2004. This module can easily be added to a Web store powered by ProductCart v2.7 and above, and provides advanced functionality with regard to the sale, delivery, and management of gift certificates.. Visit the Early Impact Web site for more information.

Quantity Discounts by Products

ProductCart allows you to associate tiered prices with any of your products. In other words, you can charge your customers different prices for different quantity levels. The price can also vary depending on whether the buyer is a retail or wholesale customer. You can create unlimited quantity discount tiers for each product in your product catalog.

With ProductCart v2.7 and above, you can define quantity discounts at two different levels:

- **Product**. When you define quantity discounts at the product level, as described in this section of this User Guide, the discounts only apply to the instance of the product purchased by the customer, and not to any other related product. For example, if a customer purchased 10 different CD's on a music store (one copy of each CD) and discounts were defined at the product level for those 10 products, with the first discount tier starting at 5 units (e.g. 10% off from 5 to 20 units), the customer would not receive any discount on the purchase. The customer would only receive quantity discounts on the order if he were to purchase 5 or more units of a particular music CD. Therefore, use *Quantity Discounts by Product* when you want to assign discount tiers to a specific product.

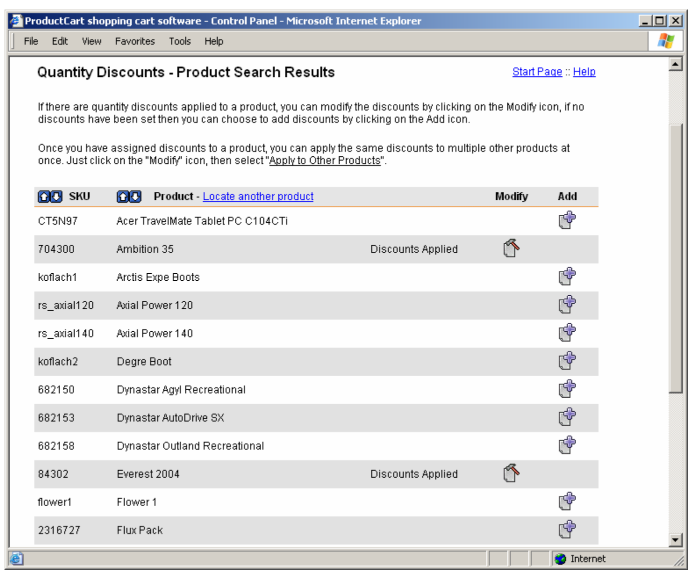
  Also note that if a customer purchases the same product, but selecting different options (e.g. t-shirt ABC size XL and the same t-shirt, but size M), the products are treated independently by ProductCart, and therefore quantity discounts are not calculated on the total amount, but rather on the individual amounts ordered. For example, if quantity discounts started at 4 units of those t-shirts, a customer purchasing 2 medium and 2 small t-shirts (same product, different sizes) would not receive quantity discounts.

- **Category**. When you define quantity discounts at the category level, as described in the next section of this User Guide, the discounts apply to the total products purchased for any given category. Continuing on the examples mentioned above, if a customer purchased 10 different CD's on a music store (one copy of each CD) and discounts were defined at the category level, with the first discount tier starting at 5 units (e.g. 10% off from 5 to 20 units), the customer would receive a discount both if he purchased 10 units of the same CD or 10 different CD's. Therefore, use *Quantity Discounts by Category* when you want to assign discount tiers to orders that contain any combinations of products for the category to which you assign the discounts..

Also note that if a customer purchases the same product, but selecting different options (e.g. t-shirt ABC size XL and the same t-shirt, but size M), this time quantity discounts are calculated on the total amount of units purchased, since by definition they belong to the same category of products. For example, if quantity discounts started at 4 units of this t-shirt, a customer purchasing 2 medium and 2 small t-shirts (same product, different sizes) would enjoy quantity discounts on his order.

This section focuses on *Quantity Discounts by Product*. The next section covers *Quantity Discounts by Category*. Many of the features work very similarly in both cases, and therefore would not be repeated in the second section. When products are added to the shopping cart, the system checks to see if a discount has been associated with the selected quantity, and if so, applies it to the product. The same is true when the quantity is recalculated on the shopping cart page.

To apply quantity-based discounts to a product, select *Specials /Discounts* from the navigation menu and then click on *Quantity Discounts by Product*. Next, locate the product for which you would like to apply quantity discounts. To do so, you can search for the product using the search field, or you can display all products in your catalog and browse through them. Products are sorted by name.



The Control Panel will indicate whether a product already has quantity discounts associated with it or not. If so, it will show the message: "Discounts Applied". Click on the *Modify* button to edit the discounts. If the product does not already have quantity discounts associated with it, simply click on the *Add* button.

The quantity discount that will be applied to the product can be:

- an absolute amount off the "on-line price" (e.g. $10 off the on-line price)

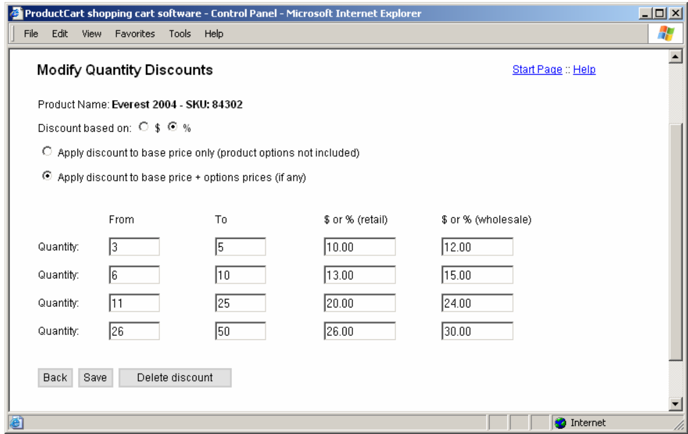
- a percentage off the "on-line price" (e.g. 20% off the on-line price)

In addition, you can decide whether to include product options in the discount calculation or not. For example, assume that you are an art gallery that offers posters both framed and unframed. The option "Framed" may add a certain amount to the total price for the poster that the customer is ordering. You can decide whether to include that amount in the calculation or not.

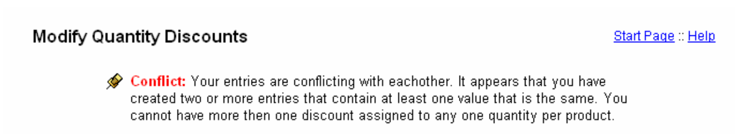
- If you do not want to include product options, then choose *Apply discount to base price only*
- If you want to include product options, if any, in the calculation, then choose *Apply discount to base price + option prices*

Then, enter the "from" and "to" quantity values for the first tier, specifying the discount value, both for retail and/or for wholesale customers. For example, your first "from" value could be 4, meaning that you start offering quantity discounts to your customers when they purchase 4 or more units of the selected product.

Once you have added the first tier, ProductCart will switch to a new display that allows you to define additional "to" values for the additional tiers. You will not need to define a "from" value for those fields as ProductCart will automatically calculate the "from" value by adding 1 unit to the "to" value of the preceding field. Just make sure that the "to" value is greater than the preceding one by at least 2 units.



Click on the *Edit* link to switch to editing mode. All the discount fields will now be available for you to edit. Each quantity tier must be uniquely defined. Therefore, when you edit a discount tier, make sure the *From* field value is always greater than the *To* field value in the preceding discount tier. When you are done editing the discount tiers, click on the *Save* button. If you make a mistake and assign values to the *To* and *From* fields that are in conflict with each other, ProductCart will not accept your entries, and will instead return the message shown below. When you edit the *From* and *To* fields again, make sure they adhere to the rule mentioned above.

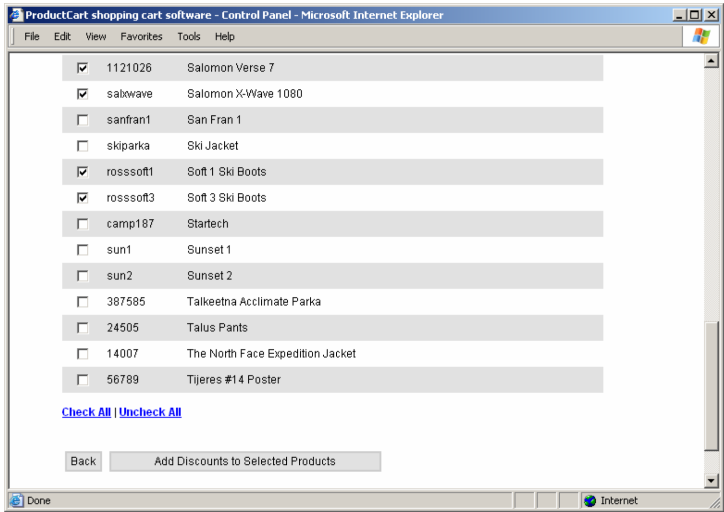


If you want to remove all quantity discounts from the selected product, click on *Delete Discount*.

Once you are done configuring quantity discounts for a certain product, you can easily assign the same discounts to multiple other products at once. For example, if all the different varieties of 2001 merlot on your wine store share the same discount structure, you can quickly assign the same quantity discounts to all of them at once.

Assigning Quantity Discounts to Multiple Products at Once

On the *Modify Quantity Discounts* page, click on the *Apply to Other Products* button at the bottom of the page. ProductCart will display a page that lists all products in your store, sorted alphabetically. You can easily reorder the products using the blue arrows at the top of the page. Select the products to which you would like to apply these quantity discounts, then click on *Add Discounts to Selected Products*. To select all the products at once, click on the *Check All* link located at the bottom of the page. Note that if any of the selected products already had quantity discounts assigned to them, they will be overwritten.

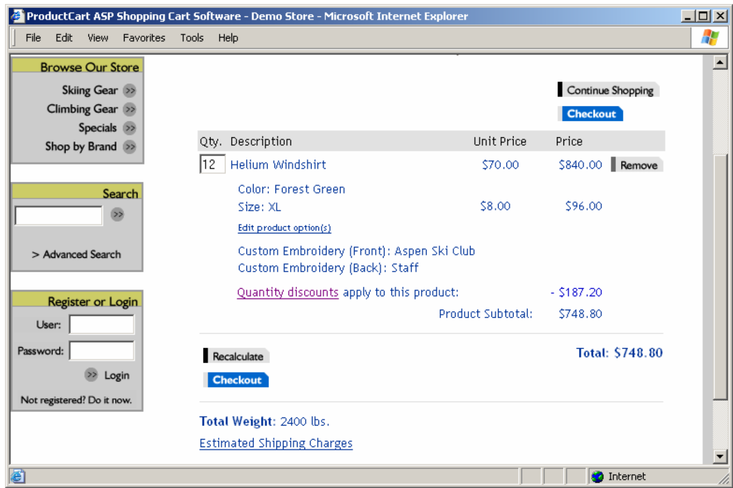


Note: When you edit an order that includes products to which quantity discounts apply, the discounts are NOT included in the recalculation if you change the ordered quantity, and the new quantity falls into a new discount tier. You will have to manually edit the unit price to reflect the new discount. Please see the *Managing Orders* section of this User Guide for more information about editing orders.

When quantity discounts apply to a product, they are displayed in many different pages in the storefront and throughout the checkout process.

- A link indicating that quantity discounts apply to a product is displayed on most of the browse and search pages (see example above). The link opens a pop-up window that lists all quantity tiers and the corresponding discounts. Retail customers will see retail discounts and wholesale customers will see wholesale discount values. When products are displayed horizontally on the catalog pages, this link is not shown.

- The product details page displays all discount tiers underneath the product image, organized in a table. See the Sample Product Display Page for a graphical example.



- The shopping cart page lists the total discounts applied to the order and features a link to the same pop-up window mentioned above. If the quantity purchased is recalculated, the discounts are recalculated accordingly. As mentioned earlier in this chapter, quantity discounts may or may not include the price differential that is associated with one or both product options. In the example shown above, the quantity discount was 20% and included the option price in the calculation. Therefore, the total discounts of $187.20 for the 12 units purchased was calculated as follows: ($70 + $8) * 0.20 * 12.
- Quantity discounts are similarly shown on the *Order Verification* page that is displayed to the customer during the checkout process, right before the payment selection page.
- The *Discount* icon shown in the storefront can be edited using the *Edit Store Icons* feature. You can change the *Quantity Discounts…* text link by editing the file ***includes/languages.asp*** as described in Appendix C.

Quantity discounts give you the ability to charge a lower price as the quantities go up, both with your retail and wholesale customers. The right price is automatically calculated when the product is added to the shopping cart. If a customer changes the quantity for the product and presses the *Recalculate* button, the correct price is once again located and used to calculate the total for the order.

Note that if your quantity tiers stop at a certain amount and a customer were to purchase an amount higher than the one specified for the last tier, no quantity discounts are given. Therefore, make sure your last tier includes an amount large enough to cover all orders.

Example - Dollar Amount

Let's assume that you have an on-line wine store and that you sell a certain bottle of wine for $20 (the *on-line price*). You may want to reward customers that buy the wine in large quantity. So you could set a dollar amount discount of $1 for people that buy from 5 to 10 bottles, $2 for customers that buy from 11 to 25 bottles, and so on. Let's also assume that your resellers buy the same wine at a wholesale price of $14 per bottle. You could give them a $0.50 discount if they buy from 5 to 10 bottles, $1.50 if they buy from 11 to 25 bottles, and so on.

Example - Percentage

Let's again assume that the on-line price for the same bottle of wine is $20. This time you could set the discount as a percentage of the on-line price. So you could set a 5% discount for people that buy from 5 to 10 bottles (*which in this case translates to a discount of $1*), 10% for customers that buy from 11 to 25 bottles (*which in this case translates to a discount of $2*), and so on.

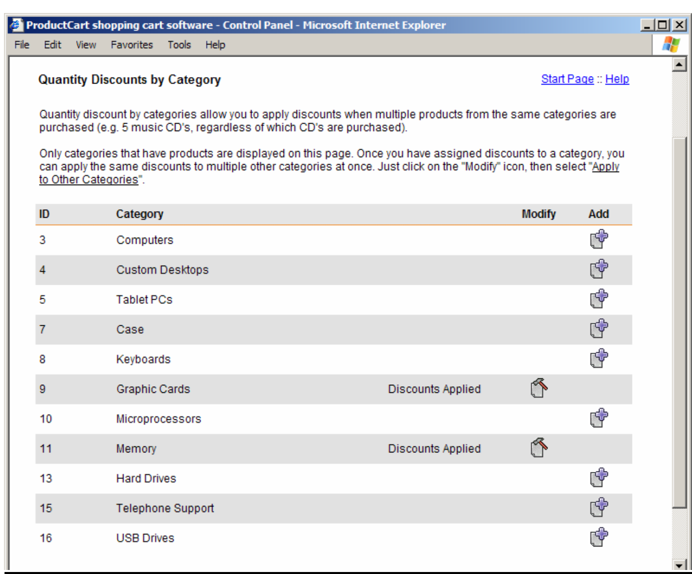
> **Note**: Applying percentage discounts allows you to keep the discount proportionally consistent even if you change the on-line price. For example, if the price for that bottle of wine went down to $15, the discount for an order of 5 to 10 units would automatically go down to 5% * $15 = $0.75. On the contrary, the discount would remain $1 (*which translated to a discount of 6.6%*) had you set it up as a dollar amount.

Quantity Discounts by Category

Quantity discount by categories allow you to apply discounts when multiple products from the same category are purchased (e.g. 5 music CD's, regardless of which CD's are purchased).

To apply quantity-based discounts to a category, select *Specials /Discounts* from the navigation menu and then click on *Quantity Discounts by Category*. ProductCart allows you to associate tiered prices with any category that contain products. If a category does not contain products, it is not shown on the category selection page (image below).

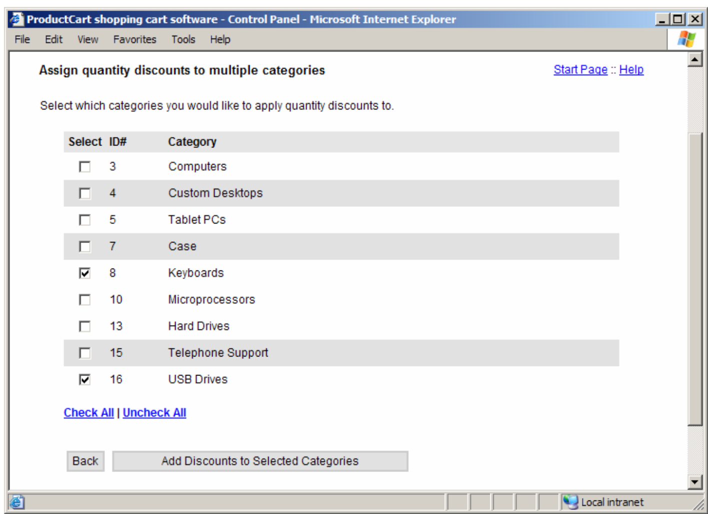
Just like with quantity discounts defined at the product level, you can charge your customers different prices for different quantity levels. The price can also vary depending on whether the buyer is a retail or wholesale customer. You can create unlimited quantity discount tiers for the products contained in the selected category.



Since configuring quantity discounts by category is very similar to setting quantity discounts by product, the following paragraphs will in many cases refer to the previous section of this User Guide, which covers quantity discounts defined at the product level.

Adding discount tiers to a category works exactly the same as adding discount tiers to a product. Refer to the previous section of this User Guide for details. The same is true when it comes to editing existing discount tiers.

Once you are done configuring quantity discounts for a certain category, you can easily assign the same discounts to multiple other products at once. On the *Modify Quantity Discounts* page, click on the *Apply to Other Categories* button at the bottom of the page. ProductCart will display a page that lists all categories that contain products and for which quantity discounts have not already been defined.. Select the categories to which you would like to apply these quantity discounts, and then click on *Add Discounts to Selected Categories*.



Note: When you edit an order that includes products belonging to a category to which quantity discounts apply, the discounts are NOT included in the recalculation if you change the ordered quantity, and the new quantity falls into a new discount tier. You will have to manually edit the unit price to reflect the new discount. Please see the Managing Orders section of this User Guide for more information about editing orders.

Unlike with quantity discounts defined at the product level, category-based quantity discounts are not shown in the storefront on the product details page, since the discounts are not specific to a certain product.

The shopping cart page lists the total category-based discounts applied to the order next to the order subtotal. If the quantity purchased is recalculated, the discounts are recalculated accordingly.

Reward Points: Overview

ProductCart's "Reward Points" module allows merchants to promote customer loyalty and increase sales by rewarding customers for purchases and for referring other customers. Reward Points used to be sold as a separate component, but it is now an integral part of all ProductCart versions (a $245 value).

The system allows store administrators to implement a marketing program that mimics the airline industry's popular 'miles' program. Customers earn points while making purchases or referring other customers, then redeem points for discounts and free merchandise.

Among Reward Points' unique features:

- **Points, miles, golden nuggets…** The merchant has full control on how the rewards program is implemented, starting with its name. Through an intuitive interface fully integrated with ProductCart's point and click Control Panel, the store administrator can assign a name to the program, which will be reflected anywhere across the on-line store.
- **Earning Points**. The merchant can easily assign points to products. The store automatically displays how many points each product will earn a customer, and shows a summary of total points for the order before and after the order is submitted. Customers can log into their account and view a summary of earned and used points at any given time.
- **Redeeming Points**. The merchant sets a conversion rate between points and dollars. A 20% conversion rate would mean that customers can redeem 100 earned points by deducting $20 from their next purchase on the store.
- **Promoting Word of Mouth**. Merchants can also allow existing customers to earn points when they refer other customers that make a purchase on the store. The amount of points earned on a referral can be a fixed amount or based on the new customer's order value.

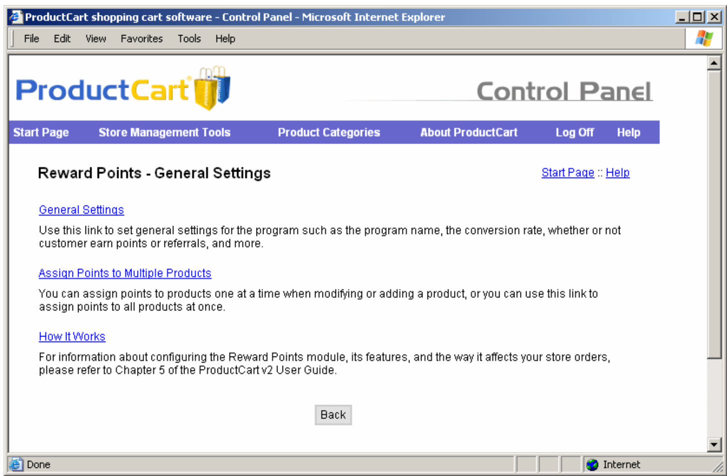
Configuring & Running 'Reward Points'

The first step in using ProductCart's Reward Points module is to configure its general settings using the *Specials & Discounts / Manage Reward Points* link in the ProductCart Control Panel. Before proceeding, please review the following definitions, which will be used throughout this chapter.

- **Reward Points –** Units that are assigned to products, and that customers accrue when making purchases and referring other customers (if this feature is enabled). They can only be positive integers. They can be called by any name: miles, credits, golden nuggets… That's up to you.
- **Conversion Rate –** The conversion rate sets the ratio at which points are translated into money by the system. How much should 100 points translate to? If the conversion rate were set to 100%, each point would translate to one dollar, and therefore 100 points would translate to 100 dollars. 150% means that each point translates into $1.50. 20% indicates that each point is equal to $0.20. And so on. Assign points to your products and set the conversion rate in a way that makes sense to your business.

- **Referral Points -** The Reward Points module allows you to reward customers for referring new, purchasing customers. Referral Points indicate how many points a customer receives when he/she refers a new customer to the store.

From the *Special/Discounts* menu, select *Manage Reward Points*. The Reward Points start page is displayed. Select *General Settings* to configure Reward Points.



General Settings

The *General Settings* screen allows you to set the following properties.

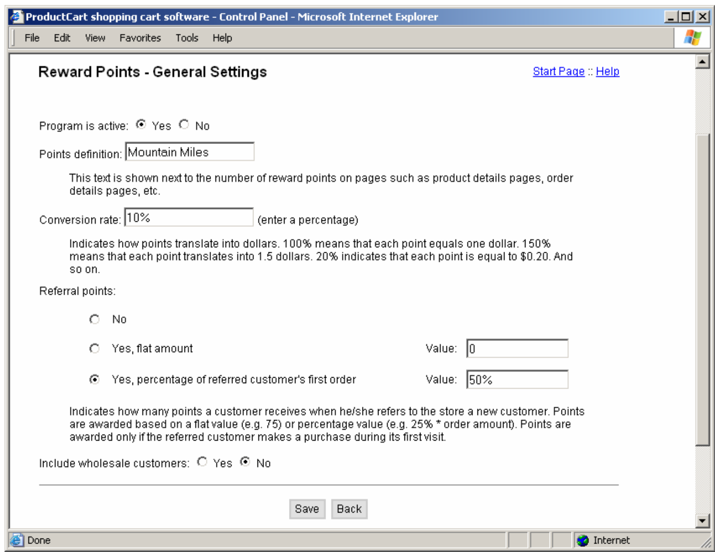
- **Program is Active**: You can turn the program on and off with just one click. Keep in mind that turning the program off will prevent existing customers from viewing and using their accrued points, so make sure to notify them if you do so.

  When the program is on, the following changes occur on your store. Correspondingly, these changes are not activated if the program is off.

  1. The **product details page** shows how many points the customer can accrue when purchasing that product. The message "You can earn N Reward Points on this product!" is displayed right below the product description, where N is the number of Reward Points assigned to the product, and "Reward Points" is the name assigned to the program, which can be modified as explained below. Note that this message is not displayed when a product is assigned 0 points. When you first install Reward Points on your Web sites, all products are by default assigned 0 points. See the section *Assigning Points to Products* for more information.
  2. If an existing customer, who has already accrued points and whose existing points balance is not zero, is checking out, the **checkout page** shows an additional field where the customer can enter points to use against the current purchase.
  3. The **order verification page** shows the number of points being accrued with the current purchase or the number of points being used against the current purchase. The first scenario always occurs with new customers, since they do not

have a points balance and therefore cannot use points against the current purchase. Both scenarios can occur with existing customers that do have a positive points balance. In other words, existing customers placing a new order can choose whether to use existing points to earn a discount on the purchase, or not use any points to earn points on the purchase.

4. The customer's **account management page** shows an extra link that allows the customer to view his/her points balance, its actual monetary value, and the total number of points used against purchases so far.



- **Points Definition**: This is the label that will be used everywhere points are mentioned on your store. So if you would like customers to earn "Frequent Shopper Credits" on your store, enter "Frequent Shopper Credits" here. The program name is mentioned on the following pages, among others: product details page, checkout page, order verification page, order confirmation e-mail, customer account management pages, and others.
- **Conversion Rate**: As mentioned above, the conversion rate defines how points are translated into dollars (or the currency your store is using). For example: a conversion rate equal to 100% would mean that each point equals one dollar; 150% would mean that each point translates into $1.50; 20% would indicate that each point is equal to $0.20. And so on.
- **Referral Points**: You can reward customers for referring other customers. Referral points can be awarded based on a flat value (e.g. 75) or percentage value (e.g. 25% times the order amount). Points are awarded only once per referred customer, and only if the referred customer makes a purchase during its first visit.
- **Include Wholesale Customers**: You can allow wholesale customers to accrue points or not. Typically, you will use this system only with retail customers, so by default this option is set to 'No'.

Assigning Points to Products

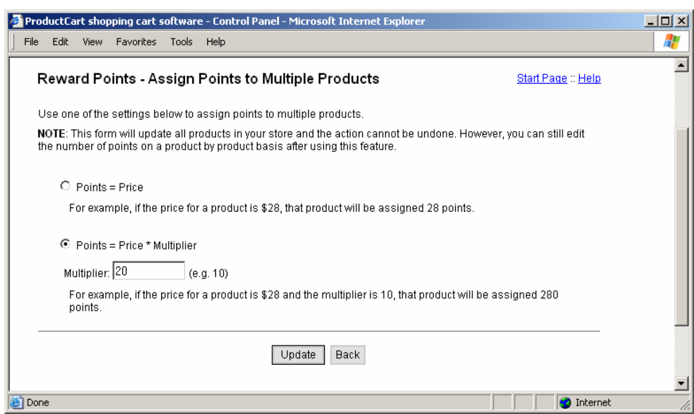
You can assign points to products in the following ways:

- By entering a number (must be a positive integer) in the "Reward Points" field on the product details page when adding a new product to your store. Points should be integers only: if you enter decimals, the number will be rounded off to the closest integer.
- By editing the number in the "Reward Points" field on the product details page when modifying an existing product or adding a product as a duplicate of an existing product.
- By using the feature "**Assign Points to Multiple Products at Once**", which can be accessed from the Reward Points start page.

  This feature allows you to assign points to ALL products in your store. Note that when you click on the *Update* button, the form will update ALL products in your store and the action cannot be undone.

  You have the option to assign points to all products based on two criteria:

  - **Points = Price**. Points will be assigned to all products based on a product's price. So if the price of a product is $50, that product will be assigned 50 points. If the price contains decimals (e.g. $49.95), the closest integer is used (e.g. 50 points would be assigned to this product).



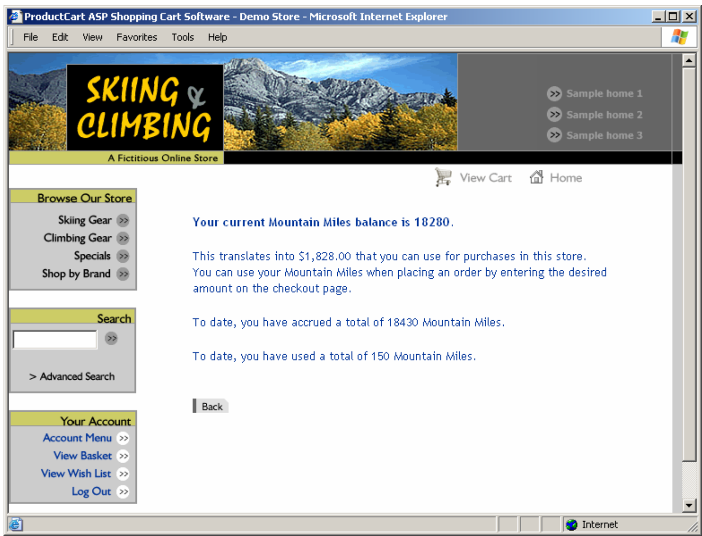
  - **Points = Price * Multiplier**. Points will be assigned to all products based on the product's price, times the multiplier. This allows you to award a large number of points, which can help increase the program's 'perceived value', even if the prices of your products are rather small. Make sure to adjust the *Conversion Rate* accordingly to ensure that when those large amounts are redeemed, they are correctly converted into your store's currency.

    For example, if you set the *Multiplier* at 10 and the *Conversion Rate* at 1%, a $100 purchase would assign the customer 1000 points, which the store would then translate into a $10 discount when the points are redeemed during a future purchase.

Viewing Points

When the program is active, customers will accrue points as they purchase products on your store, and when referring customers that make a purchase, if your store is using this feature.

Customers are notified of the number of points accrued with a purchase on the order verification page (before submitting payment information) and in the order confirmation e-mail (after an order is processed). They can also view the number of accrued points by logging into their account, and clicking on the *View Your Reward Points* link, where the words 'Reward Points' are replaced by the program definition entered on the *General Settings* page described above. When they do so, a page similar to the one displayed below is shown.



The page lists the following information:

- Current points balance
- Monetary value (points balance * conversion rate)
- Total number of points accrued to date
- Total number of points used to date

The store administrator can view any customer's Reward Points balance by using the *Manage Customers* section of the Control Panel. The customer details page allows the store administrator to view the current balance, and also edit it in case there is ever a need to do so.

Note the following regarding the accrual of Reward Points:

- <u>Points are accrued when an order is processed</u>. If an order is still <u>pending</u>, Reward Points are not assigned. Therefore, the customer will not see the points accrued with the order listed on the page shown above until the order has been processed by the store administrator. If the payment method used for the order is real-time credit card processing, then the order is considered processed as soon as it is confirmed by the payment gateway, and Reward Points will be assigned immediately.
- If an order is cancelled, the Reward Points accrued with the purchase are automatically deducted from the customer's account. If an order is returned, Reward Points are <u>not</u>

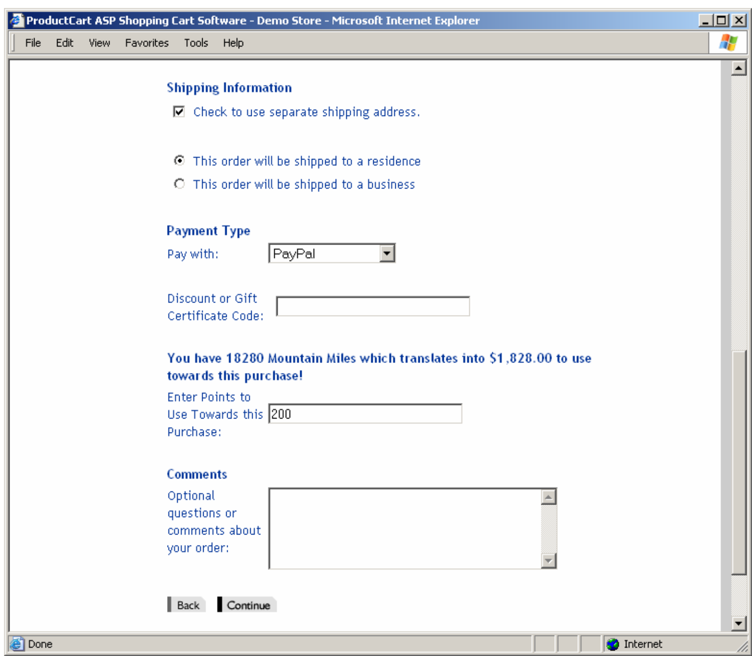
automatically adjusted. This is because ProductCart allows for partial returns, and therefore the system leaves it up to the store administrator to decide how many Reward Points, if any, should be deducted from the customer's account.

- As mentioned above, if for some reason points were not accrued correctly after an order was placed, or if points were not deducted correctly when used during a purchase, the store administrator may still change the number of points available in the customer's account by editing the customer's details through the *Manage Customers* feature.

Using Points

Whenever a customer has a positive points balance, he/she can use points to earn a discount on a new purchase. The discount that is applied to the purchase is determined by the equation: "points used * conversion rate". A customer may use some or all the points in his/her balance.

ProductCart automatically calculates how much money the available points balance translates to and provides the customer with such information both in the account management area and during the checkout process. Specifically, during the checkout process customers are prompted to indicate how many points they would like to use against a new purchase. A field is shown in the lower part of the checkout page, as shown below.



When a new customer is checking out, the current Reward Points balance is always equal to zero, and therefore the field shown above is never displayed.

Customers can choose to use all, some, or none of the accrued points against the current purchase. The following is a description of the shopping cart behavior in these three scenarios:

- **If customers elect NOT to use any points, they will earn points on the purchase**. The amount of points that they earn is determined by the shopping cart content and will be displayed on the order verification page, which is shown immediately after the shipping option selection window.

- **If customers choose to use some or all of their accrued points, they will receive a discount on the purchase** that is equal to the number of points that they elect to use, times the conversion rate. They will not accrue any points on the purchase. If the customer enters a number of points that translates to an amount that exceeds the total for the products ordered, the system automatically calculates the minimum number of points necessary to obtain free products (total for the products ordered = 0), and deducts that amount of points from the customer's points balance, instead of deducting the amount of points originally entered by the customer.

  Consistent with how most e-commerce stores handle the sale of free merchandise (e.g. instant rebate that makes the order = 0), **the discount is NOT applied to shipping, handling and payment fees**, and taxes are added to the purchase if the store administrator opted to include shipping and other fees using the *Tax Options* in the Control Panel. In other words, customers will still have to pay for shipping, handling and other fees, and for any taxes calculated on those fees, even in a scenario in which accrued points allow them to receive a discount that covers the cost of the products ordered.

  For example: assume that a customer were placing an order for products worth a total of $50, using enough points to receive a $50 discount, that shipping and handling charges amounted to $10 and that sales taxes were 5%, calculated on shipping fees too. The customer would end up being charged 0 for the products, but would be charged for shipping ($10) and taxes ($10 * 5% = $0.50). The total for the order would be $10.50.

- If customers enter a number of points that exceed their current balance in an attempt to receive a discount that exceeds the discount to which they have earned rights, the balance amount is used. So if a customer had 120 points in his account, but entered 200 in the accrued points input field during check out, the number of points used in the calculation would automatically default to 120 (the balance in the account).

The accrued points input field is NOT shown to a customer who is checking out:

- When the customer is a new customer, and therefore the points balance is zero
- When the points balance is zero. For example, a customer that has accrued points, but used all of them.
- When the customer is a wholesale customer and the program does not apply to wholesale customers. This is an option that can be set under *General Settings*.
- When the Reward Points system is turned off. This is also an option that can be set under *General Settings*.

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Chapter

6

Shipping Options

ProductCart includes a sophisticated shipping component, officially approved by UPS. ProductCart can calculate shipping charges in two ways: by connecting to one or more shipping providers (UPS, FedEx, USPS, Canada Post), or by using custom shipping rates that you define. In the first scenario, ProductCart dynamically collects shipping rates by connecting to one or more of the shipping providers mentioned above, which return rates that are based on: 1) the total weight of the products being purchased; 2) the "Ship From" address entered by the store administrator; 3) the customer's shipping address type (commercial vs. residential); and 4) the customer's shipping address. In the second scenario, shipping rates are calculated based on criteria that you define (custom rates).

For added flexibility, the shipping component allows you to **combine** custom shipping options with the rates returned dynamically by one or more of the above mentioned shipping providers.

Regardless of how they are calculated, available shipping options are displayed to your customers during check out. It may happen that no shipping options are displayed even if you did configure one or more shipping providers and/or custom shipping options. For more information about why this may be happening, review the section entitled *No Shipping Rates Returned*.

Another useful feature that your store customers will appreciate is the ability to "preview" shipping rates from the shopping cart page, before registering a new account or logging into an existing account.

Several, new shipping-related features were added to ProductCart with the v2.6 and v2.7 updates:

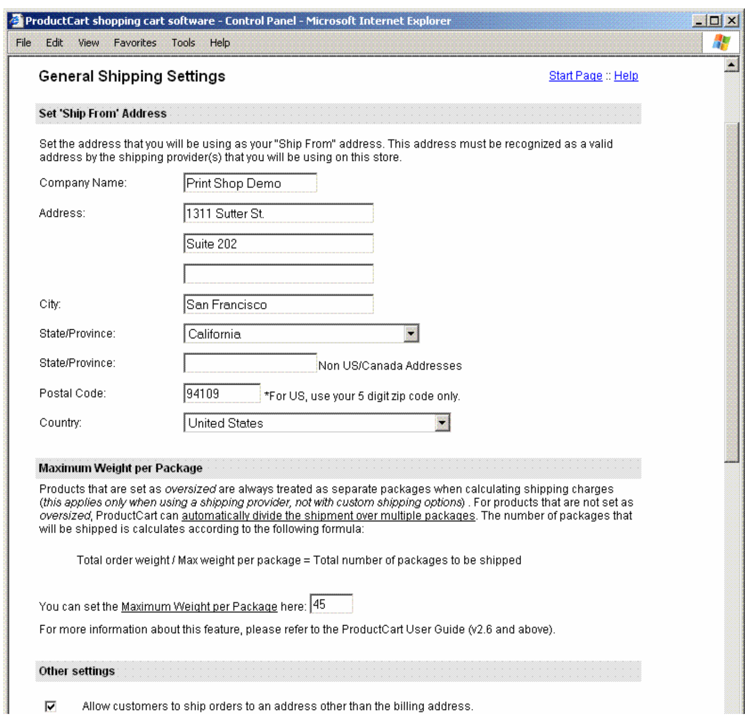
- The ability to handle multiple package shipments and have oversized products be automatically considered a separate package.
- The ability to handle shipping calculations on extremely light products (e.g. pins, business cards, electrical parts, etc.). This new feature was already addressed in the Adding New Products section of this User Guide.
- The ability to "flag" a product as an oversized item and consider it as a separate package when determining shipping charges for the order. When using UPS, the oversized feature also produces different shipping rates in accordance with UPS shipping rate tables.
- The ability to show shipping instructions or other messages related to choosing a shipping option on the shipping service selection page. The message shown can be easily added and edited through the Control Panel, and can be shown at the top or at the bottom of the page.

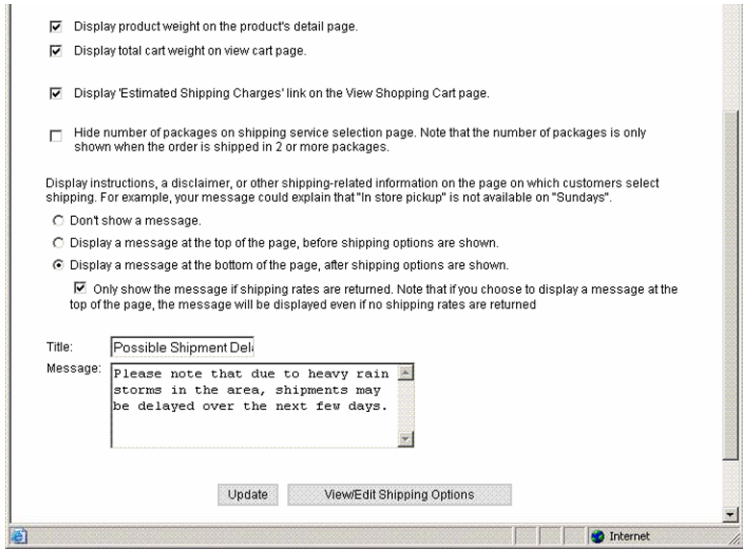
- More control on which shipping options are shown to customers during checkout. You can now set up a custom shipping option to only be shown to international vs. domestic customers.
- Finally, you can now show or hide the *Preview Shipping Charges* link in the storefront.

General Shipping Settings

In order to ensure the accuracy of the rates returned by the shipping providers used by the store administrator (if any), ProductCart requires that you specify the address from which orders will be shipped. This is what we refer to as the "Ship From" address. To do so, select *Shipping Settings* from the *Shipping Options* menu.

If the Ship From address is the same as the company address entered on the *Store Settings* page, you have the option to automatically populate the fields with those values the first time you visit this page. Otherwise, enter the location of the office or warehouse from which orders will be shipped. Make sure to use a valid postal code for the *Ship From* address, or it could cause problems when calculating shipping rates using a shipping service such as UPS or FedEx.





ProductCart v2.6 and above include the ability to set a **Maximum Weight per Package**. This feature allows you to avoid situations in which a shipping provider such as UPS or FedEx would not return shipping rates for an order because the order weight exceeded the maximum allowed weight per package. The weight limit is 150 Lbs for UPS shipments within the US and Canada (70kg elsewhere). The FedEx limit is 130 Lbs. So if a customer orders products for a total weight of 190 Lbs, what happens? ProductCart can automatically divide the shipment over multiple packages, similarly to what you will end up doing when you actually ship the order.

The number of packages that will be shipped is calculated according to the following formula:

Total order weight / Max weight per package = Total number of packages shipped

Going back to our example, let's say you enter 40 as the maximum weight per package. Since the total order weight is 190 pounds, ProductCart would automatically split the shipment as a combination of 4 packages weighing 40 pounds and one package weighing 30 pounds.

Products that are set as oversized are always treated as separate packages when calculating shipping charges. This is true regardless of their weight and of whether or not the *Maximum Weight per Package* feature is being used. The rationale behind this behavior is that oversized items are very often too big to fit into another package. Their weight is not necessarily what makes them oversized (e.g. think of a roll of bubble wrap).

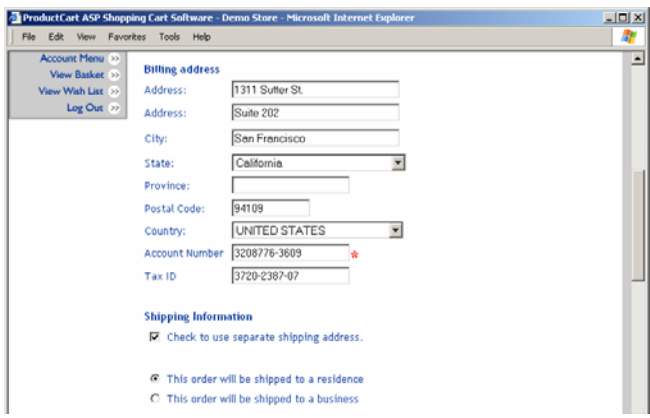
ProductCart will likely end up calculating shipping charges based on packages whose weights don't exactly match what you will end up shipping (e.g. the five packages might end up weighing 38, 42, 44, 37, and 29 pounds). Still, the calculation will be much closer to the actual shipping costs compared to either not being to calculate shipping rates at all for having exceeded a shipping service's weight limit, or calculating the shipment as a 1 package shipment.

If there is a discrepancy between the shipping charges calculated by ProductCart and the actual shipping charges for the order, and if you want the order amount to reflect the exact shipping charges, you can use the *Edit Order* feature, after the order has been placed, to adjust the final shipping amount that will be recorded when processing the order.

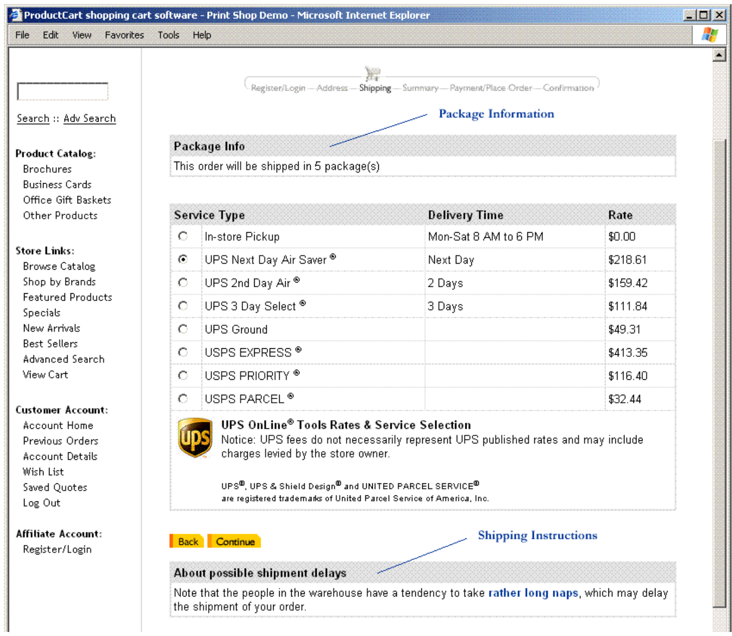
In the lower part of page you will find the following other settings:

- Allow customers to ship orders to an address other than the billing address. This feature allows you to decide whether to allow a customer to provide a separate shipping address for the order. If you don't check this option, customers will only be allowed to enter one address, which is the billing address. Therefore, any shipments will have to be made to the same address. Otherwise, customers will be able to select a check box on the checkout page that allows them to enter a separate shipping address. The separate shipping address can then be entered on a new window.

  When separate shipping addresses are added to the system, ProductCart saves them in a customer's account. Customers can manage (edit/add/remove) these alternative shipping addresses by logging into their account. When repeat customers checkout and opt to use a separate shipping address, any shipping address saved in their accounts can be selected from a drop-down menu.



- Display product weight on the product's detail page. Set whether to show the product weight on the product details page (pc/viewPrd.asp). The weight is shown at the top of the page, next to the part number.
- Display total cart weight on view cart page. Set whether to display the total order weight on the page where the shopping cart content is shown (pc/viewCart.asp).
- Display 'Estimated Shipping Charges' link on the View Shopping Cart page. Set whether to show a link to the pop-up window that calculates estimated shipping charges on the order. The link is shown on the View Shopping Cart page, at the bottom of the page. As always, you can edit the link text by editing that text string within the file *includes/languages.asp*.



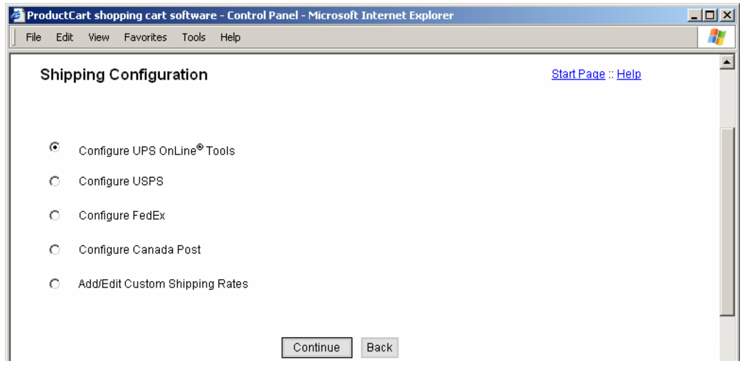
- Hide number of packages on shipping service selection page. Check this option if you would like to hide the section of the page that provides information about how many packages will be shipped. Note that the number of packages is only shown when the order is shipped in 2 or more packages.

- Display shipping instructions. You can have ProductCart display instructions, a disclaimer, or other shipping-related information on the page on which customers select a shipping option for their order.

  For example, your message could explain that "In store pickup" is not available on "Sundays". The message can be shown either at the top or at the bottom of the page, and can contain basic HTML tags. If you opt to show the message at the bottom of the page, you can opt to display it only if shipping rates are returned (e.g. if no shipping rates are returned, for any reason, the message is not shown).

Configuring Shipping Options

To start adding shipping options, select *Configure Providers* from the *Shipping Options* menu. ProductCart will guide you through the process of adding one or more dynamic shipping providers, and/or custom shipping options through a Wizard-style interface.



Let's start by looking at the dynamic shipping providers that you can connect to using ProductCart. We will then look at different types of custom shipping options that you can also setup on your store.

ProductCart supports the following shipping providers: UPS, USPS, FedEx, and Canada Post. The following is an overview of each of these services.

> **System Requirement**: To successfully connect your online store to a dynamic shipping provider, the Web server that hosts your Web site must have the Microsoft® MSXML Parser 3.0 SP2 (or greater) installed. ProductCart v2.6 and above are compatible with MSXML4 too. Otherwise, ProductCart will return a "No rates returned" message during the check out process (or only show some of the shipping options). If you are experiencing this problem, please contact your Web hosting company and ask them about the version of the XML parser installed on the server. The update to the latest XML parser is provided by Microsoft at no charge, so they may be willing to update the software.

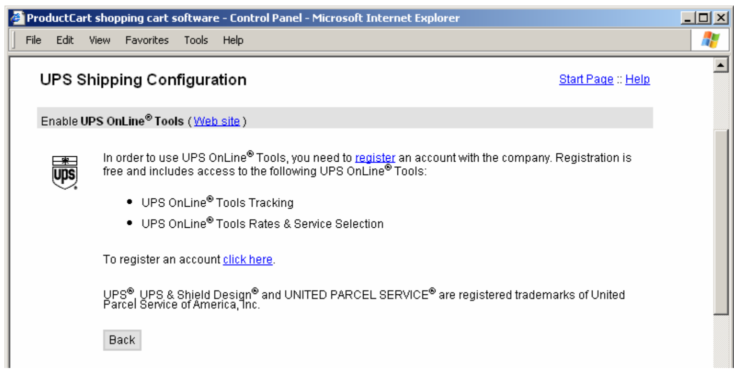
UPS Online® Tools

The integration of the UPS Online® Tools within ProductCart v2 and above has been officially tested and approved by UPS, which provides you with the piece of mind of knowing that rates are calculated accurately, and gives your customers additional features such as the ability to dynamically track shipped orders right from within your store.

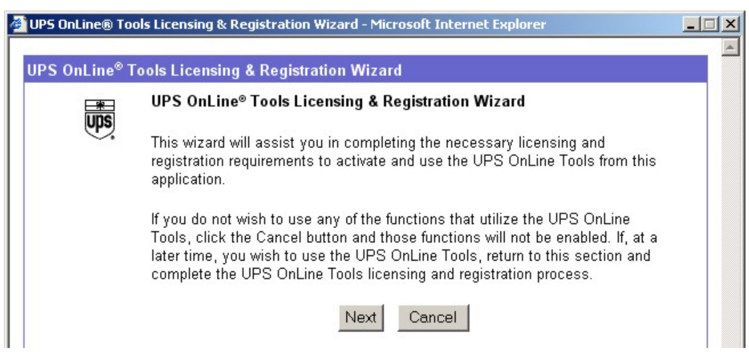
> **Feature Limitations**: Please note the following two limitations that affect the use of the UPS Online Tools in ProductCart. (1) You are required to have or sign up for a free UPS account for your business. You will be required to provide your UPS account number during activation of the UPS Online Tools. If you don't have an account, you will be able to request one while you are activating the UPS Online Tools. (2) UPS requires that its shipping services are not displayed together with competing shipping options. Therefore, you will not be able to activate UPS together with FedEx, the USPS, or CanadaPost. To activate UPS, you will have to disable all of the other shipping providers. If you have any questions about this requirement, please contact UPS

To activate UPS as a shipping provider on your store, select *Configure UPS Online® Tools* and follow the configuration Wizard. You will go through the following steps:

1. **Account Registration**. Thanks to the tight integration with the UPS Online® Tools, registering an online account with UPS is a seamless process in ProductCart. Note that this is not the UPS account that you may or may not already have to ship products with UPS. This refers to a different account that allows you to use the OnLine Tools. On the first screen of the UPS® configuration Wizard below, click on the *Register* link to start the registration process.

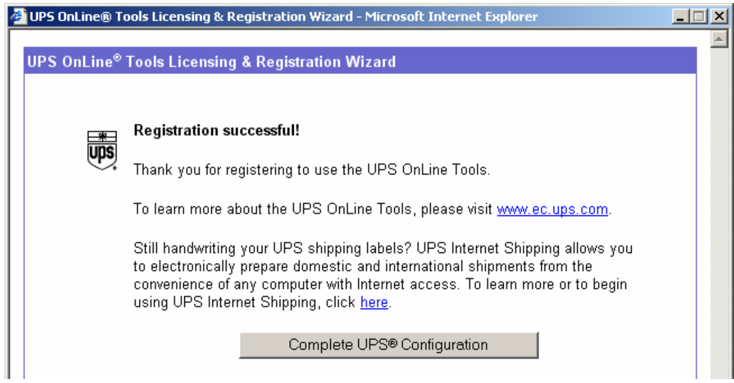


At this point a separate window will pop up, which will take you through the registration steps. On the first screen, agree to the license agreement and proceed to the next step.



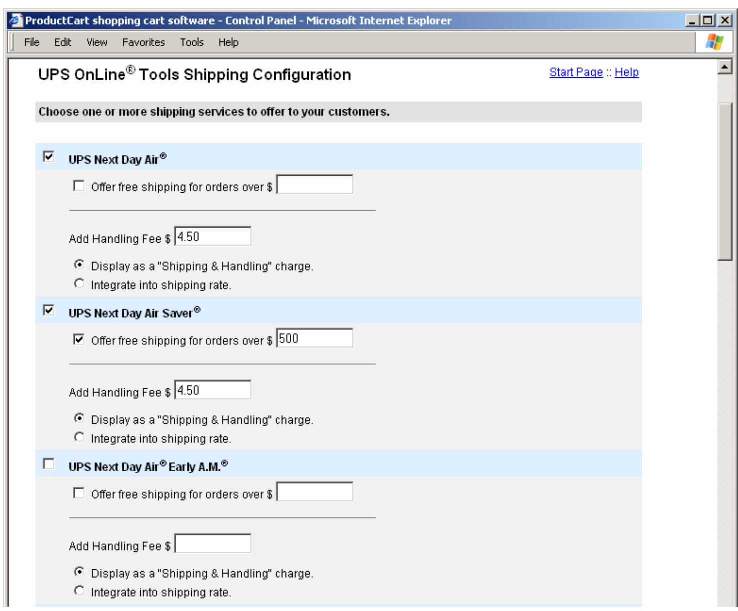
Then, enter your company information, your UPS Account Number, and answer the additional questions. Note that you are required to provide a UPS account number. If you don't have one, click on the corresponding link to be connected to the UPS Web site, where you can request one. Registering an account is free.

If the registration is successful, the following screen will be displayed.



Make sure to click on the *Complete UPS® Configuration* button to finish the registration process. When you do so, ProductCart will automatically close the pop-up window and return you to the shipping option configuration Wizard. Note that if the MSXML parser is not installed on the server, you will not be able to successfully complete this registration process. If that is the case, please review the system requirements included earlier in this section with regard to the MSXML parser.

Once the account registration process has been completed, the following window will be displayed.



2. **Service Selection**. Use this window to select which shipping services you wish to provide to your customers, among all the services that UPS® makes available to you. For each service, check the box next to the shipping service name to enable that option, then configure the following additional settings:

   a. Whether or not you wish to offer the selected service free to your customers when the order total exceeds a certain amount. If so, check the appropriate box and enter the order amount above which the selected service will become free.

b. Whether or not you wish to charge additional shipping and handling fees when customers select that particular shipping service. Enter the additional fee in the appropriate input field, then select whether you wish to display the fee as a separate shipping and handling charge, or rather to combine it with the shipping rate itself.

As you see, these settings are shipping service-specific. So, for instance, you may choose to make UPS Ground free for all orders that exceed $200, whereas all other services are never free regardless of the order amount. Similarly, you may wish to charge a shipping and handling fee on international orders, but not on domestic shipments.

3. **Customer Classification, pickup method and packaging type**. First, choose a *Customer Classification* from the three available selections. When you select a customer classification, the available selections in the Pickup Type drop-down menu change so that only those that are compatible with the selected classification are shown. Selecting the right classification is important as your *Customer Classification* does have an impact on the shipping rates shown on your store. If you are unsure of your classification, please contact a UPS representative.

   a. Select *Wholesale Classification* if you are billing to a UPS account and have a daily pickup.
   b. Select *Occasional Classification* if you do not have a UPS account or you are billing to a UPS account but do not have a daily pickup.
   c. Select *Retail Classification* if you are shipping from a retail outlet (e.g. you drop-off your packages at a local UPS Store).

Next, specify how your packages are picked up or delivered to UPS, and what type of packaging you typically use to ship your order. The available options change depending on the *Customer Classification* that you selected. If you are shipping oversized items, please the section of this User Guide that addresses the shipment of oversized items with UPS.

Both selections affect the rate calculation. The pickup/delivery types are:

- Daily Pickup
- UPS Customer Counter
- One Time Pickup
- On Call Pickup
- Letter Center/UPS Drop Box
- UPS Store/UPS Retail Location

The package types are:

- Your Packaging
- UPS letter
- UPS Tube
- UPS Pak
- UPS Express Box

If you select “Your Packaging”, then enter the dimensions of the typical package that will be used to ship your orders (height, width, and length). Keep in mind that *Length* should always be the longest side of the package.

Why are the rates different?: All of the settings mentioned above affect the rates that UPS returns on the order. The integration of the UPS Online® Tools within ProductCart has been officially approved by UPS, so the rates are typically returned very accurately. If the rates that ProductCart is returning on an order are different from the rates that you are getting when simulating the same shipment on the UPS Web site, please make sure that you are using the exact same parameters (type of pickup, package size, total weight, type of delivery address). If no shipping rates are being shown, please see the *No Shipping Rates Returned* section of this User Guide for more information on what could be the cause.

4. **Summary**. At this point ProductCart will display a summary of the options selected for this and other service providers that have been activated on the your store. From here you can edit existing settings and add new shipping options.

UPS Online® Tools Usage Policy: Please note that when you started using ProductCart, you have agreed to the following, as part of the ProductCart End User License Agreement.

ProductCart includes source code that allows You to integrate Your store with UPS' Online Tools, which is a set of shipping and tracking services provided by UPS for Internet merchants. This source code has been encrypted in compliance with UPS' Online Tools usage policy. You may not for any reason decrypt any encrypted source code. Any attempt to use any technology to decrypt or otherwise reverse-engineer and/or subsequently modify any of the encrypted source code violates both this End User License Agreement and UPS Access User Agreement that you will enter into before use of the UPS Online Tools and will result in the immediate termination of this License Agreement and may result in the termination of the UPS Access User Agreement and your right to use the UPS Online Tools.

Shipping Oversized Items with UPS

ProductCart's new integration of the UPS Online® Tools gives you the ability to accurately calculate shipping charges on oversized items. For example, a shipping supplies store that sells bubble wrap would be undercharging customers if it calculated shipping charges based on the weight of the order, due to the large physical dimensions of the box that contains the bubble wrap. Similarly, a gallery that sells large paintings would find itself in the same situation.

UPS charges different rates for items that exceed a certain dimension. There are two types of oversized packages (length is always the longest side of a package or object):

1. A package is considered "Oversize 1" (OS1) when all of the following conditions apply:
   a. The package's combined length and girth[7] exceeds 84 inches.
   b. The package's combined length and girth is equal to or less than 108 inches.
   c. The package's actual weight is less than 30 pounds.

   For each OS1 package, the billable weight is 30 pounds.

[7] Girth is the distance all the way around the package or object at its widest point perpendicular to the length. It can be calculated as (width * 2) + (height * 2). "Length" is always the longest side of any package.

2. A package is considered "Oversize 2" (OS2) when all of the following conditions apply:
   a. The package's combined length and girth exceeds 108 inches.
   b. The package's actual weight is less than 70 pounds.

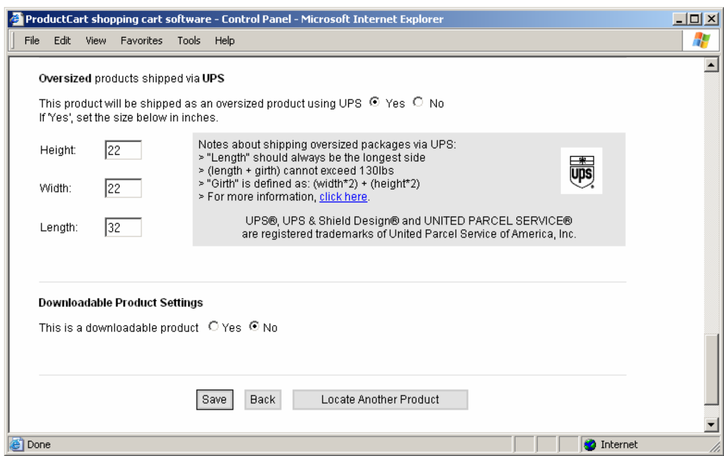
   For each OS2 package, the billable weight is 70 pounds.

The maximum length per package is 108 inches or 270 centimeters. The maximum allowed size per package is 130 inches or 330 centimeters in length and girth combined.

For updated information on the definition of oversized packages, please visit the following URL:

http://www.ups.com/using/services/packaging/oversize-guide.html

When you activate UPS as one of the shipping providers used on your store, ProductCart will show you an additional set of fields in the *Add/Modify Product* pages. Specifically, in the lower part of the page, you will notice an area similar to the screen displayed below.



On a product by product basis, you can set whether a product is oversized or not. When you set this option to *Yes,* ProductCart ignores the default package size entered when you originally configured UPS as a shipping provider on your store, and instead uses the package dimensions that you enter on this page.

If you think that a product "may be" oversized, but you are not sure, go ahead and set this option to *Yes*. ProductCart is simply passing parameters to UPS, so if the package ends up not being oversized, UPS will return the correct rate for that package. Once again, setting a product to *Oversized* makes ProductCart replace the default package size with the dimensions entered here.

> **Troubleshooting Oversized Items**: If you are not getting any rates when testing the purchase of an oversized item through ProductCart, check to see if the product is exceeding the maximum allowed size as defined on the previous page. Also, make sure that the product is not exceeding the maximum allowed weight, which is 150 Lbs for shipments within the US and Canada (70kg elsewhere). The weight limit is 70 Lbs for oversized items.

United States Postal Service (USPS)

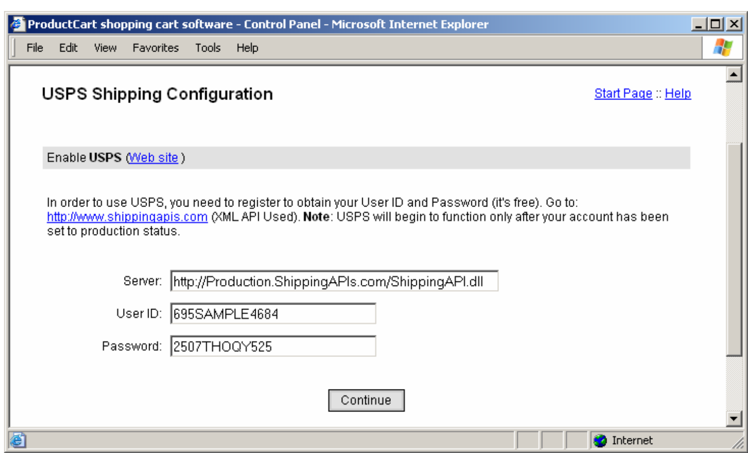
To activate the US Postal Service as one of the shipping providers used by your store, follow the steps outlined below.

1. **Registration**. First, you will need to register an account at the following address: http://www.shippingapis.com - Upon registration, you will receive an e-mail from the USPS containing a user name and a password. It will also contain a test URL that should be identical to the one shown below. In the code below, replace 'myusername' with your user name and 'mypassword' with your password. Then, copy and paste the entire URL into your browser address field and load the page. Some rates should be returned. The URL code is:

```
http://testing.shippingapis.com/ShippingAPITest.dll?API=Rate&XML=<RateRequest
USERID="myusername" PASSWORD="mypassword"><Package
ID="0"><Service>EXPRESS</Service><ZipOrigination>20770</ZipOrigination><ZipDestination>2
0852</ZipDestination><Pounds>10</Pounds><Ounces>0</Ounces><Container>None</Containe
r><Size>REGULAR</Size><Machinable></Machinable></Package></RateRequest>
```

2. **Switch to Production Mode**. Now contact the USPS at the address specified in the e-mail message that you received after registering and ask them to switch your account to production mode. <u>Your store will NOT be able to obtain shipping rates from the USPS until your account has been switched to production mode</u>.

3. **Enter Account Information**. At this point you can return to ProductCart and start the USPS configuration process, which is similar to the one described for UPS. On the screen shown below, enter your user name, your password and the link to the production mode URL, which should be: http://production.shippingapis.com/ShippingAPI.dll

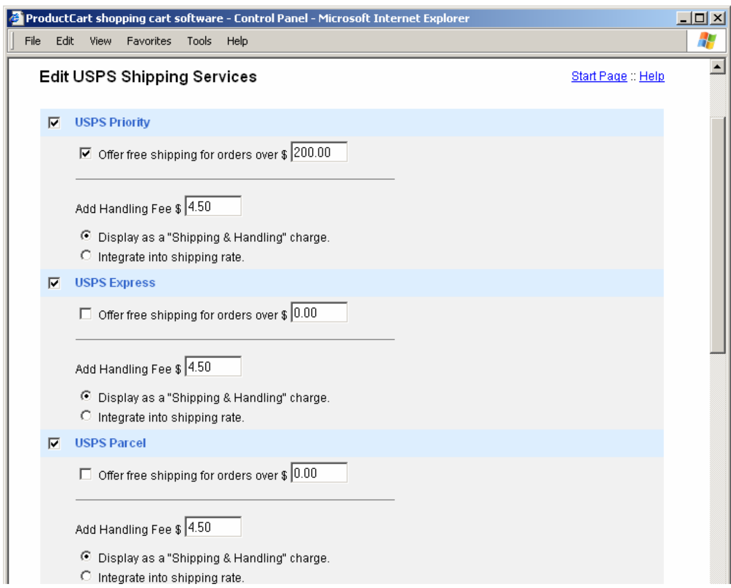


4. **Service Selection**. Next, select which shipping services you wish to provide to your customers, among all the services that the USPS makes available to you. For each service, check the box next to the shipping service name to enable that option, then configure the following additional settings:

    a. Whether or not you wish to offer the selected service free to your customers when the order total exceeds a certain amount. If so, check the appropriate box and enter the order amount above which the selected service will become free.

b. Whether or not you wish to charge additional shipping and handling fees when customers select that particular shipping service. Enter the additional fee in the appropriate input field, then select whether you wish to display the fee as a separate shipping and handling charge, or rather to combine it with the shipping rate itself.

As you see, these settings are shipping service-specific. For example, you may choose to make Priority Mail free for all orders that exceed $150.



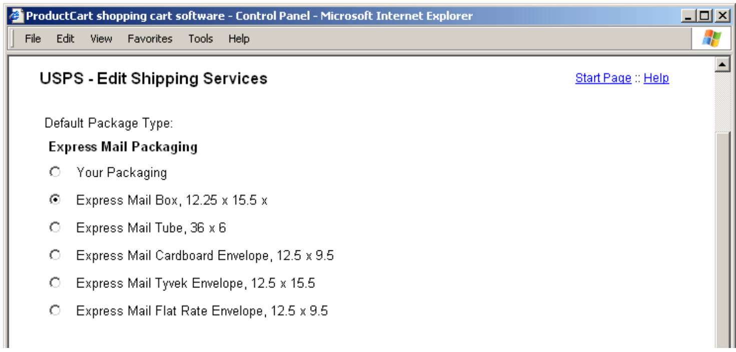
5. **Packaging Type**. The next screen will ask you to select the packaging type used for the selected services. The USPS allows customers to use special boxes that apply specifically to two of its services (Priority Mail and Express Mail). For these and all other services you may also use your own packaging: specify a default package size here.

   ProductCart v2.6 and above extend the *Oversized* feature to shipping rate calculation via the USPS. So when you add or modify a product, you can enable the *Oversized* option, which will have the following three consequences on shipping rates calculation:

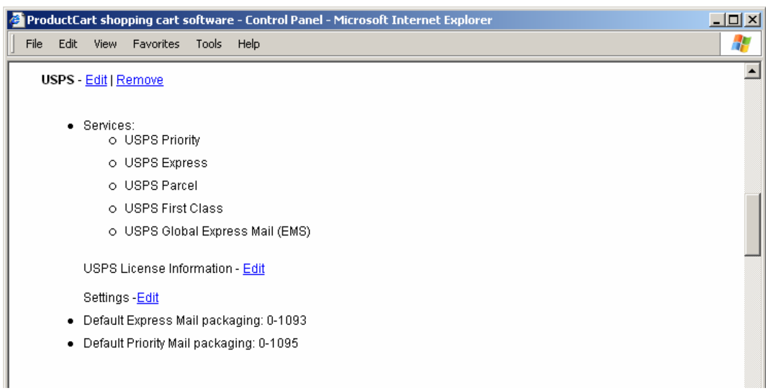
   a. The product will be flagged as *Oversized* (this may trigger extra shipping charges).

   b. The product-specific package dimensions entered on the add/modify product page will replace the default package size mentioned above.

   c. The product will be regarded as a separate package (e.g. if a customer purchases 3 units of the product, ProductCart will calculate rates for 3 separate packages).



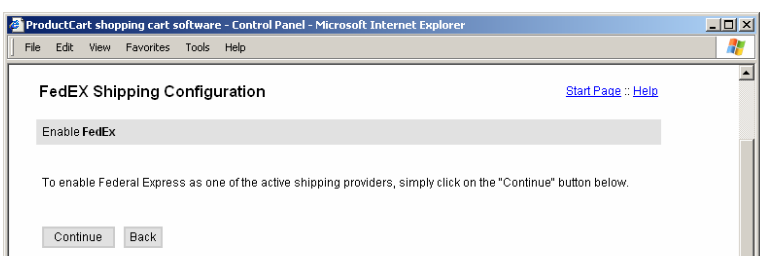
6. **Summary**. A summary page will provide a list of services that have so far been configured on the store, links to edit and/or remove them, and links to add new shipping options.



Federal Express

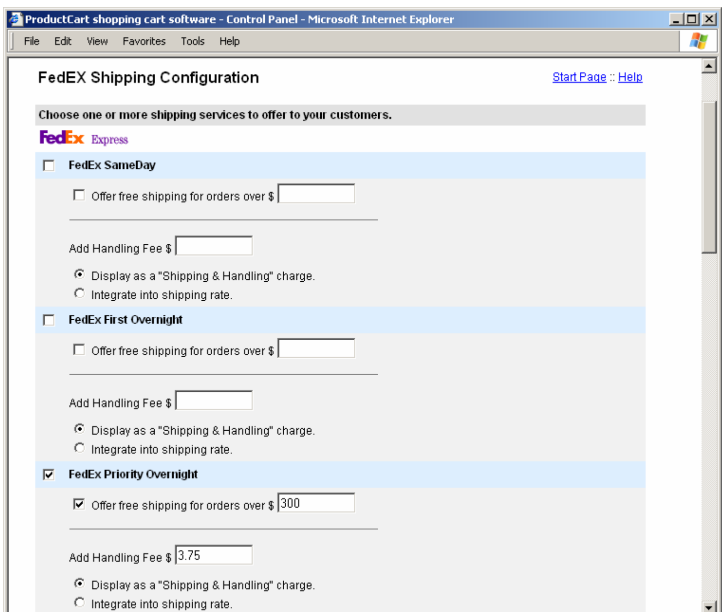
To activate FedEx as one of the shipping providers used by your store, follow the steps outlined below.

1. **Registration**. No registration is required. Simply click on the *Continue* button.

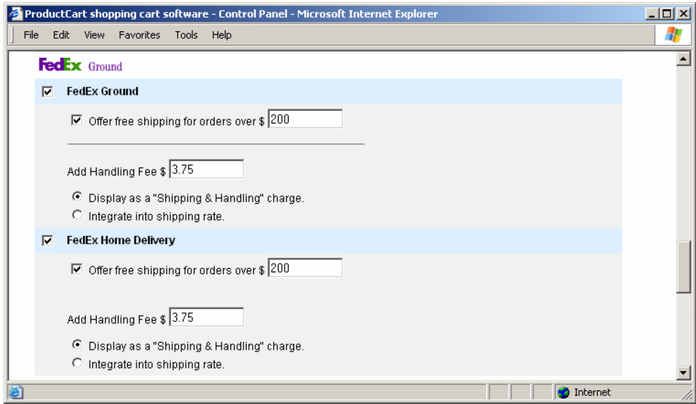


Technical Note: At this time Federal Express® does not have an Application Programming Interface (API) that applications like ProductCart can connect to, (unlike UPS®). The company has informed us they are actively working on it. ProductCart will participate in this program and start using the FedEx API as soon as it is available (second quarter of 2004, according to Federal Express®). Because ProductCart currently retrieves rates from the FedEx.com Web site, rather than a published API, whenever changes are made to the way rates are handled on the FedEx.com Web site, such changes affect ProductCart. If all of a sudden your online store stops retrieving rates from FedEx, this may be the reason. In such a scenario, please visit the ProductCart Support Center and submit a support request. Updated files are typically published on the Support Center shortly after we are notified of the changes.

2. **Service Selection**. Similarly to the case of UPS and the USPS, you can select from a variety of shipping services provided by FedEx, and for each of them, you can specify an order amount above which a service would be provided to your customers for free (e.g. Free FedEx Ground for all orders that exceed $100), and additional shipping and handling fees.



If you plan to use ground delivery options, make sure to select both FedEx Ground and FedEx Home Delivery. The former is used to deliver packagers to commercial addresses, the latter to residential addresses. If you only selected one of the two, and a customer on your store specified an address type that is not compatible with the service you selected, no rates would be returned. For example, if you only checked FedEx Ground, and a customer indicated that his/her shipping address is *Residential*, no ground rates would be returned.



3. **Packaging Type**. Also similarly to UPS and the USPS, you have the ability to select the type of package that your orders are typically shipped in.

   If you are using your own packaging to ship products, specify a default package size using the appropriate input fields, and considering the following information provided by FedEx. This size should be the most common size for the majority of packages that you ship.

   Packages are measured as package length plus girth:

   (length + ((width x 2) + (height x 2)))

   A package weighing less than 30 lbs. and measuring more than 84 inches and equal to or less than 108 inches in combined length and girth will be classified as an Oversize 1 (OS1) package. The transportation charges for an Oversize 1 (OS1) package will be the same as a 30-lb. package being transported under the same circumstances.

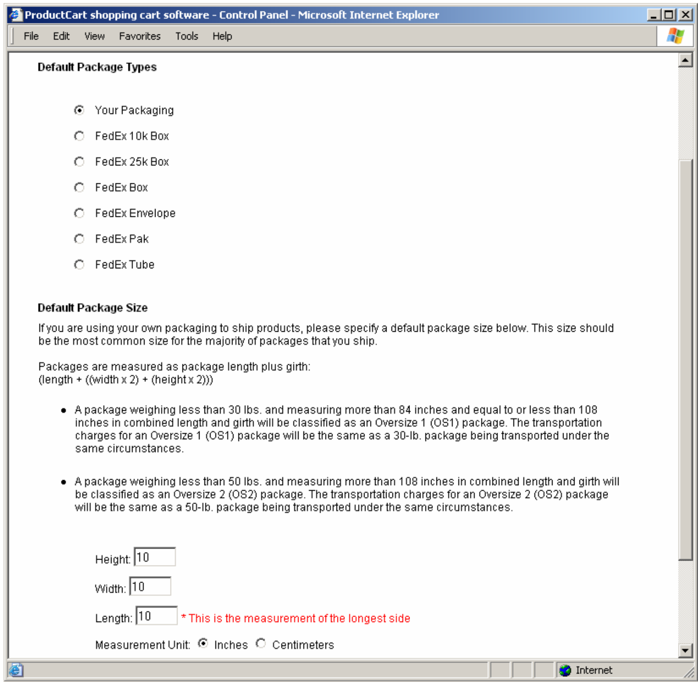
   A package weighing less than 50 lbs. and measuring more than 108 inches in combined length and girth will be classified as an Oversize 2 (OS2) package. The transportation charges for an Oversize 2 (OS2) package will be the same as a 50-lb. package being transported under the same circumstances.

   ProductCart v2.6 and above extend the *Oversized* feature to shipping charges calculation via FedEx. So when you add or modify a product, you can enable the *Oversized* option, which will have the following three consequences on shipping rates calculation:

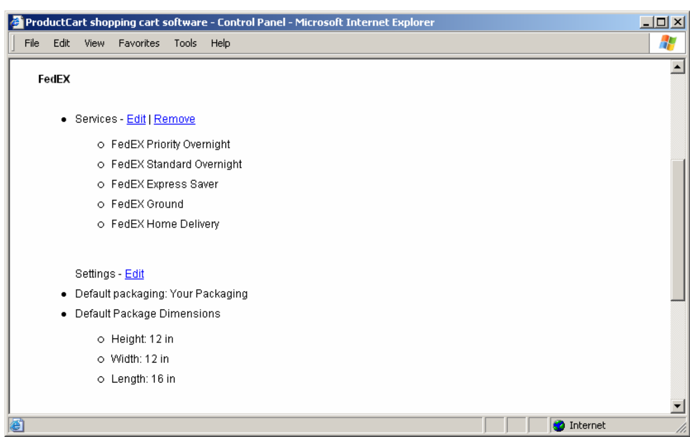
   a. The product will be flagged as *Oversized* (this may trigger extra shipping charges).

   b. The product-specific package dimensions entered on the add/modify product page will replace the default package size mentioned above.

   c. The product will be regarded as a separate package (e.g. if a customer purchases 3 units of the product, ProductCart will calculate rates for 3 separate packages).



4. **Summary**. The shipping option summary page will now display FedEx services as well. As mentioned before, from here you can edit each service, remove services or add new ones. You can also change the default packaging type.



Canada Post

To activate Canada Post as one of the shipping providers used by your store, follow the steps outlined below.

1. **Registration**. First, apply for a "Shipping Profile" with Canada Post. To do so, send an e-mail request to eparcel@canadapost.ca. Make sure to include your company name, a contact name, and a telephone number.

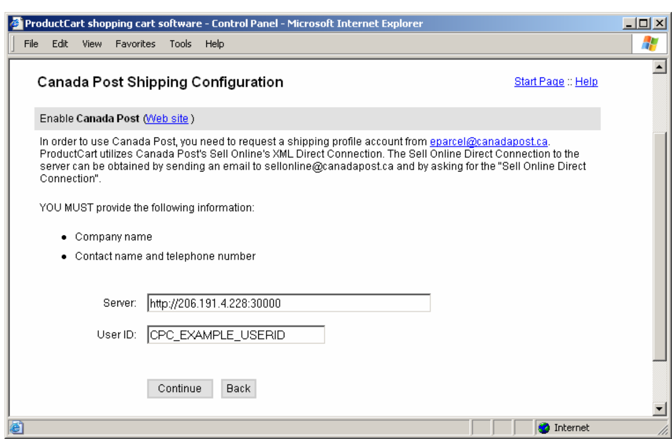
2. **Request "Sell Online Direct Connection"**. ProductCart utilizes Canada Post's Sell Online's XML Direct Connection. To use the system, you need to request authorization to use a Sell Online Direct Connection to the Canada Post server. This can be obtained by sending an email to sellonline@canadapost.ca and by asking for the "Sell Online Direct Connection". Canada Post will reply with a message containing a User ID and a password that you will need in order to edit your Shipping Profile (see below) and activate the shipping provider on ProductCart.

3. **Edit Shipping Profile**. Your Shipping Profile was set up as a generic profile and populated with default values. These values must be modified to match your actual shipping address and company information before you can use the system. To update your Shipping Profile, visit the Sell Online Shipping Module section of the Canada Post Sell Online Web site, located at the following address (log in with the User ID and password that you received via e-mail from Canada Post):

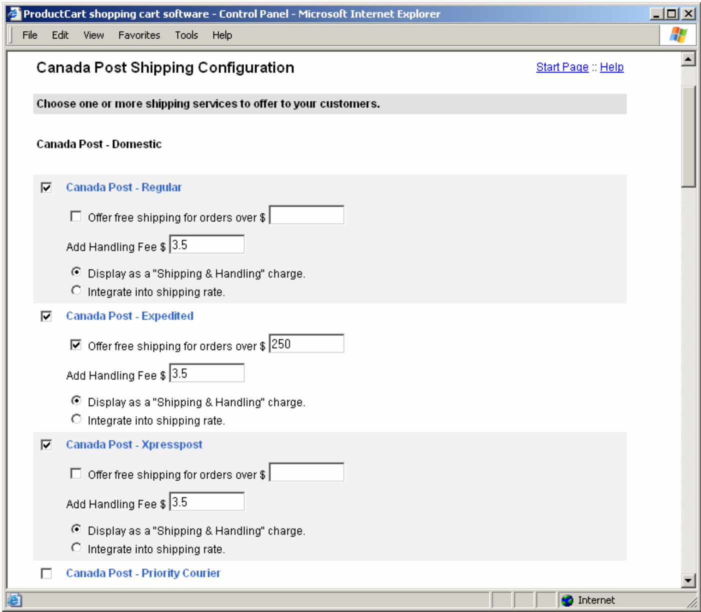
   http://206.191.4.228/servlet/MerchantInformationServlet

   After you log in, a menu with several links will be displayed. The only area that you need to edit is the *General Information* section. When entering your Canadian postal code on that page, make sure to enter a 6 digit code with no spaces. You do not need to edit the *Shipping Services, Boxes,* and *Handling Fees* sections because these values will be configured directly through ProductCart.

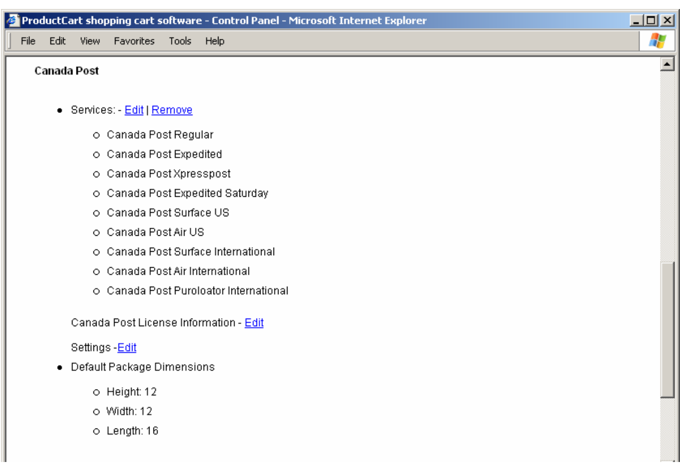
4. **Activate Canada Post**. You are now ready to activate Canada Post within ProductCart. On the initial screen (shown below), enter your User ID and the following testing server address: http://206.191.4.228:30000. Once you are done testing the system, you will need to contact Canada Post again and request to have your account moved to production mode. At that time you will be given the address of a production server and will replace the testing address entered here with the production server address.



5. **Service Selection**. Next, select from a variety of shipping services provided by Canada Post for shipment within Canada, from Canada to the United States, and from Canada to other International locations. As with all other shipping providers, for each shipping service that you select, ProductCart allows you to specify an order amount above which the selected service will be provided to your customers for free, and additional shipping and handling fees.



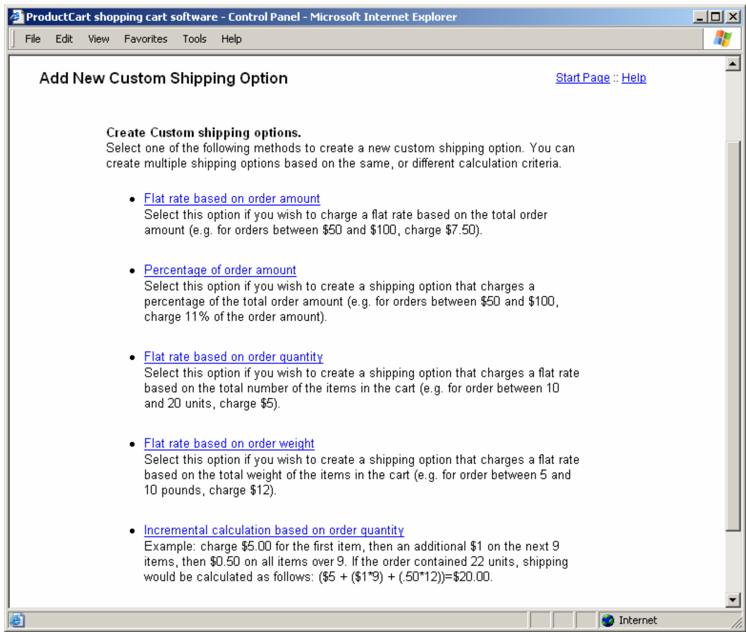
6. **Packaging Type**. Next, enter the standard sizes of the package that is typically used to ship your orders. When you are done, click on the *Submit* button to complete the Canada Post configuration.
7. **Summary**. The shipping options summary page now displays a list of the Canada Post shipping services that you have selected with links to add, edit or remove any of its settings. To change the server address from the testing server to the production server, click on the *Edit* text link next to *Canada Post License Information*.



Custom Shipping Options

ProductCart supports a variety of custom shipping options based on the weight, quantity, or total dollar amount of products ordered. Custom shipping options can be used in combination with the shipping rates dynamically provided by one or more of the supported shipping providers. Of course, they can also be used on their own.

For example, an online store may allow customers to have orders shipped via UPS Ground, UPS Next Day Air®, or have orders picked up at its retail store location. How can you setup your store to do this? With ProductCart it's quick and simple: just set up the two shipping services with UPS, and then add a custom shipping option called "Customer Pickup" that applies to all orders (e.g. amount $0 to $9,999,999) and has a $0 rate.



ProductCart v2.7 and above support the ability to restrict a shipping option only to domestic customers or only to international customers. If a shipping option is limited to international customers, when a domestic customer visits the store, that shipping option is not shown. If a shipping option is limited to domestic customers, when an international customer visits the store, that shipping option is not shown. Of course, shipping options can also be set so they are shown to both.

International customers are considered all customers whose ship-to address is for a country other than the one where the store is located (the one specified in the *Shipping Settings* page).

ProductCart supports a variety of custom shipping methods. You can use more than one method on the same store, and set up multiple shipping services for each method. You can even determine how they are sorted when displayed to the customer using the ordering feature described in the next section. The methods are:

- **Flat rate based on order amount**. Select this option if you wish to charge a flat rate based on the total order amount (e.g. for orders between $50 and $100, charge $7.50). The parameters that need to be set to configure a shipping method based on the total amount of the order are:

  - Shipping Option Name (required)
  - Delivery Time (optional)
  - Price Ranges (up to 10 tiers): "From" price, "To" price, and ship rate

- Order amount above which this shipping service would be free (optional)
- Handling Fee (optional) and whether it should be displayed as a separate "Shipping & Handling" charge or rather integrated into the shipping rate.
- Limitation of applicability. Choose whether this shipping option should be visible to all customers, only domestic customers, or only international customers.

- **Percentage of order amount**. Select this option if you wish to create a shipping option that charges a rate based on a percentage of the total order amount (e.g. for orders between $50 and $100, charge 11% of the order amount). The parameters are:
  - Shipping Option Name (required)
  - Delivery Time (optional)
  - Price Ranges (up to 10 tiers): "From" price, "To" price, and percentage value
  - Order amount above which this shipping service would be free (optional)
  - Handling Fee (optional) and whether it should be displayed as a separate "Shipping & Handling" charge or rather integrated into the shipping rate.
  - Limitation of applicability. Choose whether this shipping option should be visible to all customers, only domestic customers, or only international customers.

- **Flat rate based on order quantity**. Select this option if you wish to create a shipping option that charges a flat rate based on the total number of the items in the cart (e.g. for order between 10 and 20 units, charge $5). The parameters are:
  - Shipping Option Name (required)
  - Delivery Time (optional)
  - Quantity levels (up to 10 tiers): "From" units, "To" units, and ship rate
  - Order amount above which this shipping service would be free (optional)
  - Handling Fee (optional, same as above).
  - Limitation of applicability. Choose whether this shipping option should be visible to all customers, only domestic customers, or only international customers.

- **Flat rate based on order weight**. Select this option if you wish to create a shipping option that charges a flat rate based on the total weight of the items in the cart (e.g. for order between 5 and 10 pounds, charge $12). The parameters are:
  - Shipping Option Name (required)
  - Delivery Time (optional)
  - Weight range (up to 10 tiers): "From" weight, "To" weight, and ship rate
  - Order amount above which this shipping service would be free (optional)
  - Handling Fee (optional, same as above).
  - Limitation of applicability. Choose whether this shipping option should be visible to all customers, only domestic customers, or only international customers.

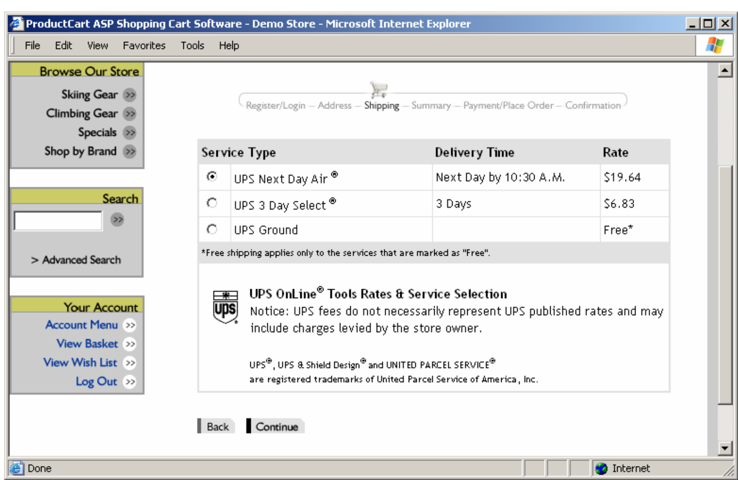
- **Incremental calculation based on order quantity**. An example is the best way to describe this shipping method: charge $5.00 for the first item, then an additional $1 on the next 9 items, then $0.50 on all items over 9. If the order contained 22 units, shipping would be calculated as follows: ($5 + ($1*9) + (.50*12)) = $20.00. The parameters are:
    - Shipping Option Name (required)
    - Delivery Time (optional)
    - Amount to be charged on first unit. Here you need to enter the amount to be charged on the first unit (e.g. $5.00 in the example mentioned above).
    - Quantity levels (up to 10 tiers): "From" units, "To" units, and ship rate
    - Order amount above which this shipping service would be free (optional)
    - Handling Fee (optional, same as above).
    - Limitation of applicability. Choose whether this shipping option should be visible to all customers, only domestic customers, or only international customers.

Ordering & Displaying Shipping Options

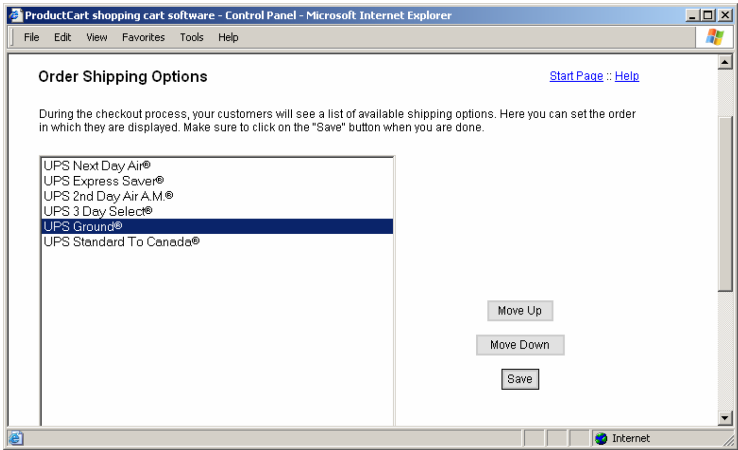
During the checkout process, your customers will see a list of available shipping options. Since you may have set up multiple shipping providers, and multiple shipping services for each provider, it is a good idea to organize them according to a specific sorting criteria.

For example, you may like the idea of organizing the available shipping options by delivery time (e.g. UPS Next Day Air®, FedEx Priority Overnight, UPS 2nd Day Air®, FedEx Express Saver, and so on), or you may want to organize them by provider instead (e.g. e.g. UPS Next Day Air®, UPS 2nd Day Air®, FedEx Priority Overnight, FedEx Express Saver, and so on).

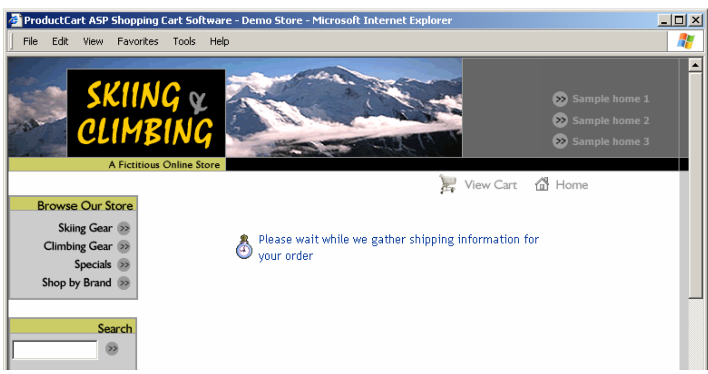
This second ordering method was used in the testing store shown below as an example.



To set the order in which available shipping options are shown to your customers during the ordering process, select *Order Options* from the *Shipping Options* menu. The shipping services that have been setup on your store will be displayed. Select any of them, then click on the *Move Up* or *Move Down* button to change its position in the list. When you are done, click on *Save*.



If you have set up a significant number of shipping options, it will take ProductCart several seconds to contact the various shipping providers, obtain and organize the rates, and calculate any other custom shipping option that you may have created. During this time, ProductCart will display a message similar to the one shown below.



<u>**Problem with Safari browser**</u>: This feature seems not to be working properly on Macintosh computers that use the latest Safari browser. The browser hangs and shipping options are never shown to the customer. We are investigating the best way to solve the problem. In the meantime, you can address this issue by eliminating the code that handles the display of the "Please wait..." message. Open the file pc/login.asp using Notepad or an HTML editor. Locate the following lines of code, and follow the removal instruction.

```
//Removed the following two lines below for proper operation for Mac Safari Browser
isChecked(orderform.separateShipping);
return (true);
```

Most shipping related messages, including the one mentioned above, are fed dynamically to these pages using an "include" file called *languages_ship.asp* that is located in the *includes* folder. To edit this file use an HTML editor or Notepad. Make sure to only edit the text contained between the double quotes. Always back up the existing file so that you may restore it in case the changes that you apply to the file cause any issues.

Previewing Shipping Options

If your store has one or more shipping options setup, customers will be able to obtain an estimate of the shipping charges for their order before registering an account with your store or logging into an existing account. A text link located at the bottom of the shopping cart page (*pc/viewCart.asp*) loads a pop-up window that allows the customer to enter a deliver address, and then provides a list of shipping options available for delivery to that address, along with the corresponding charges.

The text used for the link ("Estimated Shipping Charges") can be changed by editing the file ***includes/languages_ship.asp*** as mentioned on Appendix C.

If no shipping options have been setup on the store ProductCart will automatically hide the "Estimated Shipping Charges" link.

No Shipping Rates Returned

It might happen at times that no shipping rates are shown to a customer during checkout. There are many reasons why this may occur. It some cases, it could be a configuration problem on your side (e.g. you configured a certain shipping provider to only show a specific shipping option that is not available for delivery to the address that the customer entered). In other cases, a shipping provider's server may be unavailable to respond to the shopping cart's request for rates.

The message that is shown to the customer when no shipping rates are found can be edited by modifying a text string in the file *includes/languages_ship.asp*. See Appendix C for more information.

Here is a list of reasons that may trigger a "No shipping rates returned" scenario, and suggestion as to what you can do to fix the problem (they mainly apply to dynamic shipping rates):

1. The *Ship From* address has not been set up properly. Select *Shipping Options/Shipping Settings* to enter the address from which orders will be shipped. The ZIP code should be 5 digits only, do not add the extra 4 digits (US stores).
2. The shipping module requires a valid address from both the Store and from the Customer to be able to return valid shipping rates. Make sure the *Ship From* address has been configured properly (see above), and that the customer is entering a valid address.
3. For the dynamic shipping calculator to work properly your Web server (hosting your online store) must have the Microsoft's XML Parser 3.0 SP2 or greater installed. Confirm with your hosting company that your Web server has these settings. The ProductCart Setup Wizard detects whether or not the XML Parsers is installed, so you may also run that part of the Setup Wizard again.
4. The order may be exceeding a weight limit. Shipping options are not shown when the weight exceeds the following limits:
    a. UPS: 150 Lbs for shipments within the US and Canada (70kg elsewhere). The weight limit is 70 Lbs for oversized items. An item is oversized when the length+girth > 108 inches. More about shipping oversized packages with UPS.

b. FedEx: 130 Lbs.

5. The service(s) you have set up are not available for the delivery address entered by the customer. For example, make sure to select both FedEx Ground and FedEx Home Delivery, since the former is used for rates to commercial addresses, and the latter to obtain rates for residential deliveries.

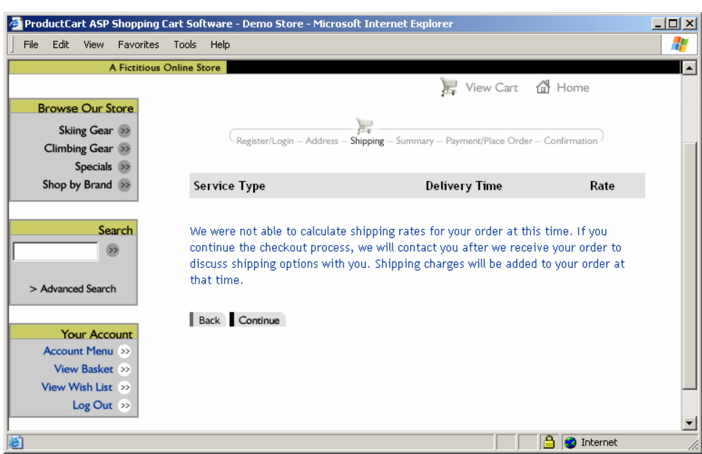
6. The pickup/delivery method that you have selected is not compatible with one or more of the selected services. For example, if you selected UPS Store/UPS Retail Location as the Pickup Type, you will need to change to UPS Customer Counter for UPS Ground Rates to be shown.

7. The packaging type that you have selected is not compatible with one or more of the selected services. For example, UPS Packs can only be used for Next Day and Second Day services, not for Ground.

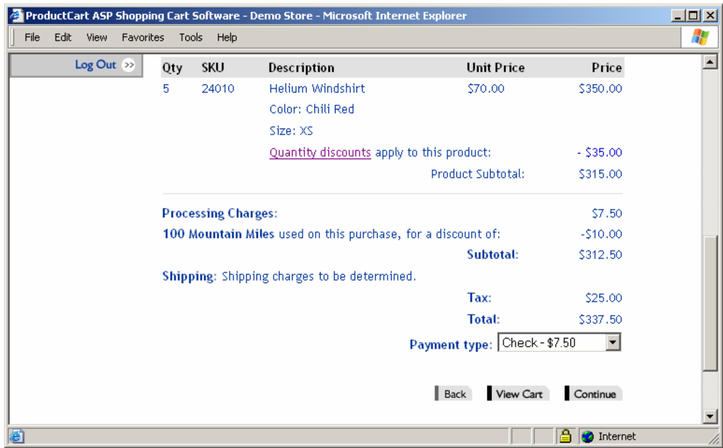
8. The Web server that returns rates to the shopping cart is not responding. For example, UPS or FedEx may be performing scheduled maintenance on their servers. If this is true, the downtime is normally very limited, and rates should start showing again soon.

9. The shopping cart content (total weight, total quantity, total order amount) does not fall into any of the brackets that you have created when you configured any of your custom shipping options. For example, if you are shipping based on quantity, the quantity level in the customer's order could exceed the quantity specified in your shipping option configuration. The same might be true for the order's weight, if you have setup options that are based on the weight, and for the order's total amount, if you have setup options that are based on that value.

Note: As a general rule of thumb, before you submit a support request indicating that you believe there is a malfunction in the way ProductCart is calculating shipping rates, please attempt to replicate the exact same shipment (same origination and delivery address, delivery address type, pickup/delivery method, packaging type, shipment weight, etc.) at the dynamic shipping provider's Web site. Then, compare the service selections and rates that are returned with the ones that are returned by ProductCart.



Even if for any of the reasons mentioned above (or any other reason) no shipping rates are returned to the customer, ProductCart still allows the order to be completed. The customer is informed that shipping options will be added to the order after it has been received.



The order details page, in the *Shipping* line, includes a similar message, which can also easily be edited. Once the order has been placed, the store administrator can use the *Edit Order* feature to add shipping charges and handling fees to the order. Please refer to that section of this document for more information about how to edit orders in the Control Panel.

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Chapter

7

Payment Options

The *Payment Options* module allows you to define how customers will be able to pay for an order. You can offer one or more payment options. ProductCart allows you to define a variety of real time and non-real time payment methods. In addition, you can restrict certain payment methods to wholesale customers only.

Make sure you add at least one payment option to your store before you start testing the checkout process, or you will not be able to checkout (ProductCart will show an error message indicating that at least one payment option must be configured).

An Overview of Payment Processing Scenarios

There are three types of possible payment processing scenarios in ProductCart, which correspond to the following payment methods:

- **Real time** payment methods, configured to **capture** funds. This is how real time payment gateways are typically setup by default. When a payment gateway is configured this way, a credit card transaction is at the same time authorized (i.e. the payment gateway checks to see if the funds necessary for the order are available on that credit card account, and reserves them for the transaction), and captured (i.e. the payment gateway actually debits the account). As explained in more details later in this chapter, ProductCart considers these orders "processed", as payment has already been collected when the order is finalized. All payment gateways can authorize and capture funds.
- **Real time** payment methods, configured to only **authorize** funds. Some, but not all payment gateways support this feature. Each payment gateway supported by ProductCart is described in details later in this chapter. When a payment gateway is configured to only authorize, rather than capture funds, the customer's account is not debited (although the funds are reserved for a certain amount of time and may not be accessible for other purchases during that time). In this scenario, payment has not yet been collected for the order, and therefore ProductCart considers it "pending".
- **Non-real time** payment methods. Funds are neither authorized, nor captured during the checkout process. (e.g. check, purchase order, COD, etc.). Any non-real time payment option leads to transactions that are processed at a later time. All orders placed using a non-real time payment option are considered "pending" by ProductCart.

With ProductCart you can accept **credit cards** on your store by setting up either a real-time or a non real-time payment option. The following is a brief overview about real-time credit card processing on the Internet.

About Real-Time Credit Card Processing

When credit cards are processed in real-time on the Internet, credit card information provided by the customer during the check-out process is typically passed to a service called a "payment gateway". Payment gateways connect the online store with a credit card processor, on one side, and with your bank on the other side.

ProductCart order form ↔ **Payment gateway** → **Your bank**
↕
Credit card processor

There are a number of payment gateways that offer a different array of services. One of the most important things to look for in a payment gateway is whether or not the payment gateway allows you access to a secured area where you can manually void and refund previously processed credit card transactions. This will help you in handling fraudulent orders, as well as returns or cancellations. Another feature to look for is whether a payment gateway allows you to authorize, but not capture funds. As explained later in this chapter, this feature can be extremely useful when combined with the order editing and batch processing features that are part of ProductCart.

To process credit cards in real time you will need:

- A business bank account
- A credit card merchant account. Your bank or the gateway that you sign up with will help you get a merchant account. Note that credit card companies often handle online and offline credit card processing accounts separately. So even if you already have a merchant account that, for instance, is being used to process credit cards at your retail location, you will have to apply for an additional merchant account (for your Internet store).
- An account with a payment gateway. Some credit card processors also act as a payment gateway, in which case you would not be required to take this further step.

Usually, your Merchant Account Provider will already have a relationship with a payment gateway. ProductCart supports the following payment gateways:

- 2CheckOut - http://www.2checkout.com/
- Authorize.Net - http://www.authorize.net
- Bank Of America eStore Solutions - http://www.bankofamerica.com/merchantservices
- ChecksByNet by CrossCheck – http://www.checksbynet.com
- Concord EFSnet - http://www.concordefsnet.com/
- CyberSource – http://www.cybersource.com
- ECHO (Electronic Clearing House) - http://www.echo-inc.com
- Fast Charge – http://www.fastcharge.com
- Fast Transact – http://www.fasttransact.com
- Internet Secure – http://www.internetsecure.com
- ITransact - http://www.itransact.com/
- LinkPoint Connect - http://www.linkpoint.com/product_solutions/internet/inet_index.html

- Moneris' eSelect Plus - https://www3.moneris.com/
- Paymentech – http://www.paymentech.com
- PayPal – http://www.paypal.com
- Protx – http://www.protx.com
- PSIGate - http://www.psigate.com/
- Trine Commerce Systems - http://www.trinecs.com
- USAePay – http://www.usaepay.com
- VeriSign Payflow Link - http://www.verisign.com/products/payment.html
- VeriSign Payflow Pro - http://www.verisign.com/products/payment.html
- ViaKLIX - http://www.viaklix.com/
- WorldPay - http://www.worldpay.com
- YourPay – http://www.yourpay.com

Additional payment gateways can be added to ProductCart for a fee. Contact Early Impact or your ProductCart reseller for more information.

> **Note**: Typically, payment gateways provide merchants with an administration tool to setup the account, view past transactions, process refunds, add new charges to a credit card account, etc. Inquire with your payment gateway about such a service. You will not be able to perform tasks such as processing a refund through ProductCart's Control Panel. You will have to perform those tasks by using the payment gateway's administration tool. For example, funds are not automatically refunded when an order is returned or cancelled.

> **Note**: When a payment gateway is involved in a credit card transaction, and the payment gateway has been set up to capture funds in real time, ProductCart does not keep credit card information for that transaction in your store's database. In this scenario, only the payment gateway stores credit card information. However, if you are using Authorize.Net or Payflow Pro and have set either of these payment gateways to authorize, but not capture funds, credit card information is encrypted and stored in the store database. This allows the system to later capture funds by using the batch processing feature.

About PayPal Payments

ProductCart allows you to use another type of real-time payment -- through the PayPal network. ProductCart uses PayPal's latest technology, called PayPal Instant Payment Notification (IPN). You can set up PayPal as the only payment method, or in conjunction with other payment methods to provide your customers with multiple payment options.

The advantage of using PayPal, as the store owner, is that you can process payments instantly, but without having to sign up for a merchant and a gateway account as described above. In fact, with PayPal you don't even need a business bank account, as PayPal accounts can be linked to personal bank accounts. As a store visitor, the advantage of using PayPal is also that you don't need to have or use a credit card to place an order, although you can use a credit card to pay for the order.

In a nutshell, PayPal allows people to securely exchange payments online via e-mail.

The company works as a clearing house between sender (your store customers) and receiver (you). Both sender and receiver open an account with PayPal. At any time they can deposit and withdraw money from that account by linking it to their bank account or to a credit card.

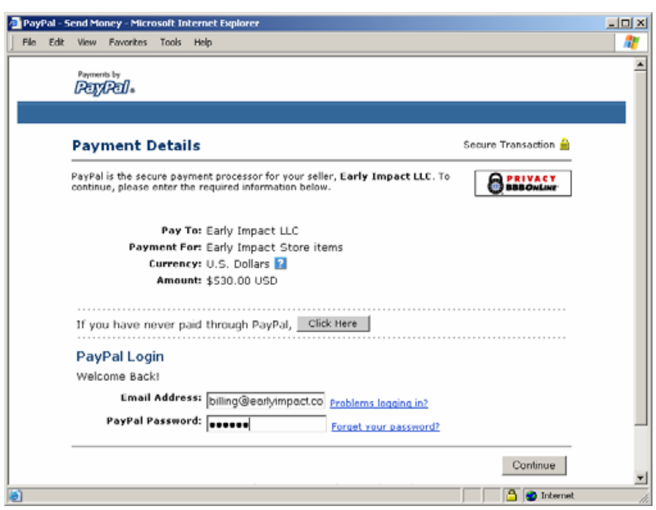
The sender can submit a payment to the receiver by logging into the PayPal network and simply specifying the receiver's e-mail address. In the case of your store's transactions, customers that select PayPal as the payment option will be automatically prompted to log into the PayPal network, and send money to your e-mail account (i.e. your PayPal account).

Typically, with PayPal the receiver (you) has to accept the payment before a transaction is completed and money is transferred from the sender's PayPal account to the receiver's account. ProductCart, however, uses PayPal's new Instant Payment Notification system, which allows a merchant (you) to have PayPal instantly process the transaction. If the transaction goes through, an authorization code is returned to the shopping cart, and the order will show up in the ProductCart Control Panel as "processed", not as "pending".

As far as what steps your store customers will have to go through when selecting PayPal as the payment options, consider the following three scenarios:

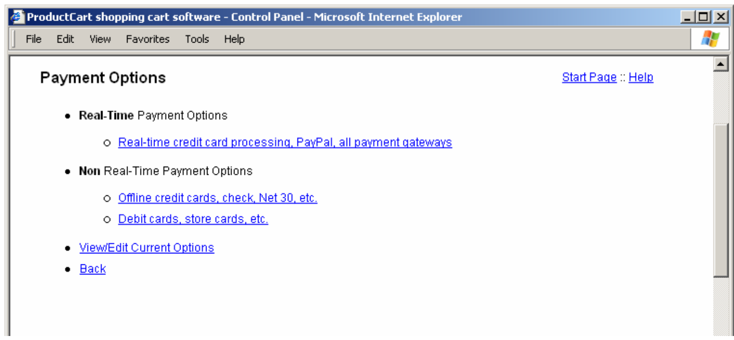
- The user does not have a PayPal account, and therefore needs to set up one. In this scenario, personal information that the user has already provided on your store's checkout page will be passed to PayPal so that the user does not have to enter it again to setup a PayPal account. This is also the case if the user does have a PayPal account, but there is no cookie on his/her system stating so (because it was deleted or because the user's browser does not accept cookies).
- The user already has PayPal account (and a cookie on his system indicating so). In this scenario PayPal will prompt the user to log into their existing account by pre-filling the e-mail field with the address registered on that account (see image below). At that time, the user can enter his password and log in, or opt to create a new account.

To become more familiar with PayPal or to set up a Personal or Business Account, visit the company's Web site at http://www.paypal.com



Adding a Payment Option

To add a payment option, select *Add New Option* from the *Payment Option* menu. The following screen will be displayed.



As mentioned earlier in this chapter, payment options can be divided into two categories:

- **Real-time**. Click on *Real time credit card processing…* to add a new real-time payment method. This is where you can set up payment options such as online credit card processing and PayPal.
- **Non real-time** (or offline). Offline credit card processing, as well as custom payment options such as payment terms (Net 30, Net 60, etc.), check, cash on demand, etc., all fall in this category. ProductCart also features support for Debit Cards, Store Cards, and other custom payment options where the user is required to input multiple pieces of information. In all cases, there is no real-time authorization or capture of the funds, which will instead be collected offline, after an order has been placed.

Note: To process credit cards offline you will still need a business bank account and a credit card merchant account, but you will not need to use a gateway since transactions are processed manually, offline. This may be a good option, for example, if you do not expect many online orders per day, and you already have a retail store with a POS credit card terminal.

Configuring a Real-Time Payment Option

To add a new **real-time** payment option, select *Add New Option* from the *Payment Option* menu, and then click on *Real time credit card processing…*. The window that will be displayed will list real-time payment methods that have already been configured, and will allow you to add a new one.

To configure a real-time payment option, you will need the gateway (or PayPal) account number, plus other information specific to each gateway. Once you provide the information requested by ProductCart, your shopping cart will be automatically integrated with the selected gateway.

To configure ProductCart to handle **real-time credit card processing**, select one of the supported payment gateways by checking the check box next to it. Then, enter the information requested by the gateway as described in the paragraphs below. When you are done, click on the *Add* button to enable the new real-time payment option.

Note about the **CVV code**. Some payment gateways allow you to require that customers enter their cards' CVV code on the payment details page. CVV stands for Card Verification Value, sometimes also referred to as CVC (Card Verification Code). The CVV code is an additional 3- or 4-digit security number that is printed (not embossed) on a credit card. On MasterCard, VISA and Diners Club cards, the CVV code is the last group of 3 or 4 digits to be found printed on the signature strip on the reverse side of the card. On American Express cards, the CVV code is represented by the 4 small digits printed on the front of the card, on the right side of the account number. The CVV code can only be found on the card itself and nowhere else, not even on associated credit card statements. This means that the person requesting the transaction must have (or have had) the card in their hands.

2Checkout

Similarly to what happens with PayPal and WorldPay, when you select 2Checkout as your payment gateway, customers will temporarily leave your online store to submit their payment information. They will be taken back to your Web site once the transaction has been approved.

When customers click on the *Continue* button after verifying the correctness of the order on your store, they will be asked to confirm their billing information, then will temporarily leave your Web site and will be taken to a secure payment form located on the 2Checkout.com Web site (see image below). The billing address is passed to the payment gateway by ProductCart, so the customer won't have to re-enter it.

Customers have the option to submit the order in a currency other than the one used by the store. To do so, they may click on any of the flags shown in the middle portion of the page. When they mouse over a flag, the currency name and current exchange rate will be shown. When they click on a flag, the page refreshes and the order total is converted into the selected currency.

Once the transaction is processed, customers will be redirected back to your store. You may want to include on your order confirmation email some information about the fact that your online store's name will not appear on the customer's credit card statement, but rather the charge for the order will be under the name 2CO.COM.

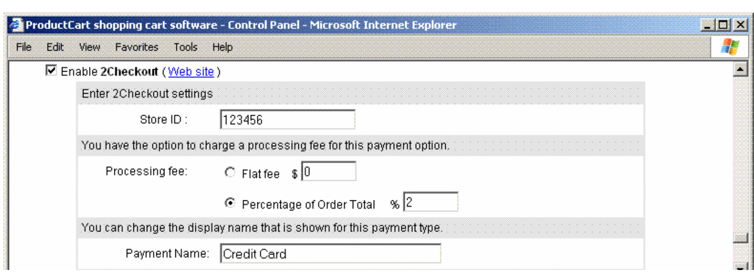
To activate 2Checkout as your payment gateway, first log into the 2Checkout administration area and set the following system properties:

- Under "Helpful Links", look for "Look & Feel", and click on "Settings".
- You will be taken to the "Look and Feel" page.
- On the 3rd input field that says "Input a url for your customers to be sent to on a successful purchase", insert the URL:

  http://www.yourStore.com/productcart/pc/gwReturn.asp
- Click on the "Save Changes" button at the bottom of the page.

Now, log into the Control Panel, and enter the following information in the corresponding fields on the *Add New Real Time Payment Option* page.

- Store ID. Enter the Store ID that you received when you set up an account with the company.
- Processing Fee. You can choose whether to charge an additional transaction fee using the *Processing Fee* field. The transaction fee can either be a set amount or a percentage of the total order amount (e.g. 2.3% of the total).
- Payment Name. You can change the description that is shown to your customers during checkout. For example, you could change "Credit Card" to "Visa and MasterCard". Finally submit the form by clicking the *Add* button



Authorize.Net

ProductCart v2.6 and above meet all requirements for the **Authorize.Net Shopping Cart Certification**, demonstrating that the shopping cart complies with the high performance and security standards of the Authorize.Net Payment Gateway. The certification process was completed in April of 2004. In addition, ProductCart was recertified by Authorize.Net in March of 2005.

To integrate ProductCart with Authorize.Net, you will first need to choose one of following two integration methods:

- **SIM** (Simple Integration Method). Transactions are not handled on your website, but rather forwarded to a secure payment form. With ProductCart, this is invisible to the user (i.e. the user never leaves your Web site). This method is the replacement for what used to be called "Weblink".
- **AIM** (Advanced Integration Method). Transactions are handled on your Web site. Information is passed directly to Authorize.net, without having to go through an additional form. The user never leaves your Web site. However, you are required to have an SSL certificate installed on the server (dedicated or shared), and you have to turn the SSL feature on in the *Store Settings* area of the Control Panel before you can use AIM.

In other words, if you do not have an SSL certificate installed on the server, then you will have to use SIM. In all other cases, you should use AIM.

In both cases you only need two pieces of information to configure Authorize.Net in ProductCart: your Login ID and a Transaction Key.

The Login ID is your Authorize.Net account number. This is separate from your Merchant Account number, but it is frequently purchased at the same time from the bank or merchant service provider that creates your Merchant Account. Your bank or merchant service provider normally does the following:

- Assigns you a Merchant Account Number.
- Sets up your Authorize.Net account. At this time, you will be assigned a Login ID and Password that you will use to log into the administration area of the Authorize.Net Web site. This is where you can edit settings for your account, view previous credit card transactions, issue refunds, and process credit card charges using a virtual terminal.
- Acts as your main point of contact for basic issues regarding your Merchant and Authorize.Net accounts.
- Enables you to add certain types of credit cards to your Merchant account, and, if the merchant service provider is also your Authorize.Net Reseller, activates processing capability for those cards on your Authorize.Net account.
- Deposits credit card funds to your account.

To setup your Authorize.net account to work with ProductCart, do the following:

- Log into your Authorize.Net account at https://merchant.authorize.net/
- Select "Settings & Profile" from the Main Menu
- ProductCart uses version 3.1 of Authorize.Net's payment gateway. To ensure that the "**Transaction Version**" is set to 3.1, select "Transaction Version" in the "Transaction Response" section. Change the Transaction Version by using the drop-down box. Click "Submit" to save the change.
- If you are using SIM, click on "**Relay Response**" in the Transaction Response section. Enter the following URL, where www.yoursite.com is the path to the *productcart* folder on your Web store. This is the page that the gateway will send information to when a transaction has been processed:

  http://www.yoursite.com/productcart/pc/pc_authreturn.asp

  The gateway will reject the transaction if the URL that the gateway sends a response to is not the one listed in this field.

  You do not need to enter any Relay or Response URLs in the Authorize.Net administration area if you are using AIM.
- If you want your customers to have to submit their card's security code (CVV) to place an order, make sure to configure Authorize.Net to require that field by checking the "Does NOT Match (N)" setting under "Settings > Security > **Card Code Validation**".

Regardless of the connection method that you are using (SIM or AIM), you will need to obtain a **Transaction Key** to finish setting up the payment gateway within ProductCart.. To obtain your Transaction Key, follow these steps:

- Log into your Authorize.Net account at https://merchant.authorize.net/
- Select "Settings" from the Main Menu
- Click on the "Obtain Transaction Key" link in the Security section
- Type in the answer to your secret question. The secret question and corresponding answer is setup during account activation. It is required to authenticate the merchant before the Transaction Key is generated.
- Click "Submit" to receive your Transaction Key.

You can now go back to the ProductCart Control panel and configure the settings as described below:

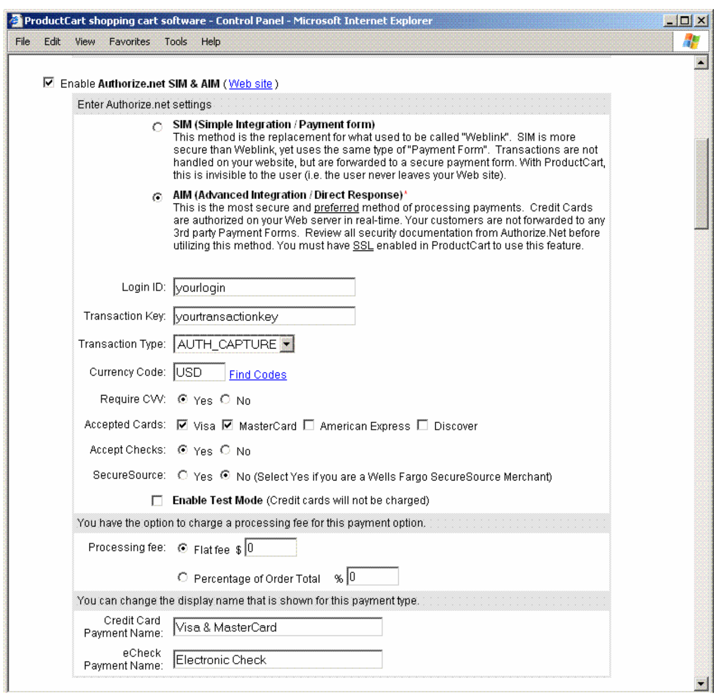
- Login ID: as mentioned above, this is your Authorize.Net account number.
- Transaction Key. Enter your Transaction Key, which can be obtained as described above. If you are updating to ProductCart v2.7 from a version prior to v2.6, you MUST replace your Authorize.Net password with your Transaction Key.
- Transaction Type. Select a transaction type from the drop-down menu. As mentioned earlier in this chapter, you can use Authoirze.Net to either authorize or authorize & capture funds during a transaction. If you select AUTH_CAPTURE, the credit card is authorized and debited (this does not apply to electronic checks, where the order amount

is always captured). If you select AUTH_ONLY, the credit card is authorized, but not debited. In the second scenario, the transaction is not settled (and therefore funds are not deposited into your back account), until you either manually capture funds using the Authorize.Net administration console, or automatically capture funds using ProductCart's batch processing feature.

Note that when Authorize.Net is set to AUTH_ONLY, credit card information is encrypted and stored in the store database. When it's set to capture funds (AUTH_CAPTURE), credit card information is not stored in the store database. Storing credit card information is required to successfully process the order(s) using the batch processing feature. When orders are batch processed, two scenarios can occur. If the order amount has not changed, funds are immediately captured. If the order amount has changed, then Authorize.Net resubmits the transaction to the payment processor, receives a new authorization for the order amount, and then captures those funds. See *Combining Order Editing and Batch Processing* for more information.

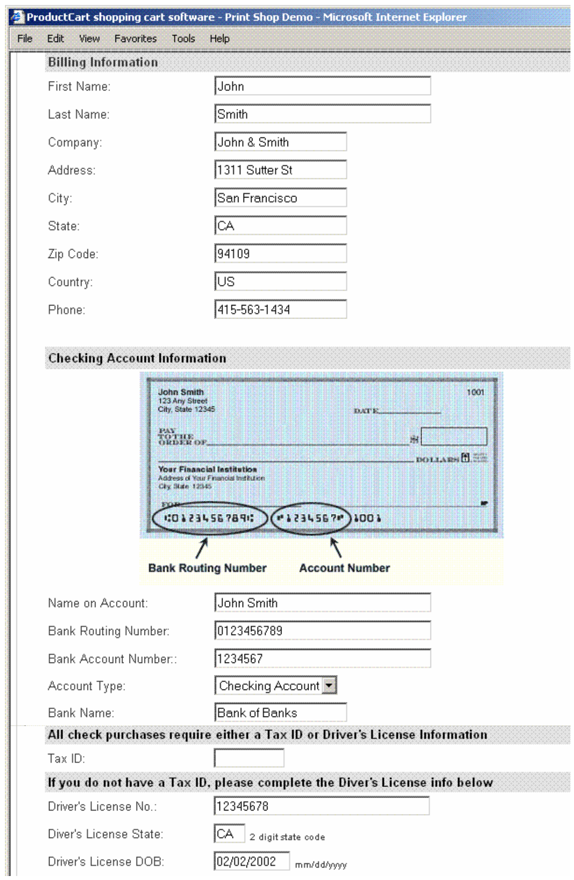
When an order is received, ProductCart considers the order *processed* when funds have been captured, *pending* when it funds have been authorized, but not captured (payment has not been collected yet). Refer to the *Managing Orders* section of this User Guide for more information.

Note that if you are using electronic checks, the order amount is captured regardless of how you have configured the Transaction Type: i.e. the customer's bank account is debited even if the Transaction Type is set to AUTH_ONLY.



- Currency Code. Enter the currency code for the currency used on your store. To locate the correct currency code, click on the corresponding text link. A list of all currency codes accepted by Authorize.Net will be displayed. The default currency code is USD.

- Require CVV. When you check this option, the security code field is shown on the credit card page. Otherwise, it remains hidden. Make sure you have setup the gateway to validate that field by checking the "Does NOT Match (N)" setting under "Settings > Security > Card Code Validation". For more information about the CVV code, see a previous section in this chapter.
- Accepted Cards. The select the credit card types you accept on your store.



- Accept Checks. ProductCart v2.6 and above support electronic checks via Authorize.Net (eCheck.Net). Electronic checks allow customers to pay for products or services with a "virtual" check by entering the requested bank account information during the checkout process (see screen shot above). At settlement time, the Authorize.Net system initiates a debit to the consumer's checking account via the Automated Clearing House (ACH) and then transfers collected funds to the merchant's account. The eCheck.Net system notifies merchants of failed debit attempts, including "Not Sufficient Funds" returns. Benefits of the eCheck.Net service (from the Authorize.Net Web site):
  - Acceptance of electronic check transactions can reduce payment processing costs to merchants.
  - Merchants can easily expand the payment options available to their customers at the point of sale which could potentially increase overall sales.
  - All eCheck.Net transactions are automatically settled each day.

In order to accept electronic checks on your store, you will have to separately apply for an account with Authorize.Net. Additional fees apply. Contact Authorize.Net for more information. Keep in mind that eChecks work differently than a credit card transaction especially with respect to charge back rights and procedures. For more information and for apply for eCheck, Authorize.Net has a separate application, which can be downloaded using the following links: http://www.authorizenet.com/files/echecknetstandardterms.pdf

All eCheck orders are automatically considered *Processed* by ProductCart, as the order amount is always debited to the customer's bank account. This is true regardless of which Transaction Type setting you choose for your store. If for any reasons you would like eCheck orders to be considered *Pending*, use this option. You will then need to process these orders from the *Process Order* page. Note that *Pending* eCheck orders will not be listed in on the Batch Processing page.

- SecureSource. Select *Yes* only if you are a Wells Fargo SecureSource Merchant. All other Authorize.Net customers should leave the setting set to *No*.
- Enable Test Mode (Credit cards will not be charged): When this option is checked, transactions are submitted as test transactions. This is true even if Authorize.Net is set to be in Live Mode in the Authorize.Net administration area. All transactions appear to be processed as real transactions, with the exception that a payment processor is never contacted, and so all transactions are approved. This allows you to run tests on your store without having to log into the Authorize.Net administration area and change the gateway's status from Live to Test Mode, and vice versa.
- Processing Fee. You can choose whether to charge an additional transaction fee using the *Processing Fee* field,. The transaction fee can either be a set amount or a percentage of the total order amount (e.g. 2.3% of the total).
- Payment Name. You can change the description for both the credit card and electronic check payment options. This refers to the description that is shown to your customers during checkout. For example, you could change "Credit Card" to "Visa and MasterCard". Finally, submit the form by clicking the *Add* button

Bank of America eStore Solutions

To activate Bank of America eStore Solutions, first set up an account the following URL: http://www.bankofamerica.com/merchantservices/. Once you have been assigned a Store ID, follow the instructions below to configure your account to work with ProductCart.

Log into your eStore Manager.

- Click on "Manage Store" located on the Navigation menu on the left hand side of your screen. Click on "Configure Options" from the sub-menu. Set up the following options:
    - The "Web Site Address" or "Store Home" is the address to your store. Enter the following (where www.yourstore.com should be replaced with store's address): www.yourstore.com/productcart/pc/default.asp
    - When you are setting up your store and running tests, you will want to set the "System Status Flags" to run in "Test/Verbose" mode. Note that when a store is running in "Test/Verbose" mode, the BofA eStore system always returns a lengthy HTML page that contains a large amount of technical details about the

transaction (that's why they call it *Verbose* mode). To complete the transaction and go back to ProductCart, there is a link at the very bottom of the page. You will have to use that link to complete the process or the test order will not be shown in the Manage Orders area of the ProductCart Control Panel.

- "Customer Service Email" is usually the store administrator's email address
- For the option "When a Shopper Places an Order:", select the first radio button that states to redirect to merchant's approval/decline pages. Set those pages to the following:
    - APPROVALS: http://www.yourstore.com/productcart/pc/gwReturn.asp
    - REJECTIONS: http://www.yourstore.com/productcart/pc/sorry_bofa.asp
- Note that the first URL (Store Home) does not want the "HTTP://" in front, but the following two (Approval and Rejection links) do need it.
- "Under Concurrent Shopper Configuration" select the radio button that states "Handle multiple concurrent authorization requests per shopper cookie".
- Click on "Update" at the bottom of the page.

- Next select "Anti-Fraud Manager" from the sub-menu on the left. Set all the listed amounts according to your preferences and then click on "Update".
- Next select "Order Alert Email" from the sub-menu on the left. Enter an e-mail address and then click on "Update".
- Repeat the same for "Order Number Manager".
- Select "Security Settings" and select "Minimum Enforcement" for the Security Mode. Then towards the bottom of the page, insert your website address. Click on "Update".

To complete the configuration you MUST click on the "Publish Changes" at the top of the screen. You will then be prompted to "Activate" your changes. Click on the "Activate" button and you should receive a "Success" message.

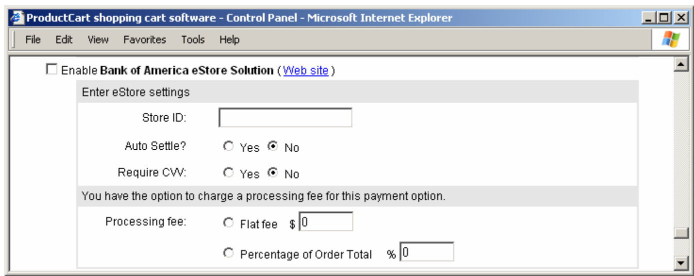
You are now ready to go back to ProductCart and complete the payment gateway configuration by filling out the following fields on the *Add Real-Time Payment Option* form:

- Store ID. Enter your Store ID.
- Auto Settle. If this option is checked, the credit card transaction is authorized and debited. Otherwise, the transaction is authorize, but will need to be manually settled later, after confirming the order, by logging into your Bank of America eStore Solutions account.

  Bank of America recommends that the auto settle flag should only be used for merchants who are doing digital delivery or offering a service

  When an order is received, ProductCart considers the order *processed* when funds have been captured, *pending* when it funds have been authorized, but not captured (payment has not been collected yet). Refer to the *Managing Orders* section of this User Guide for more information.

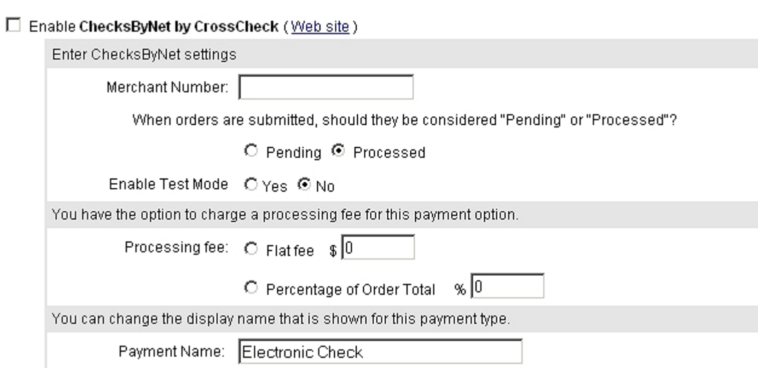
- Require CVV. For added security, you can require customers to enter their card's CVV on the payment details form. For more information about the CVV code, see a previous section in this chapter.
- Processing Fee. You can choose whether to charge an additional transaction fee using the *Processing Fee* field. The fee can be either a flat charge or a percentage of the total order amount.
- Payment Name. You can change the description that is shown to your customers during checkout. For example, you could change "Credit Card" to "Visa and MasterCard". To complete the activation, submit the form by clicking the *Add* button.



Note about batch processing transactions. ProductCart's batch processing module currently does not support the automatic settlement of transactions authorized via Bank of America eStore Solutions. However, we expect to add this payment gateway to the batch processing feature later this year. Please contact us for more information. At the moment, you will have to manually settle transactions authorized via Bank of America eStore Solutions by logging into your account.

ChecksByNet by CrossCheck

Enabling your ChecksByNet - CrossCheck account in ProductCart is very simple. Select: *Payment Options > Add New Options > Real-time credit card processing…* to load the *Add Real-Time Payment Option* form. Select *ChecksByNet* from the list of available payment gateways, and you will be taken to a section of the page where you can configure the following settings:



- Merchant Number: Enter the Merchant Number that was provided to you when you set up your account.

- Transaction Type: The order amount is always debited to the customer's bank account. This is true regardless of which Transaction Type setting you choose for your store. If for any reasons you would like electronic checks orders submitted through ChecksByNet to be considered *Pending*, set this option to "Pending". In most cases, you will want to set this option to "Processed" since payment has already been collected by the time you receive the order.

- Enable Test Mode. Check this option to place test orders. When you do so, the order amount shown on the payment page will default to $2 and the payment form will be partially pre-filled with default settings provided by ChecksByNet (e.g. the bank routing number will be pre-filled with a certain value that should always be used for test transactions).

- Processing Fee. You can choose whether to charge an additional transaction fee using the Processing Fee field. The fee can be either a flat charge or a percentage of the total order amount.

- Payment Name. You can change the description that is shown to your customers during checkout. For example, you could change "Electronic Check" to "ChecksByNet Payment".

To complete the activation, make sure to check the box to the left of "Enable ChecksByNet by CrossCheck", and then submit the form by clicking the "Add Selected Options" button at the bottom of the page.

Concord EFSnet

On the Enabling your Concord EFSnet account in ProductCart is very simple. There is nothing that needs to be configured inside the administration area of your Concord EFSnet account. All you have to do is enter your account information on the *Add Real-Time Payment Option* form and configure the additional settings listed below.

Select *Payment Options > Add New Options > Real-time credit card processing…* to load the *Add Real-Time Payment Option* form. Select *Concord EFSnet* from the list of available payment gateways, and you will be taken to a section of the page where you can configure the following settings:

- Store ID: Enter the *Store ID* that was provided to you when you set up your account.

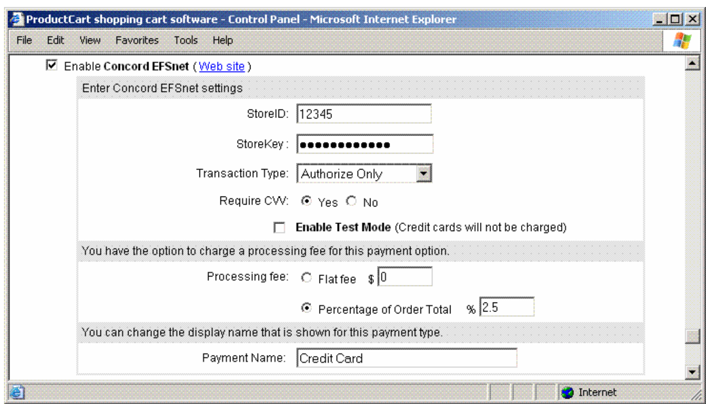
- StoreKey: Enter the *StoreKey* that was provided to you when you set up your account.

- Transaction Type can be set as either "Authorize Only" or "Authorize and Settle". Choose "Authorize and Settle" to both authorize and capture funds (the credit card is debited). Choose "Authorize Only" to authorize the credit card, but not capture the funds.

  When an order is received, ProductCart considers the order *processed* when funds have been captured, *pending* when it funds have been authorized, but not captured (payment has not been collected yet). Refer to the *Managing Orders* section of this User Guide for more information.

- Enable Test Mode. Check this option and use the test Merchant ID mentioned above to use the gateway in test mode. Credit cards are not charged. When *Test Mode* is enabled, data is sent to a different server. Specifically, ProductCart users the following URLs:
    - Live server: https://efsnet.concordebiz.com/EFSnet.dll
    - Test server: https://testefsnet.concordebiz.com/EFSnet.dll
- Require CVV. For added security, you can require customers to enter their card's CVV on the payment details form. For more information about the CVV code, see a previous section in this chapter.
- Processing Fee. You can choose whether to charge an additional transaction fee using the *Processing Fee* field. The fee can be either a flat charge or a percentage of the total order amount.
- Payment Name. You can change the description that is shown to your customers during checkout. For example, you could change "Credit Card" to "Visa and MasterCard".

To complete the activation, submit the form by clicking the *Add* button.



CyberSource

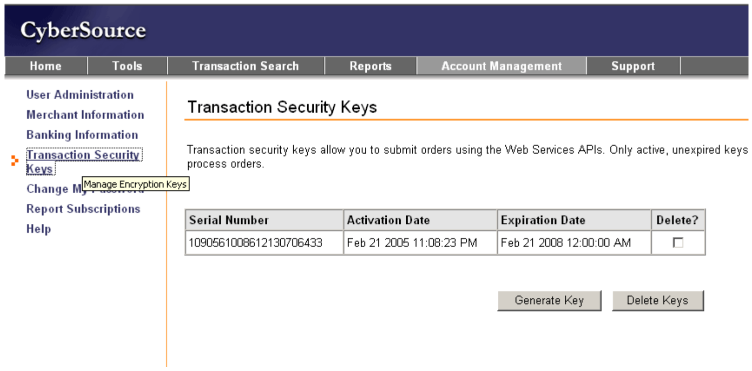
To use CyberSource with your ProductCart-powered store, you will need to ensure that the Web server that is hosting your store has the necessary software installed. Information on the software that needs to be installed on the server and on the system requirements to run it can be found at the following URL:

http://apps.cybersource.com/cgi-bin/pages/dev_kits.cgi?kit=ASP/All_Platforms

If you are hosting your store with a third-party, contact your Web hosting company and ask them if they support CyberSource, or if they can install the corresponding software on their server. Provide them with the link mentioned above so that they may download the software and documentation.

Once you have ensured that your Web server can support CyberSource, follow these steps to use CyberSource with your ProductCart store.

First, you will need to obtain a special file containing "security keys" from CyberSource. To do so log into the CyberSource Business Center. Select the menu item "Account Management" and then “Transaction Security Keys” from the left navigation menu (see image below). You will then need to click on the “Generate Key” button.



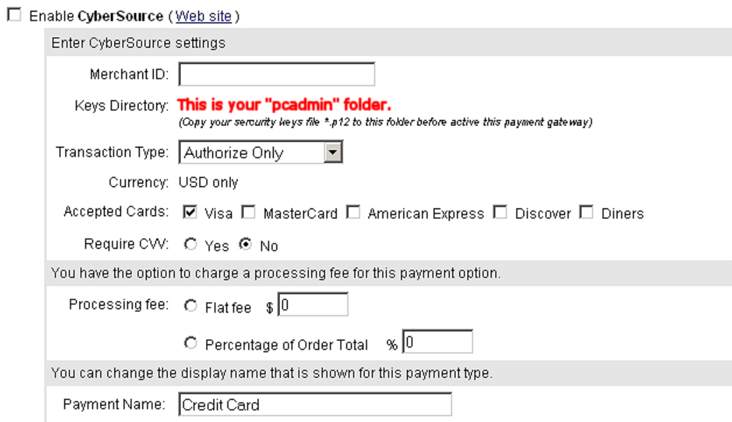
You will be taken to the next screen which uses a Java Applet to generate the key and send it to your local system. You will see a prompt asking if you trust the signed applet, click “yes” to this. Note, it might take several minutes before the Applet loads.

Once loaded, click on the “Gererate Certificate Request” button. Again, this task might take a little bit of time to complete. Once completed, it will prompt you to save the file to your local system. Save the file to your desktop, and then upload it to the *pcamin* folder in your ProductCart installation. Note that you likely renamed this folder when you installed ProductCart, based on the security recommendations mentioned elsewhere in this User Guide.

The security keys file carries a *.p12 extension. Make sure not to alter the file extension. The CyberSource software installed on your Web server will look for that file extension to automatically locate the security keys file once it has been uploaded to your Web server, in the directory mentioned above.

You can now return to the ProductCart Control Panel and finish configuring your CyberSource settings. Follow the instructions below to do so.

Select: *Payment Options > Add New Options > Real-time credit card processing…* to load the *Add Real-Time Payment Option* form. Select *CyberSource* from the list of available payment gateways, and you will be taken to a section of the page where you can configure the following settings:



- Merchant ID: Enter your Merchant ID that was provided to you when you set up your account.
- Keys Directory: You MUST copy your Security Keys file (*.p12) to the folder listed here. For information on how to obtain a Security Keys file, please see earlier in this section.
- Transaction Type. Can be set as either "Sale" or "Authorize Only". Choose "Sale" to both authorize and capture funds (the credit card is debited). Choose "Authorize Only" to authorize the credit card, but not capture the funds. When an order is received, ProductCart considers the order processed when funds have been captured, pending when funds have been authorized, but not captured (payment has not been collected yet).
- Currency: USD only.
- Accepted Credit Cards. Specify the credit card types that are accepted on your store.
- Require CVV: For added security, you can require customers to enter their card's security code (CVV) on the payment details form. For more information about the CVV code, see a previous section in this chapter.
- Test Mode. Unlike with other payment gateways, you will not see an *Enable Test Mode* feature when activating CyberSource. This is because your account is automatically set to "test mode" until you specifically ask CyberSource to switch to "live mode". According to CyberSource's documentation: "[…] when you are ready to enable your cybersource_id on the CyberSource production systems, please submit a request through our Knowledge Base at http://cybersource.custhelp.com/. CyberSource will send you a confirmation once your cybersource_id is ready for processing production transactions."
- Processing Fee. You can choose whether to charge an additional transaction fee using the Processing Fee field. The fee can be either a flat charge or a percentage of the total order amount.

- Payment Name. You can change the description that is shown to your customers during checkout. For example, you could change "Credit Card" to "Visa/MasterCard".

Technical note: To help your Web hosting company installed the necessary software on the Web server that is hosting your store so that you may be able to use CyberSource, provide them with the following information:

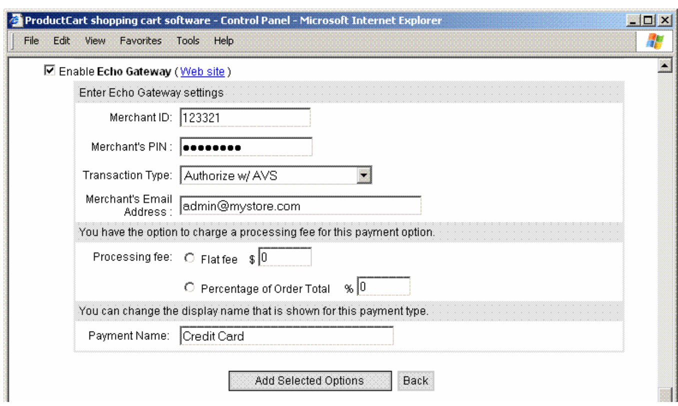
- ProductCart uses the CyberSource Simple Order API 2.0.0 for ASP.
- The name of the DLL's that need to be installed on the Web server is CybsWSSecurity.dll and CyberSourceWS.dll.
- They can be downloaded together with related documentation from the following URL:

  http://apps.cybersource.com/cgi-bin/pages/dev_kits.cgi?kit=ASP/All_Platforms

ECHO

Once you have created an account with Echo (http://www.echo-inc.com), log into the Control panel and fill out the following fields on the *Add New Real Time Payment Option* page.

- Merchant ID. Enter the Merchant ID that has been assigned to you by ECHO.
- Merchant PIN. Enter your PIN.



- Transaction Type. Select either to only authorize the transaction or to also capture funds, with or without address verification (AVS). Choose "Authorization & Deposit" to both authorize and capture funds (the credit card is debited). Choose "Authorization Only" to authorize the credit card, but not capture the funds.

  When an order is received, ProductCart considers the order *processed* when funds have been captured, *pending* when it funds have been authorized, but not captured (payment has not been collected yet). Refer to the *Managing Orders* section of this User Guide for more information.
- Processing Fee. You can choose whether to charge an additional transaction fee using the *Processing Fee* field. The fee can be either a flat charge or a percentage of the total order amount.

- Payment Name. You can change the description that is shown to your customers during checkout. For example, you could change "Credit Card" to "Visa and MasterCard". To complete the activation, submit the form by clicking the *Add* button.

For testing purposes, you can use the following credit card number (note that this credit card number and expiration change over time: check with Echo for an updated one if this does not work or has expired).

Card number: 4005550000000019

Expiration: 12/04

Amounts allows: the order amount must be between $1 and $1.99. Otherwise the transaction is declined.

FastCharge

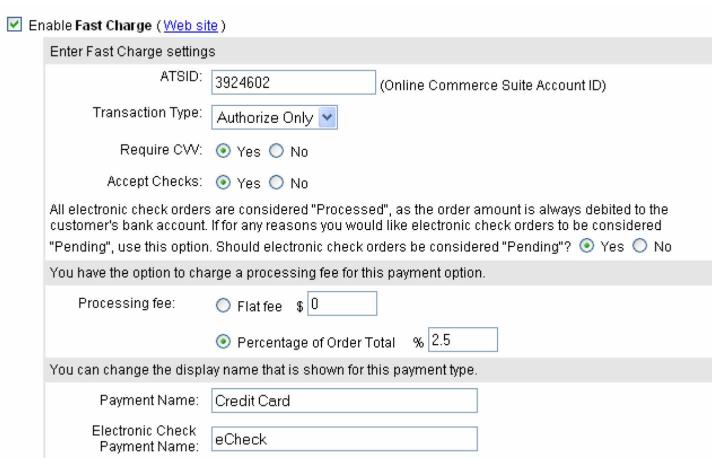
To use FastCharge with your ProductCart-powered store, you will need to ensure that the Web server that is hosting your store has the necessary software installed. The software is part of the "Distribution Package" that can be downloaded from this page:

http://www.secure-fastcharge.com/docs/index.taf?topic=download

If you are hosting your store with a third-party, contact your Web hosting company and ask them if they support FastCharge, or if they can install the corresponding software on their server..

Once you have ensured that your Web server can support FastCharge, enabling the payment gateway in ProductCart is quite simple. There are no settings that need to be configured on the payment gateway side to make the system work with your ProductCart store. All you need to do is enter the information described below using the Control Panel.

From the Control Panel navigation, select: *Payment Options > Add New Options > Real-time credit card processing…* to load the *Add Real-Time Payment Option* form. Select *FastCharge* from the list of available payment gateways, and you will be taken to a section of the page where you can configure the following settings:



- ATSID: enter your Online Commerce Suite Account ID. To test the system, use "TEST0" as the account ID (that is the word "TEST" plus the number 0).
- Transaction Type. Can be set as either "Sale" or "Authorize Only". Choose "Sale" to both authorize and capture funds (the credit card is debited). Choose "Authorize Only" to authorize the credit card, but not capture the funds. When an order is received, ProductCart considers the order processed when funds have been captured, pending when funds have been authorized, but not captured (payment has not been collected yet).
- Accept Checks. Select "Yes" if you are setup to accept electronic checks through FastCharge. All eCheck orders are automatically considered *Processed* by ProductCart, as the order amount is always debited to the customer's bank account. This is true regardless of which Transaction Type setting you choose for your store. If for any reasons you would like eCheck orders to be considered *Pending*, use this option. You will then need to process these orders from the *Process Order* page.
- Processing Fee. You can choose whether to charge an additional transaction fee using the Processing Fee field. The fee can be either a flat charge or a percentage of the total order amount.
- Payment Name. You can change the description that is shown to your customers during checkout. For example, you could change "Credit Card" to "Visa/Mastercard".
- Electronic Check Payment Name. You can change the description that is shown to your customers during checkout. For example, you could change "Electronic Check" to "FastCharge eCheck".

To complete the activation, make sure to check the box to the left of "Enable FastCharge", and then submit the form by clicking the "Add Selected Options" button at the bottom of the page.

Fast Transact

Before activating Fast Transact in the Control Panel, you will need to configure a series of settings in the Fast Transact administration system. Under "Setup", you'll find an option for "Browse Sites". Typically there will be a default site already set up for your account. Some customization will be necessary to set up a smooth payment system.

Click on "config" next to the default website, or choose a short site tag, website name, and URL, choose "Add Site", and then click "config" next to the new site.

The Site Tag is a nickname for your website, and will be submitted along with the transaction data for each transaction. It's possible to set up multiple websites, and you can use the site tag to differentiate between payments for each site. There is no limit on the number of sites you can have configured in the Fast Transact administration area.

Most of the options under the site configuration screen are self explanatory. Here are some that pertain to ProductCart

- Return URL - This is the HTML or CGI page on your site that the customer is sent to after completing payment. This should be a secure page to prevent alert messages that warn of a non-secure site. Replace www.yourStore.com with your Web store's address:

https://www.yourStore.com/productcart/pc/gwReturn.asp

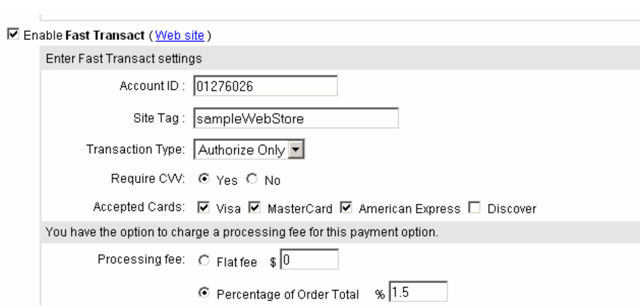
- Give Up URL - This is where a customer is sent if a transaction is rejected too many times. How many attempts are allowed is defined in the system under Security > Risk Management. The Give UP page should be a secure page to prevent alert messages that warn of a non-secure site. Replace www.yourStore.com with your Web store's address:
  https://www.yourStore.com/productcart/pc/giveUp.asp
- Postback CGI URL - After processing each transaction, transaction data is sent to this CGI script. The page should be a secure page to prevent alert messages that warn of a non-secure site. Replace www.yourStore.com with your Web store's address:
  https://www.yourStore.com/productcart/pc/ gwReturn.asp
- Return Method – Set this property to GET.

Once you have completed the steps listed above choose "Apply". At the top of the screen you will find an area where you can enter specify which payment receipts should be sent under what circumstances. Note that these e-mail receipts are sent by the payment gateway, in addition to the e-mail messages sent by ProductCart.

You are now ready to go back to ProductCart and complete the payment gateway configuration by filling out the following fields on the *Add Real-Time Payment Option* form:

- Account ID: This is the account ID that you were given when your account was set up.
- Site Tag: This is the site "nickname" that you gave your site when it was set up. Both Account ID and Site Tag can be located when you sign into your account and browse your site at fasttransact.com.
- Transaction Type. Select a transaction type from the drop-down menu. You can use Fast Transact to either authorize or authorize & capture funds during a transaction. If you select Sale, the credit card is authorized and debited. If you select Authorize Only, the credit card is authorized, but not debited. In the second scenario, the transaction is not settled (and therefore funds are not deposited into your back account), until you either manually capture funds using the Fast Transact administration console.

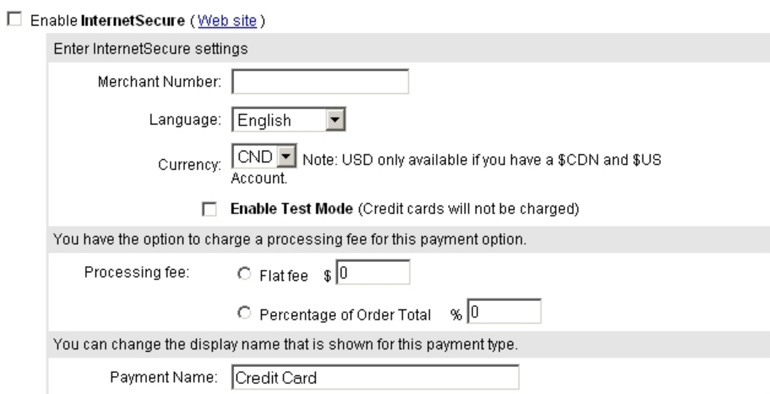
  When an order is received, ProductCart considers the order *processed* when funds have been captured, *pending* when it funds have been authorized, but not captured (payment has not been collected yet). Refer to the *Managing Orders* section of this User Guide for more information.
- Require CVV. For added security, you can require customers to enter their card's CVV on the payment details form. For more information about the CVV code, see a previous section in this chapter.



- Accepted Cards. The select the credit card types you accept on your store.
- Processing Fee. You can choose whether to charge an additional transaction fee using the *Processing Fee* field. The transaction fee can either be a set amount or a percentage of the total order amount (e.g. 2.3% of the total).
- Payment Name. You can change the description that is shown to your customers during checkout. For example, you could change "Credit Card" to "Visa and MasterCard". To complete the activation, submit the form by clicking the *Add* button.

Internet Secure

Enabling InternetSecure as your payment gateway in ProductCart is very simple. Select: *Payment Options > Add New Options > Real-time credit card processing…* to load the *Add Real-Time Payment Option* form. Select Internet Secure from the list of available payment gateways, and you will be taken to a section of the page where you can configure the following settings:



- Merchant Number: Enter the Merchant Number that was provided to you when you set up your account.
- Language. Select your default language.
- Currency: Select your default currency.
- Enable Test Mode. Check this option to use the gateway in test mode.
- Processing Fee. You can choose whether to charge an additional transaction fee using the Processing Fee field. The fee can be either a flat charge or a percentage of the total order amount.
- Payment Name. You can change the description that is shown to your customers during checkout. For example, you could change "Credit Card" to "Visa/Mastercard".

To complete the activation, make sure to check the box to the left of "Enable InternetSecure", and then submit the form by clicking the "Add Selected Options" button at the bottom of the page.

iTransact

To integrate ProductCart with iTransact first log into the iTransact Control Panel. The only setting that ProductCart requires to be configured is the "Post-Bck URL". This variable needs to be set to the following value: http://www.yourStore.com/productcart/pc/gwReturn.asp

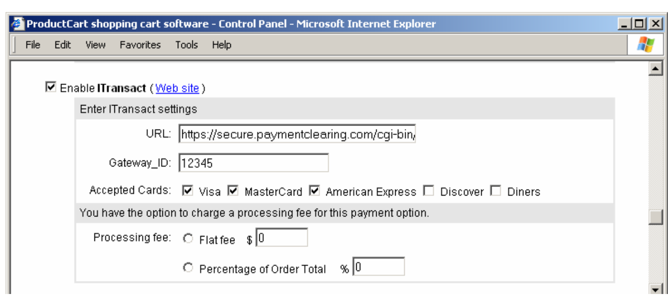
The "Recurring" option also needs to be checked.

You are now ready to go back to ProductCart to finish setting up iTransact.

- Check the box "Enable iTransact"
- Enter the following URL in the URL field:

  URL: https://secure.paymentclearing.com/cgi-bin/rc/ord.cgi

- Under <u>Gateway_ID</u>, enter the Gateway ID that you were given when you setup your iTransact account.
- <u>Accepted Cards</u>. Specify the credit card types that are accepted on your store.
- <u>Processing Fee</u>. You can choose whether to charge an additional transaction fee using the *Processing Fee* field. The fee can be either a flat charge or a percentage of the total order amount.
- <u>Payment Name</u>. You can change the description that is shown to your customers during checkout. For example, you could change "Credit Card" to "Visa and MasterCard". To complete the activation, submit the form by clicking the *Add* button.



LinkPoint Connect

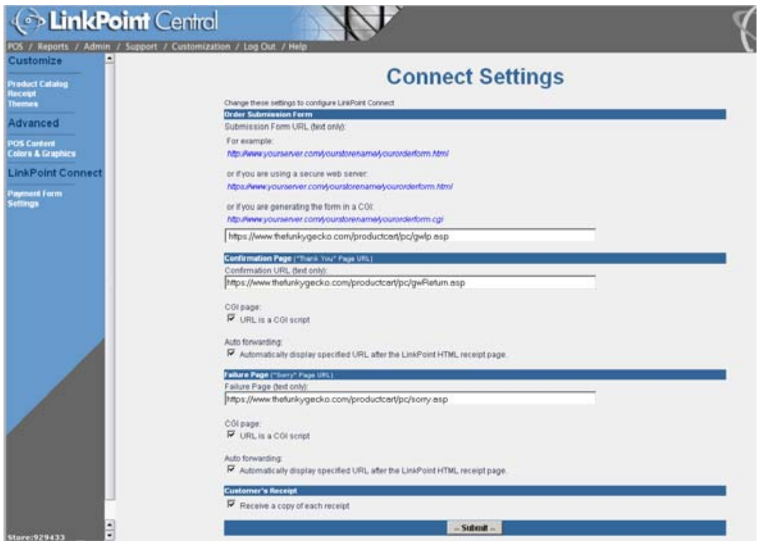
You can easily setup ProductCart to work with LinkPoint Connect (formerly LinkPoint Basic). When your account is set up on the LinkPoint Payment Gateway, you will receive an introductory e-mail entitled, "Welcome to LinkPoint HTML." The following information is included in this e-mail (print the welcome letter and store it in a secure place):

- Your "doing business as" (DBA) store name.

- Your store name (typically represented by a six-digit number). This 6-digit number is the only piece of information you will need to complete the integration with ProductCart.
- Your user ID number, secure host name, and instructions for obtaining your activation password.

Before activating the gateway within ProductCart, you will need to configure a few settings using the LinkPoint administration console, called LinkPoint Central. Log into LinkPoint Central using the login information you received when you setup your account.. The first time you access LPC with your temporary password, you will be prompted to change your password. Once you are logged in, click on "Customization" from the top navigation menu.

To log into LinkPoint Central, go to: https://secure.linkpt.net/lpcentral/docs/login.html



Select "Settings" from the left navigation and set the settings as follows:

- Order Submission Form URL. The URL should be formatted as follows (replace the path to ProductCart as needed).

  https://www.yourStore.com/productcart/pc/gwlp.asp

  Note that the URL above and the ones shown below use SSL (the URLs being with "https" rather then "http"). You can input URLs that do not use SSL. However, we strongly recommend that you use an SSL certificate as credit card information is sent to the gateway. The HTTPS protocol ensures that such information is sent in an encrypted format.
- "Thank You" Page URL. The URL should be formatted as follows (replace the path to ProductCart as needed).

  https://www.yourStore.com/productcart/pc/gwReturn.asp
- Check here if this url is a CGI script. Must be checked.
- Check if you wish to automatically display specified URL after the LinkPoint HTML receipt page. Must be checked.

- "Sorry" Page URL. The URL should be formatted as follows (replace the path to ProductCart as needed).

  https://www.yourStore.com/productcart /pc/sorry.asp

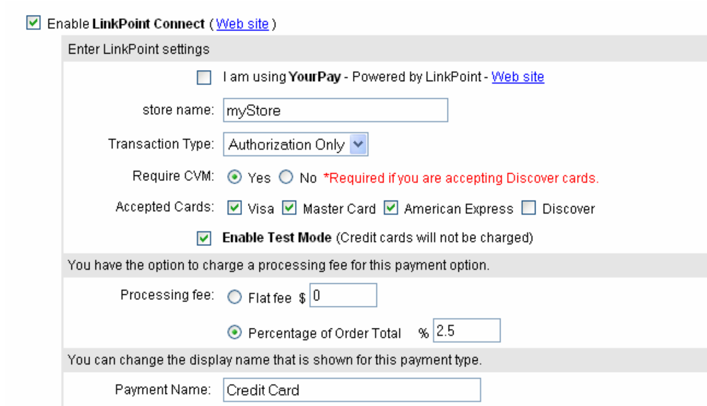
- Check here if this url is a CGI script. Must be checked.
- Check if you wish to automatically display specified URL after the LinkPoint HTML receipt page. Must be checked.
- Receive a copy of each receipt. Check this option if you want customers to receive an email receipt from LinkPoint (on top of the order confirmation email that will be sent from ProductCart). This option can be checked or left blank.

Click on the "Submit" button to save your changes.

To place the system in "Test" mode from the LinkPoint administration area, follow these steps. When the system is in test mode, credit cards are never charged.

- Click on "Admin" from the top menu.
- Click on "Live/Test Mode"
- Set your gateway into "Test" mode.

Note that this is different from using the *Enable Test Mode* option discussed below.



You are now ready to go back to ProductCart to finish setting up LinkPoint Connect.

- Check the box "Enable LinkPoint Connect"
- I'm using YourPay. If you are using YourPay, a payment gateway that is powered by LinkPoint, check this box. Otherwise, leave this option unchecked. When you check this option ProductCart will post transactions to a processing server that is different from the one using by other LinkPoint customers. So it is very important that this option is properly set. Otherwise transactions will not be processed correctly.
- Under Store name, enter the store name that LinkPoint assigned to you when you signed up for your LinkPoint account.

- Transaction Type can be set as either "Sale" or "Authorization Only". Choose "Sale" to both authorize and capture funds (the credit card is debited). Choose "Authorization Only" to authorize the credit card, but not capture the funds.

  When an order is received, ProductCart considers the order *processed* when funds have been captured, *pending* when it funds have been authorized, but not captured (payment has not been collected yet). Refer to the *Managing Orders* section of this User Guide for more information.

- Test Mode. LinkPoint may have provided you with a "staging" account, along with your "live" account, for testing purposes. When you use a test account, transactions are sent to a different server for authorization (staging.linkpoint.net). If this is the case, you can test the system using LinkPoint's staging servers. To do so check the Enable Test Mode option in ProductCart. This is not the same as placing the gateway in test mode via LinkPoint Central, where you are testing using your LIVE Account. According to the technical documentation that we have access to, LinkPoint does not "recommend performing tests with your LIVE account other than those necessary to validate correct functionality of your live account. Please request a test account if you need to do extensive testing."

  For testing purposes, you can use any of the card numbers listed below. These are test card numbers that will not result in any charges to the card. Use these card numbers with any expiration date in the future.

  - MasterCard: 5419-8400-0000-0003
  - Visa®: 4111-1111-1111-1111

- Processing Fee. You can choose whether to charge an additional transaction fee using the *Processing Fee* field. The fee can be either a flat charge or a percentage of the total order amount.

- Payment Name. You can change the description that is shown to your customers during checkout. For example, you could change "Credit Card" to "Visa and MasterCard". To complete the activation, submit the form by clicking the *Add* button.

Moneris' eSelect Plus

ProductCart uses the Direct Post Method to connect to Moneris. Once you have setup an account with Moneris, you will receive a Store ID or "eSelect plus Store ID". You are now ready to activate Moneris in ProductCart.

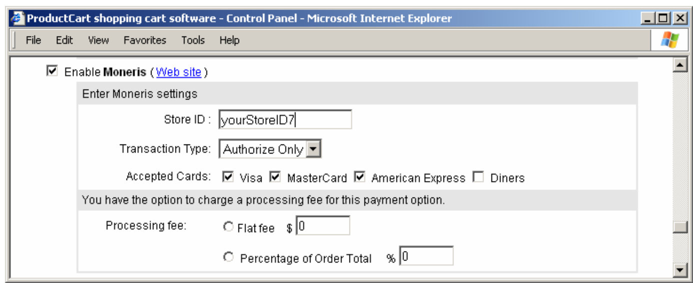
- Check the box "Enable Moneris"

- Under Store ID, enter the a Store ID or "eSelect plus Store ID that you received when you setup your account with Moneris.

- Transaction Type can be set as either "Purchase" or "Authorize Only". Choose "Purchase" to both authorize and capture funds (the credit card is debited). Choose "Authorize Only" to authorize the credit card, but not capture the funds.

  When an order is received, ProductCart considers the order *processed* when funds have been captured, *pending* when it funds have been authorized, but not captured (payment has not been collected yet). Refer to the *Managing Orders* section of this User Guide for more information.

- Accepted Credit Cards. Specify which credit cart types are accepted on your store.
- Processing Fee. You can choose whether to charge an additional transaction fee using the *Processing Fee* field. The fee can be either a flat charge or a percentage of the total order amount.
- Payment Name. You can change the description that is shown to your customers during checkout. For example, you could change "Credit Card" to "Visa and MasterCard". To complete the activation, submit the form by clicking the *Add* button.



Payflow Link by VeriSign

To setup ProductCart to work with your Payflow Link gateway account, first log into the VeriSign Manager and click on "Account Info", then select "Payflow Link Info". Here you will be able to customize your form for collecting customer data. ProductCart requires the settings at the top of the page under "Form Configuration" to be set as follows.

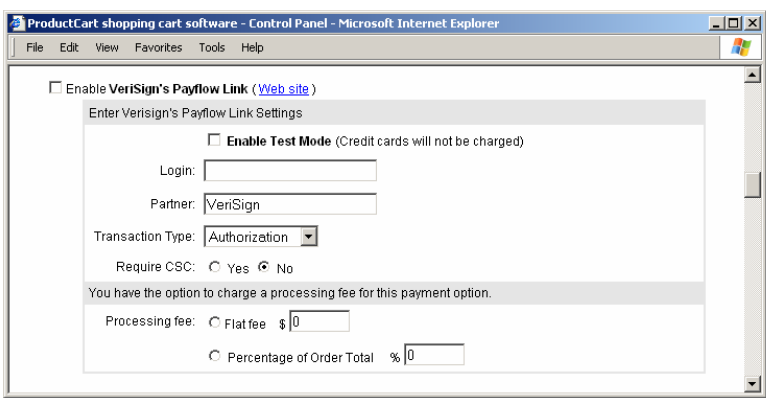
- Return URL Method: POST
- Return URL: http://www.yourStore/productcart/pc/gwReturn.asp
- Silent POST URL: Leave blank
- Force Silent Post Confirmation: Leave blank
- Failed Silent Post Return URL: Leave blank
- Billing Information: Check all the fields that you would like to capture within the "Required Fields" area. Leave the "Editable Fields" option blank, unless you want to allow the customer to change information after they have left you store.
- Shipping Information: Check all the fields that you would like to capture within the "Required Fields" area. Leave the "Editable Fields" option blank, unless you want to allow the customer to change information after they have left you store site.
- Transaction Process Mode: Set to TEST until you are ready to turn your store on live.
- General Display Options: Not required for ProductCart.
- Receipt Display Options: Not required for ProductCart.
- Email Receipt to Customer: Set this option to "Yes" and fill out the "Email from Merchant Address" fields if you want customers to receive an email receipt from the

payment gateway in addition to the order confirmation email that will be sent from ProductCart. Otherwise, leave the option set to “No”.

- Email to Merchant Address: The e-mail address of the store administrator that will receive payments notifications from VeriSign.
- Email to Merchant Address: A second e-mail address that will receive payments notifications from VeriSign.
- Email Header Text & Email Footer Text: You have the option to add extra text to your emails. Not required by ProductCart. Fill out these fields if you opted to have the gateway send out an e-mail receipt.

In addition, set up the following “Security Options”:

- AVS: (Address Verification Service): Set this option at your desired level.
- CSC: (Card Security Code Validation Service). Enable or disable this option as you prefer. This is the same as the CVV code mentioned earlier in this chapter. If you check this option, you must also check the CSC field when activating the gateway in the ProductCart Control Panel, as mentioned below.
- Accepted URLs 1-5: These fields should contain all domains that you are going to be submitting posts from. For ProductCart the default URL is: http://www.yourStore.com/. Another URL on the same domain, for example, could be http://store.yourStore.com Note: do NOT use https:// even if you have an SSL certificate installed on your Web server. The system will not allow it.



You are now ready to go back to ProductCart to finish setting up Payflow Link.

- Check the box Enable VeriSign’s Payflow Link.
- Enable Test Mode: You can set Payflow Link to run in Test Mode directly from ProductCart, without having to log into the Payflow Link administration area. When you use Payflow Link in test mode, make sure to use one of the following test credit card numbers, or the transaction will be declined.

Use these card numbers for Testing Only. Be sure that your Payflow Pro or your Payflow Link settings are set to test. Otherwise the transactions will fail.

Test Credit Card Numbers		
Card Type	Card Number	Number Characters
Master Card	5105105105105100	(16) Characters
Master Card	5555555555554444	(16) Characters
Master Card	4222222222222	(13) Characters
VISA	4111111111111111	(16) Characters
VISA	4012888888881881	(16) Characters
American Express	378282246310005	(15) Characters
American Express	371449635398431	(15) Characters
Amex Corporate	378734493671000	(15) Characters
Dinners Club	38520000023237	(14) Characters
Dinners Club	30569309025904	(14) Characters
Discover	6011111111111117	(16) Characters
Discover	6011000990139424	(16) Characters
JCB	3530111333300000	(16) Characters
JCB	3566002020360505	(16) Characters

- Under Login, enter the Login ID used to log into the Payflow Link administration area.
- Transaction Type can be set as either "Payment/Sale" or "Authorization". Choose "Payment/Sale" to both authorize and capture funds (the credit card is debited). Choose "Authorization Only" to authorize the credit card, but not capture the funds.

  When an order is received, ProductCart considers the order *processed* when funds have been captured, *pending* when it funds have been authorized, but not captured (payment has not been collected yet). Refer to the *Managing Orders* section of this User Guide for more information.
- Require CSC. This is the same as the CVV code mentioned earlier in this chapter. If you check this option, you must also check the CSC field when activating the gateway in the ProductCart Control Panel, as mentioned below.
- Processing Fee. You can choose whether to charge an additional transaction fee using the *Processing Fee* field. The fee can be either a flat charge or a percentage of the total order amount.
- Payment Name. You can change the description that is shown to your customers during checkout. For example, you could change "Credit Card" to "Visa and MasterCard". To complete the activation, submit the form by clicking the *Add* button.

Payflow Pro by Verisign

Unlike with Payflow Link, Payflow Pro requires a client program to reside on your Web server. If you do not have the ability to install applications on your Web server, this solution will not work for you, and you should opt to go with Payflow Link.

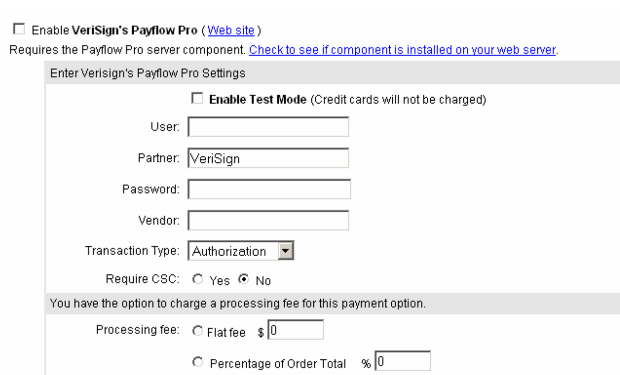
The client is available on all major Web server platforms in a variety of formats to support integration requirements. It can be integrated as a Web-based or a non-Web-based application. It does not require the HTTP protocol to run, which allows for greater flexibility in configuration and reduced processing overhead for faster performance. For more information, consult the Payflow Pro Developer's Guide.

Once you have determined that your Web server supports Payflow Pro, and have obtained an account through VeriSign, follow these instructions to activate the gateway in the ProductCart Control Panel.

- Enable Test Mode: You can set Payflow Pro to run in Test Mode directly from ProductCart, without having to log into the Payflow Pro administration area. When you use Payflow Pro in test mode, make sure to use one of the test credit card numbers listed above in the Payflow Link section, or the transaction will be declined.
- User: Enter your Payflow Pro login (case-sensitive).
- Partner: Enter your Partner ID or "VeriSign", if you don't have a Partner ID.
- Password: Your case-sensitive password.
- Vendor: Enter your Payflow Pro login (case-sensitive). "Vendor" is being reserved by VeriSign for future use, but for now it's the same as the User field.
- Transaction Type can be set as either "Payment/Sale" or "Authorization". Choose "Payment/Sale" to both authorize and capture funds (the credit card is debited). Choose "Authorization Only" to authorize the credit card, but not capture the funds.

  Note that when Payflow Pro is set to authorize, but not capture funds, credit card information is encrypted and stored in the store database. When it's set to capture funds (Payment/Sale), credit card information is not stored in the store database. Storing credit card information is required to successfully process the order(s) using the batch processing feature. When orders are batch processed, two scenarios can occur. If the order amount has not changed, funds are immediately captured. If the order amount has changed, then Payflow Pro resubmits the transaction to the payment processor, receives a new authorization for the order amount, and then captures those funds. See *Combining Order Editing and Batch Processing* for more information.

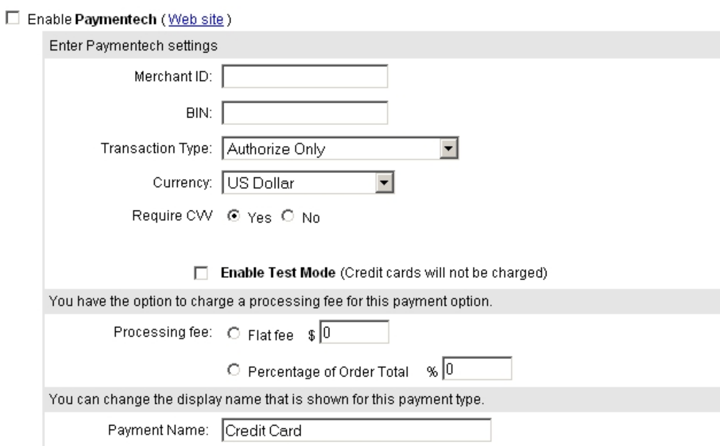
  When an order is received, ProductCart considers the order *processed* when funds have been captured, *pending* when it funds have been authorized, but not captured (payment has not been collected yet). Refer to the *Managing Orders* section of this User Guide for more information.



- Require CSC. This is the same as the CVV code mentioned earlier in this chapter. If you check this option, you must also check the CSC field when activating the gateway in the ProductCart Control Panel, as mentioned below.
- Processing Fee. You can choose whether to charge an additional transaction fee using the *Processing Fee* field. The fee can be either a flat charge or a percentage of the total order amount.
- Payment Name. You can change the description that is shown to your customers during checkout. For example, you could change "Credit Card" to "Visa and MasterCard". To complete the activation, submit the form by clicking the *Add* button.

Paymentech

Enabling Paymentech as your payment gateway in ProductCart is very simple. Select: *Payment Options > Add New Options > Real-time credit card processing…* to load the *Add Real-Time Payment Option* form. Select *Paymentech* from the list of available payment gateways, and you will be taken to a section of the page where you can configure the following settings:



- Merchant ID: Enter the Merchant ID that was provided to you when you set up your account.
- BIN. Paymentech uses BIN **000001** (Salem Platform) or BIN **000002** (Tampa Platform). Please contact your technical analyst or relationship manager if you are unsure which Platform your merchant account resides on, and then enter it here.
- Transaction Type. Choose "Authorize and Mark for Capture" to capture funds at the time the customer checks out (the credit card is debited). Choose "Authorize Only" to authorize the credit card, but not capture the funds at this time. You will then capture funds after you have reviewed or shipped the order, by logging in to your Paymentech Control Panel. When an order is received, ProductCart considers the order processed when funds have been captured, pending when funds have been authorized, but not captured (payment has not been collected yet).
- Currency: Select your default currency.

- Require CVV: For added security, you can require customers to enter their card's CVV (security code) on the payment details form. For more information about the CVV code, see a previous section in this chapter.
- Enable Test Mode. Check this option to use the gateway in test mode.
- Processing Fee. You can choose whether to charge an additional transaction fee using the Processing Fee field. The fee can be either a flat charge or a percentage of the total order amount.
- Payment Name. You can change the description that is shown to your customers during checkout. For example, you could change "Credit Card" to "Visa/Mastercard".

To complete the activation, make sure to check the box to the left of "Enable Paymentech", and then submit the form by clicking the "Add Selected Options" button at the bottom of the page.

PayPal

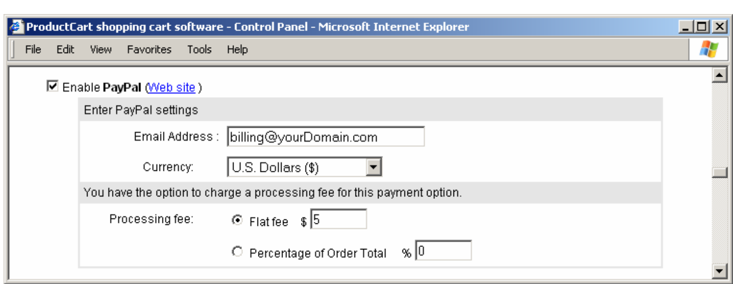
Before you can use PayPal as a payment option, you will need a PayPal account. If you don't already have a PayPal account, you can quickly create a Personal or Business Account online at the following address: http://www.paypal.com/

Make sure to sign up for a business PayPal account. Once your account has been created, select *Profile* from the navigation bar and click on *Instant Payment Notification Preferences* under *Selling Preferences*. ProductCart uses this new PayPal technology to update the store database after an order has been paid for using PayPal. By default, Instant Payment Notification is turned off. Turn it on and enter the following address in the URL field:

http://www.yourstore.com/productcart/pc/paypalOrdConfirm.asp

Now go to the *Website Payment Preferences* area and locate the setting called *Auto Return*. Make sure that this feature is disabled.

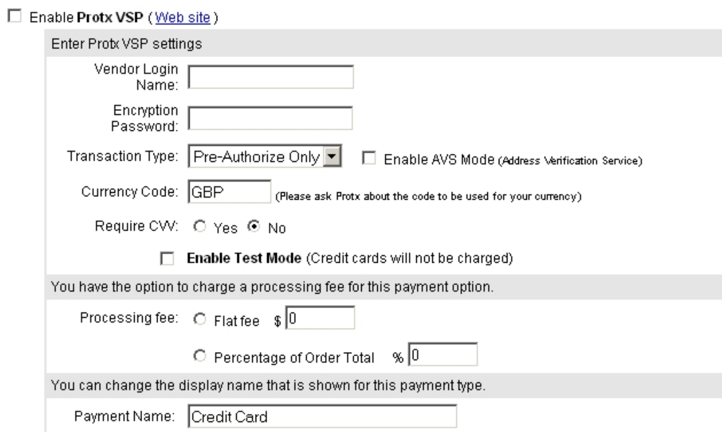
Now that your PayPal account has been setup, you can go back to ProductCart and configure PayPal as a payment option. ProductCart is already setup to use PayPal. The two pieces of information that you need to provide to make it an active payment option are the e-mail address used for your PayPal account and the currency used on your store. Enter that address in the e-mail field, and then click on the *Add* button. For more information about using PayPal, see the section entitled *About PayPal Payments*.



ProtX

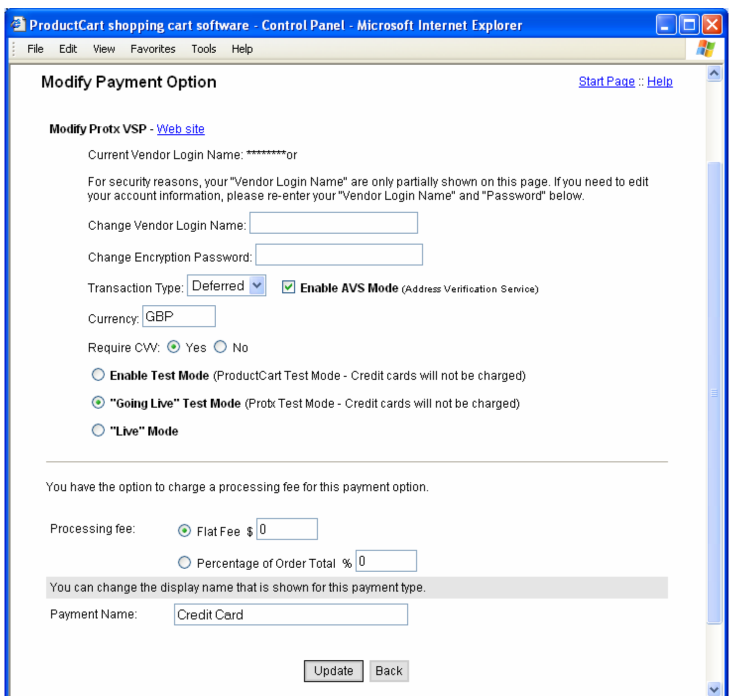
Enabling Protx as your payment gateway in ProductCart is very simple. There are no settings that need to be configured in the ProtX administration area. The only steps that need to be taken to activate ProtX as the payment gateway for your store are the ones listed below.

Select: *Payment Options > Add New Options > Real-time credit card processing…* to load the *Add Real-Time Payment Option* form. Select *Protx* from the list of available payment gateways, and you will be taken to a section of the page where you can configure the following settings:



- Vendor Login Name: Enter the Vendor Login Name that was provided to you when you set up your account.
- Encryption Password. Enter your Encryption Password here.
- Transaction Type. There are three methods of handling a transaction:
    - Choose "Payment" to authorize and capture funds immediately (the credit card is debited and the payment is settled immediately). When you do so, orders will be considered "Processed" by ProductCart, since payment for the order has already been finalized.
    - Choose "Deferred" if you want to authorize and debit the credit card, but not immediately settle the transaction, which can be settled at a later time. ProductCart will consider these orders "Pending" since payment for the order has not been finalized.
- Enable AVS Mode. Check this option if you want the system to perform a verification of the customer's billing address against the address on file for the credit card used for the transaction.
- Currency: Please ask Protx about the code to be used for your currency.
- Require CVV: For added security, you can require customers to enter their card's CVV (security code) on the payment details form. For more information about the CVV code, see a previous section in this chapter.

- Enable Test Mode. Check this option to use the gateway in test mode. There are two different testing modes for Protx, but you will only see one *Enable Test Mode* option when you first activate the payment gateway. The following paragraphs explain why and what the process is.
  - The regular test mode, which you set in ProductCart when you first activate the Protx, always posts transactions to the Protx testing server. It uses a vendor login name called "testvendor", which is hard-coded into the ASP files used by ProductCart, and always posts a unique order ID. You do not need to change your vendor login name when using this test mode. These transactions are never reviewed by Protx and are merely used to test the connection to the gateway. When you first activate Protx, if you check the *Enable Test Mode* option, your store will use this special test mode, which will allow you to test the ability for your store to connect to the payment gateway. Protx recommends using this test mode account before requesting to "go live" with your account.



  - Once you are confident that the store is working properly, contact Protx to have them turn your account into production mode. Protx will then set up a "Unique test account" on the Protx Test Server. At this point go back to the Control Panel and select *Payment Options > View/Modify Options* and click on the *Modify* button next to Protx. Switch from *Enable Test Mode* to *Going Live Test Mode.* The test transactions that you submit are now sent to the reporting facility for review before your account is turn on "live" mode. Protx will send you an email that lists the steps need to be completed before your account can be switched to "live" mode.

- After reviewing the test transactions, Protx will make the account live and notify you. At this point you can once again log into the Control Panel and edit the Protx settings by switching to *Live Mode*.
- If at anytime you wish to place the account back into test mode, so that credit cards don't get charged, select *Enable Test Mode,* not the *Going Live Test Mode*.

- Processing Fee. You can choose whether to charge an additional transaction fee using the Processing Fee field. The fee can be either a flat charge or a percentage of the total order amount.
- Payment Name. You can change the description that is shown to your customers during checkout. For example, you could change "Credit Card" to "Visa/Mastercard".

To complete the activation, make sure to check the box to the left of "Enable Protx", and then submit the form by clicking the "Add Selected Options" button at the bottom of the page.

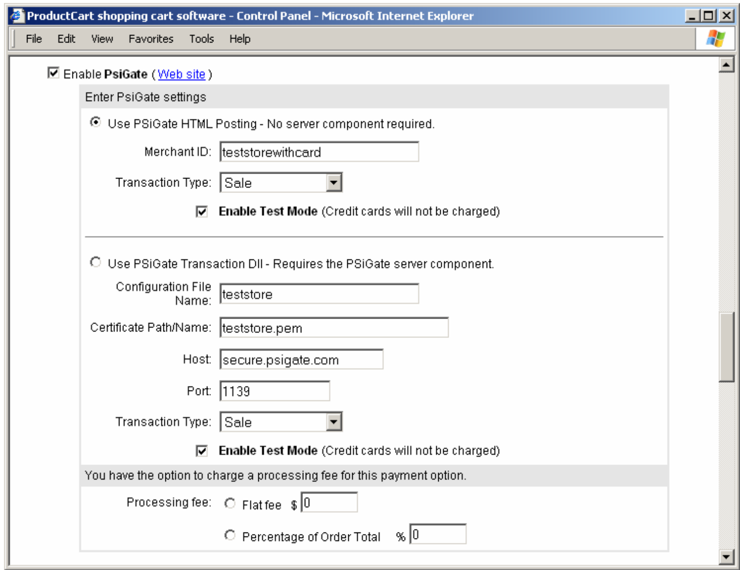
PsiGate

There are two ways to integrate ProductCart with PsiGate: using the HTML Posting method, which does not require a server component, and using the PsiGate Transaction DLL, which requires a special server component. Before using the second integration method, enquire with your Web hosting company to ensure the DDL is installed on the server.

To use the PsiGate HTML Posting, configure the following settings. You can use the pre-filled entries for testing purposes.

- Merchant ID: User "teststorewithcard" for testing. To use the gateway in live mode, replace the testing entry with the Merchant ID that was provided to you when you set up an account with PsiGate.
- Transaction Type can be set as either "Sale" or "Pre-Authorization". Choose "Sale" to both authorize and capture funds (the credit card is debited). Choose "Pre-Authorization Only" to authorize the credit card, but not capture the funds.

  When an order is received, ProductCart considers the order *processed* when funds have been captured, *pending* when it funds have been authorized, but not captured (payment has not been collected yet). Refer to the *Managing Orders* section of this User Guide for more information.
- Enable Test Mode. Check this option and use the test Merchant ID mentioned above to use the gateway in test mode. Credit cards are not charged.
- Processing Fee. You can choose whether to charge an additional transaction fee using the *Processing Fee* field. The fee can be either a flat charge or a percentage of the total order amount.
- Payment Name. You can change the description that is shown to your customers during checkout. For example, you could change "Credit Card" to "Visa and MasterCard". To complete the activation, submit the form by clicking the *Add* button.



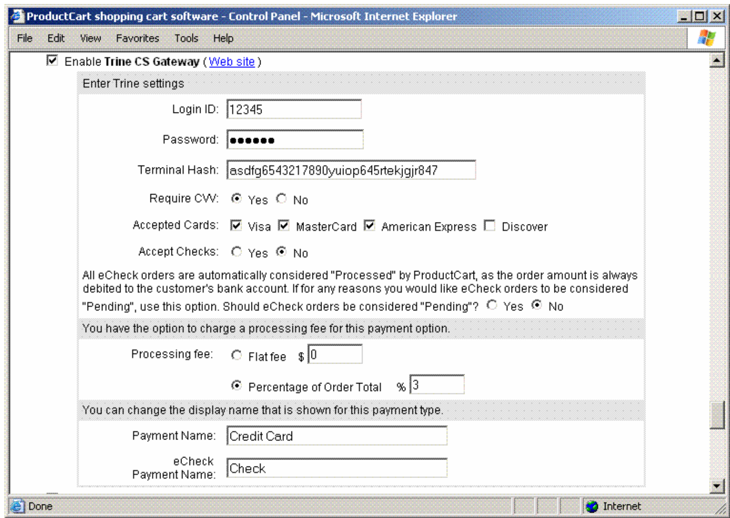
To integrate your store with PsiGate using the Transaction DLL, configure the following settings (consult the documentation provided by PsiGate for more information):

- Configuration File Name: Enter the name of the configuration file to use. This is the same as the merchant configuration file name without the .config extension. This is piece of information is provided by PsiGate.
- Certificate Path/Name: The full path and filename of the certificate. This is the merchant certificate downloaded from PsiGate.
- Host: The name of the server that ssl_server is running on. Default is "secure.psigate.com", which can be used for testing.
- Port: The port the ssl_server is listening on. Default is "1139", which can be used for testing.
- Transaction Type: This is the same as for the HTML Posting method.
- Enable Test Mode: This is the same as for the HTML Posting method.
- Processing Fee. This setting is shared with the HTML Posting method.

Trine Commerce Systems

Enabling your Trine CS account in ProductCart is simple. There is nothing that needs to be configured inside the administration area of your Trine CS account. All you have to do is enter your account information on the *Add Real-Time Payment Option* form and configure the additional settings listed below.

Note that credit card transactions processed through Trine CS are always pending until you log into your Trine CS account to settle them. Therefore, ProductCart orders will always be considered *Pending* and will have to be processed in the Control Panel. Processing an order in the Control Panel will not settle the corresponding transaction within the gateway. The only way to do so is by logging into your Trine CS account.



Select *Payment Options > Add New Options > Real-time credit card processing…* to load the *Add Real-Time Payment Option* form. Select *viaKLIX* from the list of available payment gateways, and you will be taken to a section of the page where you can configure the following settings:

- Login ID: The login used to access your account on the Trine CS Web site.
- Password: The password used to access your account on the Trine CS Web site.
- Terminal Hash: A 32 byte identification string assigned to you by Trine CS. The hash code is a critical element of connecting to the TCS Gateway. This hash code uniquely identifies the specific terminal that it is related to (one store = one terminal). To find your hash code, follow these steps:
    - Log in to your account
    - Select Options > Select Terminal > Select Modify Terminal
    - Select the Terminal. The terminal hash will be displayed on the following screen. Copy and paste this code directly into the form shown above.
- Require CVV. For added security, you can require customers to enter their card's CVV on the payment details form. For more information about the CVV code, see a previous section in this chapter.
- Accept Cards: Specify which credit cards you accept.
- Accept Checks. You can accept electronic checks on your store when you are using the Trine CS payment gateway. This will be shown as another payment option during the checkout process. Note that all electronic check orders are considered "Processed", as the order amount is always debited to the customer's bank account. If for any reasons you would like electronic check orders to be considered "Pending', enable the corresponding option on the setup form.
- Processing Fee. You can choose whether to charge an additional transaction fee using the *Processing Fee* field. The fee can be either a flat charge or a percentage of the total order amount.
- Payment Name. You can change the description that is shown to your customers during checkout. For example, you could change "Credit Card" to "Visa and MasterCard".

- eCheck Payment Name. Enter a name for your electronic check processing capability, which will be shown to your customers during checkout as an available payment option (e.g. "eCheck").

To complete the activation, submit the form by clicking the *Add* button.

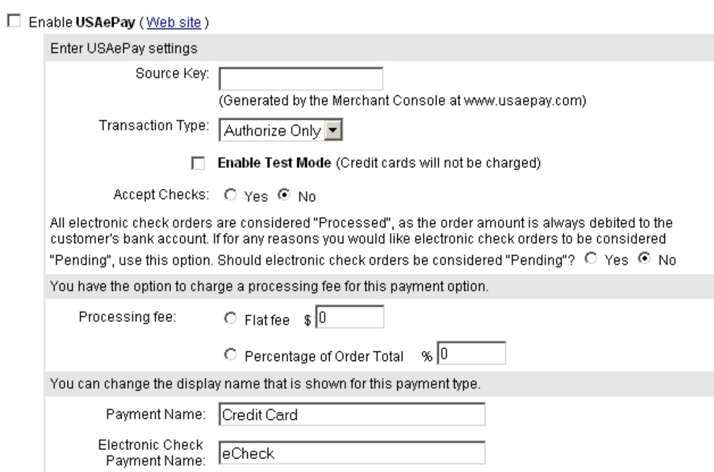
USAePay

To use USAePay with your ProductCart-powered store, you will need to ensure that the Web server that is hosting your store has the USAePay *XCharge* component installed. The software can be downloaded free of charge from this page:

http://www.usaepay.com/topics/xcharge.html

If you are hosting your store with a third-party, contact your Web hosting company and ask them if they support USAePay, or if they can install the corresponding software on their server.

Once you have ensured that your Web server can support USAePay, enabling the payment gateway in ProductCart is quite simple. Select: *Payment Options > Add New Options > Real-time credit card processing…* to load the *Add Real-Time Payment Option* form. Select *USA ePay* from the list of available payment gateways, and you will be taken to a section of the page where you can configure the following settings:



- Source Key: Enter the Source key generated by the Merchant Console at: www.usaepay.com
- Transaction Type. Can be set as either "Sale" or "Authorize Only". Choose "Sale" to both authorize and capture funds (the credit card is debited). Choose "Authorize Only" to authorize the credit card, but not capture the funds. When an order is received, ProductCart considers the order processed when funds have been captured, pending when funds have been authorized, but not captured (payment has not been collected yet).
- Enable Test Mode. Credit cards will NOT be charged. This is for testing your store only.
- Accept Checks. Select "Yes" if you are setup to accept electronic checks through USA ePay. All eCheck orders are automatically considered *Processed* by ProductCart, as the

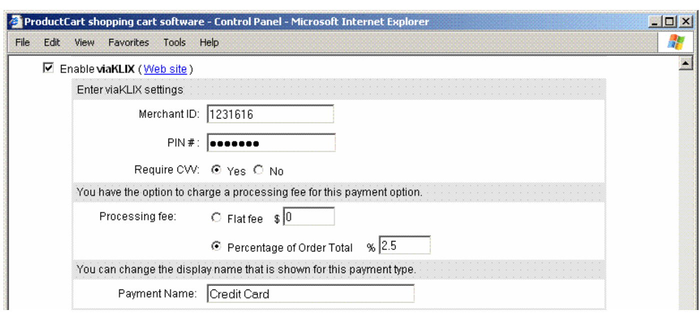
order amount is always debited to the customer's bank account. This is true regardless of which Transaction Type setting you choose for your store. If for any reasons you would like eCheck orders to be considered *Pending*, use this option. You will then need to process these orders from the *Process Order* page.

- Processing Fee. You can choose whether to charge an additional transaction fee using the Processing Fee field. The fee can be either a flat charge or a percentage of the total order amount.
- Payment Name. You can change the description that is shown to your customers during checkout. For example, you could change "Credit Card" to "Visa/Mastercard".
- Electronic Check Payment Name. You can change the description that is shown to your customers during checkout. For example, you could change "Electronic Check" to "USA ePay Check".

To complete the activation, make sure to check the box to the left of "Enable USA ePay", and then submit the form by clicking the "Add Selected Options" button at the bottom of the page.

viaKLIX

Enabling your viaKLIX account in ProductCart is simple. There is nothing that needs to be configured inside the administration area of your viaKLIX account. All you have to do is enter your account information on the *Add Real-Time Payment Option* form and configure the additional settings listed below.



Select *Payment Options > Add New Options > Real-time credit card processing…* to load the *Add Real-Time Payment Option* form. Select *viaKLIX* from the list of available payment gateways, and you will be taken to a section of the page where you can configure the following settings:

- Merchant ID: Enter the *Merchant ID* that was provided to you when you set up your account with viaKLIX.
- PIN: Enter your *PIN* number. To obtain your *PIN* number, following these instructions:
  - viaKLIX will provide you with a Merchant ID and a password when your account is created. Use this information to log into the administration console located at: https://www2.viaklix.com/Admin/login.asp
  - Click on "User Management", and then "Find/Edit User".
  - From the "Find/Edit User" page, click on the "Find" button.

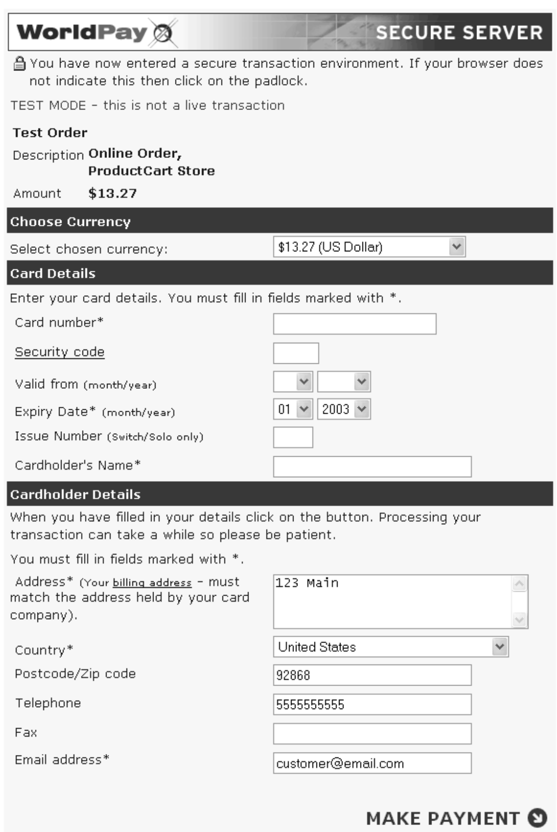
- Locate your User ID and click on it. The “Edit User” will be shown. Now click on “Edit Terminal Associations”. The *PIN* is shown on this page.

- Require CVV. For added security, you can require customers to enter their card’s CVV on the payment details form. For more information about the CVV code, see a previous section in this chapter.
- Processing Fee. You can choose whether to charge an additional transaction fee using the *Processing Fee* field. The fee can be either a flat charge or a percentage of the total order amount.
- Payment Name. You can change the description that is shown to your customers during checkout. For example, you could change “Credit Card” to “Visa and MasterCard”.

WorldPay

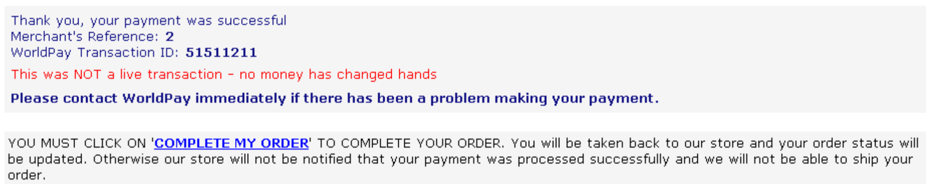
Similarly to what happens with PayPal, when you select WorldPay as your payment gateway, customers will temporarily leave your Web site to submit their payment information.

When customers click on the *Continue* button after verifying the correctness of the order on your store, they will temporarily leave your Web site and will be taken to a secure payment form located the WorldPay Web site (see image below). The billing address is passed to the payment gateway by ProductCart, so the customer won’t have to re-enter it. Once the transaction is processed, customers will be redirected back to your store.

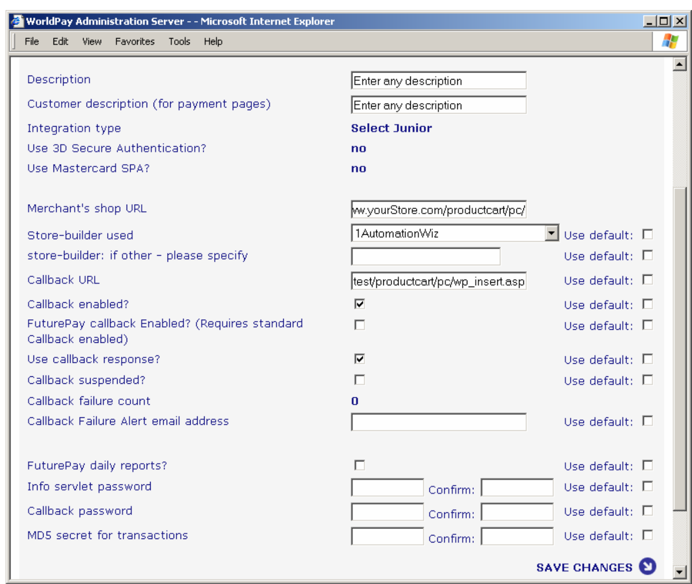


To process the payment, customers will enter their credit card information and then click on the *Make Payment* button. The transaction will be processed and a message will be returned to them. If the transaction is processed successfully, they will see a payment confirmation page. Once on this page, customers MUST CLICK ON 'COMPLETE MY ORDER' to complete their order.

A message on that page will remind them of this (the screen shot shown below was taken from a test transaction – the message will be similar during a live transaction).



When customers click on the *Complete My Order* link, they will be taken back to your store and their order status will be updated. If they don't click on the *Complete My Order* link, no information is sent back to your store, which means that there is no way for ProductCart to know that payment for the order was collected successfully. In that scenario, the order is treated as if it did not go through and therefore will not show up in the order reports. No order confirmation e-mails will be sent by ProductCart, but you should still receive a confirmation e-mail directly from WorldPay. If this occurs, you now know the reason: the customer likely forgot to complete the order.



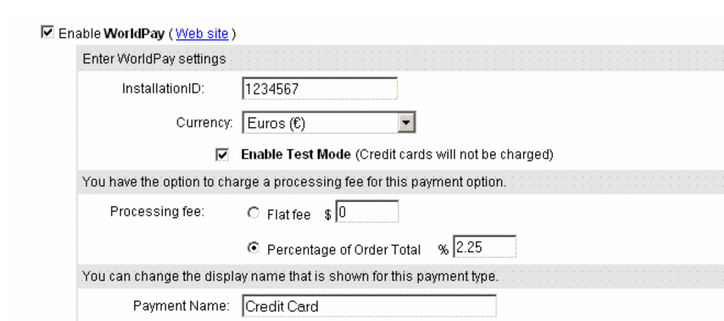
To configure WorldPay as your payment gateway, you will need to log into the WorldPay Administration Server located at https://select.worldpay.com/wcc/admin. Then, at the bottom-right corner of the page, select "Configuration Options". Follow the instructions below to properly configure the system. Note the following entries:

- Description: Enter any value here (e.g. Store order).

- Customer description: Same as above.
- Merchant's shop URL: http://www.yourStore.com/ProductCart/pc/
- Callback URL: http://www.yourStore.com/ProductCart/pc/wp_insert.asp
- Callback enabled: checked
- Callback suspended: checked
- All others remain unchecked

Save the configuration options, then go back to your ProductCart Control Panel to complete the configuration:

- Check the Enable WorldPay option.
- Enter the Installation ID that was provided to you when you setup your WorldPay account.
- Select your store's default currency. One nice feature about WorldPay is that customers will actually be able to change the currency the order will be processed in once they get to the payment details page. For example, a European customer shopping on an American online store could change the currency from US $ to Euro on the payment details page, using the *Choose Currency* drop-down menu. The order total is automatically converted in all the currencies supported by the system.
- Enable Test Mode: You can set WorldPay to run in Test Mode. When you do, all transactions will be approved and the credit card will not be charged.
- Processing Fee. You can choose whether to charge an additional transaction fee using the *Processing Fee* field. The fee can be either a flat charge or a percentage of the total order amount.
- Payment Name. You can change the description that is shown to your customers during checkout. For example, you could change "Credit Card" to "Visa and MasterCard". To complete the activation, submit the form by clicking the *Add* button.



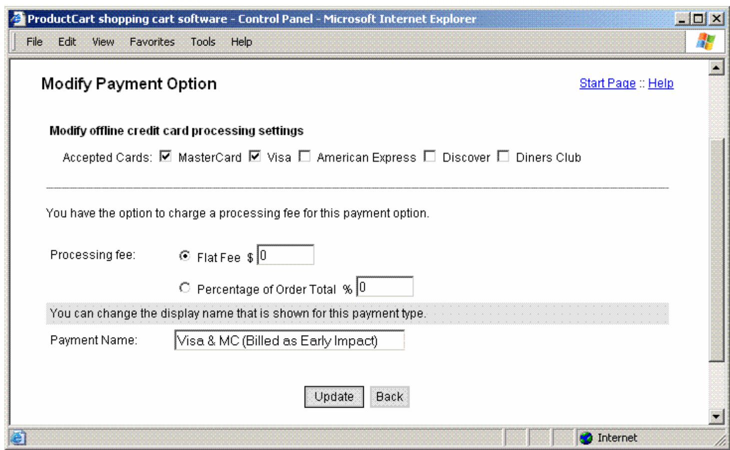
YourPay

YourPay is powered by LinkPoint. Please review the LinkPoint Connect section of the User Guide for setup information. When you activate LinkPoint, remember to check the option *I am using YourPay - Powered by LinkPoint.*

Configuring Offline Credit Card Processing

Common to all non real-time payment options is the fact that no money is exchanged at the time the order is processed. You will collect the money at a later point: COD, or Net 30, or by processing a credit card offline

To add offline credit card processing to your store, select *Add New Option* from the *Payment Options* menu, and then click on *Offline credit cards, check, Net 30, etc.*



Because there is no gateway involved, setting up a non real-time payment option is easy. To configure offline credit card processing, simply check which credit cards you support, and click on the *Add* button.

ProductCart v2.61 and above no longer gives you the option to require customers to enter their card's CVV code, the 3- or 4-digit security code that is typically located on the back of the credit card, after the first 16 digits (or on the front of American Express credit cards, above the credit card number). This is because new regulations specifically prohibit merchants from saving the security code to any storage media. Therefore, the code that used to save that information to the ProductCart database was removed, as well as the ability for you as a merchant to show the field on the payment page.

When accepting offline credit card transactions, you have the option to charge either a flat processing charge, or a transaction fee that is a percentage of the total order amount.

Finally, use the *Payment Name* field to change the description that is shown to your customers during checkout. For example, you could change "Credit Card" to "Visa and MasterCard".

When customers check out, credit card information will be collected, but the card will not be charged. To avoid orders submitted with false credit card information, ProductCart performs basic validation on the credit card number before allowing the order to go through. If the number is incorrect, customers will receive an error message. If the number is a valid credit card number, then the order will go through. ProductCart does not perform any address verification, or any other type of validation. If you receive a large number of orders and need them to be more effectively validated before they are submitted, you will have to set up an account with one of the payment gateways mentioned earlier in this chapter.

ProductCart will send you an "Order Received" e-mail once the order has been placed (and an order confirmation message after it has been processed, i.e. after you have processed the payment and updated the order status using the Control Panel). It will then be up to you to charge the credit card offline, using a POS terminal, software that may be installed on your PC, or any other solution that you may be using. For security reasons, credit card information will not be included in the order confirmation e-mail. To retrieve such information, you will have to use the *Manage Orders* component of the ProductCart Control Panel. See the *Managing Your Orders* section of this document for more information.

> **Note**: All credit card information collected from your customers during non real-time credit card transactions is stored in the system database in an encrypted format to ensure data security. For additional security, ProductCart allows you to purge credit card information from the database. You should routinely perform this task on orders that have been processed and for which credit card information is no longer needed.

Custom Cards: Debit Cards, Store Cards, etc.

ProductCart also features support for custom payment methods that require you to collect multiple pieces of information from the customer. This feature is useful to stores that offer credit card-like payment options, such as debit cards, store cards, and similar payment systems. In this document we will refer to these payment methods as *Custom Cards*.

For example, your store may offer a store card for which you need to collect the following information:

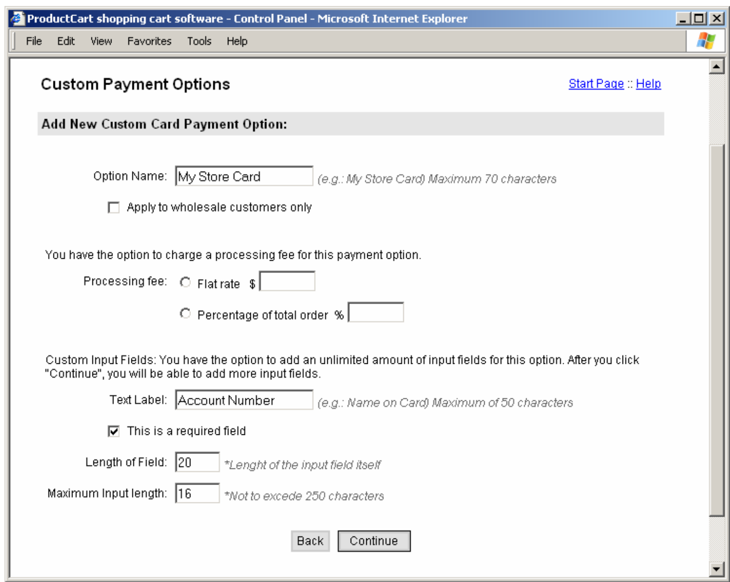
- Account Number
- Issued On
- Valid Until
- Cardholder Name

ProductCart does not perform any validation on any of the information submitted by the customer, other than checking to see whether a required field was filled out or not. However, this feature can help you elegantly collect payment information that would be otherwise hard to obtain from the customer during the checkout process. It is then up to you to check the validity of the submitted payment details before processing the order.

To add a custom card to your store, select *Add New Option* from the *Payment Options* menu, and then click on *Debit cards, store cards, etc.*

- Option Name. Enter the name for this custom card.
- Check whether this payment option should apply to wholesale customers only
- Processing Fee. Choose whether to charge an additional transaction fee using the *Processing Fee* field. The fee can be either a flat charge or a percentage of the total order amount.

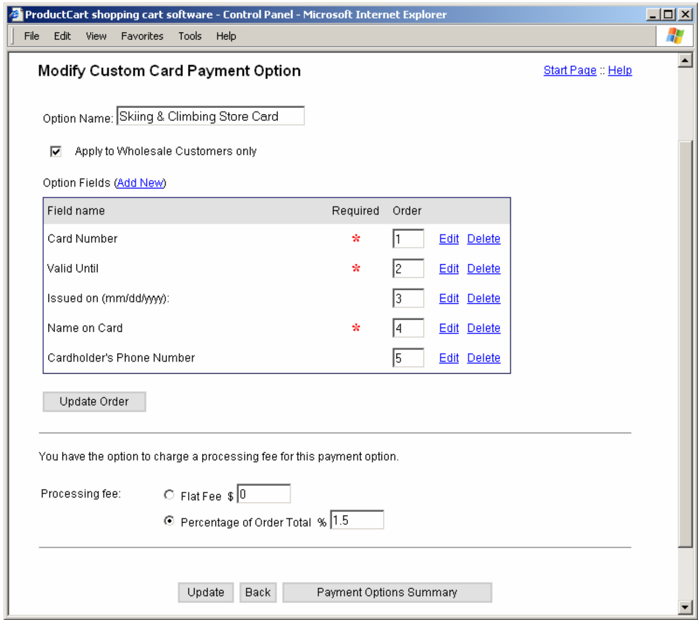
- Add the first input field that will be displayed on the payment details page (e.g. Account Number). You will be able to add additional fields once you click on the *Continue* button. For each input field, you can specify the following:
  - A description for the field under Text Label (maximum 50 characters).
  - Whether or not they field is required.
  - The length of the field.
  - The maximum amount of characters that the field will accept. For example, if you are creating the field "Account Number" and you know all account numbers for this custom card are made of 12 digits, you could enter "12" here.



Click on the *Continue* button to save the information to the store database, and add new input fields, if necessary. You can add unlimited input fields to a custom card. For each input field you can configure the properties mentioned above, and edit or delete a field at any time by clicking on the *Edit* or the *Delete* links respectively. Make sure not to delete custom card fields that have been used in previous orders, as this will affect the payment details for those orders.

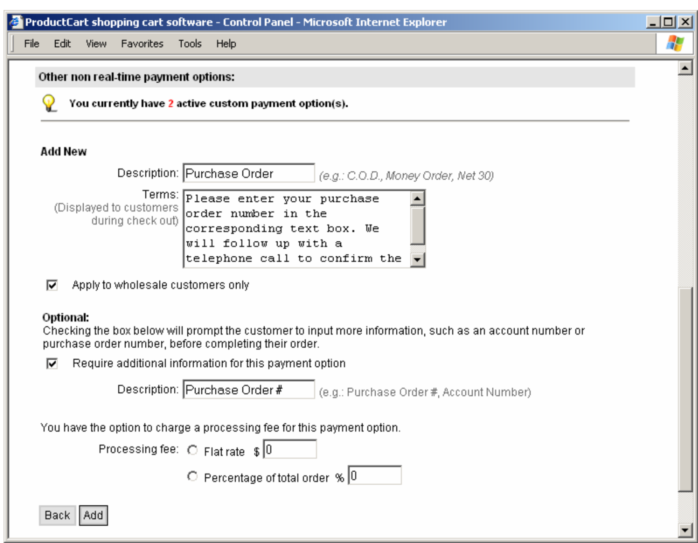
Remember that ProductCart does not perform any validation on the format of the information submitted through the field, other than verifying that a required field has been filled out, and that the maximum number of characters for the field has not been exceeded.

Once you are done adding input fields to this custom card, you can set the order in which they will be displayed on the payment details page. To do so, enter a number in the order field, and then click on the *Update Order* button.



Other Non Real-Time Payment Options

You can offer your customers other non real-time or offline payment options, such as payment terms for wholesale customers. To add a custom payment option to your store, select *Add New Option* from the *Payment Options* menu, and then click on *Offline credit cards, check, Net 30, etc.* The top part of the page includes settings for offline credit card processing. Scroll to the lower part of the window to configure a new, offline payment option, as shown in the image below..



To add a new offline payment option, fill out the information as follows:

- Description. Enter a description (e.g. Net 30, Purchase Order, Check, etc.)

- Terms. Describe the payment terms or other instructions that you want to display on the payment details page.
- Apply to wholesale customers only. Check this option if you would like this payment method to be available to wholesale customers only. For example, you will typically not want to give payment terms to your retail customers (first time visitors to your store are by default retail customers). So if "Net 30" is one of the payment methods that you would like to offer to wholesale customers only, check the box "Apply to wholesale customers only". Retail customers will not see it when selecting a payment option during check out.

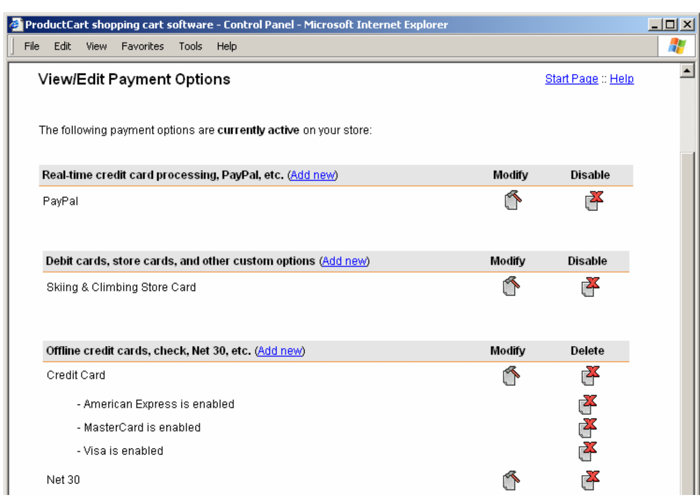
  For more information about the difference between retail and wholesale customers, and to learn how to change a customer's status, see the *Manage Customers* section of this document.
- Require additional information for this payment option. Check this option, and enter a description in the field right below it, if you would like to collect additional information when customers place an order using this payment method. For example, you may want to obtain a purchase order number from wholesale customers that buy products on terms. If you check this option and label it "Purchase Order Number", wholesale customers will be asked to enter that information during the check out process.
- Processing Fee. As always, you can choose whether to charge an additional transaction fee using the *Processing Fee* field. The fee can be either a flat charge or a percentage of the total order amount.

Click on the *Add* button to add this new payment option to the store.

Modifying a Payment Option

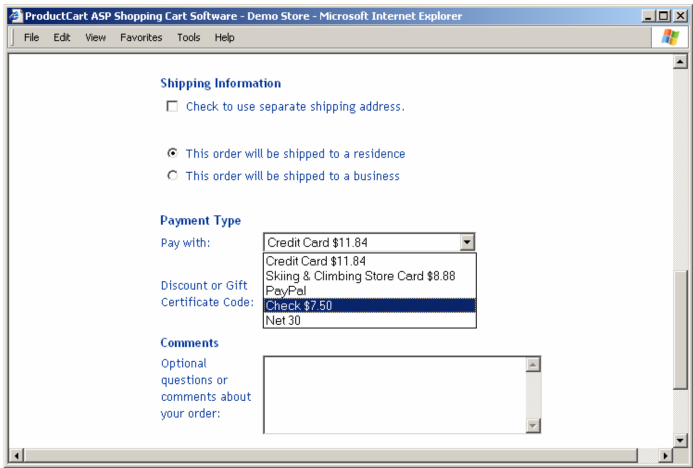
To modify an existing payment option select *View/Modify Options* from the *Payment Options* menu. You will be shown a list of the payment options that are currently active. Click on the *Modify* button to edit an option. Click on the *Disable* icon to disable a payment option that is currently active. Note that offline payment options will be deleted, not just disabled.

If you disable a real-time payment gateway, you can enable it again at any time.

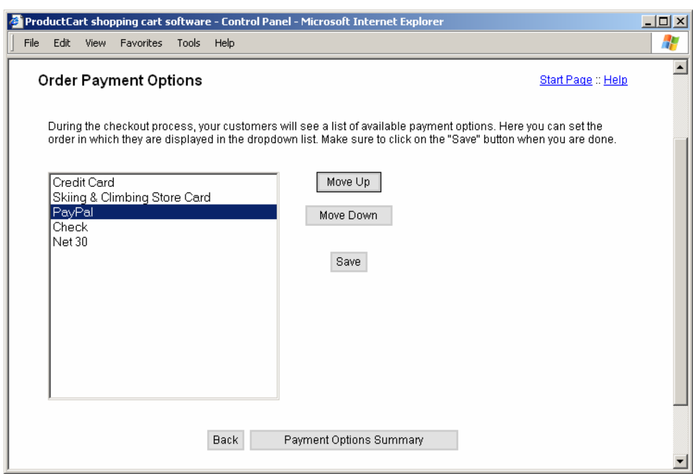


Ordering Payment Options

During the checkout process, customers select a payment option by choosing one of the options that you have made available to them in your store. Payment options are displayed in a drop-down menu on the first step of the checkout process, in the *Payment Type* section of the page. Note that wholesale customers will be shown all payment options, whereas retail customer will not see payment options that have been set up to be wholesale-only. Payment options are displayed together with any payment fee that has been associated with it.



You can set the order in which payment options are listed in the drop-down menu shown above by selecting *Set Display Order* from the *Payment Options* menu. Use the *Move Up* and *Move Down* buttons to set the preferred order. When you are done, click on the *Save* button to confirm your selection. You can change the order at any time.



Orders with a 0 Amount

It can happen that an order's total is zero. Specifically, if the product is free, there is no shipping involved, and no taxes, then the order total is zero. This can be the result of a free product (product's price is zero), or the application of a discount that renders the product's price equal to zero.

When a discount is applied to an order, reducing the product's price to zero:

- If the product does not require shipping, then shipping charges are zero.
- If the product requires shipping, shipping charges and handling fees are added to the order total, regardless of the product's price, and therefore the order's total is higher than zero.

When the order's total is zero, payment options are not shown to the customer, regardless of your store's payment settings. The customer will be able to complete the checkout process and submit the order without going through the payment step.

Chapter

8

Tax Options

In the United States, taxation of online sales is typically handled as follows: orders submitted by customers that reside in the same state where the company managing the online store is located are taxed; orders submitted by out-of-state customers are not taxed (this includes international customers). ProductCart also supports country-based taxation for international stores. Canadian stores can now display federal and local taxes separately (other stores in other countries that require this, can do so as well, of course). Independently of the tax settings configured using the *Tax Option* module, you can set a product or service as tax-exempt when adding or modifying a product.

The tax calculation features provided by ProductCart are designed to help you calculate sale taxes. However, the calculation performed by the software may or may not exactly match the tax laws that you need to comply with. You should consult your local tax authority to determine the tax laws that you need to adhere to.

ProductCart gives you the ability to either use a database file containing tax rates, or enter rates manually by location and/or by product.

Using a Tax Data File

This section applies mostly to US merchants, although you can use this feature of ProductCart outside of the US too if you can apply tax rates based on the customer's postal code.

Overview

Are you liable to collect sales tax on your Internet store, and for which states? Most online sellers collect tax only in the state(s) where they have a nexus, or physical presence. The definition of nexus varies from state to state, but can include employees, agents, telecommuters, premises, personal property, or even web servers. Check with your CPA or the state directly to determine if your company has a nexus in that state.

Sales tax can be at local levels beyond just the state rate. These local rates can include the county, city, special purpose district (SPD), and metropolitan transit area (MTA). Keeping track of these rates and rate changes is essential to ensure that you are charging the correct sales tax rate for your online transactions.

Early Impact recently partnered with Tax Data Systems to allow US-based users of ProductCart to quickly, easily and accurately calculate sales tax on orders placed on their store.

If would like to use a tax data file to calculate taxes in ProductCart, but elect not to use Tax Data Systems' services, you can manually create a tax data file. Please refer to Appendix O of this User Guide for details on the file format that you will need to adhere to.

Tax Data Systems provides inexpensive subscription services to complete and updated data files that contain all the information that is needed to properly calculate sales taxes. The company sends regular updates to its customers to keep them up-to-date with the latest tax changes.

ProductCart v2.7 and above contain a sophisticated tax module that takes advantage of Tax Data Systems' data files to allow your store to effectively perform the following tax-related tasks:

- Properly calculate sales tax, based on the tax rate associated with the customer's shipping address.
- Correctly handle scenarios in which a ZIP code includes multiple city/county combinations and therefore multiple tax rates are associated with it. The customer will automatically be prompted to select the county/city combination that they reside in.
- Automatically determine whether shipping charges should be added to the taxable total.
- Automatically determine whether handling fees should be added to the taxable total.

Do you need a tax data file?

If your company has a physical presence in one or more US states, and if any of those states are listed in the table shown below, then local tax rates are used, and the answer to the question of whether you should use a tax data file is "yes". If your state is not listed, then it means that either there is no sales tax in your state, or a uniform tax rate is applied across the state.

Contact your local tax authority for more information on how sales taxes should be calculated in your state (and in all other states in which your company has a physical presence). Below is a list of the states that collect local taxes.

Abbrev	State
AL	Alabama
AK	Alaska
AZ	Arizona
AR	Arkansas
CA	California
CO	Colorado
FL	Florida
GA	Georgia
ID	Idaho
IL	Illinois
IA	Iowa
KS	Kansas
LA	Louisiana
MN	Minnesota
MS	Mississippi
MO	Missouri
NE	Nebraska

NV	Nevada
NM	New Mexico
NY	New York
NC	North Carolina
ND	North Dakota
OH	Ohio
OK	Oklahoma
PA	Pennsylvania
SC	South Carolina
SD	South Dakota
TN	Tennessee
TX	Texas
Note about Texas: if you are shipping orders from Texas, you do NOT need a tax file as taxes are calculated based on the shipper's location (so only one tax rate is needed). If you are shipping orders to Texas from outside of Texas, and your company has a physical presence in Texas, then you need a tax file as taxes are calculated based on the customer's shipping address.	
UT	Utah
VA	Virginia
WA	Washington
WI	Wisconsin
WY	Wyoming

Obtaining a tax data file from Tax Data Systems

Once you have determined in which states your company has a physical presence and which of those states require the company to pay sales taxes, contact Tax Data Systems to purchase a subscription service to tax data files for those states. In most cases, you will probably need just one tax data file for the state in which your company resides.

As a ProductCart customer, you are eligible to a special discount on Tax Data Systems' subscription services. For more information and to purchase one or more tax data files, please visit: http://www.earlyimpact.com/productcart/support/updates/taxlink.asp

Once you have obtained the data file from Tax Data Systems, you can return to ProductCart and finish setting up the tax settings. If you purchased more than one file, carefully review the next section.

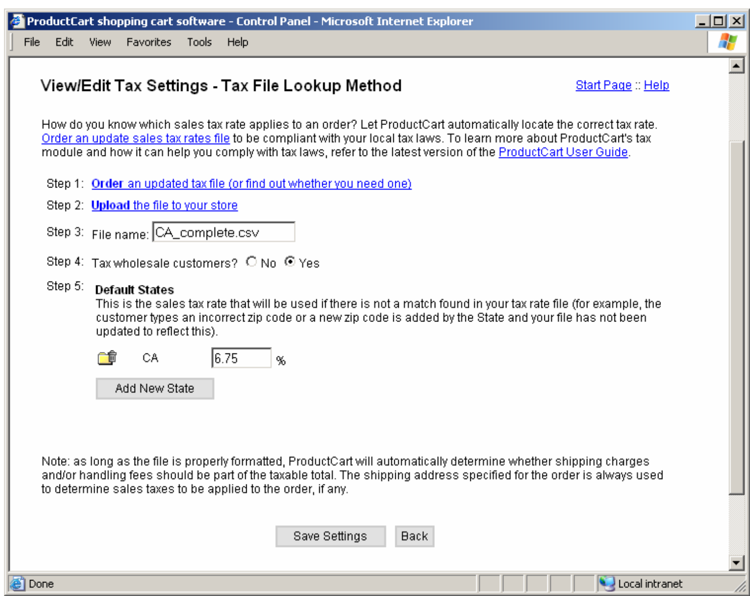
Combining more than one data files

You can only use one data file at a time in ProductCart. This means that if you purchase two or more data files (two or more states) from Tax Data Systems (e.g. your company has an office in California and one in New York), you will need to combine them into one and upload the combined file to ProductCart.

Use the following procedure to combine two or more CSV files into one:

- Open the first file with Microsoft Notepad

- Select all data except the first row. The first row is the one that ends with "TAX_SHIPPING_AND_HANDLING_TOGETHER". The second row starts with a ZIP code.
- Select *Edit/Copy*.
- Open the 2nd file with Microsoft Notepad.
- Go to the very bottom of the file. Press the *Enter* key on your keyboard to create a new row, then place the mouse cursor then. This new row should be the very last row of the Notepad file. To ensure that this is the case, click the *Delete* key on your keyboard until this is the last row of the file.
- Select *Edit/Paste*. The data copied from the first file will be pasted into the second file.
- Select *File/Save*. Make sure to save the new file using the *.csv extension. For example, you could save this new file as *mytaxFile.csv*. Make sure the file name does not contain any spaces.
- Proceed to the next section, which contains information on how to upload your tax data file to ProductCart.



Configuring ProductCart's Tax Module

Log into your ProductCart Control Panel and select *Store Management Tools > Tax Options > View/Edit Tax Options*. From the screen that is shown to you, select the option to use a tax file.

Now, take the following steps:

1. Upload the data file received from Tax Data Systems to your store using the built-in upload feature. To do so, click on the text link *Upload the file to your store*, locate the file on your computer using the *Browse* button, then click on *Upload*.

   Your file will be automatically uploaded to the "productcart/pc/tax" folder on your Web server. If you receive an error during the upload procedure, it is likely that the "pc/tax" folder does not have "write" permissions. Please refer to Chapter 2 of this User Guide for information on how to properly set folder permissions for your ProductCart store. Of course, you can also upload the file to your server using an FTP program.

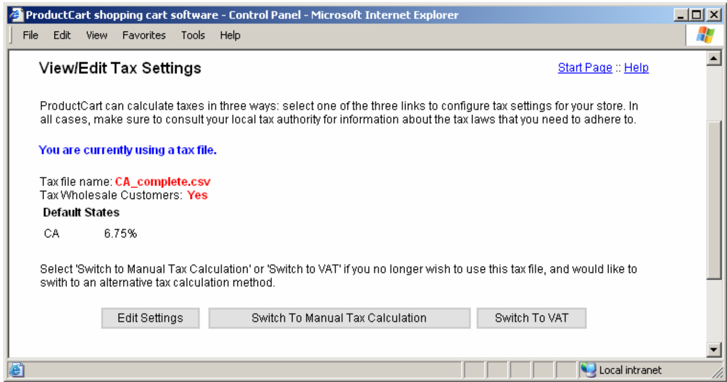
If and when you receive an updated tax data file from Tax Data Systems, simply upload the file to your store. You will not need to change any of the other settings as the file will likely carry the same file name. If the file name has changed, make sure to enter the correct one as indicated in *Step 2*.

2. Enter the name of the file that you just uploaded to the store in the corresponding input field. For example, the naming convention of the tax files is the state abbreviation underscore complete.csv (e.g. "CA_complete.csv"). Make sure to include the ".csv" extension when you enter the file name in the corresponding field. If you enter a name that does not match that of the file that you uploaded to the store, you will receive an error message during checkout.
3. Select whether wholesale customers should be taxed or not on your store.
4. Enter one or more default states and specify a tax rate for all of them. The default sales tax rate is the sales tax rate that will be used if a match for the customer's shipping address is not found in your tax rate file (for example, the customer types an incorrect zip code or a new zip code is added by the State and your file has not been updated to reflect this).

   If your company resides in California and you only have a physical presence in California, then the tax data file that you uploaded to your store will likely only contain tax rates for California, and your default state is only California. If you collect sales taxes for more than one state, enter them as default states.
5. Place an order in your storefront to ensure that taxes are properly calculated. ProductCart will look at the ZIP code of the customer's shipping address match it to a tax rate in the data file that you have uploaded. If there is no match, and if the state entered for the shipping address is not one of the default states listed in the tax settings, ProductCart will assume that the order does not need to be taxed. If there is more than one match, ProductCart will prompt the user to select the city/county in which they live in.

Note that as long as the file is properly formatted, ProductCart will automatically determine whether shipping charges and/or handling fees should be part of the taxable total.

Also note that the shipping address specified for the order is always used to determine sales taxes to be applied to the order, if any. The shipping address is the customer's billing address unless the customer specifies a separate *Ship To* address during checkout.



Once you have setup the tax calculation to use a database, ProductCart shows you a summary of such settings every time you click on *View/Edit Tax Options* from the *Tax Options* menu. At that point you can either keep the settings as is, edit them (e.g. change the default tax rate), or switch to alternative ways to compute taxes, which are described in the next sections.

Troubleshooting problems related to using a tax file

If you are receiving an error when placing a test order, and the error occurs during the checkout process, after the shipping selection page and before the order verification page are shown, and/or the error details shown by your browser include the file name *tax.asp*, please check on the following before contacting us for technical support:

- Make sure that you have uploaded a tax data file to the pc/tax folder.
- Make sure the file has a ".csv" extension (e.g. myTaxFile.csv).
- Make sure that the file name specified in the Tax Settings area of the Control Panel matches the name of the file uploaded to the pc/tax folder. Also confirm that the file name does not contain any spaces or special characters. If it does, change the file both in the folder itself using an FTP program, and in the Control Panel.
- If you combined two or more files together, review the instructions listed earlier in this document. Specifically, make sure that you did NOT include the header of the first file when you copied it into the second file.

If your problem is not solved by one of the items listed above, please note:

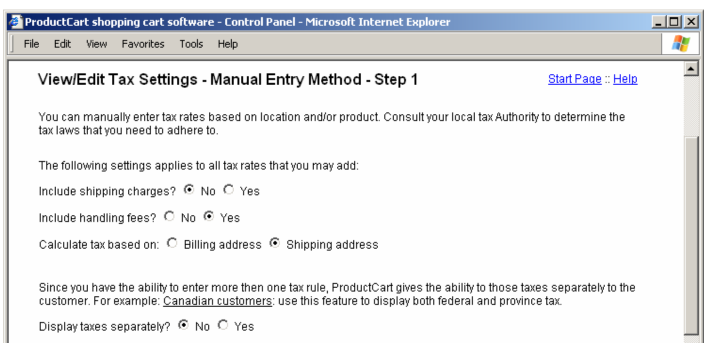
- If are having an issue with the tax data file itself, please contact Tax Data Systems.
- If you are having problems configuring your tax settings within ProductCart, please first review the corresponding chapter in the ProductCart User Guide. If you don't find an answer there, visit the ProductCart Support Center for more information, to search an updated knowledge base, and to submit a support request.
- If you purchased ProductCart from an Early Impact reseller, please contact the reseller for technical support as they may have made modifications to ProductCart for you.

Manually Adding a Tax Rate

When you cannot or do not want to use a tax database to calculate taxes on your orders, ProductCart allows you to manually enter tax rates and charge taxes based on the customer's location (but not necessarily his or her postal code) and/or products.

To enter tax rates by product or by location, click on *Enter tax rates manually* on the *Tax Options* window. If you are using a Tax Database, click on *Switch to Manual Tax Calculation*. Next, configure the following settings:

- Include shipping charges. You can include shipping charges and/or handling fees in the calculation. As mentioned above, typically shipping charges are excluded, but handling fees are taxable.
- Include handling fees. See above.
- Base the calculation on the billing vs. shipping address. Typically, the shipping address is the one that should determine which tax rate should be applied, if any.
- Display taxes separately. Since you have the ability to enter more then one tax rule, now ProductCart gives the option to display those taxes separately to the customer. For example, Canadian customers can use this feature to separately display federal and province tax.

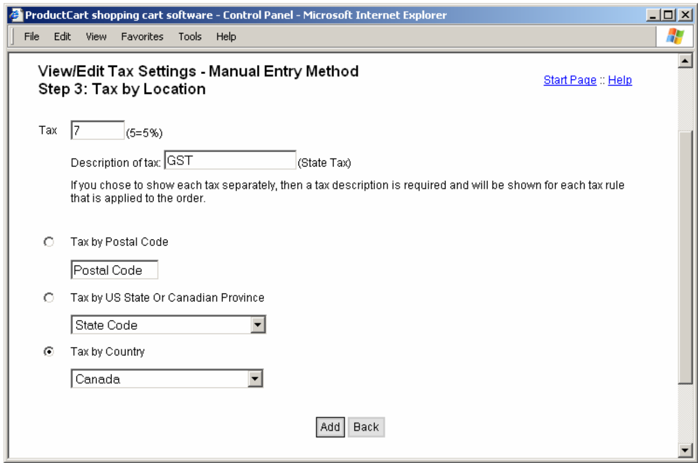


When you are done, click on the *Update & Continue* button.

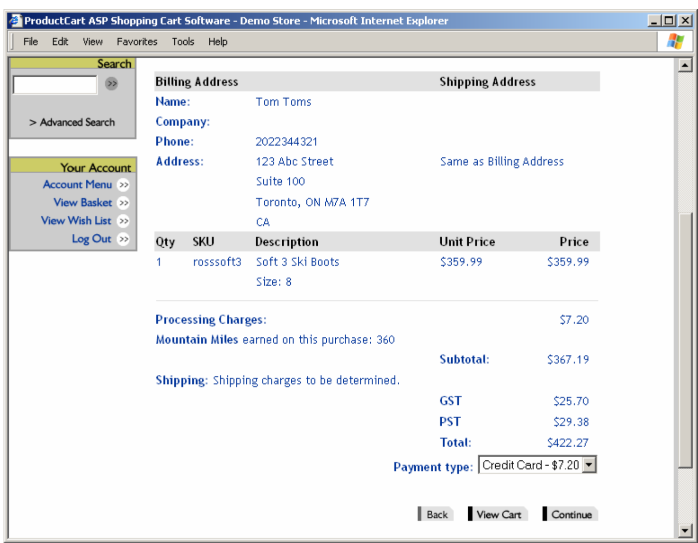
The next screen asks you to choose whether you would like to add a tax rule based on product or location, and it also provides a link to view existing tax rules. Let's review the different options.

- **Add tax by location**. To add a tax rule that applies taxes to an order based on the location where the customer resides, click on *Add tax by location*, set the tax rate (to add a 6.5% tax rate, simply enter 6.5), and define the geographic limitation by selecting a postal code, a US state or a country. You can have multiple tax rates working at the same time. Use the description field to enter a label for this tax (useful when taxes are displayed separately). For example, a Canadian store would enter the following to add the Federal portion of the tax:
    - Rate: 7%
    - Description: GST
    - Country: Canada

Then the same store would repeat the same step multiple times to assign local taxes to the various provinces (PST).

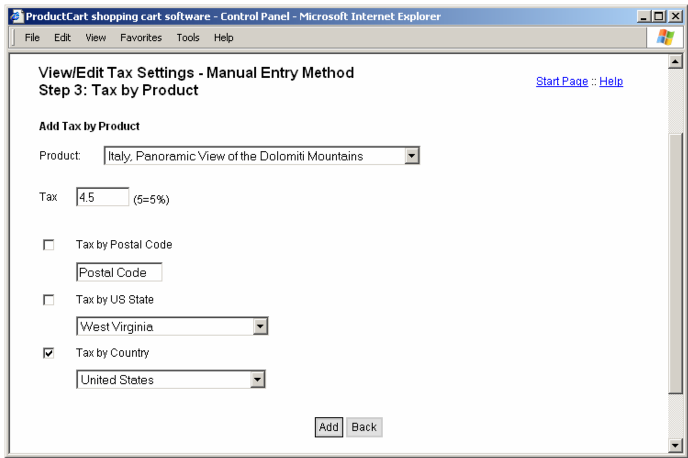


Here in an example of how the order verification page (*pc/orderVerify.asp*) displays tax details to customers when the store has been setup to show taxes separately. In this case, a Canadian customer from the province of Ontario is charged both federal and local taxes (GST and PST respectively).



- **Add tax by product**. To add a tax rule that applies taxes to an order based on the shopping cart content, click on *Add tax by product*, select a product from the drop-down menu, set the tax rate (to add a 6.5% tax rate, simply enter 6.5), and define a geographic limitation by selecting a postal code, a US state or a country. You can have multiple tax rates working at the same time, so that you may cover all products that fall into a certain product category, for example.

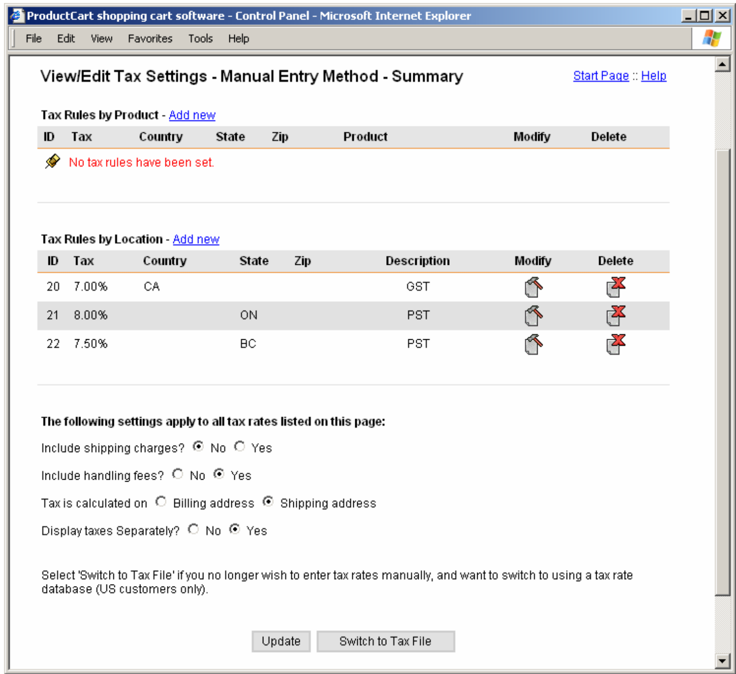
  Note that ProductCart does not apply the *Tax by location* on a product for which a *Tax by* *product* has been entered, thus avoiding double taxation. In other words, when the shopping cart contains a combination of products for which a tax has been specified, and products for which it has not, ProductCart first applies the tax by product, then applies the tax by location (if any) on the rest of the products, unless they are tax-exempt. The tax added to the order is the sum of all taxes calculated on the shopping cart content.



- **List all tax rules**. To display a list of all tax rules currently active in your store, select *List all tax rules*. To modify any of them, click on the *Modify* button. To delete a tax rule, click on the *Delete* button. To add a new tax rule, click on *Add New*.

  The bottom part of the window allows you to reset the general rules described at the beginning of this section. To update these options, click on the *Update* button.

  To switch to calculating taxes using a tax file, click on *Switch to Tax file*. To switch to using VAT, click on *Switch to VAT*.



Calculating the Value Added Tax (VAT)

ProductCart v2.7 and above allow you to show your customers the VAT (Value Added Tax) on the products that they are purchasing (product details page) and on the order total (order details page). The system behaves based on the following assumptions:

- When you enter prices in ProductCart, they are always entered VAT included. When you add a product to your store, the product's price includes VAT. The system gives you the option to show the price without VAT on the product details page.
- The same VAT is applied to all products sold on the store.

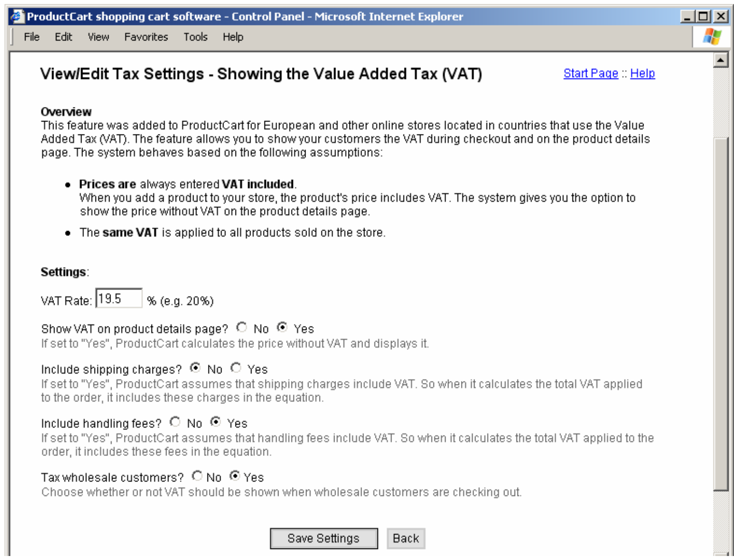
You can configure the following settings:

- VAT Rate (e.g. 20%)
- Whether VAT should be shown on the product details page. If set to "Yes", ProductCart calculates the price without VAT and displays it below the online price. Here is an example of how the price would be shown for a hypothetical product:

  Price: £26.00 Price inc. VAT
  Price without VAT: £21.76
  List Price: ~~£29.96~~ - You Save: £3.96

- Whether to include shipping charges in the calculation. If set to "Yes", ProductCart assumes that shipping charges include VAT. So when it calculates the total VAT applied to the order, it includes these charges in the equation.

- Whether to include handling fees. If set to "Yes", ProductCart assumes that handling fees include VAT. So when it calculates the total VAT applied to the order, it includes these fees in the equation.
- Whether wholesale customers should be taxed. You can choose whether or not VAT should be shown when wholesale customers are checking out.



Setting a Product as Tax-Exempt

In many countries there are products and services on which taxes are not applied. In the United States, for example, you are not required to charge taxes if you are selling services (e.g. a legal consultation, graphic design services, etc.). You are also typically not required to pay sales taxes on products that are delivered electronically to your customers, as long as no physical product (e.g. a CD, a manual, etc.) is shipped to the customer.

ProductCart allows you to set individual products as tax-exempt. This way you can configure general tax settings for your store, and then exclude from them products and services on which taxes should not be calculated.

You can set a product as non-taxable both when adding a new product and when modifying a product. In both cases, notice the *Non-Taxable* check box locate in the *Other Settings* section of the page. Check this option to make a product non-taxable, then save the product information to the database.

If an order contains both taxable and non-taxable items, taxes will be calculated on the subtotal for the taxable products.

Chapter

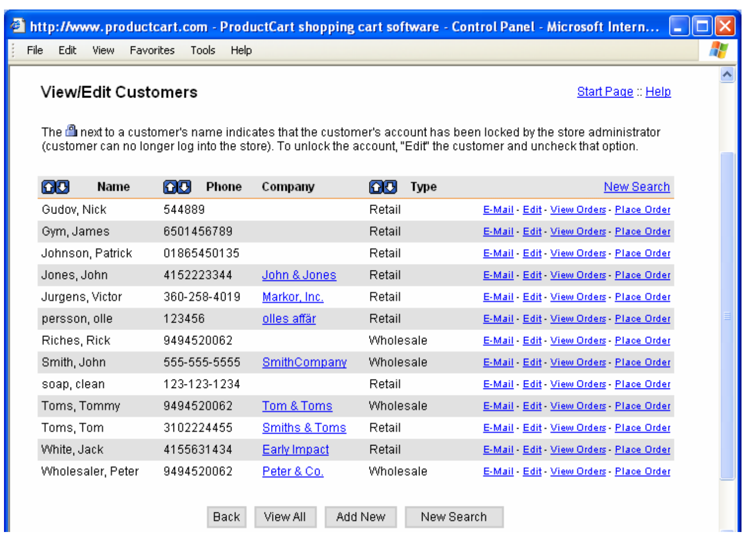
9

Managing Customers

This section of the Control Panel gives you access to customer information. It allows you to view and edit customer accounts, change the customer type from *retail* to *wholesale* (which affects how much they are charged when they order products from your store), e-mail a customer, add a new customer to the database, view orders placed by a customer, and more. This is also the area where you will find the Newsletter Wizard, a feature that makes it easy to send targeted e-mail messages to filtered customer lists.

Viewing Customer Information

To locate a specific customer, you can search using the customer name or company name, or you can browse all registered customers by clicking on *View All*. A list of customers matching your search criteria will be shown: you can then sort them by last name, phone number or customer type (wholesale vs. retail customers).



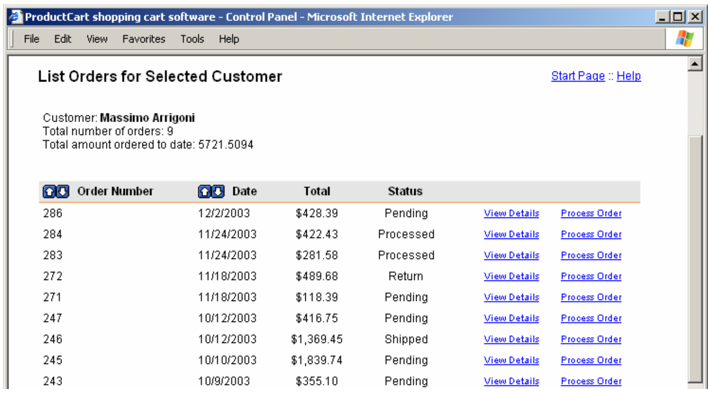
When you find the customer you were looking for, click on the *Edit* button to view the customer profile. You can use this page to:

- Lock the customer account: the customer will remain in the database, but he/she will no longer be able to log in and/or place orders.

- Suspend the account: the customer can log into the account and browse the catalog, but not place an order. The difference between locking and suspending an account is that in the first scenario the customer can no longer log in (e.g. to view previous orders, etc.).
- Change the customer type from *retail* to *wholesale* (or vice versa). For a list of differences between retail and wholesale customers, please refer to the corresponding section later in this chapter.
- Edit the customer's billing address and default shipping address (if any).
- Subscribe or unsubscribe the customer to the list of customers that opted to receive news from you (if the feature has been turned on).
- View/update the customer's accrued Reward Points.
- Place an order on behalf of the customer. When you click on this button, ProductCart will load a new browser window and automatically log you into the customer account so that you can place an order on behalf of the customer.
- Consolidate Account: this feature allows you to consolidate orders from multiple customer accounts so that they all appear under the same account. For example, the same customer might have registered more than once with your store. To properly keep track of his or her orders, it might make sense to consolidate under one account all of the orders placed by same customer.
    - Ask the customer which account they prefer to use, and then locate any of the accounts that they do not wish to maintain. When you load the customer details page for one of those accounts, click on the *Consolidate Account* button. A search page will be displayed.
    - Look for the customer account to which you would like to reassign the orders now listed under the current account.
    - Click on *Move Order to Selected Account* to complete the task. A confirmation page will confirm that the two accounts have been consolidated successfully.
    - At this point you can delete from the customer database the customer accounts that no longer have orders assigned to them.
- Delete the customer. When you click on the *Delete* button, the following occurs:
    - If there ARE NO orders associated with the selected customer, the customer account is permanently deleted from the database. If the customer had initiated, but not completed one or more orders (i.e. incomplete orders), they are also deleted.
    - If there ARE orders associated with the selected customer, you will be prompted to either Remove the customer account, but keep the associated orders in the database, OR Delete the customer account and all of the associated orders from the database.

  When a customer is deleted from the database, ProductCart will also delete all Wish List entries made by the customer and all the credit card information submitted by the customer (if the store is using offline credit card processing).

On the customer search results page, click on the *Place Order* link to be automatically logged into the storefront as the selected customer. You can use this feature to place orders on behalf of one of your customers. Click on *View Orders* link to view all orders placed by a customer. By default, orders are sorted by date, with the latest order shown first. Click on the arrow at the top of the page to change the order in which records are shown. The order number, total order amount, order date, and the current order status are shown. Click on *View Details* to view a printer-friendly version of the order. Select *Process Order* to connect to the *Order Management* area of the Control Panel, which is discussed in Chapter 11. Refer to that chapter for detailed information about how to process an order, and to understand "order status" and its implications.



Retail vs. Wholesale Customers

As mentioned in other areas of this document, ProductCart supports two customer types: *retail* and *wholesale*. The customer details page within the *Managing Customers* section of the Control Panel allows you change the customer type from *Retail*, which is the default setting, to *Wholesale*. There are many features in your Web store that work differently depending on the customer type. Here is a list of them:

- Store settings. You can set your entire store to work as a catalog, without ecommerce, when retail customers browse the storefront, reserving the ability to purchase a product only to wholesale customers. You can also set a different minimum order amount for wholesale customers.
- Product pricing. Retail customers are shown and charged the *online price*. Wholesale customers are shown and charged the *wholesale price*. You define the two prices when you add or modify a product to your store. If you are adding a Build To Order product, you can specify a different base price for retail vs. wholesale customers.
- Option pricing. When options alter a product's online price by adding or removing an amount, the retail option price is used for retails customers, and the wholesale option price is used for wholesale customers. When the wholesale option price has not been defined, the retail option price is used instead. For example, if a "Wood Frame" added $10 to the price of a poster purchased by a retail customer, wholesale customers would also be charged $10 when purchasing the same product, unless a wholesale price had been specified for that option attribute.
- Build To Order configurations. When you assign products and/or Build To Order Items to a BTO product, you have the option of specifying a different price for wholesale customers. If you don't, the price specified for retail customers will be used.

- Quantity discounts can be different for wholesale customers. These are the price breaks that you may offer to customers that order large quantities of a certain product. To configure quantity discounts, select *Discount by Quantity* from the *Specials/Discounts* menu.
- Payment options can be set differently for wholesale customers. This feature, for instance, allows you to grant wholesale customers special payment terms (such as Net 30) that retail customers do not receive. To configure payment terms and assign them to wholesale customers only, select *Add New Option* from the *Payment Options* menu, and then add a *Non Real-Time Payment Option*. When you add the new option, make sure to check the box: *Apply to wholesale customers only*.
- Taxes are not calculated when an order is placed by a wholesale customer. This is because wholesale customers are typically resellers, and therefore charge sales taxes to their customers.

ProductCart only supports two pricing levels: retail and wholesale. However, by using unique *Discounts by Code* you can create different pricing levels among your wholesale customers. Create a unique discount for each wholesale customer (or for each category of wholesale customers), then provide it to your customers by sending them an e-mail, for example. Instruct them to enter their unique discount during the checkout process, and remind them that they will not see the special pricing that has been reserved to them until they come to the order verification page, which is where ProductCart performs the discount calculation and applies it to the order. This is the page that is shown before the payment details page, after a shipping option has been chosen (if any).

This approach works well when preferred customers enjoy an additional, across-the-board discount (e.g. extra 5% off). In fact, we use it ourselves here at Early Impact. However, it will not work as well if the additional discount cannot be applied across your whole product catalog.

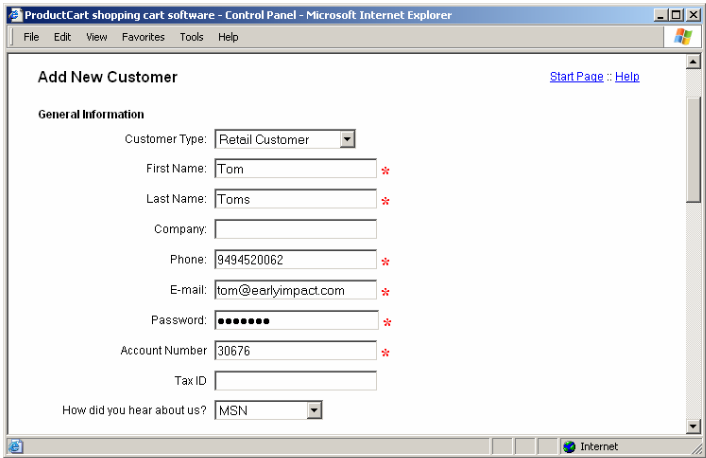
Adding a New Customer

The ability to add a new customer right from your Control Panel may be useful to you especially if you deal with resellers (wholesale customers). Indeed, you can make it easier for your resellers to use your online store by using this feature to register them in advance. You can then e-mail them their user name and password, and a link to your storefront.

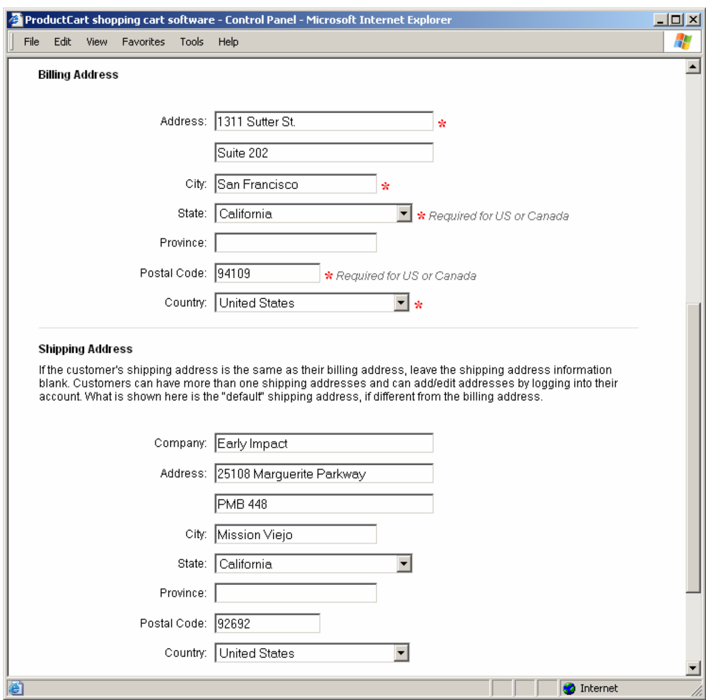
When they place an order, they will not have to register with the store, as their account has already been set up. All they will have to do is log in with the user name and password that you provided, and the appropriate contact, billing, and shipping information will already be there.

If you need to add a number of customer accounts, a faster way to do so may be to use the new *Customer Import Wizard*, which is discussed in the next section.

To add a new customer, select *Manage Customers > Add New Customer*. At the top of the page, select the customer type, and enter the customer's account details (name, phone number, etc.). If you have set up any *Checkout Options* (e.g. tax ID, referrer drop-down, etc.), they will be shown here as well. If you set them up as required fields, they will be required here too.



Next, enter the customer's billing address and a separate shipping address, if necessary. The billing address functions as the default shipping address, if none is entered. The customer has the ability to add additional shipping addresses when editing his/her account.



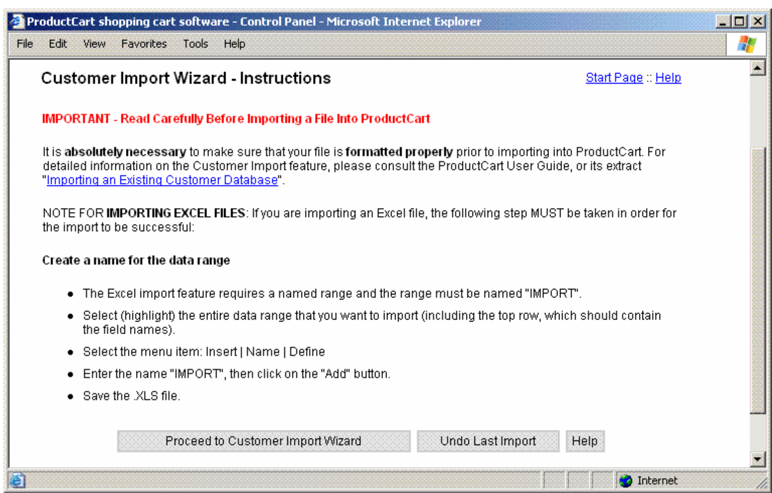
When you modify a customer and the Reward Points system is turned on, the bottom of the page shows the current Reward Points balance and the total number of points used to date for the selected customer, and gives you the ability to add/remove points to/from the account.

> **Note**: If you set up a new customer remember to provide him/her with the log-in information that you created (user name & password). The customer's e-mail address is the user name. If customers forget their password, they can easily retrieve it by using ProductCart's password-reminder feature.

Customer Import Wizard

ProductCart v2.6 and above include the ability to import customer information from an existing customer database. This feature can be useful in a variety of circumstances, and specifically in the following two scenarios:

- When moving to ProductCart from another ecommerce application. Before abandoning your existing ecommerce system, export all customer records, if the software allows you to do so. Importing existing customer information into ProductCart will help you make the move smoother and less inconvenient to your customers, who will not have to re-register with your store.
- When importing customer information from your accounting software. If you are adding an online store to your sales efforts, you can use the Customer Import Wizard to add all the customer accounts that are already in your accounting system to the online store, thus making it easy for your customers to start using the store. Their e-mail address will be used by ProductCart as their user name, and a random password will be created for them automatically during the import procedure (if a password is not already associated with customer accounts). You can then email your customers using the Newsletter Wizard to let them know that they can log into their new account at any time by using their email address. To retrieve their temporary password, they can simply use the password reminder feature.



As mentioned earlier in this User Guide when introducing the Product Import Wizard, properly preparing your customer database file prior to importing it into ProductCart can save you a lot of time (*and headaches*). Because many of the instructions are identical when importing a product database into ProductCart, in the following paragraphs we will sometimes refer to that chapter of this User Guide for more information.

You can import from the following file types:

- Microsoft Excel (*.xls)
- Comma Separated Value (*.csv)

Importing a customer database into ProductCart requires the following steps:

1. Properly formatting your file. The steps to be taken are <u>different</u> depending on whether you are planning to use a *.xls or *.csv file.
2. Uploading the file to your server. You can either use the built-in upload feature or FTP the file to the *catalog* subfolder within the *pc* folder.
3. Specifying whether you are importing new customers or updating existing customer accounts.
4. Mapping fields from the file to ProductCart's database.
5. Confirming mapped fields.
6. Performing the import.
7. Reviewing which records could not be imported and why.

ProductCart's **Import Wizard** will guide you through the process step by step, as explained later in this section. First, however, you will have to spend a little time formatting the file so that it can be seamlessly imported into ProductCart.

Formatting your file

Carefully review the requirements for each field so that you will not run into conflicts when mapping the fields. In addition, we strongly suggest that you remove columns that do not contain data, so that the file that you upload to ProductCart is smaller in size and mapping is less confusing. And you may also want to rename the column headings so that they can easily be recognized when mapping the fields.

An empty excel file with the available fields for importing is available for download from the following URL: http://www.earlyimpact.com/productcart/support/Customer_import_template.zip

Regardless of which file type you plan to use during the import, it is very important that you make sure your file is formatted properly prior to importing into ProductCart.

Preparing an Excel file for import

If you are importing an Excel file, <u>the following step MUST be taken</u> in order for the import to be successful. These steps apply even if you downloaded the template Excel file mentioned above (i.e. a date range is not already defined in that file). Create a name for the **data range**:

- The Excel import feature requires a named range and the range must be named "IMPORT".
- Select (highlight) the entire data range that you want to import (including the top row, which should contain the field names). Do this after you have added data to your spreadsheet.
- Select the menu item: *Insert > Name > Define*
- Enter the name "IMPORT" without the quotes and click on the *Add* button.
- Save the .XLS file.

The vast majority of technical support requests that we receive from users of ProductCart that are not able to successfully import an XLS file are due to improperly setting the IMPORT range. If you are experiencing problems, please review the steps outlined above to make sure that the IMPORT range has been properly defined.

Updating data within an existing store database

You can either import new customer accounts or **update/append** existing customer information. For example, if you need to update the newsletter preference (receive vs. not receive the newsletter) for all customers, you could import a file that only contains the e-mail address and the *RecvNews* field (see the next section for details about each import field).

If you wish to update/append data, select that option during the import procedure: the Import Wizard will prompt you to make a selection after you have uploaded your data file to the system.

ProductCart will use the customer's e-mail address as the account identifier and update database records whose e-mail addresses are an exact match with the data that you are importing. If the e-mail address is not an exact match, a new customer (database record) will be added. The field is not case sensitive.

Fields Description

You can import the following fields. Please carefully read the format requirements. Note how in some cases the Customer Import Wizard will automatically populate a field if left blank or not imported. In the case of the password field, ProductCart automatically generates a random password for the new customer. In all other cases, ProductCart will populate the field with the text string "NA during import", which standard for "Not available during import".

Field Name	Data Type	Required	Comments
email	Text	Yes	E-mail address. Text string (alphanumeric characters). Used as product identifier when updating data: only if e-mail is an exact match data is updated. Max characters: 150.
name	Text	Yes	If left blank, ProductCart will automatically populate the field with the string "NA during import". Field is required during checkout. Max characters: 30.
lastName	Text	Yes	If left blank, ProductCart will automatically populate the field with the string "NA during import". Field is required during checkout. Max characters: 30.
customerCompany	Text	No	Max characters: 50.
phone	Text	No	Field is required during checkout. Max characters: 20
password	Text	No	If left blank, ProductCart will automatically populate the field with a random, encrypted password. Field is required during checkout. Max characters: 100.
address	Text	No	Field is required during checkout. Max characters: 255
address2	Text	No	Max characters: 150

Field Name	Data Type	Required	Comments
city	Text	No	Field is required during checkout. Max characters: 50
stateCode	Text	No	This field is used to define the state or province for US and Canadian customers. Required during checkout only if the Country is US or Canada. Max characters: 4
state	Tex	No	This field is used to define the state or province of customers outside of US and Canada. Max characters: 50.
zip	Text	No	This field is used to define the postal code and is required during checkout if the Country is US or Canada. Max characters: 10
countryCode	Text	No	Field is required during checkout. Max characters: 4.
shippingCompany	Text	No	Max characters: 150.
shippingaddress	Text	No	Max characters: 255.
shippingAddress2	Text	No	Max characters: 150.
shippingcity	Text	No	Max characters: 50.
shippingStateCode	Text	No	Max characters: 4.
shippingZip	Text	No	Max characters: 10.
shippingCountryCode	Text	No	Max characters: 4.
customerType	Number	No	Must be a number or will not be imported. Defines the type of customer. Use 1 for wholesale, 0 for retail. If left blank or not mapped, defaults to 0 (retail customer).
iRewardsPointsAccrued	Number	No	Must be a number or will not be imported.
CI1	Text	No	Custom input field (see Checkout Options)
CI2	Text	No	Custom input field (see Checkout Options)
RecvNews	Number	No	Must be a number or will not be imported. Defines whether the user opted to receive the store newsletter. Use 1 for yes, 0 for no.

Notes:

- The “E-mail Address” field is required for both a new import and an update procedure. The field is not case sensitive. In ProductCart, the e-mail address is also the customer login name.
- If you are importing a CSV file, do not use double or single quotes at the beginning of any field.

Note: To ensure that you can quickly revert back to the way your store database was structured before performing an import or update, we strongly recommend that you ALWAYS BACK UP your existing store database before performing an import or update procedure. If your store uses a MS Access database, you can simply download the *.mdb data file to your computer. If your store uses a SQL database, enquire with your Web hosting company about how you can have your database backed up and restored.

Customer Type

As mentioned above, the Customer Import Wizard allows you to specify the type of customer you are importing. You can import a customer account as either a retail or wholesale customer:

- If the file that you are importing does not contain a "customer type" field, all customers will be imported as retail customers. The same is true if you are mapping the field, but the field is left empty or has the value "0".
- Map the customer type field and enter the value "1" to import the customer as a wholesale customer.

For more information about the difference between retail and wholesale customers, please refer to the Retail vs. Wholesale Customers section.

Step 1 – Upload the file

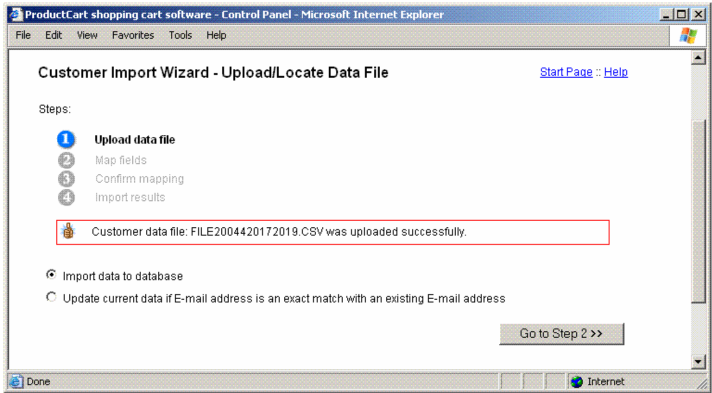
Now that you have prepared your Ms Excel or CSV data file for importing it into ProductCart, select *Import Customers* from the *Manage Customers* menu. ProductCart's **Customer Product Wizard** will be started and the following shown below will be displayed.

Make sure to **back up the ProductCart database** before proceeding (e.g. FTP the file to your local computer). This is especially important if you are importing data into already active store. You will be able to quickly restore the database in case for any reason the import procedure did not complete successfully.

You can either upload the data file through the Import Wizard or via FTP (recommended for large files). If you choose to upload the file through the Import Wizard, browse to the file and then click on the *Upload* button. The form is validated to make sure that only *.XLS and *.CSV files are uploaded to ProductCart. If you prefer to use FTP, you must place the file in the following folder: "*pc/catalog*" and then enter ONLY THE FILENAME in the field provided. ProductCart will verify that the file exists on the server before proceeding to Step 2.

Once the file has been uploaded/located successfully, the Customer Import Wizard will ask you to choose whether you intend to import new customer information to the database, or update existing customer accounts.

- If you are **importing data** into your store database, ProductCart will NOT import customers whose e-mail address matches that of customers that already exist in the database. Products that could not be imported due to an email address match are listed at the end of the import procedure.
- If you are **updating data** note that the e-mail address is used as the customer identifier. A customer account will be updated when the e-mail address is an exact match. If the e-mail address is not an exact match, a new customer account will be added.



Step 2 – Map the fields

The next window allows you to easily map fields between the two databases. Your import file's column headings are listed on the left side and ProductCart's on the right. Carefully map each field. Leave blank the ones for which you do not have any information to import. Note that the e-mail address field is required.

ProductCart saves the current mapping preferences so that you don't have to remap all the fields in case to need to import data from the same file (e.g. you may use the same Excel spreadsheet multiple times to regularly import new customer data from another application).

Make sure that you don't map the same field twice. If you do so, ProductCart will return an error message and will prompt you to verify that all fields are mapped uniquely.

Step 3 – Confirm mapped fields

Next, ProductCart shows you the fields as you have mapped them. Verify that the information is correct, and then proceed to the next step. Otherwise, go back to Step 2 and change the incorrect mapping settings. ProductCart will now start populating the database. Depending on the number of records that you are importing, this task may take several minutes.

Step 4 – Import completed

Once all records have been imported, ProductCart will display a report that lists the number of records successfully imported, those that could not be imported and why. For example, you will be shown a list of customers that could not be imported due to the fact that you were importing duplicate e-mail addresses.

To visually confirm that the import was successful, select *Manage Customers > View All* and look for customer accounts that you have just imported.

"Undoing" the last import/update

ProductCart allows you to easily "undo" an import/update by reverting back to the data that was stored in the customer table before new data was imported or updated.

When customer accounts are imported or updated, ProductCart saves a log of what information was imported in the file *importLogs/custlogs.txt*. The system uses this information to remove the data that was imported/updated.

To "undo" the last import/update, select *Import Customers* from the *Manage Customers* menu, and then click on the *Undo Last Import* or *Undo Last Update* button. Note that the button is only visible once you have imported or updated products. The "undo" can only be applied to the last import or update. It cannot be applied to previous imports or updates.

Note that this feature is <u>not</u> a substitute for backing up your store database before importing or updating data. Backing up your database remains the safest way to ensure a quick recovery in case the database is compromised during an import or update procedure.

Newsletter Wizard

ProductCart makes it easy to send messages to targeted customer lists with the new Newsletter Wizard. Using Newsletter Wizard you can build filtered customer lists (e.g. only customers that purchased a certain product, or within a certain date range, etc.), then send a targeted message to it, in text or HTML format. You can also, easily test the message before sending it to the entire list.

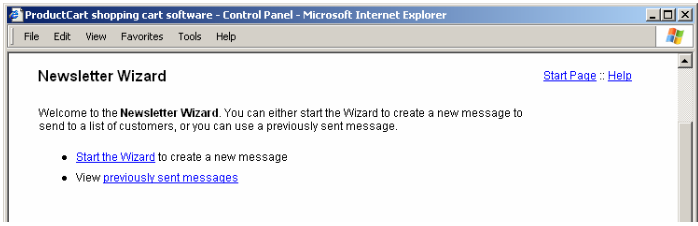
As mentioned earlier in this document, you can use Newsletter Wizard <u>only</u> if you have set up your store to allow customers to decide whether or not they would like to receive newsletters and other messages from you (See how >>). The rationale behind this system behavior is very simple: Early Impact wants to make it clear that this feature should NOT be used for spamming.

Customers will be able to **opt in** to receive information from you by checking the corresponding check box when they register with your store, or as they checkout. If you updated from an earlier version of ProductCart, customers can opt in by checking the same checkbox on the account details page after logging into their account and selecting *Modify Personal Information*. You can encourage customers to opt in by offering them special discounts. For example, you can publicize the fact that special promotions on your store are only available to the recipients of your store newsletter.

Similarly, customers can **opt out** of your list of newsletter subscribers by logging into their account and unchecking the same check box. Please note that when you send a message to your customers using Newsletter Wizard, unsubscribe information is NOT automatically added to the message. The language to use (if any) to instruct customers on how to opt out is left for you to decide.

We strongly recommend that you do not send messages to customers that have not opted to receive information from you, or that have opted out of the list, except in special emergency situations. For example, an emergency scenario would be that of an online toy store that issues a recall on a dangerous baby toy, or a software store that provides customers with a security update for a certain application, and so on.

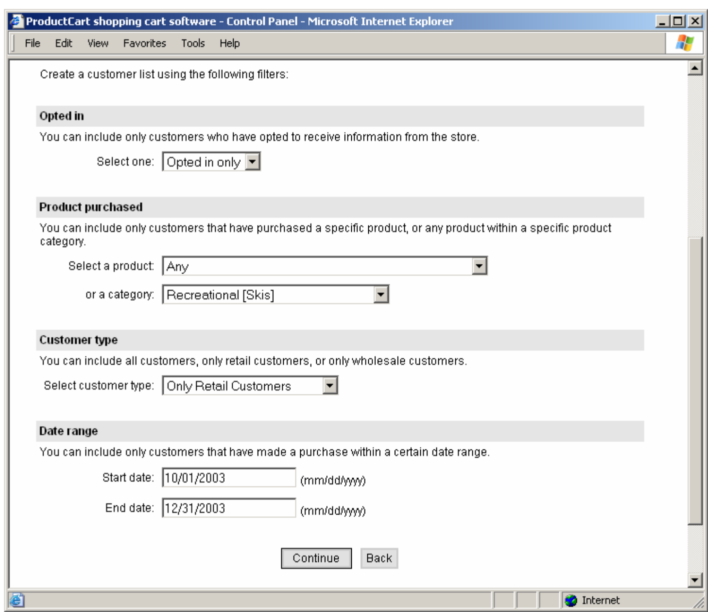
> **<u>NO SPAM</u>: DO NOT USE** this feature to send SPAM email. Regardless of whether or not spam is considered illegal in your State and/or Country, sending unsolicited messages is not what this feature is meant for. It is also not a good marketing practice and it will harm your business in the long run.



To start using Newsletter Wizard, select *Manage Customers > Newsletter Wizard*. You can choose of the following two options:

- Start the Wizard to create a new message. You will be taken through the steps described below. Select this option if this is the first time you use this feature.
- View previously sent messages. Select this options to see a list of previously sent messages, the number of recipients the message was sent to, and the date it was sent. This feature allows you to select a message that you have already sent to a customer list, then send it to another list, with or without editing it.

When you start the Wizard to create a new message, the first step will be to generate a targeted customer list. You can use the following filters:



- Opted in. You can include only customers who have opted to receive information from the store, or you can include all customers. We strongly recommend using the second approach only in emergency scenarios, as mentioned earlier in this section.
- Product purchased. You can include only customers that have purchased a specific product, or any product within a specific product category. The default selection is "Any", which means that customers that have purchased any product, from any category are included.

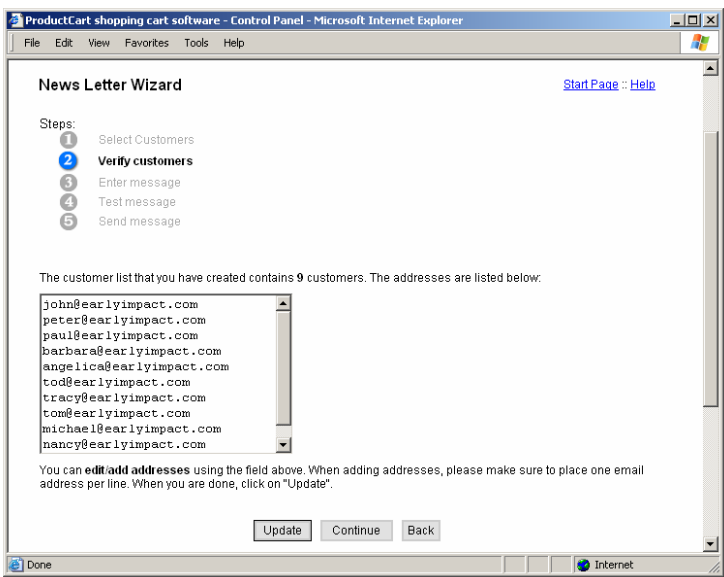
- Customer type. You include all customers, only retail customers, or only wholesale customers.

- Date range. You can include only customers that have made a purchase within a certain date range. If you leave the field blank, the date in which an order was placed is not used as a filter.

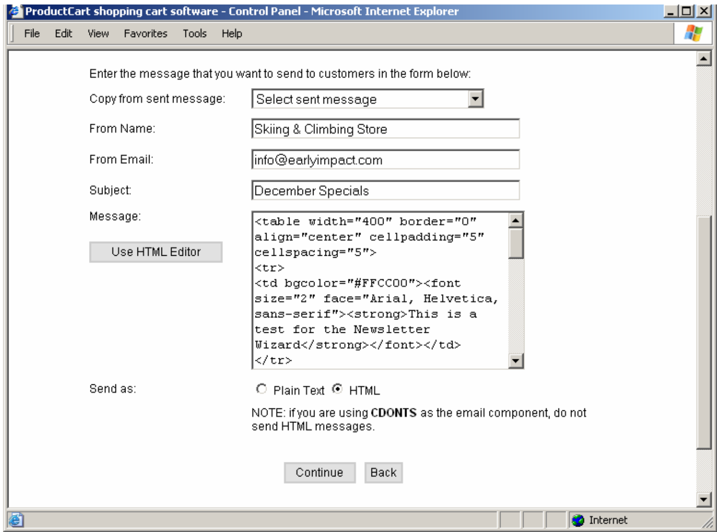
Click on the *Continue* button to build a customer list using the selected filters. Newsletter Wizard will now display the results of the filtered search, indicating how many addresses have so far been added to the list. The addresses are shown in a text area. At this time, you can easily add or remove customers to the list. In order to add e-mail addresses to the list, paste the new addresses into the text area that contains the current e-mail list built by Newsletter Wizard. Make sure to include only one address per line. You can copy and paste addresses from another application, but they will have to meet this formatting requirement. You cannot have two addresses on the same line, even if they are separated by a comma or semicolon.

When you are done adding/removing addresses, click on the *Update* button. Verify that the number of addresses detected by ProductCart matches your changes. If you click on the *Continue* button prior to selecting *Update,* you will loose your changes.

To proceed to the next step, click on the *Continue* button.

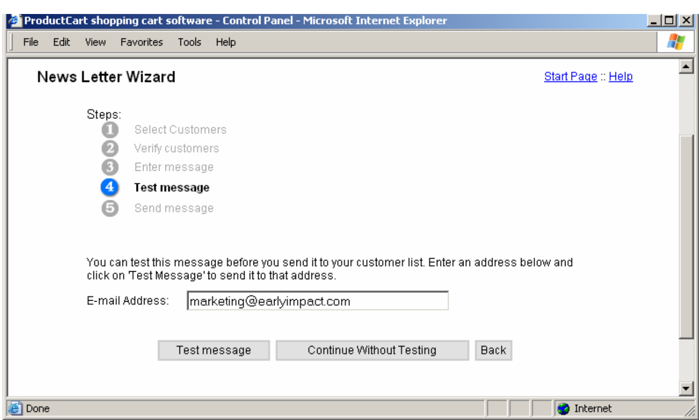


You are now ready to compose the message that will be sent to the list you just created. You can either compose a new message, or select an existing one from the list. If you have previous messages available and opt to use one of them, the page will refresh itself automatically when you make a selection from the *Copy from sent message* drop-down menu, and will pre-fill the form fields with details from the selected message.



- From Name. Enter the sender's name that you want this message to display.
- From Email. Enter the sender's address that you want this message to carry with it.
- Subject. Enter the message subject. The message you send will be saved to the system for future use. The message subject will be used to identify the message after it has been sent. Therefore, it is a good idea to use a unique subject (e.g. add an identifier at the end of the subject).
- Message. Enter either a text or HTML message. You can cut and paste HTML code from your favorite HTML editor, or use the built-in HTML editor. Do NOT use HTML code generated by Microsoft® Word.
- Send as. Select whether you are sending an HTML or text message. Note that if CDONTS or CDOSYS is your email component, you cannot send HTML messages.

You are now ready to send your message. To make sure it will be received by customers exactly the way you expect it to be received, you can test the message before you send it to your entire customer list. Enter an e-mail address in the corresponding text field, and click on *Test Message* to send the message to that address. Only enter one e-mail address. If you would rather continue without performing the test, select *Continue Without Testing*.



Check the e-mail account to which the test message was sent. If everything looks according to your expectations, click on *Send Message* to start sending the message to your customer list. ProductCart will regularly update the page to show you how many messages have been sent of the total messages that will be sent. Depending on the e-mail component set up on your store, sending a message to your customers can take up to a few seconds for each address included in the list. Messages are sent one by one to avoid triggering filters that may be in place on your Web hosting company's e-mail server.

> **Note**: ProductCart's Newsletter Wizard is not intended to handle large email lists. Messages are sent one by one, to avoid exceeding limitations to the number of concurrent receipients that may be in place on your Web server's mail server. In our tests, sending a message typically took between 1 and 2 seconds each. Therefore, sending a newsletter to 100 customers could take up to 3 minutes.

Using the Help Desk

ProductCart now includes a Help Desk application that allows you to effectively communicate with customers by managing order-related customer service requests through an organized ticket system. For more information, please see the Managing the Help Desk section.

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Chapter

10

Managing Affiliates

Affiliate marketing is what has been behind the success of many of the largest online stores in the world. Are there other Web sites on the Internet that may be interested in promoting your products, or just talking about them? If the answer is yes, then it may be a good idea for you to set up an affiliate program.

The concept of using *affiliates* is simple: a Web site other than yours refers potential customers to your store and, if they order, the referring site (the Affiliate) receives a commission on the sale. Affiliates can generate significant incremental revenues for your store, and are rewarded in doing so by the commissions that you will pay out to them.

To implement an affiliate marketing program, you will need a system that tracks who referred the customer that made an order and keeps a log of commissions accrued by each referrer. You will also want affiliates to have access to an area where they can obtain the referring links that they will use on their Web sites and can track their sales commissions.

Overview

ProductCart v2.6 and above include a number of new features that will allow you to manage your affiliate program more productively. You can now let new affiliates sign up through the storefront and have access to a password protected area where they can retrieve store links that contain their affiliate tracking information.

Affiliates can now also view sales on which they have earned a commission and a history of commission payments that you have entered into the system. If you are just getting starting with launching an affiliate program, ProductCart will likely work just fine for you. However, keep in mind that ProductCart does not provide some of the advanced affiliate tracking features offered by more sophisticated systems such as Commission Junction (http://www.cj.com) and MyAffiliateProgram (http://www.myaffiliateprogram.com). For example, in ProductCart you cannot associate different commissions with different products within the same affiliate account. If an affiliate is given a 20% commission, the commission will applied to all orders referred by the affiliate. At the time this document was written, getting started with Commission Junction required a few thousand dollars, MyAffiliateProgram around $1,000.

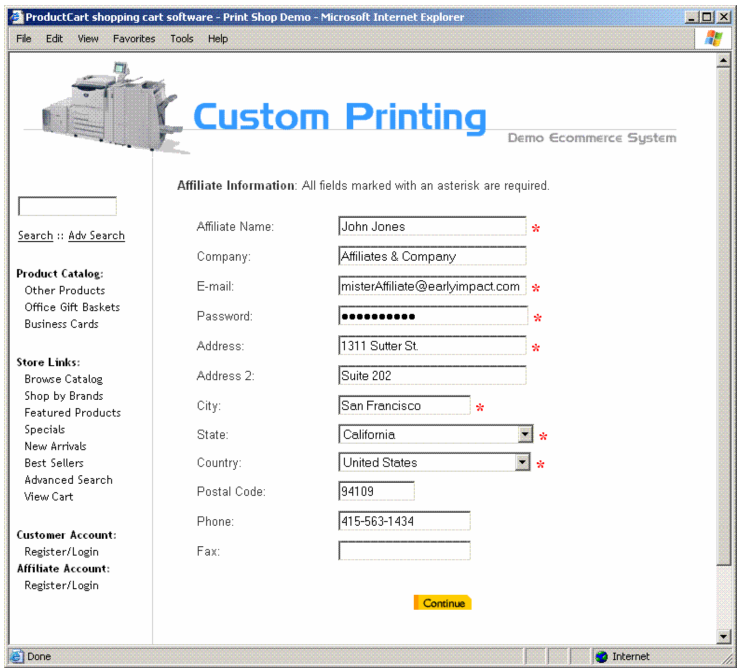
If your affiliate management needs become more sophisticated (e.g. you need to automatically calculate commissions and send checks to your affiliates), you will probably want to look at using a third-party system such as the ones mentioned above. A set up fee and monthly fees typically apply. ProductCart can be integrated to work with more advanced affiliate program management systems, although custom programming may be required.

Adding & Editing Affiliates

There are two ways to add a new affiliate to your store:

- You can **let affiliates sign up on their own** by providing them access to the page in your storefront that is shown below (the URL to the page is also included below). When an affiliate signs up, a notification email is sent to the store administrator. Note that the new affiliate account is kept inactive until you activate it. This means that the new affiliate will not be able to log into the affiliate account management area, whose features are described later in this chapter.

  http://www.yourStore.com/productcart/pc/AffiliateLogin.asp



- You can **add a new affiliate** account directly **using the Control Panel**, in the *Manage Affiliates* section. The form looks almost identical to the one shown above, except for the fact that you will be able to specify the commission rate. If you want to give an affiliate a 11.50% commission, enter 11.5.

ProductCart will automatically generate a unique ID for the new affiliate, which is what will be used to identify orders coming from its Web site.

If you add new affiliates using the Control Panel, remember to e-mail them their e-mail address and password, so that they may log into their affiliate account management area and generate special links to your store that contain the affiliate ID mentioned above. The link to logging into this area of your storefront is as follows:

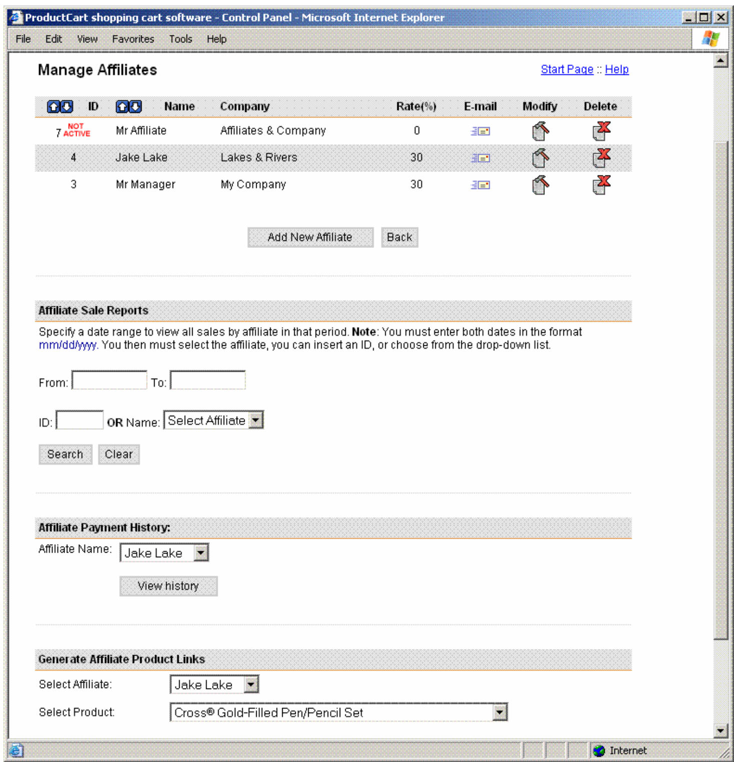
http://www.yourStore.com/productcart/pc/NewAffa.asp

Viewing Sales & Commissions Reports

Once new affiliates have been added to the system, you will be able to view information about them, edit their profiles, render an account active or inactive, and view sales commissions and payment history reports. To do so, select *View/Modify Affliates* from the *Manage Affiliates* menu. A page similar to the one shown below will be displayed.

The top part of the page lists your affiliates and allows you to view, modify, or delete affiliate accounts. The middle section of the page allows you to obtain a report on sales on which a commission was earned by any affiliate, within a specific date range. This is the same report that you can generate from the *View Sales Reports* area of the Control Panel.

Commissions earned on an order are also shown at the bottom of the order details page. If needed, you can also change the commission amount on the same page.



The bottom part of the page allows you to **generate links for an affiliate**. Affiliates are able to do the same thing using their account management area in the storefront. For ProductCart to recognize which affiliate referred a certain customer, the link that the customer clicks on must contain special code that identifies the affiliate. For example, let's say that a Web site would like to insert on their Web pages a link to your store so that whatever a customer buys, they would get a commission. The link would look like this:

http://www.yourStore.com/ProductCart/pc/mainIndex.asp?idaffiliate=9

This is the exact same link that you are using on your own Web site to link any page of your site to the store's front page, except for the code that appears at the end of the link: "idaffiliate=9". This code identifies that affiliate number 9 is the one sending the customer to your Web site.

Without the identifier, ProductCart would not recognize that a Web site referred the customer, and you would not know if you owed a commission.

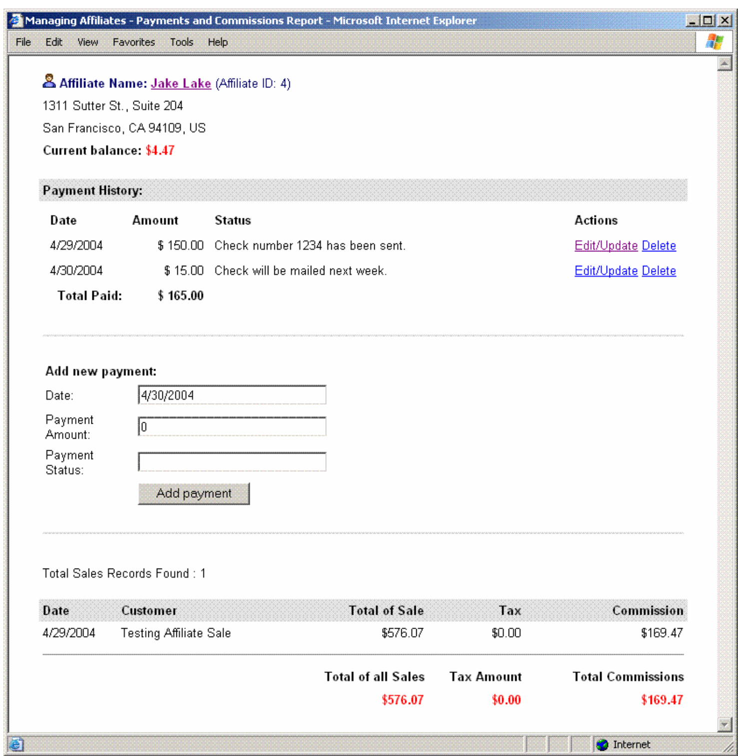
Use the *Generate Affiliate Product Links* feature to generate both store and product-specific links for your affiliates. To generate a link for a specific product, select the affiliate for whom you are generating the link, then select the product from the drop-down menu, and finally click on *Generate Links*.

Paying Commissions

The *Affiliate Payment History* section of the *Manage Affiliates* page gives you access to a reporting tool that allows you to view sales and commissions specific to an affiliate. In addition, you can use this page to enter commission payment information for that account. Select an affiliate from the drop down menu, and then click on *View History*. ProductCart will launch a new window, organized in a printer-friendly format with general information about the affiliate located at the top of the page, a list of payments made to the affiliate, and a summary of sales on which the affiliate earned a commission.

Use the *Add new payment* section to post a new payment for this affiliate. The date field is prefilled with today's date. Enter the payment amount and a description for it, and press the *Add payment* button. The amount of the payment will be deducted from the *Current Balance*, which is shown at the top of the page.

Note that the same information that you are adding here will be shown to the affiliate when he/she logs into the affiliate account management area in the storefront.



Chapter

11

Managing Orders

Processing orders in a timely and efficient manner is one of the most important aspects of running an online store. On one side, your customers' satisfaction is tightly connected to how orders are processed. On the other side, order processing can be time consuming and human resource intensive. ProductCart can help you manage your orders effectively, and at the same time improve your customers' satisfaction by keeping them updated on their order status at each step of the order management process.

ProductCart includes a number of advanced order management tools. They include a completely redesigned *Process Order*, the ability for the store administrator to fully edit an order after it has been placed, and a new batch processing feature that allows you to easily process multiple orders at once. In addition, the process of managing a return on a shipped order has been completely rewritten, and now features a sophisticated system to issue and process RMAs (Return Manufacturer Authorization).

First, let's take a look at how orders are handled by ProductCart. There are five types of orders on your online store.

Incomplete Orders

When customers begin the checkout process, reach the payment details page, but for any reason decide not to complete the order, ProductCart considers the order *incomplete*. Order details have already been saved to the database at that point, but no payment information of any kind has been collected.

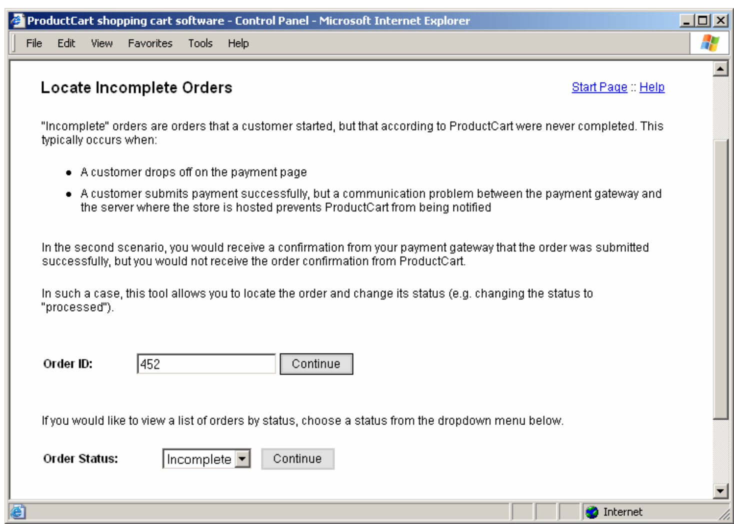
An order can be *incomplete* for two reasons:

- Drop-off. The customer decides not to leave the store during the final step of the checkout process, i.e. before entering payment information. This is what industry experts refer to as customers "dropping off" the shopping cart. The drop-off rate, the number of incomplete orders vs. the total number of orders successfully completed can be quite significant on some stores. Many variables play a part in determining your store's drop-off rate, and discussing how to reduce it is beyond the scope of this document. A professional graphical interface, accompanied by the use of an SSL certificate, can certainly help customers feel more at ease on the payment details page, and therefore help reduce the drop-off rate.

- Connection Problem. It can happen that a customer submits payment information successfully, but a communication problem between the payment gateway and the server where the store is hosted prevents ProductCart from being notified of the successful transaction. This scenario occurs only when using a real-time payment option. In this scenario, you would typically receive a confirmation from your payment gateway that the order was submitted successfully, but you would not receive the order confirmation from ProductCart. In such a case, the Control Panel includes a tool that can assist you in manually updating the order status, so you account for and process the order.

To locate one or more incomplete orders, select *Manage Orders > View Incomplete Orders*. The screen shown below will be displayed. If you are in the second scenario described above, the payment notification received from your payment gateway should contain the order ID used by ProductCart. Simply enter it here to locate the incomplete order for which you need to update the order status.

To view all incomplete orders, select *Incomplete* from the *Order Status* drop-down menu, then click on the *Continue* button. ProductCart will display a summary of all the incomplete orders that have been placed on your store, sorted by date with the latest order first (15 orders per page are shown, and navigation bar is displayed at the bottom of the page if more than 15 orders are returned in the search).



Unless you change the status of an incomplete order, the order is never shown in the Control Panel, other than through the *View Incomplete Orders* feature. To change the status of an incomplete order, locate the order as described above, then select *View Details*. Review the order details, then press the *Update Order Status* button located at the bottom of the page. The order status will be switched to *Pending* and you will be automatically taken to the *Process Order* where you can further review and process the selected order.

Note that no e-mail message is sent to the customer at this point. You can have ProductCart automatically send an e-mail to the customer when the order status is updated to *Processed* as explained later in this chapter.

Pending Orders

Pending orders are orders that were successfully submitted, but for which you have not yet received payment and therefore have not yet been processed.

- All orders that were submitted using a payment option other than real-time credit card processing or PayPal are labeled *Pending*. For instance, if your payment options were "Credit Card" (not connected to a payment gateway) and "COD", all orders submitted on your store would be labeled *Pending*.
- An order is also considered *Pending* when a payment gateway has been set up to authorize, but not capture funds when processing a transaction. Since payment has technically not been collected, ProductCart assumes that the order will still need to be reviewed and manually processed once it's been deemed accurate and legitimate. Depending on the payment gateway used in the transactions you may then capture funds either manually, by logging into the payment gateway's administration area, or through the batch processing feature described later in this chapter.
- An "**Order Received**" e-mail message is automatically sent to the customer when an order has been placed, but it is still *Pending*. The message, which you can fully edit using the *E-mail Settings* area of the Control Panel, should indicate to the customer that the order has been received and that it will be processed. It should not be an order confirmation message.
- When customers log into their account, select *View Previous Orders* and click on a particular order that is still pending, they will see a message stating that the order has not yet been processed.
- Pending orders can be edited using the *Edit Order* feature described later in this chapter. You should not process an order if you plan to edit it. Only *Pending* orders can be edited.
- Pending orders can either be processed, batch-processed, or cancelled.

Processed Orders

ProductCart considers processed orders that were successfully submitted and for which payment confirmation has been received, or that you have decided to process even if you have not yet received payment.

- All orders associated with real-time credit card processing and PayPal are by default considered *Processed* by ProductCart since the funds are automatically deposited to your bank account (or PayPal account). For those payment gateways that allow for an "authorize-only" option, this assumes that the gateway has been configured to capture, and not just authorize transactions. Otherwise, the orders will be considered *Pending*.
- With all *Pending* orders, regardless of the payment method, you can manually change the status to *Processed* either one by one, or by batch processing multiple orders at once.
- When you batch process *Pending* orders that were placed using a payment gateway that supports batch processing, ProductCart will not only change their order status to *Processed*, but will also connect to the payment gateway and instruct it to capture funds for every order that is part of the batch. If for any reason funds cannot be captured for any of the orders that are part of the batch, ProductCart will return a message stating so.

- ProductCart sends an "**Order Confirmation**" e-mail when the order's status is changed to *Processed*, unless you instruct it not to do so. When an order is placed using a real-time payment option that has been set up to authorize and capture funds, ProductCart considers the order *Processed* at the time it is placed, and therefore automatically sends the order confirmation message immediately after the order is placed. You can partially edit the copy of this e-mail message using the Control Panel.
- When customers log into their account and check the status of their order, a message will now state that the order has been processed.
- Inventory levels are adjusted when an order is placed, not when the order is processed. This is to eliminate the chances of customers being able to order an already out-of-stock product when there is a delay in the processing of the order that had put the selected product out of stock.
- *Processed* orders are included in sales reports, unlike pending orders.
- *Processed* orders cannot be edited. Only *Pending* orders can.
- *Processed* orders can either be *Shipped* or *Cancelled*. If an order is cancelled, it will not show up in sales reports and the inventory level will be readjusted to account for the fact that the items were never shipped.

Shipped Orders

These are orders that were received, paid for, and shipped.

- You can either change the status of an order to *Shipped* manually via the *Process Order* page or you can *batch ship* multiple orders at once. Both features are described in more details later in this chapter. When ship an order you have the ability to add shipment information such as date, shipping provider and tracking number, if any.
- ProductCart sends an "**Order Shipped**" e-mail when the order's status is changed to *Shipped*, unless you instruct it not to do so. The e-mail contains the shipping details that you provided. You can partially edit the copy of this e-mail message using the Control Panel.
- *Shipped* orders cannot be cancelled. However, they can be fully or partially returned. ProductCart contains a complete return management system, which is described later in this chapter.
- When customers log into their account and check the status of their order, a message will now state that the order has been shipped. If you have entered details (like tracking information) for the shipment, they will be shown as well.

Retuned Orders

These are orders that were shipped, but were fully or partially returned by the customer. For more information about how to manage returns in ProductCart, please see the *Managing Returns* section of this chapter. ProductCart now allows you to effectively manage returns by issuing return authorization numbers when customers request to return one or more products.

- The order status is not automatically set to *Return* when a return request has been approved, since the request may be for a partial return. See the *Managing Returns* section for more information.
- Returned orders no longer show up in sales reports, just like a cancelled order.
- Inventory levels are not automatically readjusted to account for the returned items, because they may be damaged. If you need to adjust the inventory level, you may do so as described in Chapter 4.

Cancelled Orders

These are orders that were cancelled before being shipped.

- You can only change the status of an order to *Cancelled* manually from the *Process Order*.
- ProductCart sends an "**Order Cancelled**" e-mail when the order's status is changed to *Cancelled*, unless you instruct it not to. You can fully edit the copy of this e-mail message from the *E-mail Settings* section of the Control Panel.
- Cancelled orders no longer show up in sales reports.
- If the order is cancelled, inventory levels are automatically readjusted.
- If the customer accrued any Reward Points as result of the order, those points are deducted from the customer's account when the order is cancelled.
- Even if the order was placed using a real-time payment option, funds are not credited to the customer's account when the order is cancelled. In other words, ProductCart does not connect to the payment gateway and process a refund when an order is cancelled. To do so, you will need to log into the administration area of your payment gateway and manually process the refund according to the instructions provided by the gateway.
- When customers log into their account and check the status of their order, a message will now state that the order was cancelled.

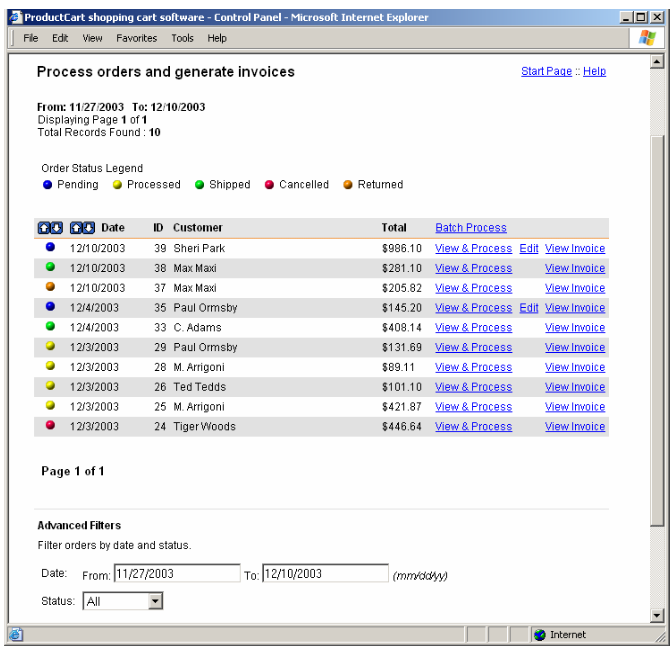
Viewing Recent Orders

To view recently placed orders, select *View and manage latest orders* from the *Start* page, or select *Manage Orders > View All Orders*. By default ProductCart displays all orders placed within the last 2 weeks, 15 orders per page. You can change this date filter (e.g. to display all orders in the last 30 days) using the *From* and *To* fields at the bottom of the page. Make sure to respect the date format *mm/dd/yy*. You can also filter orders by status (e.g. only display pending orders).

The following information is displayed on the page:

- Order status – Refer to the legend located at the top of the page to understand which color is associated with each order status. You can resort the orders shown on the page by their status using the blue arrows at the top. You can filters the orders by their status using the drop-down at the bottom of the page.
- Order date – This is the date on which the order was placed. You can resort the orders shown on the page by their date using the blue arrows at the top.
- Order ID – The order ID reflects the order number increase that you may have entered in the *Store Settings* page.

- Customer Name – The name the customer provided as part of the billing address. The name provided as part of the shipping address is shown on the *Process Order*.
- Order Total – The order total. It does not include any credits that may have been posted as a result of a return (see *Managing Returns* for more information).
- View & Process – Click on this link to view details for the selected order. The many features of the *Process Order* are described later in this chapter.
- Edit – If the order status is *Pending*, you may edit the order details as described in the *Editing an Order* section of this chapter. The link is not shown if the order status is other than *Pending*.
- View Invoice – Click on this link to display a printer-friendly version of the order in a new browser window. The image used on this page is defined in the *Store Settings* area of the Control Panel using the *Company Logo* field.
- Batch Process – Click on this link to display a page that lists all *Pending* orders, and allows you to select multiple orders to be processed at the same time.



Locating an Order

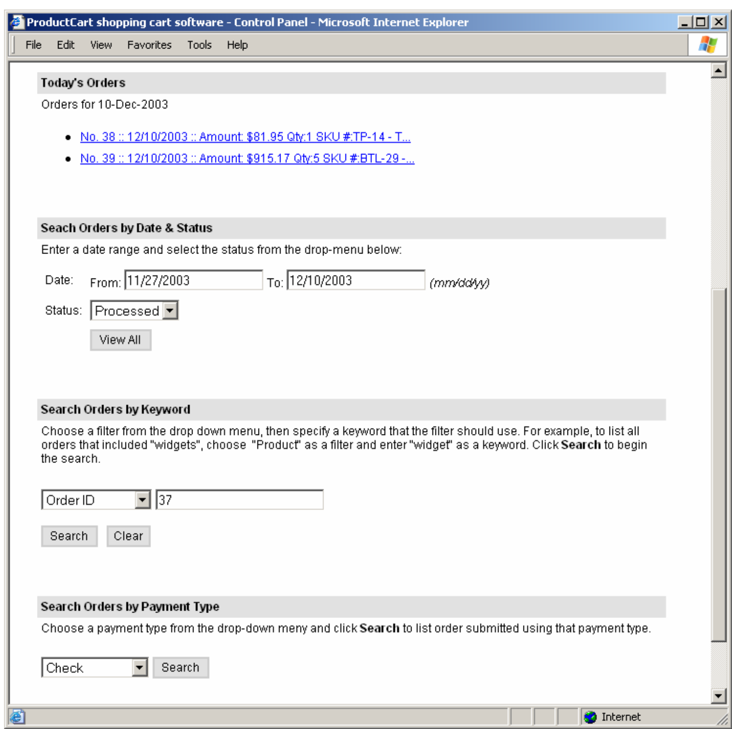
If your store receives a large amount of orders, you can search for a specific order using the *Locate an Order* feature. Select *Locate an Order* from the *Manage Orders*: the page is divided into 4 sections.

In the top section ProductCart lists a summary of orders received that day.

The other three sections of the page allow you to look for an order using a variety of filters.

- **Search orders by date and status**. Just like on the *View All Orders* page mentioned above, you can filter orders by using a date range and/or order status.

- **Search by keyword**. Select the criteria that you would like to use in your search and enter the corresponding keyword. Click on the *Search* button to run the search.
    - To look for a specific order, select *Order ID*, enter the order number. If you incremented the order number using the *Order Number Increase* field on the *Store Settings* page, ProductCart will take that number into account. So you can simply enter the order number as it is shown in the Control Panel.
    - To look for all orders that contain a certain product or product type, select *Product* and enter a keyword that is part of the product name.
    - To look for all orders that were shipped using a specific shipping service, select *Shipping Type* and enter a keyword that is part of the shipping method. For example, to look for orders that were shipped using UPS Ground, you could enter "ground".
    - To look for orders placed from a specific state or country, select *State Code* or *Country Code* and enter the corresponding code. For example, for a list of orders placed from the state of California, enter "ca", not "California".
- **Search by payment type**. Select the payment type from the drop-down menu, and then click on the *Search* button to run the search. The drop-down lists all payment methods currently active on your store.

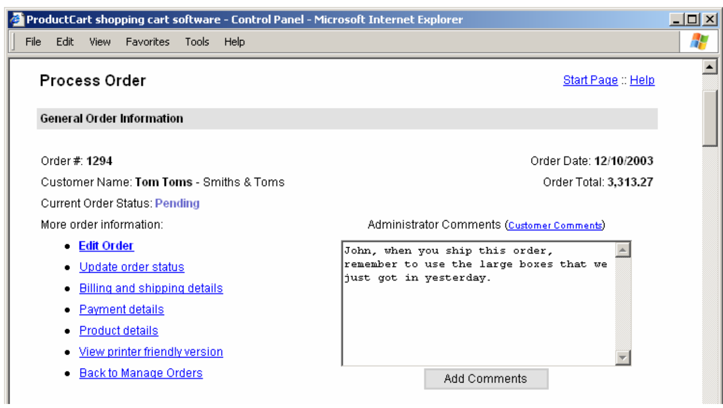


The search results page is structured just like the *View All Orders* page described earlier in this chapter. Note that *Incomplete* orders are not shown among the search results. For more information, see the *Incomplete Orders* section of this chapter.

You can also search orders by customer, as described in the *Managing Customers* chapter. This feature allows you to view all the orders placed by a specific customer.

Processing an Order

Once you have located the order that you would like to process, click on the *View & Process* link to load the *Process Order* page. This page containing details on the order itself (products, discounts used, options selected, text entered in custom input fields …), the customer that submitted it, the payment option that was selected, shipping information, and more. If the order was referred by an affiliate Web site, that information will also be displayed, together with the commission owed to the affiliate on that sale (if needed, you can edit the commission earned on that order).



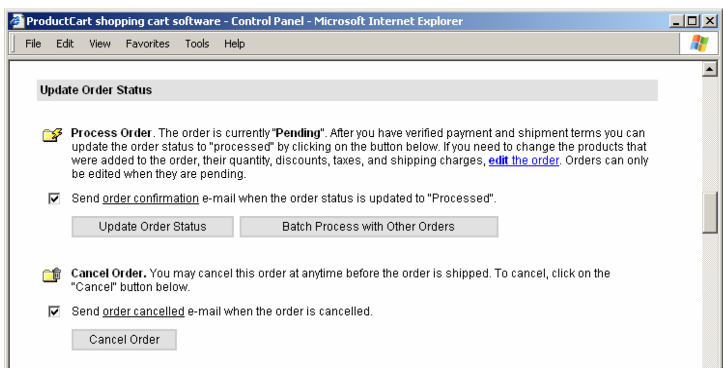
The *Process Order* page is divided into several sections. In the top part of the page these are a series of links that will help you navigate to the order processing feature that you are looking for.

- The *Edit Order* link will take you to a page where you can fully edit the order. This feature is described in the next section. Note that this link is only available when an order is *Pending*. The rationale behind this feature is that orders should never be edited once they have been processed and payment has been collected. Since there may be scenarios that represent an exception to this rule, ProductCart allows you reset the status of any order to *Pending* even if it has already been processed. To do so, use the *Reset Order Status* drop-down menu located in the *Update Order Status* section of the page.
- Click on *Update order status* to be taken to the section of the page where you can change the status of this order. Whenever you update the order status you can choose whether or not to notify the customer via e-mail.
- Click on *Billing and shipping details* to view more information about who placed the order and where it should be shipped to.
- Select *Product details* to view a list of products purchased.
- Select *View printer friendly version* to view a printer friendly version of the *Process Order* page, which opens in a new browser window. The image used on this page is defined in the *Store Settings* area of the Control Panel using the *Company Logo* field.
  When you generate the printer-friendly version of the order, you also have the option to show or hide pricing information, which allows you to create either a packing slip or an

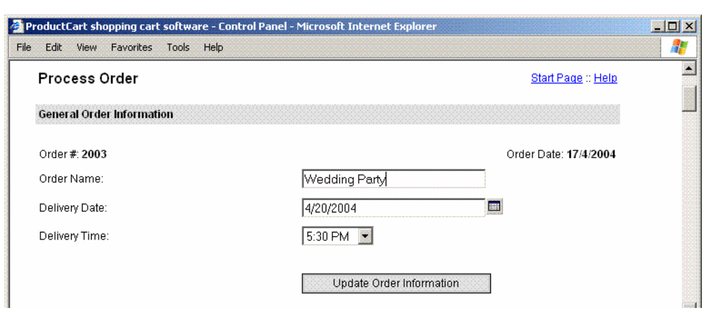
invoice. If you are creating an invoice, you can also have ProductCart use an invoice number that you can manually enter. This allows you to address the issue of having an invoice number that might be different from the order number automatically generated by ProductCart.

In addition, if the order was placed using offline credit card processing as the payment option, ProductCart will prompt you to select whether or not you would like the credit card number printed on the page. If you are using a POS system to process the credit card transaction offline, this feature allows you to print the information that you will need to enter in the POS system. For privacy and security reasons, make sure you shred any printed invoice that contains the customer's credit card number, immediately after the POS transaction has been completed.

- You can use the *Administrator Comments* text area to enter notes about the order. Click on *Add Comments* to save the notes to the page. Saved notes will appear in the same text area the next time you load the *Process Order* page. Adding administrator notes can be useful especially in a scenario in which there are multiple Control Panel users that have access to processing orders.



- The top part of the page also includes the following general order information:
  - Order name: regardless of whether the order nicknaming option has been enabled for your customers (*General Settings* > *Store Settings*), ProductCart shows this feature to the store administrator.
  - Order Date & Time: If the delivery date & time feature has been enabled on the store, these two fields will show the entries made by the customer during the checkout process.



To process an order, click on the *Update Order Status* link at the top of the page. When you click on the *Update Order Status* button, the following will happen:

1. The order status will be changed to *Processed*.
2. If the order contains one or more Downloadable Products, and any of the products have been configured to use a license generator, the license generator will be invoked to generate N licenses for the order, where N is the number of units purchased for each Downloadable Product that requires a license.
3. The order confirmation e-mail will be sent to the customer, unless the corresponding check box has been unchecked. The order confirmation e-mail will include license information for Downloadable Products, if any.
4. The number of units sold for each SKU included in the order will be deducted from the current inventory level. Note that with ProductCart v2.62 and above this also applies to Build To Order configurations (both the inventory level of the BTO product and of the selected configuration items are adjusted).
5. The number of points Reward Points accrued with the purchase, if any, will be credited to the customer account.
6. If the order is placed by a new customer that was referred by an existing customer, and the Reward Points system is set up to reward the referrer, the referring customer's Reward Points account will be credited an amount of points determined by the current *Referral Points* settings.
7. The order will be added to sales reports.
8. The order will no longer be editable.
9. The order status will be updated on the order details page in the customer's account area.

Please note the following, important comments about processing orders placed using a real-time payment option:

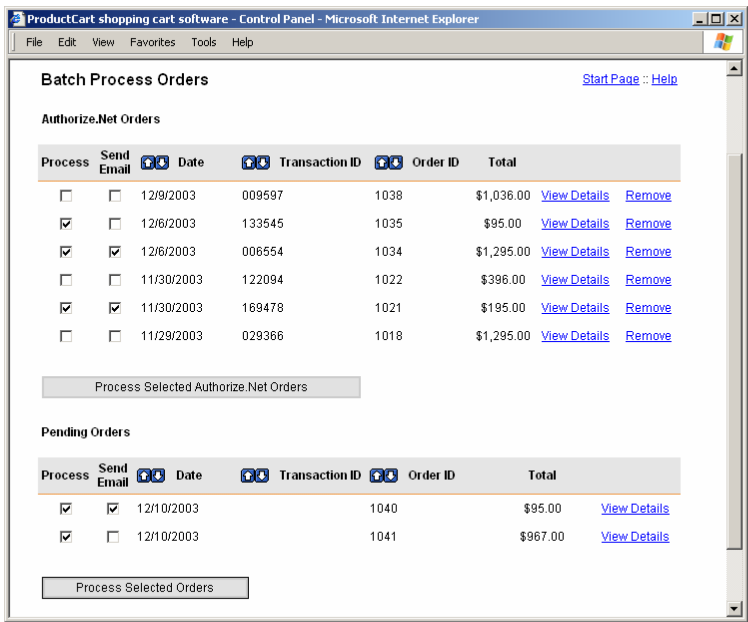
- **Funds not captured upon processing the order**. If the order was submitted using a real-time payment option setup in the Control Panel to authorize, but not capture funds, processing the order will not update the transaction status in the payment gateway's system. In other words, when you process an order from the *Process Order* page, ProductCart does not connect to the payment gateway to capture the funds. You will have to log into the payment gateway's administration area and manually capture the funds according to the instructions provided by the payment gateway.

- **Funds captured via batch processing**. To capture funds automatically as the order is processed you will need to use the *Batch Processing* feature. Note that this feature is not available with all payment gateways, as mentioned in the next section.

- **Order already processed**. If the order was submitted using a real-time payment option configured to immediately capture funds, vs. only authorizing the transaction, the order status will be already set to *Processed* when you view the order in the Control Panel, and all of the tasks mentioned above will have already been performed by ProductCart.

Batch Processing Orders

ProductCart allows you to process multiple orders at once using its new batch processing feature. To batch process pending orders, select *Manage Orders > Batch Process Orders*. The *Batch Process Orders* page displays all pending orders, unless they have been previously *removed* from the batch processing list (see below for more details). Orders for which a real time payment option was used as the payment method are displayed separately from orders for which a non-real time payment method was used. This is because the batch processing feature works differently in the two scenarios. Let's start with orders placed using a payment gateway.



Real Time Payment Methods

We are gradually adding batch processing capabilities to all payment gateways that support this feature. Currently batch processing is available for orders placed using the following two payment gateways:

- Authorize.Net
- Verisign PayFlow Pro

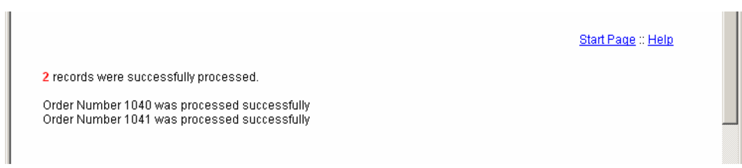
Pending orders submitted with either of these payment gateways are displayed at the top of the page (orders submitted through Authorize.Net via eCheck.Net are not included). The order date, order number, and order total is displayed. Note the following:

- Check the *Process* option to select which orders should be included in the batch.
- Check the *Send Email* option to choose whether or not a confirmation e-mail should be sent to the customer if the order is successfully processed. If the order is not successfully processed, the confirmation e-mail is not sent. You will have to manually process the order using the *Process Order* page.
- Click on *View Details* to view order details for the selected order.

- Click on *Remove* to remove the selected pending order from the list. When you remove an order from the list you are not changing its status, i.e. the order does not get processed. Removing the order is helpful in a scenario in which funds for that order were manually captured using the payment gateway's administration area. In that scenario, if ProductCart connected to the payment gateway to capture funds, the order would not be processed successfully because funds had already been captured. You will have to process that order manually, by using the *Process Order* page rather than the batch processing feature. Therefore, the *Remove* feature allows you to remove such orders from the list of orders to be batch processed if you already know that the corresponding funds have already been captured. In other words, this feature helps you "clean up" the batch processing page.

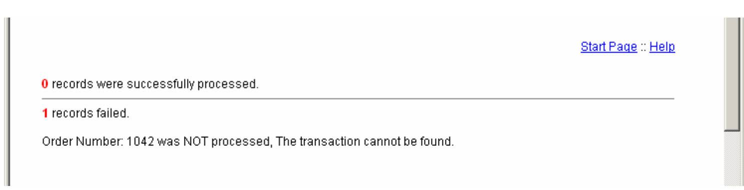
Press the *Process Selected… Orders* button to batch process the selected orders. ProductCart will perform the following tasks:

1. It will first connect to the payment gateway to capture funds. If the order amount has changed, ProductCart will void the initial transaction and submit a new one so that it may be authorized. Please see the *Editing an Order* section for more information about what happens when an order has been edited.
2. For any order whose funds cannot be captured, the following steps are skipped and the order status is not changed. The order remains pending and should be manually processed using the *Process Order* page.
3. If funds are successfully captured, ProductCart performs all the tasks that are performed when an order is manually processed (generating a license for any Downloadable Products, updating inventory and Reward Points levels, etc.).
4. A summary of which orders were successfully and/or unsuccessfully processed is shown.



There are several reasons why an order may not be successfully processed. In most cases ProductCart will display a message that explains why the order could not be processed (this is the message that the payment gateway sends to ProductCart when funds cannot be successfully captured for a transaction). Specifically, funds will not be successfully captured when:

- Funds have been manually captured by using the payment gateway's administration area.
- The transaction has been previously voided.
- The order has been edited and the new order amount cannot be authorized and captured (e.g. the credit limit is exceeded). Please see the *Editing an Order* section for more information about what happens when an order has been edited.



If an order cannot be successfully processed:

- The order confirmation e-mail is not sent.
- The order status is not updated.
- ProductCart behaves as if you never attempted to process the order. You will have to separately process the order using the *Process Order* page.

Orders that are successfully batch processed will no longer appear in the batch process window as their status has been updated from *Pending* to *Processed*.

Non-Real Time Payment Methods

Batch processing is available for all pending orders submitted by using a non-real time payment option. All pending orders are grouped together in the lower part of the window, regardless of the specific payment option used.

No payment gateway is contacted when you are batch processing these orders, and therefore orders should always be processed successfully. Note the following:

- Check the *Process* option to select which orders should be included in the batch.
- Check the *Send Email* option to choose whether or not a confirmation e-mail should be sent to the customer if the order is successfully processed. If the order is not successfully processed, not e-mail is sent.
- Click on *View Details* to view order details for the selected order.

Orders that are successfully batch processed will no longer appear in the batch process window as their status has been updated from *Pending* to *Processed*.

Editing an Order

A useful feature when processing orders is the ability for the store administrator to edit orders after they have been placed. This allows you to easily accommodate scenarios such as…

- … customers wishing to change the quantity for any of the products they ordered.
- … customers wishing to remove and/or add products to an order.
- … customers wishing to change the shipping service selected for the order.

The updated order details will be shown throughout the store, including the order details page in the customer's account area.

Orders can only be edited when their status is *Pending*. Orders that have already been processed (i.e. funds have been collected, the order confirmation e-mail has been sent, etc.) should not be edited, although you can do so by manually resetting the order status to *Pending* using the *Process Order* page.

To edit an order, select *Edit Order* from the order search results page or the *Process Order* page. In both cases the link is only shown if the order is *Pending*, for the reason mentioned above.

Please not the following **important general rules** about editing an order:

1. The original order details are replaced by the edited order. Once you have edited an order, you will not find in the Control Panel the original order details. To keep a record of the original order details, safely store a copy of the order notification e-mail sent by ProductCart to the store administrator when an order is first placed.

2. When you edit an order on the *Edit Order* page order amounts are NOT recalculated unless a new value for any variable has been entered in the corresponding field.

   For example, unless you enter a tax value in the *Taxes* field and check the *Tax* checkbox next to each taxable item, taxes will not be recalculated. The same is true for discounts and processing charges.

3. When you add or remove a product from an order, these changes are immediately applied to the order, regardless of whether you click on the *Update Order* button. The same is true about adding/removing/editing product options.

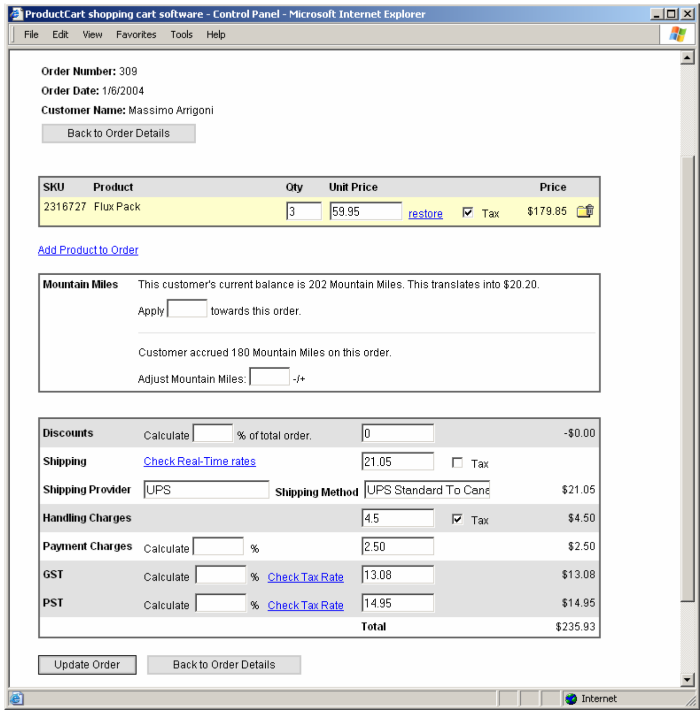
4. When you change product options, if any, the price differential (negative or positive) associated with any option is not applied to the product price. You will have to adjust the product price manually. The rationale behind this behavior is that the *Edit Order* feature allows the administrator to change the unit price to a custom value (e.g. special discount for an upset customer), and does not change that value regardless of any changes made to the product (e.g. addition or removal of product options).

5. When you change the product quantity, quantity discounts are not used for the calculation, if any are present. The rationale behind this behavior is the one just mentioned.

6. When you look up a new shipping rate or new tax rate, or when you restore the product's original unit price, order information is not saved to the store database until you press the *Update Order* button.

7. When the order amount is changed by editing the order, and the batch processing feature is used in conjunction with a real-time payment gateway, the first transaction (for the original order amount) is voided and a new transaction (for the new order amount) is authorized. This can potentially create an issue with the customer's credit limit. Please see *Combining Order Editing and Batch Processing* for more information.

8. You can return to the *Process Order* page by selecting *Back to Order Details*. As mentioned above under (3), some of the changes that you may have made to the order will be maintained even if you did not click on the *Update Order* button.



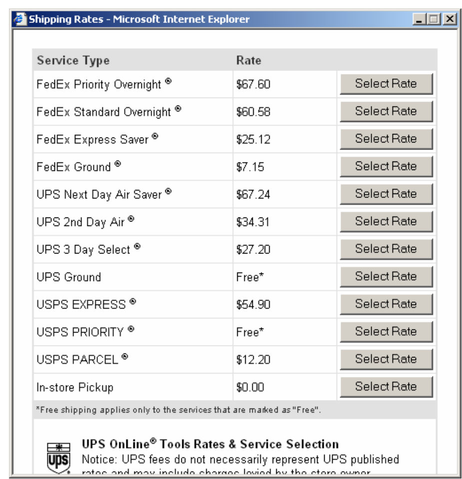
Starting from the top of the page, let's look at each of the features available for editing an order.

- **Editing product options, quantity & price**. You can edit an existing product by changing the quantity ordered, the unit price, whether it's taxable or not, and by editing product options, if any. When you enter a new amount in the quantity field and click on the *Update Order* button, ProductCart recalculates the total based on the unit price that appears in the *Unit Price* field. Note the following rules about the *Unit Price*:
    - o General Rule. The *Unit Price* is not adjusted automatically when you alter other product attributes. The rationale behind this behavior is that the *Edit Order* feature allows the administrator to change the unit price to a custom value (e.g. special discount for an upset customer), and does not change that value regardless of any changes made to the product (e.g. addition or removal of product options).
    - o Quantity discounts. The General Rule mentioned above applies to the recalculation of quantity discounts, for instance. Even if the new quantity entered by the administrator when editing an order makes the order fall into a quantity discount bracket different than the original one, ProductCart will not adjust the *Unit Price* according to the new discount level. It is left up to you to apply the new discount, if necessary.
    - o Option pricing. When you change product options, the unit price will not automatically be adjusted to take into account the price differential that may be associated with selecting a different option. Once again, ProductCart leaves you total control on what *Unit Price* should be used, rather than performing an automatic recalculation.
    - o Shipping Charges. Shipping charges are not automatically recalculated based on the new amount, although entering a different amount may affect the total order weight (it does not whenever the product's weight is zero). However, you can

easily recalculate shipping rates for the order by clicking on the *Check Real-Time Rates* link.

Use the *Restore* feature to load the original unit price for the product from the store database. This feature allows you to quickly look up the product's online price.

- **Adding and removing products**. You can remove a product from the order by clicking on the *Remove* icon. You can add a product to the store by clicking on *Add Product to Order*. When you do so, ProductCart will take you to a page where you can search your store catalog and locate the product to be added to the order. If the product has options, you can select them before adding the product to the order, just like your customers do on your storefront. You can also configure and add a Build To Order product to the order (BTO version only).
- **Reward Points**. You can change the number of Reward Points that the customer either accrued or used with this order.
- **Discounts, shipping, and taxes**. As mentioned earlier in this section, the *Edit Order* page follows the general rule that variables are not included in the order total recalculation unless a new value has been entered in the corresponding field.
  - To add/edit the discount applied to the order, enter a discount value in the corresponding field. If it's a percentage discount, enter a value in the first field. Otherwise enter the discount amount in the second field.



  - To add/edit shipping charges, use the *Check Real-Time Rates* link to recalculate shipping rates for the edited order. The *Shipping Rates* pop-up will be displayed. ProductCart will perform the same shipping rate calculation that it performs during the checkout process. The system will return a list of available shipping services for the order. Click on the *Select* button to pick a shipping service and close the pop-up window. The corresponding value will be automatically copied to the *Shipping* input field. If *Handling Fees* apply to the order, enter the amount in the corresponding input field.
  - To add/edit payment charges, enter a value in the corresponding field. If the fee is calculated as a percentage of the order total, enter a value in the first field. Otherwise enter the fee amount in the second field.
  - To recalculate taxes on the order, use the *Check Tax Rate* link to look up the tax rate that applies to the order. Click on the *Select* button to close the pop-up window and copy the value to the *Taxes* field. Then use the *Tax* check box to select which items in the order are taxable (e.g. handling fees may be taxable, but shipping charges may not).

When you are done, click on *Update Order* to update the order total.

Note: Even if an order was authorized by a payment gateway, the payment gateway is not contacted automatically after editing the order. The order status is not altered when you edit an order. The order remains *Pending*. So after editing an order, remember to process it. Use can use the batch processing feature to contact the payment gateway used to authorize the order to capture the corresponding funds. Note that some payment gateways will not allow you to capture funds when the order amount has increased. See the next section for more information.

Combining Order Editing and Batch Processing

The combination of the new order editing and batch processing features allows the store administrator to accommodate a very flexible order management process, where orders can be accurately verified and edited, if necessary, before being processed and shipped.

The following assumes that the store is setup to use one of the payment gateways that currently support batch processing through ProductCart. The payment gateways that currently support batch processing are (Early Impact plans to add more payment gateways to this feature in the second half of 2004):

- Authorize.net
- VeriSign's Payflow Pro

The following also assumes that the payment gateway has been configured to authorize, but not capture funds.

When these assumptions are true, ProductCart now allows you to manage orders in a safe, productive way, minimizing the chances of processing fraudulent orders, and increasing the level of customer service that you can offer your customers.

1. An order is automatically authorized by a payment gateway (e.g. Authorize.Net), but funds are not captured. Therefore the order is still *Pending* according to ProductCart. The customer does not receive a confirmation e-mail, but rather only an *Order Received* message.
2. The store administrator can verify the legitimacy of the order before processing it. For online stores that experience a high rate of fraud, this ensures that fraudulent orders are not processed. If the order is fraudulent, it can be easily cancelled (and manually voided through the payment gateway). Sometimes fraudulent orders are successfully authorized by the payment gateway (e.g. credit card and billing information was stolen).
3. The store administrator can verify the accuracy of the order before processing it. For example, this allows the store administrator to easily handle a scenario in which a customer realizes to having placed an order incorrectly and quickly sends a follow up email instructing for changes to the order. It also allows for scenarios in which shipping charges were not calculated (or not calculated correctly), for instance, and need to be changed. There are endless other scenarios in which the administrator may need to edit

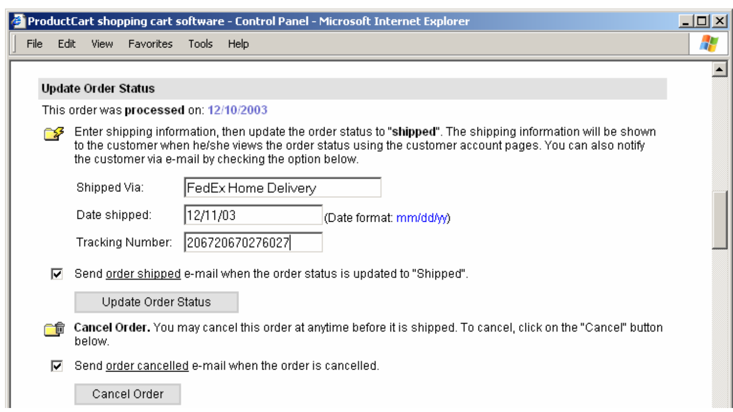
the order before it is processed, and the corresponding amount captured by the payment gateway.

4. Note when the **order amount** that had been previously authorized **is changed** before batch processing the order, regardless of whether the orders total is higher or lower than the original amount, the following occurs:
    - ProductCart will contact the payment gateway and void the initial transaction.
    - A new transaction takes place. Authorize.Net maintains the same transaction ID for the second transaction. Payflow Pro issues a new transaction ID. Note that for this process to take place, all transaction information, including credit card details, are resubmitted to the payment gateway by ProductCart during batch processing. ProductCart stores credit card information in an encrypted format. Credit card information is not stored in the database when the payment gateway is set to immediately capture funds (orders cannot be edited in that scenario).
    - If the new <u>order amount is lower</u> than the original order amount:
        - Payflow Pro will not authorize the amount again, but rather capture it right away. In this scenario, the authorization ID remains the same as the original one and the funds will be captured.
        - Authorize.Net will obtain a new authorization for the new order amount. A new authorization ID is therefore associated with the transaction.
    - If the new <u>order amount is higher</u> than the original order amount, both payment gateways behave in the same way, which is to void the original transaction and obtain a new authorization. The authorization ID is different for this new transaction. Note that the funds authorized during the initial transaction (order total before it was edited) are <u>not</u> released upon authorizing the second transaction, but rather after the transactions are settled for the day. For large orders, this could trigger an unsuccessful authorization of the second transaction if the total of the two orders exceeds the available credit on the credit card. If this happened, the order would not be successfully batch processed. You would have to manually capture funds using the payment gateway's administration area, and then manually process the order in the Control Panel using the *Process Order* page.
    - If the authorization is successful funds are captured and the order's status is updated to *Processed* in the Control Panel.
5. Once the order has been edited, it can be batch processed together with other orders. At that time, the funds that had previously been authorized are now captured (except for the scenarios mentioned above), and the order's status is updated to *Processed* in the Control Panel. Please refer to the *Processing an Order* section of this chapter to better understand what occurs when an order is processed.

Shipping or Batch Shipping Orders

In order to ship an order, the order first needs to be processed. Once an order's status has been changed to *Processed*, the *Update Order Status* section of the *Process Order* page will display three new fields, which allow you to provide your customer with shipment details.

- Shipped Via. Enter the shipping service used for this shipment (e.g. UPS Ground).
- Date Shipped. Enter the date on which the order was shipped.
- Tracking Number. Enter the tracking number for the shipment, if any. On the order details page in the customer's account area, ProductCart will automatically display the tracking number as a hyperlink that points to the shipping service provider's tracking Web page. For example, if the customer selects UPS Ground as the shipping service during checkout, ProductCart will automatically link the tracking number to the UPS tracking Web site.



To change the order status to *Shipped,* click on *Update Order Status*. You have the option to notify the customer via e-mail or not. If you do, the "Order Shipped" e-mail will be sent. The copy that accompanies the shipment details can be edited using the *E-mail Settings* area of the Control Panel.

If you need to ship multiple orders at once, ProductCart allows you to **batch ship orders**. This feature can help you add shipping information to *processed* orders in a much faster way. To access this feature select *Batch Ship Orders* from the *Manage Orders* menu. A list of orders whose current status is *processed* will be displayed.

- You can include an order in the batch by checking the *Ship* option.
- Check or uncheck the *E-mail* option to send the *Order Shipped* email to the customer
- Enter a shipping method (optional), a date (it's pre-filled with today's date), and a tracking number (optional).
- Click on *Ship Selected Orders* to ship the orders you have checked on the page.

If you ever need to update shipping information previously added to an order, you can do so by changing the field values in any of the three fields mentioned above. At that point you will have the option to resend an "Order Shipped" e-mail to the customer. The updated shipment details will also be shown on the order details page in the customer's account area.

How to Charge Off-line Credit Card Transactions

For more information about off-line credit card transactions, see that section under *Payment Options*. This section assumes that your store uses offline credit card transactions as a payment option and focuses on how to process those orders.

As mentioned above, all offline credit card orders are labeled *Pending* by ProductCart as you have not yet received payment for them. After locating a pending order, click on the *View & Process* to view the order details on the *Process Order* page.

Credit card information captured during checkout is included in the *Payment Information* section of that window. You can now charge the credit card using your POS terminal, software that may be installed on your PC, or any other system.

When the transaction is approved, you can change the status of the order from *Pending* to *Processed*. Please refer to the *Processing an Order* section of this chapter to better understand what occurs when an order is processed.

To ensure data security, all credit card information collected from your customers during non real-time credit card transactions is stored in the store database in an encrypted format. It is decrypted *on-the-fly* only on the *Process Order* page. If you download the ProductCart store database (an MS® Access database) you will not be able to read credit card details. Also for security reasons, credit card information is never included in an order confirmation e-mail.

For additional security, make sure you access the ProductCart Control Panel using the HTTPS protocol. To do so, simply log into the Control Panel from (1) instead of (2).

(1) Secure access page: https://www.yourstore.com/productcart/pcadmin/

(2) Non-secure access page: http://www.yourstore.com/productcart/pcadmin/

Visit the ProductCart Developer's Corner for ways to enforce the use of HTTPS when loading any Control Panel page.

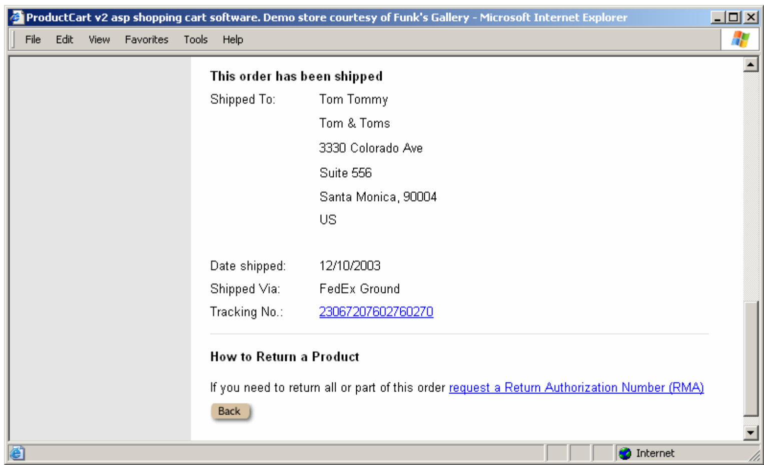
> **Note**: When users submit their orders, they will simply select "Credit Card" from the payment option drop down menu on the check out page. They will not know whether credit cards are processed online (real-time) or off-line on your store.

> **Note**: If you are using offline credit card processing, it is particularly important that you ensure the security of your MS® Access database (does not apply if you are using MS® SQL). Even if credit card information is stored in the ProductCart database in an encrypted format, you should take extra precautions to ensure that the database cannot be downloaded, thus preventing a hacker to try to crack the encryption algorithm and obtain credit card data. Please see Appendix E for more information about securing your database.

Managing Returns

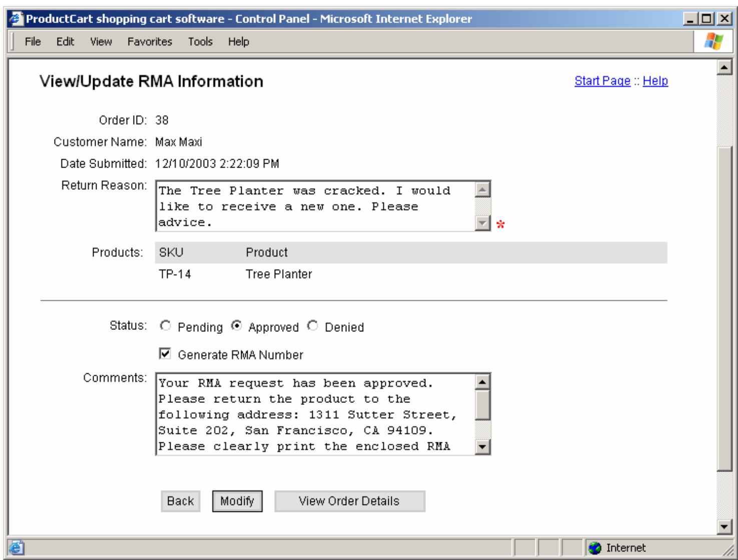
ProductCart contains a sophisticated module to handle product returns. The system now supports partial or full returns, and allows the customer to be directly involved in the process. Specifically, returning an order now includes the following steps.

- A customer requests a return authorization (RMA – Return Manufacturer Authorization). After an order has been shipped, the order details page in the customer's account area displays a link to request a RMA, as shown below. The text shown, as always, can be edited as explained in Appendix C.

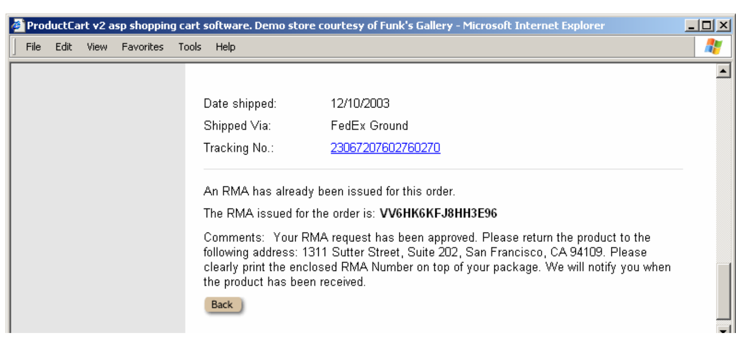


- When requesting a RMA, the customer can specify which products he/she would like to return, if the order included more than one product. The customer can elaborate on the reason for the return. The customer is not immediately given an RMA number to use for the return, but rather will have to wait for the store administrator to review and approve the RMA request. This will allow you to decide whether the return falls within the terms of your return policy, for example.

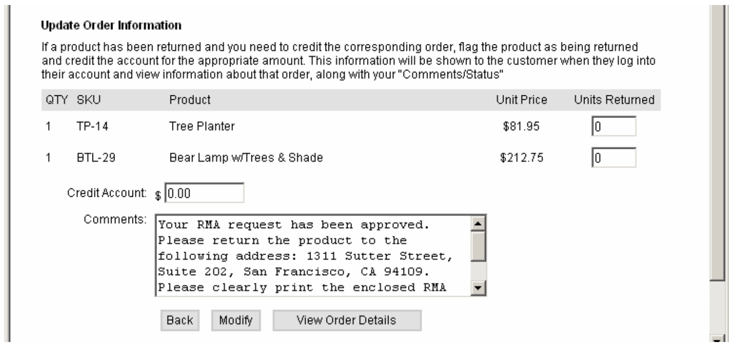
- The store administrator is notified via e-mail that an RMA request has been submitted. At that time, the store administrator can view details about the RMA request by logging into the Control Panel and clicking on the *View RMA Information* on the *Process Order*. At the top are details about what the customer would like to return and why. In the lower section of the page are tools to manage the RMA request.
    - o By default the *Status* of the RMA request is *Pending*. You are change it to *Approved* or *Denied*.
    - o If you approve the RMA request, check the option *Generate RMA Number*. A random number will be shown to the customer on the order details page of the order for which the RMA request was submitted, together with your *Comments*.
    - o Click on *Modify* to update the RMA information. The order details page in the customer's account area is automatically updated with the same information. Note that an e-mail is sent to the customer notifying him/her of the update.



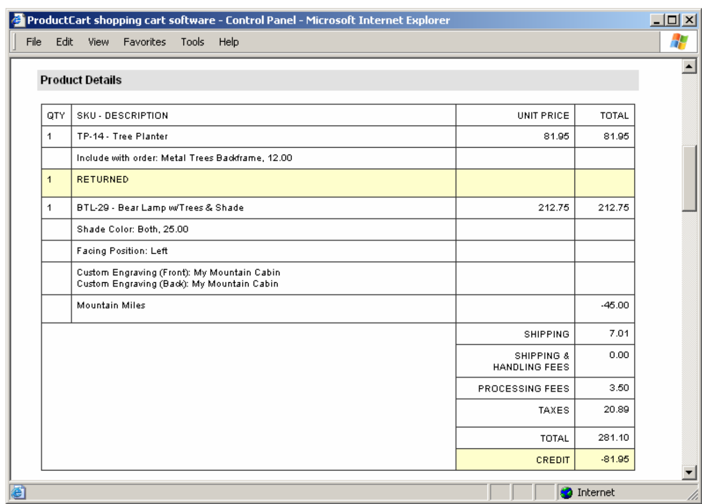
- The customer is updated of the status of the RMA request both by e-mail and through the order details page accessible from the customer's account menu. If the RMA request is approved, the customer is automatically provided a RMA number, together with the store administrator's instructions on how to return the product(s).



- Once the returned products are received, the store administrator can decide whether to post a credit to the customer's account, and add related comments. To do so, return to the *View/Modify RMA* page, enter the number of units being returned and the total amount to be credited.



- If a credit is issued, the order details page in the customer's account area is once again updated with the credit, if any, and the related comments. The *Process Order* in the Control Panel is also updated as shown below, reflecting information about which products were returned, and the amount credited to the order.



Additional notes about managing returns:

- When customers submit a partial return, they cannot submit another RMA request for the remaining of the order. Only one RMA can be issued automatically through the Control Panel through the Control Panel.
- When a credit is issued, inventory and order status are <u>not</u> updated. The rationale for not automatically readjusting inventory levels is that the products that are being returned by the customer may be damaged. The rationale for not automatically changing the order status to *Return* is that this may be a partial return. If all products have been returned, you can manually change the order status to *Return* from the *Process Order*, using the *Reset Order Status* drop-down menu located in the middle section of the page.

Purging Credit Card Numbers

As mentioned earlier in this chapter, ProductCart only saves credit card numbers to the store database, in an encrypted format, in the following three scenarios:

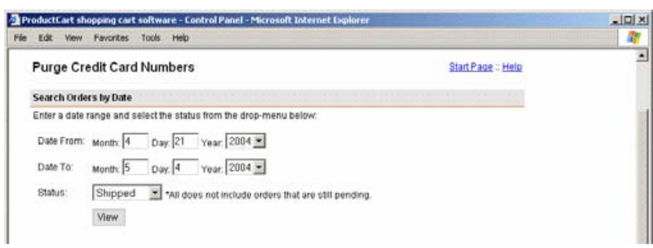
1. When you are using offline credit card processing.
2. When you are using Authorize.Net in "AUTH_ONLY" mode.
3. When you are using VeriSign Payflow Pro in "Authorization" mode.

If your store is using one or more of the above-mentioned payment options, then encrypted credit card numbers have been stored in the database. ProductCart v2.6 and above allow you to take a further step towards protecting your customers' confidential information by including a feature that deletes selected credit card information from the database. From the *Manage Orders* menu, select *Purge Credit Card Numbers*.

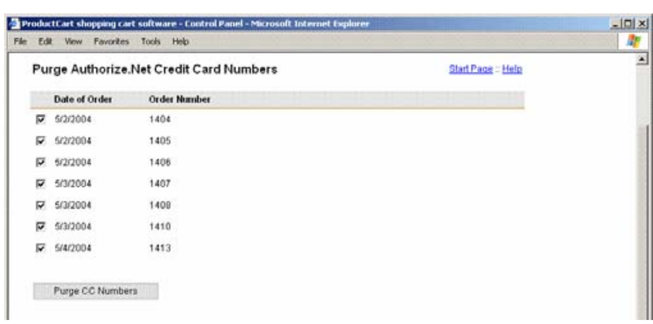
We recommend that you periodically purge these credit card numbers from the database. As a rule of thumb, you should purge all credit card numbers that are associated with orders for which your store's return policy, and therefore the customer's right to ask for a refund, has expired.

When you purge the credit card number associated with an order, ProductCart will replace all but the last 4 digits of the card number with the character *. ProductCart will also delete the CVV information, if any.

To purge credit card numbers from your store database, select one of the available three links: Offline credit card processing, Authorize.net, or Payflow Pro.



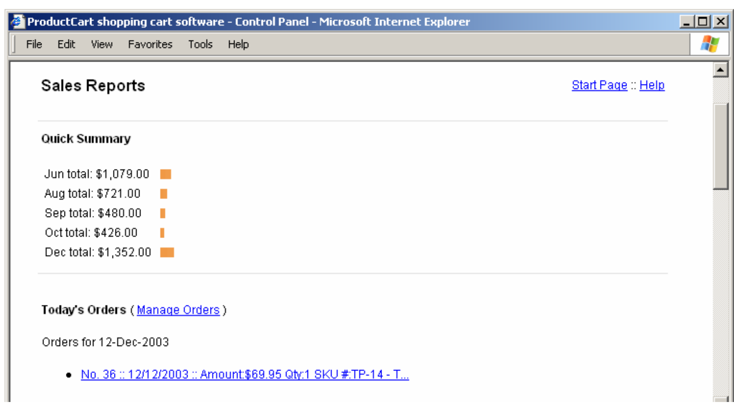
On the following page, enter a date range and select an order status (if the drop-down is shown). Then, choose which orders you would like to include in the process and click on the *Purge Credit Card Numbers* button. Note that this action cannot be undone.



Chapter
12

Generating Reports

Generating reports helps you keep track of your store sales, view customer activity, and integrate with other applications by exporting order details. You can generate a variety of reports, and export selected fields in MS Excel or comma separated format for use with other applications, such as your spreadsheet or accounting software. Pending orders, and orders that have been either cancelled or returned, are not included in any of the reports mentioned below. They are included when exporting order information.



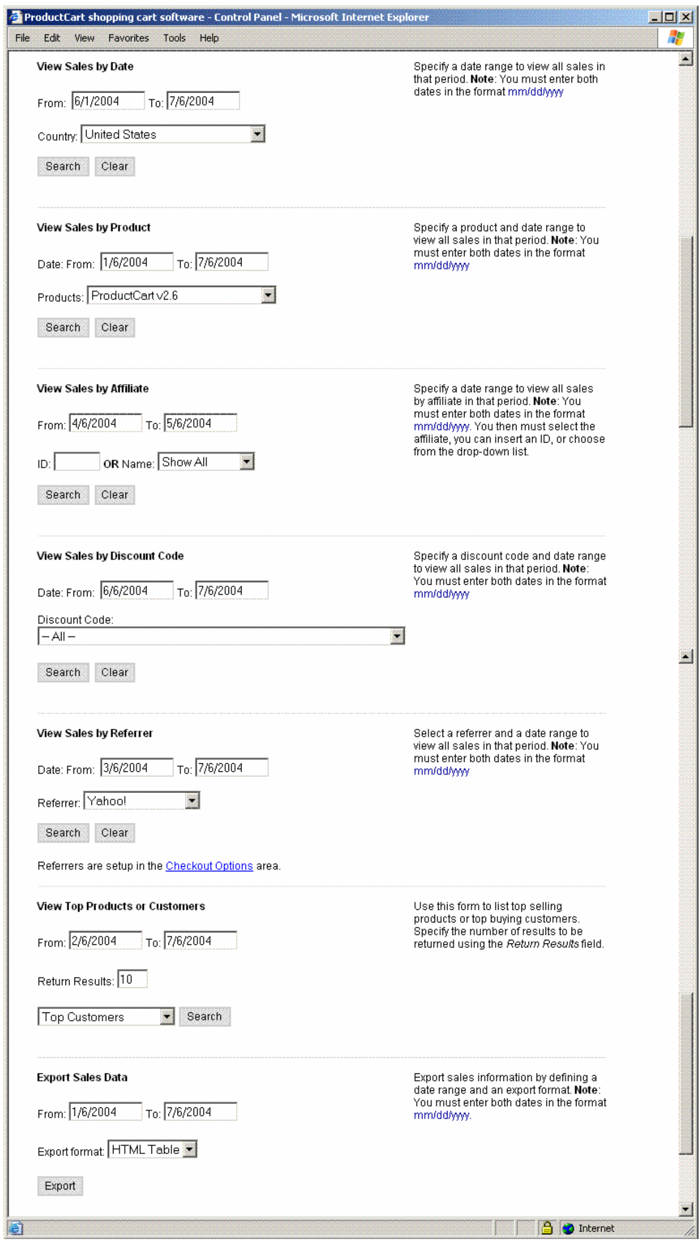
Generating Sales Reports

To view sales reports for your store, select *View Sales Reports* from the *Reports* menu. The window that is displayed provides the following information:

- **Quick Summary**. The quick summary provides monthly store sales for the current year. If your store has been in business for more than one year, you will be able to access monthly sales reports for each of the previous years. They will appear in a separate pop-up window.
- **Today's Orders.** A list of the orders for the day. Click on any order to view its details and process it.
- **Filters**. A number of filters allow you to generate a variety of detailed sales reports: sales by date, product sales, sales by affiliate, referrer, or discount code, reports on the top selling products and customers, and more. You can also export sales data to HTML, a CSV file, or a MS Excel file (only if your server has MS Excel installed).

To **View Sales by Date** enter the "from" and "to" dates in the appropriate fields, select a *Country* if you want to limit the report to sales in a particular country, and click on the *Search* button.

ProductCart will generate a report that includes the following information: date the order was received, customer, referrer (if any), order amount, tax charged, type of discount used and amount (if any), and date the order was processed. Totals are also included. Click on the order number to view more details on that order, or click on the customer name to view other orders by that customer.



To **View Sales by Product** enter the "from" and "to" dates in the appropriate fields, select a *Product* if you want to limit the report to sales for a particular product, and click on the *Search* button. ProductCart builds two different reports based on whether or not you select a specific product to report on. If you do, ProductCart will show a list of orders that included the selected product. If you don't, ProductCart will show a summary of product sales for the period, including the total number of units and total amount sold for each product.

If you are using affiliate Web sites to increase sales on your store, you can generate a report that shows sales by affiliate, and indicates the total commissions owed to an affiliate. To do so, specify a date range under **View Sales by Affiliate**, then enter the affiliate ID or select an affiliate from the drop down menu. Select *View All* to show sales referred by any affiliate. A list of sales referred by the selected affiliate will be displayed, together with the affiliate's commission.

To view reports of how many orders where placed by using a specific discount code, use the **View Sales by Discount Code** filter. You can opt to view a report on usage of a specific discount code over a certain period of time, or you can have ProductCart build a report that include all discount codes used in that period. In both cases, the report includes total sales together with a list of orders for which the discount code was used.

The **View Sales by Referrer** report allows you to list orders placed by customers who listed a certain referrer during checkout. Note that this report is only available on stores that are using the referrer feature, which can be configured in the *Checkout Options* section of the Control Panel. Also note that repeat orders are not included in the report. This is because the referrer information is added to an order only to the first time an order is placed by a customer, and not to subsequent orders placed by the same customer.

ProductCart also allows you to generate reports for your store's **top selling products** (within a data range), **top selling customers** (within a date range), and top viewed products (you may not specify a date range for this report as date information is not stored in the database when a product is viewed). To obtain these reports:

- Enter a date range, when this option is available.
- In the *Return Results* field, enter the number of results that you would like to be displayed on the results page (e.g. 10, 15, 20, etc.).
- Then, from the drop down menu select the type of report that you would like to generate. The choices are: top selling products, top viewed products (the products site visitors look for the most, even if they may not buy them), and top customers (the customers that have generated the most sales for you).
- Click on the *Search* button to generate the report. These reports are based on all orders placed on your online store since its opening.

In addition to generating reports that you can view through your browser, ProductCart allows you to export information so that you can import it into other applications (e.g. MS® Excel) and generate reports that better fit your needs.

Exporting Order, Customer, Affiliate, and Product Data

ProductCart allows you to export predefined sales information or create your own custom reports. In both cases, you can export the information in HTML, CSV, or MS Excel format. MS Excel will be shown as an available option only if ProductCart is able to successfully detect the presence of the application on the server. If MS Excel is not installed on the server, this option will be hidden.

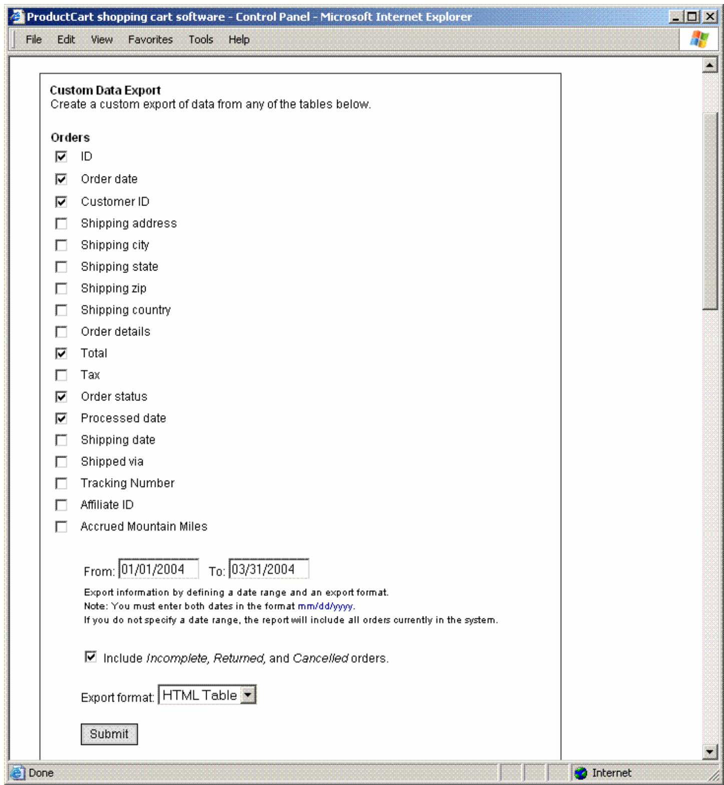
To **export predefined sales data** follow these simple steps:

- Select *View Sales Reports* from the *Reports* menu. Under *Export Sales Data* enter the "from" and "to" dates in the appropriate fields. Note that the dates must be entered in the following format: mm/dd/yy.
- Then select the format in which you would like the data to be exported using the *Export Format* drop down menu. The choices are: HTML table (the results are displayed in a browser page), CSV format (a comma-delimited file that you can download), or Excel.
- Click on the submit button to generate the report.
- If you opted for the CSV or Excel format, you will be shown a pop-up window with a link to download the file. To download the file, click on the download icon and choose a location on your computer in which to save the file. Or, right click on the download icon and choose *Save Target As...* from the context menu that will appear.

To **export custom reports** follow these steps:

- Select *Custom Data Export* from the *Reports* menu. You can export 4 sets of data:
    - Order information
    - Customer information
    - Affiliate information
    - Product information
- To generate a report, select the fields that you want to export from the store.
- Then select the format you would like the data to be exported in using the *Export Format* drop down menu. The choices are: HTML table (the results are displayed in a browser page), CSV format (a comma-delimited file that you can download), or Excel. Remember that if MS Excel is not installed on the server, this option will be hidden.
- If you are exporting order information, enter a data range. If you don't, all order data will be exported. You can also specify whether or not incomplete, cancelled, and returned orders should be included in the report.
- Click on the submit button to generate the report. If you are exporting to HTML, the information will be shown in your browser. Depending on the amount of data that you are exporting, it may take some time for the report to be generated. If you are exporting to CSV or Excel, a file will be generated and saved to the server. The confirmation page will include a link to the file. If you receive an error message, this is often due to folder permissions not being properly set. In this particular case, the file is saved to the

"pcadmin" folder on your Web server, which must have "write" permission for the task to complete successfully.



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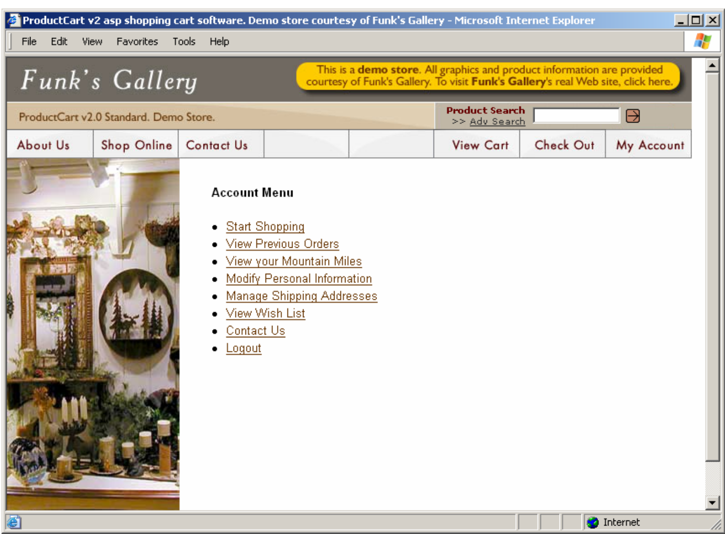
Chapter 13

Customer Service on Your Store

Your store automatically provides your customer with dynamically updated information regarding their past orders. It also allows them to view order details in a printer-friendly format, repeat an order, and post comments or upload files related to an order. In addition, it contains features to let them edit their account information, add and edit multiple shipping addresses, and use the "Wish List" feature of ProductCart, if you enabled it.

Customers of stores that use the Build To Order version of ProductCart have also access to previously saved quotes on configurable products.

If a customer needs to return a product, they can request a Return Authorization Number from the order details page. They can also contact the store administration by using the built-in contact form, and much more.



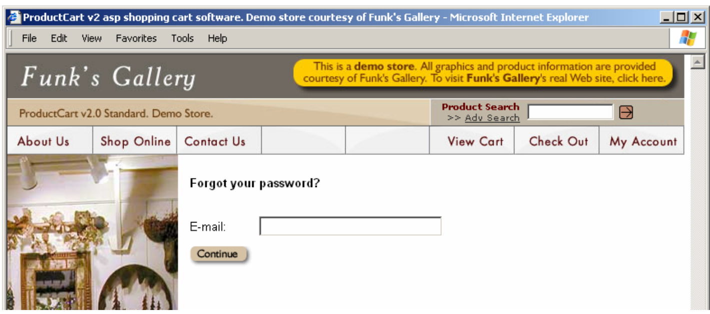
The Customer Account Area

It is a good idea to provide your store customers with easy access to their account area. For example, you could place links to this section of your store on your Web site's main navigation (e.g. "Customer Service") or from the customer service area of your Web site, if you have one. Use the following link to load the login page (use https if an SSL certificate has been installed on your server), or take an already logged in customer to the customer account menu:

http://www.yourStore.com/productcart/pc/custva.asp

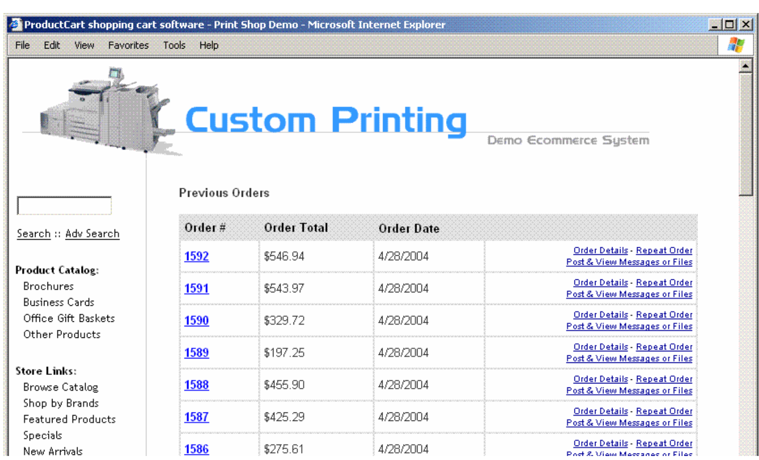
To log into their account, your store visitors will have to first register with your store. Then, at any time, they can access their account by simply entering their user name (which is their e-mail) and their password on the login page.

If they forget their password, ProductCart includes a handy password reminder that will automatically send the password on file to the e-mail address that the customer provides. If the customer enters an e-mail address that in not on file, a corresponding message will be displayed. The password reminder can be easily accessed from the login page.



From the customer service area, your customers can:

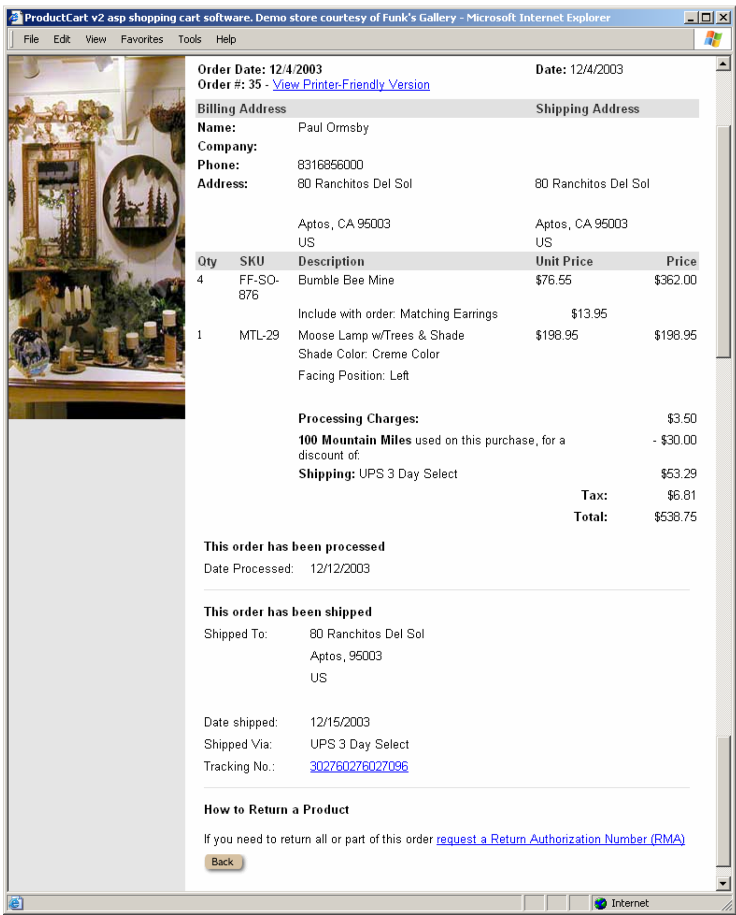
- **View previous orders**. A list of previously placed orders is displayed. Orders are sorted by date, starting with the most recent. The order number, order date, and order total are shown on the *Previous Orders* page. If the order nicknaming feature has been turned on in the general store settings area, the order name is also shown. On the right side, customers will find the following three links.
    - Order Details – Gives access to details about the order, including updated order status and a link to a printer-friendly version of the order.
    - Repeat Order – Allows the customer to re-add to the shopping cart the same products that were purchased as part of that order. This is can be time saving feature for repeat customers (e.g. customer repeatedly buys same office supplies). If prices changed since the first order was placed, they are automatically updated.
    - Post & View Messages or Files – Gives access to the integrated Help Desk.



- **Track the status of a recent order**. When customers view a previous order, ProductCart displays a full summary of all order details: products, discounts, shipping charges and handling fees, Reward Points used or accrued, taxes, etc.. A link to viewing the order details in a printer-friendly page is also provided.

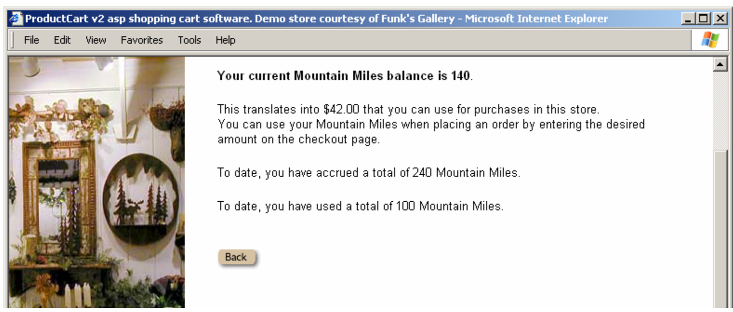
  Below the order details, the order status is displayed (pending, processed, shipped, returned, or cancelled). As the status is changed in the Control Panel, information is updated accordingly in the customer service section. When an order is shipped, for example, the customer will be able to see how and when the order was shipped, and obtain the tracking number, if available.

  If the store is set up to use the UPS Online® Tools, customers will be able to track orders shipped via UPS directly from the *View Previous Orders* area. As a store administrator, make sure to include their UPS tracking number when you update the order status from *processed* to *shipped*. For more information, see the *Shipping Options* chapter.

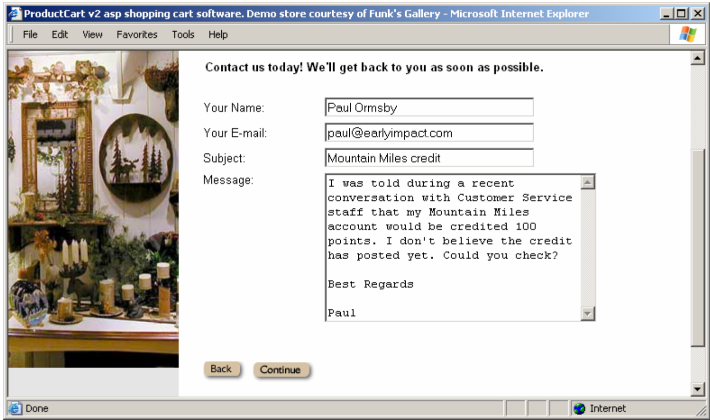


- **Modify personal information**. Here is where customers can edit their general account information and billing address. Customers can also opt in or out of your newsletter subscribers' list, if you have enabled that feature using the *Checkout Options* are of the Control Panel. Even if they used a credit card to place a previous order, for security reasons their credit card information is not shown on this page. For more information about when and how credit card information is stored by ProductCart, see the *Payment Options* section of this manual.

- **Manage shipping addresses**. Customers can maintain multiple shipping addresses, and select any of them during checkout. Note that they will be able to use alternative ship-to addresses only if you have enabled that feature in the *Shipping Options > Shipping Settings* area of the Control Panel. Also note that only one address can be used for each order. In other words, customers cannot ship one item to an address and another item to a second address, when the items are part of the same order.
- **View accrued Reward Points**. This feature is available only on stores where the Reward Points system has been activated. For more information, please see Chapter 5 of this User Guide.



- **View wish list**. If the *Wish List* feature of ProductCart is enabled on your store, customers can add items to their *Wish List* when browsing your catalog, instead of purchasing them. This allows them to virtually "save" a list of items in which they are interested, but not ready to buy at that time. They can later view the list and add any of the items to their shopping cart by logging into the customer service area and viewing their *Wish List*.
- **View saved quotes**. This feature is only available to users of ProductCart Build To Order. It allows customers to view, edit, submit, or turn into an order previously saved quotes. Customers can save configured products to a quote if the store administrator has activated that feature. For more information, see the section of this User Guide dedicated to the *Build To Order* module.
- **Contact us**. ProductCart includes a handy contact form that allows customers to send a message to the store administrator, not necessarily related to an order. If the message is related to an order, customers can use the integrated Help Desk.



- **Log out**. By clicking on *Log Out*, a customer forces the store to "forget" who he/she is. The customer will then have to either log in again, or register as a new customer. Closing the browser also logs a customer out of the store.

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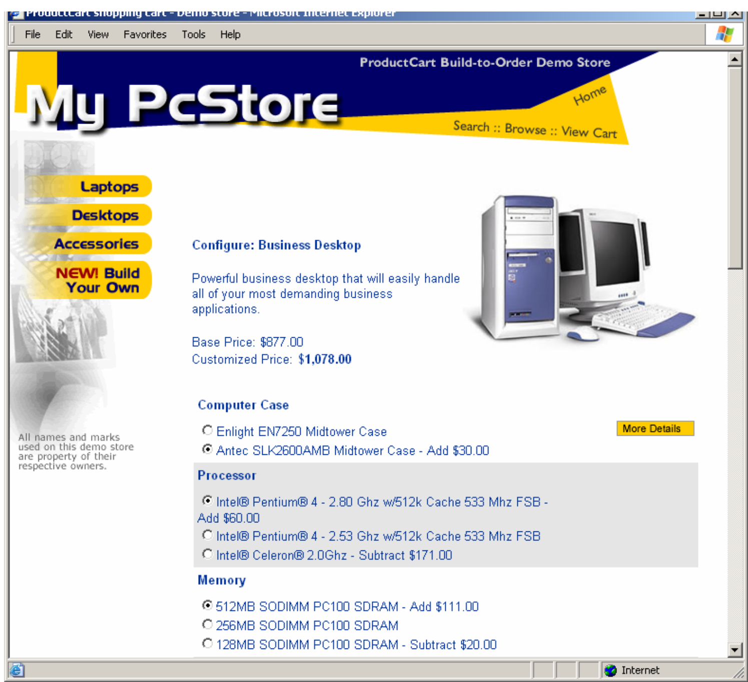
Chapter

14

ProductCart Build To Order

ProductCart's Build To Order module (also referred to as BTO throughout this document) allows merchants to create and manage a sophisticated online shop where customers can dynamically configure products & services while they are creating quotes or ordering them. What is completely unique about BTO is the fact that it combines an ecommerce system with an online product (or service) configurator. Depending on how it is setup by the store administrator, the system allows customers to do any of the following:

- View a default configuration for a customizable product or service, created by the store administrator using the Control Panel, then purchase the product "as is" or customize it.
- Edit the default configuration by choosing from options assigned to the selected product or service by the store administrator. Available options may be displayed in a variety of ways using drop-downs, radio buttons, or check boxes. Specific instructions may be shown for each category of selectable options, to help the customer configure a product.
- Save a quote, then edit it, print it in a printer-friendly format, submit it to the merchant for review, or turn it into an order.
- Place orders.



Overview

The Build To Order version of ProductCart sets this shopping cart apart from any electronic commerce software available today to small businesses, and places the product a step above its competitors. ProductCart Build To Order is the only ecommerce system that combines a shopping cart, a product configurator, and an online quoting module in a small business-friendly system that can be managed entirely by non-technical staff, and can be easily integrated with an existing Web site.

Until Build To Order was released, the only way for businesses to sell configurable products and services online was to have a custom e-commerce application built for them — an expensive and time consuming proposition, often outside of a small business' budget.

ProductCart with Build To Order (ProductCart BTO) fills this gap, providing advanced e-commerce functionality within a small business' budget. The software allows small- and medium-sized businesses to receive orders and provide real-time quotes for complex, customer-defined products and services, while maintaining the ability to sell standard, non-configurable items.

A computer shop owner, for example, will now be able to build and manage a store, out-of-the-box, that can handle at the same time the sale of predefined products (i.e. hard drives, monitors, printers, etc.), partially defined products that require some features to be chosen by the customer (i.e. *"Family Desktops"* and *"Road Warrior Laptops"*), and products that are fully customer-defined (*i.e. "Build your PC from scratch*").

Applications & Sample Stores

Online computer stores that sell custom-built PCs are just one of the many applications of ProductCart Built To Order. Other industries that have shown a clear need for this system include: industrial machinery, complex consumer products (e.g. custom built barbecues, furniture, air conditioning systems, gift baskets, etc.), printing services, catering services, Web design and Web hosting services, and many others.

The following is a series of hypothetical scenarios that are hard if not impossible to handle with a standard e-commerce application, but that ProductCart BTO can handle quickly and effectively. Note that all names and references to products and places are fictitious, although ProductCart has indeed been successfully implemented in very similar circumstances.

1. Catering

Moonlight Dinners offers catering services for private and corporate parties. Taking orders over the phone is time consuming and open to misunderstandings, and the company is considering taking its business online to streamline order processing and possibly generate additional visibility and business.

Due to the complex nature of the product that it sells (catered dinners), Moonlight Dinners cannot use a standard shopping cart application. How many courses? Which dishes? In what quantity? What type of silverware? Do you also need entertainment? And how about flower arrangements? When's the event date & time? In addition, the menu changes depending on whether customers are ordering a catered lunch or dinner, something that needs to be reflected in the ordering process.

ProductCart's Build To Order Module allows Moonlight Dinners to easily set up its "products" (i.e. dinners, lunches, parties, etc.) as customer-chosen combinations of predefined items. During the ordering process, customers select from a variety of categories (i.e. entrees, desserts, beverages, silverware, etc.) specific items (i.e. cheesecake, carrot cake, etc. from the "Desserts" category) to dynamically "configure" the catered dinner that best fits their preferences. The price for the catered event changes dynamically, based on the number of guests and the menu selections, without the need to refresh the page. The total price automatically includes any quantity discounts that apply to any of the selections. The price for optional entertainment selections (e.g. Jazz pianist) and flower arrangements does not change regardless of the number of guests.

The customer is then asked to specify a date and time for the event during the checkout process. A pop-up window clearly displays blackout dates that are not available for selection.

Thanks to ProductCart, Moonlight Dinners can easily bring its business online.

2. Printing Services

Quality Printing offers a vast array of printing services. Quality Printing knows that bringing its business online would increase visibility for its offerings and likely generate incremental revenues. However, the company cannot use a standard shopping cart application due the nature of what it sells: services that the customer configures at the time of the order, or for which the customer requests a quote before purchasing.

All the e-commerce applications that Quality Printing found on the market, and that fit in its budget, did not provide the ability to handle custom quotes. With ProductCart's Build To Order Module , Quality Printing can offer its customers any number of printing options (i.e. paper type, cover type, binding type, number of colors, number of copies, delivery option, etc.), and let them configure a custom order online. For some of the available services, prices are not shown as the company needs the system to behave strictly as an online quoting tool. Customers configure what they need, save a quote, and then submit it to the store. A Quality Printing representative then follows up and discusses pricing over the phone.

Thanks to ProductCart, Quality Printing can now easily bring its business online, streamline and automate some of the order processing, and consequently increase its operating margin.

3. Custom-Built Computers

FastComputers assembles desktops, laptops and servers for small businesses in the Los Angeles area. The company decided to try to automate order processing to make it less human resource intensive and reduce the chance of committing mistakes. FastComputers' computers are typically configured by the buyer, as the company focuses its business on affordable, custom-built PCs.

FastComputers began looking for a prepackaged e-commerce solution that would fit its needs and its $1,500 budget, but found nothing. Then, the company considered hiring a Web development company to have them create a customized solution, but discovered that the project would exceed its budget by several thousands dollars. As a result, FastComputers decided to put the project on hold.

With ProductCart Build To Order, FastComputers can now execute its strategy quickly, easily and cost-effectively. ProductCart's flexible catalog allows the company to partially pre-define some of the items (i.e. operating system, motherboard, etc.), and then let its customers configure all remaining options (i.e. memory, hard-disk size, CD-ROM & DVD drives, etc.). FastComputers can sell ready-to-ship computers (non-customizable), partially configurable systems, and computers that the customer can create "front scratch".

Thanks to ProductCart Built To Order, FastComputer can also increase sales by offering a full range of parts and accessories, and use the same product catalog to do so. The same computer hard drive could be included both as a selectable option for some of the configurable systems, and as a stand-alone product. The price could be different in the two scenarios.

4. Gift Baskets

Deluxe Foods sells specialty foods both through their retail store and on the Internet. One of unique services that Deluxe Foods offers to its customers is custom gift baskets. Especially around the holidays, that's their biggest seller.

Unfortunately, their online store cannot take orders for custom gift baskets because there is no way for the customer to select which products he/she would like to put in the basket. This not only limits the online store's sales, but also forces Deluxe Foods to keep taking orders over the phone, which is time consuming and hard to do, especially when the retail store gets busy.

ProductCart Build To Order can solve the problem. Customers can easily put together the exact gift basket that they had in mind by selecting products from Deluxe Foods' vast selection. As their selections vary, the price changes in real time. Discounts are also automatically calculated: the store can offer price breaks on certain items when purchased in multiple quantities. A pop-up window shows customer all the discount details.

On the second page, customers select special gift wrapping options and "rush order" surcharges.

The total weight of the gift basket is automatically computed as the sum of all selected options, and shipping is properly calculated by taking into account that the gift basket is an "oversized" item.

This next holiday season, the company will spend a lot less time taking complex orders over the phone or via fax.

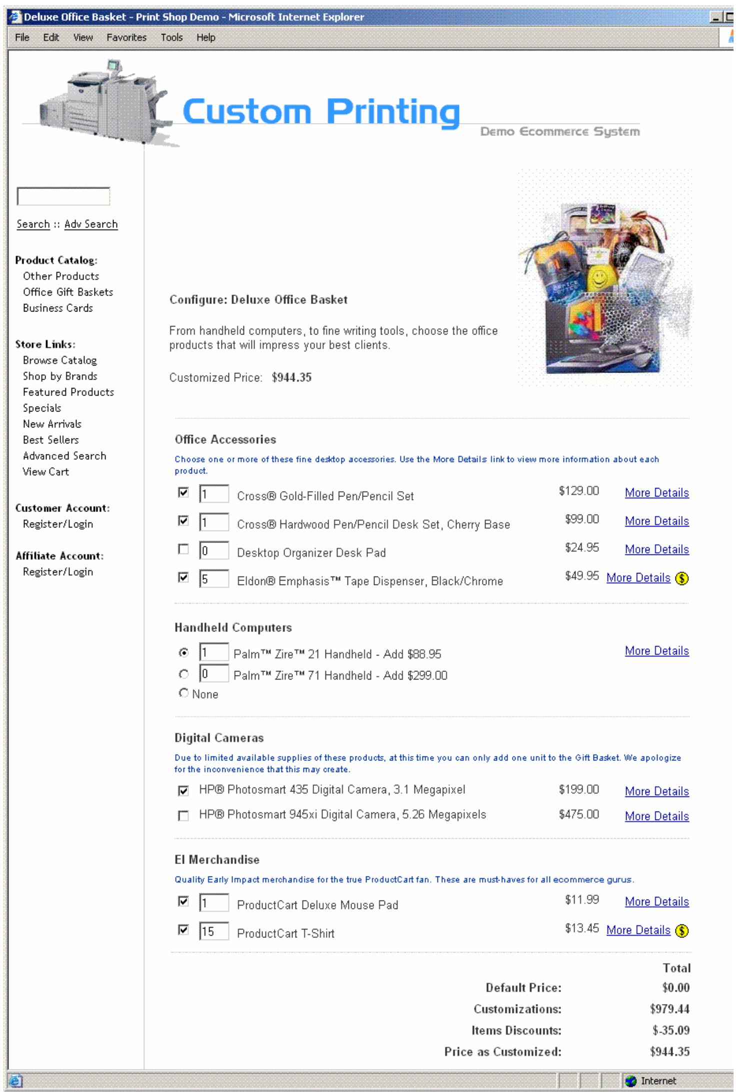
The examples above have likely given you an idea of what can be accomplished by using ProductCart Build To Order. To help you gain a hands-on understanding what you can do with BTO, Early Impact has recently added new, fully functional demo stores to its Web site[8].

- A custom computer shop. When you visit this demo, note how some computer systems can be built from scratch, whereas other systems are partially pre-configured and can be

[8] Note that prices, product names, and product descriptions are completely fictitious on these stores, and that the number and type of demo stores featured on the Early Impact Web site may change over time. In addition, please note that although the databases behind these sample stores are reset on a regular basis, these demos are fully functional and therefore they are modified during the day by other existing or prospective ProductCart users who may change many of the store settings. Sometimes this results into the stores not functioning properly ☺

either purchased "as is" or customized. Try saving a quote for a system, then come back at a later time to modify the quote, and turn it into an order.

- An online print shop. Try placing an order for custom business cards. Note how the unit price for certain selectable options (e.g. type of paper, number of colors, etc.) changes dynamically as the purchased quantity is changed. In addition, note how the second step of the product configuration process consists of selecting items whose price does not change regardless of the quantity purchased. (e.g. film setup charge, rush order charge, etc.). These selectable options are not a function of the quantity ordered: they remain the same regardless of whether you order 500 or 5,000 business cards. This is one of the new, powerful features include in ProductCart Build To Order v2.6 and above, and it gives you a tremendous amount of flexibility when setting up a configurable product or service.



On the same demo store, try placing an order for the "Deluxe Office Basket" and notice how a quantity field is shown for some selectable items, but not others. Also notice how some items have a yellow discount icon next to them, indicating that certain quantity discounts apply to those items (click on the icon to view the discounts in a pop-up window). In addition, you will see that no default configuration has been set for the product, which forces customers to go through the configuration steps (i.e. the product cannot be purchased "as is").

- An online catering business. Try saving a quote for a custom wedding reception. On the first page of the service configurator, choose the dinner menu. Change the number of guests and notice how everything is recalculated dynamically, without refreshing the page, including quantity discounts that are available for selected menu items. Then, on the second page, choose additional services such as a jazz band or a photographer, and notice how the cost associated with these services does not change regardless of the number of guests specified on the first page. Save a quote and view a printer friendly version of it.

Written entirely in ASP (Active Server Pages), ProductCart Build To Order can also be used as a platform on which to build custom ecommerce solutions. In fact, many businesses around the world have been able to substantially reduce their software development budget by using ProductCart Built To Order as a starting point for creating personalized ecommerce Web sites that share the need for a product configurator as part of the system.

Recently Added Features

ProductCart v2.6 and above contain a large number of significant improvements to the Build To Order module. The new features give you additional levels of flexibility in terms of how your customers can customize their product (or service) during the ordering or real-time quoting process. Among the new capabilities:

1. Associate a quantity field with any selectable item.
   When setting up a configurable product or service, you can now show/hide a quantity input field for any of the options assigned to the product. This is a huge improvement to the product configurator. For example, when ordering a custom gift basket, customers will be able to select how many units they need for any of the products that they are adding to the gift basket, as long as you are allowing them to select more than one unit. Therefore, on the same product or service configuration page, you can have a combination of items that can be added to the configuration in more than one unit (i.e. the quantity field is shown), and items that can only be selected, but for which a quantity cannot be specified (i.e. they can only add one unit to the configuration - the quantity field is hidden).
2. Set quantity discounts for selectable items.
   Depending on the number of units of the configurable product that the customer is purchasing, and/or on the number of units of a specific item added to the configuration, the price of that item can change dynamically based on quantity discount tiers set for it. This powerful feature has a wide range of applications. For example, the unit price of the option "4-Color Printing" may change as the customer decides to purchase 2,000 instead of 500 custom business cards. Change the quantity and everything is recalculated on the fly, without refreshing the configuration page.
3. Quantity-independent additional charges.
   Continuing on the "business cards" example, an order for 500 business cards could be charged the same $150 setup fee that is charged on an order for 10,000 business cards.

Similarly, having a Jazz Band at a wedding reception would cost $1,500 regardless of the number of guests. The price of the "dinner" portion of the wedding reception, however, does change based on the number of invited guests. ProductCart Build To Order now allows you to include in the product or service configuration items that add a set amount to the order total, regardless of the quantity ordered. You can associate N such items with the configurable product or service and organize them in meaningful categories. In the storefront, these charges are shown to customers on a page separate from the product or service configuration page. Continuing on the "wedding reception" example, the shopping cart will now allow customers to first configure their dinner (e.g.: appetizers, first courses, soups & salads, beverages, etc.), where the total price is a function of the selected items and the number of guests, then add other items whose price is not affected by the number of guests (e.g. photographer, Disk Jockey, flower arrangements, etc.).

4. <u>Show category-specific instructions on the configurator pages.</u>
   Configuring a custom product or service can be somewhat intimidating to a new visitor to your store. Now you can better guide your customers by showing comments or instructions above each category of selectable options. Especially on complex product configuration pages, this feature will make the ordering process much easier for the customer.

5. <u>Removed configuration limitations.</u>
   The product configurator was further improved by removing existing limitations and by adding new functionality. Specifically: (i) if a category is set up to allow multiple selections, you can now set a default item; (ii) if a category is set to allow for multiple selections, you can now set it to be required.

Build To Order vs. Unlimited Product Options

There is a major difference between the functionality offered by ProductCart BTO and the 'unlimited product options' feature that some other e-commerce solutions provide. 'Unlimited product options' means that the store administrator can associate a product with a variety of available styles, colors, sizes. These options are not 'products' available elsewhere on the store. In other words, they do not 'exist' separately from the product that they apply to. This approach works just fine when the store sells relatively 'simple' merchandise. For example, this approach works great if the store were to sell a pair of khakis, where the options could be: style, color, size, etc.

But this approach does not work nearly as well when the store sells much more complicated items, which are a combination of products available as stand alone items on the store (e.g. hard drives), items not available as stand-alone (e.g. microprocessors), and options (e.g. white or black desktop case).

Another example: let's say your store sells custom furniture (or allows visitors to obtain custom real-time quotes). Finished pieces of furniture are made of wood panels, cabinets, door knobs, countertops, and many other items, some of which may also be available for sale as stand alone items, some of which may not. The final product (e.g. a custom configured kitchen), is the combination of a variety of other products that make up the configurable one. These aren't just options, they are actual products, each with their own price, image, description, weight, etc.

Some of them may be available for sale as stand-alone items, some may not. Regardless, ProductCart BTO gives vendors the ability to combine ANY existing products to create a new, configurable one. In this example, a customizable kitchen may allow the customer to select from 5 of the 10 countertops carried by the store, 4 of 7 refrigerators, all of the wood paneling, etc.

ProductCart BTO gives store administrators far more flexibility than shopping carts using simple product 'options'. To summarize:

- With other carts, Product options are NOT separate products, but rather attributes of a certain product. Therefore, they are NOT available on the store for purchase as separate products.
- With ProductCart BTO, a selectable option (e.g. a hard disk that is part of a custom made desktop computer) can be made available for purchase as a separate product. It's up to the store administrator to decide.
- Because selectable options are actually separate products (part numbers) in the store catalog, the following additional statements are true:
    - The customer can have access to more information on each selectable option (description and images).
    - The total weight of the configurable product is calculated dynamically taking into account the individual weights of the selected items.
    - Different quantities of a selectable item can be added to the product configuration (if the *Show quantity field* option has been enabled for that category of selectable items – see later in this chapter for more information).
    - The price of a selectable item within a product configuration can be updated across all configurable products to which the item has been assigned, from one location (e.g. update the price of certain microprocessors in all the custom computers where they can be selected).. Of course, the price can also be updated on a product by product basis.

Product Database: A New Architecture

In order to be able to implement the functionality described above, ProductCart BTO uses a highly flexible product catalog. Product information is organized as follows.

1. **Standard Products** are products as they exist in the standard version of ProductCart. Standard Products may or may not be available for sale (e.g. a 'coming soon' product is not), but they are always visible in the store catalog. In other words, they always come up in store searches. Standard Products are typically organized in categories that are visible to customers when they browse the store.

   For example: a custom furniture store may sell 'Stools" as stand alone products.

2. **Build To Order Only Items** are products that are not available for sale as stand alone items, and therefore do not come up in store searches. They can be assigned to a category that contains Standard Products as well, or they can be organized in categories that are not visible to customers when they browse the store.

For example: the same custom furniture store may not sell door knobs for kitchen cabinets as stand-alone products, and therefore will not want them to be visible in the store catalog other than as parts of a configurable kitchen.

3. **Build To Order Products** (or Services) are combinations of Standard Products and/or Build To Order Only Items, presented to the user as meaningful groups of selectable options. Some groups may contain single-choice options (e.g. you can only select one of the available monitors for your custom computer), some multiple choice items (e.g. you can select any of the available software programs to be installed on your custom computer). The store administrator defines the groups and the items/products within each group that are available to customers to select from while configuring a certain BTO Product. The store administrator, however, does not actually define how the custom product or service will end up being configured. That's up to the customer as he/she makes selections from the available options.

   For instance, a catering business may offer four Services: "Breakfast", "Lunch", "Dinner", and "Special Events". A "Dinner" would likely include groups of products/items that might not be available for the customer to select with a "Breakfast". The actual content of a "Dinner" is then configured by the customer during the ordering process (i.e. 2 entrees, 2 appetizers, no desserts, wine, etc.). The vendor only defines the choices (groups of products/items) from which the customer can select.

To allow the store administrator to implement flexible pricing strategies, ProductCart BTO treats product prices differently depending on whether a product is or is not part of a configured BTO Product. Specifically, the same Standard Product can have a different price when it is purchased stand alone, than when it is purchased as part of a configured BTO Product.

For example, assume that a store is selling both computer products (e.g. printers, monitors, other accessories, etc.) and custom-built computer systems. The same ink-jet printer could be sold for $120 when purchased on its own, but only cost $105 when purchased as an accessory for a custom configured desktop computer.

Understanding 'Build To Order' Products

The first step in using ProductCart Build To Order is to fully understand how the product catalog is organized. Unlike any other shopping cart software that you may have used in the past, ProductCart BTO contains three types of products:

- **Standard Products**
- **Build To Order Only Items**
- **Build To Order Products**

Understanding the difference between the three types and how they interact on your store is crucial to effectively using this powerful application. BTO Only Items and BTO Products are unique concepts that you have likely never encountered before.

Therefore, we recommend that you take a few minutes to read through the following paragraphs before you start using the module. Specifically, make sure you become familiar with the following definitions, which will be used throughout this chapter.

As mentioned in Chapter 4 of this User Guide, when you are importing product data from an existing database, you can specify which type of product each item should be imported as by using the *Product Type* field. For more details, please refer to the section that describes the import feature.

Definitions

- **ProductCart BTO** – A version of ProductCart that includes the Build To Order module. This version of ProductCart includes all the features that are part of the Standard version of the product, and that have been described in this User Guide in the chapters preceding this one.
- **Hidden Categories –** Unlike the standard version of ProductCart, ProductCart BTO supports both visible and *Hidden Categories*. In a store powered by ProductCart BTO categories are used not only to organize products within the store catalog so that customers may easily browse the store (e.g. printers), but also to organize products and items available for selection only within a configurable product (e.g. processors). *Hidden Categories* allow you to organize products that are not available for sale as stand alone items, and therefore should not appear in the store when customers browse the store catalog. You can set whether a category should be visible or not when adding or editing categories.
- **Standard Products –** All the products that you set up by selecting the *Add New Product* feature from the *Manage Products* menu of ProductCart's Control Panel are considered *Standard Products*. If you are importing product data using the *Import Products* feature, and you don't specify a *Product Type*, all products are imported as Standard Products. For more information about the import feature, please see Chapter 4. *Standard Products* have a number of features that are described in detail in Chapter 4 of this User Guide. Here, we will only focus on a few of them, as they relate to the BTO module.
    - Store Visibility - Standard products are visible in the store (unless inactive), and typically can be purchased (unless you have checked the *Not for Sale* option). Note that if you assign a standard product to a category that is set as not visible in the store, the product will still come up in store searches, although it will not be displayed when customers 'browse' the store catalog (as the category that it belongs to is hidden). If you need a product to hidden from display in the store, except as an item selectable by customers when configuring a Build To Order product, then add it to the store or import it as a *Build To Order Only Item*. See below for more details.
    - Not for Sale - The difference between a *Standard Product* that is 'Not for Sale' and a *Build To Order Only Item* is that the former is still visible in the catalog (e.g. a 'coming soon' product), but cannot be added to the shopping cart (i.e. can be viewed, but cannot be purchased), whereas the latter is not visible in the store catalog at all except as part of a *BTO Product*.
    - Weight – The weight of a *BTO Product* is based on the sum of the *Standard Products* and *Build To Order Only Items* that it contains. So keep in mind that the weight that you apply to standard products will affect a *Build To Order Product* that contains it.

- **Build To Order Only Items –** The name may be too long (we honestly could not come up with a better definition), but their functionality is easy to understand. Some of your configurable products may be the sum of items that your store does not want to sell as stand alone products. For example: a computer shop may not want to sell microprocessors as stand-alone products, but will likely want microprocessors to come up as one of the selectable options when users configure a custom-built PC. *BTO Only Items* serve this special purpose. Compared to standard products:
    - Store visibility – They are not visible in the store, either when users browse the catalog, or if they perform a store search.
    - Availability – They are not available for purchase as stand alone products. They can only be purchased as part of a configurable *Build To Order Product*.

- **Build To Order Products** – *BTO Products* are combinations of *Standard Products* and *BTO Only Items*, organized in meaningful groups by the store administrator, and displayed to customers as configurable products. Customers can configure them by selecting one or more items from each of the groups. The following chapters describe in detail how to setup and display *BTO Products* on your store. Here, we will focus on some general features as they compare to *Standard Products* and *BTO Only Items*.
    - Store visibility **–** *BTO Products* are always visible in the store, unless they are made inactive.
    - Availability – *BTO Products* are always available for purchase, unless the store is setup to not allow retail customers (or both retail and wholesale customers) to purchase products. Unique to *BTO Products* is the ability to make them available in a default configuration. If you would like to make a *BTO Product* available in a default configuration, then set a base price for it and select default selections when configuring it (see Chapter 4 for more details). If you would like not to make a default configuration available for sale (i.e. customers are forced to configure the product/service), then simply leave the base price to 0. The price, the quantity field and the *Add to Cart* will be hidden automatically, so that the customer will have to view the product/service configuration page.

      BTO Products are also not available for purchase when the *Disallow Purchasing* option is selected either storewide using the *BTO Settings* page, or on a product by product basis. Please see later in this chapter for more information on these settings.

Product Matrix

The following matrix should help you identify which type of product you should select when adding a new product to the store. The main factors in the decision should be:

- Visibility – Do I want users to see the product when they browse the store or look for products?
- Availability – If the product is visible, should users then be able to purchase it or should they only be able to see details about it, without the ability to add it to the cart?

- Customizable – Is this product defined by more than 2 product options? For example: are 'size' and 'color' enough for the pair of khakis you are adding to the store? Or do you need the user to also specify 'style' and 'length'?
- Part – Do you want to be able to assign this item to a configurable product, as an option that customers can choose when configuring and buying that product?

Visibility Product should be visible in the store catalog	**Availability** Product should be available for sale as stand alone	**Customizable** Product has more than 2 options.	**Part** Product is selectable as part of a BTO product	**Add the product to the store or import it as:**
YES	YES	YES	n/a[9]	**BTO Product/Service**
YES	YES	NO	YES	**Standard Product**
YES	YES	NO	NO	**Standard Product**
YES	NO	NO	NO	**Standard Product** ('Not for Sale' option)
NO	NO	n/a[10]	YES	**BTO Only Item**

Build To Order Menu Items

The Control Panel of the Build To Order version of ProductCart contains a number of new features that are not found in the standard version. Specifically, a *Manage Build To Order Products* section is added to the left side navigation. The *Manage Build To Order Products* menu contains the following items:

- **BTO Settings**. Click on this link to view an introductory page for the *Build To Order Module* and access the *General Settings* page. There are several settings that apply to all *Build To Order Products* sold on your store. They are grouped in three areas:
  - Display Settings – Here you can control the way the configuration page is displayed to your customers. The configuration page is where customers customize configurable products by selecting items from all the options that you

[9] Build-to-Order products cannot be assigned to another Build-to-Order product as a selectable option.

[10] Build-to-Order Only Items cannot have options. That's because they can only be selected as part of a Build-to-Order Product, so they are themselves an option that the user is selecting while configuring that product.

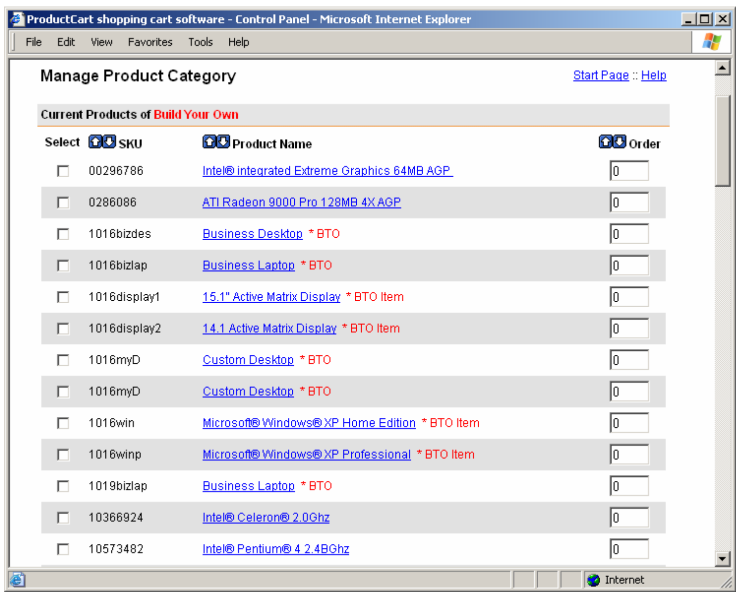
make available to them. For instance, the configuration page is where a customer would select the hard disk, processor and CD-ROM for his/her custom-built laptop computer.

  - Inventory Settings, where you can specify whether general inventory settings for your store apply to *Build To Order Products* or not. For instance, if you are selling services (e.g. catering services), you may not want to have inventory settings apply, since there is no such thing as an "out of stock" wedding reception.
  - Quoting Settings, where you can turn on or off the ability for your customers to save their configured product/service as a quote that they can later print, edit, and submit as an order.

- **Add New Build To Order Product**. Click on this link to add a new configurable product to your store. For more information on the steps of setting up and configuring a *BTO Product* refer to the section of this chapter entitled *Adding a New Build To Order Product*.
- **Manage Build To Order Products**. Click on this link to view a list of existing *BTO Products*. Several links located on the right side of the page allow you to perform the following tasks:
  - Details – Click on *Details* to view and modify product properties such as name, base price, base wholesale price, product description, images, etc.
  - Configure – Click on *Configure* to start adding selectable items to your product. This is a crucial step in setting up a *BTO Product*, so we dedicated a section to it. See *Assigning Products & Items* for more information.
  - Options – Click on *Options* to assign new options to a *BTO Product* (e.g. size, color, etc.) or view existing options. For example, you could prompt users to select the color of the computer case for the desktop computer they are ordering, regardless of how they customize it. Using product options instead of a configuration group for the 'case' let's users add the product to the shopping cart without having to go through the configuration page (e.g. they like the default configuration), while still prompting them to select that option.
  - Custom Fields – Just like with *Standard Products*, click on this link to add custom search and input fields to your product or view existing custom fields. Refer to the ProductCart User Guide for more information.
  - Clone – Click on *Clone* to create a duplicate of the product. Note that you will not be cloning the product configuration, but rather only the base product settings. You can then clone the product configuration using a separate feature, which is discussed later in this chapter.
  - Delete - Click on the *Delete* button to delete the product from the store and the Control Panel. The product is not actually deleted from the database, to preserve the integrity of other sections of the system. Note: if you want to prevent the product from being displayed on your on-line store, but you want to keep it visible in the Control Panel, make the product inactive (do not delete it). This allows you to temporarily prevent people from buying an item, but gives you the ability to make the item available for sale again at any time. Instead, deleted products are permanently removed from the Control Panel.

- **Locate a BTO Product** and **Locate a BTO Item** – This feature works identically to the Locate a Product feature discussed in Chapter 4. However, the pool of products that you will searching, will only be made of BTO Products in the first case, and BTO Items in the second case. In other words, the search feature automatically filters out all products that do not belong to the product type on which you are performing the search. For more information on how to use the various search fields, please refer to the section that describes the Locate a Product feature as it applies to Standard Products.

- **Manage Categories** – Since your store could have hundreds of *Standard Products, BTO Products,* and *BTO Only Items*, the *Manage Category* features works slightly differently with the Build To Order version of ProductCart. Whenever you view products within a category, or add products to an existing category, ProductCart will show you the product type (e.g. "BTO" or "BTO Item") next to the product name (see example below).



- **Add New Build To Order Only Item** – Click on this link to add a new *BTO Only Item* to the store. For more information about products and items, please refer to Chapter 3.

- **Manage Build To Order Only Items** – Click on this link to view a list of *BTO Only Items* that have been added to the store. From there, you can either edit their properties or delete them.

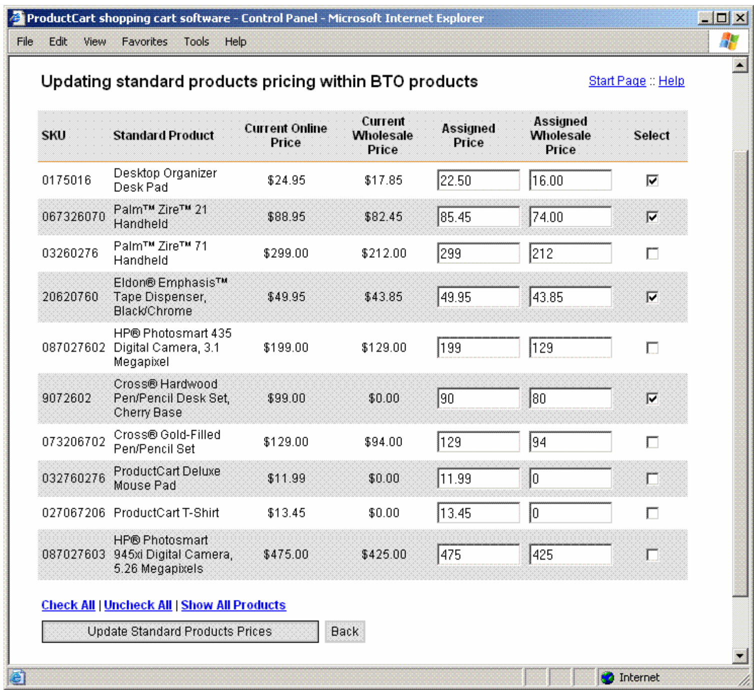
- **Updating Prices within BTO Products** – As mentioned earlier in this User Guide, ProductCart assumes that when a Standard product is added to a BTO product as a selectable option, its price may be different than the price of the product when purchased as a stand alone item. As you remember, we used the example of a computer printer: the store could sell it for $150 when purchased by itself, but only charge the customer $120 when the printer is purchased as one of the available accessories to a custom-built computer system.

  If the store administrator increases the price of that printer to $160, the price for the same printer when purchased within a BTO product is NOT be updated to the same amount.

In other words, price changes applied to Standard Products or Build to Order Items do NOT affect instances of those products within BTO products.

ProductCart includes a feature to help you quickly update prices within Build To Order product configurations. From the *Manage Build To Order Products* menu, select *Updating Prices within BTO Products*. You have two options:

Standard Products: Select *Update Standard Products Prices* to update the online price and wholesale price of all instances of selected Standard Products that have been assigned to one or more BTO products. All affected BTO products will be updated. You will be able to select which Standard Products should be included in the update and change the corresponding prices.

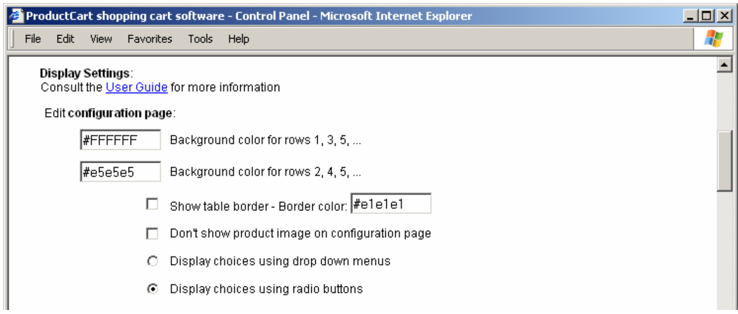


SKU	Standard Product	Current Online Price	Current Wholesale Price	Assigned Price	Assigned Wholesale Price	Select
0175016	Desktop Organizer Desk Pad	$24.95	$17.85	22.50	16.00	☑
067326070	Palm™ Zire™ 21 Handheld	$88.95	$82.45	85.45	74.00	☑
03260276	Palm™ Zire™ 71 Handheld	$299.00	$212.00	299	212	☐
20620760	Eldon® Emphasis™ Tape Dispenser, Black/Chrome	$49.95	$43.85	49.95	43.85	☑
087027602	HP® Photosmart 435 Digital Camera, 3.1 Megapixel	$199.00	$129.00	199	129	☐
9072602	Cross® Hardwood Pen/Pencil Desk Set, Cherry Base	$99.00	$0.00	90	80	☑
073206702	Cross® Gold-Filled Pen/Pencil Set	$129.00	$94.00	129	94	☐
032760276	ProductCart Deluxe Mouse Pad	$11.99	$0.00	11.99	0	☐
027067206	ProductCart T-Shirt	$13.45	$0.00	13.45	0	☐
087027603	HP® Photosmart 945xi Digital Camera, 5.26 Megapixels	$475.00	$425.00	475	425	☐

Build To Order Items: Select *Update BTO Items Prices* to update the price and wholesale price of all instances of selected BTO Items that have been assigned to one or more BTO products. All affected BTO products will be updated. You will be able to select which BTO Prices should be included in the update and change the corresponding prices. Display & Quoting Settings.

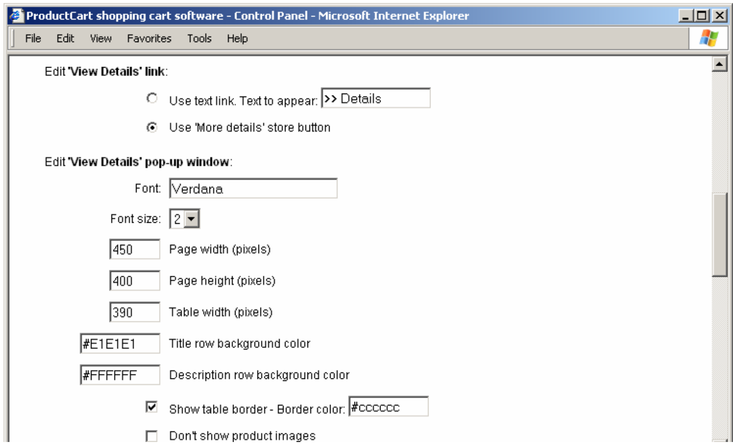
Build To Order Settings

From the *Manage Build To Order Products* menu, select *BTO Settings*. The *General Settings* page is divided into four areas.



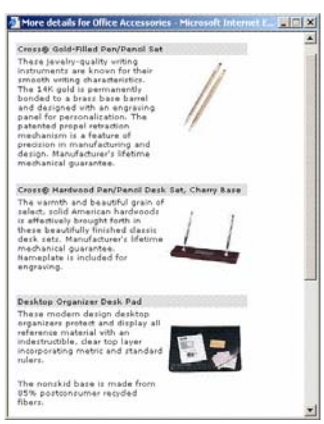
- **Display Settings**. These settings change the way the configuration page and the "View Details" pop-up window are displayed.
  - Edit configuration page. You can change the following settings:
    - The background color for the rows that contain configuration options. ProductCart alternates row background colors to visually help the customer separate configuration options.
    - Whether or not to show a border for the table that contains those rows
    - Whether or not to display a product image for the *BTO Product* that the customer is configuring.
    - Whether to display options using drop-down menus or radio buttons. The following image shows the same configuration page setup with drop-down menus (on the left) and radio buttons (on the right).

  - Edit "View Details" Link. You can specify whether to use a text link or an image link. When you opt to use an image, ProductCart uses the *More Details* button that is being used for the store. The two examples above both use an image to link to the "View Details" page.



The "View Details" link opens a pop-up window containing product information for the items available in that particular option menu. The link is only shown when selected by the administrator during the setup of a *BTO Product*. See *Assigning Products and Items* for more information.

- Edit "View Details" pop-up window. You can control the size and look of the "View Details" pop-up window using the following settings:
  - Font type and size
  - Page width and height
  - Table width. Product information is organized as shown in the image below: A title row (product name), and a description row, which may or may not contain a product image.
  - Background color for the two rows.
  - Whether or not to show a border for the table that contains those rows
  - Whether or not to display a product image for the items displayed.

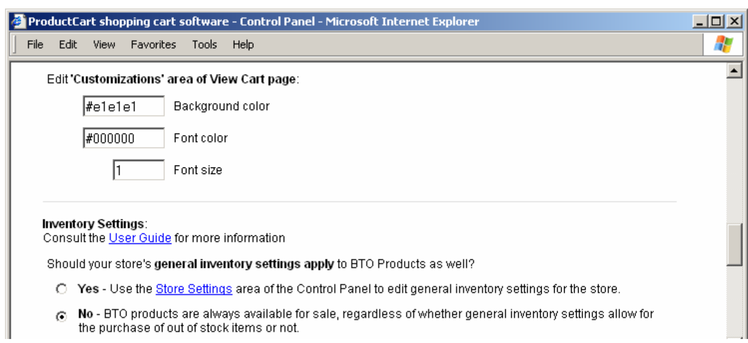


This "View Details" window was setup with a gray background for the title row, a white background for the description row, no table border and product images.

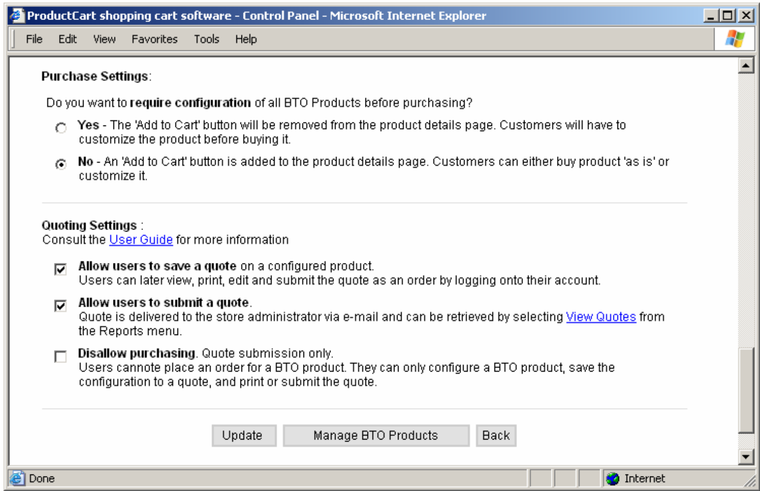
A "Close" button is automatically placed by ProductCart at the bottom of the page.

- Edit Customizations Area of View Cart page. These settings control the look and feel of the area of the view shopping cart page that displays the options selected when configuring the BTO product (see example below).

Typically, you will want to use a font size smaller than the rest of the store, so that it is clear to the customer that those are options within the configured BTO product, and not separate products. Choosing a different background color helps visually separate that area as well.



- **Inventory Settings.** You can decide whether to have inventory settings apply to *BTO Products* or not.
    - If you select *Yes*, then the general inventory settings for your store, which you have configured under *General Settings/Store Settings*, will also apply to *BTO Products*.
    - This may not work well in a scenario in which you are selling both products and services on your store, you keep inventory on your products and do not want customers to be able to purchase out of stock items BUT need customers to be able to select, configure and purchase one of your services, for which there is no inventory.
    - In this and other scenarios in which applying inventory settings to *BTO Products* may cause a conflict, select *No* (which makes *BTO Products* always available for sale, regardless of whether general inventory settings allow for the purchase of out of stock items or not).
    - When an order is placed, inventory levels are adjusted both for the BTO product and for the standard products and BTO items included the configuration. This is a new feature in v2.62 and above. In versions prior to v2.62, inventory levels for the selected configuration items were not updated.



- **Purchase Settings.** As you will see in more details in the next section of this User Guide, when you create a BTO product you can set up a default configuration for the product (e.g. a custom computer may come standard with a certain processor, memory, hard-disk type, etc.). Here you can define whether or not you want to prevent customers from purchasing the product or service "as is" (i.e. in its default configuration), and therefore forcing them to go through the configuration page.
  - If you select **Yes**, the quantity field and the *Add To Cart* button will be removed from the product details page. Customers will have to customize the product before buying it.
  - If you select **No**, a quantity field and an *Add To Cart* button are added to the product details page. Customers can either buy the product 'as is' or customize it.

- **Quantity Discount Settings**. Here you can specify how quantity discounts should be calculated when applied to BTO products. You have two options:
  - You can have ProductCart calculate quantity discounts on the configured price. When this option is selected, ProductCart uses the following formula to apply product quantity discounts to BTO products.

Unit Price = (Default Price + Selected Items' Prices – Item Discounts)*(1-Quantity Discount Rate)

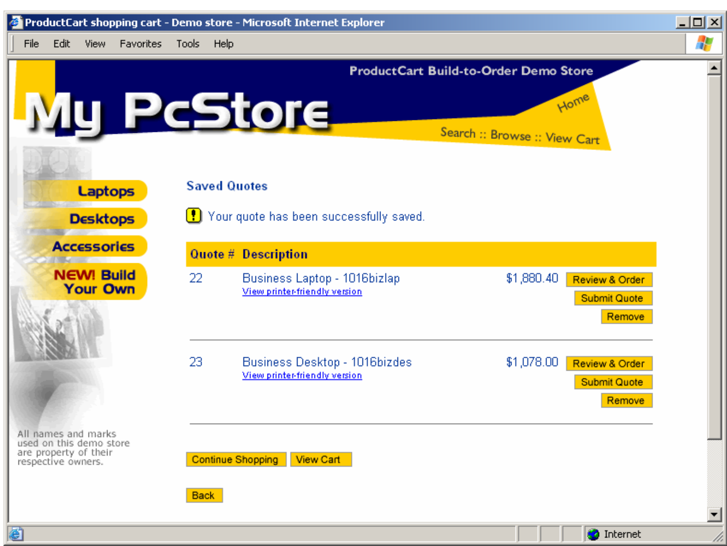
  - Or you can have ProductCart calculate quantity discounts on the default price. In this scenario, quantity discounts are applied to the Build To Order product before the any customizations are selected by the customer. Note that ProductCart will use the *Default Price* (base price + default items' prices), not the *Base Price* to perform the calculation. The formula in this case is:

Unit Price = (Default Price)*(1-Quantity Discount Rate) + Selected Items' Prices – Item Discounts

Note that all of the above applies only when the discount is a percentage discount. When quantity discounts use an absolute amount (e.g. $15 per unit), the result is the same regardless of the option selected in this area. In that case, the formula is simply:

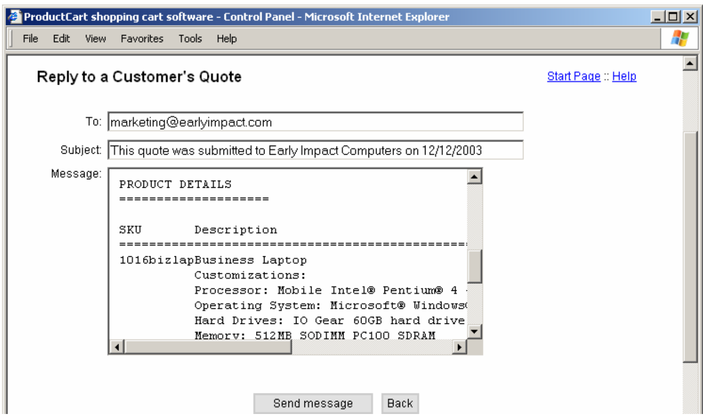
Unit Price = Default Price + Selected Items' Prices – Item Discounts – Product Discount

- **Quoting Settings.** This set of options allows you to enable and disable unique and powerful features of the *Build To Order* module. That is: the ability for your customers to save a current configuration (i.e. a "quote") so that it can be later printed in a printer-friendly format, edit it, submit it to the store, or turn it into an order. Before being able to save a quote, customers that are not registered with your store, or that are not logged in, will be prompted to log in. After they log in, the information will be saved to their account. At any time, they can access their account, view & print previous quotes, reconfigure the product or service, and submit it as an order depending on the settings described below.
    - Allow users to save a quote on a configured product. When this feature is turned on, a *Save Quote* button is displayed on the product configuration page. Users can later view, print, edit and submit the quote as an order (if the *Allow users to submit a quote* option is checked). When saving a quote, customers are prompted to enter a discount code, if any. If a valid discount is entered, the amount is adjusted accordingly, and if the quote is later turned into an order, the discount information is carried through the checkout process.
    - Allow users to submit a quote. Quote is delivered to the store administrator via e-mail and can also be retrieved via the "Manage Quotes" menu.
    - Disallow purchasing. Quote submission only. When this option is selected, users cannot place an order for BTO products. They can only configure a BTO product, save the configuration to a quote, and print or submit the quote. This option is often used together with the *Hide Prices* feature described below. Note that this feature applies storewide to all BTO products. If you would like to apply it to a specific BTO products, use the *Add/Modify BTO Product* page, discussed later in this chapter.



In the example shown above, the customer saved two quotes to his account. At that point quotes can be submitted to the store. The quote submission feature allows you to:

- Process an order offline for those customers that are not comfortable buying online, while still using ProductCart to have them specify exactly what they need, rather than taking the quote over the phone or via fax.
- Provide customers with an updated price for a product or service for which you are using the *Hide Prices* feature. As described in the next section, this feature allows you not to show any prices for a particular product or service. For example, it applies to scenarios where prices fluctuate rapidly.



When a quote is submitted by a customer, an e-mail is automatically sent to the store administrator. At that time, the store administrator can log into the Control Panel, view the quote details, and reply to it from within ProductCart, as shown below. This allows you to save time by having all the quote details already in the e-mail message that you will reply to your customer with (e.g. to confirm that the quote is accurate and that he/she may send a purchase order based on it).

Steps to Creating a Build To Order Product

You should think of a *Build To Order Product* as a *virtual basket* to which your customers will add products and services. These products and services are the items that you assign to the *Build To Order Product* when you configure it in the Control Panel, and which become selectable options in the storefront.

Just like any other product, a *BTO Product* needs to be assigned to a category (e.g. "Computers > Desktop Computers > …). So before you create your *BTO Product* you need to create the product category to which it will be assigned. Refer to the section Creating and Modifying Product Categories for more information.

Unlike *Standard Products,* a *BTO Product* will contain a number of items which the customer will select during the ordering process. These items, once assigned to the *BTO Product*, become options that the customer can select to customize the product. These items can either be *Standard Products* and/or *Build To Order Only Items*. So before you assign items to your new *BTO Product,* you will need to add them to your store database.

- For instructions on how to add *Standard Products* to your store, refer to Chapter 4.

- For instructions on how to add *Build To Order Items* to your store, see the section entitled *Adding a New Build To Order Only Item*, which is located later in this chapter.

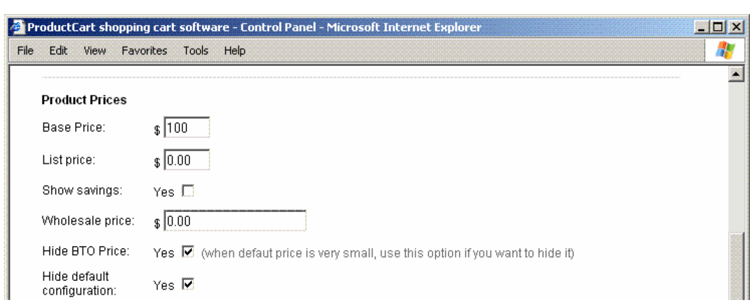
Adding a New Build To Order Product

To add a new *BTO Product* to your store, select *Add New BTO Product* from the *Manage Build To Order Products* menu. The page that will be displayed is very similar to the *Add New Product* page that is described in Chapter 4 of the ProductCart User Guide. Please refer to that document for a detailed explanation of all the fields that appear on this page. Here, we will focus only on a few of them, whose functionality changes when applied to *BTO Products.*

Overall, when you review the following paragraphs, keep in mind that when you add a *BTO Product* to your store, what you are doing is really setting up the "default" or "base" configuration for this customizable product or service. The field values that you assign to the product using the *Add New BTO Product* form (e.g. the base price) appear (1) in store searches, (2) when customers browse the store by category, and (3) on the product details page before any customization has taken place.

- **SKU**, **Name**, **Description** – This is the SKU (or part number), Name and Description of the base configuration for this product. On a computer store, for example, there may be a "Build Your PC" category containing three customizable computers, whose default configurations and available options differ slightly. They might be called "Gaming PC", "Home Office PC", and "Road Warrior". The names, part numbers and descriptions for these products are entered here.

- **Base Price & Default Price** – The base price is the minimum price for the product before any customizations have been made, either by the administrator (default selections – see *Assigning Products & Items* for more details) and/or by the customer. In some cases the base price could be zero. This could likely be the case when the store is selling a service that is entirely customized to meet the client's needs (e.g. printing services, catering services, etc.). In most cases, however, the base price will reflect the cost of the product without any configurations. For example, a computer store may set the base price at a level that covers items that cannot be chosen by the customer (e.g. the motherboard, the computer case, etc.).



  - When the base price is zero, ProductCart automatically hides it whenever the product is shown on the store, and does not allow the customer to add the product to the shopping cart from the product details page, but rather only from the product configuration page. This allows the store administrator to 'force' the customer to configure the product or service, which can only be added to the shopping cart (or saved as a quote) after it has been configured. This would typically be the case when the store is selling products or services for which there is no "default" configuration.

  - When the base price is other than zero, but there is no default configuration, then ProductCart displays it on the product details page, together with the list price and the online savings offered by the store, if that option is selected.
  - When the administrator has set default configurations for the product, then ProductCart displays the **default price**, i.e. the sum of the base price plus the prices of the default selections chosen by the administrator. For more details about how the administrator can setup default selections for a product, see the section of this chapter entitled *Assigning Products & Items*.
  - If the price base price and/or default price (base price + default options) is other than zero, but you don't want to show it in the storefront (e.g. it's too small or could confuse customers), check the *Hide BTO Price* option.
  - If the administrator has assigned default selections to the BTO product, these items are listed on the product details page, right above the price. In some cases, you may not want to show this list (e.g. the list is too long). Check the *Hide Default Configuration* to hide the list of default selections from the product details page.

    Whenever there are default selections, the default price becomes the minimum price for the product, until the customer chooses selections cheaper than the default ones, if any, while configuring the product. If there are no default selections, then by definition the default price equals the base price. If there are no default selections and the base price is zero, the price is automatically hidden and the customer is forced to go through the configuration steps.

    For example, continuing with the computer store scenario, the price of a *BTO Product* may be setup as follows:

      - Base Price: $100. The base price, as we mentioned, is entered at the time the *BTO product* is added to the store. In this scenario, it may include the cost of the computer case, fan, motherboard, etc.
      - Default Customizations: $350. The administrator may suggest a configuration by choosing a default processor, hard disk, etc. The customer will then be able to either add the product to the shopping cart 'as is', if he likes the default selections, or change one or more of them.
      - Default Price: $450 = $100 + $350. The default price changes dynamically based on the administrator's default selection and the base price. This is the price that is shown on the store for this *BTO Product.*

- **Weight** – Similarly to the price, the weight can be affected by the store administrator's default selections. There are three weights for a *BTO Product*:
  - Base Weight – This is the weight that is entered when adding a *BTO Product* to the store catalog. Continuing on the example mentioned above, this would be the

weight for the computer case, the motherboard, and other items that make up the base product.

- o <u>Default Weight</u> – This is the sum of the base weight plus the weight of all the items chosen by the store administrator as part of the default configuration. If the customer were to buy this *BTO Product* 'as is', because he/she likes the default configuration, then this would be the weight used by ProductCart to calculate shipping charges (if you are using a weight-based shipping rate).
- o <u>Configured Weight</u> – This is the sum of the base weight plus the weight of all the items chosen by the store administrator and/or the customer. When the customer customizes the product using the configuration page, the weight changes dynamically based on his/her selections.

- **Disallow Purchasing and Hide Prices**– There are scenarios in which you may want customers not to be able to purchase a certain product or service, but rather only create a custom quote for it. In some cases, you may also want to hide prices for that product or services.

Continuing on our computer shop example, let's assume that you were selling refurbished systems: the prices of many of the parts may fluctuate daily depending on availability and other factors. So rather than showing prices that may be too high or too low, you may want your customers to configure the custom computer that they would like to purchase, without seeing any prices. When they submit the quote via e-mail, you can look up updated prices for each of the parts that they included in their configured product, and get back to them with a price.

When the *Disallow Purchasing* option is selected, the following occurs on the storefront:

- o The product details page does not contain a *Buy Now* button. Customers can only proceed to the configuration page. The default price for the product is hidden throughout the store is the *Hide Prices* option is selected.

- The second step of the configuration process (or the first step of the configuration process if there are no *Additional Charges* assigned to the product) does not contain a *Buy Now* button. All prices are hidden if the *Hide Prices* option is selected, otherwise they are shown.
- Customers can only save the configured product or service as a quote. If you want customers to be able to submit a saved quote to you, make sure to enable the *Allow Users to Submit a Quote* feature on the *BTO Settings* page.

- **Downloadable Product Settings**. Just like with standard products, you can set a BTO product to be a downloadable product. For details on these settings, please refer to the section of this User Guide that covers downloadable products.

  Note that the BTO product itself can be a downloadable product. However, if you assign downloadable products to the BTO product as selectable items, those products are not processed as downloadable products. This feature could be used, for example, if you were to sell a software package and have the customer configure whether or not they wanted a printed or electronic manual, standard or premium technical support, assisted installation, other related services, etc. These items that are assigned to the BTO product are not downloadable products. The downloadable product is the BTO product.

- **Duplicating BTO Products** - To create a new *BTO Product* that is similar to as an existing Build To Order product or service, take advantage of the *Create New BTO Product Like:* feature. Simply choose an existing product from the drop-down menu and click on the *Go* button.

Click on the *Add* button to add the new *BTO Product* to your catalog. A confirmation page will be displayed. From this page, you can perform a number of tasks, which are listed below.

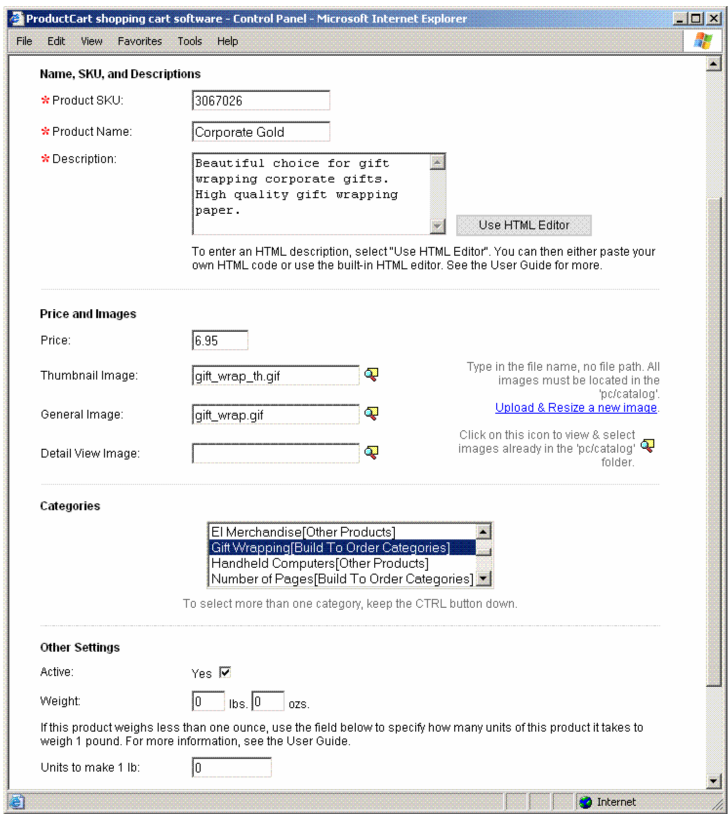
- Configure this Build To Order product or service – Click on this link to start configuring this *BTO Product*. You will be able to add groups of products and items for your customers to select from when they customize and buy this product. The next section of this chapter describes in detail how to configure a *BTO Product*. You can also copy the configuration from an existing product, a great time-saving feature when setting up similar BTO products.
- Add/Modify custom search or input fields – This link will take you to a page where you can add new custom search or input fields, or view existing custom fields for this product. Please refer to Chapter 4 of the ProductCart User Guide for more details on custom input and search fields.
- Set quantity discounts – Click on this link to be taken to the section of the Control Panel where you can add/edit quantity discounts for your products. Please refer to Chapter 5 of the ProductCart User Guide for more details on quantity discounts.
- Modify this product again – This link will take you back to the previous page so that you may edit the product again.
- Assign to other categories – Click on this link to be taken to the *Manage Categories* area, where you can assign or remove this and other products from a category.
- Add another product – Loads an empty *Add New BTO Product* form.

- View all products – Use this link to view a list of all *BTO Products* in your store. From there you can modify a product, configure it, assign options to it, assign custom input and search fields to it, or delete it from the store database.

Adding a New Build To Order Only Item

For the definition of a *Build To Order Item*, please refer to the section *Understanding Build To Order Products.* To add a new BTO Only Item to your store, select *Add New BTO Item* from the *Manage Build To Order Products* menu.

You will notice that the page that is displayed has fewer fields than the *Add New Product* form. The reason is that, unlike *Standard Products*, *BTO Only Items* are not available for sale as stand-alone products, and therefore many of the settings don't apply.



When you edit a BTO Item, you will notice the presence of an additional option next to the product's price field. This option has to do with whether or not you want all instances of that BTO Item to be updated when the price changes. Enable the option if you want all BTO products to which you have assigned the selected item to be updated with the new price when the item's price is updated on this page.

If you need to update some, but not all BTO products with new pricing for one or more selected BTO Items, use the feature *Updating Prices within BTO Products*, discussed earlier in this chapter.

Assigning Products & Items

When customers select a product or service to customize…

- …what options will be available for them to choose from?
- …which options will be required, and which will not?
- …which options are exclusive (choose one or the other) and which are not (choose any of the following)?
- …which options can be added to the configuration in more than 1 unit, if any?
- …how will the price change as different options are selected?
- …should there be any 'default' options that you suggest your customers select?

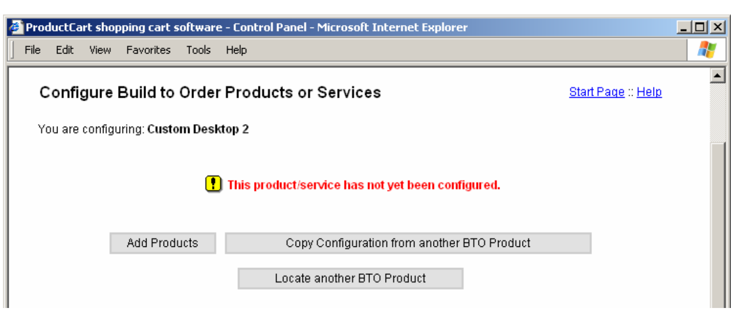
The core of the *Build To Order* module is the **product configurator**, which in version 2.6 and above consists of two storefront pages.

- The first page includes items that are added to the order as a function of the number of units of the BTO product purchased by the customer. For example, if the unit price for the option "4-Color Printing" adds $0.75 to the unit cost of a brochure, an order for 100 brochures will include a total cost of $0.75 * 100 = $75 for that option.
- The second page includes items that affect the order identically regardless of the purchased quantity. For example, a "Rush Charge" would remain $250 regardless of whether a customer is ordering 100 or 200 brochures.

In the Control Panel, the store administrator allocates existing *Standard Products* and *BTO Only Items* to a *BTO Product* so that customers will be able to view them and select them. Depending on how they are set up, they will appear on either the first or second page of the product configurator. . For customers to be able to customize a product, two elements have to be in place:

1. A "base" product, which is what the store administrator creates using the *Add New BTO Product* feature
2. Several options that the customer may choose from, which are 'assigned' to the base product as explained in the paragraphs that follow.

Since we have already covered how to add a new *BTO Product* to the store catalog, let's now focus on how to assign other products and items to an existing *BTO Product*. To get started, select *Manage BTO Products*. A list of existing Build To Order products and services will be shown to you. Pick any of them and click on *Configure*.

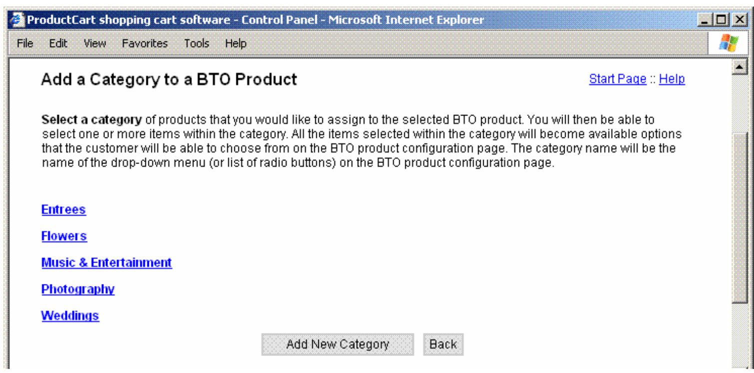


Because you have not yet specified which options make up this configurable product or service, you will receive the message "This product/service contains no configurable items". Click on the *Add Products* link to start adding items to this *Build To Order* product or service.

A great time-saver is the ability to copy the product configuration from an existing *BTO Product*. This allows you to quickly create similar *BTO Products*. If you opt to use this feature, you will be able to select any *BTO Product* that has already been configured and copy its entire product configuration. You can then edit it as you wish.

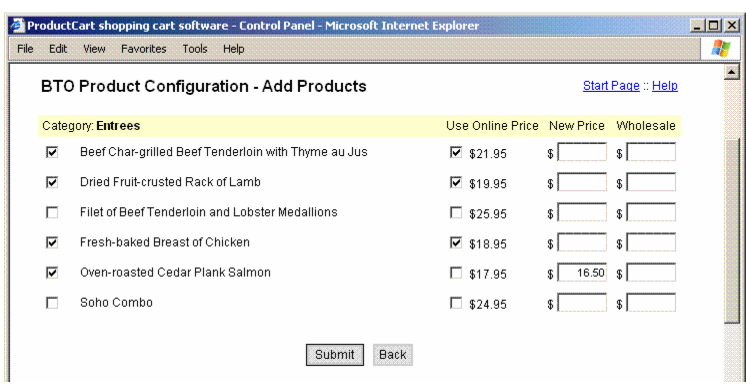
Creating a New Build To Order Configuration

Let's now focus on the steps that are necessary to create a new configuration.



The first step to configuring a *BTO Product* is to select a category of items that you would like to add to the configuration. You will then be able to select one or more items within the category. All the items selected within the category will become available options that the customer will be able to choose from on the BTO product configuration page. The category name will be the name of the drop-down menu (or list of radio buttons) on the BTO product configuration pages.

You can add unlimited categories to a product configuration, and you can have an unlimited number of selectable items within a category. Even after you have added a category to the product configuration, you will be able to edit your selection by adding new items, removing items from the category, or removing the entire category from the product configuration.



Select the check box to the left of the item(s) that you would like to make available as a configurable option for your *Build To Order Product*. Only eligible products within the selected category will be shown. For example, *BTO Products* cannot be assigned to another *BTO Product* as a selectable option, and therefore are not shown. Products are shown in alphabetical order, sorted by name. This sorting method is used to assign a default order to the selectable options within the product configuration: i.e. by default all products are ordered by name. As mentioned below, you will able to manually edit the sorting criteria when fine-turning the product configuration.

Note that next to each of the items are three price fields:

- **Reg Price**: this is the regular price for the product. If the product is a *Standard Product,* this is the online price for that product, i.e. the price at which the product is sold as a stand-alone item in your storefront. You can opt to use the *Reg Price*, or you can enter a new prices.

  Why would you not use the *Reg Price*? For example, continuing with the PC store example mentioned above, let's assume that you wanted to sell a CD-ROM as a stand-alone product on your online computer store, with a retail price of $129.95. You might want to give your customers a discount if they opted to purchase a whole computer system that included the same CD-ROM. To do so, you would enter a lower price (e.g. $99) in the *Price* field on this page. The same is true for wholesale prices applied to wholesale customers.

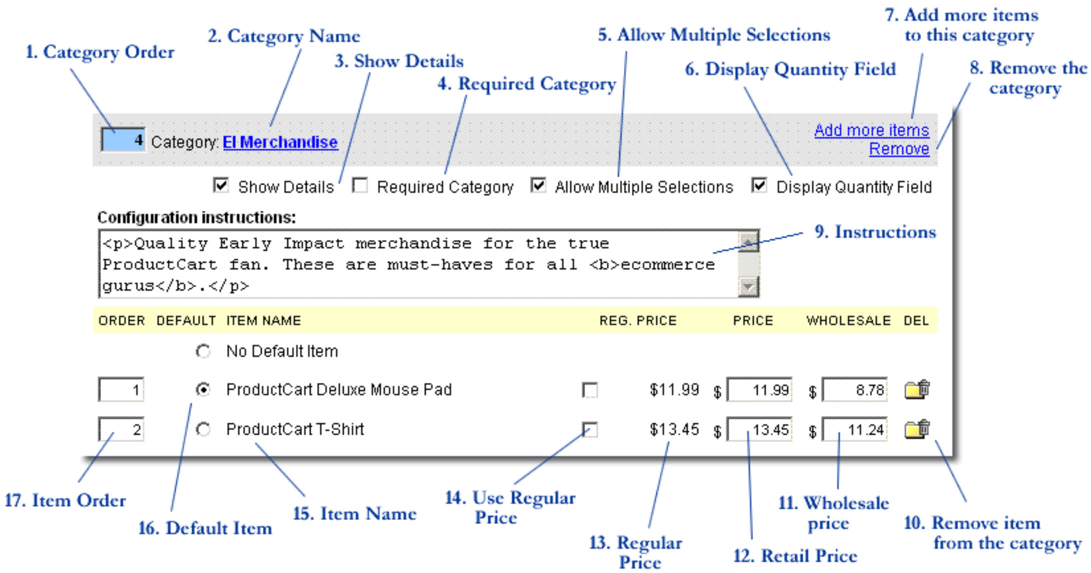
- **Price**: enter the price that you would like to use in case you opt not to use the *Reg Price* for the product or in case that price is zero.

- **Wholesale price**: enter the wholesale price in case you opt not to use the default wholesale price for the product.

Once you have chosen all of the items that are going to be available to your customers as options when configuring this *BTO Product*, click on *Submit*. You can always come back to this window at any time to add more categories, products & items to your configurable product. Of course, you can also remove items that you had previously selected.

All of the products and items that you have selected will appear to your customers when they choose to configure this *BTO Product*. How will they be displayed? How can you control the user experience? The overall page display settings (e.g. whether options should be shown using drop-down menus vs. radio buttons) are defined using the Build To Order Settings page, described earlier in this chapter.

The *Configure Build To Order Products or Services* window gives you all the tools you need to closely define your store visitors' experience when customizing the product. Here is a brief description of the page content. Please use the following graphic as a legend.



1. **Category Order** – Enter numeric values to control the order in which categories will appear on the configuration page. You can then sort items within a category using the *Item Order* input field, described below under (17). By default, categories are sorted in the order in which they are added to the configuration, and items are sorted alphabetically by product name.

2. **Category Name** – This is the name of the configurable product. When people browse your store, this is the name that will be displayed, together with the base price that you entered when you added the product to the store. If the price is 0, then it is automatically hidden. To change the product name, the default price or other basic product information, select *Modify BTO Products* from the *Manage BTO Product* menu, then locate the product and click on *Modify*.

3. **Show Details –** When you added *Standard Products* and *BTO Only Items* to your store database, you probably entered descriptions, product images, etc. Check this box if you would like your customers to be able to click on a *View Details* text or image link, which will show such information nicely organized in a pop-up window. As mentioned earlier in this chapter, you can control the look of the "View Details" pop-up window under *BTO Settings/General Settings*.

   Offering additional information on the available options may help your customers make better selections and reduce customer service inquiries. For example, while configuring a custom PC, customers may want to find out more about the different features of the CD-ROM drives available for selection, without having to leave the page. The "View Details" window would contain descriptions and images for those CD-ROMs.

4. **Required Category –** If you check this box the customer will be required to choose at least one item from that category. For example, a computer doesn't work without at least one hard drive, so you would want to make hard drives a required category. Make sure that you select a *Default Item* when you set a category as required: you cannot set a category to be required without setting a default item.

If the option is left unchecked, then the category is not required and the option *None* is automatically added to the drop-down menu (or radio buttons) if the category is also set to not allow multiple selections. For example, your customers may not be required to select a monitor, in which case they will select *None* from the *Monitors* drop-down menu..

5. **Allow Multiple Selections –** This feature changes the way products are shown on the page, and how many of them can be selected. Specifically, when you check the *Allow Multiple Selections* box, all products in the category will be displayed as a list with check boxes, allowing the customer to choose one or more of the items. For example, you may allow the customer to select more than one software package or peripheral for their custom built PC.

   If you leave this option unchecked, items are displayed either in a drop-down menu or as a list of radio buttons, depending on the option you selected under *General Settings,* and the customer can only choose one item.

   Even when you check the *Allow Multiple Selections* option, you can define a default item for the category and you can set whether the category is required or not. If the category is not required, customers will be able to uncheck the default item (if any). If the category is required, if they uncheck the default item, they will be asked to check at least another item from the available selections. Note that the features described in this last paragraph were added with the v2.7 release of ProductCart, and were not available in earlier versions.

6. **Display Quantity Field** – Check this option if you want customers to be able to order multiple units of a selectable item within the category (or of any of the selectable items within the category, if the category is set to allow multiple selections). You can hide or show the quantity field for any category shown on the first page of the product configurator. You cannot show the quantity field for *Additional Charges* show on the second page of the product configurator, since by definition these charges are not a function of the quantity ordered.

   If this option is not checked, then ProductCart will automatically add 1 unit of a selected item to the product configuration, and the customer will not be able to increase that number.

   If a customer orders 3 units of a certain item, and 2 units of the BTO Product to which the item has been assigned, this means that the customer is actually buying 6 units of that item. This is important to keep in mind in order to understand how quantity discounts are calculated on the product configuration page. Please refer to the next section for more information.

7. **Add more items** – Click on this link to view a list of Standard Product and Build To Order Items that belong to the selected category, and that have not already been assigned to the BTO Product. If you wish to add a new category, click on the *Add Another Category* link located either at the bottom or at the top of the page.

8. **Remove** – This feature allows you to completely remove a category from the BTO configuration. The same occurs when you remove all items within the category.

9. **Instructions** – You can show category-specific instructions on the configuration page. Use this feature to "coach" your customers while they are configuring the product. This is especially useful for new customers, who may be a bit intimidated when faced with a long product configuration page. You can use basic HTML tags to add special content to the

field, including link to images and other files (e.g. a link to a PDF file, or another page on your Web site, etc.).

10. **Remove Item from Category** – Click on the icon to remove the selected item from this category. If you delete all items within a category, the category will be removed from the configuration. When you delete an item, you are actually only removing it from the list, and you can always add it back. You are not deleting the product or item from the store database.
11. **Wholesale Price –** Enter the wholesale price if you elect not to use the default wholesale price that you had defined for this product when adding it to the store database.
12. **Retail Price –** Enter the price that you would like to use if you elect not to use the *Reg Price* value. For example, this is often the case when merchants decide to charge a price that is lower than the list price for the product, since the customer is purchasing it as part of larger order.
13. **Regular Price** – As mentioned earlier in this document, this is the price that the product is sold for as a stand-alone product. You can opt to use this price, or enter new prices as mentioned below.
14. **User Regular Price** – Check this box if you want to use the *Regular Price* as the *Retail Price* for this item. Otherwise, enter a different price in the *Price* field.
15. **Item Name** – This is the name of the *Standard Product* or *Item* available as part of this configurable *Build To Order Product*.
16. **Default Item** – Select the *Default* option to make this the default selection for your configurable product. This allows you to create a "suggested" configuration for your Build To Order product or service. For instance, you could be offering five types of paper as part of a configurable printing service, and may want to suggest to your customers that they print their document using medium-quality paper.

    Customers will be able to either accept your default selection, which will be displayed when they start configuring the product (unless the *Hide Default Configuration* option has been selected when adding or modifying the BTO Product), or select another one (e.g. a cheaper or more expensive type of paper). The price difference will be shown next to the item, together with the words "Add" or "Subtract" and the monetary value.

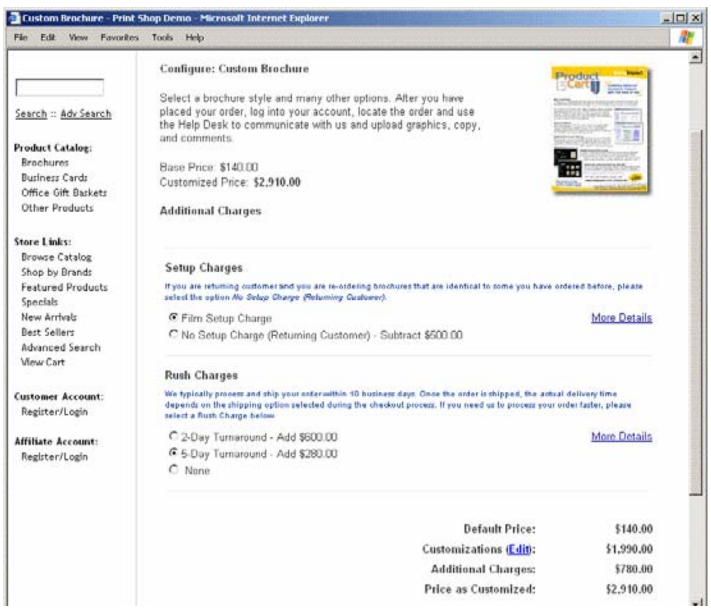
    When you make default selections, the prices associated with those items are added to the product's base price. The result, called the *Default Price*, is shown on the store instead of the base price for the product. The *Default Price* then changes dynamically based on the customer's selection.

    If there are no default items, select the *No Default Item* check box. No selection will be added to the default configuration. If there are no default selections, then the *Default Price* equals the *Base Price* for the product.
17. **Item Order** – Enter numeric values to control the order in which items appear within the category. For example, you may want to sort *Hard Disks* by their capacity, or sort monitors by their screen size, etc. By default, items are sorted alphabetically by product name.

Configuring Additional Charges

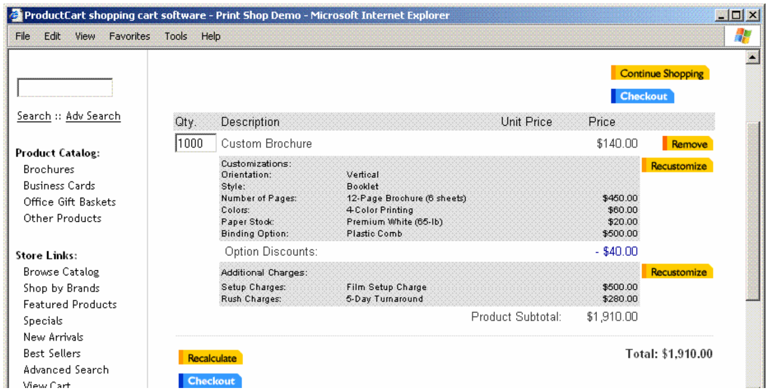
The product configurator provides an additional layer of flexibility in that it allows you to add charges that are not dependent on the quantity ordered by the customer.

- These *additional charges* are displayed on the second page of the product configurator.
- Regardless of the quantity entered in the quantity field on the first page of the product configurator, these charges remain the same (e.g. a $250 Film Setup charge is charged regardless of whether you order 1,000 or 2,000 custom mouse pads for your company).
- Similarly to any other category of selectable options, they can be configured to allow or not allow multiple selections within a category. When the category only allows one selection, you can make it required and select a default option. Unlike the options on the first page of the product configurator, additional charges cannot be added in more than one unit to the order (i.e. a quantity field cannot be shown).



- Four prices are shown at the bottom of the page:
  - Default price – This is the starting price for the configurable product or service, times the number of units purchased. This price is zero when the base price is zero and there are no default selections.
  - Customizations – The price associated with all the selected options, times the number of units purchased, minus any quantity discounts. Note that this price does not contain any quantity discounts on the first page of the product configurator (quantity discounts are displayed separately as *Items Discounts*).
  - Additional charges – The price associated with the additional charges selected on the page. If any of the charges was added to the product configuration by the store administrator (default charges), this price reflects those amounts.
  - Price as Customized – The total price.

On the shopping cart page, and whenever order information is displayed in the storefront as well as in the Control Panel, *Additional Charges* are shown below the customizations.



How quantity discounts apply to a BTO product

Earlier in this User Guide you have learned about quantity discounts. Here we will focus on how quantity discounts come into play when customers configure a BTO Product. Quantity discounts can be assigned to the Build To Order product itself, or to any of the items that can be selected on the product configuration page.

Both discounts are calculated in real-time on the configuration page, and they are shown as separate line items on the page (*Item Discounts* and *Quantity Discounts* respectively).

When the BTO product has quantity discounts assigned to it, they are applied according to the settings chosen on the *BTO Settings* page, as described earlier in this chapter. In this section we will instead focus on item discounts: i.e. quantity discounts applied to products that can be selected on the BTO configuration page.

- When a selectable item has been assigned quantity discounts, a discount icon is show on the configuration page, next to the *More Details* link. If you click on the icon, a pop-up window provides details on the price breaks.
- As you select items from the configuration page, ProductCart recalculates instantaneously all prices, without refreshing the page. When you change the quantity of a selected item (if the quantity field is shown), or the total quantity for the BTO product (e.g. number of business cards ordered, number of guests for the wedding reception), prices are again recalculated, and quantity discounts are applied, if any.
- You will be able to tell whether or not the selected is eligible for any quantity discounts by looking at the *Items Discounts* total at the bottom of the page. This is the total amount deducted from the price of the configured product or service thanks to quantity discounts enjoyed on any of the selected items, or on the BTO product itself.

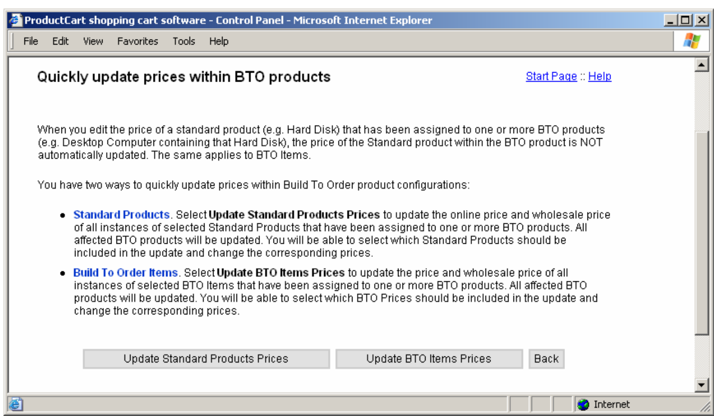
Assume that the store administrator has assigned quantity discounts to the item "2001 Zinfandel", a bottle of wine that can be selected from the "Red Wines" category when configuring a gift basket from a specialty food store. According to the quantity discounts added for the product, the unit price is reduced by 10% if the customer orders more between 3 and 6 bottles, and by 20% if the customer orders more than 6 bottles. The retail price for one bottle is $10.

If the customer enters 2 in the quantity field, no quantity discount is awarded. Assuming this is the only product selected so far, the total price for the gift basket will be $20. If the customer enters 4 in the quantity field, the order is now eligible for a discount and the total price for the configured product becomes $36. The total discount ($4) will be shown under *Items Discounts* at the bottom of the page, just above the total price (*Price as Customized*). If the customer decides to buy 2 gift baskets, the total number of bottles purchased becomes 8, the total price for the order becomes $64, and the *Items Discounts* total becomes $16.

Updating prices within BTO products

When you edit the price of a standard product (e.g. a "hard disk") that has been assigned to one or more *Build To Order Products* (e.g. a Desktop Computer containing that hard disk), the price of the *Standard Product* within the *BTO Product* is NOT automatically updated. The same applies to *BTO Items*.

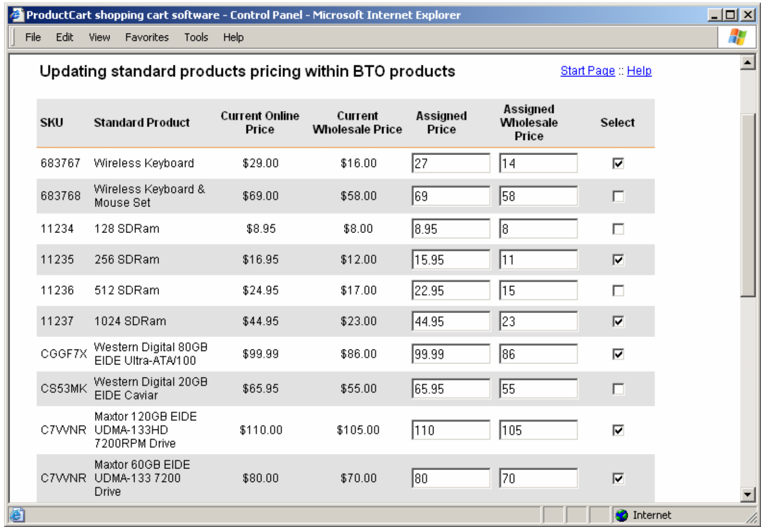
The rationale behind this behavior is that you may want to change the price of a product without necessarily changing the price of any instances of that product assigned to a *Build To Order Product*. For instance, continuing on the example mentioned above, you may decide to change the price of the "Hard Disk" when purchased as a stand alone product, but not when purchased as part of the customizable "Desktop Computer" to which it has been assigned.



However, ProductCart does allow you to quickly update prices within *Build To Order Product* configurations. From the *Manage Build To Order Products* menu, select *Updating Prices Within BTO Products*. There are two ways to update prices:

- Standard Products. Select *Update Standard Products Prices* to update the online price and wholesale price of all instances of selected Standard Products that have been assigned to one or more *BTO Products*. All affected *BTO Products* will be updated. On the page that is displayed, select the *Standard Products* that should be included in the update, and then change the corresponding prices. See below for specific instructions.
- Build To Order Items. Select *Update BTO Items Prices* to update the price and wholesale price of all instances of selected *BTO Items* that have been assigned to one or more *BTO*

Products. All affected *BTO Products* will be updated. On the page that is displayed, select the *BTO Items* that should be included in the update, and then change the corresponding prices. See below for specific instructions.



The feature works in the same way for both *Standard Products* and *BTO Items*. For each *Standard Product* or *BTO Item*, the Control Panel displays the following information:

- Current online price
- Current wholesale price
- Assigned price. This is the price that will be assigned to each instance of the selected *Standard Product* or *BTO Item* . The field is prefilled with the current online price.
- Assigned wholesale price. This is the price that will be assigned to each instance of the selected *Standard Product* or *BTO Item* . The field is prefilled with the current wholesale price.

Since different instances of the same *Standard Product* or *BTO Item* assigned to different *BTO Products* may have different prices, these prices are not shown on this page.

Use the check box next to each product to include that product in the update. Use the *Check All* and *Uncheck All* features at the bottom of the page to select or deselect all products shown.

When you press the *Update Prices*, ProductCart will display the following alert message: "You are about to update prices within all BTO products that include the items that you have checked on this page. The current price and wholesale price will be updated with the new prices listed above. Would you like to continue?"

For each checked *Standard Product* or *BTO item*, the system will replace the current price and/or wholesale price for each instance of those products assigned to *BTO Products*, with the prices entered on the page.

Appendix A

Web site home page and store home page

Your Web site's home page may or may not also be the store's home page. This is up to you. All store pages are saved in a directory on your Web server called *productcart/pc*. The file name and location of the store's home page is as follows:

http://www.yourwebsite.com/productcart/pc/mainIndex.asp

The easiest way to make your home page the store's home is to redirect your home page to this page. You can redirect a page to another page on your Web site in many different ways. An easy way to do it is to add the following META tag to the <head> section of your home page:

```
<meta http-equiv="refresh" content="0; url= http://www.yourwebsite.com/productcart/pc/mainIndex.asp">
```

You can perform the same task with an ASP page. Open a blank Notepad file, enter the following code, then save as “default.asp”. It will automatically redirect to the ProductCart home page, assuming that the “productcart” directory is located in the root. Otherwise, edit the path accordingly.

```
<% 'redirect to home page
	Response.Redirect("productcart/pc/")
%>
```

Moving mainIndex.asp to the root directory

If you plan to use ProductCart’s default home page (mainIndex.asp) as your Web site’s home page, it is a good idea to move the file to the root folder of your Web site, instead of redirecting to the page in the productcart/pc folder.

The steps to moving mainIndex.asp to your root directory are as follows:

- Define a Web site. On your local computer, create a Web site that has the same folder structure as your Web server. Refer to your favorite HTML editor’s User Guide for information on how to create a Web site. If you are using Macromedia® Dreamweaver® this means that you need to define a site (*Sites* > *Manage Sites* > *New*).
- Download files. In your local Web site, create a folder called “pc” within a folder called “productcart”. Use an FTP program to download the files header.asp and footer.asp from the “pc” folder located on your Web server to your local one.
- Move header and footer. Once you have defined a local Web site, your HTML editor can help you automatically recalculate links when you move a page from one folder to another. So open the Web site in your HTML editor, then open the files header.asp and footer.asp and resave both files in the root, which should be two levels up from the productcart/pc folder where they were originally located. Your HTML editor should recalculate the links for you so that there are no broken links in the files now that their location has changed (e.g. links to image files or other pages in the site).

- Download "index.asp". Download the file "index.asp" from the ProductCart Developer's Corner to the root of your local Web site. You can find a link to the file on the ProductCart Developer's Corner: look for the section on search engine friendliness. This is a special version of mainIndex.asp that has been restructured to work two levels above the original file. Other than that, the file is identical (i.e. it will load up to 12 featured products that you can specify using the Control Panel).
- Upload to your root folder. Upload the three files (index.asp, header.asp, and footer.asp) to your root folder using your favorite FTP program.
- You're done! Go to http://www.yourStore.com/index.asp to view the page and make sure that everything is loading properly. Remove other index pages (e.g. index.html, default.asp, etc.) that may also reside in the root. The page will now be your home page. Edit the Home Page URL in the ProductCart Control Panel (General Settings > Store Settings) to point it to this file.

For example, here are links to the two pages on one of our ProductCart demo stores. Note that other than their location and file names, the pages are identical.

Default ProductCart home page:

http://www.earlyimpact.com/productcart/demos/standard/productcart/pc/mainIndex.asp

New home page:

http://www.earlyimpact.com/productcart/demos/standard/index.asp

If you don't want to follow the instructions above, but still plan to redirect your home page to ProductCart's default home page, then make sure to use what's called a "permanent redirect". In other words, you are telling the search engine that the page has been moved permanently to another location. Create a page called "index.asp" or "default.asp" with the following code:

```
<%@ Language=VBScript %>
<%
Response.Status="301 Moved Permanently"
Response.AddHeader "Location", "http://www.yourStore.com/productcart/pc/mainIndex.asp"
%>
```

Creating your own Featured Product page

You can use the Featured Products area of the Control Panel to set the products to show on ProductCart's default home page, which is *mainIndex.asp*, located in the *pc* subfolder. If you are proficient in ASP, you can take the code for that page and use it to create your own custom home page. The code has been commented so that you can easily find your way through it.

In particular, note the part of the code where featured items are retrieved from the database and the number of featured items to display is set.

```
[...]

Dim mySQL, conntemp, rs
call openDb()
```

```
'select products that are flagged as featured items for the homepage
mySQL="SELECT idProduct, description, details, price, smallImageUrl FROM products WHERE
showInHome=-1 AND active=-1"
set rs=conntemp.execute(mySQL)

if err.number <> 0 then
        response.redirect "techErr.asp?error="& Server.Urlencode(err.description)
end if

if rs.eof then
        response.redirect
"msg.asp?message="&Server.Urlencode(dictLanguage.Item(Session("language")&"_mainIndex_1") )
end if

Dim pcPrdArray(12,5) 'If you want to load more products, change the number 12 to a different amount

pcPrdIndex=Cint(0)

'Retrieve product information from database for the number of products you want returned. 12 is the
default number of items for ProductCart's default Homepage.
do while not rs.eof and pcPrdIndex<12  '12 is set by default
        pcPrdArray(pcPrdIndex,0)= rs("idProduct")  'product ID
        pcPrdArray(pcPrdIndex,1)= rs("description") 'product name
        pcPrdArray(pcPrdIndex,2)= rs("details") 'product details
        pcPrdArray(pcPrdIndex,3)= rs("price")  'product price
        pcPrdArray(pcPrdIndex,4)= rs("smallImageUrl")  'product thumbnail
        pcPrdIndex = pcPrdIndex+1  'the index will set the number of the product as they are retrieved
from the database (1 will equal the first product retrieved and so on. Therefore pcPrdArray(0,0) will return
the product ID of the first product retrieved. the index of an array will always start at 0.
rs.movenext
loop

call closeDb()
%>
```

Product Information is there displayed as follows on the page:

```
<!-- Product #1 -->
  <% if pcPrdArray(0,0)<>"" then  'check if product is present, if yes then create the HTML %>
        <td>
        <div align="center">
        <!-- START IF IMAGE DISPLAY -->
        <!-- link image to product details page -->
        <a href="viewPrd.asp?idproduct=<%response.write pcPrdArray(0,0)%>">
        <!-- end of link -->
        <!-- if no image is present then show store's no_image.gif -->
        <% If pcPrdArray(0,4)="" then %>
         <img src="catalog/no_image.gif" width="100" height="100" hspace="3" border="0">
         <% else %>
         <!-- image is present, display image with the image alt tag showing the product name -->
         <img src="catalog/<%response.write pcPrdArray(0,4)%>" alt="<%response.write pcPrdArray(0,1)%>"
hspace="3" vspace=3 border=0>
        <% end if %>
        </a>
        <!-- END OF IMAGE DISPLAY -->
        </div></td>
        <td>
        <table border="0" cellpadding="0" cellspacing="0">
        <tr><td>
        <font face="<%=FFType%>"  color="<%=FColor%>" size="2">
        <!-- display product name -->
```

```
            <b><%response.write pcPrdArray(0,1)%></b>
            <!-- end of product name -->
            </font></td></tr>
            <tr><td>
            <font face="<%=FFType%>"  color="<%=FColor%>" size="2">
            <!-- display product details -->
            <% tempVar=pcPrdArray(0,2)
            tempVarCnt=len(tempVar)
            'limit the details to 75 characters, to lenghten or shorten the characters you can change the variable.
            If tempVarCnt>75 then
            tempVar=left(tempVar,75)
            response.write tempVar&"..."
            Else
            'if the details are shorter the 75 characters, display all
            response.write tempVar
            End If %>
    <!-- end of details -->
    <br>
    <!-- link to product details page -->
    <a href="viewPrd.asp?idproduct=<%response.write pcPrdArray(0,0)%>"> <img
src="<%=rslayout("morebtn")%>" border="0" vspace="10"></a>
    <!-- end of product details link -->
    <br>
    <!-- display the product price -->
    <% if pcPrdArray(0,3)>"0" then
response.write dictLanguage.Item(Session("language")&"_mainIndex_3") &scCurSign & money(pcPrdArray(0,3))
end if %>
    <!-- end of product price -->
    </font>
             </td></tr>
             </table>
             </td>
   <% end if %>
   <!-- End Product #1 -->
```

HTML links to main store pages

The following is a list of links to common store pages.

Store home:

http://www.yourStore.com/ProductCart/pc

Store specials:

http://www.yourStore.com/ProductCart/pc/viewSpc.asp

Browse by Category:

http://www.yourStore.com/ProductCart/pc/viewCat.asp

Browse by Brand:

http://www.yourStore.com/ProductCart/pc/viewCat_brands.asp

Catalog Search:

http://www.yourStore.com/ProductCart/pc/advSrca.asp

View cart:

http://www.yourStore.com/ProductCart/pc/viewcart.asp

Customer Login:

http://www.yourStore.com/ProductCart/pc/Custva.asp

Product Links:

http://www.yourStore.com/ProductCart/pc/viewPrd.asp?idproduct=*productID*

For example, if the productID is 168, the link would be:

http://www.yourStore.com/ProductCart/pc/viewPrd.asp?idproduct=168

You can obtain the productID from the *Manage Products / Modify Products* page.

Appendix B

ProductCart Dreamweaver® Extension

The ProductCart Dreamweaver® Extension allows users of Macromedia Dreamweaver® to easily add shopping cart links to any Web site page. Using a simple interface, you will be able to automatically add a text or image link invoking a variety of shopping cart functions: add a product to the shopping cart, load the store's search page, view specials, etc.

To install and use this extension you need to be a user of Macromedia Dreamweaver® and have the Macromedia Extension Manager installed on your computer. This extension is compatible with Macromedia Dreamweaver® 4, UltraDev, and MX.

Installation

To install this extension:

- Download the file to your system. To download the extension, visit: http://www.earlyimpact.com/productcart/dreamweaver
- Double click on the file to launch the Macromedia Extensions Manager
- Follow the instructions on the screen to complete the installation

How to insert a link

For example, let's assume that you would like to place a text link named "Search my store" in the navigation section of a certain Web page. Follow these simple steps to add the link:

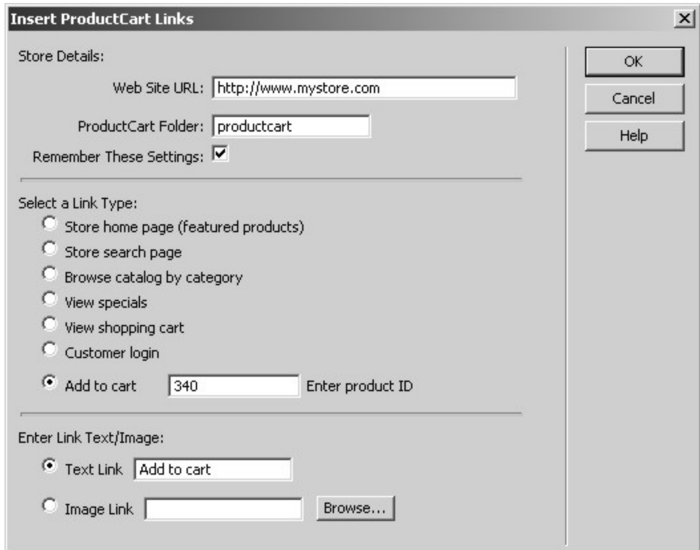
- Start Dreamweaver and load the Web site that you would like to work on
- Open the page that you would like to edit
- Place the cursor in the location where you would like to position the link
- Select "Early Impact" from the "Insert" menu, then click on "ProductCart Link...". You can also perform the same task by selecting "Early Impact" from the Objects floater, and then clicking on the ProductCart link icon
- The window shown on the next page will be presented to you. Select the type of link you would like to insert following the instructions outlined below, then click on "OK" to insert the link.

Features

The following is a description of each of the elements that appear on the "Insert ProductCart Links" window.

Store Details: Web site URL. Enter the full URL of the Web site/online store that this page belongs to. For example: http://www.mystore.com/. Make sure you enter the "http://" and the "/" at the end of the address, or the links won't work. If you would rather use relative links, edit the source code once the link has been added to the page, but make sure that the path to the folder containing ProductCart files is correct.

ProductCart Folder. Change the default value ("productcart") only if you changed the name of the folder during the ProductCart installation procedure.



Remember These Settings. Leave this check box checked if you would like Dreamweaver to remember these settings for the current Web site. The settings will only apply to the current Web site.

Select a Link Type:

Store home page (featured products). This link will point to the default home page for your ProductCart store, which automatically displays N featured products. ProductCart users: the number of featured products is defined in the ProductCart Control Panel under "Store Settings". You can select which products should be featured by using the "Discount & Promotions" area of the Control Panel.

Store search page. This link will point to your store's search page.

Browse catalog by category. This link will point to the top level directory in your store catalog, allowing your customers to browse the store by category.

View specials. This link will point to the page of your online store that displays items that you have set as "Specials". ProductCart users: your can select which items should be displayed as "Specials" by using the "Discounts & Promotions" area of the ProductCart Control Panel.

View shopping cart. This link will load a page that displays shopping cart content for the store customer who clicked on the link.

Customer login. This link will load a page that allows existing users of the online store to log into their account, and new store customers to register with the store.

Add to cart. This link allows you to add a "Add to cart" or "View details" button to any page of your Web site. The link will load a product details page for the product whose ID is entered in the input field "Enter product ID". The product details page allows store visitors to specify product options, quantity value, and add the product to the shopping cart. ProductCart users: you can view a product's ID by editing a product in the Control Panel.

Enter Link Text/Image:

Text link. Enter the text to be used for the link.

Image link. Browse your computer to locate the image to be used for the link.

Click "OK" to add the link to your page.

Appendix C

Editing messages generated by ProductCart

Most of the text messages, links and form field descriptions that you see on your storefront are not hard-coded in the ASP shopping cart pages, but rather fed automatically from a few other files. The files are all located in the *includes* folder:

- *languages.asp* contains most of the text strings.
- *languages_ship.asp* contains text strings that are related to the shipping component
- *bto_language.asp* contains text strings that are specific to the Build To Order version of ProductCart

You can edit any of the text messages. Before you do so, make sure to save a backup copy of the existing file so that you can go back to it if you needed to.

Changing the language

ProductCart is currently available only in the English language, although other languages will likely become available in the future.

However, you can translate the shopping cart interface by using the *languages.asp* file. By translating all of the text messages that *languages.asp* contains, into another language, you can change the language used by the shopping cart.

Appendix D

Replacing the “No Image Available” graphic file

Whenever you don’t upload images for a certain product, a default graphic is shown on any page that displays information about that product (search pages, product details page, etc.). You can easily replace the default graphic with your own by following these simple steps.

- Create the new image file that will be displayed whenever a product image is not available. The image should be 100 x 100 pixels.
- Save the file as “**no_image.gif**”
- Upload the file to the “productcart/pc/catalog” subfolder on your Web server, using any FTP program, or using the *Upload Product Images* module of ProductCart, which is located in the *Manage Products* menu of the ProductCart administration console.

From now on this image will be displayed whenever a product image is not available.

Appendix E

Database security

The following security tips only apply to stores powered by an Access database. They do not apply to stores using a SQL database.

MS® Access databases, unlike SQL, can be downloaded just like any other file if their location is known. Therefore, you should take the following precautions to ensure the location of your store database cannot be easily guessed.

- **Change database location and the database name**. Your store database is located in the *database* subfolder of *productcart*. You should rename the folder or move the database to another folder on your Web server, as long as it has write/read permissions. You should also rename the database to any other name. When you change the folder name, or move the database to a new location, and rename it, remember to edit the DSN or DSN-less database connection string. After doing so, make sure to either run the ProductCart activation form again, or manually edit the database connection string in the *includes/storeconstants.asp* file. Also, for added security make sure that the folder that holds the database cannot be accessed by a browser (ask you Web hosting company how to disable HTTP access to the folder).
- **Password-protect the store database**. You can password-protect the Microsoft® Access database that powers your online store. To do so, first download the database to your local machine. Then, launch Access and select *File/Open.* Locate the file that you just downloaded and open it using the *Open Exclusive* option. You can select the *Open Exclusive* option from the *Open* drop-down located in the bottom right corner of the *Open File* window (*Access 2002*). Once the database is open select *Tools/Security/Set Database Password*. Enter a password, confirm it and click *OK.*

  Upload the database back to your Web server. The database will now require a password before being opened or accessed by any application. This is true for ProductCart too. Therefore, you will need to modify the DSN or DSN-less connection to include the password information. You may easily do so by editing a filed called *storeconstants.asp* located in the *productcart/includes* folder.

  For example, if you are using a DSN connection:

  "DSN=productcart"
  becomes...
  "DSN=productcart;PWD=yourPassword"

  If you are using a DSN-less connection:

  "DRIVER={Microsoft Access Driver (*.mdb)};DBQ=c:\yourdatabase.mdb"
  becomes...
  "DRIVER={Microsoft Access Driver (*.mdb)};DBQ=c:\anydatabase.mdb;PWD=password"

- **Regularly back-up your database**. Your store database contains all the information that is visible and used on your online store: product information, order details, customer information, etc. Because strange things happen even to the most reliable Web hosting providers, make sure that you keep a back-up copy of your store database in a location other than your Web server. You should back up the database regularly.

Appendix F

SQL Installation

Overview

This document is meant as a general guideline for installing and setting up a Microsoft SQL Server database for Early Impact's ProductCart - SQL Version. This is by no means a comprehensive guide for running a SQL Server based database. For in-depth information on SQL Server, you should consult the documentation included with SQL Server or consult your Web hosting provider.

Creating the database

If the database already exists, skip this section and go directly to “Running the SQL Script”.

If you need to create a new database, follow these directions. In SQL Enterprise Manager, right-click on the "Databases" folder in the Server Manager window and select "New Database...". In the new database dialog box that appears, enter the name of the new database that you are going to use for ProductCart. Click on "OK" to save the changes.

Running the SQL Script

You can now run the SQL script located in the ‘database’ folder. The script will create all the objects you need in the database.

In SQL Enterprise Manager, find the database you want to use and highlight it in the Server Manager window. Once your Database is highlighted, click on "Tools" and select "SQL Query Analyzer". This will bring up the SQL Query Analyzer with the correct database already selected. On the SQL Query Tool Analyzer toolbar, pick the "Load SQL Script" button (CTRL+SHIFT+P). This will allow you to load the SQL script into the SQL Query Analyzer. Once the script is loaded, you will see it in the Query window.

To run the script, click the "Execute Query" button (F5) on the toolbar. The script will run and create all the objects that are needed in the database.

Setting Permissions

After you have successfully run the script, you need to assign access permissions to the database objects. The User must have full permissions on all the tables in the ProductCart database.

Connecting to the Database

If you are using a **DSN connection**, use a string structured as follows, where SQLDSN is the name you defined for the connection (e.g. “productcart”), and userid and password are the user ID and the password defined for the connection:

DSN=SQLDSN;UID=userid;PWD=password

If you are using an OLE DB connection (RECOMMEDED), use a connection string structured as follows (here “SERVER-IP” is the server’s IP address, “DB-NAME” is the name of the database, and “USER” and “PWD” are the user name and password that grant access to it):

Provider=sqloledb;Data Source=SERVER-IP,1433;Initial Catalog=DB-NAME;User Id=USER;Password=PWD;

Store Activation

You can now proceed to activating ProductCart as explained in Chapter 2.

Local settings

If you are using a SQL database that has been set up to use a regional setting different from the default one (United States), please note that there may be an issue in the way dates are saved to the database, due to a date format conflict.

If your SQL database has been setup to use the United Kingdom's regional settings, located the file:

includes/SQLFormat.txt

The variable "SQL_Format" determines the format to use. The default value for this variable is 0. Change the value to 1.

Appendix G

Renaming the “productcart” folder

All of ProductCart’s files are included in a folder called “productcart”. Following the installation instructions described in the Chapter 2 of this User Guide, you should have uploaded this folder and all of its subfolders and files to your Web server.

At any time, before or after activating ProductCart you may rename the “productcart” folder to personalize the address of your store. For example, the URL to the default home page (featured products page) is typically something like:

http://www.YourStore.com/productcart/pc/mainIndex.asp

… you may want to change it instead to something like…

http://www.YourStore.com/shop/pc/mainIndex.asp

You should not remove the “productcart” folder. To rename IT, follow these steps:

1. Locate the file “productcartfolder.asp” in the “includes” directory and download it to your local system using your favorite FTP program.
2. Open the file with Notepad or an HTML editor and change the name “productcart” to any other name that you would like to use (only use alphanumeric characters in the name). Save the edited file and reupload it to your server via FTP.
3. Change the name of the “productcart” folder to the new folder name that you have just entered in the “productcartfolder.asp” file.

In the example mentioned above, the file would be edited from…

```
private const scPcFolder="productcart"
```

… to…

```
private const scPcFolder="shop"
```

Renaming the “pcadmin” folder

At any time, before or after activating ProductCart, we recommend that you change the name of the folder that contains all the files that are used for your store's administration area (the Control Panel). By default, this folder is named “pcadmin”. By renaming the folder to something that is hard to guess, you will make it virtually impossible for hackers to find the location of your Control Panel, load the login page and run attacks against it (e.g. SQL injection attacks).

To rename the “pcadmin” folder, follow these steps:

1. Locate the file “secureadminfolder.asp” in the “includes” directory and download it to your local system using your favorite FTP program.
2. Open the file with Notepad or an HTML editor and change the name “pcadmin” to any other name that you would like to use (only use alphanumeric characters in the name). Save the edited file and reupload it to your server via FTP.
3. Change the name of the “pcadmin” folder to the new folder name that you have just entered in the “secureadminfolder.asp” file.

You are done. To log into the Control Panel, remember to edit the URL to reflect the new folder name.

Appendix H

Running ProductCart on a Server with Parent Paths Disabled

ProductCart uses the dot-dot-slash ("../") notation (i.e. parent paths) to load "include" files (files that are dynamically included into another file when the latter is parsed by the Web server) from a variety of other files. Sometimes Microsoft's Internet Information Server (IIS) is setup so that parent paths are disallowed, in which case ProductCart would not function properly.

If you activated ProductCart on a server that does not support parent paths, the server would return error messages similar to the following:

> Active Server Pages, ASP 0131 (0x80004005)
>
> The Include file '../includes/settings.asp' cannot contain
>
> '..' to indicate the parent directory.
>
> /productcart/pc/mainIndex.asp

The ProductCart Activation Wizard will detect whether the server has parent paths disabled. You can also download a simple script from the ProductCart Support Center that will help you determine whether your Web server has parent paths enabled or disabled. To download the script, go to:

http://www.earlyimpact.com/productcart/support/#other

If your server has Parent Paths disabled, you have two options:

1. You can use the PPD version of ProductCart. This is located in the “Parent Path Disabled” folder within the ZIP file that you downloaded when you purchased ProductCart. Once you have uploaded the files to your server, the steps to activating ProductCart are the same as in the Parent Path Enabled version. If you have not downloaded the file yet, please refer to the order confirmation e-mail that you received after placing your order for download instructions.
2. You can enable parent paths in IIS. Note however that some Web hosting companies may not be willing to edit this setting for you.

The PPD version of ProductCart assumes that the “productcart” folder has been placed in the root folder of your Web server’s account. If you would like to move it to a subfolder, you will have to replace the following strings globally within the “productcart” folder.

> Replace: virtual="productcart/includes/
>
> With: virtual="<path to the folder>/productcart/includes/
>
> Replace: filename="/productcart/pc/
>
> With: filename=”/<path to the folder>/productcart/pc

If you have renamed the ProductCart folder, you will also need to replace the above strings globally to reflect the different folder name (if “productcart” is in the root, use the same strings listed above, but remove the <path to the folder> portion).

Appendix I

Generating a License for a Downloadable Product

Overview

This appendix describes how you can successfully build a license generator that interfaces with ProductCart's Downloadable Products Module.

This topic requires a working knowledge of ASP. Non-technical users of ProductCart are encouraged to outsource this portion of the store setup to a third party that may help them custom program a license file that at the same times meets their license requirements, and correctly interfaces with ProductCart. You can find a list of developers that have an in-depth understanding of ProductCart at the following URL: http://www.earlyimpact.com/partners.asp

The Downloadable Product Module was built under the assumption that Downloadable Products may require a license to be delivered to the customer to unlock/install/use the product after it has been downloaded. The system also assumes that each Downloadable Product available for purchase on the store may need a different type of license (e.g. a software product may need a *Serial Number* to be delivered with the purchase; another one may need a *User Name* and a *Password*).

When you add or modify a Downloadable Product you can specify the name of the license file to be used to generate license information for that product. ProductCart includes a **default License Generator** that should be used as the **starting point** for creating custom license generating scripts. The following paragraph describes the ASP code that the file contains.

When hosted on the same Web server where the store is located, all license generators should be placed in a subdirectory of the *pcadmin* folder called *licenses*. On the *Add/Modify Product* pages, just enter the file name, not the path to the file. You can also host the license generator on a remote Web server. In that scenario, enter the full URL to the file, including the *http://*

Default License Generator

The default license generator contains the ASP code included in the file:

pcadmin/licenses/myLicense.asp.

The code is heavily commented to help you understand how a license is being generated.

The section of the code designed to host your license generating script is the one included between the comments BEGIN LICENSE GENERATOR CODE and END OF LICENSE GENERATOR CODE.

You should not need to edit the rest of the code.

If you open the file using Notepad or your favorite HTML editor you will notice that the top part of the code sets the license variables. Then, these variables are assigned values using the license generating scripts that you will create. The default License Generator contains some sample scripts that return random numeric or alphanumeric strings.

You don't need to assign a value to every one of the 5 license key variables. One or more can be empty. For example, if you only need three pieces of information, you would leave the last two variables blank, using the code:

```
Tn4=""
Tn5=""
```

The bottom part of the code looks at the quantity ordered for the selected Downloadable Product and calls the license generating function as many times as needed. So if a customer ordered 3 units of a software application that requires a Serial Number to be delivered with the download link, ProductCart would generate 3 Serial Numbers and include all of them in the order details and order confirmation e-mail when the order is processed.

Testing a Custom License Generator

You can use ProductCart to test your custom License Generator. Right after you have added a Downloadable Product to the store, click on *Modify this product again* on the confirmation page, or select *Edit* after locating the product. You will notice that compared to the *Add New Product* page, the form now contains a *Test License Generator* button located towards the bottom of the page. When you click on it, ProductCart will pass sample order information to the license generator, and returned the results in a pop-up window.

For example, a test performed using the default license generator returned the following results in the *Test License Generator* pop-up window:

Demo Data.

Order ID: #5236
Order Date: 11/23/2003
Process Date: 11/23/2003
Customer ID: 125
Product ID: 406
Quantity: 1
Product SKU: EIBM1257A

Returns:
Order ID: #5236
Product ID: 406
Temporary User Name: 653753
Temporary Password: dn6t346w1j7z
License Key: JHsCEPsU9nt9F4t00i77f27v
Serial Number: A57YgM8BB3VU2HV8cPVa2nWd
Winning Lottery Numbers: cLwvIi4Y1240JO471m58j3Nz

When Licenses are Generated

Licenses are generated when the order status is updated to *Processed*. For more information about when ProductCart updates an order's status to *Processed*, please review the *Order Management* section of this User Guide.

License information is delivered to customers in two ways:

- Through the order confirmation e-mail (unless you instructed ProductCart not to send a confirmation e-mail upon processing the order).
- Through the *View Previous Orders* section of the *Customer Service* area of the storefront.

Appendix L

Technical Notes on how Shopping Cart Content is Stored

When products are added to the shopping cart, ProductCart holds the information into an array called pcCartArray. The array is first created when a ProductCart session is started (see Appendix M), using the syntax:

dim pcCartArray(100,35)

The array holds up to 100 different products and 35 variables for each product. This means that ProductCart has a structural limitation to allowing for 100 different products added to the shopping cart at any given time. The limitation is meant to limit the amount of server resources reserved for the task. This is typically never a problem as customers don't normally add 100 different items to the shopping cart. However, if you need to allow your customers to add more than 100 different individual products, you can do so by performing a global "find & replace" on the strings:

dim pcCartArray(100,35)

and

redim pcCartArray(100,35)

replacing the number "100" with a higher one.

If you are customizing ProductCart, you may need to store additional product variables in the array and/or retrieve existing variables. The following table provides details on what each element of the array stores.

Item	Content
0	ID of the product. Uniquely identifies the product.
1	Product name
2	Quantity being purchased
3	Product price
4	Name of Option A
5	Option price
6	Total weight for the product
7	Product part number (SKU)
8	Name of Option B
9	Delivery Time.
10	Removed. Whether the product has been removed from the shopping cart.
11	Option A identifier
12	Option B identifier
13	Product supplier. This is currently not in use.
14	Product cost. This is currently not in use.
15	Discounts.
16	XX
17	Product's default price (online price).
18	Type of customer (retail vs. wholesale).
19	Whether the product is tax-exempt.
20	Whether the product has free/no shipping.
21	Custom input field data.

22 Reward Points
23 Whether the product is oversized.
24 Tax product array (when more then one tax is used)
25 Option A price
26 Option A price with Currency Sign
27 Option B price
28 Option B price with Currency Sign
29 Not currently in use
30 Build To Order: Items Discounts
31 Build To Order: Additional Charges

Technical Notes on the Order Status

The order status can be found in the *orderStatus* column of the *orders* table. The value is always an integer between 1 and 6. Below is a description of each of the values. Refer to Chapter 11 for more information about each order status.

Note that orders are first saved to the database when a customer clicks on the "Continue" button on the order verification page (*pc/orderVerify.asp*), before getting to the payment details page. The page that saves data to the database is *pc/SaveOrd.asp* At that point, no payment information has been collected from the customer. Therefore, ProductCart considers the order "incomplete".

Value	Status
1	Incomplete
2	Pending
3	Processed
4	Shipped
5	Cancelled
6	Returned

How Order Information is Saved to the Database

Orders are saved to the ProductCart database using the following tables:

- *Orders*. The orders table contains details about the customers' billing and shipping address, shipping and payment options used for the order, discounts applied, and more. The details field in the orders table contains a summary of the products purchased. Don't use this field if you need to query which products were part of the order. Use the *ProductsOrdered* table instead.
- *ProductsOrdered*. Contains a list of the products that were part of any order. Each product is represented by one record in the database. The *idOrder* field contains the order number to which the products belong. Orders that contained multiple products are represented by multiple records that share the *idOrder* value.
- *authorders*. Contains transaction details for orders that were placed using Authorize.Net and Payflow Pro set up in AUTH_ONLY state, where transactions are authorized, but funds are not captured. The information in this table is used by the batch processing feature to return transacton details to Authorize.Net so that funds may be captured. Credit card details are stored in an encrypted format.
- *pfporders*. Same as *authorders*, but used when the payment gateway is Payflow Pro.

- *CreditCards*. Contains credit card information, including encrypted credit card numbers, for the orders that were placed using offline credit card processing as the payment option.
- *CustomCardOrders*. Contains custom card orders for orders that were placed using a custom card (e.g. store debit card). Since a store could be using multiple custom cards, and each custom cards may have information (fields) that is unique to it, order information is saved in this table using the following approach: each row represents one of the N values that the selected custom card option prompted the user to provide during checkout.

Appendix M

Starting a ProductCart Session

If you are customizing ProductCart or integrating the shopping cart with another ASP application, you may need to start a ProductCart session outside of the default storefront files that already do so.

ProductCart starts a user session on a variety of storefront pages. Of course, a session is started on the default home page (pc/mainIndex.asp). In addition, a session is started on all storefront pages that could be a "landing" page for customers that visit the storefront. For example, the product details page (pc/viewPrd.asp) starts a session if one is not already active.

ProductCart does not use *global.asa* files due to the potential conflicts that this approach might create with other applications that are already running on the Web server.

Below is the code that is used on these 'entry' pages. Add it to a custom ASP page to start a ProductCart session on that page.

```
'---> start store session if not aleady initiated <----
if session("idcustomer")="" then
	session("idPCStore")= scID
	session("idCustomer")=CLng(0)
	session("idAffiliate")=CLng(1)
	session("language")=Cstr("english")
	session("pcCartIndex")=CLng(0)
	dim pcCartArray(100,35)
	session("pcCartSession")=pcCartArray
end if
if session("idPCStore")<>"" AND session("idPCStore")<>scID then
	session.Abandon()
	session("idPCStore")= scID
	session("idCustomer")=CLng(0)
	session("idAffiliate")=CLng(1)
	session("language")=Cstr("english")
	session("pcCartIndex")=CLng(0)
	redim pcCartArray(100,35)
	session("pcCartSession")=pcCartArray
end if
```

Appendix N

Security Recommendations

We encourage you to use the following security precautions to minimize the chance of unauthorized access to your ProductCart Control Panel and store database.

- **Rename the "pcadmin" folder** as describe in Appendix G.
- **Protect your MS Access database** as described in Appendix E. This includes renaming the database, the folder that contains the database, removing browser access to that folder, and password protecting the database file itself. These recommendations do not apply to stores using MS SQL.
- **Use SSL**. The use of a SSL (Secure Socket Layer) certificate ensures that all data exchanged between the browser and the Web server is encrypted. For more information about which SSL certificates are supported by ProductCart, please refer to the System Requirements section of this User Guide. SSL can be used both on the storefront and the Control Panel.
    - Storefront. The use of SSL ensures that sensitive information - such as credit card numbers - is submitted via the secure HTTPS protocol. Please refer to the Store Settings section of this User Guide for more information.
    - Control Panel. If you are using a dedicated SSL certificate, you can force all Control Panel pages to load through the HTTPS protocol. To do so, place the following ASP code at the very top of the file "pcadmin/AdminHeader.asp".

```
<% Response.Buffer = True
If (Request.ServerVariables("HTTPS") = "off") Then
   Dim xredir__, xqstr__
   xredir__ = "https://" & Request.ServerVariables("SERVER_NAME") & _
           Request.ServerVariables("SCRIPT_NAME")
   xqstr__ = Request.ServerVariables("QUERY_STRING")
   if xqstr__ <> "" Then xredir__ = xredir__ & "?" & xqstr__
   Response.redirect xredir__
End if %>
```

    If you are using ProductCart v2.6 and above, you will find this code already on the page. Simply remove the apostrophe at the beginning of each line to enable to code.

- **Regularly change your Control Panel password**. You can do so from within the Control Panel, under "General Settings/Change Password". We recommend that you change your Control Panel password every month or two, and whenever someone that had access to it no longer works for your company.
- **Regularly backup your store**. Regularly backup your store to ensure quick and effortless recovery in case your store needs to be restored for any reason (e.g. hardware failures, unauthorized access, change of Web server, change of Web hosting company, etc.). This task should be performed on a weekly basis, more often for busy stores. You should back up the following store data:
    - Your store database (if you are using MS SQL, enquire with your Web hosting company to find out how often they back it up for you)
    - The "includes" folder, which contains a variety of store settings (include in backup when you have edited any of the store settings)

  - Any ProductCart files that you have modified to better meet your needs (include in backup any file that was recently edited)

- **Disable directory browsing**. When directory browsing is disabled, Web site visitors cannot view a tree of the folders that exist within the Web site. Contact your Web hosting company to ensure that they have disabled directory browsing.

- **Remove or rename cmd.exe**. If you are hosting your store on your own dedicated Web server, then this security tip can help you further reduce the chances of unauthorized access to the Web server. The objective of a hacker attack is often to gain full control of the victim's computer. Hackers often do so by accessing a program called cmd.exe, which allows you to execute commands on the system. We recommend that you rename, move, or restrict access to cmd.exe. Renaming it or limiting its use to members of the administrator group removes this vulnerability. This is not a generally needed file for a Web server and if it doesn't exist then it is impossible for an attacker to gain access to it.

- **Edit the Print Settings in Internet Explorer**. If you print out order invoices from the Control Panel and send them to your customers, note that Internet Explorer by default prints the complete URL to the page at the bottom of the document. You can easily change this setting in Internet Explorer by selecting *File* > *Page Setup* and removing the characters that appear in the *Footer* field.

Protection of Sensitive Information

At Early Impact we are very committed to doing all we can to protect the privacy of your customers' information, as well as the security of your store. To this extent, we have equipped ProductCart with features aimed at minimizing the chances of unauthorized access to any confidential information, as well as with features that ensure that sensitive information is properly managed when stored in the system database.

Here is a list of features and system behaviors related to the security of sensitive information.

- **Password-protected administration**. ProductCart's Control Panel is password protected. Only authorized users have access to your store's administration area. Please refer to the Security Recommendations listed in the previous section of this User Guide to minimize the chances of unauthorized access to the Control Panel.

- **Password-protected customer account area**. Customers can view information about previous orders, edit their billing or shipping addresses, etc. only after logging into their account area. Credit card information is never shown, even after they have logged in.

- **Encryption of sensitive data**. All passwords, credit card numbers, Authorize.Net login ID and transaction key, are saved to the ProductCart database in an encrypted format. Data is encrypted using the ProductCart License Key, which is not stored in the store database.

- **Second layer of protection on sensitive data**. All account names and passwords for any payment gateway used by the store are not shown to the store administrator once they have been saved to the database. In other words, the store administrator cannot view through the ProductCart Control Panel the use name (or login ID) and password (or transaction key) associated with a payment gateway when modifying the payment gateway's settings in the Control Panel.

- **Storing of credit card information**. Credit card information is not saved to the store database except for when it is required for the proper functioning of the store. Specifically, credit card information is saved to the store database, in an encrypted format, only in the three following scenarios:

- When the store is using “Offline Credit Card Processing” as a payment option. In this scenario, credit card numbers must be saved to the store database to allow the store administrator to manually process the transaction at a later time using a POS system.
- When the store is using Authorize.Net’s Advanced Integration Method (AIM) in AUTH_ONLY mode. In this scenario, credit card data is stored in the database in an encrypted format to allow for the batch processing of previously authorized transactions.
- When the store is using VeriSign Payflow Pro in Authorization mode. In this scenario, credit card data is stored in the database in an encrypted format to allow for the batch processing of previously authorized transactions.

In all other cases, credit card information is not saved to the store database.

Regardless of whether or not credit card information is stored in the database, this information is never included in any e-mail correspondence (e.g. order notification and/or confirmation e-mails).

- **Purging of credit card information**. ProductCart v2.6 and above allow merchants to remove credit card information that was stored in the system database in one of the three scenarios mentioned above. This feature allows the store administrator to delete sensitive information that is no longer needed (e.g. orders have been processed and cannot be returned).
- **Validation of uploaded file types**. All shopping cart pages that allow for the upload of files to the system include code that validate for unsafe file types. For example, this applies to scenarios such as a customer uploading a graphic associated with a previously saved order, the administrator uploading a product image or importing a product database, etc. Only harmless files are allowed to be uploaded to the system.
- **SQL injection prevention**. ProductCart features a number of features aimed at minimize the chances of a SQL injection attack on stores using a SQL database. This includes effective form field validation to check user input for malicious code.

Appendix O

Technical Notes on Tax Data Files

If you opt to have ProductCart calculate taxes using a tax data file, the file that is uploaded to ProductCart must be a CSV file (comma separate value). As mentioned elsewhere in this User Guide, ProductCart has partnered with Tax Data Systems to allow you to purchase a subscription to updated data files. These files are already formatted using the correct file format.

If for any reason you need to edit the file or if you elect to create a tax data file from scratch because you decide to no longer subscribe to Tax Data Systems' service or elect to subscribe to a different service, then you must format the file as indicate below.

- The file must have 5 columns
- The columns must be named exactly as shown below
- The values entered in the column fields must adhere to instructions shown below.

Required Column Name	**Value**	**Example**
ZIP_CODE	5-digit numeric value	94109
COUNTY_NAME	Alphanumeric	LOS ANGELES
CITY_NAME	Alphanumeric	HOLLYWOOD
TOTAL_SALES_TAX	Numeric	0.0825
TAX_SHIPPING_ALONE	Either Y of N	N
TAX_SHIPPING_AND_HANDLING_TOGETHER	Either Y of N	Y

NOTES:

- **Do NOT alter the column names**. They are used by ProductCart in the source code of the file that calculates taxes. If you alter the column names, the calculation will not work properly.
- If you want to charge taxes only on the handling fees, but not the shipping charges (many US states do this), enter "N" and "Y" in the fifth and sixth columns respectively. When **TAX_SHIPPING_AND_HANDLING_TOGETHER** is set to **Y** and **TAX_SHIPPING_ALONE** is set to **N**, this means that taxes will be applied only to the handling fees. If the handling fee is built into the shipping charges (ProductCart allows you do so when configuring shipping options), only the handling fee portion of the shipping charges is taxed.
- **COUNTY_NAME and CITY_NAME** are used if more than one instance of the zip code is found in the tax file. The user is then prompted to select which city/county combination that the shipping address is located in. The information is shown in a drop-down menu. If there are no values for these fields, then the drop-down menu will not contain any entries and the customer will NOT be able to complete the checkout process. Therefore, if you do not have the information needed to fill out these fields, you MUST ensure that there is only one instance of any given ZIP code in your file.

Appendix P

Technical Notes on E-mail Messages Sent by ProductCart

The following is a list of files that send e-mail messages in ProductCart. The table lists the ASP page involved in the task, whether the e-mail message is created using code in the page ("Self") and/or by using another file, and what the purpose of the message is. The files are listed alphabetically, grouped by directory.

ASP File	Builds Email in…	Purpose
pc\Affretreivepassword.asp	Self	sends password to affiliates
pc\contact.asp	Self	"Contact Us" form
pc\gwreturn.asp	Self, and adminNewOrderEmail.asp, customerOrderConfirmEmail.asp	sends new order info to admin; "order received" to customer, "order confirmed" to customer; "order processed" to affiliate
pc\mySubmitQuote.asp	Self	"quote submitted" notice to admin
pc\NewAffb.asp	Self	"new affiliate" notice to admin
pc\OrderVerify.asp	Self	"new customer" notice to admin
pc\paymntb_c.asp	Self, and adminNewOrderEmail.asp	"New Order in your store" notice to admin; "Order Received" notice to customer
pc\paymntb_customcard.asp	Self, and adminNewOrderEmail.asp	"New Order" in your store notice to admin; "Order Received" notice to customer
pc\paymntb_o.asp	Self, and adminNewOrderEmail.asp	"New Order" in your store notice to admin; "Order Received" notice to customer
pc\referral.asp	Self	sends referral email to referree
pc\retreivepassword.asp	Self	sends password to customer
pc\rmathankyou.asp	Self	"Return Auth. Request" notice to admin
pc\saveNewCust.asp	Self	"new customer" notice to admin
pc\SaveOrd.asp	Self	"new customer" notice to admin
pc\useraddfeedback.asp	Self	"new message related to order" notice to admin
pc\userviewfeedback.asp	Self	"new message related to order" notice to admin
pcadmin\adminaddfeedback.asp	Self	send admin feedback to customer
pcadmin\adminviewfeedback.asp	Self	send admin feedback to customer

pcadmin\batchprocess_auth.asp	sendmailCustomerProcessed.asp	"order confimation" notice to customer (batch)
pcadmin\batchprocess_netbill.asp	sendmailCustomerProcessed.asp	"order confimation" notice to customer (batch)
pcadmin\batchprocess_pending.asp	sendmailCustomerProcessed.asp	"order confimation" notice to customer (batch)
pcadmin\batchprocess_pfp.asp	sendmailCustomerProcessed.asp	"order confimation" notice to customer (batch)
pcadmin\batchshiporders_submit.asp	Self	"order shipped" notice to customer (batch)
pcadmin\CreateReplyEmaila.asp	Self	sends Quote reply to customer
pcadmin\modrmaa.asp	Self	sends RMA Request update to customer
pcadmin\newsWizStep4.asp	Self	sends test message within Newsletter Wizard
pcadmin\newsWizStep5a.asp	Self	sends newsletter to selected customers
pcadmin\processOrder.asp	Self, and sendmailCustomerProcessed.asp	sends Order via Affiliate notice to Affiliate; "Order confirmation", "Order Shipped" notice, and/or "Order Cancelled" notice to customer
pcadmin\rmaAdminRequest.asp	Self	sends RMA Request update to customer