X-Cart Shopping Cart Software

Reference Manual

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This is the Reference Manual for X-Cart shopping cart software, v. 4.0.x. This manual covers most of the areas of X-Cart installation and use and is applicable for both X-Cart GOLD and X-Cart PRO versions.

X-Cart Shopping Cart Software Reference Manual

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Welcome to X-Cart 4.0.x

Welcome to X-Cart shopping cart software! It is with pleasure that we introduce this professional online store solution specially designed to help you get a state of the art and customer friendly e-commerce store as quickly and efficiently as possible. At an affordable cost you get powerful, highly configurable, yet easy to use software furnished with every feature that an advanced user needs, yet with an interface that even a novice will love.

X-Cart uses Smarty PHP technology and SQL database to deliver an 'out-of-the-box' e-commerce solution and a powerful customizable store builder. X-Cart is open-source software, the template-based structure and optimized programming code of which enable you to customize your online store making it exactly what you want it to be.

With its ability to handle a practically unlimited number of products, intuitive interface, easy site navigation and product search support, X-Cart ensures the positive experience of your customers buying things online.
X-Cart web-based e-commerce administration allows you to control every aspect of your business virtually making the process of operating your online shop point and click easy.

A completely customizable front end, integrated users and products management system, news list manager interface, advanced web-site promotion tools, search engine optimization, multi-language support, variety of tax and shipping calculation options are just a few features capable of raising the competitive capacity of your store on the ever-changing ecommerce market.

We are hoping you will find X-Cart can really help you increase your business productivity and boost your online sales.

Part

1

1 Introduction

1.1 Getting Help

This Reference Manual is the official documentation for X-Cart shopping cart software. It is available online (http://www.x-cart.com/xcart_manual/online) or may be downloaded from the ' SUPPORT > Files & manuals' section of our website (http://www.x-cart.com/manuals.html).

The latest version of X-Cart FAQ and troubleshooting information is available via 'SUPPORT > Files & manuals' (http://www.x-cart.com/support_troubleshooting.html).

Additional information about X-Cart shopping cart software can be requested by using a special form in the 'CONTACT US' section on our website (http://www.x-cart.com/contact_us.html) or by posting a message to sales@x-cart.com.

If you are a registered client, you can get customer service and technical support via your personal Help Desk account (https://secure.qualiteam.biz).

X-Cart-related topics can be discussed with other X-Cart users at our community forums (http://forum.x-cart.com).

1.2 Key Features of X-Cart E-Commerce Software

X-Cart is a professional, yet easy to use shopping cart software solution ready to effectively meet challenging business requirements and deliver outstanding results.

X-Cart includes all the necessary tools required to build a successful e-commerce store. Here is a list of some X-Cart shopping cart software features.

X-Cart GOLD

Designed for small and medium ecommerce websites, X-Cart GOLD allows you to run an online store with practically unlimited number of products.

Setup and support

- No programming required
- Web-based installation wizard

- Complete store-builder package

- Easy-to-use web interface

- Out-of-the-box storefront system

- Bulk uploading of products and pictures

- Customizable localization: multi-lingual interface, configurable currency symbol and weight/ dimension measurement units, configurable list of states/provinces

- Free customer support

- Free access to all future releases

- Built-in self-upgrade engine

Design and layout

- 100% template-based storefront

- Fully customizable design & layout

- A choice from several pre-designed template schemes and color sets

- Intuitive navigation

- Support for thumbnails

- Category thumbnail images

- Side-bar "mini-cart" viewable at all pages

- Integrated store search

- Built-in template editor: preview, edit and restore templates

- WYSIWYG text editor (webmaster mode)

- CSS-compatible design. Cascading Style Sheets allow you to easily change the styling of your pages.

- Debugging console: displays a tree of templates for all the pages

- The possibility to find, create and modify static HTML pages

- HTML emails

Customer care

- Storing all orders in MySQL database

- Orders history support (customers can search for & view their personal orders)

- Real time order tracking

- Customer can choose between account registration and express checkout

- Password reminder for customers

- Saving a customer's cart till the next visit

- Ability for your customers to choose the most convenient delivery and payment methods

- Memberships and special pricing for different membership levels
- News lists subscription
- Wish list
- Customizable e-mail notifications/invoices
- Printable invoices

Product catalog

- Unlimited number of products
- Unlimited number of categories
- Unlimited category nesting
- Members-only categories
- "Featured Products" list
- Automated display of bestsellers
- Related products, up selling and cross selling
- 1-click enable/disable switch for products and categories
- Support for up to two different currencies
- Automatic currency conversion
- Advanced product search

Product details

- Unlimited product options/variants/properties w/optional price modifiers
- Unlimited custom input fields for products
- HTML-enriched product descriptions
- Unlimited number of product images
- Ability to store images in the database or on the file system
- Multi-homed products (ability to list a product in multiple categories)

Merchandising and inventory

- Discount coupon codes and Gift Certificates
- Full inventory control
- "Out of Stock" Messages
- Global discounts
- Retail and wholesale prices
- Minimum order amount limit

Shipping and tax

- Real-time USPS, FedEx and Canada post shipping calculations from one location
- Integrated UPS Online ® Tools
- Unlimited number of custom-defined delivery methods
- Flat rate, weight, order total and per-item based shipping
- Different weight limits for different delivery methods
- Markups for real-time shipping
- Ability to define "free shipping" for products
- Promotional "free shipping" coupons for your customers
- Ability to define handling/freight surcharges
- Ability to handle international, domestic and local shipping
- Ability to restrict shipping by location
- Full support for downloadable products (e-goods)
- Fully customizable taxes
- Product-specific taxes
- Calculation of taxes & shipping fees depending on the client's location
- "Tax exempt" feature

Payment Gateways and Methods

- Ability to accept payments in any currency
- Processing of payments via several online payment modules
- Real-time credit card processing:
  - 2CheckOut
  - 2Checkout. Version 2
  - 3Delta Systems
  - A1M Platform
  - AccessPoint (MerchantManager)
  - ANZ eGate
  - AsiaDebit
  - Authorize.NET
  - Authorize.Net eCheck
  - Authorize.Net AIM
  - Authorize.Net SIM

- Bank of America

- Bean Stream

- BiBit

- BluePay

- Caledon

- Cambist

- Cardia

- Cardia Shop 2.0

- Censeo (dialog)

- Censeo (no dialog)

- CentiPaid

- Clear Commerce (PayFuse)

- CyberCash

- CyberPac (LaCaixa)

- CyberSource

- DataTrans

- DeltaPAY

- DirectOne

- Direct Payment Solution: PX POST

- E-Dinar

- E-Gateway (Mantis Technologies)

- E-Gold

- EasyPay

- ECHOnline

- EFSnet

- ePDQ

- Epoch Systems

- eProcessingNetwork. Transparent.

- eSec.Direct

- eSec.ReDirect

- eSelect Plus

- eWAY. Shared payment

- eWAY. XML payment

- EZic. Direct mode V3.x method

- EZTP

- FirePay

- GestPay

- GlobalCommerce

- GoChargeIt

- GoEmerchant

- GoEmerchant XML

- GZS:PayMaster

- HSBC Secure E-Payment Service

- iDeb

- Innovative E-Commerce

- IntelliPay: ExpertLink

- InternetSecure

- IO*NGate

- iTransact (Process USA). XML scheme

- Jettis

- LinkPoint

- Lynk Systems

- Money Bookers

- MultiCards

- MultiPay

- NetBanx

- Netbilling

- NetPay

- NetRegistry e-commerce

- Nochex

- Ogone

- Ogone (web)

- Pasat Internet

- PayBox

- PayByCheck

- PayByCheck. XML

- PayGate

- PayGateway

- Payment Express. Hosted payment page

- PayNet

- PayPal

- PaySystems

- PaySystems Client

- PayWeb

- PayZip.Net: Server2Server

- PayZip.Net: Web2Web

- PlugnPay. Remote Auth method

- PlugnPay. Smart Screen method

- PRI. POST Interface

- PRI. WEB Interface

- PRI. XML Interface

- Protx VSP Direct

- Protx VSP Form

- ProxyPay3

- PSIGate

- PSW Billing

- RTWare: ADC Direct Response

- Saferpay

- Scopus Tecnologia

- SECPay

- Secure-I

- SecurePay

- SECURETRADING

- SkipJack

- Slim CD

- Smart people

- SmartPag

- SurePay

- TransFirst eLink

- Triple Deal

- Trolley Gateway

- TrustCommerce

- USAePay

- uSight

- VaultX

      - VelocityPay

      - VeriSign Link

      - VeriSign PayFlow Pro

      - viaKlix

      - viaKlix 2.0

      - Way2Pay

      - WebCraft

      - Wells Fargo

      - World Swift

      - WorldPay

      - WTSbank

      - YellowPay

      - YourPay

      - ZipZap

- Manual (offline) credit card processing

- PayPal payments

- Support for checks, purchase orders and phone orders

Sales Analysis and Tracking

- Comprehensive statistics:

      - Number of store users, products, categories and orders

      - Product and category views

      - Products removed from cart by customers

      - Sales by product / best sellers

      - Total sales

      - Top paths through site

      - Shopping cart conversion funnel

      - Log in history

      - Visitors environment statistics

      - Search statistics

- Searchable order data

- Easily printable order data

- Printable shipping labels

- Search engine & incoming traffic tracker: the cart keeps referrer data for all customers

- Export of sales & customer data for use in a spreadsheet
- Export of orders to QuickBooks format

Search Engine Friendliness

- Pages can be indexed by all major search engines
- Custom META tags can be defined for every category
- Customer referrer info is stored in the database
- Static HTML catalog can be generated

Database and Platform Compatibility

- Open source PHP code
- Support for UNIX/Linux, Windows and Mac OS X servers
- Powered by MySQL database
- Multi-language support: your e-store can work with unlimited number of languages
- Multi-lingual products
- Multi-lingual categories
- Multi-lingual product options
- Payment processing modules for all major gateways
- Flexible implementation: you can easily add new features and/or disable existing ones.

Repeat Customer Accommodation

- Storing customers' data in the database
- Greet visitors module
- Registered customers can be offered discounts
- Registered customers do not have to enter their data again
- Registered customers can edit their profile
- Registered customers can access history of their orders
- Real-time order tracking for registered customers
- Moderated product reviews and ratings

Web-based Control Panel

- Password-protected administrative access
- All changes are real-time
- Control the cart from anywhere in the world using your web browser

- Unlimited number of admin accounts
- Support for restricted "shipping/fulfillment" admin accounts
- User-defined date/time format

Security

- Full HTTPS/SSL support
- Secure HTTPS/SSL administrative access
- Password-protected administrative access
- Encrypted customer data
- Alternative data encryption methods
- Real-time security notifications of all failed login attempts
- Backup sub-system

X-Cart PRO

X-Cart Pro is a special edition of X-Cart software designed to be operated in multi-vendor mode (though it has the ability to operate in single-vendor mode as well). X-Cart Pro allows multiple product providers (vendors) to share a single store (with a single set of templates) for selling their products. Each provider manages his own products, orders, taxes, shipping, etc independently of the other providers. However, the store has a joint catalog and a common checkout point, so the customer needs to place only one order. Customers see it like a single shop with different products, and they can purchase products from different providers at a time, and will get a notification from each provider they've bought products from. Respectively, each provider will get orders for his products only.

Summing it up, X-Cart Pro extends the features of X-Cart Gold by adding specific functionalities:

- Unlimited number of isolated provider/seller accounts
- Sellers/providers can edit only products belonging to them
- Different vendors can have different shipping/tax settings
- Admin account is separated from provider/seller accounts

X-Cart Pro solution is ideal for:

1) Online stores selling products from multiple suppliers.

2) Web-supermarkets with several departments.

3) Online distributors/wholesalers.

4) Internet malls with joint catalog.

Note. Although X-Cart is a turnkey ecommerce shopping cart that is ready to go online, it can be tailored to suite your business. Our development staff will be happy to discuss custom development services to suit your needs.

Related topics:

X-Cart 4.x features

Licensing

1.3   X-Cart 4.0.x features

X-Cart 4.x is a new step in X-Cart shopping cart software development.

The key features for 4.0.x versions include:

• Improved categories management mechanism (unlimited categories);

• Inventory tracking based on product options;

• New payment gateways support;

• Airborne (DHL) ShipIt API support;

• RMA (Return Merchandise Authorization) add-on (will be released later);

• Ability to sort out products on the customer storefront;

• Customer area scripts moved up to the root directory of X-Cart;

• New HTML template for invoice;

• HTML-format for e-mail notifications turned on by default;

• HTML code in the templates brought to conformity with specification on HTML 4;

• A more flexible tax management system;

• Smarty template engine upgraded up to version 2.6.3;

• Ability to select UK or Canada pre-configuration during X-Cart installing;

• Fully multilingual interface, including admin/provider part;

• Considerably improved usability of administrator/provider interface;

• Memory usage optimization;

• New integrated 'UPS OnLine ® tools' module, supporting not only shipping rates calculation, but providing an address validation tool and the possibility to register a UPS account via X-Cart site;

• New integrated 'Manufacturers' module enabling you to classify your products by the brand names;

• New integrated 'News Management' module enabling you to have multiple news lists for your customers;

• Printable version for all information pages in the customer zone;

• Additional options enabling you to optimize your e-store for search engines;

• Gathering of statistical data on product search queries in the customer zone and on the client's environment (browser type, screen resolution, operating system, JavaScript support);

• Renewed first page in the administrative zone: new orders statistics and top sellers info are added;

• Customizable product search form, extended set of search fields;

• Simultaneous editing of multiple products;

• Ability to adjust the registration form for different user types;

• Antifraud module: verification of the customer's address in the process of checkout (check-up information can be included into the order details);

• Ability to edit the options of a product contained in the shopping cart;

• Ability to export products in Froogle format.

Performance

X-Cart shopping cart software does not have any limitations as to the number of products it can handle. However, the actual product holding capacity of your X-Cart based store will depend on the performance of the server on which your store will be run and on the amount of memory space reserved for the store. Mind that the larger number of products your store will hold, the longer it will take to load the store pages.

We tested the performance of X-Cart v.4.0.4 on our local servers after the optimization of SQL requests and code, and the results are the following:
1. For a store with 3000 categories and 10,000 products: page loading time is 2-4 seconds (in comparison with 4-5 seconds before the optimization).
2. For a store with 6000 categories and 150,000 products: page loading time is 4-5 seconds.

We believe using X-Cart 4.x software will bring you brand new experience of managing an online store and will become sturdy support for your business. We surely will keep doing our best to improve our product in the future. We would appreciate hearing any comments you may have regarding the functionality being offered or features you would like to see us offer.

1.4   Licensing

This chapter is a 'plain words' explanation of our licensing policy, ***not*** a legal document.

Obtaining a license

To use X-Cart shopping cart software, you are required to have a license. A license can be obtained in one of the following ways:

• by purchasing X-Cart shopping cart software from our company (license is granted to you directly);

• by purchasing X-Cart shopping cart software from one of X-Cart users (license is transferred).

No matter which of the above ways you choose, at the time of purchase you will be supposed to:

a) supply to us your personal and contact information;

b) specify the type and quantity of X-Cart software products you want to use;

c) provide to us a License URL – a valid URL where the software will be run;

d) confirm your acceptance of the terms and conditions of X-Cart Software License Agreement.

As soon as the necessary information is submitted to us, our company will issue a license to you that will allow you to use X-Cart shopping cart software in a manner provided by the terms and conditions of X-Cart Software License Agreement. An online version of X-Cart Software License Agreement is available here: http://www.x-cart.com/software_license_agreement.html

License URL

To install an X-Cart-based online store, you need to have a domain name (your 'address' on the Internet, what people will type into their browser to find you).

Tip: If you do not have a domain name, you can obtain one from a web hosting provider: most web hosting providers offer domain name registration services. Here is a list of web hosting providers 100% compatible with X-Cart systems: http://www.x-cart.com/webhosting_companies.html

While purchasing X-Cart shopping cart software, you are supposed to specify the domain name that will be used for your online store as your License URL.

For example, if your domain name is example.com, and you are going to install your X-Cart-based store at the URL address http://example.com, you can specify either example.com (your domain name) or http://example.com (the exact URL of your store) as your License URL.

Please note that any one license allows you to have no more than one live online store at any given moment. That is to say, you cannot have two separate online stores running on the same license, no matter whether they are installed at the same domain or at different domains.

For example, if you have one license in which example.com is designated as your License URL, you cannot have stores at http://example.com and at http://example.com/mystore simultaneously.

Tip: Even with one license you can use different web locations to sell things over the Internet: 1) Organize redirection

of visitors to your store site from other websites or 2) Install your store at multiple URL addresses in such a way that all of the resulting websites will use the same database (in other words, will operate on the same product set and have the same set of customers and orders).

Keeping your license info up-to-date

It is your obligation to inform us about any changes in your license data so we can keep our records up-to-date.

For example, if you wish to transfer (sell) your license to a third party or move your X-Cart-based store to a different URL, you must inform our company about that, so we can update the license. Usage of the software outside the domain specified in your License URL violates X-Cart Software License Agreement and can be prosecuted.

You can view your current license information at any time via your personal member account.

Development copy

You are allowed to install one additional copy of X-Cart shopping cart software on a local computer for development purposes. By development we mean any activity aimed at preparing the software for commercial use at the URL for which appropriate license has been previously obtained. The development copy must not be made publicly available: any copy of the software appearing on the Internet is subject to licensing.

License verification

If necessary, you can check the validity of an X-Cart license at the following URL:
http://www.x-cart.com/verify_license.html.

Part

2

2   Installation and Configuration

2.1   System Requirements

X-Cart system installs/runs on:

Linux   Windows   FreeBSD   RedHat   SOLARIS   Cobalt   Mac OS X
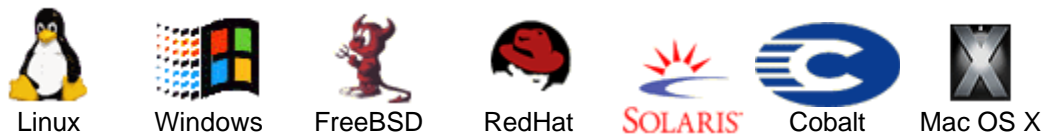
Minimal system requirements

▪ **PHP 4.0.6 or later (PHP 5 is also supported)**.

   Make sure the configuration file php.ini meets the following requirements:

   safe_mode must be disabled.

   file_uploads must be enabled.

   [PHP 5] register_long_arrays must be enabled.

   Tip: For help on PHP configuration settings, visit http://www.php.net.

▪ The web server must have support for **MySQL databases**.

   X-Cart is compatible with MySQL versions from 3.23 (MySQL v. 5.x is not supported).

   You will need to have access to a MySQL database, so make sure you have the following

      information:

      - your MySQL server name,

      - your database name,

      - your username and password.

   The amount of space required for X-Cart database depends on the number of products,
   customers and orders that will be stored there. Accordingly, database space requirements may
   vary from as little as 1 megabyte for small shops to over 100 megabytes for large stores.

▪ **Sufficient disk space** for X-Cart to run on. After the installation, X-Cart 4.0.17 uses about 16
   megabytes of disk space. In addition to that, some disk space will be needed for X-Cart's cache
   data, image files (if you choose to store them on the file system) and files that might be added
   in connection with X-Cart customizations.

Advanced requirements and recommended settings

Some areas of X-Cart's functionality rely on external executable files/modules. Accordingly, your
web server must be allowed to run external executable files (like Perl) and to make outgoing

connections to the Internet (that is required for online payments).

The following components may be required:

- An **HTTPS module** (like **Net::SSLeay perl module**, **CURL executable**, **OpenSSL executable** or **libCURL PHP extension**) for some of the online credit card processing modules and for shipping modules.

- **EXPAT extension for PHP** for Intershipper, UPS or USPS shipping modules.

> **Important**: If you are planning to use a Windows hosting, please make sure that X-Cart gets installed at a location from which it can freely access any external executable files which it might need for its work:
>
>   1) the full path to X-Cart installation directory must not include any space symbols;
>
>   2) the filepaths to the external executable files must not include any space symbols.
>
> Examples of *bad* paths:
>
>   C:\My Websites\xcart
>
>   C:\Program Files\Perl\bin\perl.exe

Make sure the functions "**exec**", "**popen**", "**pclose**" and "**ini_set**" are not included in the disabled functions list in php.ini:

- PHP function "exec()" must be allowed for the correct functioning of most of the CC payment processing modules used with X-Cart (CyberCash, CyberPac (LaCaixa), VeriSign PayFlow Pro, DataTrans, PayBox, CyberSource, PaySystems Client, VaultX), HTTPS modules (Net::SSLeay, CURL, OpenSSL, https_cli), GnuPG/PGP, X-Carts Patch/Upgrade functionality.

- PHP functions "popen()" & "pclose()" must be allowed for the correct functioning of some HTTPS modules (CURL, Net::SSLeay), payment modules (Saferpay, CyberSource, iDeb), shipping modules (DHL/Airborne, Canada Post, UPS Online Tools, Intershipper, AntiFraud module.

- PHP function "ini_set()" is used for the session mechanism and enhances security.

An **SSL certificate** is highly recommended to ensure security of online transactions at your store.

> **Tip**: Please refer to the page http://www.x-cart.com/ssl_certificates.html for a list of recommended SSL certificates.

2.2   Installing X-Cart

You can install X-Cart shopping cart software:

- using X-Cart Installation Wizard, or
- manually (for advanced users)

The procedure is different for UNIX and Windows based web servers:

## Installing X-cart using the Installation Wizard:

1. Ensure that your server meets the minimum requirements.
2. Do one of the following:

   • *If your server is Windows-based, or you have a UNIX-based server without the terminal access:* Unpack X-Cart distribution on your local computer using WinZIP or any other TAR-compatible archiver, then use your FTP client to upload the resulting files to a server directory which you will be able to access from the Web.

   • *If your server is UNIX based with terminal access*: Use your FTP client to upload X-Cart distribution to a server directory which you will be able to access from the Web, then uncompress the distribution using the following command:
   ```
   gunzip < x-cart-X.X.tgz | tar -xvf -
   or
   ```
   tar -xzvf x-cart-X.X.tgz

   For example, the web-accessible directory may be called 'httpdocs'. If the URL corresponding to the server location /home/example.com/httpdocs/ is http://www.example.com/, and if X-Cart files are inside the folder 'xcart', you will be able to access the installation script needed at step 4 of the installation process at the URL http://www.example.com/xcart/install.php

3. Do one of the following:

   • *If your server is Windows-based*: Skip this step and go to step 4.

   • *If your server is UNIX-based*: Go to the X-Cart directory on the server and change the file access permissions (see `man chmod` for more information):

     > cd xcart

     > chmod 777 .

     > chmod 666 config.php

     > chmod 755 admin/spam.sh

     > chmod 755 payment/*.pl

4. Open X-Cart Installation Wizard at the URL **http://***www.example.com*/*xcart*/**install.php** page in your web browser. Then follow the Installation Wizard instructions.
5. Please read our Software License Agreement, select the **I accept the License Agreement** checkbox and click on **Next** to continue with the installation.

   Picture 1. Installation wizard: license agreement.
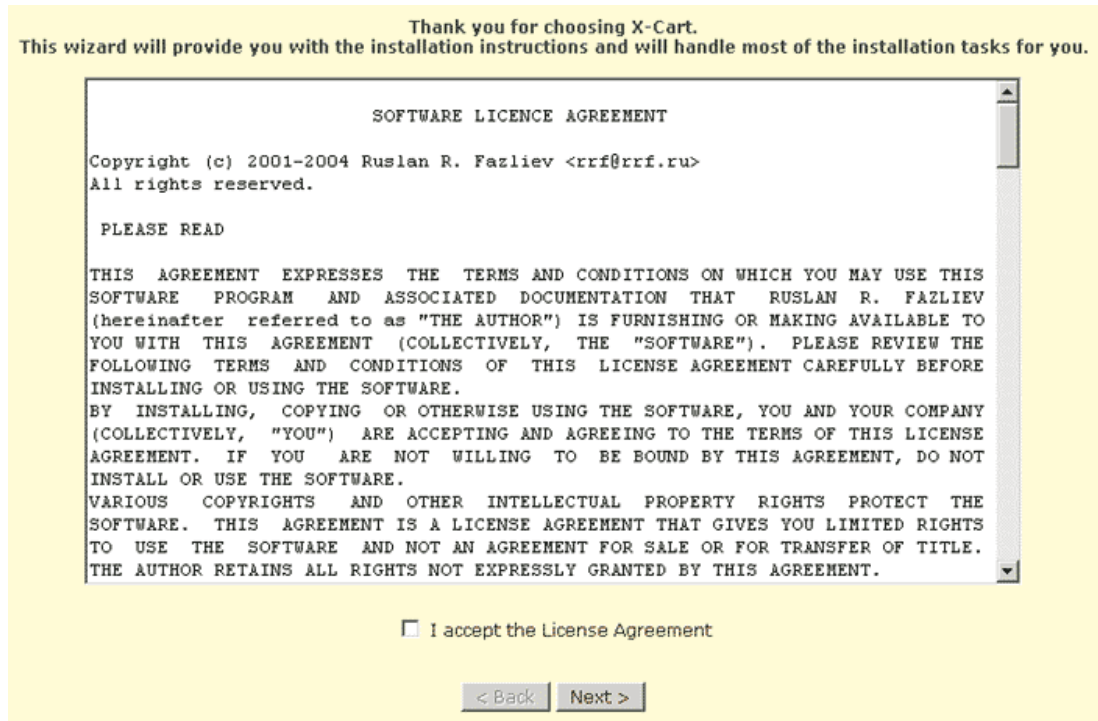
6. Setup will check PHP configuration on your server.

Picture 2: *Installation wizard: checking PHP configuration.*
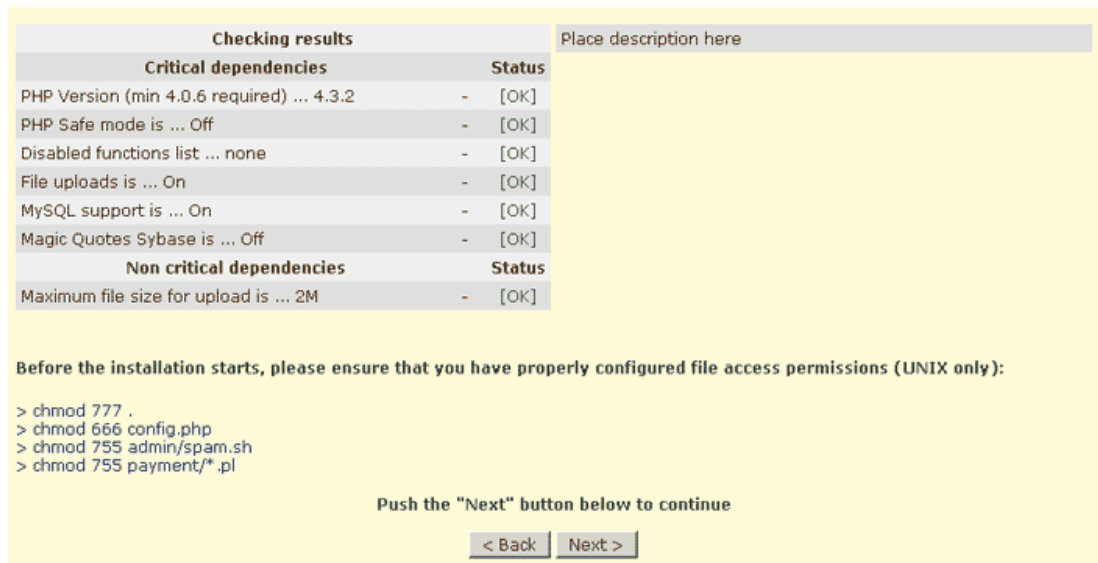
If everything is OK click on **Next**.

If something FAILED contact your server administrator and inform him about the problem.

Note. If some of the critical dependencies FAILED you will not be able to continue the installation until the problem is resolved.

7. Next, the Installation Wizard will need to know your web server details and MySQL database

information).

Picture 3: Installation wizard: preparing to install X-Cart database (request for web server details and MySQL database information).

The Installation Wizard needs to know your web server details and MySQL database information:	
Server host name Host name of your server (e.g. www.mywebstore.com)	www.example.com
Secure server host name Host name of your secure (HTTPS) server (e.g. secure.mywebstore.com)	www.example.com
X-Cart web directory Web directory where X-Cart files are located (e.g. /xcart)	/xcart
MySQL host name Host name of MySQL server. It can be host name or IP address	localhost
MySQL user name The name of the MySQL user	
MySQL database name The name of the database you connect to	xcart
MySQL password Which password to use for MySQL	
Your e-mail address This address will be used as default for company options	

Push the "Next" button below to continue

< Back   Next >

In the appropriate fields enter the following information:

- **Server host name**. For example, *www.your-store.com.*

- **Secure server host name**. The host name of your secure (HTTPS) server. If at the moment you do not have an HTTPS server, temporarily set this field value to your HTTP server name. Later you will be able to change it by editing $xcart_https_host in your config.php file.

- **X-Cart web directory** (as a rule, the wizard detects the directory automatically, but if it is not correct, enter the appropriate directory).

- **MySQL host name**.

- **MySQL user name**.

- **MySQL database name**.

- **MySQL password**.

Note. Usually the MySQL host name is *localhost* but you should get a MySQL host name, a user name, a database name and a password from your ISP.

Click on **Next**.

8. Verify if all the provided information is correct.

Picture 4: Installation wizard: preparing to install X-Cart database (verifiyng web server details and MySQL database information).

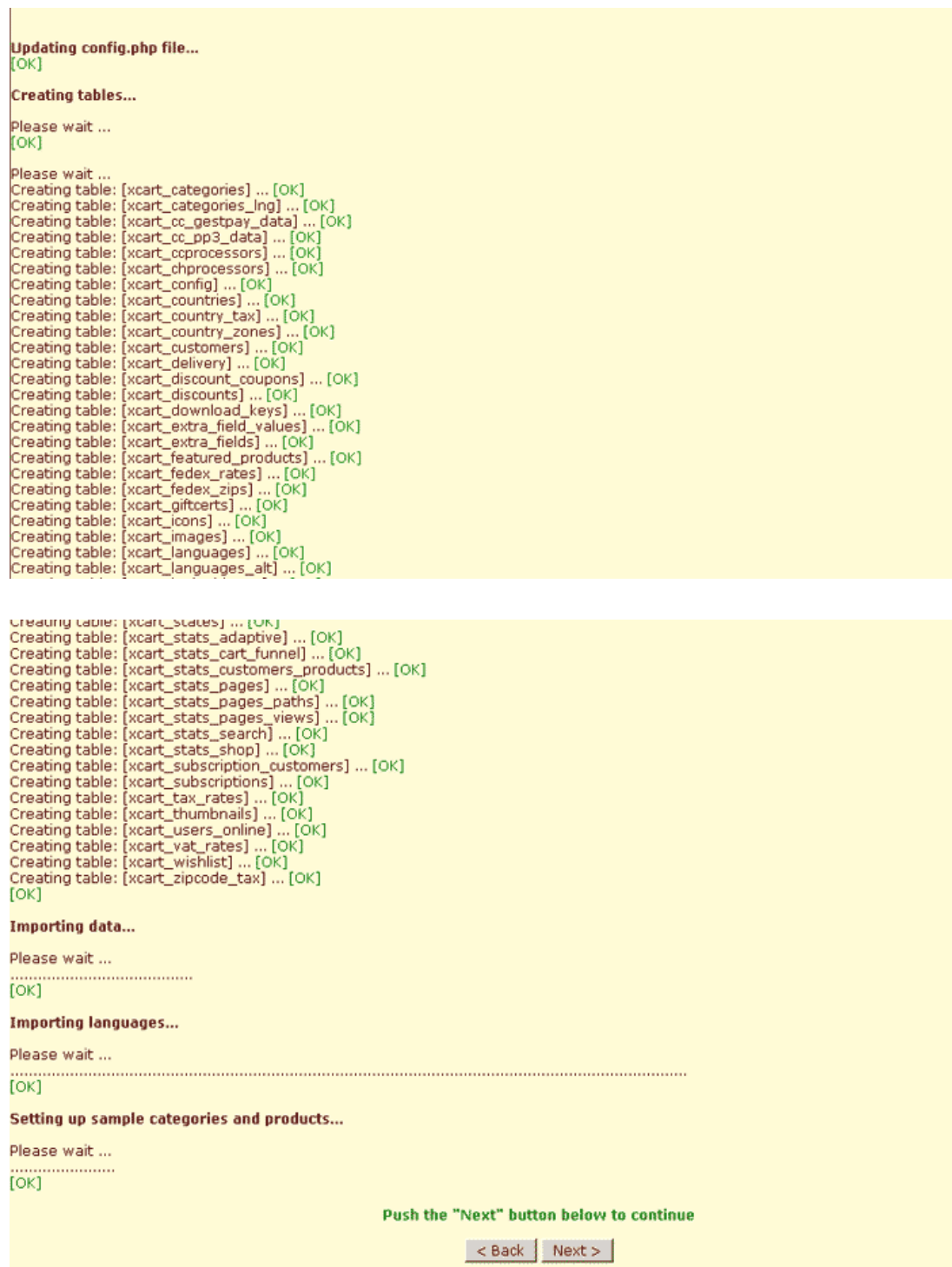|	
Server host name Host name of your server (e.g. www.mywebstore.com)	www.example.com
Secure server host name Host name of your secure (HTTPS) server (e.g. secure.mywebstore.com)	www.example.com
X-Cart web directory Web directory where X-Cart files are located (e.g. /xcart)	/xcart
MySQL host name Host name of MySQL server. It can be host name or IP address	localhost
MySQL user name The name of the MySQL user	xcart
MySQL database name The name of the database you connect to	xcart
MySQL password Which password to use for MySQL	xcart
Your e-mail address This address will be used as default for company options	your_email@domain.com
Languages Languages you want to install (use Ctrl key to select multiple options)	English
States table States of the country where the shop is located (use Ctrl key to select multiple options)	Australia Canada Spain United Kingdom USA
Sample categories/products Would you like to setup sample categories and products?	Yes
Update config.php only Tick this if you want to skip database importing (it should be empty if you make a full installation)	☐

< Back   Next >

Choose:

- **Languages** you want to install (Press and hold *Ctrl* to select more than one language)

- **States table** to import the list of states of the country where your store is located: USA, Canada, United Kingdom, USA & Canada, USA & Canada & United Kingdom or No states (Press and hold *Ctrl* to select more than one country)

- **Sample categories/products**: select *Yes* if you want to import sample categories/ products.

- **Update config.php only**: select this check box to skip database importing.

9. Click on **Next**.

Wait till the installation script creates the necessary folders, database tables and inserts data into the tables. The time necessary for this step depends on the speed of your server, but it should not be longer than 5 minutes. When this installation step is finished, you will receive the confirmation message and will be prompted to click on **Next** to continue.

Picture 5: *Installation wizard: beginning installation.*

Updating config.php file...
[OK]

Creating tables...

Please wait ...
[OK]

Please wait ...
Creating table: [xcart_categories] ... [OK]
Creating table: [xcart_categories_lng] ... [OK]
Creating table: [xcart_cc_gestpay_data] ... [OK]
Creating table: [xcart_cc_pp3_data] ... [OK]
Creating table: [xcart_ccprocessors] ... [OK]
Creating table: [xcart_chprocessors] ... [OK]
Creating table: [xcart_config] ... [OK]
Creating table: [xcart_countries] ... [OK]
Creating table: [xcart_country_tax] ... [OK]
Creating table: [xcart_country_zones] ... [OK]
Creating table: [xcart_customers] ... [OK]
Creating table: [xcart_delivery] ... [OK]
Creating table: [xcart_discount_coupons] ... [OK]
Creating table: [xcart_discounts] ... [OK]
Creating table: [xcart_download_keys] ... [OK]
Creating table: [xcart_extra_field_values] ... [OK]
Creating table: [xcart_extra_fields] ... [OK]
Creating table: [xcart_featured_products] ... [OK]
Creating table: [xcart_fedex_rates] ... [OK]
Creating table: [xcart_fedex_zips] ... [OK]
Creating table: [xcart_giftcerts] ... [OK]
Creating table: [xcart_icons] ... [OK]
Creating table: [xcart_images] ... [OK]
Creating table: [xcart_languages] ... [OK]
Creating table: [xcart_languages_alt] ... [OK]

Creating table: [xcart_states] ... [OK]
Creating table: [xcart_stats_adaptive] ... [OK]
Creating table: [xcart_stats_cart_funnel] ... [OK]
Creating table: [xcart_stats_customers_products] ... [OK]
Creating table: [xcart_stats_pages] ... [OK]
Creating table: [xcart_stats_pages_paths] ... [OK]
Creating table: [xcart_stats_pages_views] ... [OK]
Creating table: [xcart_stats_search] ... [OK]
Creating table: [xcart_stats_shop] ... [OK]
Creating table: [xcart_subscription_customers] ... [OK]
Creating table: [xcart_subscriptions] ... [OK]
Creating table: [xcart_tax_rates] ... [OK]
Creating table: [xcart_thumbnails] ... [OK]
Creating table: [xcart_users_online] ... [OK]
Creating table: [xcart_vat_rates] ... [OK]
Creating table: [xcart_wishlist] ... [OK]
Creating table: [xcart_zipcode_tax] ... [OK]
[OK]

Importing data...

Please wait ...
....
[OK]

Importing languages...

Please wait ...
....
[OK]

Setting up sample categories and products...

Please wait ...
....
[OK]

Push the "Next" button below to continue

< Back | Next >

10.Select layout, color scheme and dingbats. Click on **Next**.

Picture 6: Installation wizard: selecting layout, color scheme and dingbats.

Select color/layout:

Layout Select shop layout	3-columns (default) ▾
Color scheme Select color scheme	orange (default) ▾
Dingbats Select dingbats set	default ▾

Color scheme	Recommended dingbat sets
orange (default)	default, colortrans, redemboss, blackback, color
blue	colortrans, blackback, color, blue!
green	colortrans, greenround!, blackback, color
grey	default, colortrans, redemboss, blackback, color
red	colortrans, redemboss, blackback, color
yellow	default, colortrans, greenround, redemboss, color, blue

Push the "Next" button below to begin the installation

< Back   Next >

Picture 7: *X-Cart layouts.*
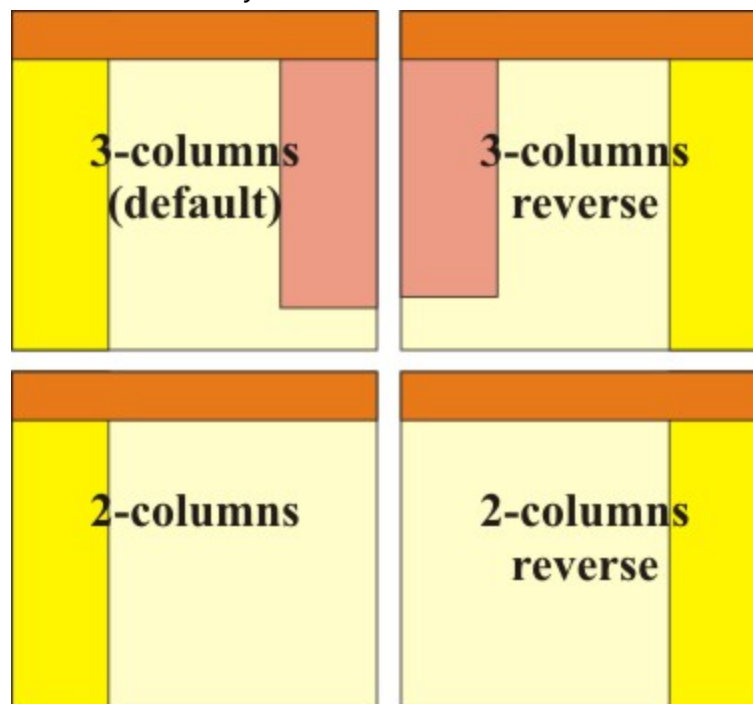
11. The installation will continue. You will be allowed to preview the chosen color/layout style.

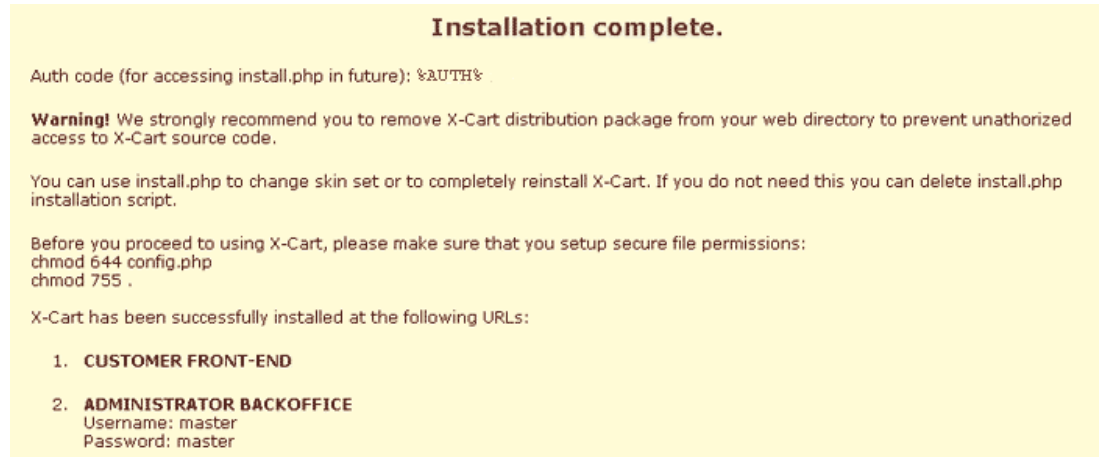***Picture 8:*** *Installation wizard: continuing installation, color/layout preview.*

If you are satisfied with what you see, click on **Next**.

12.You will be notified if the installation was successful.

Note. At this final stage of X-Cart installation you receive the so-called Auth

(authentication) code. It is a special key code that is used to prevent unauthorized access to X-Cart's installation script install.php. If, in the future, you decide to completely re-install X-Cart, change your store's skin set or install some X-Cart add-ons, you will be required to enter this code at the time of installation. Please be aware that, after X-Cart is installed, this code is stored for you in include/install.php. You can also look it up in the 'Summary' section of your store's Admin zone.

Picture 9: Installation wizard: installation complete.

Installation complete.

Auth code (for accessing install.php in future): %AUTH%

Warning! We strongly recommend you to remove X-Cart distribution package from your web directory to prevent unauthorized access to X-Cart source code.

You can use install.php to change skin set or to completely reinstall X-Cart. If you do not need this you can delete install.php installation script.

Before you proceed to using X-Cart, please make sure that you setup secure file permissions:
chmod 644 config.php
chmod 755 .

X-Cart has been successfully installed at the following URLs:

1. **CUSTOMER FRONT-END**

2. **ADMINISTRATOR BACKOFFICE**
    Username: master
    Password: master

You can use the links on this final page to access the different zones of your newly installed store.

13. Do one of the following:

- If you are not going to change the selected layout in the future, you can delete install.php file from the server. Use your FTP client, or issue `rm install.php` shell command from the terminal to remove the **install.php** file.

- If you need to keep `install.php`, modify it by setting the `$installation_auth_code` variable. This will prevent unauthorized access.

14. If your server is UNIX based, change the file permissions for the config.php file. Issue the following command: `chmod 644 config.php`.

Installing X-Cart Manually:

This section assumes that your server is UNIX-based, you have terminal access to it and possess basic UNIX knowledge. (It is not necessary to install X-Cart manually. Installation wizard will allow you to access all options and it is recommended to use Install.php script).

1. Ensure that your server meets the minimum requirements.

2. Upload the X-Cart distribution to your server by using your FTP client, put it where you want inside your web tree, then uncompress it using the following command:

```
gunzip < x-cart-X.X.tgz | tar -xvf -
```

or

tar -xzvf x-cart-X.X.tgz

3. Edit the X-Cart main configuration file, "config.php". X-Cart distribution includes a sample "

config.php", which you can modify. You can use "vi" text editor, or any other text editor you like. You will need to edit the following entries:

```
$sql_host ="%SQL_HOST%";

$sql_user ="%SQL_USER%";

$sql_db ="%SQL_DB%";

$sql_password ="%SQL_PASSWORD%";

$xcart_http_host ="%HTTP_HOST%";

$xcart_https_host ="%HTTPS_HOST%";

$xcart_web_dir ="%WEB_DIR%";
```

These entries represent the MySQL server name, the MySQL user name, the MySQL database name, the MySQL password, the server host name, the secure server host name and the installation directory.

4. Setup the proper permissions for files and directories, issue the following shell commands:

```
> cd xcart

> cp -R .pgp.def .pgp   # If you are planning to use the PGP encryption

> mkdir templates_c

> mkdir files

> mkdir catalog

> mkdir log

> cp -Rp skin1_original skin1

> chmod 777 templates_c

> chmod 777 files

> chmod 777 catalog

> chmod 777 log

> chmod -R 777 skin1

> chmod 755 admin/newsletter.sh

> chmod 755 payment/*.pl
```

5. Setup X-Cart database. If the database already contains tables with names used by X-Cart, these tables will be dropped and created anew, with new data inserted. Issue the following shell commands:

```
> cd xcart

> mysql -u <username> -p<password> <database_name> < sql/dbclear.
sql

> mysql -u <username> -p<password> <database_name> < sql/
xcart_tables.sql

> mysql -u <username> -p<password> <database_name> < sql/
xcart_data.sql
```

if you need demo store uploaded into database issue this command via shell or command line:

```
> mysql -u <username> -p<password> <database_name> < sql/
xcart_demo.sql
> mysql -u <username> -p<password> <database_name> < sql/states_<
Country>.sql
```

where <Country> can take these values:

CA

US

UK

I've installed X-Cart. What's next?

In X-Cart version 4.0 customer zone scripts are moved to X-Cart root, so the customer interface of your store can be accessed at: **http**://www.example.com/xcart/

There are some default user accounts in your copy of the X-Cart system. Please change the username/password information for these accounts right after the installation.

a. Administrator account (valid in X-Cart Pro version only):

    Usertype: Administrator

    Username: admin

    Password: admin

    Interface URL: **http**://www.example.com/xcart/**admin**/

b. Provider account (valid in X-Cart Pro version only):

    Usertype: provider

    Username: provider

    Password: provider

    Interface URL: **http**://www.example.com/xcart/**provider**/

c. Provider account (valid in X-Cart Gold version only):

    Usertype: Provider

    Username: master

    Password: master

    Interface URL: **http**://www.example.com/xcart/**provider**/

d. 'Root' provider account (valid in X-Cart Pro version only):

    Usertype: Provider

    Username: root

    Password: root

    Interface URL: **http**://www.example.com/xcart/**provider**/

Note. If you find it difficult to install X-Cart by yourself, you can purchase Installation services from us. Our qualified specialists will be glad to help you to install X-Cart on your web-server.

2.3   Configuration files

Configuring your store and adjusting the store settings is done mainly through the administration back-end. However, some low-level store settings should be stored in the configuration files. We strongly recommend you refrain from changing the configuration files, where possible. However, sometimes (in very rare cases) you will have to turn to the configuration files, for example if the MySQL server information changes.

X-Cart shopping cart uses the following configuration files:

- **/config.php**
- **/skin1/skin1.conf**
- /**top.inc.php**

config.php configuration file

This file is the main configuration file that controls the system behavior of X-Cart. In most cases, you do not need to edit this file manually, X-Cart Installation Wizard configures most of its variables automatically. In this file you will find the global definitions and common functions.

> **Warning**: It is highly recommended to make a backup copy of config.php file before you change anything.

SQL Details:

- `$sql_host` - DNS name or IP of your MySQL server.
- `$sql_user` - MySQL user name.
- `$sql_db` - MySQL database name.
- `$sql_password` – MySQL password.

HTTP & HTTPS host and the web directory where X-Cart is installed

- `$xcart_http_host` - Your host name without http:// prefixes.
- `$xcart_https_host` - Your secure host name without https:// prefix, set this field to the same value as `$xcart_http_host` if unsure.
- `$xcart_web_dir` (default = `"/xcart"`) - Web dir is the directory in the URL, not the file system path. Web dir must start with slash and have no slash at the end, the only exception is when you configure for the root of the site, in this case you should write single slash in it.

Store Credit Cards

- `$store_cc` (default = `false`) If set to `true`, X-Cart will store Credit Card numbers in the database. If you want to use Subscription module, set it to true.

- `$store_ch` (default = `false`) If set to `true`, X-Cart will store Check information in the database.

- `$store_cvv2` (default = `false`) If set to `true`, X-Cart will store CVV2 in the database. Please note: VISA International does not recommend to store CVV2 code with CC n umbers

Default images

You can use X-Cart standard images located in your X-Cart install directory or you can upload your own pictures.

- `$default_image` (default = "default_image.gif")

- `$default_icon` (default = "default_icon.gif")
  The default icon is 1x1 px transparent gif picture that cannot be seen by the human eye.

- `$default_banner` (default = "default_banner.gif")

- `$default_pcicon` (default = "prodconf.gif")

- `$shop_closed_file` (default = "shop_closed.html")

Single Store mode (PRO package only)

- `$single_mode` (default = false) - If you own a Gold package, this value should always be equal to "true". If `$single_mode` is set to true the store has shipping rates, discounts, taxes and discount coupons shared between all product providers. All product providers can edit each other's products. If `$single_mode` is set to false, each provider has his own rates and taxes which are applied to his products only. If you own GOLD edition of X-Cart shopping cart, setting this variable to false will not switch your GOLD shop into PRO.

FedEx Rates Directory

- `$fedex_default_rates_dir (default = $xcart_dir."/shipping/FedEx/")`

Directory where logs are stored

- `$log_dir (default = "/log")`

Other (advanced) options

Please mind these lines in the config.php file:

```
#
#
# DO NOT CHANGE ANYTHING BELOW THIS LINE UNLESS
# YOU REALLY KNOW WHAT ARE YOU DOING
#
#
```

In config.php you will find a lot of global definitions and general functions which can be changed. The config.php file is self-documented. Always read comments carefully. First, you will find a comment, and then the PHP code, for example:

```
#
# Store sessions data in database
#
$store_sessions_in_mysql = true;
```

SALT & CODE for user password & credit card encryption

The following two lines of code allow you to set up a key for the default (SALT) encryption method used for encrypting user passwords and order details:

- `$CRYPT_SALT = 85; # any number ranging 1-255`

- `$START_CHAR_CODE = 100; # 'd' letter`

To change the key, change the numbers. For `$CRYPT_SALT` any number from the range of 1-225 can be used. `$START_CHAR_CODE` uses ASCII character codes for letters, you can use any number ranging 65-90 or 97-122.

Blowfish key for Authorize.Net data

According to the terms and conditions set forth by Authorize.Net, the data used for payment transactions via Authorize.Net (namely, Login ID and Transaction ID) must be encrypted while being stored in the database. X-Cart uses Blowfish for the encryption of this data. The following line allows you to change the Authorize.Net Blowfish key:

- `$authorizenet_bfkey = "8d5db63ada15e11643a0b1c3477c2c5c";`

If you change the the Authorize.Net Blowfish key after you have already entered your Login and

Transaction key into the Authorize.Net settings form (Admin interface -> Payment methods -> Authorize.Net AIM -> Configure), please be prepared to enter the Login and Transaction key into that form again, as the original data gets lost with the change of the Authorize.Net Blowfish key.

Note. You do not need PHP programming knowledge at all to be able to run your store.

However, if you want to understand and change config.php and other PHP files and extend your shop with new features, you need some knowledge in PHP programming.

If you need additional, nonstandard features for your shop, we can offer you our services.

/skin1/skin1.conf configuration file

This is the configuration file for X-Cart templates engine. All variables from this file are available in templates. Refer to them as {#VariableName#} in the template files.

- CSSFile (default = "skin1.css") is a variable that contains the name for CSS file for the skin (relative to SkinDir). You can change it and use a different CSS file.

Note. In X-Cart versions older than 3.2.0 there were a lot of variables in the file skin1.conf, now you do not need to edit configuration files. The Admin can access and set these variables using back-end administration General settings ->General options

top.inc.php configuration file

Directories structure definitions

On certain operating systems __FILE__ constant may be defined in a wrong way (For example, on SunOS, __FILE__ constant for included files contains a relative path instead of absolute. Because of this, $xcart_dir, which defines the path to the directory where X-Cart is installed, is also defined wrongly and equals /).

If this causes problems on your system (you get "cannot include file"-type error messages), you can change the value of $xcart_dir manually in the 'Real path to the directory where X-Cart is installed' section of top.inc.php file:

```
------------------------------------------------------------------------------------------------------------------
---------

# Real path to the directory where X-Cart is installed

# If you have problems with __FILE__ constant definition on your server

# you can specify path directly. For example:

# $xcart_dir = '/home/user/public_html/xcart';

#

$xcart_dir = realpath(dirname(__FILE__));

------------------------------------------------------------------------------------------------------------------
```

Besides defining the location of the directory where X-Cart is installed, you may need to define the location of directories within X-Cart. It can be done in the 'Directories location definition' section of top.inc.php file:


```
# Directories location definition
# Examples:
# Customer's scripts are placed into the X-Cart subdirectory:
#       define ('DIR_CUSTOMER', '/<name_of_directory>');
#       define ('DIR_CUSTOMER', '/customer');
#       define ('DIR_ADMIN', '/admin');
#       define ('DIR_ADMIN', '/service_area/administration');
#
# (!) Customer's scripts are placed into the root X-Cart directory:
#       define ('DIR_CUSTOMER', '');
#
define ('DIR_CUSTOMER', '');
define ('DIR_ADMIN', '/admin');
define ('DIR_PROVIDER', '/provider');
define ('DIR_PARTNER', '/partner');
#
# Note: DIR_PARTNER is valid only for installed X-Affiliate module
#
```


By default Customer zone scripts are located in X-Cart root directory:

define ('DIR_CUSTOMER', '');

and the scripts of the Admin and Provider zones – in the '/admin' and '/partner' directories respectively:

define ('DIR_ADMIN', '/admin');

define ('DIR_PROVIDER', '/provider');

To change the location of php-scripts used in the Customer, Admin and Provider zones of your store, you should edit the values of DIR_CUSTOMER, DIR_ADMIN and DIR_PROVIDER constants.

If you have X-Affiliate module and need to change the location of its Partner scripts, please edit the value of DIR_PARTNER constant.

Part

3

3   Understanding X-Cart Shop

3.1   X-Cart Gold and Pro

X-Cart shopping cart software is distributed in two editions: X-Cart GOLD and X-Cart PRO.

- **X-CART GOLD** package is designed for small and medium internet stores. It allows you to run a store with an unlimited number of categories and products.

- **X-CART PRO** package is designed for medium or large internet stores and online malls. The advantage of this package is that it allows you to have multiple product provider accounts. It means that your X-Cart online store may be shared by several people or companies to sell products, and each of them will have a separate provider account with its own products and environment. Nevertheless, your store remains whole and your customers may not even know about the different providers. If you are planning to use X-Cart for a big store, you should consider the PRO package, as administrating and servicing huge shops is much easier with the shop divided among several providers. This also allows you to have different login names for the different "departments" of your store.

  The PRO package includes a module called **Simple mode**. This module allows you to enable an operational mode in which the Admin and Provider interfaces of your store will be combined into one interface. You will no longer have separate admin and provider accounts: any existing admin accounts will be disabled, while all provider accounts will get administrator privileges. In fact, providers will continue having their own product sets, shipping and tax rates, discounts, etc; however, in addition to that, they will be able to control the store configuration and appearance.

3.2   X-Cart Account Types

For X-Cart GOLD there are three types of accounts: provider (with the functions of both admin and provider), customer and partner.

 X-Cart PRO provides four account types: administrator, provider, customer and partner. The store can have multiple product providers.

Note. In both GOLD and PRO partner account type is available only with X-Affiliate installed. If you would like to have X-Affiliate you can purchase it at www.x-cart.com.

Here are the descriptions of each account:

- **Customer**: Your customers create customer accounts. Customer accounts are used to store your customers' personal information, billing and shipping addresses, contact and membership information, user names and passwords. Your customers are not required to

sign in.

- **Admin (X-Cart PRO)**: Administrator account is used to watch over the whole store, control and configure it, manage user accounts (including customer, partner, provider and admin accounts). Administrator account user can add products on behalf of any provider, as well as delete/modify products of any provider for anti-abuse purposes. Mainly, you use this account for working with orders, manual credit card processing, etc. The exception is the administrator account called "fulfillment staff" account (a "fulfillment staff" administrator has access only to orders and statistics).

- **Provider (X-Cart PRO)**: Provider account is used to add, delete and modify products and other properties related to products. Every provider has his own set of products and cannot control the products of the other providers. This feature allows to create a mall where each product provider is able to sell his own products. Everything a provider does affects his own products only. The exception is the provider account called "root provider". "Root provider" is an account that can be used by the store admin to access the provider area of the store (in fact, the area in which he sees the products and settings of all the other providers as though the store were working in Single mode). Note that any modifications made by the root provider can make a mess of the other providers' settings and negatively affect the work of the store in general. So please DO NOT use the "root provider" account to modify anything in the provider area (specifically, do not click any 'Update' buttons to update products, taxes and shipping data!), use this account for supervision only.

- **Provider (X-Cart GOLD)**: In the GOLD version of X-Cart provider is not the same thing providers are in X-Cart PRO. He combines the functions of both the store admin (has full control over the store) and provider (can sell products). This account is used to configure the store, as well as to add, delete and modify products and other properties related to products.

- **Partner** (**X-Cart GOLD or PRO + X-Affiliate**): X-Affiliate enables you to start affiliate programs with other sites to attract more customers to your store. Your affiliate partners use the partner type of user account.

Related topics:

[Managing](#) [User Profiles](#)

Part 4

4 Ordering Products with X-Cart (Customer)

4.1 Shopping Cart

X-Cart shopping cart enables your customers to buy things. The location of the shopping cart on the page depends on the type of layout preset for your store at the time of installation.

The cart is very easy to use. Your customers can always see how many items they have in the shopping cart and the sum total of the order.

Picture 1: Integrated shopping cart
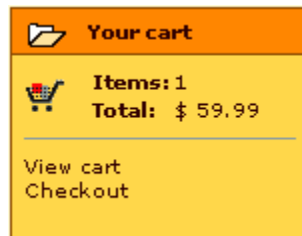
By clicking on the **View cart** link they can view the contents of the shopping cart. Clicking on **Checkout** initiates the checkout process.

Registered customers can start from the shopping cart area to modify and delete their profiles, view their orders history, add items to their wish list or create gift registries (Wishlist and GiftRegistry modules need to be enabled).

Picture 2: Integrated shopping cart (Registered customers view)
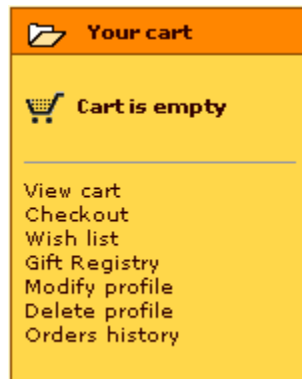
Operating the contents of a shopping cart

When a customer adds an item to the shopping cart or clicks on **View cart** in the shopping cart area - the 'Items' form appears. Here your customer can view the contents of his shopping cart and, if needed, modify the order.

Picture 3: *Shopping cart items form*

If the customer wants to order a quantity of some product different from the one initially specified in the shopping cart, he should enter the desired quantity in the appropriate field and click on **Update**. The cost of the products in the shopping cart will be recalculated automatically.

To remove an item from the shopping cart the customer should click on **Delete item** next to the item he wants to remove.

The customer can also edit options of the selected item if there are any. To do so he should click on **Edit options** next to the item. 'Edit options' page will be opened in a new window. After making changes the customer should click on **Update** to save the changes.

To remove all items from the cart he should click on **Clear cart**.

Saving customer's cart in the database

A customer's cart (with all the products in it) is kept in the database till the customer's next visit. The next time the customer logs in, he can easily find all the chosen products.

4.2   Checkout

As soon as the customer is satisfied with the contents of his shopping cart, he can begin the process of checkout. X-Cart checkout system includes 3 steps:

- **Step 1**: *Specifying customer personal and contact information, billing and shipping addresses.*
  Registered customers starting checkout while being logged in skip this step. Customers who did not log in usually start by choosing a delivery method, and then they are offered either to specify their personal information, billing/shipping addresses and contact information (like telephone number and email address) in the new member registration form, or to log in by entering their user name and password.

Picture 1: Profile details form

The fields marked by the red * (asterisk) sign are mandatory.

- **Step 2**: *Selecting delivery and payment methods.* If shipping cost calculation is enabled in your store, your customer can choose a method of delivery from the drop-down list, so the price of delivery is calculated depending on his shipping address and the chosen method.

Picture 2: *Choosing a shipping method*

As soon as the necessary method is selected from the drop-down list, the customer can click on **Checkout** to proceed.

Payment method section allows your customer to choose the desired payment method.

Picture 3: *Choosing a payment method*

The customer is supposed to select the appropriate radio button and click on **Continue**.

- **Step 3**: *Providing payment details.* At this stage the customer can check if his personal and contact information was entered correctly and is supposed to enter the required information for the selected payment method (for example, the credit card number and the expiration date).

Picture 4: *Providing payment details*

Payment details

```
Personal information:
--------------------
  First Name:    Jill
  Last Name:     Backer
  Phone:         (715)123-4567
  Fax:
  E-Mail:        jill_backer79@hotmail.com
  Web site:

Billing Address:
----------------
  First Name:    Jill
  Last Name:     Backer
  Address:       Test address
  City:          Test city
  State:         Wisconsin
  Country:       United States
  Zip code:      54821

Shipping Address:
-----------------
  First Name:    Jill
  Last Name:     Backer
  Address:       Test address
  City:          Test city
  State:         Wisconsin
  Country:       United States
  Zip code:      54821
```

Modify `Go`

Change payment method `Go`

Credit card information

Credit card type	Visa
Cardholder's name	Jill Backer
Credit card number (no spaces or dashes)	
Expiration date (MMYY)	
CVV2	

Notes

Customer notes:

Clicking "SUBMIT" you agree with our "Terms & Conditions" and "Privacy statement".

`Submit order`

If the customer's information is incorrect, he can go back to editing it by clicking on **Modify**. The payment method chosen at the previous step can be changed by clicking on **Change payment method**.

If the store is configured to use 3-D Secure Transaction Authentication and the customer opts to pay using a payment method that supports this security mechanism, he will see the following message below the Credit card information form:

Picture 5: *Secure transaction message*

After all the necessary fields are completed, the customer can click on **Submit order** button to place the order. If the transaction requires authentication, the customer will be requested to provide additional information prior to order completion.

Part

5

5 Managing Products and Orders (Provider)

5.1 Provider Quick Start

Note. If you are using **X-Cart GOLD** version, the provider acts both as a provider and an administrator, so please check Admin Quick Start section of this manual.

This section provides brief instructions on what a provider should do after X-Cart is installed and all the necessary settings are defined by the store administrator.

• Modify your profile. Change the default username/password that you used to log into the provider zone (Your profile menu ->Modify).

• Use the Summary section to control any problems that may need to be resolved.
See: Summary Page (Provider)

• Shipping charges and tax rates may vary depending on the location of your customers. X-Cart allows you to group the locations to which your store is going to sell products into a few 'destination zones' based on the common shipping charge and tax rates.
See: Defining Destination Zones

• Define shipping charges for each shipping method you are going to use and for each destination zone you defined.
See: Defining Shipping Charges

• If real-time calculated shipping methods are enabled in your store, you might wish to define shipping markups to cover the additional expenses you incur in connection with shipping your products by these methods (e.g. packing, insurance, etc). The markups you define will be added to the values returned by the real-time shipping calculation services.
See: Defining Shipping Markups

• Define taxes for different countries, states and zipcode areas.
See: Defining Tax Rates

• If necessary, add non-standard fields to provide more information about your products.
See: Adding Extra Fields to the Product Table

• Add products to your store by providing the necessary product details (product name, description, thumbnail image, price, weight, etc)
See: Adding New Products or Importing Products

• If needed, provide additional options for your products:

- international descriptions (if you want international customers to be able to read the product description in their native languages)

- product options (if you want your customers to be able to choose the size, colour and other options when ordering the product) or product variants

- product classifications (if you are going to use Product Configurator)

- subscription (if you want to enable your customers to purchase the product on a regular basis)

- wholesale price (if you want wholesale purchasers to have an advantage in ordering this product)

- upselling links (if you want to recommend some other products to the customers viewing this product)

- detailed images (if you want your customers to be able to see the product in detail)

- taxes (individual taxes applicable to this product in different destination zones)

- manufacturers (if you want to assign the product to a group of products produced by the same manufacturer and make it available through the manufacturers list)

See: Modifying Product Info

- If needed, define global discounts for your products.
  See: Defining Discount Rates

- If you want, you can define discount coupons.
  See: Defining Discount Coupons

This is about all that has to be done before you open the store. We did not mean this section to be anything more than a quick overview, so please read X-Cart shopping cart software reference manual for more information on products and orders management in X-Cart based online stores.

5.2   Products

5.2.1   Managing Product Manufacturers

Some customers may prefer to find products by the manufacturer. X-Cart shopping cart software allows you to create manufacturers and assign products to them. Products sorted by the manufacturers can be seen by your customers through the Manufacturers menu in the customer zone.

Both administrators and providers have the ability to create manufacturers and assign products to them.

Note. You can find information on assigning products to a manufacturer in the topic 'Defining the Product Manufacturer' in the 'Managing Products and Orders (Provider)' section.

Only administrators can activate manufacturers and set up their order in the manufacturers list. Thus, when a new manufacturer is created by a provider, the administrator needs to specify its position number and activate it. New manufacturers do not appear on the storefront until they are activated.

Adding manufacturers
1. Click on **Manufacturers** in the Management menu. The 'Manufacturers list' will appear.

2. Click on **Add new**. 'Manufacturer details' form will be opened.

Picture 2: Manufacturer details form.

3. Enter the title for the new manufacturer in the appropriate field.

4. Use **Browse** to locate the manufacturer's logo and select it for the manufacturer.

5. Enter the description.

6. Enter the URL of the manufacturer's site.

7. Enter the position number.

8. Select the 'Availability' check box to make the manufacturer active.

9. Click on **Save**.

You can use the **Add Manufacturer** link to add more manufacturers to the list.

Modifying the details of a manufacturer

1. Open the 'Manufacturers list'.
2. Click on the manufacturer you want to modify.
3. Change the necessary details.
4. Click on **Save**.

Administrators can modify any manufacturers in the store. Providers can modify only the manufacturers they created themselves.

Note. If products of more than one provider are assigned to a manufacturer, the provider who created this manufacturer will not be able to rename it.

Updating the manufacturers list

1. Open the 'Manufacturers list'.
2. If necessary, change the position number of one or more manufacturers.
3. Select the check boxes in the 'Active' column for the manufacturers you want to be displayed on the storefront. Unselect the check boxes for the manufacturers you want to be temporarily disabled.
4. Click on **Update**.

Deleting manufacturers

1. Open the 'Manufacturers list'.
2. Select the check boxes next to the manufacturers you want to delete.
3. Click on **Delete selected**.

Administrators can delete any manufacturers in the store. Providers can delete only the manufacturers they created themselves.

Note. If products of more than one provider are assigned to a manufacturer, the provider who created this manufacturer will not be able to delete it.

Related topics:

Advanced Product Management

5.2.2   Adding New Products

To add a product click on **Add new product** in the Product menu. 'Add Product' page will be opened. Use the 'Product details' form to enter the new product details.

Picture 1: Product details form.

Product details

Product thumbnail

Thumbnail
(recommended size
50x50-150x150)

No Image
Available

[Change image]   [Delete image]

Product owner

Provider: Mr. Provider Provider (provider)

Classification

Main category: Books

Additional categories:

Books
Books/Internet
Books/Software
CD - DVD - Video
CD - DVD - Video/CD audio
CD - DVD - Video/DVD
CD - DVD - Video/Video cassettes
Computer hardware

Availability: Available for sale

----
break--

1. Select an image for the product thumbnail:

   • Click on the **Change image** button, confirm your intention to change the image. The 'Image selection' window will appear.

   • You can use images located on the server, on your local computer, or on the Internet. Locate the image file you want to use for the thumbnail picture and click on **Apply.**

   Note. Recommended thumbnail image size is from 50x50 px to 150x150 px. For more information see: Working with Images.

2. Choose which categories the product should be displayed in. If you want the product to be assigned to just one category, the name of this category should appear in the 'Main category'

field. If you need the product to be displayed in more than one category, you can specify additional categories for it. Select the appropriate categories from the drop-down lists.

> **Note**. If there is not an appropriate product category see: Setting Up the Category Tree.

3. Choose the current status of your product from the drop-down list (*Available for sale*, *Hidden, Bundled* or *Disabled*)

The status *Available for sale* means that the product can be found by browsing the product catalog or by submitting a product search query and can be purchased by customers.

Hidden means that the product is not included into the catalog and cannot be found in any of the categories or via product search, but can be accessed directly if you know its URL. This feature enables you to sell the product only to the most privileged of your customers (If you select the availability status '*Hidden'*, the URL of the new product appears below the 'Availability' select box after you click on **Save**).

Bundled means that the product is sold only as a component of a configurable product and cannot be purchased separately.

Disabled means that the product is not displayed to customers and is not available for sale.

4. Enter the product SKU (you can use the value generated by X-Cart). Enter the product title, the short (for the Product Browsing View) and detailed (for the Product Detailed View) descriptions.
5. Enter the product price and list price, as desired. (Customers will be charged as you define in the 'Product price' field. List price is only used for advertising purposes.)
6. Enter the quantity of the product in stock. X-Cart shopping cart software has a built-in stock tracking system that enables you to track the number of products remaining in stock. Every time you sell a product item this number is lowered automatically.

> **Note**: The product will not be available for sale if its quantity in stock goes down to zero. The product will remain on the storefront with an "Out of stock" sign unless your admin chooses to disable products which are out of stock (General Settings>General options> Disable products which are out of stock). If you do not want to track items in stock, your admin can disable inventory tracking: General Settings>General options>Disable inventory tracking.

7. Enter the low limit in stock. If the number of items in stock reaches this limit, the orders department of your store will start getting e-mail notifications about the decreasing quantity of the product every time someone orders this product.
8. Enter the minimum order amount (the minimal number of items that your customers will be able to order at a time).

> **Note**. Please make sure that the minimum order amount does not contradict the value of the "Maximum number of selections in quantity selectbox" option in General settings> Appearance options (In other words, the minimum order amount defined for any product should not exceed the amount available for selection from a quantity selectbox).

9. Enter the weight of the product in weight units defined through General Settings>General options.
10. Specify if the product is tax exempt (choose *No* or *Yes* from the drop-down menu).
11. Select which taxes should be applied to this product (press and hold Ctrl while clicking your

mouse to select multiple taxes).

> **Note**. The taxes which can be applied to products in your store are defined by the store admin.

12. Specify if shipping for this product is free (choose *No* or *Yes* from the drop-down menu).
13. Enter the shipping freight, as desired. If you have any special expenses associated with product packaging or shipping you can define the shipping freight to cover these expenses.
14. Select the Apply global discounts check box if you want global discount rates to be applied to the product.
15. Click on **Save** in the lower part of the 'Product details' form to apply the changes. If you selected *Available for sale* from the 'Availability' drop-down box, the product will be published right away.

> **Note**. If necessary, you can make use of advanced product settings. Please refer to the ' Advanced Product Management' section of this manual for more information.

> **Note**. If you need to add a new product similar to some product that already exists in your store, consider using the 'clone' feature. Please refer to the 'Cloning products' section of this manual for more information.

Related topics:

Advanced Product Management

Searching for Products

Updating Products' Quantity and Price

Previewing Product Details

Modifying Product Details

Deleting Products

Cloning Products

Generating HTML Links to Products

5.2.3   Searching for Products

X-Cart provides a built-in search engine which can be used to search for a specific product or to list all the products in a certain category.

> **Note**. In X-Cart PRO edition providers can search and list only the products they control. The administrator, fulfillment staff and root provider can view all the products of the store.

Basic search

1. Click on **Search for products** in the Products menu, the 'Search for products' form appears.
    Picture 1: Basic search.

2. Specify the necessary search parameters:

- Select the category in which you want the search to be conducted.

- Specify if this category is main or additional for the product you are going to search for.

- If you want subcategories to be searched, select the 'also search in subcategories' check box.

- Enter your pattern into the 'Search for pattern' field. A pattern is a fragment of the product title, short description or detailed description by which the system will be able to identify the product.

- Specify where the system should search for this fragment by selecting 'Title', 'Short description' and/or 'Detailed description' check box(es).

- If you have any enabled extra fields, mark the check boxes next to the names of extra fields in which you think the pattern may be contained.

Note. If you want the system just to list all the products in the store, skip step 2.

3. Click on **Search.** Search results will be displayed in the 'Search results' form.

Note. If you are searching for a product / group of products in order to modify their details, you can use the 'Search-and-modify' option. Select this check box and all the products found by your search query will be displayed in a list from which you will be able to view and modify the product details by clicking on the product name links (The product details form appears below the list of found products).

Advanced search

'Advanced search options' section enables you to be more specific in setting the parameters for your search. To expand the 'Advanced search options' section, click on the "+" box or on the **Advanced search options** link.

Picture 2: Advanced search.

It is not necessary to fill out all the fields in the 'Advanced search options' section. Specify only the parameters relevant to your search. The more information you will provide about the product, the more accurate the search results will be. You can specify:

1. SKU
2. Product ID#
3. Price range
4. Quantity range
5. Weight range
6. Availability status (*Available for sale*, *Disabled*, *Bundled*)
7. Additional options (*Assigned* or *Not assigned*):

> • Free shipping
>
> • Global discounts
>
> • Minimum order amount
>
> • List price
>
> • Shipping freight
>
> • Tax exempt
>
> • Low limit in stock

After providing the necessary parameters, click on **Search**. All the products found by your search query will be listed in the 'Search results' form.

Search results

The 'Search results' form shows the product SKU, title, quantity and price for each of the found

products.

Picture 3: Search results.

Clicking on the product title or SKU links of a product enables you to view and modify the details of a product.

Quantity and Price can be updated right in the 'Search results' form: just enter the new values into the appropriate fields and click on **Update**.

You can delete products listed in the search results: select the check boxes of the products you want to delete, then click on **Delete selected**.

You can modify products listed in the search results: select the check boxes of the products you want to modify, then click on **Modify selected**.

You can use the **Check all** / **Uncheck all** links above the search results table to select or unselect all the products in the search results list.

The lower row of buttons (**Preview product**, **Clone product** and **Generate HTML links**) enables you to preview or clone a product and to generate HTML links. All these operations apply only to the first product if multiple products are selected.

Clicking the **Search again** link takes you back to the 'Search for products' form and enables you to start a new search.

Page navigation

Paging is provided for more convenient navigation in cases when the list of results delivered by the search engine is too long. The number of products per page and the maximum number of navigation pages can be defined through the Appearance options section of the admin zone (General Settings>Appearance Options>Products per page (admin) and General Settings> Appearance Options>Maximum navigation pages).

Related topics:

5.2.4   Updating Products' Quantity and Price

If you need to quickly update the quantity and price of one or more products, all you need to do is search for the product(s) and update their quantity and price directly in the 'Search results' form. Take the following steps:

1. Click on **Search for products** in the Products menu. X-Cart 'Product Management' section will be opened.
2. Use the provided 'Search for products' form to find the product you would like to update. The products found by your search query will be listed in the 'Search results' form.

Picture 1: Search results.

1. Enter the new quantity and/or price where necessary.
2. Click on **Update**.

Related topics:

5.2.5   Previewing Product Details

If you need to quickly find information about some product in your store, do the following:
1. Click on **Search for products** in the Products menu. X-Cart 'Product Management' section will be opened.
2. Use the provided 'Search for products' form to find the necessary product. The products found by your search query will be listed in the 'Search results' form.

Picture 1: Search results.

3. Select the check box next to the product you would like to preview. Click on **Preview product** in the lower part of the 'Search results' form. The product preview box will appear.

Picture 2: Product preview box.

You can modify, clone or delete the product using the **Modify**, **Clone** and **Delete** links in the lower part of the product preview box. Clicking on the printer icon opens the printable version of the product preview page.

Related topics:

Modifying Product Details

Cloning Products

Deleting Products

5.2.6   Advanced Product Management

5.2.6.1   Advanced Product Management

The basic steps that should be taken to create a new product and publish it on the storefront are described in the 'Adding New Products' section of this manual. However, you may want to modify product details or set advanced product settings for the products in your store. For example, you may want to add product descriptions in other languages, set up subscriptions to some products, add product options (color, size, etc), define different product price levels for different membership groups, add detailed images and so on. All this can be done in the 'Product Management' section. The menu items needed for editing product details and setting/editing the advanced product settings appear in the 'Product Management' section menu when you are working on an individual product (after a new product has just been created or after you have opened a product in the 'Product Management' section to modify its details).

***Picture 1:** 'Product Management' section menu for setting/editing advanced settings of an individual product.*

You can click on the menu items under the '**In this section**' header to edit the details of the product and set/modify advanced settings: international descriptions, product options and product variants, product classification (if you are going to use the product in Product Configurator), subscriptions, wholesale prices, up-selling inks, detailed images, customer reviews and product manufacturer.

The following topics provide detailed information on modifying product details and setting/editing advanced product settings:

Modifying Product Details

Adding and Removing International Descriptions

Adding and Removing Product Options

Managing Product Variants

Classifying the Product

Setting up a Subscription

5.2.6.2   Modifying Product Details

X-Cart allows you to modify products in two ways: you can either modify separate products one by one or simultaneously edit multiple products. When multiple products are edited simultaneously, you can make changes to just one product out of the group and apply them to all the rest of the products being edited.

To modify the details of a separate product:

1. Click on **Modify product** in the Products menu. X-Cart 'Product Management' section will be opened.
2. Use the provided 'Search for products' form to find the necessary product. The products found by your search query will be listed in the 'Search results' form.

Picture 1: *Search results.*

3. Click on the SKU or title link of the product you would like to modify. The 'Product details' form displaying the details of the selected product will appear.

Picture 2: *Product details form.*

Product details

Product thumbnail

Thumbnail
(recommended size
50x50-150x150)

[Change image]   [Delete image]

Product owner

Provider: Mr. Provider Provider (provider)

Classification

Main category: Electronics/Cellular phones/Accessories ▾

Additional categories:
```
Books
Books/Internet
Books/Software
CD - DVD - Video
CD - DVD - Video/CD audio
CD - DVD - Video/DVD
CD - DVD - Video/Video cassettes
Computer hardware
```

Availability: Available for sale ▾

4. Change the product details that need to be changed (You can refer to the topic Adding New Products for more information about the 'Product details' form).

5. Click on **Save**.

> **Note**. If a product has any defined advanced product settings, you may change them as well. You can use the 'Product Management' section menu to modify the advanced settings of the product(s) opened for product details modification.

To simultaneously modify the details of multiple products:

1. Click on **Modify product** in the Products menu. X-Cart 'Product Management' section will be opened.

2. Use the provided 'Search for products' form to find the necessary product. The products found by your search query will be listed in the 'Search results' form.

Picture 3: *Search results.*

3. Select the check boxes next to the products you would like to modify. Click on **Modify selected** in the lower part of the 'Search results' form. The products you selected for modification will be displayed in the 'Product list' box. Below the 'Product list' box there will be the 'Product details' form displaying the details of one of the selected products.

Picture 4: *Product list box and Product details form.*

4. Click on the SKU or title links in the 'Product list' box to view and modify separate products. If you want some changes to be applied to the whole group of products, edit just one product and select the check boxes corresponding to the fields that you want to become common for all the products in the group.

5. Click on **Save** to apply the changes.

Note. If a product has any defined advanced product settings, you may change them as well. You can use the 'Product Management' section menu to modify the advanced settings of the product(s) opened for product details modification.

Related topics:

[Advanced](#) [Product Management](#)

5.2.6.3   Adding and Removing International Descriptions

You can create international descriptions of products (descriptions in other languages). Descriptions in other languages help target your products for certain markets.

To add an International description:
1. Find the product for which the international description is intended. Open this product for modification in the 'Product Management' section.
2. Click the **International descriptions** link in the 'Product Management' section menu. The 'International descriptions' dialog box will be opened.
   Picture 2: International descriptions.

3. Use the drop-down box to select the language you want to use for the description.
4. Enter the product title, the description and the full description into the corresponding fields.
5. Click on **Apply**.
6. Repeat steps 3-6 to add descriptions in other languages.

To delete a description, click on **Delete** next to the description you want to delete.

Related topics:

Advanced Product Management

5.2.6.4   Adding and Removing Product Options

With X-Cart you can enable your customers to choose product options at the time of placing an order. Let us try to imagine what kinds of options a product vendor may need to be able to use. For the most part it depends on the nature of product being sold and on the quantity of all the variants of this product available for sale.

Suppose, you sell colored T-shirts. For a person who wants to purchase a T-shirt from you, two features would be of relevance: color and size. You know that your T-shirts are available in three colors (red, blue, brown) and four sizes (S, M, L, XL). You need to enable your customers to choose the right combination of these features (for example, a red T-shirt of size XL). X-Cart options mechanism offers you two solutions, depending on the quantity of T-shirts available for sale:
1. The quantity is unlimited. In this case it does not matter much, which combination of size and color a customer will choose - just let him choose any size and color. *Modificator* type

options will help you handle this situation: define 2 option classes ('Color' and 'Size') and the necessary number of available option variants within each of the classes (Red, Blue, Brown - within the class 'Color'; S, M, L, XL - within the class 'Size'). This type of options is called Modificator because it enables you to modify the price of your product by means of mark-ups and discounts depending on the option variants the customer selects (for example, you can enable your customers to buy red T-shirts for less - just define a flat or percent value by which the product price should be discounted if somebody chooses the option variant 'Red'). If some combination of option variants is unavailable (for example, blue T-shirts are not available in size XL), you can describe it in the form of exception, so your customers will not be able to choose this combination.

2. The quantity is limited. This makes you interested not so much in the number of T-shirts you have in stock, as in the number of products within each of the available variants of the product 'T-shirt'. A variant is a set of products with the same combination of options (in our example, all red T-shirts of size S make one variant, all red T-shirts of size XL make another variant, etc). As different product variants may have different weight and price, we believe, it is only natural that a product vendor would like to have an ability to somehow track the quantity of products within each product variant separately - and thus, to have a separate SKU for each of the variants. These ideas refer us to another type of options called *Variant*. If you choose this type, you will be able to create option classes and option variants as well as in Modificator, but you will have more flexibility in setting the product variants' price, weight and quantity in stock.

Both *Modificator* and *Variant* option types enable your customers to choose from a pre-defined list of option variants. However, X-Cart provides a third type - *Text field* - that enables customers to provide custom information about what exactly they want to get. For example, if a product is being purchased as a gift, your customer might want a card to be sent along with it - so you can provide a text field into which the customer would be able to enter a message for this card.

Product options of any type can be added as follows:
1. Find the product for which you would like to add options. Open this product for modification in the 'Product Management' section.
2. Click the **Product options** link in the 'Product Management' section menu. The 'Product options' and the 'Add/Update option' dialog boxes will appear.

Picture 1: 'Product options' and 'Add/Update option' dialog boxes (empty).
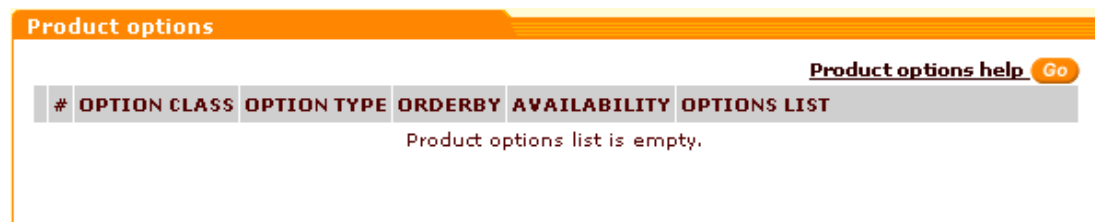
The 'Product options' box normally contains a list of all the options defined for the product being edited. If no options have been defined so far, the list is empty. You can add new options using the 'Add/Update option' dialog box.

Note. Clicking the **Product options help** link allows you to access quick help on product options.

3. Fill in the 'Add/Update option' dialog box fields:

   • Enter the title of the option class into the 'Option class' field.

   • Enter the description of the option that will be shown to your customer into the 'Option text' field.

   • Use the 'Option type' drop-down box to select the option type (*Modificator*, *Variant* or *Text field*).

   • If the product is going to have more than one option, you can define the order in which the options will be displayed to customers: enter the position number for the option into the 'OrderBy' field (the greater the position number is, the closer the product option will be to the end of the list).

   • Select the 'Availability' check box to make the option available to customers.

   • If you are creating a 'Modificator' or 'Variant' option, enter option values into the 'Option values list' field.
   For a 'Modificator' option the symbols "=", "+" or "-" and "%" can be used to describe how choosing this or that option affects the price of the product. For example, setting the options as is shown in the picture below, you can expect the product price to be discounted by 4% if a customer chooses the red color, and a $5 mark-up to be added to the price if he chooses blue.

Picture 2: 'Add/Update option' dialog box ('Modificator' option example).

For a 'Variant' option you only need to enter the names of your variants.

Picture 3: *'Add/Update option' dialog box ('Variant' option example).*

There can be no variants if you selected *Text field* in the 'Option type' field.

4. Click on **Add/Update options**. The new option will be added to the list of options in the 'Product options' dialog box. The created option class will be assigned a ClassID number (ClassID is generated automatically and appears in the **#** column of the 'Product options' table). 'Exceptions' and 'Validation script (Javascript)' boxes will appear below the 'Add/Update option' dialog box.

Picture 4: *'Product options' dialog box (New option has been added to the options list)*

5. If needed, adjust the option settings in the 'Add/Update option' box. Click on **Close**. Repeat steps 2-5 to add more options.
6. (If you created *Variant* type options) Click on **Product variants** in the 'Product Management' section menu and use the 'Product variants' form to set up the price, weight and quantity of the defined product variants. Please refer to the 'Managing Product Variants' section of this manual for more information on managing product variants.

You can change the order and availability of options: just change the values in the **ORDERBY** and **AVAILABILITY** columns in the 'Product options' dialog box and click on **Update**.

To delete a product option, select the check box next to this option in the 'Product options' dialog box and click on **Delete selected**.

To modify an option:
1. Click on the option name link in the 'Product options' dialog box.
2. Scroll down to the 'Add/Update option' dialog box. The contents of this dialog looks different for 'Modificator' and 'Variant' options.

   Picture 5: *'Add/Update option' dialog box (Editing a 'Modificator' option).*

Picture 6: *'Add/Update option' dialog box (Editing a 'Variant' option).*

3. If the values of the 'Option class', 'Option text', 'Option type', 'OrderBy' and 'Availability' fields need to be changed, edit them and click on **Add/Update option**.

> If you need to add an option value, fill in the **OPTION VALUE**, **ORDERBY** and
>
> **AVAILABILITY** fields (plus **OPTION** and **SURCHARGE** fields for a 'Modificator'), then
>
> click on **Add/Update option**. A surcharge value can be positive (for mark-ups) or
>
> negative (for discounts), absolute or percent.
>
> If you need to delete an option value, select the check box next to the value you want to
>
> delete, then click on **Delete selected**.
>
> After you have finished editing the option, click on **Close**.

If your store is multilingual, you will need to add options in other languages. To add options in another language, select the language from the drop-down box in the top right corner of the 'Add/Update option' dialog, fill in the necessary fields and click on **Add/Update**.

Sometimes, when you define multiple options for one product, some option combinations may be unavailable. Setting up *exceptions* can help you deal with this problem.

For example, you sell T-shirts available in 3 colours (red, blue and brown) and 4 sizes (S, M, L and XL). You define the following options for your product 'T-shirt':

> **Picture 7:** 'Product options' dialog box (example).

Blue T-shirts are not available in size XL. You can set up an exception that will prevent your customers from putting blue XL T-shirts into the shopping cart.

To set up an exception:
  1. Scroll down to the 'Exceptions' box.

   Picture 8: *'Exceptions' dialog box.*

  2. Use the drop-down boxes to create the unavailable combination (in our example, it should be *Blue* and *XL*).
  3. Click on **Add exception**. The combination will be added to the list of unavailable option combinations in the upper section of the 'Exceptions' dialog box.

   Picture 9: *'Exceptions' dialog box (New exception has been added).*

You can modify and delete exceptions.

To modify an exception:
1. Select other option values to change the necessary option combination.
2. Click on **Modify**.

To delete an exception:
1. Select the check box next to the options combination you want to delete.
2. Click on **Delete selected**.

If you set up any exceptions, a warning message will be displayed when a customer attempts to select an unavailable combination of options:

If you want a Javascript warning to be displayed to your customers, you can use the 'Validation script (Javascript)' dialog box to create a Javascript notification.

> ***Picture 10:*** *'Validation' dialog box.*

To create a validation script:
   1. Enter the script code into the provided field.
   2. Click on **Update**.

If you set up product options as in the picture below, and use the validation script from this example, your customers will get a Javascript warning when they select the options combination 'Blue + XL' and try to add the product to the shopping cart.
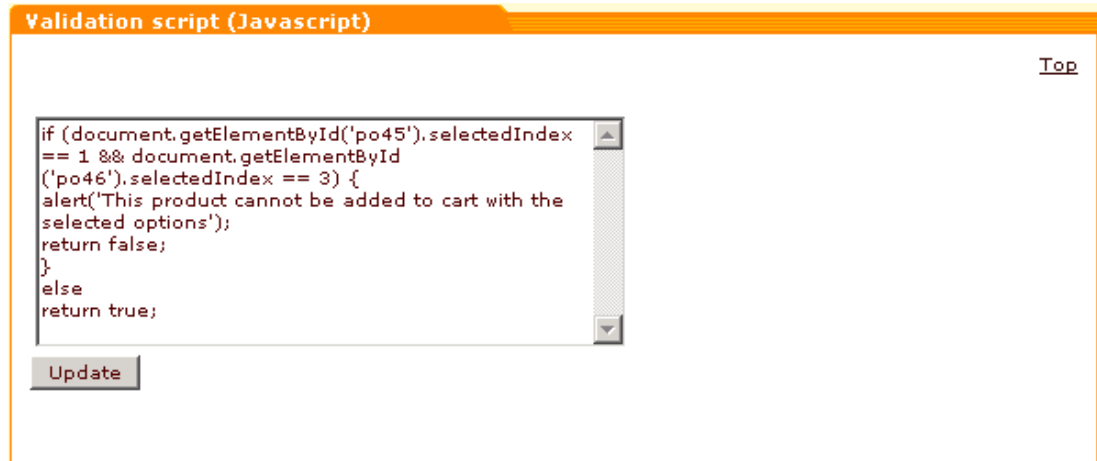
Picture 11: Product options validation (example).

Validation script (Javascript)

Top

```
if (document.getElementById('po45').selectedIndex
== 1 && document.getElementById
('po46').selectedIndex == 3) {
alert('This product cannot be added to cart with the
selected options');
return false;
}
else
return true;
```

Update

In the example script above, 'po45' stands for "product option 45'", which corresponds to the option class "Color", 'po46' stands for "product option 46'" and corresponds to the option class "Size" (45 and 46 are their ClassID numbers, taken from the # column of the 'Product options' table). 1 and 3 are the position numbers of the option variants "Blue" and "XL" respectively (Option variants within one option class are numbered starting with zero. So, within the class "Color", the number of "Red" is 0, the number of "Blue" is 1, and the number of Brown is 2. Within the class "Size", S corresponds to 0, M - to 1, L - to 2, XL - to 3). 'This product cannot be added to cart with the selected options' is the message that we want to be displayed as Javascript warning.

Picture 12: *Javascript warning shown to the customer (example).*

Microsoft Internet Explorer

⚠ This product cannot be added to cart with the selected options

OK
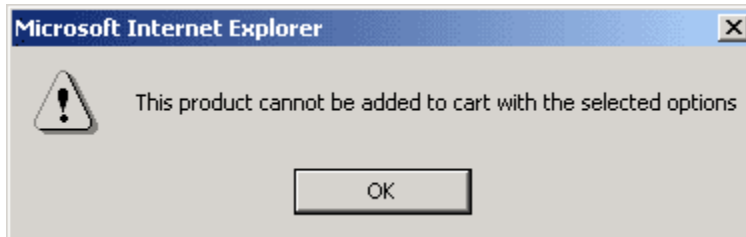
Note. Make sure you test your validation script before using it in a live store to avoid Javascript errors on the storefront.

Please note that if a customer attempts to add some product with defined product options to the shopping cart using the 'Buy Now' button, a product variant with the cheapest of the available combinations of options will be placed into the cart. If necessary, the customer then will be able to choose any other combination of options.

Related topics:

Advanced Product Management

5.2.6.5 Managing Product Variants

If you set any *Variant* type options for some product, you can look up or modify your product variants at any time: just click on **Product variants** in the 'Product Management' section menu when the necessary product is opened for modification.

For example, you sell T-shirts of 3 colors (Red, Blue, Brown) and 4 sizes (S, M, L, XL).

To define product variants:
1. Search for the product (T-shirt). Click on the product name link in the 'Search results' box to open the product for modification.
2. Click on **Product options** in the section menu. Set up product options for your T-shirts as is shown in the picture below:

Picture 1: *Variant-type options defined for T-shirts.*

3. Click on **Product variants** in the section menu. The 'Product variants' form will be opened.

Picture 2: *'Product variants' form.*

Product variants

VARIANTS	PRICE	WEIGHT	AMOUNT	SKU
Color: Brown Size: L	14.50	0	1000	SKU1613
Color: Blue Size: L	14.50	0	1000	SKU1613
Color: Red Size: L	14.50	0	1000	SKU1613
Color: Brown Size: M	14.50	0	1000	SKU1613
Color: Blue Size: M	14.50	0	1000	SKU1613
Color: Red Size: M	14.50	0	1000	SKU1613
Color: Brown Size: S	14.50	0	1000	SKU1613
Color: Blue Size: S	14.50	0	1000	SKU1613
Color: Red Size: S	14.50	0	1000	SKU1613
Color: Brown Size: XL	14.50	0	1000	SKU1613
Color: Blue Size: XL	14.50	0	1000	SKU1613
Color: Red Size: XL	14.50	0	1000	SKU1613

Update   Rebuild variants

4. Change the values in the **PRICE**, **WEIGHT** and **AMOUNT** columns. If necessary, edit **SKU** values. The **AMOUNT** column shows how many products within this or that variant are available for sale. If any of the variants is unavailable, set its amount to zero (it will be marked as 'Out of stock').

Picture 3: 'Product variants' form.

VARIANTS	PRICE	WEIGHT	AMOUNT	SKU
Size: S Color: Brown	12.50	1	20	KU16130
Size: S Color: Blue	14.50	1	100	U161300
Size: S Color: Red	12.50	1	20	U161301
Size: M Color: Brown	14.50	1	30	U161302
Size: M Color: Blue	16.50	1	100	U161303
Size: M Color: Red	16.50	1	10	U161304
Size: L Color: Brown	16.50	1	77	U161305
Size: L Color: Blue	19.50	1	59	U161306
Size: L Color: Red	16.50	1	10	U161307
Size: XL Color: Brown	19.50	1	16	U161308
Size: XL Color: Blue	19.50	1	45	U161309
Size: XL Color: Red	19.50	1	10	1613010

Product variants

Update   Rebuild variants

5. Click on **Update**.

Note. If you modify any options affecting the product variants (in the 'Product options' section), the product variants are normally updated automatically. However, if you go to the 'Product variants' section after editing product options and discover that the variants have not been updated, click on the **Rebuild variants** button at the bottom of the 'Product variants' form. The changes will be re-applied.

After you set an individual price and amount for each of the product variants, the available quantity and product price demonstrated to the customers on the product details page in the customer zone will depend on the product variant selected in the 'Options' section. For example, if we select the variant "Color: Brown + Size: L", we'll find out that there are 77 brown T-shirts of size L in stock, and the price of one T-shirt of these color and size is $16.50. However, if we select a different product variant (for example, "Color: Brown + Size: M") the quantity and price shown to us will be different (30 items available, at $14.50).

Picture 4: Dependency of the available quantity and price on the selected product variant in

the product details.

Related topics:

Advanced Product Management

5.2.6.6   Classifying the Product

The products that you are planning to use in Product Configurator need to be classified. To classify a product means to assign it to one or more product types, attribute specifications to this product (if any specifications are defined) and define requirements regulating which other products this product can be combined with.

To classify a product:

1. Find the product you want to classify. Open this product for modification in the 'Product Management' section.
2. Click the **Product classification** link in the 'Product Management' section menu. The 'Product classification' dialog box will be opened.

    Keep in mind that product types need to be defined before you try to classify your product. If you have not defined product types before you opened this section, the 'Product classification' dialog box will display the following message:

    Picture 1: *Product classification. No product types defined.*

Click the **define** **product types** link to create the necessary product types, then return to the 'Product classification' dialog box.

3. To assign the product to a product type, select the necessary type from the 'Add product type' drop-down box and click on **Submit**.

Picture 2: Product classification. Assigning the product to a product type.

The added product type appears in the upper section of the 'Product classification' box.

Picture 3: Product classification. 'Mobile Phone' product type has been added.

Note. Any product may be assigned to more than one product type.

4. If any specifications were set up for the added product type, the field below the product type name displays all the specifications within this type. To attribute a specification to the product, select the necessary specification from the list and click on **Submit**.

Picture 4: Product classification. 'Ericsson T28 World' specification has been assigned.

Note. To select multiple specifications, press and hold Ctrl key.

5. Define requirements for the product. Select the name of a product type required for this product from the drop-down list in the 'Requirements for the product' section of the dialog box. Click on **Submit**. The type will be added to the requirements list (you can set as many requirements for the product as you like). You can set more specific requirements by selecting a required specification within the required product type: select the necessary specification from the list below the required product type name, then click on **Submit**. To select multiple specifications, press and hold Ctrl key.

Picture 5: Product classification. Requirements for Ericsson T28 World mobile phone have been defined.

To delete a product type, select the check box corresponding to this type and click on **Submit**.

Related topics:

Advanced Product Management

5.2.6.7   Setting up a Subscription

You can offer your customers to subscribe to some of your products. Subscription is a good method your customers can use to pay for regular services. For example, if your company is a hosting provider your customers are most likely to make periodic payments for the time they use your hosting space. In this case you could sell your hosting package as a subscription product.

Note. You can use subscription options only if Subscriptions module is enabled. Please specify a secret key for Subscriptions module under General settings -> Modules options.

When you set up a subscription to some product, the product price becomes 'setup fee'. The pay period and the period fee can be specified in the 'Subscription' dialog box which can be accessed by clicking the **Subscriptions** link in the 'Product Management' section menu when you are editing a product.

To set up a subscription:

1. Find the product for which you want to set up a subscription. Open this product for modification in the 'Product Management' section.
2. Click the **Subscriptions** link in the 'Product Management' section menu. The 'Subscription' dialog box will be opened.

Picture 1: 'Subscription' dialog box.

3. Select the pay period from the drop-down list. You can choose between *Annually, Quarterly, Monthly, Weekly,* or define any other period you want by using the *By period* entry and specifying the number of days in the period in the field below.
4. Enter the period fee. Period fee is how much the customer will pay per period. For example, if your monthly hosting package costs $20, you should enter 20.00 for the period fee.
5. Enter the cost of one day (**COST OF ONE DAY**) and the number of days in the period specified in the Pay period field (**DAYS SAME PERIOD**).

    Your customers do not have to wait till the beginning of the next pay period to start using your subscription services. If a customer subscribes to your product one or more days before the beginning of the next full pay period, he can start using the product and will be supposed to pay for the real number of days he uses the product before the next pay period begins. For example, you set your pay period to '*Monthly*' and collect fees for your services on the 10th day of every month. If a customer subscribes on the 1st day of the month (10 days before the next pay period begins) in the current period he will be supposed to pay for 10 days. To find out how much the customer should pay for 10 days you will need to multiply the cost of one day by 10. X-Cart Subscriptions module does the job for you: you will need only to specify the cost of one day of using the product and the number of days in the period specified in the 'Pay period' field. The sum that your customer pays when he buys a subscription includes 'setup fee' and payment for the days before the beginning of the next full pay period. It is calculated according to the formula: setup fee + (the number of days before the next pay period * cost of one day). The cost of one day may be found by dividing your period fee by the number of days in the period. If the period fee is $20, and the pay period is set to '*Monthly*', the cost of one

day will be calculated as follows: $20.00 (period fee) / 30 days (the average number of days in a month) = $0.666667

Picture 2: *Subscription. 'Monthly' example.*

Subscription			
PAY PERIOD	**PERIOD FEE ($)**	**COST OF ONE DAY ($)**	**DAYS SAME PERIOD**
Monthly	20.00	0.666667	30
days			
Apply Delete Pay dates			

If the period fee is $90, and the pay period is set to "By Period - 45 days", the cost of one day will be calculated as follows: $90.00 (period fee) / 45 days (the number of days in the period) = $2.00

Picture 3: *Subscription. 'By period' example.*

Subscription			
PAY PERIOD	**PERIOD FEE ($)**	**COST OF ONE DAY ($)**	**DAYS SAME PERIOD**
By Period	90.00	2.000000	45
45 days			
Apply Delete Pay dates			

6. Click on **Apply**. **Pay dates** button will appear.
7. Click on **Pay dates** button. Use the calendar to select the dates on which your customers will be supposed to make subscription payments.

Picture 4: *Calendar.*
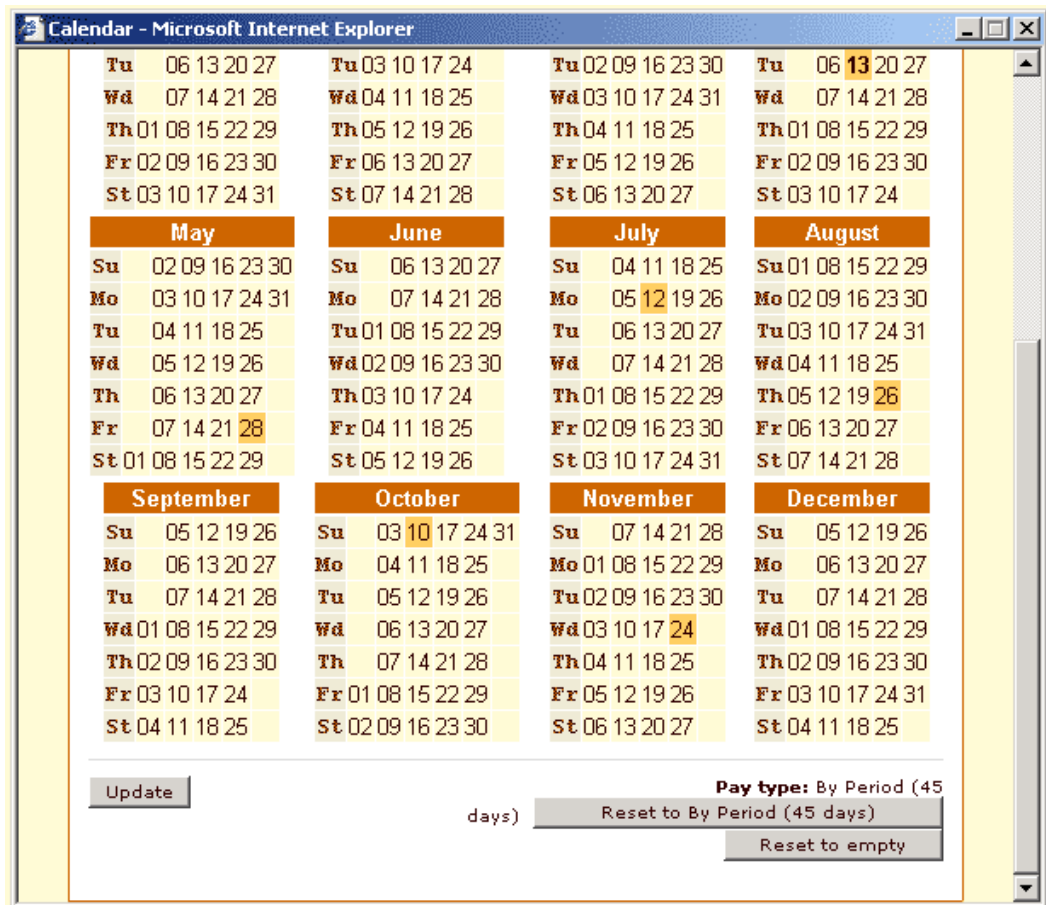
You may accept the dates offered by the program or select different dates. All selected dates can be unselected at once by clicking on **Reset to empty** button. To select a pay date click on the appropriate date. It will be highlighted. To unselect a date click on it once again. You will be able to return to the first variant offered by the program at any time by clicking on **Reset to... (your pay period)** button. As soon as you are satisfied with your payment schedule, click on **Update**.

To delete a subscription, click on **Delete**.

Note: If you want to use the Subscriptions module you need to adjust a scheduling program to periodically run the script *<xcart_dir>*/**admin**/**pay_subscription.php**. (on UNIX platforms it is usually `cron`)

For example:
```
/usr/bin/curl --get http://www.mystore.com/admin/pay_subscription.php?
key=secret
/usr/bin/wget -q -O- http://www.mystore.com/admin/pay_subscription.php?
key=secret
/ustr/bin/fetch -o- http://www.mystore.com/admin/pay_subscription.php?
key=secret
```

where 'secret' is your secret key for Subscriptions module (set under General settings -> Modules options)

Related topics:

<u>Advanced</u> <u>Product Management</u>

5.2.6.8   Setting Wholesale Prices

You can define wholesale prices for products. These prices are generally lower and depend on the quantity of the product items being ordered and/or on the membership level of the customer who orders them.

To set wholesale prices:
1. Find the product for which you want to set wholesale prices. Open this product for modification in the 'Product Management' section.
2. Click the **Wholesale prices** link in the 'Product Management' section menu. The ''Wholesale prices' dialog box will be opened.

   Picture 1: 'Wholesale prices' dialog box. No wholesale prices added.

   The price of one item without the wholesale discounts for all membership groups is displayed for your convenience in the first line of the prices list.
3. Enter the quantity of the product beginning from which your new wholesale price should be applied.
4. Enter the wholesale price.
5. Select the <u>membership</u> <u>group</u> that you want to be able to purchase the product at this price.
6. Click on **Add/Update**. The new wholesale price will be added to the prices list.

   Picture 2: 'Wholesale prices' dialog box. A wholesale price (49.99 pounds) has been added for customers of 'Wholesale' membership level purchasing 10 or more items.

7. Repeat steps 3-7 to add more wholesale prices for this product.

If you want to delete a price, click on **Delete** next to the price you want to delete.

Note. Instead of adding wholesale prices one by one, you can import them from a CSV file. For details please refer to the help topic 'Importing Products' (See 'Notes on product prices import').

Related topics:

Advanced Product Management

Importing Products

5.2.6.9   Adding and Removing Upselling Links

Any product at your store can be associated with other products with the help of upselling links. They convince your customers viewing the details of some product to buy additional products that are in some way 'related' to the product they are viewing.

To add an upselling link:

1. Find the product for which you want to create upselling links. Open this product for modification in the 'Product Management' section.
2. Click the **Upselling links** link in the 'Product Management' section menu. The 'Upselling links' dialog box will be opened.

   Picture 1: *Upselling links.*

Upselling links

POS.	PRODUCT ID	SKU	PRODUCT	
0	#64	SKU64	**Microsoft FrontPage 2000**	Delete
0	#174	SKU174	**Windows Millennium**	Delete

Add new link

Product: [   ] Browse...
Bidirectional link ☐

Add/Update

3. Click on **Browse**, the 'Select product' box will appear.
4. Choose a category and click on **Show products**. All the products of the chosen category will be listed in the right side of the box.
5. Choose a product from the list and click on **Select**. The product title will appear in the 'Add new link' field. Alternatively you can bookmark several products and select them later one by one by clicking on the product title links in the bookmarks list.
6. If you want to link two products with each other, select the **Bidirectional link** check box.
7. Click on **Add/Update**. The product will be added to the list in the 'Upselling links' dialog box. A link to this product will appear in the 'Related products' section of the Product Detailed View page in the customer zone.

Picture 2: 'Related products' section of the product detailed view page.

Related products

#64   Microsoft FrontPage 2000
#174   Windows Millennium

8. Repeat steps 3-8 to add more links.

To delete an upselling link, click on **Delete** next to this link in the 'Upselling links' dialog box.

Related topics:

Advanced Product Management

5.2.6.10   Adding and Removing Detailed Images

You can add detailed images for a better presentation of the product on the Product Detailed View page.

To add detailed images:
1. Find the product for which you want to add detailed images. Open this product for modification in the 'Product Management' section.
2. Click the **Detailed images** link in the 'Product Management' section menu. The 'Detailed

images' dialog box will be opened.

Picture 1: Detailed images.

3. Click on **Browse**, the 'Image selection' box will *a*ppear.
4. You can use images located on the server, on your local computer, or on the Internet. Locate the image file and click on **Apply.**
5. After the product page reloads enter alternative text into the text field.
6. Click on **Upload**.
7. If necessary, set the order in which the detailed images should be displayed by entering the appropriate position numbers.
8. Use the 'Availability' selectbox to specify if the image should be displayed on the storefront.
9. Click on **Update**.
10. Repeat steps 3-10 to add more images.

To delete a detailed image, click on **Delete** next to this image in the 'Detailed images' dialog box.

Related topics:

Advanced Product Management

5.2.6.11 Editing Customer Reviews

You can edit customer reviews for abuse prevention purposes.

To edit customer reviews:
1. Find the product for which you want to edit customer reviews. Open this product for modification in the 'Product Management' section.
2. Click the **Customer Reviews** link in the 'Product Management' section menu. The 'Edit reviews' dialog box will be opened.

    Picture 1: 'Edit reviews' dialog box.

3. Edit text in the review message field.
4. Click on **Add/Update**.

You can add reviews of your own in the 'Add new review' area:
1. Enter your e-mail address and review message text.
2. Click on **Add/Update**.

To delete a review, click on **Delete** next to the review you want to delete.

Related topics:

Advanced Product Management

5.2.6.12 Defining the Product Manufacturer

Each product in your store can be assigned to one of the product manufacturers created in the 'Manufacturers' section (Products menu -> Manufacturers).

To define the product manufacturer:
1. Find the product for which you want to define a manufacturer. Open this product for modification in the 'Product Management' section.
2. Click the Manufacturer link in the 'Product Management' section menu. The 'Select manufacturer' dialog box will be opened.

Picture 1: 'Select manufacturer' dialog box.

3. From the drop-down list select the manufacturer to which the product should be assigned.
4. Click on **Update**.

Related topics:

[Advanced](#) [Product Management](#)

5.2.7 Deleting Products

You can easily delete products you do not need. To delete a product:

1. Click on **Delete product** in the Products menu. X-Cart 'Product Management' section will be opened.
2. Use the provided 'Search for products' form to find the product(s) you would like to delete. The products found by your search query will be listed in the 'Search results' form.

Picture 1: Search results.

3. Select the check boxes next to the product(s) you want to delete. Click on **Delete selected**. The 'Confirmation' box will appear.

Picture 2: Confirmation box.

4. Click on **Yes** to confirm your intention to delete the product. Click on **No** to return to the 'Search results'.

5.2.8   Cloning Products

If you need to create a new product similar to some product already existing in your store, use the 'clone' feature. It allows you to automatically create a copy of a product in the database (a new product with all the options of the initial product) - which can be modified and saved as a new product. To create a 'clone' product:

1. Click on **Search for products** in the Products menu. X-Cart 'Product Management' section will be opened.
2. Use the provided 'Search for products' form to find the product you would like to clone. The products found by your search query will be listed in the 'Search results' form.

Picture 1: Search results.

3. Select the check box next to the product you would like to clone and click on **Clone product**

in the lower part of the 'Search results' form. The 'clone' product will be created and the 'Product details' form will be opened allowing you to edit the 'clone' product details.

Picture 2: Product details form.

4. Edit the details of the 'clone' product (change the thumbnail picture, the name, etc) and save the changes by clicking on **Save** at the bottom of the page. The product will be updated.

5.2.9 Generating HTML Links to Products

You may find it necessary to put links to products in X-Cart database on external HTML pages (in the same store or on a different web site). X-Cart has the ability to generate HTML code that can be integrated into HTML pages to create these links. The HTML links generated by X-Cart provide 'Add to Cart' functionality: using such a link your customer will be able to add the product to cart directly from the page where a link to this product is located.

To generate HTML links:
1. Click on **Search for products** in the Products menu. X-Cart 'Product Management' section will be opened.
2. Use the provided 'Search for products' form to find the product for which you would like to

generate HTML-links. The products found by your search query will be listed in the 'Search results' form.

Picture 1: *Search results.*

3. Select the check box next to the product for which you would like to create an HTML-link. Click on **Generate HTML-links**. The 'Product links' section will be opened.
4. Use the link from the 'Link to product thumbnail' form to put on your external page a link to the product thumbnail.

Use the link from the 'Simple HTML link to add 1 product to cart' form to create a simple 'Add to cart' link using which your customers will be able to put one product to the shopping cart.

Use the link from the 'Advanced HTML link with selectable quantity and product options support' form to create a more complex link using which your customers will be able to select the quantity and some options of a product before adding it to the shopping cart.

Picture 2: *Link to product thumbnail.*

Picture 3: *Simple HTML link to add 1 product to cart.*

Picture 4: Advanced HTML link with selectable quantity and product options support.

5.2.10   Importing Products

You can import products into X-Cart store using CSV format lists (MS Excel compatible). Thus you can keep shop information up to date by importing product list files instead of updating information through the web interface. Large imports can take some time, so please be patient.

To import a list of products:

1. Click on **Import products** in the Products menu. The 'Import products' form will appear.

   Picture 1: *Import products form.*

Import products

Column order:

The list below defines the order of columns in your CSV file ('NULL' means there is no field).

0:	productid	10:	shipping_freight	20:	manufacturerid
1:	productcode	11:	free_shipping	21:	return_time
2:	product	12:	discount_avail	22:	category
3:	distribution	13:	min_amount	23:	price
4:	weight	14:	dim_x	24:	thumbnail
5:	list_price	15:	dim_y	25:	product_options
6:	descr	16:	dim_z	26:	extra_fields
7:	fulldescr	17:	low_avail_limit	27:	manufacturer
8:	avail	18:	free_tax	28:	applied_taxes
9:	forsale	19:	product_type		

----
break--

☐ Get column names from the first row of the CSV file (disable columns order above)

CSV delimiter:
Semicolon

Default category (this will be used if the category is not specified in the CSV file):
Books

Category path separator for "category" field (e.g. Books///Software):
///

Directory where images are located (this will be used if image file is specified without path; this should be an absolute path,
e.g.: /u/svowl/public_html/eshop_dohtur/files/provider/images_backup):

CSV file is located on the server (this should be an absolute path,
e.g.: /u/svowl/public_html/eshop_dohtur/files/provider):

CSV file for upload:
[   ] Обзор...
Warning! Maximum file size that can be uploaded: 2Mb.

Note: It is strongly recommended to export products before importing to avoid corrupting your database if import fails.

▶ Import products   ☐ Drop all products before import

▶ Store Layout

2. Set the order of columns so that it will be the same as the order used in the CSV file you are

going to import.

> **Note**: You do not have to supply values for all the fields. However, filling out **price**, **product**, **descr** and **avai** fields is mandatory as they are required for the application to work correctly. If you are planning to use "UPDATE INVENTORY" function for further quantity or price updating it's necessary to define **product_code** as updates are done only by the field product_code.

- **productid**- Product id
- **productcode** *(recommended)* - Product code or SKU.
- **product*** *(required)* - Product name.
- **distribution** - Product distribution (for EGoods)
- **weight** - Product weight
- **list_price** - List price
- **descr*** *(required)* - Description
- **fulldescr** - Detailed description
- **avail*** *(required)* - Quantity in stock (items)
- **forsale** - Available for sale Y or N
- **shipping_freight** - Shipping freight
- **free_shipping** - Free shipping Y or N
- **discount_avail** - Apply global discounts Y or N
- **min_amount** - Min order amount
- **dim_x** - x dimension of the product package (for shipping)
- **dim_y** - y dimension of the product package (for shipping)
- **dim_z** - z dimension of the product package (for shipping)
- **low_avail_limit** - Low limit in stock
- **free_tax** - Non-taxable Y or N
- **product_type** - Product type
- **manufacturerid** - Manufacturer id
- **return_time** - Time during which the product can be returned to the store
- **category** - Product category (see Notes on product categories import)
- **price*** *(required)* - Price of the product (see Notes on product prices import)
- **thumbnail** - Thumbnail image file name

> **IMPORTANT!** Thumbnail images can be imported only from the directory `xcart_dir/files` (*X-Cart Gold*) or `xcart_dir/files/ login_of_provider` (*X-Cart Pro*). Thus, before importing, be sure to put all your images into one of these directories (depending on the version of your X-

Cart).

Please be aware that X-Cart will need to know the absolute path to each of the image files being imported. You can specify absolute filepaths to images directly in the "thumbnail" field of the CSV file or use the "thumbnail" field just for file names and specify the absolute path to the directory from which images should be imported in the field 'Directory where images are located' lower in the 'Import products' form.

- **product_options** - Product options (see Notes on product options import)

- **extra_fields** - Extra fields (see Notes on extra fields import)

- **manufacturer** - Product manufacturer

- **applied_taxes** - Taxes applied to the product (see Notes on applied taxes import)

3. Select the delimiter used in the CSV file you are going to import.
4. Select the default category. If the value of the category field is not specified in the CSV file, the default category will be applied.
5. Enter the category path separator for "category" field (e.g. Books///Software).
6. If you are going to import thumbnail images for products:
a. Locate the directory **files** within your X-Cart directory (the directory where your X-Cart-based store is installed).
b. Put all the images you want to import:

- (if you are using *X-Cart Gold*) inside the directory **files** (e.g., `xcart_dir/files` or `xcart_dir/files/images`);

- (if you are using *X-Cart Pro*) inside the directory **files**/**login_of_provider** (e.g., `xcart_dir/files/provider_x` or `xcart_dir/files/provider_x/images`).

c. Do one of the following:

- If you have entered individual file names into the "thumbnail" fields of your CSV file, use the field 'Directory where images are located' of the 'Import products' form to specify the absolute path to the directory where you have put your thumbnail images.

- If you have entered absolute filepaths to image files into the "thumbnail" fields of your CSV file, leave the field 'Directory where images are located' empty.

7. Do one of the following:

- Enter the location of the CSV file if you have uploaded it before, or

- Click on **Browse** and select the necessary CSV file.

8. Click on **Import products**.

If you want to drop all existing products in your store before you import new products, select the **Drop all products before import** check box. Be careful, this operation cannot be undone.

Example 1. You have data in the following format:

```
10;SKU10;Leather jacket;250;5;This jacket is made of natural
leather;Clothes/Jackets;jacket.gif

20;SKU20;Black gloves;30;0.5;Fine quality gloves;Clothes/
Gloves;gloves.gif
```

You should set the columns order in the following way:

```
0: productid
1: productcode
2: price
3: weight
4: descr
5: category
6: thumbnail
```

The rest of the columns should be set to NULL.

If your file format is not the same, you should set a different columns order.

"Leather Jacket" will be placed into the subcategory "Jackets" of "Clothes" category and "Black Gloves" into the subcategory "Gloves" of the same category.

Note. X-Cart has the ability to import CSV files with field names in the first row . This helps to re-import products that have just been exported to a CSV file. To do this you need to select the option 'Get column names from the first row of CSV file' on the 'Import products' form.

Example 2. You have data in the following format:

```
productid;productcode;product;price;weight;descr;category;
thumbnail

10;SKU10;Leather jacket;250;5;This jacket is made of natural
leather;Clothes/Jackets;jacket.gif

20;SKU20;Black gloves;30;0.5;Fine quality gloves;Clothes/
Gloves;gloves.gif
```

In this case there is no need to set the order of columns for product import in accordance with the CSV file manually: all you need to do is to select the 'Get column names from the first row of CSV file' check box.

Note. You can use product import for adding new products. It may be especially convenient if the products you want to add do not differ much from the products which are already in your database.

Example 3. You have exported your products to a CSV file of the following format:

```
productid;productcode;product;price;weight;descr;category;
```

```
thumbnail
```

```
20;SKU20;Black gloves;30;0.5;Fine quality gloves;Clothes/
Gloves;gloves.gif
```

You want to add a new product - 'Red gloves' - by importing it into X-Cart. 'Red gloves' are practically the same as 'Black gloves', but these two products differ in color, and you want the product 'Red gloves' to have its own productid, SKU, product name and thumbnail picture. There are two ways of creating the product 'Red gloves' based on X-Cart product import functionality:

1. Add to the existing CSV file a line about Red gloves, then re-import the CSV file into X-Cart. In this case you will have either to invent new productid and SKU for the new product:

```
productid;productcode;product;price;weight;descr;category;
thumbnail
```

```
20;SKU20;Black gloves;30;0.5;Fine quality gloves;Clothes/
Gloves;gloves.gif
```

```
30;SKU30;Red gloves;30;0.5;Fine quality gloves;Clothes/Gloves;
gloves1.gif
```

or to leave 'productid' and/or 'productcode' fields for 'Red gloves' empty:

```
productid;productcode;product;price;weight;descr;category;
thumbnail
```

```
20;SKU20;Black gloves;30;0.5;Fine quality gloves;Clothes/
Gloves;gloves.gif
```

```
;;Red gloves;30;0.5;Fine quality gloves;Clothes/Gloves;
gloves1.gif
```

If you leave the first one or two fields for the new product empty, their values will be generated automatically when the new product is added to the database.

2. Create a CSV file containing information about just one product - 'Red gloves'. Do not use the fields 'productid' and 'productcode' at all:

```
product;price;weight;descr;category;thumbnail
```

```
Red gloves;30;0.5;Fine quality gloves;Clothes/Gloves;gloves1.
gif
```

The necessary productid and SKU for 'Red gloves' will be created automatically.

Notes on product categories import

You can have more than one **category** column in your CSV file - one for the product main category and the necessary number of columns for the additional categories (if any). For example, you are going to import a product which is a book and which you want to be located in two categories: 'Books/Internet' (main) and 'Books' (additional). If you have chosen to use /// as the category path separator, your CSV file should have two **category** columns:

```
category;category
```

```
Books///Internet;Books
```

Note: The symbol "\" is reserved and cannot be used as a category path separator.

Tip: If your CSV file contains several **category** fields, you can use the 'Get column names from the first row of CSV file' functionality to let X-Cart know the order in which fields are being imported.

Notes on product prices import

You can have more than one **price** column in your CSV file - one for the basic product price and the necessary number of columns for the wholesale prices (if any). Basic product price is entered into the field 'as is' (If, for example, a product costs $0.99, you only need to enter 0.99 into the **price** field). For the import of membership-specific prices use the following format:

```
Membership:Quantity:Price
```

For example, if you want to describe a wholesale price according to which ''Wholesale' customers can purchase 5 or more items of some product at $0.89 per item, the contents of one of your price fields must look as follows: 'Wholesale:5:0.89'

If a price applies to all membership groups, the 'Membership' part can be omitted: '5:0.89' means that any user can purchase 5 or more items of the product at $0.89 per item.

Tip: If your CSV file contains several **price** fields, you can use the 'Get column names from the first row of CSV file' functionality to let X-Cart know the order in which fields are being imported.

Notes on extra fields import

For example, you need to import the following extra fields:

> UPC
>
> ISBN
>
> Artist
>
> Publisher
>
> Pages

The **extra_fields** field in the CSV file for import into X-Cart should be filled in as follows :

```
field=UPC&&&value=%VALUE%###field=ISBN&&&value=%VALUE%
```

```
###field=Artist&&&value=%VALUE%

###field=Publisher&&&value=%VALUE%###field=Pages&&&value=%
VALUE%
```

where %VALUE% must be replaced with the actual field values.

Notes on product options import

Note. If a product has defined product options, they are deleted before import.

For *Modificator* type options use the following **product_options** field format:

```
/*
<Class>
<Name></Name>                          'Option class name
<Text></Text>                          'Text description of the option class
<Type></Type>                          'Option type (Y for Modificator)
<Avail></Avail>                        'Availability, Y or N
<OrderBy></OrderBy>                    'Sorting position of the class
<Options>
<Option>
<ID></ID>                              'Option variant ID
<Name></Name>                          'Option variant name
<Avail></Avail>                        'Availability, Y or N
<OrderBy></OrderBy>                    'Sorting position of the option variant
<PriceModifier></PriceModifier>        'Price modifier value (positive or
negative)
<ModifierType></ModifierType>          'Modifier type ($ or % for Modificator)
</Option>
...
</Options>
</Class>
...
<Exception>
<ID></ID>                              'ID of exception component
...
</Exception>
...
<JScode></JScode>                      'JavaScript validation code
*/
```

Example 1. Modificator type options.

Information about the product options from Example 1 shown in the picture above can be entered into the **product_options** field as follows:

```
<Class>

<Name>Cover</Name>

<Text>Choose cover type</Text>

<Type>Y</Type>

<Avail>Y</Avail>

<OrderBy>0</OrderBy>

<Options>

<Option>
```

```
<ID>10</ID>
<Name>Soft</Name>
<Avail>Y</Avail>
<OrderBy>10</OrderBy>
<PriceModifier>0.00</PriceModifier>
<ModifierType>$</ModifierType>
</Option>
<Option>
<ID>11</ID>
<Name>Hard</Name>
<Avail>Y</Avail>
<OrderBy>20</OrderBy>
<PriceModifier>5.00</PriceModifier>
<ModifierType>$</ModifierType>
</Option>
</Options>
</Class>
<JScode></JScode>
```

For *Variant* type options use the following **product_options** field format:

```
/*
<Class>
<Name></Name>                          'Option class name
<Text></Text>                          'Text description of the option class
<Type></Type>                          'Option type (empty for Variant)
<Avail></Avail>                        'Availability, Y or N
<OrderBy></OrderBy>                    'Sorting position of the class
<Options>
<Option>
<ID></ID>                              'Option variant ID
<Name></Name>                          'Option variant name
<Avail></Avail>                        'Availability, Y or N
<OrderBy></OrderBy>                    'Sorting position of the option variant
<PriceModifier></PriceModifier>        'Price modifier value (0.00 for Variant)
<ModifierType></ModifierType>          'Modifier type (empty for Variant)
</Option>
```

```
...
</Options>
</Class>
...
<Exception>
<ID></ID>                          'ID of exception component
...
</Exception>
...
<Variant>
<SKU></SKU>                        'Product variant SKU
<Avail></Avail>                    'Availability, Y or N
<Weight></Weight>                  'Product variant weight
<Price></Price>                    'Product variant price
<Items>
<ID></ID>                          'ID of product variant component
...
</Items>
</Variant>
...
<JScode></JScode>                   'JavaScript validation code
*/
```

Example 2. *Variant type options.*

Add/Update option

Language [English ▾]

Option class [Size]

Option text [Choose size]

Option type [Variant ▾]

OrderBy [10]

Availability ☑

	OPTION VALUE	ORDERBY	AVAILABILITY
☐	L	0	☑
☐	XL	0	☑

Option values list

Add option value

			☑

[Delete selected]

[Add/Update option] [Close]

Information about the product options from Example 2 shown in the picture above can be entered into the **product_options** field as follows:

```
<Class>
<Name>Size</Name>
<Text>Choose size</Text>
<Type></Type>
```

```
<Avail>Y</Avail>
<OrderBy>10</OrderBy>
<Options>
<Option>
<ID>22</ID>
<Name>L</Name>
<Avail>Y</Avail>
<OrderBy>0</OrderBy>
<PriceModifier>0.00</PriceModifier>
<ModifierType></ModifierType>
</Option>
<Option>
<ID>23</ID>
<Name>XL</Name>
<Avail>Y</Avail>
<OrderBy>0</OrderBy>
<PriceModifier>0.00</PriceModifier>
<ModifierType></ModifierType>
</Option>
</Options>
</Class>
<Class>
<Name>Color</Name>
<Text>Choose color</Text>
<Type></Type>
<Avail>Y</Avail>
<OrderBy>20</OrderBy>
<Options>
<Option>
<ID>122</ID>
<Name>Red</Name>
<Avail>Y</Avail>
<OrderBy>0</OrderBy>
<PriceModifier>0.00</PriceModifier>
<ModifierType></ModifierType>
</Option>
<Option>
<ID>123</ID>
<Name>White</Name>
<Avail>Y</Avail>
<OrderBy>1</OrderBy>
```

```
<PriceModifier>0.00</PriceModifier>
<ModifierType></ModifierType>
</Option>
</Options>
</Class>
<Variant>
<SKU>SKU10</SKU>
<Avail>70</Avail>
<Weight>1</Weight>
<Price>59.99</Price>
<Items>
<ID>22</ID>
<ID>123</ID>
</Items>
</Variant>
<Variant>
<SKU>SKU100</SKU>
<Avail>100</Avail>
<Weight>1</Weight>
<Price>61.99</Price>
<Items>
<ID>23</ID>
<ID>123</ID>
</Items>
</Variant>
<Variant>
<SKU>SKU101</SKU>
<Avail>98</Avail>
<Weight>1</Weight>
<Price>59.99</Price>
<Items>
<ID>22</ID>
<ID>122</ID>
</Items>
</Variant>
<Variant>
<SKU>SKU102</SKU>
<Avail>36</Avail>
<Weight>1</Weight>
<Price>61.99</Price>
<Items>
```

```
<ID>23</ID>
<ID>122</ID>
</Items>
</Variant>
<JScode></JScode>
```

For *Text field* type options use the following **product_options** field format:

```
/*
<Class>
<Name></Name>                    'Option class name
<Text></Text>                    'Text description of the option class
<Type></Type>                    'Option type (T for Text field)
<Avail></Avail>                  'Availability, Y or N
<OrderBy></OrderBy>              'Sorting position of the class
<Options></Options>             'Options (Empty for Text field)
</Class>
<JScode></JScode>                'JavaScript validation code (Empty for
Text field)
*/
```

Example 3. *Text field type options.*

Information about the product options from Example 3 shown in the picture above can be entered into the **product_options** field as follows:

```
<Class>

<Name>Message</Name>

<Text>Enter your message</Text>

<Type>T</Type>

<Avail>Y</Avail>

<OrderBy>1</OrderBy>

<Options></Options>

</Class>

<JScode></JScode>
```

Notes on applied taxes import

applied_taxes field can contain service names of taxes which must be applied to the product being imported. The service names must be delimited by &&&. For example, if the service names of the applied taxes are VAT and VAT17_5, the **applied_taxes** field should be filled in as follows:

```
VAT&&&VAT17_5
```

 Tip: If you are still not sure what data format must be used for some field in the CSV file for import, use the provider/admin interface of your store to add a product with characteristics similar to those of the product(s) you want to import, then export the products and see what kind of

format you've got for this field in the resulting CSV file.

Related topics:

Exporting Products

5.2.11   Importing Detailed Images

You can either add detailed images to your products one by one as it is described in Modify product>Adding and removing detailed images, or automate this process. To use import images feature you have to upload images onto the server and prepare a CSV file with the products IDs, names of image files and alt text for images.

Example of a CSV file with column order "productid; image; alt; avail":

```
166653;keyboard01.jpg;Keyboard;Y

166653;keyboard02.jpg;Keyboard;Y

166654;printer01.jpg;printer;Y

166654;printer02.jpg;printer;Y

166673;printer03a.jpg;printer;Y
```

To import detailed images:
1. Prepare a CSV file with the products IDs and names of the images you want to upload.
2. Click on **Import images** in the Products menu and the 'Import detailed images' form will appear.
   > **Picture 1:** *Import detailed images form.*

3. Define the field layout:

- **productid** (*required*) - a unique ID of the product to which the image refers. (This ID is automatically assigned to the product at the time of its creation. When you search for a product in admin or provider interface, productid is displayed in the search results).

- **productcode** *(recommended)* - Product code or SKU.

- **image** (*required*) - location of the detailed image file (URL or absolute path to the image file on the server) or image file name. If you specify just the image file name (without a location), the system will attempt to import the file from the directory specified in the '**Directory where images are located**' field. JPEG or GIF files may be used.

- **alt** - alternative text description for the image (displayed if a customer's browser does not display graphics)

- **avail** - defines if this image should be displayed on not (possible values Y/N)

Note. If you do not need any of the fields, set its value to NULL.

4. Select the delimiter used in the CSV file: Tab, Comma or Semicolon
5. Enter the path to the directory where your images are located (on the server where X-Cart is installed). The full path on the server file system should be specified (e.g. /home/john/ images or C:\MyImages). If file location is specified in the '**image**' field, the field '**Directory where images are located**' will be ignored.
6. Do one of the following:

   • Enter the path to the CSV file if you have uploaded it locally.

   • Click on **Browse** and select the CSV file on your computer.
7. Click on **Import images** button.

Example CSV file (with *alt, productcode* and *avail* fields set to NULL and semicolon for the delimeter):

16387; image1.gif

16387; image45.gif

1543; big_picture2.gif

3267; myshot.jpg

3267; myshot1.jpg

3267; myshot2.jpg

3267; myshot3.jpg

Please note that you can add more than one detailed images for one product at a time: just add more lines to your CSV file (with the same value for productid and different file names).

The detailed images being imported do not replace the existing images - they are added to them.

Note. Please refer to the topic 'Importing Products' for information about importing product thumbnails.

Related topics:

Advanced Product Management
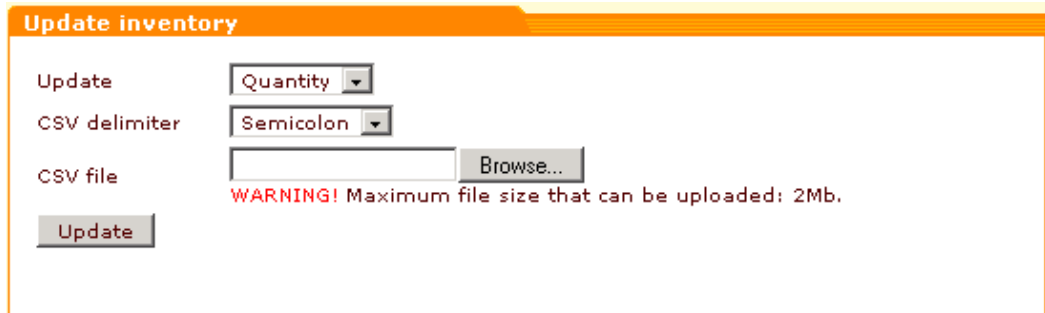
5.2.12   Updating Inventory

You can use Update inventory functionality to update the quantity or price of the products in your store. This functionality is available through the 'Update inventory' section in admin/provider area.

1. Prepare an update CSV file consisting of lines with two comma-separated fields:

- SKU
- quantity or price

2. Click on **Update inventory** in the Products menu of admin/provider zone. 'Update inventory' form will be displayed.

Picture 1: Update inventory form.

3. Select the field you are going to update (quantity or price).
4. Specify the delimiter used in your CSV file.
5. Click on **Browse** to locate your CSV file.
6. Click on **Update**.

Note. Inventory updating does not affect any wholesale prices defined for your products: only basic prices are updated. However, because of the fact that product variants have different SKU codes, 'Update inventory' functionality can be used to update the quantity and price of product variants: just include the SKU codes and prices/quantities of product variants into your CSV file in the same way as those of separate products.

Related topics:

Updating Products' Quantity and Price

5.2.13 Exporting Products

You can export lists of products to CSV files (MS Excel compatible). This feature enables you to edit product lists which can then be re-imported into X-Cart, instead of updating information through the web interface. Large exports can take some time, so please be patient.

To export a list of products:
1. Click on **Export products** in Products menu to open the 'Export products' form.

Picture 1: Export products form.

2. Choose a delimiter from the drop-down menu. (Tab is recommended, because comma and semicolon could appear in product description).
3. If you are planning to backup product thumbnails and detailed images, specify the full path to the directory where the image files should be stored. Make sure the directory exists and has permissions for writing. If you do not want to backup product thumbnails and detailed images, select the corresponding check box.
4. Click on **Export products** and save the file.

> **Note**. The list of your products is exported in the format described in "/main/products_export. tpl" template.

Froogle Export
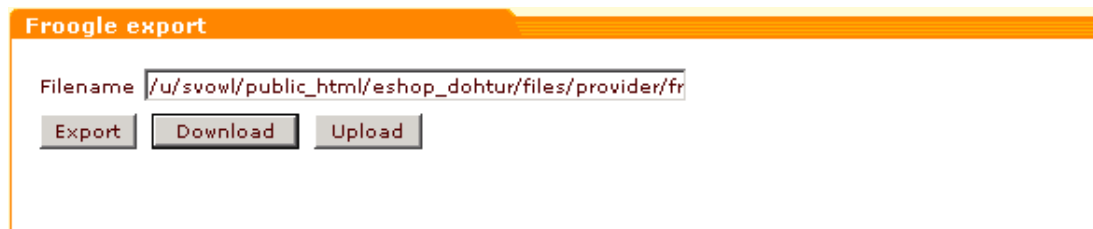
Froogle is an extension of the Google search engine that millions of people around the globe use daily to research products before they purchase. Listing your product in Froogle is a free way to extend the reach of your marketing efforts to millions of new customers.

X-Cart has a special module that enables you to submit a data feed to Froogle directly from your store. Doing so will ensure that your entire product catalog is included in Froogle, and it will also allow you to control the freshness and accuracy of your product information.

If you want to use X-Cart Froogle module, enable it via Administration -> Modules.

Then go to the Froogle export section of your store (Products menu -> Export products -> Froogle export).

Picture 2 Froogle Export form.

In this form the Filename field shows the path to the file on your server to which the data will be saved by default. You may choose a different location on your server (Mind that it should be a file

path, not an URL!).

To save the information about your products in Froogle compatible format, click on **Export**. It will be saved to the location specified in the 'Filename' field.

To download this file onto your local computer, click on **Download**.

To submit the information to Froogle, click on **Upload**.

Note. If you use Froogle, make sure your thumbnail images are stored on the file system: the Froogle export file contains information about the location of the product images on the file system. If no thumbnail image for a product is found on the file system, the default_image.gif file ("No Image Available") is used for this product. Also be aware of the fact that HTML tags used in product descriptions are dropped on export and that only the first 1000 characters of the product descriptions are displayed to the users finding products via Froogle.

Related topics:

Importing Products

5.2.14   Adding Extra Fields to the Product Table

You can add additional non-standard fields to the product table. For example, this might be used to add 'Author' and 'ISBN' fields to a product that is a book.

To add an extra field:
1. Click on **Extra fields** in the Products menu.
2. Use the 'Add extra field' subsection of the 'Extra fields' form to enter a name for the new field and the default value for this field (The default values are not shown to customers unless they are approved by the admin/provider).

Picture 1: *Adding an extra field.*

3. Click on **Apply**.

If you want to remove an extra field, select the check box next to it and click on **Delete selected**. You can use the **Check all / Uncheck all** links to select or unselect all the boxes.
If you do not want to make a field visible to your customers, unselect the **Show** check box next to the extra field and click on **Apply**.

Picture 2: Extra field will appear in the product table

An extra field does not appear on the product details page of a product in the customer zone until a value is assigned to it by the admin/provider in the product details section of this specific product. To assign a value to some extra field in the product details, open the product for modification, go to its product details section, make sure the default value displayed in the corresponding extra field is correct, otherwise replace it by the correct value, then click on **Submit changes**.

Note. If a provider adds an extra field to the product table it will be added to all the products of this provider.

Note. In X-Cart PRO the store admin can limit the number of extra fields per provider (

General settings -> General options -> Extra fields limit (per provider))

Tip: (PRO only) If you want only one group of products to have extra fields, the administrator should create a new provider account and you should use that account to add extra field(s) to the product table and add new products.

Related topics:

Adding New Products

Importing Products

Exporting Products

Managing the Featured Products List

5.2.15   Selling EGoods (ESD products)

To sell electronically distributed goods you should enable **EGoods** module in the admin zone (through **Modules** in the Administration menu). If this module is enabled, 'ESD distribution' input line appears after the product name in the 'Product details' dialog when you modify a product. This line should be used to enter the path to the downloadable file (if the file is located on the same server as the online store) or the file URL (if the file is located on another server; not recommended).

Picture 1: *ESD distribution.*

In order to upload distributions to your site you should use **Files** item of the Inventory menu. When a customer orders an electronically distributed product, his order is processed and he receives a letter with a download key. If you are using manual processing the letter is sent to the customer when you set his order status to "Processed" (P).

 The download key is an URL which is used by the customer to download the file that he

purchased. It looks something like 'http://www.yoursite.com/xcart_directory/customer/download. php?id=920e98f7d889eb7781a'.

Download keys are generated automatically and are valid for a limited period of time. You can specify the time of key expiration by editing the field 'Download key TTL' in <u>General settings -> General options</u>.

Note on ESD files. When you upload ESD files via <u>Inventory menu</u> <u>-> Files</u> they are placed inside 'files' directory (in X-Cart Pro version the files are placed in 'files/provider_login' directory where the provider's login is the login of the provider who owns this ESD product). If the size of your ESD files is very large, it may be impossible to upload them via **Files** menu item (most web servers have 8Mb upload limitation), you can upload your files directly to 'files' directory (or to the appropriate provider's directory).

Security note. You should use web server functionality to disable direct download from the 'files' directory, otherwise any person will be able to get access to ESD files without purchasing them. If you are using Apache web server you can use .htaccess file with "Deny from all" directive in it. If you are using IIS, you should open 'Access permissions' dialog and disable reading from the 'files' directory.

5.3   Inventory

5.3.1   Summary Page (Provider)

Summary page provides general information about the current status of the online store. It can be used by the provider to control if all the necessary settings were defined and if everything works correctly. To access the Summary page in the provider zone, click on **Summary** in the Inventory menu.

Picture 1: Summary page.

Bold red font is used to display crucial information.

You can use the links on this page to quickly access the sections of your store where the corresponding settings can be changed.

5.3.2   Defining Destination Zones

With X-Cart shopping cart software you can easily setup various destination zones. Destination zones are zones to which your products can be sold and shipped. These zones affect shipping calculations and tax calculations (In earlier versions of X-Cart they used to be called 'Shipping/ Tax zones').

When you start setting up your destination zones, all the countries and states/provinces activated for your store by the admin belong to the default zone. You can divide the default zone into sub-zones and then define shipping and tax rates for each of them.

To add a zone:
1. Click on **Destination zones** in the Inventory menu, the 'Destination zones' form will appear.

Picture 1: Destination zones form.

If you are using X-Cart GOLD or X-Cart PRO with Single Mode enabled, this form displays all the destination zones specified for your store. If you are using an X-Cart PRO shop with Single Mode disabled, you see just the default zone and zones specified by yourself (you cannot see or edit the zones added by the other providers).

2. Click on **Add new**. The 'Zone details' form will appear.

Picture 2: Zone details form.

3. Enter a name for the destination zone you are going to add. Click on **Update**. The zone will be created.

4. Now the zone has a name, but it is empty. You need to add countries, states, cities, zip/postal codes and addresses to it. Use the expanded 'Zone details' form to do so.

Picture 3: Zone details form (Countries).

The 'Zone details' form is divided into 5 subsections: 'Countries', 'States', 'Cities', 'Zip/Postal codes' and 'Addresses'.

The 'Set' side of each of these subsections is meant to display locations pertaining to the destination zone you are editing. When you first start editing the details of a zone you created, the 'Set' side is empty. Your task is to move the locations pertaining to the zone being edited from the 'Unset' side to the 'Set' side. It means that if you want your zone to contain, for example, United Kingdom, you should select United Kingdom (Great Britain) from the list of countries in the 'Unset' column and click on the '**<<**' button. 'United Kingdom (Great Britain)' is supposed to appear in the 'Set' field. You can add more than one country at a time: hold Ctrl while clicking on the names of countries with your mouse to select multiple countries, then click on the '**<<**' button. All of the selected countries will be moved to the 'Set' side. The 'Quick select' feature allows you to quickly select countries by regions. If you click, for example, on the link 'North America', all North-American countries will be automatically selected in the 'Unset' list so you could move them to your zone. The '**>>**' button removes countries from the destination zone by moving them back from the 'Set' to the 'Unset' column.

After you have added countries to your destination zone, add states/provinces. The states/provinces you want to include into your zone also need to be moved to the 'Set' side of the 'States' subsection.

Picture 4: Zone details form (States).

Note. In earlier versions of X-Cart, countries that had states (e.g. USA) could not be added to a destination zone as a whole - providers had to add all the states of these countries separately. Now it is not the case. The moving of a country that has states to the 'Set' list of a destination zone can be performed with just two clicks. For example, you can select 'United States' from the 'Unset' column, click on '**<<**' - and be sure that all of its states are included into the zone. If, besides selecting 'United States' as a country, you select 'Alabama' in the 'States' subsection, your destination zone will include only one state of the USA: Alabama.

'Cities', 'Zip/Postal codes' and 'Addresses' subsections allow you to set up masks for smaller areas.

Picture 5: Zone details form (Cities).

Picture 6: Zone details form (Zip/Postal codes).

Zip/Postal codes

Set

Zip/Postal code mask examples:

Below is an example of zip/postal code masks definition:

2204%
38245
23%

Picture 7: Zone details form (Addresses).

Addresses

Set

Address mask examples:

Below is an example of address masks definition:

127 avenue
%Manhattan%

Save zone details

Note. '%' (percent) sign can substitute for any sequence of characters. '_' (underline) sign can stand for any single character.

5. Click on **Save zone details** to save the changes.

Note. If you need to create a zone that is much like another zone that you have already created, you can copy the existing zone using the 'Clone' feature and make this copy into a new zone.

To edit a zone:

1. Click on **Destination zones** in the Inventory menu, the 'Destination zones' form will appear.
2. Click on the name of the zone you would like to edit.
3. Use the 'Zone details' form to change the details of this zone. If necessary, you can rename the zone: edit the name in the 'Zone name' field and click on **Update**. You can also change the set of countries and states included into this zone, as well as the city, zip/postal code and address masks.
4. Click on **Save zone details** to save the changes.

To clone a zone:

1. Click on **Destination zones** in the Inventory menu, the 'Destination zones' form will appear.
2. Click on the name of the zone you would like to make a copy of.
3. In the 'Zone details' form click on the **Clone** button. A copy of the zone will be created (If the

name of the zone you cloned was 'new', the clone zone will be named 'new (clone)'.) The clone zone can now be renamed and edited.

To delete a zone:
1. Click on **Destination zones** in the Inventory menu, the 'Destination zones' form will appear.
2. Select the check box next to the name of the zone you would like to delete. You can use the **Check all / Uncheck all** links to select or unselect all the boxes.
3. Click on **Delete selected**.

Related topics:

[Defining](#) [Countries](#)

[Defining](#) [States and Counties](#)

[Defining](#) [Shipping Charges](#)

[Defining](#) [Tax Rates](#)

[Defining](#) [Shipping Methods](#)

5.3.3 Defining Shipping Charges

X-Cart shopping cart software allows you to define shipping rates for each [shipping method](#) and [destination zone](#) defined by the administrator of your store. This is done by setting up shipping rules in the 'Shipping charges' section. Each rule defines a shipping rate for a specific shipping situation (e.g. the shipping of an order the weight of which is between 10 and 15 lbs to the country located in zone 2 by UPS Ground should cost that much).

Note. Each of the shipping methods can be used more than once: you can make any method available for more than one zone, or set up different shipping rules for the same method within one zone.

If your shipping policy is complex you may need to define multiple shipping rules to cover all the cases.

Shipping charges in your store are calculated according to the formula:

`SHIPPING = Rate + TOTAL_WEIGHT*Weight_Rate + ITEMS*Item_Rate + SUM*Percent_Rate/100`

where:

- **SHIPPING** is Total shipping cost.

- **Rate** is Flat shipping charge.
  If you want the shipping charge to be a fixed value, enter the shipping charge amount into the "**Flat**" field.

- **Weight_Rate** is Shipping Charge Based on Product Weight.

  If you want shipping costs to be calculated based on the weight of the products ordered, enter the shipping charge amount into the "**Per lb.**" field. The value in the "**Per lb.**" field will be the flat shipping charge applied to each pound of the products ordered.

- **Item_Rate** is Shipping Charge Per Item.

  If you want shipping costs to be calculated based on the number of items (quantity) purchased, enter the amount into the "**Per item**" field. The value in the "**Per item**" field will be the flat shipping charge applied to each item of the products ordered.

- **Percent_Rate** is percent of the Total Amount Ordered.

  If you want the shipping charges to be calculated as a percentage of the total order amount, enter the shipping charge amount into "**%**" field.

- **TOTAL_WEIGHT** is the sum of weights of all the items in the shopping cart (variable).

  Product weight can be defined when you add a new product.

- **ITEMS** is the total number of items in the shopping cart (variable).

- **SUM** is the total order amount (variable).

To define shipping charges:

1. Click on **Shipping charges** in the Inventory menu, the 'Shipping charges' form will appear.
2. Scroll to the 'Add shipping charge values' section of the 'Shipping charges' form.

   Picture 1: *The Shipping charges form.*

3. Define the shipping rule:

- From the drop down list select the necessary shipping method.

- Select the destination zone for which the shipping method should be available (E. g.: If you use the same shipping method for shipping orders to Mexico and Australia, but the charges are different, put these countries into different shipping zones and create a shipping rule for each zone).

- Define the weight and order subtotal range the shipping rule should be applied to by entering the maximum weight and order subtotal values. If there are several rules for the same shipping method and zone, they are scanned by the program from the lowest to the highest value of the order subtotal/weight fields. The shipping rule will be applied to any values lower than the values specified in its order subtotal/weight fields, but higher than these values in the previous rule. E.g.: 4 rules for the order subtotal $10/$30/$50/$999999.00 are defined. If the order subtotal is $15, the second rule will be used, if $100 - the 4th rule will be used.

  Note. To define "unlimited" weight and order subtotal amount, enter a huge value like 999999.00 (set by default).

- Enter the appropriate values into the **Flat**, **%**, **Per item** and **Per lb.** fields (These values will be used in shipping charges calculations as described in the shipping formula above).
  Flat is the most commonly used option. It defines a fixed amount that will be charged if this rule is applied. (E.g. if the package weight is up to 10 lbs - the delivery costs $30)
  % - the delivery cost is calculated as a fixed percent of the order subtotal. It may be useful if you need insurance for the package depending on the package value.
  Per Item is a fixed amount charged for each item in the shopping cart.
  Per lb is a fixed amount charged for each lb of the order weight.
  The values in these fields can be combined.

4. Click on **Add**.

To modify shipping charges:

1. Click on **Shipping charges** in the Inventory menu.
2. Select the group of shipping methods the charges for which you need to modify. Select the shipping zone.

When the page is reloaded, only the shipping methods belonging to the specified group will be displayed.

3. Change the values that need to be modified (you can change the shipping method, the destination zone, the weight range or the total order amount range, the contents of the **Flat**, **%**, **Per item** and **Per lb.** fields)
4. Click on **Update**.

To delete shipping charges:

1. Click on **Shipping charges** in the Inventory menu.

2. Select the group of shipping methods to which the shipping charge you need to delete applies. Select the shipping zone. When the page is reloaded, only the shipping methods belonging to the specified group will be displayed.
3. Select the check boxes next to the shipping rule that needs to be deleted. You can use the **Check all / Uncheck all** links to select or unselect all the charges.
4. Click on **Delete selected**.

Related topics:

Defining Destination Zones

Defining Shipping Markups

Defining Shipping Methods

5.3.4   Defining Shipping Markups

The 'Shipping markups' section allows you to define markups for real-time calculated shipping methods. This can be useful when your shipping expenses exceed the value returned by the real-time shipping processor (e.g. you have to pay for packing, insurance, etc). The 'Shipping markups' section can be accessed by selecting **Shipping markups** in the Inventory menu.

Picture 1: *Shipping markups.*

The markups defined here will be added to the value returned by the real-time shipping calculation service.

If you define any markups, the shipping rates in your store will be calculated according to the formula:

SHIPPING = Rate + Markup + TOTAL_WEIGHT*Weight_Markup +

+ ITEMS*Item_Markup + SUM*Percent_Markup/100

Where:

- **Rate** is the shipping cost returned by the real-time calculation service (like UPS, FedEx, etc)

- **Markup** is a fixed markup amount applied to the order (the value of the "**Flat**" field).

- `Weight_Markup` is a shipping markup based on product weight (the value of the "**Per lb**" field).

- `Item_Markup` is a shipping markup applied per item of the products ordered (the value of the "**Per Item**" field).

- `Percent_Markup` is a shipping markup calculated as percent of the Total Amount Ordered (the value of the "**%**" field)

- `TOTAL_WEIGHT` is the sum of weights of all the items in the shopping cart (variable). Product weight can be defined when you add a new product.

- `ITEMS` is the total number of items in the shopping cart (variable).

- `SUM` is the total order amount (variable).

If a markup should be applied only to a certain weight and/or order subtotal range, specify this range using the corresponding fields.

Defining markups is similar to defining shipping charges.

Related topics:

Defining Shipping Charges

Defining Shipping Methods

5.3.5   Defining Discount Rates

You can activate purchase discounts for your store. Purchase discounts apply to all customer orders that include products in the details of which you selected the 'Apply global discounts' check box. Purchase discounts do not require your customers to enter any type of "code" to get the discount. They are normally used to provide automatic savings on every customer order that is over a certain amount.

Note. The system checks if a purchase discount needs to be calculated and applied to the order based on the order subtotal. The 'Order Subtotal' is the cost of all products included into the order before any discounts or sales tax are applied. If the Subtotal is greater than a certain

amount, the customer gets a purchase discount. If, besides a global purchase discount, a discount coupon is applied, the coupon savings amount is deducted from what remains of the subtotal after the application of the purchase discount.

To define a purchase discount:

1. Click on **Discounts** in the Inventory menu, the 'Edit purchase discounts' form will appear.
2. Enter the Order Subtotal for which you want to set a discount. Here the Order Subtotal is the cost of all products in cart before taxes and discounts are applied. For example, if you set the value in the Order Subtotal field to 1000.00, the discount will be applied when a customer orders a product or products for the sum of $1000.00 or over. The order total will be lowered automatically after the discount savings are applied.
3. Enter the discount value into the 'Discount' field.
4. Select the Discount type from the drop-down list (absolute or percent value). Absolute discount is a flat value expressed in the current monetary units. Percent value is how many percent of the order total the customer gets off.
5. Select the Membership group to which the discount should be applied.
6. Click on **Add/Update**.

To delete a discount, click on **Delete** next to the discount you want to be deleted.

Picture 1: Edit purchase discounts form

Note. After a discount has been added you can change its values and options. Click on **Add/Update** button after making all the necessary changes.

Related topics:

5.3.6   Defining Discount Coupons

You can define several kinds of discount coupons for your store. Coupons allow your customers to get a discount when their order meets certain requirements (e.g. when they order products for a sum over a certain amount, or when they order a certain product, or when they order a product that belongs to a discounted category). To get a coupon discount a customer has to know a valid coupon code which he should enter into the 'Discount coupon' form at the time of making his order. X-Cart shopping cart software identifies the coupon by the code and subtracts the coupon discount amount from the order subtotal or, if a global discount is applied, from the result of the subtraction of the global discount from the subtotal.

To define a new coupon:

1. Click on **Coupons** in the Inventory menu, the 'Store coupons' form will appear.

Picture 1: Add new coupon section of the Store coupons form .

2. Use the **Add new coupon** section of the 'Store coupons' form to specify the coupon details:

- **Coupon #** - The coupon code that your customer will be supposed to enter into the 'Discount coupon form' at the time of making his order.

- **Times to use** - The number in this field defines how many times the coupon code will be accepted by your store.
- **Status** - You can activate the coupon at the time of its creation or later. Your customers will be able to use the coupon only if its status is *Active*.
- **Discount** - Discount value (fixed or percent amount). If you choose *Free shipping* in the 'Coupon type' field, the value of the 'Discount' field will be ignored.
- **Coupon type** - Select *$ off* (fixed amount), *% off* (percent of the price) or *Free shipping*.
- **Expires** - defines the coupon expiration date.
- **Apply to** - defines what kind of orders the coupon should be applied to. Select one of the following:

a. orders, the subtotal of which equals the amount specified in the order subtotal field or is greater than this amount;
b. a selected product;
c. all the products of a selected category (if you want to include subcategories, select the appropriate check box).

3. Click on **Add coupon**.

To manage existing coupons:
1. Click on **Coupons** in the Inventory menu, the 'Store coupons' form will appear. All the coupons of the current provider will be displayed in the top area of the form.

Picture 2: Existing coupons (top of the Store coupons form).

2. Change the status of your coupon(s) where necessary (*Active* status means that your customers can use the coupon and get the discount. *Used* should be selected after the coupon has been used. *Disabled* is for expired coupons or coupons blocked for some other reason).
3. Click on **Update**.

To delete used or expired coupons, click on **Delete** next to the coupons you want to delete.

Related topics:

Defining Discount Rates

Setting Up Membership Levels

5.3.7 Defining Tax Rates

With X-Cart you can define tax rates for each of your destination zones and customer membership levels. In X-Cart PRO this can be done in the 'Tax rates' section accessible via **Tax rates** in the Inventory menu.

> **Note**. In X-Cart GOLD there is no **Tax rates** item in the Inventory menu, all tax related settings are under **Taxing system** menu item in the Management menu. Please refer to the 'Administrating your store' -> 'Management' -> 'Defining Taxes' -> 'Setting up the Taxing System in X-Cart GOLD' section of this manual for details.

In the 'Tax rates' section the 'Taxes' form shows all the taxes defined for your store by the store admin. Next to the names of taxes the number of rates defined for these taxes is shown in brackets. When you enter this section for the first time, this number is 0 - which means no rates are defined.

Picture 1: *Taxes form.*

You need to define rates for these taxes.

To define a tax rate:

1. In the 'Taxes' form click on the name of the tax you want to define rates for. The 'Tax details' section will be opened.

   Here you can see the details of this tax defined by the admin.

Picture 2: *Tax details.*

Note. Clicking on the **Taxes list** link can help you get back to the 'Taxes' form.

The 'Tax rates' form for the tax you are viewing allows you to define one or more rates for this tax.

Picture 3: *<Tax name>: Tax rates form (1).*

2. Scroll down to the 'Add tax rate' subsection of the '<Tax name>: Tax rates' form and complete it:

a. Enter the tax rate value into the 'Rate value' field. Use the selectbox next to it to define if this value is flat or percent.

b. Select the destination zone to which this rate will be applied.

c. Select the membership level to which this rate will be applied.

d. If necessary, define what the rate should be applied to (Use the tax [formula](#) [editor](#) to build a formula).

Picture 4: *<Tax name>: Tax rates form (2).*

e. Click on **Add**.

The new rate will be added to the list above.

Picture 5: <Tax name>: Tax rates form (3).

If you need to add more rates (for other destination zones or membership levels), repeat steps a-e.

To update a tax rate:
1. In the 'Taxes form' click on the name of the tax to which the rate you want to update refers. The 'Tax details' section will be opened.
2. In the '<Tax name>: Tax rates' form find the rate you want to update. Change the membership level, the rate value or the sphere of tax application (the rate value can be changed directly in the list of rates, membership level and 'apply tax to' values can be changed by clicking on the corresponding links in the rates list and selecting new values there).
3. Click on **Update**.

To delete a tax rate:
1. In the 'Taxes form' click on the name of the tax to which the rate you want to delete refers. The 'Tax details' section will be opened.
2. In the '<Tax name>: Tax rates' form find the rate you want to delete. Select the check box next to it. You can use the **Check all / Uncheck all** links to select or unselect all the boxes.
3. Click on **Delete selected**.

IMPORTANT! Taxes are assigned to products individually: the taxes that should be applied to a product must be selected in the 'Apply tax' field of its 'Product details' form. You can either go to the 'Product details' section of every product in your store and set up the 'Apply taxes' field, or - if a certain number of the products must be taxed the same way - use group editing of products and adjust taxes for the whole group of products simultaneously.

To assign the same taxes to a group of products:

1. Open for modification all the products which should be taxed the same: do product search, select the products you want to modify and click on **Modify selected**.
2. In the 'Product details' section of any of the products opened for modification select the check box next to the 'Apply taxes' field (That is done to make the value of this field common for all the products in the group being modified).
3. Select the taxes which should be applied to the products you are editing (To select more than one taxes, click on the names of these taxes with your mouse, holding down the 'Ctrl' key).
4. Click on **Save**.

Related topics:

Defining Destination Zones

Defining Taxes

5.3.8   Working With Files

You can use the X-Cart file manager to upload files to the server. All the files will be located in the folder *www.yourstore.com/xcartdir/*files/*yourloginname/.* Afterwards you can use these files in your store, for example if you sell DVD's you can upload a movie trailer into the file section, add an extra field to the product table and enter the link to the trailer in the extra field.

To create a new directory:

1. Click on **Files** in the Inventory menu, the 'Browse files' form will appear.

    Picture 1: *Browse files form.*

2. If you want to create a new sub-directory, click on the name of the directory in which you want the new sub-directory to be located.
3. Enter the name of the sub-directory you want to create in the 'New directory name' field.
4. Click on **Create**. The sub-directory will be created.

To create a copy of a file:

1. On the 'Browse files' form select the file you want to copy (for example, "Sample.jpg").
2. Enter the name of the file copy you want to create (for example, "Sample_copy.jpg") in the 'Copy file name' field.
3. Click on **Copy**. The copy will be created.

To delete a file or a directory:

1. Select the radio button of the file you are going to delete.
2. Click on **Delete selected**. The confirmation window will open.
3. Click on **OK** to confirm, or **Cancel** to cancel the deletion.

Note. When you delete a directory all the files and sub-directories under that directory are deleted.

To upload a file from the local computer:

1. Click on **Browse** on the 'Browse file' form, the 'Select file' window will appear.
2. Locate the file and click on **Open**.
3. Click on **Upload**.

Note. If a file with the same name already exists in the selected directory and you want it to be replaced by the file you are going to upload, select the 'Replace file if exists' check box.

Related topics:

[Editing](Templates) [Templates]

[Managing](Images Location) [Images Location]

5.4 Orders

5.4.1 Working with Orders

In the provider zone orders are managed using the 'Orders Management' section which can be accessed through 'Your orders' menu. Clicking on **New orders** allows you to view the orders placed recently. **Search for orders** opens the 'Search for orders' form and the 'Export orders' form.

Managing new orders

When you click on **New orders**, new orders are listed in the 'Search results' form.

Picture 1: *Search results.*

Please refer to the Search results subsection of 'Searching for orders' chapter in the 'Administrating Your Store (Admin)' section for information on search results usage.

Note. There are no **Update status** and **Delete selected** buttons in the orders 'Search results' form of the provider zone.

Searching for orders

See Searching for orders in the 'Administrating Your Store (Admin)' section of this manual for information on order search.

Exporting orders

See Exporting orders in the 'Exporting and Deleting orders' chapter of the 'Administrating Your Store (Admin)' section for information on exporting orders.

Note. Providers cannot delete orders.

Viewing and Modifying Order Details

See Viewing and Modifying Order Details in the 'Administrating Your Store (Admin)' section for information on order details management.

Note. Providers cannot change order status using the drop-down box. They can only click on **Complete order** to change the status to '*Complete*'.
'Order details' field containing private information pertaining to the order (like Credit Card info) is not visible in the provider zone.

Related topics:
X-Cart Gold and Pro

X-Cart Account Types
Searching for Orders
Exporting and Deleting Orders
Viewing and Modifying Order Details

Part

6

6 Administrating Your Store (Administrator)

6.1 Admin Home Page

When you log into admin zone the first thing you see is the 'Admin home' page. This page includes 'Quick menu', 'Orders info' section and 'Top sellers' section. You can quickly switch between these sections by clicking the corresponding links under the '**In this section:**' header of the section menu.

Picture 1: 'Admin home' section menu.
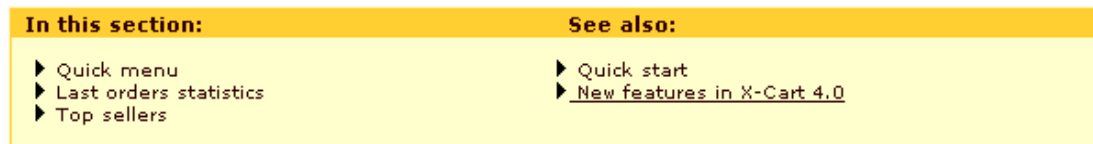
The so-called 'Quick menu' represents an alternative navigation method that you can use to quickly access the most important areas of administrator's interface. All you need to do is choose the target section from one of the five drop-down lists (Users/Orders Management, Products Management, Content Management, Store Configuration, Payment System Configuration).

Picture 2: Quick menu.
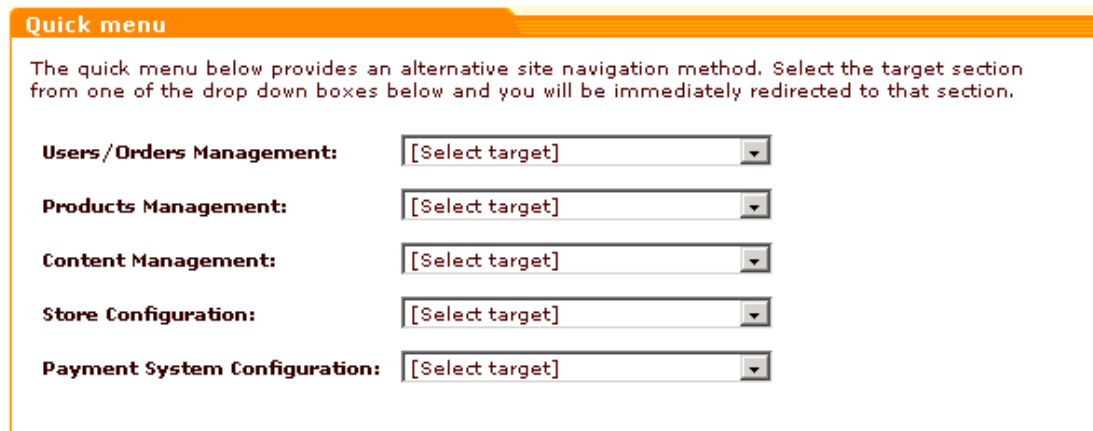
'Orders info' section displays information about the orders placed at your store recently. In this section all the orders are sorted by their status (*Processed*, *Failed/Declined*, *Not finished*, *Queued*). You can find out how many orders of each kind you got since your last log in, today, this week and this month. You can use the **Search for orders** link to go to the 'Orders Management' section and search for orders.

The 'Last order' subsection lists the details of the order placed the last. Clicking on the **Order details** link allows you to view and modify the details of the last order.

Picture 3: Orders info.

'Top sellers' section displays statistics on what products were purchased in your store the most often and what categories got the most views. Clicking on the product links you can view and modify the product details. Clicking on the categories links allows you to edit categories. You can click on the **Search for orders** link to access the 'Orders Management' section and search for the necessary orders.

Picture 4: *Top sellers.*

Clicking the 'Quick start' link under the '**See also:**' header of the section menu enables you to access the '[Quick start](#)' page of the admin zone. Clicking the 'New features in X-Cart 4.0' link displays some of the new features of X-Cart v. 4.0

Related topics:

[Admin Quick Start](#)

[Searching for Orders](#)

[Viewing and Modifying](#) [Order Details](#)

[Working with Products](#)

6.2   Admin Quick Start

This section walks you through the basic steps of building a store and provides brief step-by-step instructions on what should be done after X-Cart is installed. We did not mean it to be anything more than a quick overview, so please read X-Cart shopping cart software reference manual for more information on administrating X-Cart based online stores.

ENVIRONMENT

- Check your environment information (Summary section) and make sure all the necessary components are installed and the necessary directories have write permissions.
  See: Summary Page (Administrator)

USERS MANAGEMENT

- Modify your profile. Change the default username/password that you used to log into the administrative zone (Your profile menu ->Modify).

- Set up the membership levels to be used in your store (X-Cart has a few preset membership levels used to control access permissions for different groups of store users. If necessary, you can add custom levels or remove the preset membership levels you do not need).
  See: Setting up Membership Levels

- Change all default user account passwords. If needed, add more admin/provider accounts and assign them to appropriate membership levels.
  See: Managing User Profiles

- Set up User Profiles options: define what information should be included into the profile details form for different types of users.
  See: General Settings -> User Profiles Options

GENERAL SETTINGS

- Set up Company options: specify your company name, location (will be used for shipping rates calculation) and contact information; set up the e-mail addresses for notifications about new registered users, orders, etc.
  See: General Settings -> Company Options

- Set up General options to define the most general configuration of your store.
  See: General Settings -> General Options

MODULES

- Enable the modules you want to use in your store.
  See: Selecting Modules

- Set up Modules options and the options for the add-ons you installed and enabled (like Gift Registry, Fancy Categories, X-Affiliate etc)
  See: General Settings

SECURITY

- If you are going to use PGP or GnuPG encryption for e-mail notifications, set up PGP options or GnuPG options.
  See: General Settings -> PGP Options, General Settings -> GnuPG Options

- Set up Security options including Blowfish encryption, filter for the extensions of files that can be uploaded to the server, etc.

See: General Settings -> Security Options

COUNTRIES AND STATES SETTINGS

- Activate the countries to which your store is going to sell products, edit the additional countries features such as 'VAT taxable' flag.
  See: Defining Countries

- Edit the lists of states for the countries you made active: remove the states you do not need or add the states that are not listed currently.
  See: Defining States and Counties

SHIPPING SETTINGS

- Set up Shipping options: enable shipping (if you need shipping in your store), define additional shipping settings such as using real time processing for shipping rates calculation.
  See: General Settings -> Shipping Options

- Edit the list of shipping methods to be used in your store (enable/disable the pre-set shipping methods or add shipping methods of your own).
  See: Defining Shipping Methods

- Define real-time processors options (if you selected to use shipping rates real time processing).
  See: Setting up Real-Time Processors

TAXES SETTINGS

- Set up the taxing system for your store.
  See: Defining Taxes

PAYMENT SYSTEM SETTINGS

- Define payment methods that your customers will be able to use when making orders at your store. Set up the necessary payment gateways: credit card processors (if you are going to accept credit card payments), check processors (if you are going to use 'Pay by Check' payment method) and payment systems (like PayPal, NOCHEX, etc)
  See: Defining Payment Methods

- If you are going to allow your customers to use credit cards to pay for their orders, specify what credit card types you are going to accept.
  See: Editing Credit Card Types

LOOK AND FEEL SETTINGS

- Set up Appearance options to configure the look of your site (set the limit of products per page, define your products list style, etc).
  See: General Settings -> Appearance Options

- Edit templates (if needed), upload your logo and graphics, change the skin1.css file.
  See: Editing Templates

- Edit the Speed bar to improve navigation within the customer area of your store.
  See: Speed Bar

- Add Static pages that can be displayed as part of your store (e.g. sections 'About Us', 'FAQs', etc)
  See: Static Pages

LANGUAGES MANAGEMENT

- Edit the language labels values (such as labels, text, error messages, and email text).
  See: Working with Languages

- Use Webmaster mode to facilitate the language labels modifications (Webmaster mode allows you to make changes to the language labels stored in the database directly from the pages on which they appear).
  See: Webmaster mode

- If necessary, add or import a new language.
  See: Working with Languages

- Set up the default customer and admin language.
  See: Working with Languages

PRODUCTS MANAGEMENT

- Set up categories so your products could be classified for your customers' convenience.
  See: Setting up the Category Tree

- Create a list of manufacturers that will allow you to classify your products by the brand name.
  See: Managing Product Manufacturers

- Add products.
  See: Working with Products

- Create featured products lists that will be displayed within categories.
  See: Managing the Featured Products List

NEWS MANAGEMENT

- Create one or more news lists for your customers.
  See: Managing Your News

- Create news content (e.g. you could set up 'Site announcements' news list with the first news message about the launching of your site)
  See: Managing Your News

SEARCH ENGINE FRIENDLINESS

- Set up SEO options: enter the meta tags (keyword and description) that will be common for all the pages of your site, select the page title format, etc.
  See: General Settings -> SEO Options

• When your store is ready for launching generate an HTML catalog to increase the site rating in the search engines.
See: HTML Catalog

6.3 Management

6.3.1 Managing User Profiles

X-Cart shopping cart software enables you to manage user profiles of different account types. For more information see topic X-Cart Account Types.

Note. Multiple provider accounts without the function of shop administration are a specific feature of **X-Cart PRO** edition. In **X-Cart GOLD** the functions of managing products and orders and administering the shop are realized by the same person (provider, who in fact is administrator with access to provider privileges).

This chapter explains how to:

• create a new administrator, provider or partner profile

• find a user (administrator, provider, partner or customer)

• modify an administrator, provider, partner or customer profile

• delete an administrator, provider or customer profile

Creating a new administrator, provider or partner profile

1. Click on **Users** in the Management menu. 'Users Management' section will be opened.
2. Click on one of the links (**Create administrator profile**, **Create provider profile**, **Create customer profile** or **Create partner profile**) in the section menu depending on what kind of profile you would like to create. 'Profile details' form will appear.
3. Enter the user's personal information, billing and shipping addresses and contact information.
4. 'Signup for membership' box shows the membership level the user is signed up for. If necessary, sign up the user for a different membership level by selecting a different level from the 'Signup for membership' drop-down list.
5. Select the necessary membership level for the user from the 'Membership' drop-down list. The new level will be assigned to the user as soon as you fill out the form and click on **Save**.

• Administrator profile: If you choose the *Fulfillment staff* membership type, the created administrator will have access only to the statistics and orders.

• Provider profile: If you choose the *Root provider* membership, the created provider

will be able to view/delete/modify the products of the other providers.

- Customer profile: If you choose the *Premium* membership, the created customer will enjoy your special offers. If you choose the *Wholesale* membership level, the created customer will be able to purchase products at wholesale prices.

6. Enter the user name and password.
7. Select 'Require to change password on next log in' check box if you want the new member to be requested to change his password when he logs in next time (Recommended for security reasons).
8. Click on **Save** to add the new user.

Note. After creating a partner profile you need to approve the new partner using the 'Approve or decline partner profile' form.

Finding a user (administrator, provider, partner or customer):

You can search for users registered with your store. Once you have found a user, you can modify or suppress his account.

Basic search
1. Click on **Users** in the Management menu. The search form will appear:

    Picture 1: Basic search.

(If 'Users Management' section is already opened, you can click on **Search for users**

link in the section menu to open the search form).

2. In the provided search form specify the necessary search parameters:

- Enter your pattern into the 'Search for pattern' field. A pattern is a fragment of the username, first name, last name, e-mail or company by which the system will be able to identify the user.

- Specify where the system should search for this fragment by selecting 'Username', 'First Name', 'Last Name', 'E-Mail' and/or 'Company' check box(es).

- If you want the system just to list all the users in the store, skip step 2.

3. Click on **Search.** Search results will be displayed in the 'Search results' form.

Advanced search

'Advanced search options' section enables you to be more specific in setting the parameters for your search. To expand the 'Advanced search options' section, click on the "+" box or on the **Advanced search options** link.

Picture 2: *Advanced search.*

Advanced search options

Search for user type:	All ▼
Customer registration type: *	All ▼
Search by address:	⦿ Ignore address ○ Billing ○ Shipping ○ Both
City:	
State:	[Please select one] ▼
Country:	[Please select one] ▼
Zip/Postal code:	
Phone/Fax:	
Web site:	
Search for users that are:	☐ Registered ☐ Last logged in
During the period:	⦿ This month ○ This week ○ Today ○ Specify the period below
From:	May ▼ 24 ▼ 2004 ▼
Through:	May ▼ 24 ▼ 2004 ▼

Note: Customer registration type is required if you search for customer usertype only.

Search

It is not necessary to fill out all the fields in the 'Advanced search options' section. Specify only the parameters relevant to your search. The more information you will provide about the user, the more accurate the search results will be.

1. You can specify user type by selecting the appropriate type from the 'Search for user type' drop-down list:

   - *All* (users belonging to all user types will be found)

   - *Pending membership* (all users whose signup for membership and actual membership are different will be found)

   - *Administrator* (all administrators will be found)

     • *Pending membership* (all admins signed up for a different membership level will be found)

     • *Fulfillment staff* (all fulfillment staff administrators will be found)

   - *Provider* (all providers will be found)

     • *Pending membership* (all providers signed up for a different membership level will be found)

     • *Root provider* (all root providers will be found)

- *Customer* (all customers will be found)

- *Pending membership* (all customers signed up for a different membership level will be found)

- *Premium* (all customers with premium membership level will be found)

- *Wholesale* (all customers with wholesale membership level will be found)

- *Partner* (all partners will be found)

2. If you are searching for customer user type, select Customer registration type (*All*, *Anonymous*, *Registered*) from the drop-down list

3. In the 'Search by address' line select 'Billing', 'Shipping' or 'Both' if you want the user's address to be taken into consideration. Select 'Ignore address' if the address must be ignored.

> **Note**. Address fields are inactive if 'Ignore address' radio button is selected.

4. If you have chosen to search by address, enter the user's address into the appropriate fields: specify the city by typing its name into the 'City' field, select the state and the country from the 'State' and 'Country' drop-down lists, enter the Postal/Zip code.

5. If known, enter the user's Phone/Fax number and Web site address.

6. You can search for users who got registered or last logged in during a certain period. Select either 'Registered' or 'Last logged in', then specify the period (select 'This month', 'This week', 'Today' or 'Specify the period below' and set the dates)

7. Click on **Search**.

Search results

The search results are displayed in the 'Search results' form. For each found user you can see his username, name, e-mail address, user type, date and time of the last log in.

The search results may be sorted by clicking on the column headers (for example, if you want the results list to be sorted according to the order of the users' last log ins, click on the **LAST LOGGED IN** column header).

Clicking on the username or name link of a user allows you to modify his profile details.

If you want to delete a user or several users, select the check boxes next to their usernames in the 'Search results' form and click on **Delete selected**. Use the **Check all / Uncheck all** links to select or unselect all the boxes.

Clicking on the **Search again** link takes you back to the 'Search form' and enables you to start a new search.

You can request a change of password by the users of your store. If you need all the users found by your query to change their passwords, select 'Change of password on next log in should be required of all found users'. If only a few users will need to do so, select the users and choose 'Change of password on next log in should be required of selected users'. Click on **Apply**.

Page navigation

Paging is provided for more convenient navigation in cases when the list of results delivered by the search engine is too long. The number of users per page and the maximum number of navigation pages can be defined through the Administration menu of the admin zone (General

Settings>Appearance Options>Users per page (admin) and General Settings>Appearance Options>Maximum navigation pages).

Modifying an administrator, provider, partner or customer profile

Any user can modify his own profile information. The shop administrator can modify the profile information of any user, including his password and membership information. Only the administrator can set the membership option.
1. Find the user profile you want to modify.
2. In the 'Search results' form click on the username or name link of the user. The 'Profile details' form will be opened containing the user's personal information, billing/shipping addresses, contact information and username & password information.
3. Edit the profile information.

   'Signup for membership' box shows the membership level the user is currently signed up for. (For example, customers can sign up for a more privileged membership level through the 'Profile details' form at the time of registration or at any time when they choose to modify their profile. If a customer signs up for some membership level, it will not be granted to him automatically. First, the desired level will appear in the customer's 'Profile details' form for the administrator to see. The administrator then will decide if he should approve this customer for the new level or not). To grant a new level to a user, select this level from the 'Membership' drop-down box.
4. Click on **Save**.

Deleting an administrator, provider, partner or customer profile

Every user can delete his own profile. The administrator can delete any profile.

1. Find the user profile you want to suppress.
2. In the 'Search results' form select the check box next to this user account.
3. Click on **Delete selected**. You will be asked to confirm the deletion.
   Picture 4: Profile deletion confirmation.

4. Review the profile information carefully and make sure it is really the profile you would like to delete. The deletion cannot be reverted! Answer if you want to proceed:

- Click on **Yes** to delete the profile.

- Click on **No** to go back to the 'Search results'.

Related topics:

User Profiles Options

Setting Up Membership Levels

X-Cart Account Types

X-Cart Gold and Pro

6.3.2   Setting up the Category Tree

If your store sells numerous products, you will probably find it convenient to classify your products by product type, brand, etc and divide the store into several sections so the products of one type would be sold separately from the others. X-Cart software can help you organize your products into categories. It will surely be appreciated by your customers as categories will enable them to find products more easily. When a customer is using your store, the category tree is displayed on the side pane (the side depends on the type of layout used in your store). Categories can contain subcategories which, in their turn, may also contain nested subcategories.

Note. For each of your categories you can add the so-called featured products list. For more information please refer to the topic Managing the Featured Products List.

The store admin manages the categories using the 'Categories Management' section. It can be

accessed by clicking on **Categories** in the Management menu. When you enter the 'Categories Management' section for the first time, the 'Categories' form lists all the root-level categories in your store.

Picture 1: Categories form (Root level).

You can click on the name of a category to get a list of its subcategories.

Picture 2: Categories form ('Internet' and 'Software' subcategories inside the category 'Books').

The name of the current level in the category tree is displayed in the form above the categories list (For example, *Current category: "Books"*). You can use the navigation bar in the top area of the 'Categories' form to move between the levels of your category tree.

For your convenience the categories in the list are sorted alphabetically. The **POS.** column shows the order in which the categories are displayed on the storefront in the customer zone. **PRODUCTS** column shows the number of products located in the category outside of its subcategories (including featured products). **ENABLED** column demonstrates the status of the categories (enabled or disabled).

The buttons **Modify**, **Products** and **Delete** below the name of the current category pertain to the current category. For example, if we've looked into the category 'Books' (Picture 2), clicking on **Modify** enables us to edit the settings of the category 'Books'; clicking on **Products** enables us to see if there are any products stored in the category 'Books' outside its subcategories 'Internet' and 'Software'; clicking on **Delete** removes the whole category 'Books' (including all its subcategories and products).

The buttons below the list of categories (**Update**, **Modify selected**, **Delete selected**, **Add new**) pertain to the list of categories.

Update is used to update the position numbers and statuses of the categories in the list: just change the values in the **POS**. and **ENABLED** fields and click on **Update**.

Modify selected allows you to modify the category, the radio button of which is selected.

Delete selected allows you to delete the category, the radio button of which is selected.

Add new allows you to add a new category to the list.

To add a new category/subcategory:
1. Click on **Categories** in the Management menu. 'Categories Management' section will be opened. The list of all root level categories will be displayed in the 'Categories' form.

2. If you want to add a category on the current (root) level, click on the **Add new** button in the 'Categories' form.

> If you want to add a subcategory, go to the location where it should be created. Clicking on the name of a category opens the list of its subcategories. As soon as you reach the desired level, click on the **Add new** button.
>
> This will open the 'Add category' form where you will be able to set the parameters of the new category/subcategory.

Picture 3: *Add category form.*

3. Fancy Categories module allows you to have icons for categories. When you start creating a new category, in the 'Add category' form X-Cart shows the default image ("No Image Available") where the category icon should be displayed. If you do not want to use any icon for the new category, you can leave everything as it is. The default image will not be displayed in the customer zone, the category just will not have any icon. However, if you want to use an icon for the category, you should replace the default image by a picture of

your own. Click on **Change icon**. 'Image selection' window will appear. Select the necessary image file (from the server, your local computer or the Internet) and click on **Apply**. The new icon will appear in the 'Add category' form. If you do not like the result, you can change the icon again or delete it completely. To delete the icon click on **Delete icon**.

> **Note**. Recommended size for a category icon is 30x30 to 50x50 pixels, GIF or JPG graphical formats are supported.

4. Enter the category position number.

     For example, if you want the category to be displayed on the storefront between the categories *Electronics* (40) and *Games and toys* (50) shown in Picture 1, you should enter any number between 40 and 50.

5. Enter the category name.
6. If needed, enter the category description. It will appear on the storefront helping your customers understand what kind of products are offered in the category.
7. Use the drop-down list to select the membership level for which the category will be available. For example, if you select *Wholesale*, only wholesale members will be able to purchase products from this category (the category will be concealed from the users of all other membership levels).
8. Select the availability of the category. If a category is disabled it will not be shown in the category tree.
9. Optionally you can enter META keywords and META description. This will get your pages to rank higher in the search engines' listings.
10. Click on **Save**.

To modify a category/subcategory:

1. Click on **Categories** in the Management menu. 'Categories Management' section will be opened. The list of all root level categories will be displayed in the 'Categories management' form.
2. Find the category/subcategory you want to modify and select the radio button next to it.
3. Click on **Modify selected.** The 'Modify category' form will appear.

     Picture 4: *'Modify category' form.*

4. Edit the category details.

5. Click on **Save** to save the changes.

If you need to move the category to another location, refer to the 'Category location' subsection of the 'Modify category' form. Use the drop-down box to select the location to which you want the category to be moved. Click on **Update**.

You can have international descriptions for your categories. To create a description in another language use the 'International descriptions' form: choose a language, enter a category name and a description and click on **Submit**.

Picture 5: *'International descriptions' form.*

To delete a category/subcategory:

1. Click on **Categories** in the Management menu. 'Categories Management' section will be opened. The list of all root level categories will be displayed in the 'Categories' form.
2. Find the category/subcategory you want to delete and select the radio button next to it.
3. Click on **Delete selected**. You will be asked to confirm the deletion.

   Picture 6: Category deletion confirmation.

4. Make sure the category being deleted is the one you really want to delete. The deletion cannot be reverted! Answer if you want to proceed:

   • Click on **Yes** to delete the category.

   • Click on **No** to go back to the 'Categories' form.

Related topics:

Managing the Featured Products List

Adding New Products

6.3.3   Managing the Featured Products List

Admin can add featured products to the Customer front page and to all category and

subcategory pages. Featured products list will be shown to the customers as they browse categories and subcategories.

To add featured products to a category:

1. Click on **Categories** in the Management menu. 'Categories Management' section will be opened.
2. In the 'Categories management' form browse to the location where you want your featured products to be displayed. (Click on the name of a category to get a list of its subcategories. The name of the current category will be displayed above the categories list in the 'Categories management' form. You can use the navigation bar at the top of the 'Categories management' form to move between the levels of your category tree).
3. Scroll down to the 'Featured products' form.

Picture 1: Featured products form.

4. Click on **Browse**, the 'Select product' window will appear.
5. Select a category and click on **Show products**. All the products of the selected category will be listed on the right.
6. Choose a product from the list and click on **Select**. (You can bookmark several products to add them later).
7. If necessary, enter the position number for the new featured product. If you leave the position field blank, X-Cart will place the new product in the end of the featured products list.
8. Unselect the 'Active' check box next to the product being added if you do not want the new product to appear in the featured products list on the storefront immediately. It will be disabled.
9. Click on **Add new**.

10.Repeat steps 4-10 to add more featured products.

If you want to remove a featured product, select the check box next to the product you want to be removed from the featured products list and click on **Delete selected**. Use **Check all** / **Uncheck all** links to select or unselect all the products.

If you want to disable a featured product temporarily, unselect the corresponding check box in the **ACTIVE** column and click on **Update**.

If you want to change the order in which the products should be displayed in the list, enter the new position numbers and click on **Update**.

Note. If you delete or temporarily disable a product in the featured products list, it will not be deleted or disabled in its main and additional categories and customers will still be able to order it.
If the main category of a product from the featured products list is disabled, the product is still displayed in the featured products list and customers can view its details page by clicking on the 'See details' link.

Related topics:

Setting Up the Category Tree

6.3.4   Managing Product Manufacturers

Some customers may prefer to find products by the manufacturer. X-Cart shopping cart software allows you to create manufacturers and assign products to them. Products sorted by the manufacturers can be seen by your customers through the Manufacturers menu in the customer zone.

Both administrators and providers have the ability to create manufacturers and assign products to them.

Note. You can find information on assigning products to a manufacturer in the topic 'Defining the Product Manufacturer' in the 'Managing Products and Orders (Provider)' section.

Only administrators can activate manufacturers and set up their order in the manufacturers list. Thus, when a new manufacturer is created by a provider, the administrator needs to specify its position number and activate it. New manufacturers do not appear on the storefront until they are activated.

Adding manufacturers
1. Click on **Manufacturers** in the Management menu. The 'Manufacturers list' will appear.

   Picture 1: Manufacturers list.

2. Click on **Add new**. 'Manufacturer details' form will be opened.

Picture 2: Manufacturer details form.

3. Enter the title for the new manufacturer in the appropriate field.
4. Use **Browse** to locate the manufacturer's logo and select it for the manufacturer.
5. Enter the description.
6. Enter the URL of the manufacturer's site.
7. Enter the position number.
8. Select the 'Availability' check box to make the manufacturer active.
9. Click on **Save**.

You can use the **Add Manufacturer** link to add more manufacturers to the list.

Modifying the details of a manufacturer

1. Open the 'Manufacturers list'.

2. Click on the manufacturer you want to modify.
3. Change the necessary details.
4. Click on **Save**.

Administrators can modify any manufacturers in the store. Providers can modify only the manufacturers they created themselves.

Note. If products of more than one provider are assigned to a manufacturer, the provider who created this manufacturer will not be able to rename it.

Updating the manufacturers list
1. Open the 'Manufacturers list'.
2. If necessary, change the position number of one or more manufacturers.
3. Select the check boxes in the 'Active' column for the manufacturers you want to be displayed on the storefront. Unselect the check boxes for the manufacturers you want to be temporarily disabled.
4. Click on **Update**.

Deleting manufacturers
1. Open the 'Manufacturers list'.
2. Select the check boxes next to the manufacturers you want to delete.
3. Click on **Delete selected**.

Administrators can delete any manufacturers in the store. Providers can delete only the manufacturers they created themselves.

Note. If products of more than one provider are assigned to a manufacturer, the provider who created this manufacturer will not be able to delete it.

Related topics:

Advanced Product Management

6.3.5   Working with Products

Note. X-Cart store administrator uses **Products** in the Management menu to access the Products Management section.

Please refer to the following topics in the 'Managing Products and Orders (Provider)' section of this manual for more information on product management:

Adding New Products

Searching for Products

Updating Products' Quantity and Price

Previewing Product Details

6.3.6 Searching for Orders

You can search for your customers' orders using the built-in search engine. You can list all your orders or filter orders by certain criteria. X-Cart provides two types of search: basic and advanced. Basic search allows you to search for orders by the date/period when they were placed. Advanced search allows you to specify additional search parameters so the search results will be more accurate. Once you have found an order, you can view or modify its details, add notes, update order status, print invoice and label, delete the order or export it in the selected format (CSV or QuickBooks).

Note. If you are using X-Cart PRO edition, each of the providers can search and list only the orders with his own products. The administrator can view payment details and orders of all the providers.

Basic search
1. Click on **Orders** in the Management menu. The search form will appear:
   Picture 1: Basic search.

2. In the provided search form specify the period when the order being searched for was placed. Select one of the following:

      • 'All dates'

- 'This month'

- 'This week'

- 'Today'

- 'Specify period below' (if this item is selected, you will have to specify the first and last days of the period in the fields below)

3. Click on **Search.** Search results will be displayed in the 'Search results' form.

Advanced search

'Advanced search options' section enables you to be more specific in setting the parameters for your search. To expand the 'Advanced search options' section, click on the "+" box or on the **Advanced search options** link.

Picture 2: Advanced search.

It is not necessary to fill out all the fields in the 'Advanced search options' section. Specify only the parameters relevant to your search. The more information you will provide about the order,

the more accurate the search results will be. You can:

1. Specify the necessary **Order id** range by entering the initial and the final order id's. If you enter just one of the id's, the search results will include all your orders with id's beginning with the initial one or with id's up to the final one.

2. Search for orders by **Order total** (enter the desired range into the fields provided)

3. If needed, choose the used **Payment method** and method of **Delivery**.

4. Specify the status of your order (**Order status**): select *Not finished*, *Queued*, *Processed*, *Backordered*, *Declined*, *Failed* or *Complete*.

> **Note**. *Not finished (I)*, *Failed (F)* and *Queued (Q)* are the statuses that can be automatically assigned to orders by X-Cart.
>
> The status *Not finished* signifies that X-Cart is unable to define the status otherwise because the customer went to conduct the transaction using an online payment processor but for some reason did not return (the transaction is neither successful nor failed yet).
>
> *Failed* is assigned to an order if the transaction cannot be processed.
>
> The status *Queued* is assigned to an order waiting to be processed by the admin (when a customer pays by an offline payment method - like credit card, check or phone ordering - the admin needs to provide assistance for the order to be processed and then change the order status to *Processed (P)* after the payment is received).
>
> *Processed* can be assigned either manually or automatically, it means that the payment was received by the shop.
>
> *Complete (C)* is the status that can be assigned to an order by the provider when all the work concerning the order is done: the money is received and the products are sent to the customer.
>
> *Backordered (B)* status is assigned by the shop admin if an order is returned and the customer gets his money back.
>
> *Declined (D)* is another status that can be assigned by admin - it is usually used when an order was processed but then it turned out that, for example, the credit card information provided by the customer was incorrect. *Declined* is a manually assigned equivalent of *Failed*.

5. From the list of **Order features** select the features pertaining to your order. Press and hold 'Ctrl' key while clicking with your mouse to select multiple features.

6. Include information about the ordered products:

   - Enter the **pattern** by which the order can be identified.

   - Specify where this pattern should be searched for (**Search in**: **Title** or **Options**).

   - Enter the product **SKU** or **Product id #**.

   - Enter the **Price** range.

7. Include information about the customer:

- In the field **Customer** enter the customer's username.

- In the **Search by address** line select **Billing**, **Shipping** or **Both** if you want the customer's address to be taken into consideration. Select **Ignore address** if the address must be ignored.

   Note. Address fields are inactive if **Ignore address** radio button is selected.

- If you have chosen to search by address, enter the customer's address into the appropriate fields: type in the name of the **City**, select the **State** and the **Country** from the drop-down lists, enter the **Postal/Zip code**.

- If known, enter the customer's **Phone/Fax** number.

- Enter the customer's **E-mail** address.

8. Click on **Search**.

Search results

The search results are displayed in the 'Search results' form. For each of the found orders you can see its order id #, status, customer's name and username, date and total.

Picture 3: Search results.

The search results may be sorted by clicking on the column headers (for example, if you want the results list to be sorted by the date, click on the **DATE** column header).

Clicking on the order id number link allows you to view and modify the order details.

You can quickly update the status of the orders in the 'Search results' form by selecting the necessary status from the drop-down list and clicking on the **Update status** button.

You can print invoices and labels for selected orders: select the necessary check boxes and click on **Invoices for selected** or on **Labels for selected**.

You can delete selected orders: select the necessary check boxes and click on **Delete selected**. You will be asked to confirm the deletion.

Picture 4: Order deletion confirmation.

Review the order information carefully and make sure it is really the order you would like to delete. The deletion cannot be reverted! Answer if you want to proceed:

- Click on **Yes** to delete the order.

- Click on **No** to go back to the 'Search results'.

You can export selected orders: select the necessary check boxes, select the file format from the drop-down box and click on **Export selected**. If you want to export all the orders found by this query, click on **Export all found**.

Use the **Check all / Uncheck all** links to select or unselect all the boxes.

Clicking the **Search again** link takes you back to the 'Search for orders' form and enables you to start a new search.

Page navigation

Paging is provided for more convenient navigation in cases when the list of results delivered by the search engine is too long. The number of orders per page and the maximum number of navigation pages can be defined through the Administration menu of the admin zone (General Settings>Appearance Options>Orders per page (admin) and General Settings>Appearance Options>Maximum navigation pages).

Related topics:

Exporting and Deleting Orders

6.3.7 Exporting and Deleting Orders

Exporting orders

X-Cart allows you to export orders. This can be done through the 'Export/Delete orders' form in the 'Orders Management' section.

Picture 1: Export/Delete orders form.

To export all the orders in your store:
1. Select the desired file format from the drop-down list:

   • CSV with tab/semicolon/comma delimiter *or*

   • IIF (QuickBooks 2002, 2003)
2. Click on **Export all**.

Deleting orders

You can delete orders through the 'Export/Delete orders' form in the 'Orders Management' section.

To delete all the orders in your store click on **Delete All Orders**.

Related topics:

6.3.8 Viewing and Modifying Order Details

To view the details of an order, search for the order and click on its Order id # in the 'Search

results' form. 'Order details' section will be opened.

Picture 1: Order details section (part 1).


```
Order details

Order #1008
Date: 13-05-2004 09:14:47

<< Order #1007

Print invoice  Go      Modify  Go

Product info

Ericsson T28 Li-Ion Battery #17502

SKU                        SKU17502
Provider                   provider
Price                      $ 23.00
Quantity                   1 item(s)

Order info

Payment method             Credit Card (manual processing)
Delivery
Subtotal                   $ 23.00
Discount                   $ 0.00
Coupon saving              $ 0.00 ()
Shipping cost              $ 0.00
Tax cost                   $ 0.00
TOTAL                      $ 23.00

Customer's info

Personal information:
  Title                    Ms.
  First Name               Jill
  Last Name                Backer
  Company
Billing Address:
  First Name               Jill
  Last Name                Backer
  Address                  test
```

Here you can find the Order #, date and time when the order was placed. Then, there are back and forward links allowing you to view the details of the orders preceding and following the order displayed.

If you need to print the invoice, click on the **Print invoice** button. If X-AOM module is enabled, there is also the **Modify** button clicking on which allows you to modify all the order details.

Below you can see 'Product info', 'Order info' and 'Customer info' sections.

Next, you can view and edit the order status, tracking number, order details (not visible to customer and provider) and customer notes (not visible to customer). Tracking number is assigned manually by the administrator or provider so the shipment could be tracked while being delivered by FedEx, UPS and USPS.

Picture 2: Order details section (part 2).

If you change any details in the 'Order details' form, click on **Apply changes** to save the new details. After you click on this button, the information will be updated and the following confirmation will appear:

Picture 3: Confirmation message.

Go Back takes you back to the 'Order details' section with the updated information.

Related topics:

Searching for Orders

Exporting and Deleting Orders

6.3.9   Antifraud module

Antifraud is a module that can help you lower the risk of fraudulent payments being made at your store. The basic idea is that Antifraud service checks up whether the billing address

provided by a customer in his order corresponds to the location of the IP address of the computer this customer used to place the order at your online store. Based on the results of this check-up a value called *Fraud risk factor* is produced that allows the system to evaluate the risk of fraud and to place a note about it into order details. Normally, Fraud risk factor is a number from 1 to 10 (the greater the number, the higher the probability of fraud from this IP address). You can define how great Fraud risk factor should be for an order to be evaluated as fraudulent. To do so, you need to set the so-called *Fraud risk factor threshold value*. For example, if you set the Fraud risk factor threshold value to 5 (which corresponds to 50% fraud), all the orders placed at your store with Fraud risk factor rates from 6 to 10 will not be processed automatically - instead, they will get the status 'Queued' and will be put off for manual processing, so you will be able to decide wether you want to process them or not. During manual order processing you will be able to see the order details and Antifraud checking results. Then, if you agree with Antifraud service that the order is fraudulent, you can report the IP address from which the order originated to the Antifraud service server as a source of fraudulent orders. This will help to avoid further fraudulent orders coming from this IP.

If you would like to use Antifraud module, activate it in the 'Modules' section of the admin zone (can be accessed by clicking on **Modules** in the Administration menu).

Please note that Antifraud is a subscription service, which means that it is not enough just to activate the module: you need Antifraud module subscription key to make it work. So be sure to enter your Antifraud module subscription key into the corresponding field on the General settings -> Modules options page of the admin zone and click on **Save** to activate the key.

Picture 1: Antifraud options on the 'General settings -> Modules options' page.

Note. Antifraud module subscription key can be obtained via the 'Purchase services' page in your Personal HelpDesk at https://secure.qualiteam.biz.

You can set the 'Antifraud safe distance (km)' (General settings -> Modules options) within which you trust all your prospective customers. If the address provided by your customer on checkout is within this distance from the location of the customer's IP, the order will be processed as non-fraudulent.

For the users outside the safe distance Fraud risk factor functions. If it is greater than the limit specified in the 'Fraud risk factor threshold value (Antifraud module)' field (General settings -> Modules options), 'Queued' status will be assigned to the order, which you will have to process manually.

It would be a good idea to specify the so-called 'Order total threshold'. This value is also used by Antifraud service for fraud risk evaluation. In fact, it is a subtotal amount beginning from which an order is considered 'large'. Large orders are a greater risk for a store, so if the subtotal of an order exceeds the value provided in this field, Antifraud server uses an additional coefficient to increase the fraud risk factor of the order.

The results of checking an order by Antifraud service can be found in the 'Antifraud checking result' subsection of the 'Order details' form.

If Antifraud module is turned on at the time of placing the order, the 'Antifraud checking result' section most probably includes:

- *Fraud risk factor* of the order (a number from 1 to 10),

- *Total requests* (the total number of requests to Antifraud service you are allowed to make with your subscription key),

- *Used requests* (the number showing how many requests to Antifraud have already been made).

Sometimes the result returned by Antifraud may include service flags.

Picture 2: Antifraud checking result.

Antifraud checking result

```
Fraud risk factor: 10
Total requests:   100
Used requests:    61
Antifraud additional fields:
   check_error: IP_NOT_FOUND
```

Check order in Antifraud service `Go`

If Antifraud service is unable to provide any information about the IP address used to place the order, you are informed about it by a message of the following contents:

Picture 3: 'No information regarding requested IP is found' message.

Antifraud checking result

No information regarding requested IP is found

Check order in Antifraud service `Go`

Such a message does not necessarily mean fraud, it can be caused by the fact that the

customer came to your store from an intranet environment. However, the potential fraud risk of orders, the origin of which is unknown, is very high.

If Antifraud module is turned off when the order gets placed, the order is not checked and the 'Antifraud checking result' section of the order details page displays a warning about it.

Picture 4: 'Order has not been checked' warning.

If, for some reason, the order was not checked by Antifraud, or if you failed to get the check results (for example, because of a connection failure just after the order was placed), you can request another check of the order by Antifraud: just click the **Check order in Antifraud service** link and your request will be re-sent to Antifraud server. (If the **Check order in Antifraud service** link does not appear on the page, please make sure Antifraud module is enabled and Antifraud module subscription key is entered on the General settings/Modules options page).

You can also use the IP lookup service. The IP section of the order details page displays the IP address from which the order originated.

Picture 5: IP lookup button.

Clicking on the **Lookup** button opens a new window containing the 'Lookup address' dialog that allows you to find out more information about the IP address of your customer.
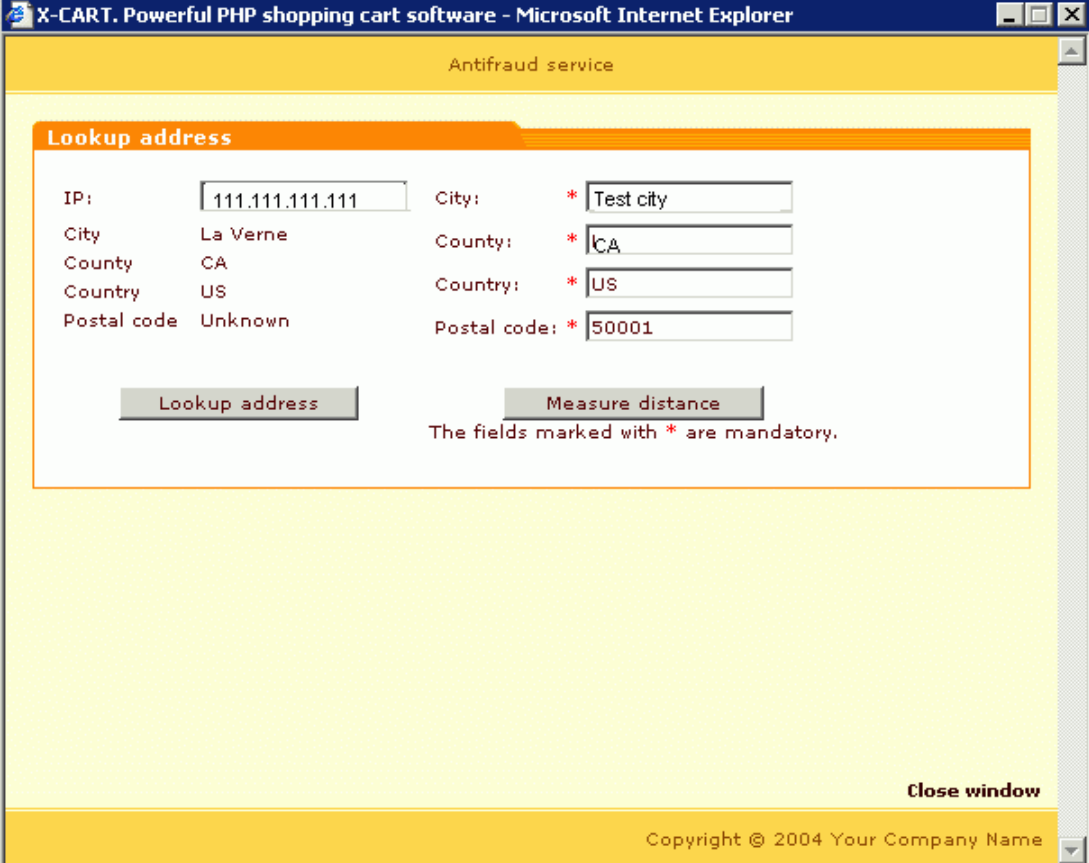
Picture 6: Lookup address dialog.
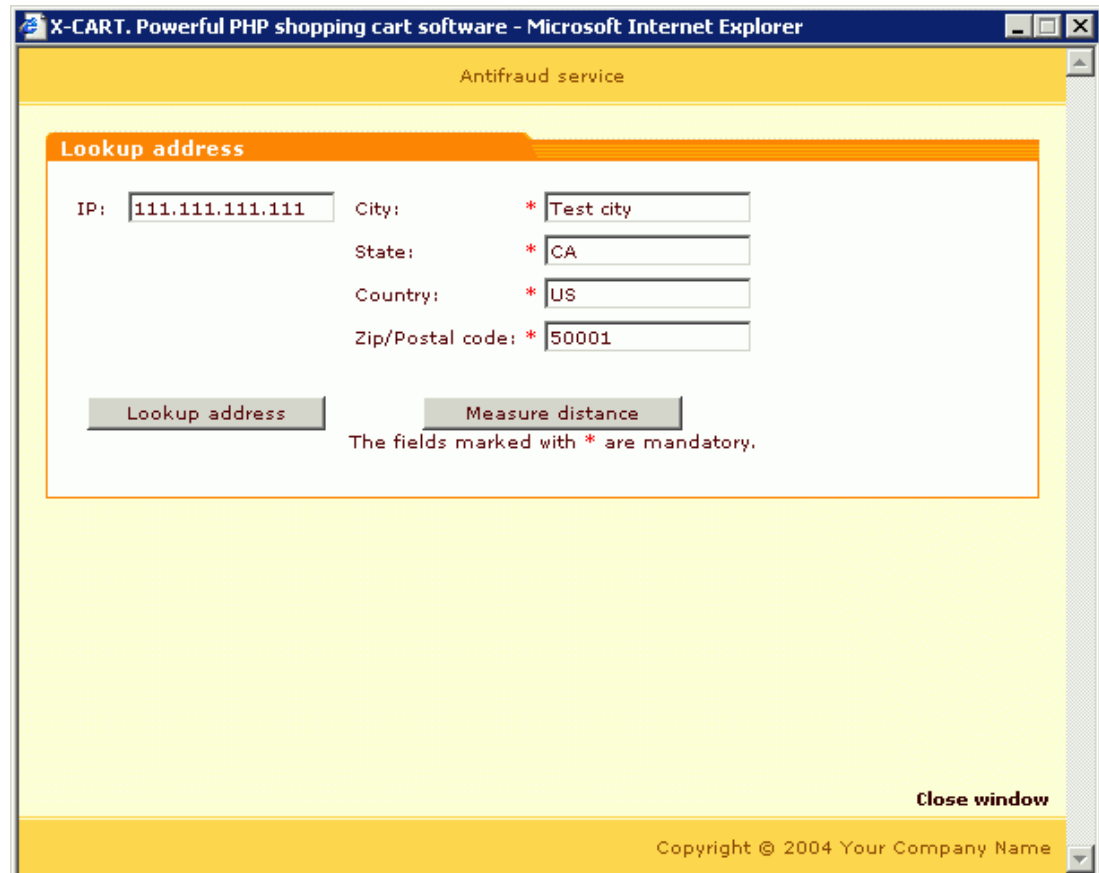
The 'City', 'State', 'Country' and 'Zip/Postal code' fields in the 'Lookup address' dialog show you the company address set under General settings/Company options. If necessary, you can enter a different address into these fields (for example, the address provided by the customer as his billing address).

The 'IP' field shows the IP address of your customer. Clicking on the **Lookup address** button allows you to get Antifraud service to find out the factual location of this IP address. The customer's address received from Antifraud service appears below the 'IP' field.

Picture 7: IP address location has been found out.

Clicking on **Measure distance** allows you to get information about the distance between the location of the IP address of your customer and your company address (or any other known address, specified in the right side of the form).

Picture 8: *Distance between the IP address location and your company address has been measured.*
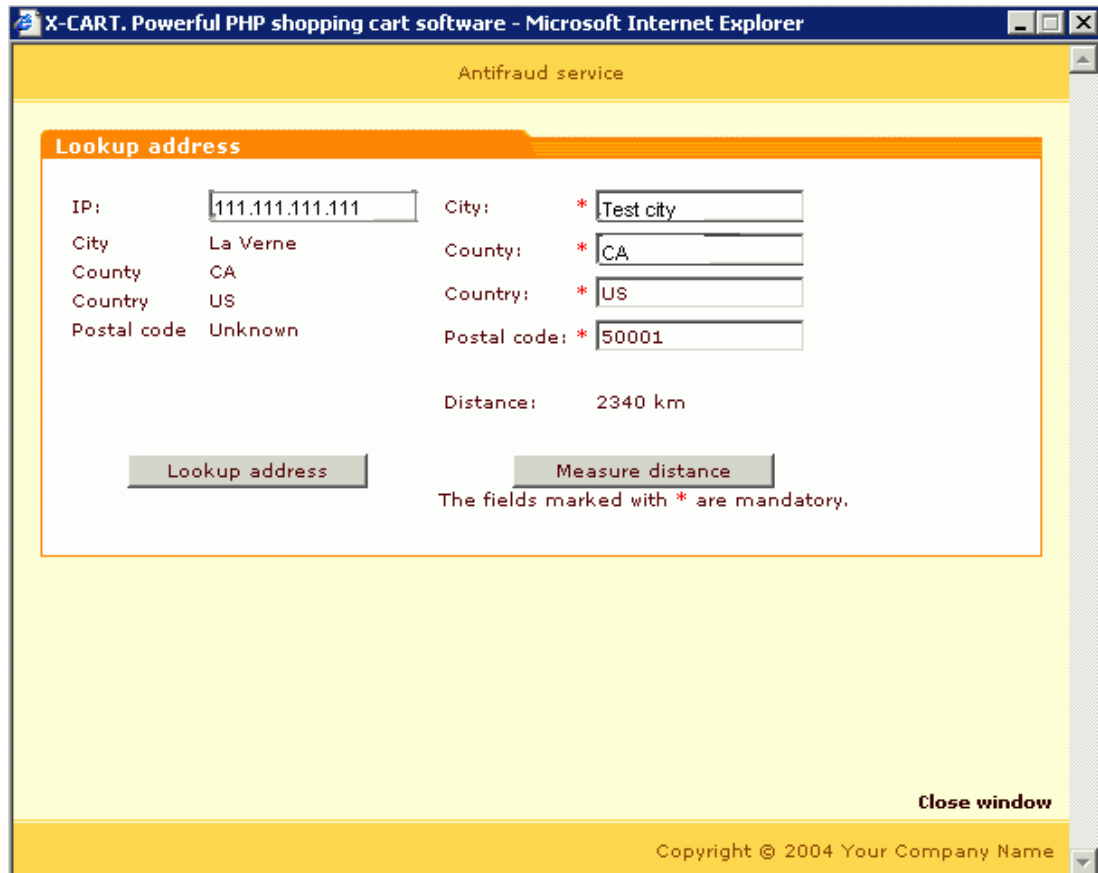
If you are sure that the IP address from which the order originated was used by a fraudster, you can report this IP to Antifraud service. Use the 'Send IP' subsection of the order details page to describe the reason why you believe this IP to be a source of fraudulent orders using the provided field, then click on **Send**.

Picture 9: 'Send IP' subsection of the order details page.

Antifraud service subscription key is valid for a limited number of times. You will receive an e-mail notification when your service key is invalid or expired. You will also see a warning message in the 'Antifraud checking results' subsection of the 'Order details' form.

Picture 3: 'Antifraud service key expired' warning.

Antifraud checking result

Warning! Antifraud service key expired!
You can purchase Antifraud Service subscription <u>here</u> or get your free trial key <u>here</u> (if it has not been used).

Check order in Antifraud service (Go)

Picture 4: 'Antifraud service key is invalid' warning.

Antifraud checking result

Warning! Antifraud service key is invalid!
You can purchase Antifraud Service subscription <u>here</u> or get your free trial key <u>here</u> (if it has not been used).

Check order in Antifraud service (Go)

If you see one of these warning messages, it is time to order a new Antifraud service subscription key.

Related topics:

[Selecting](#) [Modules](#)

[Modules](#) [Options](#)

[Managing](#) [the Stop List](#)

6.3.10   Viewing Statistics

X-Cart shopping cart software gathers statistical data on the various aspects of the store operation. The statistical data can be used by the store admin to evaluate the overall efficiency of the store.

Note. Advanced Statistics module can be enabled in [Administration](#) [menu -> Modules](#). Tracking statistics can be enabled in [Administration](#) [menu -> General settings -> General options](#).

Statistics section can be accessed by clicking on **Statistics** in the Management menu.

First, you need to select from the section menu what kind of statistics you would like to view:

- [General statistics](#)
- [Shop statistics](#) (is only available if Advanced Statistics module is enabled)
- [Top paths through site](#)
- [Top pages views](#)
- [Shopping cart conversion funnel](#)
- [Log in history](#)
- [Visitors environment statistics](#)
- [Users online](#) (is only available if Users online module is enabled)
- [Search statistics](#)

Then you need to set the time period during which the statistics was gathered.

Picture 1: *Date setting.*

Note. The store admin can clear the statistical data he no longer needs using the [Summary](#) [page](#).

General Statistics

General statistics provides information on how many customers, providers, products, root categories, subcategories and orders there are in your store and how many customers, providers, products and orders appeared during the period specified in the 'Date setting' form.

Picture 2: *Total statistics.*

Shop Statistics

'Shop statistics' page is only viewable if Advanced Statistics module is enabled. It allows you to find out statistics on category views, product views, product sales, products removed by customers from the shopping cart and referer statistics.

'Category views' section provides information on what categories in your store were viewed the most often during the period specified in the 'Date setting' form. On the left you see the names of categories, on the right there's a graph showing the number of category views.

Picture 3: Category views (Root level categories).

By clicking on the names of categories you can view statistics on subcategories and products. Click on the name of a category to get a list of its subcategories. You can always find out which level of the category tree you are at and move between the levels of your category tree using the navigation bar at the top of the 'Category views' section.

Picture 4: Category views (Subcategories of 'Books' category).
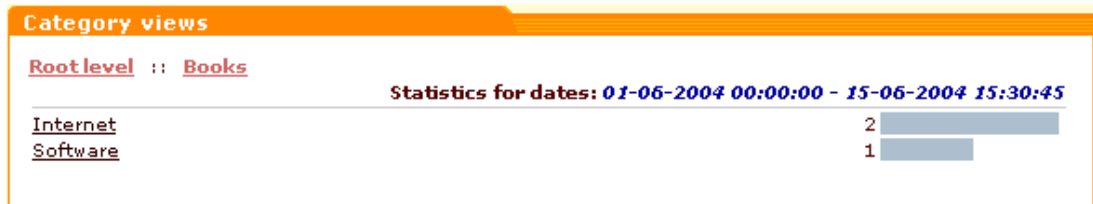
Click on the name of a subcategory to see which products inside this subcategory were viewed during the specified period and how many times each of the products was viewed (a product is considered 'viewed' if a customer clicked on its 'See details' link). Clicking on the name of a product in the 'Product views' section enables you to see its details.

Picture 5: Product views.

The 'Product sales' section allows you to see how many products were actually sold during the specified period (a product is considered 'sold' when the order that includes this product gets the status 'processed').

Picture 6: Product sales.

Product sales

Statistics for dates: *01-06-2004 00:00:00 - 15-06-2004 16:23:34*

#67   Designing Web Usability   1

The section 'Deleted from the cart' shows how many times each of the products listed here was deleted from a customer's shopping cart after being placed in there.

Picture 7: Products deleted from cart.

Deleted from the cart

Statistics for dates: *01-06-2004 00:00:00 - 15-06-2004 16:00:21*

#67   Designing Web Usability   1

'Referer statistics' section allows you to find out what sites referred visitors to your store most effectively.

Top paths through site

The 'Top Paths Through Site' section enables you to view the paths your visitors took through your site during the past period. A 'path' is a succession of pages a customer visits from the moment he enters the store to the moment he leaves. In brackets you can see the average time (in seconds) spent by your visitors on a separate page within a path. The number in the **VISITS** column shows how many times the path was taken by your visitors. The last column shows how many percent of the total number of visits falls to the share of this or that path.

Picture 8: Top Paths Through Site.

Top Paths Through Site

#	PATHS THROUGH SITE (AVERAGE TIME)	VISITS	%
1	1. /~svowl/eshop_dohtur/customer/home.php?cat=23 (7.00) 2. /~svowl/eshop_dohtur/customer/home.php?cat=3 (3.00)	1	11.11
2	1. /~svowl/eshop_dohtur/customer/home.php?cat=3 (3.00) 2. /~svowl/eshop_dohtur/customer/home.php?cat=23 (7.00) 3. /~svowl/eshop_dohtur/customer/home.php?cat=3 (3.00)	1	11.11
3	1. /~svowl/eshop_dohtur/customer/home.php?cat=3 (3.00) 2. /~svowl/eshop_dohtur/customer/home.php?cat=23 (7.00)	1	11.11
4	1. /~svowl/eshop_dohtur/customer/home.php?cat=23 (7.00) 2. /~svowl/eshop_dohtur/customer/home.php?cat=3 (3.00) 3. /~svowl/eshop_dohtur/customer/home.php?cat=23 (7.00)	1	11.11
5	1. /~svowl/eshop_dohtur/customer/home.php?cat=3 (3.00) 2. /~svowl/eshop_dohtur/customer/home.php?cat=23 (7.00) 3. /~svowl/eshop_dohtur/customer/home.php?cat=3 (3.00) 4. /~svowl/eshop_dohtur/customer/home.php?cat=23 (7.00)	1	11.11
6	1. /~svowl/eshop_dohtur/customer/home.php?cat=23 (7.00) 2. /~svowl/eshop_dohtur/customer/register.php (0.00)	1	11.11
7	1. /~svowl/eshop_dohtur/customer/home.php?cat=3 (3.00) 2. /~svowl/eshop_dohtur/customer/home.php?cat=23 (7.00) 3. /~svowl/eshop_dohtur/customer/register.php (0.00)	1	11.11
8	1. /~svowl/eshop_dohtur/customer/home.php?cat=23 (7.00) 2. /~svowl/eshop_dohtur/customer/home.php?cat=3 (3.00) 3. /~svowl/eshop_dohtur/customer/home.php?cat=23 (7.00) 4. /~svowl/eshop_dohtur/customer/register.php (0.00)	1	11.11
9	1. /~svowl/eshop_dohtur/customer/home.php?cat=3 (3.00) 2. /~svowl/eshop_dohtur/customer/home.php?cat=23 (7.00) 3. /~svowl/eshop_dohtur/customer/home.php?cat=3 (3.00) 4. /~svowl/eshop_dohtur/customer/home.php?cat=23 (7.00) 5. /~svowl/eshop_dohtur/customer/register.php (0.00)	1	11.11

Paths through site - The sequence of pages a visitor views, from the entry page to the exit page.

Average time - The average time the visitors spend on each page in the specified path (in seconds).

Visits - The number of visits to the specified path.

Note. You can view any page in a path by clicking on its URL.

Top pages views

The 'Top Pages Views' section enables you to view what pages your customers visited during the past period. The **PAGE URL** column shows the URLs of the pages viewed by your customers. The **AVERAGE TIME** column shows the average time (in seconds) spent by your visitors on a separate page. The number in the **VISITS** column shows how many times the page was viewed by your visitors. The last column shows how many percent of the total number of visits falls to the share of this or that page.

Picture 9: Top Pages Views.

PAGE URL	AVERAGE TIME	VISITS	%
1. /~svowl/eshop_dohtur/customer/cart.php	4	21	42.86
2. /~svowl/eshop_dohtur/customer/home.php	3	7	14.29
3. /~svowl/eshop_dohtur/customer/home.php?cat=75	4	5	10.20
4. /~svowl/eshop_dohtur/customer/	1	4	8.16
5. /~svowl/eshop_dohtur/customer/register.php?	14	2	4.08
6. /~svowl/eshop_dohtur/customer/home.php?cat=3	3	2	4.08
7. /~svowl/eshop_dohtur/customer/home.php?cat=23	2	2	4.08
8. /~svowl/eshop_dohtur/customer/register.php	72	1	2.04
9. /~svowl/eshop_dohtur/customer/error_message.php?login_incorrect	34	1	2.04
10. /~svowl/eshop_dohtur/customer/home.php?cat=79	5	1	2.04
11. /~svowl/eshop_dohtur/customer/giftcert.php	3	1	2.04
12. /~svowl/eshop_dohtur/customer/home.php?cat=243	2	1	2.04
13. /~svowl/eshop_dohtur/customer/home.php?cat=81	2	1	2.04

Page URL - The URL of the page viewed by the visitor.

Average time - The average time the visitors spend on the specified page (in seconds).

Visits - The number of visits to the specified page.

Note. You can view any page by clicking on its URL.

Shopping cart conversion funnel

The 'Shopping cart conversion funnel' is one of the most powerful tools that can help you evaluate the efficiency of your store. Knowing how many visits there were in your store during some period does not give you much benefit in the sense that you do not know how efficient those visits were. In other words, who cares how many thousands of visitors you get a month, if none of them will ever buy anything?

This section helps you evaluate how successfully your visitors make it through the process of buying products at your store.

We singled out a few steps that a customer needs to take before his order gets placed and completed (they are listed in the first column of the 'Shopping Cart Conversion Funnel' table).

First, he needs to view product info and decide what he wants to buy ('Viewed product information').

Second, he needs to start a shopping cart: to put a product into his cart, to decide on the quantity, color, size, etc of the product that he wants to buy and to select a delivery method ('Started Cart').

Third, he needs to begin the process of checkout. This third step makes all the difference between registered and non-registered users. If a user is not registered, when he initiates the process of checkout he is required to fill out a registration form (otherwise you will not know where to ship the ordered product). If a user is registered, you already have his address and contact info, so he skips the step of filling out the registration form and is allowed to proceed to selecting a payment method. If you refer to the table below, you will find out that registered users

start checkout directly from the fourth step of our scenario analysis ('Checkout: Step 2'), while non-registered users have to go through both third ('Checkout: Step 1') and fourth ('Checkout: Step 2').

On the fifth step ('Checkout: Step 3') all the users that got this far have to confirm their payment details and submit the order. They get to the sixth step ('Order Complete') when their order gets the status 'complete'.

Picture 10: *Shopping Cart Conversion Funnel.*

Shopping Cart Conversion Funnel

SCENARIO ANALYSIS STEP	VISITS	% OF PREVIOUS STEP	% OF ALL VISITS
1. Viewed product information	0	-	0.00%
2. Started Cart	4	400.00%	8.16%
3. Checkout: Step 1 (Registration Form)	0	0.00%	0.00%
4. Checkout: Step 2 (Payment method selection)	4	100.00%(400.00%)*	8.16%
5. Checkout: Step 3 (Confirmation and Submit)	4	100.00%	8.16%
6. Order Complete	3	75.00%	6.12%

* - If a registered customer starts a shopping cart and initiates the process of checkout, he is not required to fill out the registration form and proceeds directly to selecting a payment method. Thus, Checkout: Step 1 (Registration Form) is skipped in the Senario Analysis. Line 4 of the table above shows two values for Checkout: Step 2 (Payment method selection). The first value in the "% of Previous Step" column is calculated as a % of the sum of visits pertaining to Line 2 and Line 3. The second value (in brackets) is a % of all product information viewing visits that lead to selecting a payment method.

Scenario Analysis Step - The name of the step in the defined scenario. The step marks progress on the path that is being monitored.

Visits - The number of visits in which the specified step was followed.

% of Previous Step - How many percent of visits to the previous step resulted in visiting this step.

% of All Visits - Percentage of the total number of visits that viewed this step.

The **VISITS** column of the 'Shopping Cart Conversion Funnel' table helps you see how many visits to each of the enumerated steps took place. **% OF PREVIOUS STEP** column shows how many percent of the visits to the previous step resulted in visiting this step (in other words, how many visitors got here from the previous step - in percent). **% OF ALL VISITS** column shows the percentage of the total number of visits that falls to the share of this or that step.

Note. Line 4 of the table shows two values for Checkout: Step 2 (Payment method selection). The first value in the "% of Previous Step" column is calculated as a % of the sum of visits pertaining to Line 2 and Line 3. The second value (in brackets) is a % of all product information viewing visits that lead to selecting a payment method.

Log in history

The 'Log in history' section shows the users that logged into your store during the past period. For each user you can see the time of his login and logout, the login name, the user type to

which he belongs, the IP address from which the user accessed your store and the login status (for example, if a user entered a wrong password at the time of logging into the store, his login gets the status '*failure*').

Picture 11: *Log in history.*

DATE	LOGIN	USERTYPE	ACTION	IP	STATUS
15-06-2004 15:11:51	customer	C	login	192.168.10.66	success
15-06-2004 15:12:09	admin	A	logout	192.168.10.66	success
15-06-2004 15:12:16	admin	A	login	192.168.10.66	success
15-06-2004 15:12:59	customer	C	logout	192.168.10.66	success
15-06-2004 15:13:09	customer	C	login	192.168.10.66	**failure**

Delete for selected dates   Delete all

Note. You can view the profile details of any user by clicking on his login name.

Visitors environment statistics

X-Cart allows you to get statistics about what kind of computers your customers use to access your store (browser, platform, screen resolution, ability to use Java, JavaScript and cookies). This information can help you build your online store so it can look and function its best for the majority of your customers.

Picture 12: *Visitors environment statistics.*

BROWSER	PLATFORM	SCREEN RESOLUTION	JAVA	JAVASCRIPT	COOKIE	NUMBER
MSIE 6	Win32	1024x768	Enabled	Enabled	Enabled	3

The last column shows the number of visits of users with similar environment.

Users online

'Users online' section provides information about the users currently viewing your shop pages. You can see the names of customers using your store at the moment (**CUSTOMER** column), the date and time of their first and last entries (**DATE** column), the pages they are currently viewing (**CURRENT PAGE** column), and the contents of their shopping carts (**CART CONTENT** column). First entry is the time when a customer comes to your store. Last entry is the time when he last performs an action which results in page reloading. If a customer is inactive for a period of time exceeding the allowable period of inactivity for customers, the record about this customer is removed from the Users online table.

Picture 13: *Users online.*

You can view a customer's profile details by clicking on his name link. Clicking on a page url link opens the page in a new window. Clicking on a product title allows you to view the details of the product.

Search statistics

The 'Search statistics' section shows what your customers tried to find in your store during the past period. The

SEARCH STRING column displays what was submitted to the product search engine. The **DATE** column shows when the query was performed.

Picture 14: Search statistics.

Related topics:

Summary Page (Administrator)

Selecting Modules

General Options

6.3.11   Managing Your News

You can set up news lists for your users to subscribe. X-Cart allows you to have multiple news lists for one store. Any registered or unregistered user can subscribe to all active news lists by

entering his email into the appropriate field in the 'News' area and clicking on **Subscribe**.

Picture 1: 'News' area (Customer zone).

Note. The 'News' area is not displayed on the customer front-end unless there is at least one news list created.

Alternatively, a user can subscribe to just some of the news lists available at the store: a new user can select the news lists to subscribe to in the 'Profile details' form at the time of registration, a registered user can subscribe to and unsubscribe from the available news lists by modifying his profile. When a user subscribes to some news list, his e-mail address is automatically added to the mailing list for that news list. Besides, e-mail addresses can be added to the mailing list manually by the store admin. Admin also has the ability to export and import files with lists of e-mail addresses. If a user wants to discontinue his subscription to a news list, he can do it at any time by visiting the URL provided in each newsletter.

To set up a news list you need to:

1. create a news list (give it a name, provide a description and specify if the news list should be shown on the store site and be available for subscription)
2. create/update the mailing list for this news list
3. create messages to be shown on the site and to be included into the newsletters

Note. The option **Reply-To newsletter email address** can be set in General settings -> Company options (the address specified in this line will be seen by the news list subscribers as the sender's e-mail).

Managing your news lists

All news lists on your system are displayed in the 'News Lists' form. You can access it by clicking on **News management** in the Management menu.

Picture 2: News Lists form.

You can create, update and delete news lists and view news list details.

Creating a news list
  1. Click on **News management** in the Management menu. The 'News Lists' form will appear.

Picture 3: News Lists form.

  2. Click on **Add new**.
  3. In the 'News list details' form specify the short name for the news list and enter list description.

Picture 4: News list details form.

  4. Use the drop-down boxes to select if the news list should be available for subscription and if messages should be shown in the site news.

5. Click on **Save**. The newly created news list will appear in the 'News Lists' form. You can view this form by clicking the **News lists** link in the corner of the 'News list details' form or in the " See also" menu after the new list was created. If you want to create more news lists, click on **Add News list** in the "See also" menu.

Viewing and modifying news list details
1. Click on **News management** in the Management menu. The 'News Lists' form will appear.
2. Click on the name of the news list the details of which you would like to view/modify. The 'News list details' form will be opened.
3. If necessary, modify the details and click on **Save**.

Deleting a news list
1. Click on **News management** in the Management menu. The 'News Lists' form will appear.
2. Select the news list you would like to delete. Use the **Check all / Uncheck all** links to select or unselect all the boxes.
3. Click on **Delete selected**.

Updating a news list
1. Click on **News management** in the Management menu. The 'News Lists' form will appear.
2. Select or unselect the check boxes in the **SHOW AS NEWS** and **ACTIVE** columns for the news lists you would like to update.

   - If you want a news list to be available for subscription, select **ACTIVE** for this list. Unselect **ACTIVE** to make a news list unavailable for subscription.

   - If you want a news message to be displayed in the 'News' area, select **SHOW AS NEWS** and **ACTIVE** for the news list to which this message belongs and **Show as news** check box for this message. The 'News' area displays the latest message (The other messages can be viewed by clicking on the **Previous news** link).

   - The 'News' area displays the message "No news available at the moment" if **ACTIVE** or **SHOW AS NEWS** check boxes are unselected for all the lists.
3. Click on **Update**.

Managing the mailing lists

After you have created a news list, you can edit its mailing list. The mailing list can be accessed by clicking on **Subscribers** in the section menu.

Picture 5: News list mailing list form.

The mailing list is a list of e-mail addresses of the news list subscribers. For each of the addresses there is a date since when the subscription is active.

Adding e-mail addresses to the subscription
1. Enter the necessary e-mail address into the appropriate field in the 'Add to the subscription' section.
2. Click on **Add**.

Deleting e-mail addresses from the subscription
1. Select the e-mail address you want to delete. Use the **Check all / Uncheck all** links to select or unselect all the boxes.
2. Click on **Delete**.

Exporting e-mail addresses

You can export selected subscriber's addresses to a separate file:
1. In the 'News list mailing list' form select the addresses you want to export. Use the **Check all / Uncheck all** links to select or unselect all the boxes.
2. Click on **Export**.

Importing e-mail addresses

If you have a list of e-mail addresses, you can import it into X-Cart.
1. In the Import list of subscribers section use the **Browse** button to locate the file you need to import.
2. Click on **Import**.

Managing the news list messages

After you have created a news list, you can create messages for it. The 'News list messages' form can be accessed by clicking on **Messages** in the section menu.

Picture 6: *News list messages form.*

Adding new messages

1. Open the 'News list messages' form. Click on the **Add new** button. 'News list message details' form will appear.

Picture 7: *News list message details form.*

2. Enter the subject of the message.
3. Enter the message body.
4. Use the drop-down lists to specify if HTML tags should be allowed in the message and if the message should be shown as news.
5. You can specify a few e-mail addresses to send the created message to (for test).
6. Click on **Save**. The created message will be added to the list of messages.
7. Repeat steps 1-6 to add more messages to the news list.

Modifying messages
1. Open the 'News list messages' form. Click on the subject of the message you would like to modify. 'News list message details' form will appear.
2. Modify the necessary details.
3. Click on **Save**.

Deleting messages
1. In the 'News list messages' form select the messages you want to delete.
2. Click on **Delete selected**.

Sending messages

After you create a new message, it appears in the 'News list messages' form. For each of your messages you can see its subject, the time of creation and status. Before you send a message, its status is '*Queued*'. To send a message you should click on the **Send** button next to it. As soon as you send a message, its status is changed to '*Sent*'. A sent message can be sent again by clicking on the **Resend** button.

6.3.12   Defining Shipping Methods

X-Cart shopping cart software allows you to define shipping methods that should be available to your customers. Using the 'Edit shipping methods' form in the 'Shipping Methods' section of X-Cart administrative zone you can create and edit shipping methods, activate and deactivate them. The 'Shipping Methods' section can be accessed by clicking on **Shipping methods** in the Management menu.

Note. If there is no **Shipping methods** item in the Management menu, shipping is disabled in your store. To activate shipping, unselect the **Disable shipping** check box (General settings -> Shipping options).

> *Picture 1: Edit shipping methods form.*

There are 2 major groups of shipping methods that you can use at your store:

1. *Shipping methods with manually defined rates*:

   • methods added by you (listed in the 'Defined shipping methods' subsection of the 'Edit shipping methods' form)

   • methods listed in the 'Real-time calculated shipping methods' subsection of the 'Edit shipping methods' form that do not get rates from real-time calculation services

   Rates for these methods are set up by the product vendors through the 'Shipping charges' section in the provider zone.

2. *Shipping methods with real-time calculated rates:*

   • methods listed in the 'Real-time calculated shipping methods' subsection of the 'Edit shipping methods' form that get rates from real-time calculation services.

   Rates for these methods are delivered by Intershipper or by special integrated modules from real-time shipping services like UPS, USPS, FedEx, Airborne, etc.

Managing methods with manually defined rates

Adding new shipping methods

You can add shipping methods of your own and define (or allow your vendors to define) rates for these methods using the 'Shipping charges' section of the provider zone. To add a new shipping method:

1. Click on **Shipping Methods** in the Management menu. The 'Edit shipping methods' form will appear.
2. In the 'Add shipping method' subsection specify the name for the new method, the shipping period in days (the average number of days in which ordered products can be shipped to the customer), the weight limit (the maximum weight that can be shipped using this method; set the value of this field to zero or leave empty if there are no limitations), and the position number (the number affecting the order in which the shipping methods are displayed to your customers).
3. Select *National* or *International* from the **DESTINATION** drop down list, depending on whether this shipping method can be used for shipping goods to national or international locations. If you select *National*, this shipping method will not be available to international customers and customers who are not logged in. *International* shipping methods are only displayed to customers from countries different from the country of shop location.
4. Click on **Update**. The new method will be added to the list in the 'Defined shipping methods' subsection. It will be marked as active.

> **Note**. If you need to temporarily disable the new shipping method, unselect the **ACTIVE** check box next to it and click on **Update**.

Editing shipping methods

You can edit shipping methods of your own (listed in the 'Defined shipping methods' subsection) and shipping methods provided by the services listed in 'Real-time calculated shipping methods' subsection. To edit a shipping method:

1. Click on **Shipping Methods** in the Management menu. The 'Edit shipping methods' form will appear.
2. Locate the shipping method you want to edit. Your own shipping methods are listed in the 'Defined shipping methods' subsection of the 'Edit shipping methods' form. Methods provided by the services listed in 'Real-time calculated shipping methods' subsection can be accessed by clicking on the names of the shipping services.
3. Make the necessary changes:

   • For a real-time calculated shipping method, the shipping period, the weight limit and the position number can be changed.

   • For a method added by yourself, the name, the shipping period, the destination, the weight limit and the position number can be changed.
4. Click on **Update**.

Activating/deactivating shipping methods

You can activate/deactivate shipping methods of your own (listed in the 'Defined shipping methods' subsection) and shipping methods provided by the services listed in 'Real-time calculated shipping methods' subsection. To change the status of a shipping method:

1. Click on **Shipping Methods** in the Management menu. The 'Edit shipping methods' form will appear.
2. Locate the shipping method you need to activate/deactivate. Your own shipping methods are listed in the 'Defined shipping methods' subsection of the 'Edit shipping methods' form. Methods provided by the services listed in 'Real-time calculated shipping methods' subsection can be accessed by clicking on the names of the shipping services.
3. Select/unselect the check box in the **ACTIVE** column next to the shipping method the status of which you want to change. You can use the **Check all / Uncheck all** links to select all the real-time shipping methods on the page.
3. Click on **Update**.

Deleting shipping methods

You can delete shipping methods you created. To delete a shipping method:
1. Click on **Shipping Methods** in the Management menu. The 'Edit shipping methods' form will appear.
2. In the 'Defined shipping methods' form find the shipping method you need to delete. Click on the **Delete** button next to this shipping method.

Managing methods with real-time calculated rates

Editing shipping methods

You can edit real-time calculated shipping methods provided by the services listed in 'Real-time calculated shipping methods' subsection. To edit a shipping method:
1. Click on **Shipping Methods** in the Management menu. The 'Edit shipping methods' form will appear.
2. Locate the shipping method you want to edit (Methods can be accessed by clicking on the names of shipping services).
3. Make the necessary changes: the shipping period, the weight limit and the position number can be changed.
4. Click on **Update**.

Activating/deactivating shipping methods

You can activate/deactivate real-time calculated shipping methods provided by the services listed in 'Real-time calculated shipping methods' subsection. To change the status of a shipping method:
1. Click on **Shipping Methods** in the Management menu. The 'Edit shipping methods' form will appear.
2. Locate the shipping method you need to activate/deactivate (Methods can be accessed by clicking on the names of shipping services).
3. Select/unselect the check box in the **ACTIVE** column next to the shipping method the status of which you want to change. You can use the **Check all / Uncheck all** links to select all the

real-time shipping methods on the page.
3. Click on **Update**.

> **Note**. Real-time processors options can be set up or edited via the Options >> links next to the names of shipping services (like Canada Post, FedEx and USPS) in the 'Real-time calculated shipping methods' subsection of the 'Edit shipping methods' form. UPS OnLine ® Tools can be configured via the 'UPS OnLine ® Tools configure' link.

Related topics:

Setting up Real-time Processors

UPS OnLine ® Tools

Defining Destination Zones

Defining Shipping Charges

6.3.13   Setting up Real-Time Processors

If you are going to enable your customers to use real-time shipping cost calculation, you will have to set up the appropriate real-time processors.

Setting up InterShipper

If you want to use InterShipper for real-time shipping rates calculation please follow the steps listed below.
1. Go to the site www.intershipper.com and register for an account with InterShipper.
2. Log in to X-Cart admin area and go to the Administration menu -> General settings -> Shipping options section.
3. Select the **Real-time shipping calculation** check box.
4. Select the **If selected, use Intershipper calculation services**... check box.
5. Provide your InterShipper account information by entering your InterShipper username and password into the appropriate fields on the Shipping options page. Click on **Save**.

   Picture 1: Intershipper account section of the Shipping options page.

ENTER YOUR ACCOUNT DETAILS. THE ACCOUNT SHOULD BE PURCHASED FROM WWW.INTERSHIPPER.COM	
Intershipper username:	
Intershipper password:	

6. Go to the Shipping methods section of the admin zone (Management menu->Shipping methods), select **Real-time processors options** from the section menu.

7. Fill in the InterShipper options form according to your preferences. Click on **Apply**.

Picture 2: *InterShipper options.*

6. If you haven't yet provided your original address in the Administration menu -> General settings -> Company options section, do it now.
7. Go back to the Management menu -> Shipping methods -> Test Real-time Shipping Rates Calculation section and try to test real-time shipping rates calculation:
   - enter a destination address (for test purposes only)

   - enter package weight (units should be defined in the Administration menu -> General settings -> General options section: 'Weight symbol' and 'Grams in the unit of weight defined by the weight symbol');

   - click on the **Submit** button to get XML request and response results and estimated shipping rates.

Setting up Airborne

If you want to use Airborne for real-time shipping rates calculation please follow the steps listed below.

1. Go to the site www.airborne.com and register for an account.
2. Log in to X-Cart admin area and go to the Administration menu -> General settings -> Shipping options section.
3. Select the **Real-time shipping calculation** check box.
4. Provide your Airborne account information by entering your Airborne API System ID, Airborne API password and Airborne Account Number into the appropriate fields on the Shipping options page. If you are going to test this processor first, select **Use Airborne test**

server check box. Click on **Save**.

Picture 3: Airborne account section of the Shipping options page.

5. Go to the Shipping methods section of the admin zone (Management menu->Shipping methods), click the **Options** link opposite Airborne to define options for this processor.
6. Fill in the Airborne options form according to your preferences. Click on **Apply**.

Picture 4: Airborne options.

7. If you haven't yet provided your original address in the Administration menu -> General settings -> Company options section, do it now.
8. Go back to the Management menu -> Shipping methods -> Test Real-time Shipping Rates Calculation section and try to test real-time shipping rates calculation:

   - enter a destination address (for test purposes only)
   - enter package weight (units should be defined in the Administration menu -> General settings -> General options section: 'Weight symbol' and 'Grams in the unit of weight defined by the weight symbol');
   - click on the **Submit** button to get XML request and response results and estimated shipping rates.

Setting up Canada Post

If you want to use Canada Post for real-time shipping rates calculation please follow the steps listed below.

1. Go to the site http://www.canadapost.ca and register for an account.
2. Log in to X-Cart admin area and go to the Administration menu -> General settings -> Shipping options section.
3. Select the **Real-time shipping calculation** check box.
4. Provide your Canada Post account information by entering your Canada Post merchant ID into the appropriate field on the Shipping options page. If you are going to test this processor first, select **Use Canada Post test server** check box. Click on **Save**.

Picture 5: Canada Post account section of the Shipping options page.

5. Go to the Shipping methods section of the admin zone (Management menu->Shipping methods), click the **Options** link opposite Canada Post to define options for this processor.
6. Fill in the Canada Post options form according to your preferences. Click on **Apply**.

Picture 6: Canada Post options.

7. If you haven't yet provided your original address in the Administration menu -> General settings -> Company options section, do it now.
8. Go back to the Management menu -> Shipping methods -> Test Real-time Shipping Rates Calculation section and try to test real-time shipping rates calculation:

   - enter a destination address (for test purposes only)

   - enter package weight (units should be defined in the Administration menu -> General settings -> General options section: 'Weight symbol' and 'Grams in the unit of weight defined by the weight symbol');

   - click on the **Submit** button to get XML request and response results and estimated shipping rates.

Setting up FedEx

If you want to use FedEx for real-time shipping rates calculation please follow the steps listed below.

1. Log in to X-Cart admin area and go to the Administration menu -> General settings -> Shipping options section.
2. Select the **Real-time shipping calculation** check box. Click on **Save**.
3. Go to the Shipping methods section of the admin zone (Management menu->Shipping methods), click the **Options** link opposite FedEx to define options for this processor.
4. Fill in the FedEx options form according to your preferences. Click on **Apply**.

Picture 7: *FedEx options.*

5. If you haven't yet provided your original address in the Administration menu -> General settings -> Company options section, do it now.
6. Import FedEx zone locator charts and rates tables by clicking on the **Import** button (the files will be imported from the location specified in the field 'Server path to files' to the database). Mind that FedEx rates are subject to change, and periodically you will have to import rates data from FedEx site to ensure up-to-date rates for your customers. Click the '**Read more**

about importing here...' link at the bottom of the 'FedEx options' form to find out how that can be done.
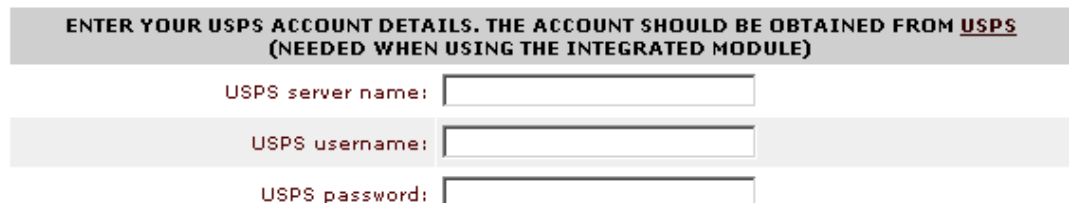
7. Go back to the Management menu -> Shipping methods -> Test Real-time Shipping Rates Calculation section and try to test real-time shipping rates calculation:

   - enter a destination address (for test purposes only)

   - enter package weight (units should be defined in the Administration menu -> General settings -> General options section: 'Weight symbol' and 'Grams in the unit of weight defined by the weight symbol');

   - click on the **Submit** button to get XML request and response results and estimated shipping rates.

Setting up U.S.P.S.

If you want to use U.S.P.S. for real-time shipping rates calculation please follow the steps listed below.

1. Go to the site http://www.usps.com and register for an account.
2. Log in to X-Cart admin area and go to the Administration menu -> General settings -> Shipping options section.
3. Select the **Real-time shipping calculation** check box.
4. Provide your U.S.P.S. account information by entering the U.S.P.S. server name, your U.S.P.S. username and password into the appropriate fields on the Shipping options page. Click on **Save**.

Picture 8: U.S.P.S. account section of the Shipping options page.

5. Go to the Shipping methods section of the admin zone (Management menu->Shipping methods), click the **Options** link opposite U.S.P.S. to define options for this processor.
6. Fill in the U.S.P.S. options form according to your preferences. Click on **Apply**.

Picture 9: U.S.P.S. options.

7. If you haven't yet provided your original address in the Administration menu -> General settings -> Company options section, do it now.
8. Go back to the Management menu -> Shipping methods -> Test Real-time Shipping Rates Calculation section and try to test real-time shipping rates calculation:

    - enter a destination address (for test purposes only)

    - enter package weight (units should be defined in the Administration menu -> General settings -> General options section: 'Weight symbol' and 'Grams in the unit of weight defined by the weight symbol');

    - click on the **Submit** button to get XML request and response results and estimated shipping rates.

Setting up UPS

If you want to use UPS for shipping your goods, you will have to enable and configure 'UPS OnLine ® Tools'. Please note that you can use 'UPS OnLine ® Tools' module in combination with other real-time shipping modules (USPS, FedEx, DHL). To configure UPS OnLine ® Tools, either go to the 'Shipping methods' section of the admin zone (Management menu->Shipping methods) and click the '**UPS OnLine Tools configure**' link opposite UPS, or click on **UPS OnLine ® Tools** in the Management menu. You can find information on setting up UPS in the topic 'UPS OnLine Tools' of this manual.

Note. Real-time shipping rates calculation may be also tested via the General settings -> Shipping options section

Related topics:

6.3.14   Defining Taxes

X-Cart shopping software provides you with a flexible tool for defining taxes to be used in your store. Simple settings allow you to add as many kinds of taxes as you need. The procedure is different for X-Cart GOLD and X-Cart PRO.

Setting up the taxing system in X-Cart GOLD
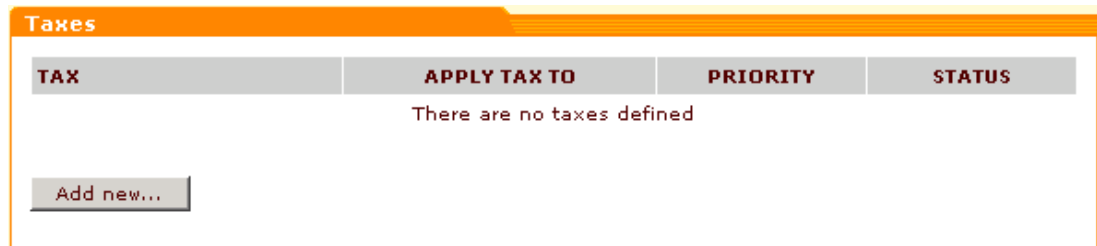
In X-Cart GOLD the provider (who at the same time is the store administrator) defines what kind of taxes should be applied to what products and sets tax rates for different destination zones and membership levels. If you are an X-Cart GOLD provider, here is what you need to do:
  1. Set up destination zones that should have different taxes (Inventory -> Destination zones).
  2. Add taxes and define their rates (Management -> Taxing system).
  3. Define taxes options.
  4. Define what products the created taxes should be applied to.

Adding a new tax and defining its rate(s)
  1. Click on **Taxing system** in the Management menu. The 'Taxes' form will be opened.

Picture 1: Taxes form.

Normally this form lists all the taxes defined for your store. If no taxes have been defined so far, the taxes list will be empty.
  2. In the 'Taxes' form click on **Add new**... The 'Tax details' form will appear.

Picture 2: 'Tax details' form (1).

3. To create a tax, fill in the 'Tax details' form (The fields marked by a red asterisk (*) sign are mandatory):

- Enter the tax service name (the one that will be used within X-Cart).

- Enter the tax display name (the one that will be shown to your customers). If necessary, you can have different tax display names for the different languages used in your store. To add a tax display name in another language, select the necessary language from the Current language selector, enter the tax display name in this language into the appropriate field and click on **Save**.

- Enter the tax registration number (needed for some types of taxes, for example, VAT; appears on the invoice)

- Enter the number defining the tax priority.

- Define the status of the tax by selecting *Enabled* or *Disabled* from the drop-down box.

- Use the tax formula editor to create the formula according to which this tax will be applied ('Apply tax to' subsection).

- Select if the tax rate should be calculated for Shipping Address or Billing Address.

- If you want your product prices to include this tax while being stored in the

database, select the 'Included into the product price' check box.

• If you want your customers to see taxed prices, select the 'Display product price including tax' check box. Leave this check box unselected if you want prices before the application of the tax to be displayed.

• Select the way the tax should be displayed on the products list, product details and cart pages: choose *Nothing* (if you do not want tax to be displayed on these pages), *Rate value* (for example, 17.5%), *Calculated tax cost* (for example, $5), *Rate value and tax cost* (if you want both to be displayed).

Picture 3: 'Tax details' form (2).
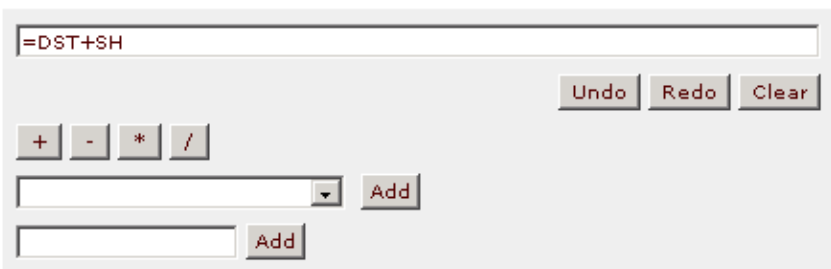
Notes on using the formula editor:

The 'Apply tax to' subsection of the 'Tax details' form allows you to create/edit a formula defining the sphere of application for the tax being edited.

Picture 4: Formula editor.

The formula appears in the top line of the editor as you assemble it from the contents of the 'Add' drop-down box, 'Add' input box and the mathematical signs:

' + ' (plus)

' - ' (minus)

' * ' (multiplication)

' / ' (division)

To add an element from the 'Add' drop-down box, select this element and click on **Add** next to the drop-down box. The set of available elements includes *ST* (Subtotal), *DST* (Discounted subtotal), *SH* (Shipping) and other defined taxes.

The 'Add' input box below is used to enter numbers. To add a number, type it into the field, then click on **Add** next to the input box.

To add a mathematical sign, just click on the button with this sign.

For example, if you want your tax to be applied to the sum of discounted subtotal and shipping cost:

   a. Select *DST* from the drop-down box, click on **Add**.

   b. Click on the ' + ' button.

   c. Select *SH* from the drop-down box, click on **Add**.

You can cancel the latest action by clicking on **Undo**, re-apply the change after the cancellation by clicking on **Redo**, and clear the whole formula line by clicking on **Clear**.

4. Click on **Save**. '<Tax name>:Tax rates' form will appear below the 'Tax details' form.

Picture 5: '<Tax name>:Tax rates' form (1).

5. Scroll down to the 'Add tax rate' subsection of the '<Tax name>: Tax rates' form and complete it:

a. Enter the tax rate value into the 'Rate value' field. Use the selectbox next to it to define if this value is flat or percent.

b. Select the destination zone to which this rate will be applied.

c. Select the membership level to which this rate will be applied.

d. If necessary, define what the rate should be applied to (Use the tax formula editor to build a formula).

Picture 6: '<Tax name>:Tax rates' form (2).

e. Click on **Add**.

The new rate will be added to the list above.

***Picture 7:** '<Tax name>:Tax rates' form (3).*

If you need to add more rates (for other destination zones or membership levels), repeat steps a-e.

6. If you want to create more taxes, return to the 'Taxes' form (click on the 'Taxes list' link in the top right corner of the 'Tax details' form) and repeat steps 2-6. The new taxes will be added to the taxes list.

Managing the Taxes list

The 'Taxes' form shows all the taxes defined for your store. **APPLY TAX TO** column shows what the tax should be applied to (e.g. 'DST + SH' in this column means that the tax is applied both to Discounted Subtotal and Shipping). **PRIORITY** column defines the order in which taxes should be applied (the tax with the smallest number in **PRIORITY** box is applied first). **STATUS** column shows if the tax is currently enabled or disabled.

Picture 8: Taxes form.

You can go to editing tax details by clicking on the tax name link.

You can change the order in which your taxes should be applied: just change their order numbers in the **PRIORITY** column and click on **Update**.

If you need to temporarily disable a tax, select *Disabled* from the drop-down box in the **STATUS** column and click on **Update**. Select *Enabled* and click on **Update** to re-enable the tax.

If you need to delete a tax, select the check box next to it and click on **Delete selected**. You can use **Check all** / **Uncheck all** links to select or unselect all the taxes on this page.

Setting taxes options

Taxes options can be set in the 'Taxes options' form: select the necessary check boxes and click on **Update**.

Picture 9: *Taxes options form.*

Defining what products the created taxes should be applied to

Basically, taxes are assigned to products individually: the taxes that should be applied to a product must be selected in the 'Apply tax' field of its 'Product details' form. You can either go to the 'Product details' section of every product in your store and set up the 'Apply taxes' field, or - if a certain number of the products must be taxed the same way - use group editing of products and adjust taxes for the whole group of products simultaneously. To assign the same taxes to a group of products, do the following:
1. Open for modification all the products which should be taxed same: do product search, select the products you want to modify and click on **Modify selected**.
2. In the 'Product details' section of any of the products opened for modification select the

check box next to the 'Apply taxes' field (That is done to make the value of this field common for all the products in the group being modified).

3. Select the taxes which should be applied to the products you are editing (To select more than one taxes, click on the names of these taxes with your mouse, holding down the 'Ctrl' key).

4. Click on **Save**.

Setting up the taxing system in X-Cart PRO

In X-Cart PRO the store admin sets up taxes, while each of the providers defines their own tax rates and specifies which taxes must be applied to individual products.

If you are an X-Cart PRO admin, here is what you need to do:
1. Set up destination zones that should have different taxes (Inventory -> Destination zones).
2. Add taxes (Management -> Taxing system).
3. Define taxes options.
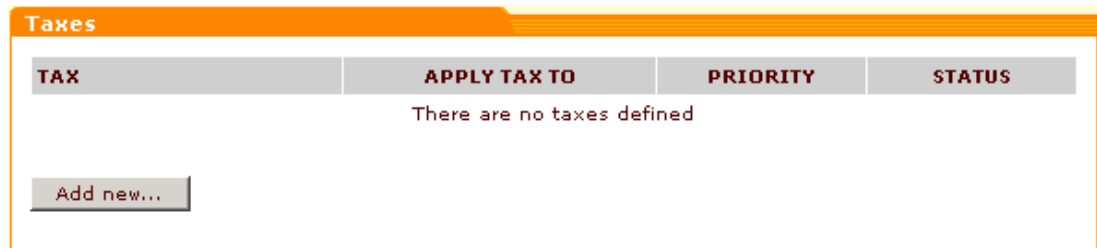
Then, each of your providers will need to:
1. Define tax rates.
2. Define what products the created taxes should be applied to.

Adding a new tax

1. Click on **Taxing system** in the Management menu. The 'Taxes' form will be opened. Normally this form lists all the taxes defined for your store. If no taxes have been defined so far, the taxes list will be empty.

Picture 10: Taxes form.

2. Click on **Add new...** The 'Tax details' form will appear.

Picture 11: Tax details.

3. Complete the 'Tax details' form. The fields marked by a red asterisk (*) sign are mandatory.

- Enter the tax service name (the one that will be used within X-Cart).

- Enter the tax display name (the one that will be shown to your customers). If necessary, you can have different tax display names for the different languages used in your store. To add a tax display name in another language, select the necessary language from the Current language selector, enter the tax display name in this language into the appropriate field and click on **Save**.

- Enter the tax registration number (needed for some types of taxes, for example, VAT; appears on the invoice)

- Enter the number defining the tax priority.

- Define the status of the tax by selecting *Enabled* or *Disabled* from the drop-down box.

- Use the tax formula editor to create the formula according to which this tax will be applied ('Apply tax to' subsection).

- Select if the tax rate should be calculated for Shipping Address or Billing Address.

- If you want your product prices to include this tax while being stored in the

database, select the 'Included into the product price' check box.

• If you want your customers to see taxed prices, select the 'Display product price including tax' check box. Leave this check box unselected if you want prices before the application of the tax to be displayed.

• Select the way the tax should be displayed on the products list, product details and cart pages: choose *Nothing* (if you do not want tax to be displayed on these pages), *Rate value* (for example, 17.5%), *Calculated tax cost* (for example, $5), *Rate value and tax cost* (if you want both to be displayed).

Picture 12: *Tax details.*

Notes on using the formula editor:

The 'Apply tax to' subsection of the 'Tax details' form allows you to create/edit a formula defining the sphere of application for the tax being edited.

Picture 13: *Formula editor.*

The formula appears in the top line of the editor as you assemble it from the contents of the 'Add' drop-down box, 'Add' input box and the mathematical signs:

' + ' (plus)

' - ' (minus)

' * ' (multiplication)

' / ' (division)

To add an element from the 'Add' drop-down box, select this element and click on **Add** next to the drop-down box. The set of available elements includes *ST* (Subtotal), *DST* (Discounted subtotal), *SH* (Shipping) and other defined taxes.

The 'Add' input box below is used to enter numbers. To add a number, type it into the field, then click on **Add** next to the input box.

To add a mathematical sign, just click on the button with this sign.

For example, if you want your tax to be applied to the sum of discounted subtotal and shipping cost:
   a. Select *DST* from the drop-down box, click on **Add**.
   b. Click on the ' + ' button.
   c. Select *SH* from the drop-down box, click on **Add**.

You can cancel the latest action by clicking on **Undo**, re-apply the change after the cancellation by clicking on **Redo**, and clear the whole formula line by clicking on **Clear**.

   4. Click on **Save**. The tax will be added to the list in the 'Taxes' form (you can return to it by clicking on the **Taxes list** link in the top right corner of the Tax details form).

Managing the Taxes list

The 'Taxes' form shows all the taxes defined for your store. **APPLY TAX TO** column shows what the tax should be applied to (e.g. 'DST + SH' in this column means that the tax is applied both to Discounted Subtotal and Shipping). **PRIORITY** column defines the order in which taxes should be applied (the tax with the smallest number in **PRIORITY** box is applied first). **STATUS** column shows if the tax is currently enabled or disabled.

> **Picture 14:** *Taxes form.*

You can go to editing tax details by clicking on the tax name link.

You can change the order in which your taxes should be applied: just change their order numbers in the **PRIORITY** column and click on **Update**.

If you need to temporarily disable a tax, select *Disabled* from the drop-down box in the **STATUS** column and click on **Update**. Select *Enabled* and click on **Update** to re-enable the tax.

If you need to delete a tax, select the check box next to it and click on **Delete selected**. You can use **Check all** / **Uncheck all** links to select or unselect all the taxes on this page.

Setting taxes options

Taxes options can be set in the 'Taxes options' form: select the necessary check boxes and click on **Update**.

Picture 15: Taxes options form.

Note. Please refer to 'Managing Products and Orders' -> 'Inventory' -> 'Defining Tax Rates' (in this manual) for information about the provider's actions.
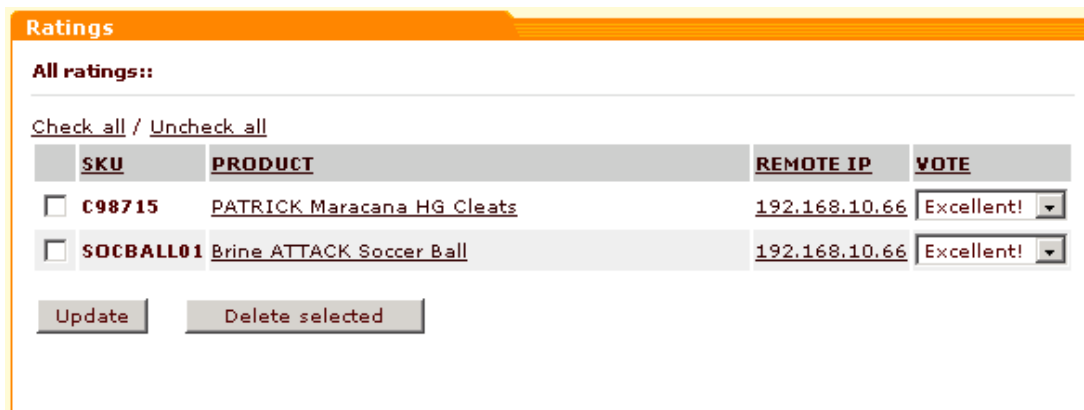
Related topics:

Defining Tax Rates

6.3.15   Editing Product Ratings

Customers can rate the products in your store by voting. Admin can edit their ratings. To view customer ratings and edit them, click on **Edit ratings** in the Management menu. The Ratings form will appear.

Picture 1: Ratings.

This form shows all the ratings in your store. The search results may be sorted by clicking on the column headers (for example, if you want the results list to be sorted by the product name, click on the **PRODUCT** column header).

If you want to see all the ratings from one IP, click on the corresponding IP.

If you want to see all the ratings for one product, click on the corresponding product name.

If you want to see all the ratings in your store, click on the **Show all ratings** link.

To change the rating of a product or products, select the new rate from the drop-down list and click on **Update**.

To delete a rating, select the check boxes next to the ratings you would like to delete and click on **Delete selected**.

Use the **Check all / Uncheck all** links to select or unselect all the boxes.

Related topics:
Editing Customer Reviews

6.3.16   Defining Countries

The 'Countries Management' section allows you to define what countries will be 'active' for your store (an 'active' country is a country the residents of which can purchase products at your store). The names of the activated countries appear in the list of countries on the user registration form and are used for setting up destination zones.

By default all the countries are active. In practice, you will probably have to limit the number of countries with which you will be able to work.

To see which countries are currently activated and to change the set of activated countries, click on **Countries** in the Management menu.

In the 'Countries' form you can see a list of countries. The countries are divided into several regions. You can navigate between the different regions by clicking on the links in the top section of the form.

Define which of the countries should appear in the customer's registration form in the country drop down list and be used for tax and shipping calculations by selecting the check boxes in the **ACTIVE** column. You can use the **Check all** / **Uncheck all** links to select or unselect all the check boxes in the **ACTIVE** column on the current page.

You can activate or deactivate all the countries (in all the regions) by clicking on **Activate All** or **Deactivate All**.

For each of the countries there is a two-letter code (**CODE** column). Country codes are used for the inner processes of the shopping cart.

Picture 1: Countries form.

HAS STATES checkboxes can be used by you to indicate whether a country is divided into states or not (the setting is used for a more detailed adjustment of the registration form). Select the check boxes in the **HAS STATES** column for the countries that have states.

Charset codes for active countries can be provided by you to ensure that the content of your HTML pages is displayed correctly by the browsers of your store users and the text entered into the text areas is properly saved in the database. Use the **CHARSET** column to specify the character set for each of the active countries.

If you change any information in the 'Countries' form, click on **Update** to save the changes.

Related topics:

Defining Tax Rates

6.3.17   Defining States and Counties

Defining states

The 'States Management' section of X-Cart enables you to create lists of states for the countries that you made 'active' for your store. State codes are used for the inner processes of the shopping cart. State names appear in the list of states on the user registration form and are used for setting up destination zones.

To access the 'States Management' section, click on **States** in the Management menu.

If more than one country was activated for your store, use the country name link on top of the 'States' form to select the country the states of which you want to be listed.

Picture 1: States form.

----
break---

Note. 'Counties' column appears in the table only when 'Use counties' check box is selected in General settings -> General options.

Adding a new state to the list
1. Click on **States** in the Management menu. The 'States' form will appear.
2. Scroll down to the **Add new state** section.
3. Enter the state code.
4. Enter the name of the state.
5. From the drop-down list select the country to which the state should be added.
6. Click on **Add state**.

Note. The system sorts states alphabetically. To find the state you have added scroll to the corresponding letter.

Editing a state
1. Click on **States** in the Management menu. The 'States' form will appear.
2. Change the code and the name of the state.
3. Click on **Update** to save the changes.

Deleting states
1. Click on **States** in the Management menu. The 'States' form will appear.
2. Select the check boxes in the **DELETE** column next to the states you want to be deleted. You can use the **Check all / Uncheck all** links to select or unselect all the check boxes on the current page.
3. Click on **Delete selected**.

Defining counties

If you want to enable your customers to use 'County' select boxes in the address sections of their profile details form, you need to select 'Use counties' check box in General settings -> General options, activate 'County' field on the user profile details form in General settings -> User Profiles options and set up counties for the states activated for your store.

The **COUNTIES** column of the table in the 'States' form shows the actual number of counties defined for each state. Before any counties are defined, the **COUNTIES** column shows **n/a** opposite each state name.

Picture 2: *States form.*

To define counties for some state, click the link in the **COUNTIES** column opposite this state. The 'Counties Management' section will be opened.

Picture 3: *Counties form.*

Use the 'Add new county' section of the 'Counties' form to add names of counties: enter a name into the appropriate box and click on **Add**. The county will be added to the list above. You can add as many counties for each state as needed.

Picture 4: Counties form (a county has been added).

You can edit the names of the added counties: just change the spelling of a name in the list and click on **Update**.

To delete a county, select the check box opposite its name in the **DELETE** column, then click on **Delete selected**.

Related topics:

Defining Destination Zones

Defining Tax Rates

6.3.18   Managing the Stop List

Stop List module can help you to protect your store from an external attack involving usage of

stolen credit cards. It allows you to create a list of IP addresses supposedly used by holders of stolen credit cards. Customers using IP addresses stored in the Stop List are blocked on the Checkout page.

Note. Stop List module can be enabled via the 'Modules' section of the admin interface.

To access the 'Stop list' section, click on **Stop list** in the Management menu.

Before you enter any IP addresses to the Stop list, it is empty.

Picture 1: Stop list (empty).

To add a new IP address to the list, click on **Add IP address** in the section menu. The 'Add IP address' form will appear.

Picture 2: Add IP address form.
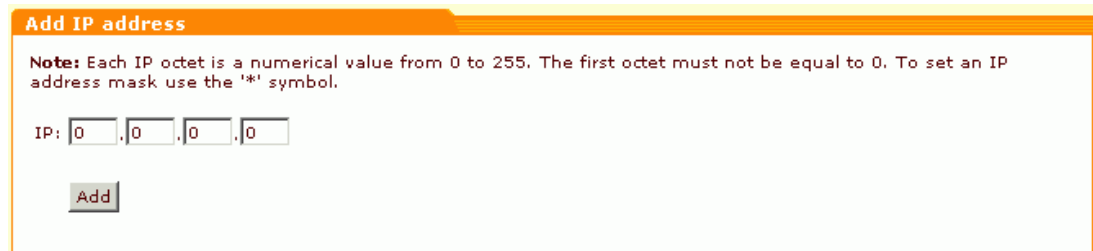
Enter the necessary IP address into the provided form. Click on **Add**. The new IP address will appear in the Stop list.

Picture 3: Stop list.

From now on, access to checkout from this IP addresses is denied. The **REASON** column displays the reason why this address was included into the Stop list. The **DATE** column shows when the address was included into the Stop list. More IP addresses can be added to the list at any time.

To delete an IP address from the list, select the check box next to it and click on **Delete selected**. You can select or unselect all the check boxes by clicking on the **Check all / Uncheck all** links.

If Antifraud module is activated, **DETAILS** column appears in the 'Stop list' form.

Picture 4: Details column.

Clicking the '**>>**' link in the **DETAILS** column opens a new window containing the 'Lookup address' dialog that allows you to find out information about the IP address (City, State, Country, Postal code) from Antifraud service.
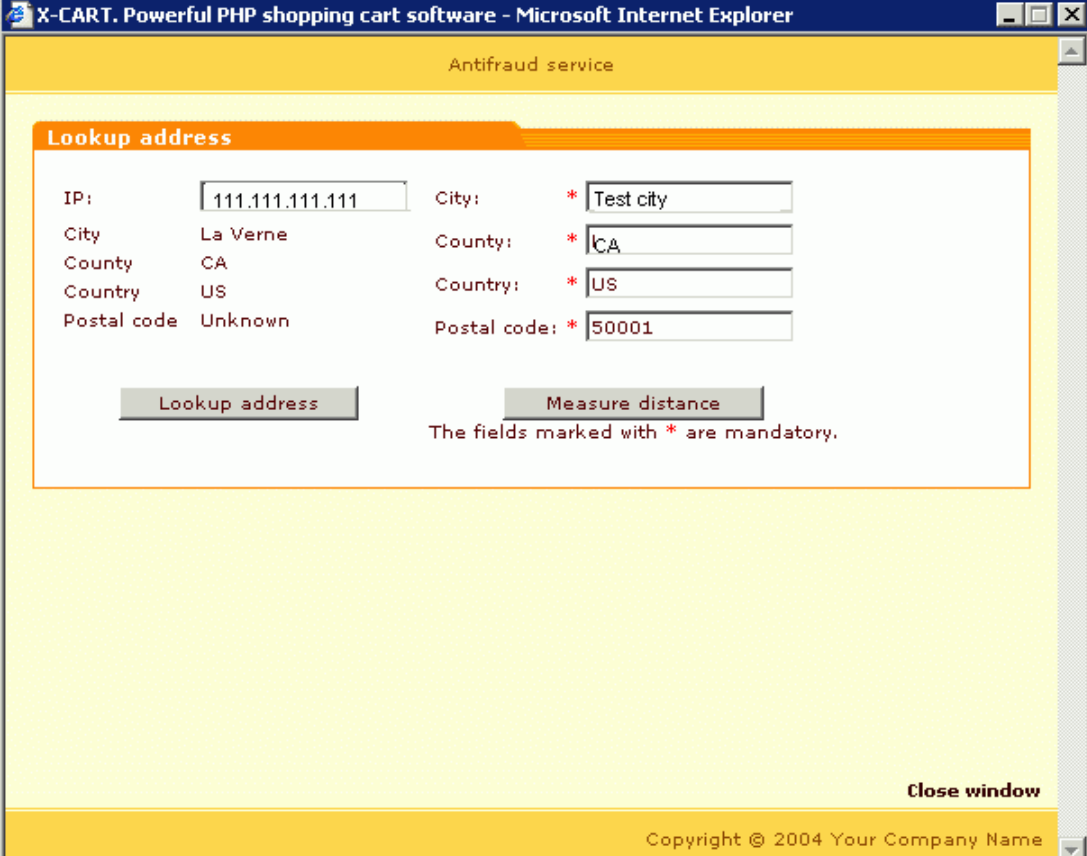
Picture 5: Lookup address dialog.
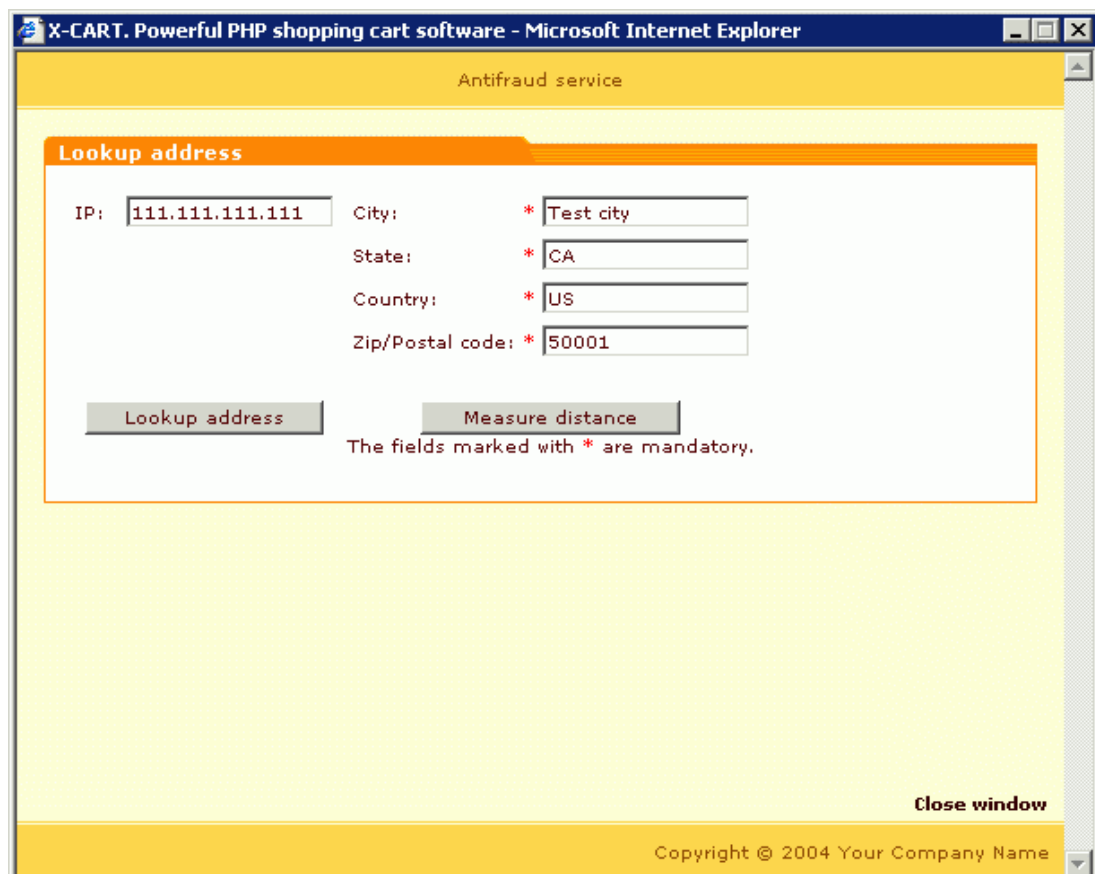
The 'City', 'State', 'Country' and 'Zip/Postal code' fields in the 'Lookup address' dialog show you the company address set under General settings/Company options. If necessary, you can enter a different address into these fields (for example, the address provided by the customer as his billing address).

The 'IP' field shows the IP address of your customer. Clicking on the **Lookup address** button allows you to get Antifraud service to find out the factual location of this IP address. The customer's address received from Antifraud service appears below the 'IP' field.

Picture 6: *IP address location has been found out.*

Clicking on **Measure distance** allows you to get information about the distance between the location of the IP address of your customer and your company address (or any other known address, specified in the right side of the form).

Picture 7: *Distance between the IP address location and your company address has been measured.*
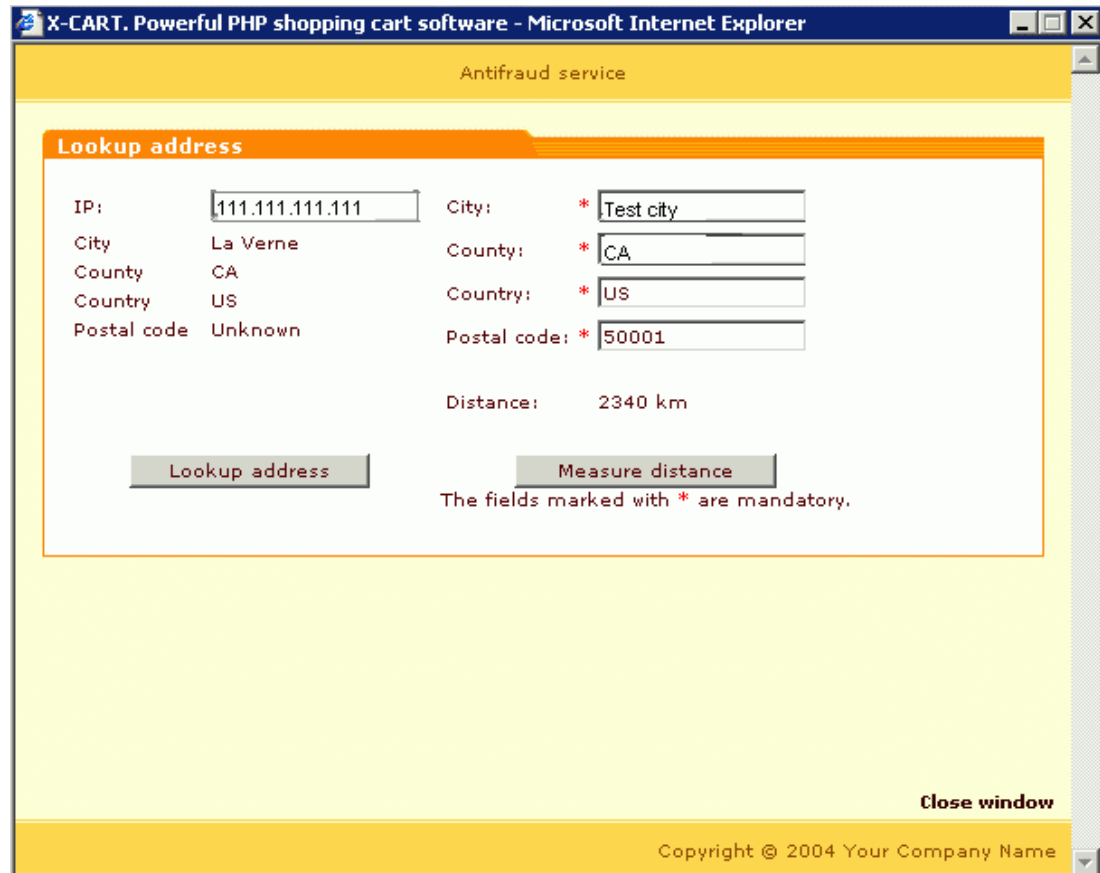
Related topics:

[Selecting Modules](#)

[Antifraud module](#)

6.3.19   Managing Gift Certificates

If you have Gift Certificates module enabled, you can sell Gift Certificates to your customers.

Note. Gift Certificates module can be enabled through the [Administration menu -> Modules](#).

A Gift Certificate can be used as a payment method, so if a customer purchases a GC at your store for another person, this other person will be able to pay for an order at your store using this GC. Any order containing products can be paid for by a GC (fully - if the GC amount equals or exceeds the sum of the order, or partially - if the amount of the GC is smaller than the sum of the order it is used to pay for). Orders containing just Gift Certificates (no products) cannot be paid for by a Gift Certificate.

The Gift Certificates section of administrator interface allows you to manage Gift Certificates ordered by your customers. You can access it by clicking on **Gift certificates** in the Management menu.

The 'Gift Certificates' form in this section lists Gift Certificates ordered by your customers.

Note. Expired Gift Certificates are not shown in the list by default. If you want all existing Gift Certificates to be shown, enable '**Show expired gift certificates**' option under General Settings -> Modules Options.

Picture 1: Gift certificates.

When your customer orders a Gift Certificate a new Gift Certificate is created with a unique ID (A person who wishes to pay for his order by a GC needs to enter this ID into the Gift Certificate information section of the 'Payment details' form). Unique IDs of the ordered Gift Certificates are shown in the **GIFTCERT ID** column. Clicking on the ID of a Gift Certificate displays the GC details.

The **ORDER** column shows the number of the order in which the Gift Certificate was ordered.

The value displayed in the **TYPE** column signifies wether the Gift Certificate will be sent to the recipient by e-mail or by mail. If you want to send Gift Certificates by snail mail, enable your customers to choose this option by checking General settings -> Modules options -> Enable posting Gift Certificates by mail.

The current status of a Gift Certificate can be found out by looking at the **STATUS** column. If needed, you can update the status of a Certificate by selecting a new value from the drop-down box and clicking on **Update**. As soon as a GC is ordered, it automatically gets the status '*Pending*'. After the status of the order by which the GC was ordered becomes '*Processed*', the status of the GC is automatically updated to '*Active*' (Please note that Gift Certificates cannot be used to pay for products until they are activated! If the order is not supposed to be '*Processed*', but you need to enable the GC owner to use the GC, you can activate the Certificate manually by selecting '*Active*' from the drop-down box). Besides these two values there can be other statuses: '*Blocked*', '*Disabled*', '*Expired*' and '*Used*'. A Certificate gets the status '*Blocked*' after it was used to pay for an order for the period of time specified in General settings -> Modules options -> Gift Certificate blocking period. This prevents multiple usage of the same Gift Certificate. '*Disabled*' can be used to temporarily disable a Gift Certificate. Gift Certificates with

the statuses '*Expired*' or '*Used*' cannot be used to make orders.

The column **REM./AMOUNT** shows two values for each of your Gift Certificates. The first one shows how much money remains on the certificate and can still be used to pay for orders. The second one shows the total amount of the GC at the time when it was purchased. The store administrator can set the minimum and maximum allowed amounts of money for which Gift Certificates can be purchased at his store (General settings -> Modules options -> Minimum (Maximum) GC value)

The column **ADDED** shows the date and time when a GC was added and the name of the person who added it. You can view the profile details of the person who added a GC by clicking on the name link.

If necessary, you can create Gift Certificates directly from the admin zone of your store:

1. Click on the **Add new** button in the Gift Certificates form. The 'Gift Certificate details' form will be opened.

   Picture 2: Gift Certificate details.

2. Complete the 'Gift Certificates details' form. The fields marked by the red asterisk (*) sign are mandatory for completion.
3. Click on the **Create Gift Certificate** link at the bottom of the form. The newly created Gift Certificate will be added to the list of Gift Certificates with the status 'Pending'. Set the status

of the Gift Certificate to 'Active' so it can be used to pay for products.

You can use General settings -> Email notifications options to define what notifications should be sent in connection with Gift certificates being purchased.

The look of Gift certificate notifications sent to the orders department and to the Gift certificate purchaser is defined by these templates:

```
mail/giftcert_notification.tpl

    mail/mail_header.tpl

    mail/giftcert.tpl

    mail/signature.tpl

mail/giftcert_notification_subj.tpl
```

For HTML mail:

```
mail/html/giftcert_notification.tpl

    mail/html/mail_header.tpl

    mail/html/giftcert.tpl

    mail/html/signature.tpl
```

The look of the Gift certificate notification sent to the Gift certificate recipient is defined by these templates:

```
mail/giftcert.tpl

    mail/mail_header.tpl

    currency.tpl

    mail/signature.tpl

mail/giftcert_subj.tpl
```

For HTML mail:

```
mail/html/giftcert.tpl

    mail/html/mail_header.tpl

    currency.tpl

    mail/html/signature.tpl
```

Related topics:

Selecting Modules

Modules Options

6.3.20   Managing Subscriptions

If you want to allow your customers to subscribe to some products, you should enable Subscriptions module through the <u>Administration</u> <u>menu -> Modules</u>. After you define subscriptions for products that can be bought automatically on a regular basis and your customers start ordering subscriptions, you will probably need an interface that will help you manage your subscriptions. The 'Subscriptions Management' section of your store is what you need. It can be accessed by clicking on **Subscriptions** in the Management menu.

You can use the provided search form to find information about subscription orders. The search queries can be performed based on the ID of the subscription product, on the product title and/or on the customer login. To start the search enter the information pertaining to the subscription into the fields of the search form and click on **Search**. If you want to see all of your subscriptions, click on **List all** without providing any details.

Picture 1: Search form.

The search results will be displayed to you in a table in the 'Subscriptions' form. The Subscriptions table format is always shown to you at the top of the form.

Picture 2: Subscriptions form.

You can view the product details by clicking on the product link.

Clicking on the 'Next Pay Date' link allows you to define the next pay date.

Clicking on the user login link allows you to view/modify the user's profile details.

Clicking on the links in the **SUBSCRIPTION DATE** and **LAST PAID DATE** columns allows you to

view/modify subscription order details.

The **STATUS** column enables you to choose appropriate status for the subscription (*Active*, *Unsubscribed*, *Disabled*).

The **Charge** link allows you to collect subscription charges.

Related topics:

Selecting Modules

Defining Payment Methods

6.3.21 UPS OnLine Tools

If you want to use UPS real-time shipping rates calculation service, you need to enable **UPS OnLine ® Tools** module through the Administration menu -> Modules, register your UPS OnLine ® Tools with UPS and set up your store to work with this real-time calculation service.

After you enable the module, **UPS OnLine ® Tools** item appears in the Management menu of the admin zone. Click on it to access UPS Online ® Tools Main page. If you haven't registered your UPS OnLine ® Tools yet, you will be asked to complete the licensing and registration process. Click on the **Register** button to proceed.

Picture 1: UPS Online ® Tools - Main page.
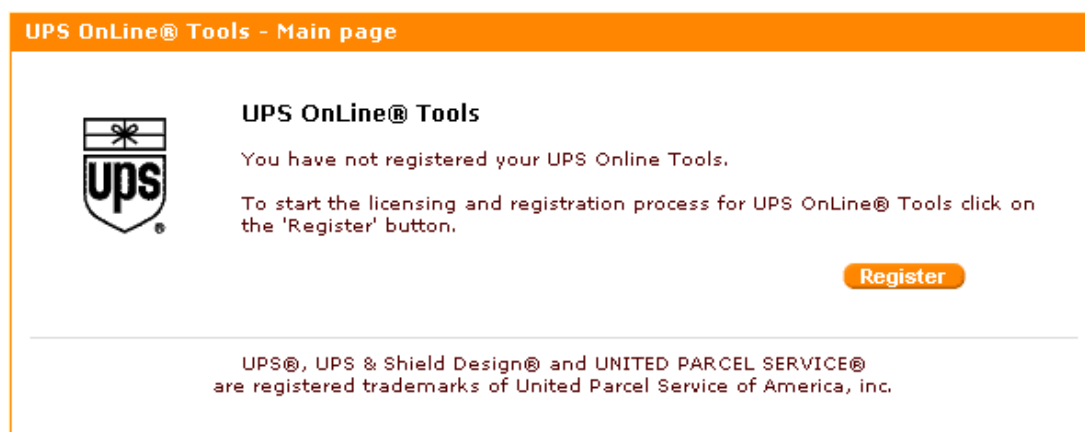
UPS Online ® Tools Licensing & Registration Wizard will be launched that will walk you through all the steps of the registration process. At Step 1 you will be asked to confirm your intention to proceed with the registration.

Picture 2: UPS Online ® Tools Licensing & Registration Wizard - Step 1.
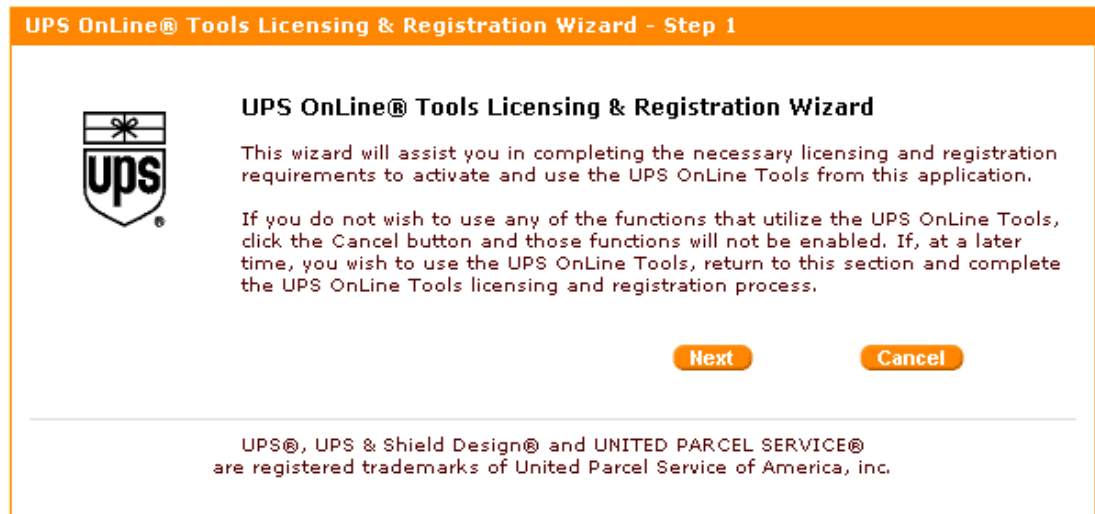
If you do not want to continue with registering UPS Online ® Tools now, click on **Cancel**. Otherwise click on **Next**.

At Step 2 you will be asked to read the terms and conditions of the Agreement with UPS Internet Services, Inc.('UPS').

Picture 3: UPS Online ® Tools Licensing & Registration Wizard - Step 2.

If you agree to be bound by the terms and conditions of this Agreement, select **Yes, I Do Agree** and click on **Next**. If you do not agree, select **No, I Do Not Agree** (in this case you will not be able to register and use UPS Online ® Tools).

At Step 3 you will be supposed to provide your registration information. The address you provided in General settings -> Company options is automatically entered into the registration form. However, you can provide a different address and contact info (manually or using the **Fill From Profile** button).

Picture 4: UPS Online ® Tools Licensing & Registration Wizard - Step 3.

Make sure you have completed all the fields and entered your valid e-mail address before you click on **Next**.

Step 4 informs you of the successful completion of the registration process.

Picture 5: UPS Online ® Tools Licensing & Registration Wizard - Step 4.

Click on **Finish** to go to UPS Online ® Tools Main page.

This time the Main page will look something like this:

> **Picture 6:** *UPS Online ® Tools - Main page.*

You can click on **Configure** to configure your UPS Online ® Tools. Clicking on **Register** allows you to run the licensing and registration wizard again.

If you click on **Configure**, you get access to UPS Online ® Tools Rates & Service Selection page.

Note. 'Real-time shipping calculation' must be enabled and 'Intershipper calculation services' must be disabled in General settings -> Shipping options section. If you get a warning in red, you need to correct your store settings.

> **Picture 7:** *UPS Online ® Tools Rates & Service Selection.*

UPS Online ® Tools Rates & Services Selection page allows you to provide the necessary details for Rates & Service Selection OnLine Tool and Address Validation OnLine Tool.

Picture 8: *UPS Online ® Tools Rates & Service Selection.*

1. Select your merchant account type. UPS has several classifications based on your account-type choice:

> *Daily Pickup* - a UPS driver will come to your location every day (weekly service charge

applies).

Occasional Shipper - It is the responsibility of the merchant to drop the package into the UPS System.

Suggested Retail Rate - Paying for the shipments at the UPS Store (Label is actually created by the UPS Store).

2. Select the necessary packaging type.
3. Specify the size of your package.
4. Select one or more service options (press and hold Ctrl while clicking your mouse to select multiple options).
5. Enter package insured value in cents.
6. Select insured value currency.
7. Enter shipping cost conversion rate.
8. Find out what it says in the 'Shipping cost currency' line. The currency code that is returned by UPS is defined automatically when a request for getting the shipping rates is successfully performed. If you see 'Unknown' instead of a currency code in this line, this request has not been performed yet - so you need to request the shipping rates. To do so, click on the **Test** button in the lower part of the form, complete the Test destination shipping address form and click on **Submit**.

Picture 9: Test destination shipping address form.

After this test run the currency code will be appear in the 'Shipping cost currency' line.

9. If you want to use UPS test server first, select the appropriate check box.

Picture 10: UPS Online ® Tools Rates & Services Selection.

10. Select Address Validation status (*Enabled* or *Disabled*).
11. Select Address Validation quality (*Exact match*, *Very close match*, *Close match*, *Possible match*, *Poor match*)
12. Click on **Update**.
13. To test the Rates & Service Selection and Address Validation Tools click on the **Test** button.
14. To go to the UPS OnLine® Tools main page click on the **Main page** button.

Note. UPS module requires EXPAT extension for php and an HTTPS request system like Net: SLeay, libCURL, CURL, Open SSL or HTTPS-cli. Open the Summary page through the Administration menu in the admin area and make sure the necessary components are installed on your system. If you select the Net:SLeay perl module as your preferred HTTPS module, you should specify the full path to Perl interpreter executable in General settings -> General options.

Related topics:

Defining Shipping Methods

Shipping Options

6.4 Administration

6.4.1 Summary Page (Administrator)

Summary page provides general information about the current status of the online store. Besides, the administrator can use this page to delete redundant data (tracking statistics, templates cache etc)

Note. Crucial information is displayed in bold red font.

The first section of the Summary page provides license information. Here you can find out your AUTH code, view the software license agreement and check the status of your license.

Picture 1: *License info.*

Your AUTH code for re-installing skins and installing modules is: %**LICENSE**%

LICENSE INFO

X-Cart Copyright (c) 2001-2004 Ruslan R. Fazliev <rrf@rrf.ru>

By using the software you agree to the terms of the following software license agreement:

http://www.x-cart.com/software_license_agreement.html

Using the software without purchasing a valid license from the copyright owner is prohibited by international copyright law. You can check your license status here:

http://www.x-cart.com/verify_license.html

General info section contains information about the current status of the online store. Here you can see when your database was last backed up, view orders statistics, find out which shipping methods are enabled, how many shipping rates are defined for them and other useful data.

Picture 2: *General info.*

GENERAL INFO

Single mode is **enabled**
The online store is currently **enabled** for customers.
The database has never been backed up!   click here to backup >>

Orders info   click here for details >>

STATUS	SINCE THE LAST LOG IN	TODAY	THIS WEEK	THIS MONTH
Processed:	0	0	0	0
Failed/Declined:	0	0	0	0
Not finished:	0	0	0	0
Queued:	0	0	0	0

Shipping methods info   click here to define >>
You have enabled 88 shipping method(s):

CARRIER	METHODS ENABLED
AirNet Express	1
ARB	5
CPC	17
DHL	2
Emery Worldwide	3
FedEx	15
UPS	24
U.S.P.S.	21

Shipping rates info   (Only providers are able to define this)
You have no shipping rates defined!
Real time shipping rates calculation is **disabled**

Payment methods info section lists payment methods and their statuses.

Picture 3: *Payment methods info.*

PAYMENT METHODS INFO

Each payment method has its own requirements. X-Cart can now hide disfunctional payment methods (select "Hide disfunctional payment methods" option in **General settings**).

Payment methods info:

PAYMENT METHOD	STATUS
Credit Card	OK
Check	OK
PayPal	OK
Gift Certificate	OK
Phone Ordering	OK
Fax Ordering	OK
Money Order	OK
C.O.D	OK
Purchase Order	OK
NOCHEX	OK
Personal Check	OK
Business Check	OK
Wire Transfer	OK
Government Check	OK
Traveler's Check	OK

Environment components info section gives you the information about the version of your X-Cart and some useful information about the environment in which X-Cart works (PHP info, Perl version, Server info, etc)

Picture 4: *Environment components info.*

Environment components info:

COMPONENT	STATUS	
X-Cart version	4.0.3	
X-Cart directory	/u/max/public_html/eshop_dohtur	
PHP	4.3.6	Details >>
MySQL server	3.23.58	
MySQL client	3.23.58	
Web server	Apache/1.3.29 (Unix) PHP/4.3.6 mod_ssl/2.8.16 OpenSSL/0.9.7d	
Operation system	FreeBSD	
Perl	5.006001	Details >>
XML parser (expat)	1.95.6	
HTTPS MODULES		
Net::SSLeay	1.25	
libCURL	libcurl/7.11.1 OpenSSL/0.9.7d ipv6 zlib/1.1.4	Active >>
CURL executable	curl 7.11.1 (i386-portbld-freebsd5.2.1) libcurl/7.11.1 OpenSSL/0.9.7d ipv6 zlib/1.1.4	
OpenSSL executable	OpenSSL 0.9.7c-p1 30 Sep 2003	
HTTPS-cli executable	not found	
MODULES FOR THE PAYMENT METHODS		
VeriSign PayFlow Pro client	/u/max/public_html/eshop_dohtur/payment/bin/pfpro L305	
PayBox client	not found	
Saferpay client	not found	
TrustCommerce (tclink.so)	not found	

Clicking the **Active >>** link in the HTTPS MODULES subsection opens a new window that allows you to test the HTTPS module which is currently active.

> **Picture 5:** *Active HTTPS module test page.*
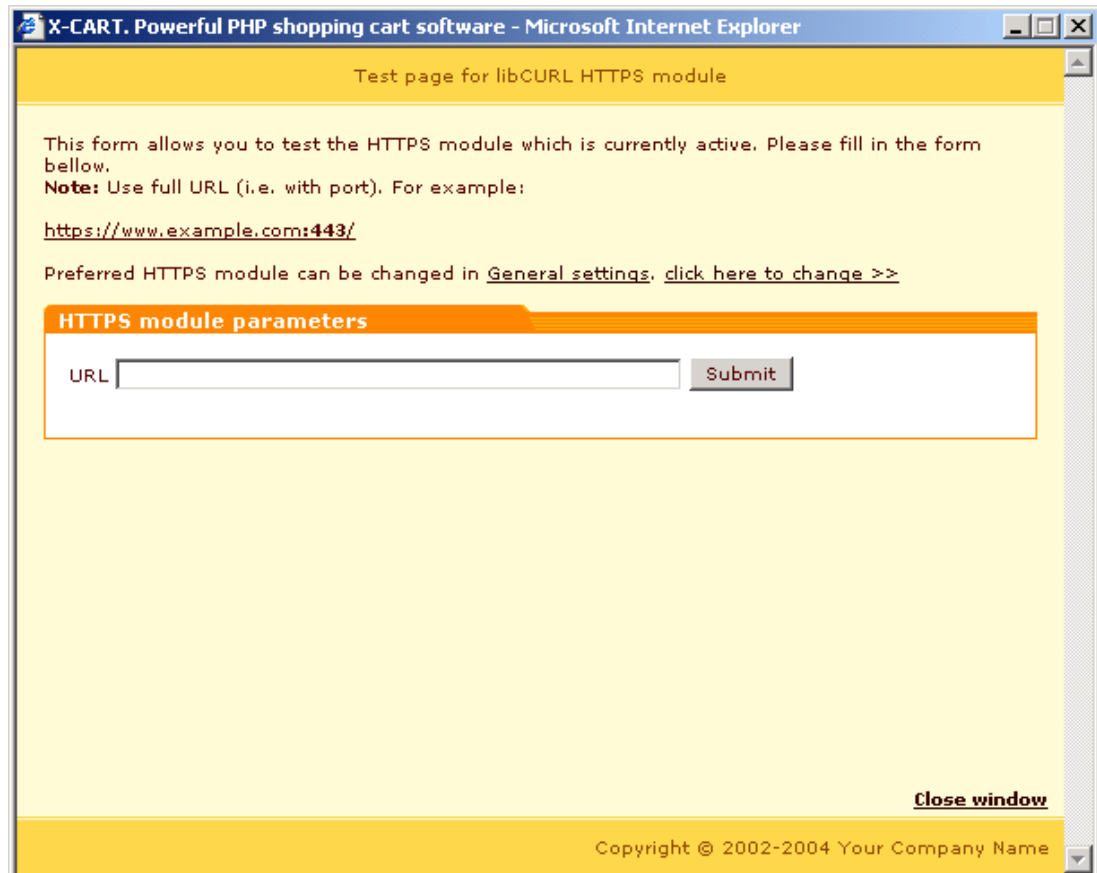
You can use the 'HTTPS module parameters' form to provide your full HTTPS URL (including port) and click on **Submit**.

The 'HTTPS module response' form will demonstrate the results of testing the work of the module. If something is incorrect, you will be informed of an error.

Picture 6: *Active HTTPS module test page.*
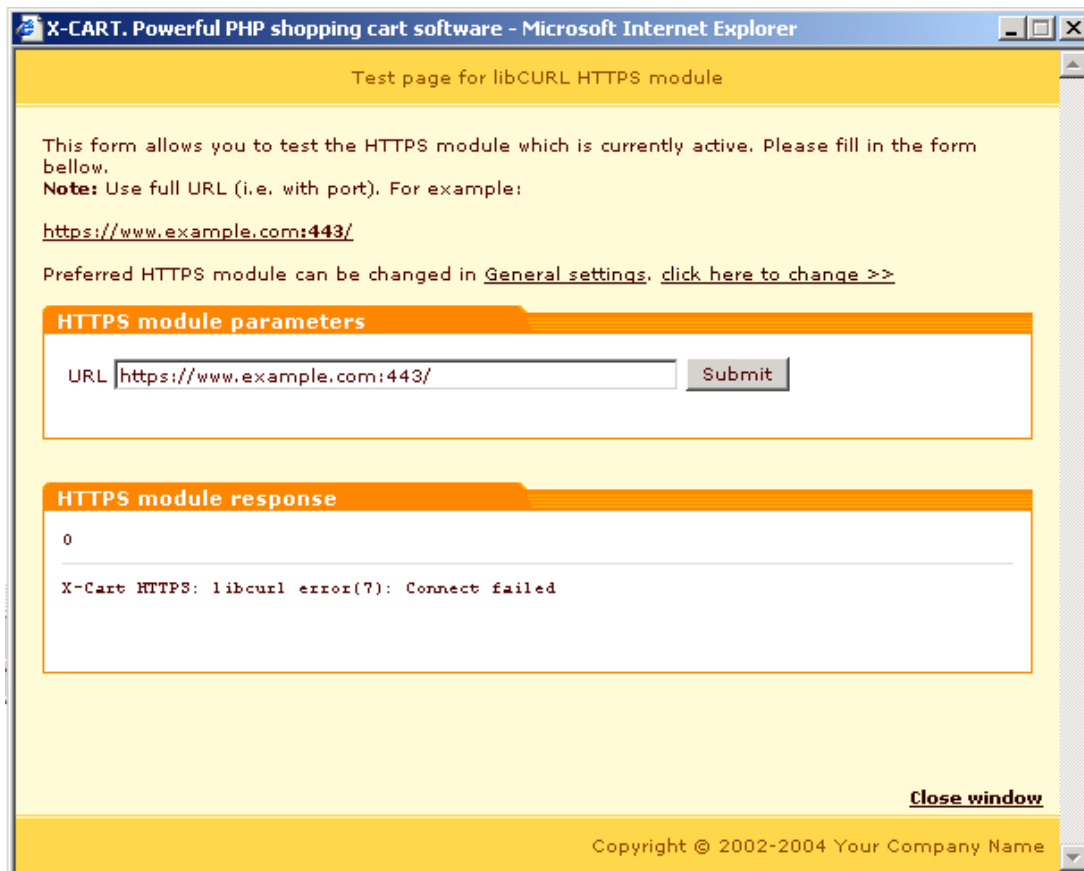
The next section of the Summary page shows the list of X-Cart directories which must have write permissions.

Picture 7: X-Cart directories which must have write permissions.

Statistics clearing allows you to delete redundant statistical data from the database.

Picture 8: Statistics clearing

STATISTICS CLEARING

☐ Clear all tracking statistics

☐ Clear all store statistics

☐ Clear all referrals statistics

☐ Clear all visitors enviroment statistics

[Apply]

Note: Please be careful when clearing statistics, this operation is irreversible.

Clear templates cache section allows you to delete precompiled Smarty templates from the directory 'templates_c'

Picture 9: Clear templates cache.

CLEAR TEMPLATES CACHE

[Clear]

Note: The directory '/u/svowl/public_html/eshop_dohtur/templates_c' contains many precompiled Smarty-templates. If you want to remove them and free some disk space, click on the button above.

This directory now contains 431 files that take up 2 Mbytes.

Credit card information removal section allows you to remove credit card info from customers' profiles and/or from completed and processed orders.

Picture 10: Credit card information removal.

CREDIT CARD INFORMATION REMOVAL

☐ Remove from customers' profiles

☐ Remove from completed and processed orders

[Apply]

Note: Please be careful when removing credit card information, this operation is irreversible.

Note. Do not forget to clear statistics before you start your real online store to get rid of the statistical data gathered at the time of testing.

Related topics:

Licensing

Database Backup/Restore

6.4.2   Database Backup/Restore

It is recommended to regularly back up your X-Cart store database. You do not need to have much knowledge in mysql database administration to make database backup copies or to restore the database. X-Cart shopping cart software provides you with a convenient tool making database backup/restoration as easy as a few clicks.

To make a database backup copy:

1. Click on **DB Backup/Restore** in the Administration Menu. The 'Database Backup/Restore' form will appear.

   Picture 1: *Database backup and restore form.*

2. Refer to the 'Backup database' subsection. Do one of the following:

   • Save the file on your local computer (Click on **Generate SQL file**, the save file window will appear. Choose the name for the SQL file and the location to which your backup file should be saved. Click on **Save**).

   • Save the file on the server (Select the check box offering to save your backup file to xcart/log/xcartdump.sql, click on **Generate SQL file**). This may be convenient if your database is very large and you prefer to download it later using your FTP

client.

The generated backup file can be used at any time later on to restore your database.

To restore the database from an SQL file:

1. Click on **DB Backup/Restore** in the Administration Menu. The Database Backup/Restore form will appear.
2. Refer to the 'Restore database' subsection.

   - If you have a backup file which is located on your local machine and which you want to use for database restoration, click on **Browse**, use the 'Select file' window to locate the SQL file, click on **Open**. Click on **Restore from file**.
     Picture 2: 'Restore database' subsection of the 'Database Backup /Restore' form.

   - If you have the file **xcartdump.sql** located inside **xcart/log/** directory on the server, which you want to use for database restoration, the 'Restore database' subsection displays **Restore** button. Click on this button to restore your database.

     Note. If the button is not displayed in the 'Restore database' subsection, make sure the file xcartdump.sql is inside xcart/log/ directory.
     Picture 3: 'Restore database' subsection of the 'Database Backup /Restore' form.

Note. When you restore the database all existing tables are overwritten. Always make a backup copy before restoring the database.

Note. The database backups of different X-Cart versions are not compatible.

Related topics:

6.4.3   Setting Up Membership Levels

X-Cart shopping cart software makes it possible for you to define various membership levels for the customers, providers and administrators of your store. Membership levels for customers are commonly used in marketing to attract and stimulate customers to register with your shop and buy more. Customers can sign up for a desired membership level using their 'Profile details' form. They need to be approved by the store admin to actually get this level. Membership levels for administrators and providers are used to control access permissions for different groups of administrators and providers. Special membership levels for administrators and providers are also granted by the admin.

When you install X-Cart it already has several built-in membership levels:

1. For customers:
   - **Premium** - You can use this level for advertising purposes. Encourage your customers to sign up for Premium membership by offering some special savings or products.
   - **Wholesale** - Use this membership level for your wholesale customers. Please refer to the topic [Advanced](#) [Product Management->Setting Wholesale Prices](#) in the 'Managing Products and Orders (Provider)' section of this manual for information about setting up wholesale prices.

2. For providers:
   - **Root provider** - This type of provider can view/delete/modify products of all the providers, but he cannot see their order details.

3. For administrators:
   - **Fulfillment staff** - This type of administrator has access only to the statistics and orders.

If necessary, these membership levels can be renamed or deleted.

Note. Fulfillment staff membership level in X-Cart GOLD cannot be renamed or deleted.

You can also define custom membership levels for your store.

To define a new membership level:

1. Click on **Membership levels** in the Administration menu. Choose the appropriate 'Membership levels' form (customer, provider or admin).
2. Enter the new membership level name into the field next to the **Add new** button.
3. Click on **Add new**.

To rename a membership level:

1. Click on **Membership levels** in the Administration menu. Find in one of the 'Membership levels' forms the name of the membership level that you would like to change.
2. Change the membership level name.
3. Click on **Update**.

To delete a membership level:

1. Click on **Membership levels** in the Administration menu. Find in one of the 'Membership levels' forms the name of the membership level that you would like to delete.
2. Select the check box next to the name of the membership level you want to delete.
3. Click on **Delete selected**.

Related topics:

Managing User Profiles

X-Cart Gold and Pro

X-Cart Accounts

6.4.4   Editing Credit Card Types

X-Cart shopping cart software allows you to define the credit card types that your store will be able to accept. This is done in the 'Edit Credit Card Types' section that can be accessed by clicking on **Credit card types** in the Administration menu. In this section you can create, modify and delete card types. Please refer to the check_cc_number_script.tpl file to find out if JavaScript validation is supported for a specific card type.

Picture 1: *Edit Credit Card Types form.*

To add a credit card type:

1. In the 'Add credit card type' subsection of the 'Edit Credit Card Types' form enter the card code and the card type.
2. If the new credit card type requires CVV2, select the appropriate check box.
3. Click on **Add new**.

To update a credit card type:

1. In the 'Edit Credit Card Types' form find the card type you would like to update.
2. Change the necessary details.
3. Click on **Update**.

To delete a credit card type:

1. In the 'Edit Credit Card Types' form find the card type you would like to delete.

2. Select the check box next to this credit card type. Use the **Check all** / **Uncheck all** links to select/unselect all the boxes.

3. Click on **Delete selected**.

Related topics:

[Defining](#) [Payment Methods](#)

6.4.5 Working With Files

You can use the X-Cart file manager to upload files to the server. All the files will be located in the folder *www.yourstore.com/xcartdir/*files/*yourloginname/.* Afterwards you can use these files in your store, for example if you sell DVD's you can upload a movie trailer into the file section, add an extra field to the product table and enter the link to the trailer in the extra field.

To create a new directory:
1. Click on **Files** in the Inventory menu, the 'Browse files' form will appear.

Picture 1: *Browse files form.*

2. If you want to create a new sub-directory, click on the name of the directory in which you

want the new sub-directory to be located.

3. Enter the name of the sub-directory you want to create in the 'New directory name' field.

4. Click on **Create**. The sub-directory will be created.

To create a copy of a file:

1. On the 'Browse files' form select the file you want to copy (for example, "`Sample.jpg`").

2. Enter the name of the file copy you want to create (for example, "`Sample_copy.jpg`") in the 'Copy file name' field.

3. Click on **Copy**. The copy will be created.

To delete a file or a directory:

1. Select the radio button of the file you are going to delete.

2. Click on **Delete selected**. The confirmation window will open.

3. Click on **OK** to confirm, or **Cancel** to cancel the deletion.

Note. When you delete a directory all the files and sub-directories under that directory are deleted.

To upload a file from the local computer:

1. Click on **Browse** on the 'Browse file' form, the 'Select file' window will appear.

2. Locate the file and click on **Open**.

3. Click on **Upload**.

Note. If a file with the same name already exists in the selected directory and you want it to be replaced by the file you are going to upload, select the 'Replace file if exists' check box.

Related topics:

Editing Templates

Managing Images Location

6.4.6 General Settings

6.4.6.1 General Settings

General settings enable you to set global options for your store. To access this section, click on **General settings** in the Administration menu. All options are divided into several sections. Use the section menu on top of the General Settings page to switch between the different sections.

Click on the links below to learn more about each section:

- Appearance options
- 3-D Secure Transaction options
- Company options
- Contact us form options
- Email options
- Email notifications options
- Fancy categories options
- General options
- Gift Registry options
- GnuPG options
- Interneka options
- Modules options
- PGP options
- QuickBooks options
- Product search options
- Security options
- SEO options
- Shipping options
- Stop list options
- User Profiles options
- XAffiliate options

6.4.6.2   Appearance Options

You can configure the appearance of your X-Cart through **General settings** -> **Appearance options**.

To set Appearance options:

1. Click on **General settings** in the Administration menu, select **Appearance options** from the section menu.

2. Fill out the fields below according to your preferences:

   • **Newsletter limit to show:** Enter the number of newsletters shown per page.

   • **Products per page:** Enter the maximum number of products you want to be displayed on a page when a customer looks into a category or a subcategory. Do not set large numbers because it will take too long for the page to load.

   • **Products per page (admin):** Enter the maximum number of products you want to be displayed per page in the Search results in admin/provider zone.

   • **Orders per page (admin):** Enter the maximum number of orders you want to be displayed per page in the Search results in admin/provider zone.

   • **Users per page (admin):** Enter the maximum number of users you want to be displayed per page in the Search results in admin zone.

   • **Maximum navigation pages:** Set the maximum number of navigation pages to be displayed in the navigation bar.

   • **Show quantity in stock:** If enabled, customers will be able to see the quantity of a product in stock.

   • **Maximum number of selections in quantity selectbox:** Controls the maximum product quantity your customer can add to the shopping cart.

   • **Show thumbnails in products list:** If you want your pages to be loaded faster you can disable thumbnails in the products list. However, keep in mind that product thumbnails facilitate the process of finding the necessary product and are often the first thing your customers pay attention to.

   • **Select the order to sort products within a category:** Select the order according to which the products will be sorted within a category.

   • **Show the number of products in categories:** If selected, the customers can see the number of products in the categories.

   • **Enable "Buy Now" button in the products list:** If selected, the customers can add a product to the shopping cart directly from the products list without going to the detailed view page.

   • **Display products list in multiple columns (1-3) (leave empty to use standard format):** Define the format of the products list. Specify the necessary number of columns (from 1 to 3) or leave the field empty to use the standard format.

- **Display only featured products list in multicolumn format:** If selected, only featured products will be displayed in multicolumn format. This option is selected by default, so if you want the products within categories to be displayed in multiple columns, be sure to unselect this check box.

- **Thumbnail width in the products list:** Define the width of the thumbnails displayed in the products list.

- **Select date format:** Select date format for your site.

- **Select time format:** Select time format for your site.

- **Display costs for all the shipping methods:** If selected, the expected shipping cost will be displayed next to the name of each shipping method in the drop-down list in the shopping cart.

- **Display detailed cart totals information:** (*On all checkout pages*, *On the last checkout page only*, *Never*) Use the drop-down box to specify where you would like detailed cart totals information to be displayed.

- **Allow to update product quantity on the checkout pages:** If selected, your customers will be able to change the quantity of a product placed in the shopping cart after the process of checkout has begun.

- **Print order invoices on separate pages:** If selected, every invoice will be printed on a separate page. Otherwise you will be able to print multiple invoices consecutively on the same page.

- **Enable printable version of categories and products pages in customer area:** If selected, printable version of categories and products pages will be available to your customers.

- **A customer using the "Buy now" button to order a product with product options must be redirected to the product details:** If selected, a customer who clicks on "Buy now" will be redirected to the product details page (from which he will be able to add the product to his cart). If unchecked, after clicking on "Buy now" the customer will get directly to his shopping cart where he will find one item of the product added.

3. Click on the **Save** button to apply the changes.

Related topics:

General Settings

Managing Your News

Managing User Profiles

6.4.6.3   3-D Secure Transaction options

X-Cart features integration with Cardinal Centinel® payment authentication platform

(CardinalCommerce Corp.) designed to secure electronic commerce by providing consumers, merchants, credit/debit card issuers and processors the ability to conduct fully authenticated electronic payment transactions and to access confidential information safely, securely and privately. It helps minimize fraud and merchant charge-backs which are so damaging to both customers and your online business. X-Cart supports 3-D secure transactions with the following credit card processors: *AuthorizeNet: AIM*, *USAePay*, *Netbilling*, *eSelect plus*, *Protx VSP Direct* and *PSiGate XML interface*.

To be able to use this mechanism, you must first register with CardinalCommerce. Registration is available at the following web page: https://billing.cardinalcommerce.com/centinel/registration/xcart_landing.asp.

For more information, visit http://www.cardinalcommerce.com.

To set 3-D Secure Transaction options:

1. Click on **General settings** in the Administration menu, select **3-D Secure Transaction options** from the section menu.
2. Set **3-D Secure Transaction options** options.

   • **Use Cardinal Centinel® for 3-D Secure Payer Authentication:** Select this check box to enable 3-D Secure Transaction functionality.

   • **Current currency:** Specify the currency your online store uses to conduct transactions.

   • **ProcessorID:** Enter the value provided to your store at registration with CardinalCommerce.

   • **MerchantID:** Enter the value provided to your store at registration with CardinalCommerce.

   • **TransactionURL:** Enter the URL provided to your store at registration with CardinalCommerce.

3. Click on **Save** to apply the changes.

Note. Configuration pages of the credit card processors that support 3-D Secure Transaction authentication contain the following message:

Supports 3-D Secure Payer Authentication.
Go to **3-D Secure Transaction options** to enable it.

Note. Make sure the **Preferred HTTPS module** is configured on your system and the settings are correct (You can check it using Administration menu > Summary > Environment Info). Please refer to the 'General Settings > General Options' section of this manual for more information.

Related topics:

6.4.6.4   Company Options

Choosing **General settings -> Company options** allows you to provide your company contact information (company name, address, phone, fax, email, etc) which will be displayed on the storefront and included in notification e-mails sent to your customers. This information will be used by your customers to contact your store and will be considered in real time shipping calculations.

To set company options:
1. Click on **General settings** in the Administration menu, select **Company options** from the section menu.
2. Enter the following information about your company:

   • **Company name**: Enter your company name. The real name of your company will appear everywhere on the site instead of 'Your Company Name'.

   • **Company website**: Enter the address of your company website.

   • **Company phone:** Enter the phone number your customers could use to contact your company.

   • **Company phone 2:** Enter an alternative phone number.

   • **Company fax:** Enter your company fax number.

   • **Company address**: Enter your company street address.

   • **Company city**: Enter the city in which your company is located.

   • **Company state**: Select the state in which your company is located.

   • **Company zip/postal code**: Enter your company zip/postal code.

   • **Company country**: Select the country in which your company is located.

   • **Users department e-mail address**: Enter the e-mail address of your users department.

   • **Site administrator e-mail address**: Enter the e-mail address of your site administrator.

   • **Orders department e-mail address**: Enter the e-mail address of your orders department.

   • **Help/Support department e-mail address**: Enter the e-mail address of your help and support department.

   • **Reply-To newsletter email address**: Set the email address which will be used by your customers to reply to your newsletter email messages.

   • **Year when the store started its operation:** Enter the year when the store started its operation.
3. Click on **Save** to apply the changes.

Related topics:

[General Settings](#)

[Defining](#) [Shipping Methods](#)

[Managing Your](#) [News](#)

[Managing](#) [User Profiles](#)

6.4.6.5   Contact Us Form Options

Selecting **General settings ->Contact us form options** allows you to configure the 'Contact us' form fields.

To set 'Contact us' form options:

1. Click on **General settings** in the Administration menu, select **Contact us form options** from the section menu.

   Picture 1: *Contact us form options.*

2. Select the 'Active' check boxes opposite the names of the fields you want to be included into the 'Contact us' form (accessible via the Help menu on the customer front-end).
3. Select 'Required' for the fields you want to be mandatory for completion by customers. In the 'Contact us' form on the Customer front-end they will be marked with the red (*) asterisk sign.
4. Click on **Save** to apply the changes.
5. If you need to add any additional fields to the form:
   • Scroll down to the 'Add new field' section.

Picture 2: *'Add new field' section.*

- Enter a name for the field you want to add.

- Choose the type of the field from the drop-down box (*Text*, *Checkbox* or *Select box*)

- If you have chosen *Select box* type, provide variants for the select box (use the ';' symbol as a delimiter for your variants).

- Set up the 'Pos.' field to change the order in which the additional fields are sorted.

- Click on **Add/Update** to save the changes. The new field will be added to the list of fields in the 'Additional information' section. Select the 'Active' and/or 'Required' check box(es) opposite the newly added field if necessary.

Related topics:

General Settings

6.4.6.6 Email Options

This section is used to configure the options pertaining to email notifications and newsletters.

To set Email options:
1. Click on **General settings** in the Administration menu, select **Email options** from the section menu.
2. Set the following options:

- **Use internal PHP mailer for sending newsletters:** Select this check box if you want to use the internal PHP mailer instead of spam.pl script.

- **HTML mail:**   Enable this option if you want to send HTML e-mails.

- **Encode mail headers using "Base 64":** Enable this option to encode the subject of your message if necessary.

- **Include order details (credit card information) into admin order notification message (it is recommended to use PGP encryption with this option enabled):** If this option is

enabled admin will get your customers' credit card information with order notifications. PGP is recommended to secure your customers' privacy.

- **Include user password in e-mail notifications to the Users department:** Users' passwords will automatically be included into the e-mail notification.

- **Maximum string length field** allows you to set the maximum string length of the lines in the message body.

3. Click on **Save** to apply the changes.

Related topics:

[General](#) [Settings](#)

[Managing Your](#) [News](#)

6.4.6.7   Email Notifications Options

Selecting **General settings -> Email notifications** options enables you to edit all email notifications which you send to your customers.

1. Click on **General settings** in the Administration menu, select **Email notifications options** from the section menu.
2. Set the options below according to your preferences:

- **Enable email notifications for customers about initially placed orders:** If enabled, a customer gets a notification that his order has been initially placed and is under admin's consideration. This type of notification is sent to a customer when an online payment method is used (CC or Check processor). Technically this happens when the customer goes to an online processor to begin a payment transaction and the order gets the status "I" (Not finished) - the transaction is neither successful nor failed yet. To change the look of this notification, edit the following templates:

```
mail/init_order_customer.tpl
    mail/mail_header.tpl
    mail/signature.tpl
mail/init_order_customer_subj.tpl
```

If you want to use HTML mail, also edit these templates:

```
mail/html/init_order_customer.tpl
    mail/html/mail_header.tpl
    mail/html/signature.tpl
```

If you do not want notifications about the initial placement of orders to be sent, disable this option.

The notification which is sent when the order gets queued (Q) can be changed by editing the following templates:

```
mail/order_customer.tpl
  mail/mail_header.tpl
  mail/order_invoice.tpl
      main/order_status.tpl
      mail/order_data.tpl
  mail/signature.tpl
mail/order_customer_subj.tpl
```

If you want to use HTML mail, also edit these templates:

```
mail/html/order_customer.tpl
  mail/html/mail_header.tpl
  mail/html/order_invoice.tpl
      main/order_status.tpl
      mail/html/order_data.tpl
  mail/html/signature.tpl
```

- **Notify the site administrator by email if unallowed request to site occurs:** Select this check box if you want the store administrator to get an email notification if the system detects a potentially harmful GET or POST request to the store site which may be a sign of a hacker attack. This notification is a service message generated by X-Cart, it does not have a template which can be edited.

- **Enable email notifications for admin/provider about initially placed orders:** Select this check box if you want the store administrators/providers to get email notifications about initially placed orders.

    The look of notifications for administrators is defined by these templates:

```
mail/order_notification_admin.tpl
    mail/mail_header.tpl
    mail/order_invoice.tpl
        main/order_status.tpl
        mail/order_data.tpl
    mail/signature.tpl
mail/init_order_notification_subj.tpl
```

    For HTML mail:

```
mail/html/order_notification_admin.tpl
    mail/html/mail_header.tpl
    mail/html/order_invoice.tpl
        main/order_status.tpl
```

```
                    mail/html/order_data.tpl

              mail/html/signature.tpl
```

The look of notifications for providers is defined by these templates:

```
         mail/order_notification.tpl

              mail/mail_header.tpl

              mail/order_invoice.tpl

                    main/order_status.tpl

                    mail/order_data.tpl

              mail/signature.tpl

         mail/init_order_notification_subj.tpl
```

For HTML mail:

```
         mail/html/order_notification.tpl

              mail/html/mail_header.tpl

              mail/html/order_invoice.tpl

                    main/order_status.tpl

                    mail/html/order_data.tpl

              mail/html/signature.tpl
```

- **Send e-mail notifications about placed orders to providers who uploaded the purchased products (in addition to the orders department):** Select this check box to send notifications about the orders placed at the store to the providers who uploaded the products included into these orders. The look of such notification messages is defined by these templates:

```
         mail/order_notification.tpl

              mail/mail_header.tpl

              mail/order_invoice.tpl

                    main/order_status.tpl

                    mail/order_data.tpl

              mail/signature.tpl

         mail/init_order_notification_subj.tpl
```

For HTML mail:

```
         mail/html/order_notification.tpl

              mail/html/mail_header.tpl

              mail/html/order_invoice.tpl

                    main/order_status.tpl

                    mail/html/order_data.tpl
```

`mail/html/signature.tpl`

- **Notify the site administrator about SQL errors in the store by email:** If enabled, the site administrator will be notified about SQL errors. This notification is a service message generated by X-Cart, it does not have a template which can be edited.

- **Recurring billing notification to orders department:** Select this check box to send the e-mail notifications to the orders department about subscription payments made automatically. The look of such notification messages is defined by these templates:

  `mail/recurring_notification_admin.tpl`

  `mail/mail_header.tpl`

  `mail/signature.tpl`

  `mail/recurring_notification_subj.tpl`

  For HTML mail:

  `mail/html/recurring_notification_admin.tpl`

  `mail/html/mail_header.tpl`

  `mail/html/signature.tpl`

- **'Profile is deleted' notification to profile owner:** Select this check box to inform profile owners about the deletion of their user profiles. The look of such notification messages is defined by these templates:

  `mail/profile_deleted.tpl`

  `mail/mail_header.tpl`

  `mail/signature.tpl`

  `mail/profile_deleted_subj.tpl`

  For HTML mail:

  `mail/html/profile_deleted.tpl`

  `mail/html/mail_header.tpl`

  `mail/html/signature.tpl`

- **'Profile is deleted' notification to users department:** Select this check box to send notifications about deleted profiles to the users department. The look of such notification messages is defined by these templates:

  `mail/profile_admin_deleted.tpl`

  `mail/mail_header.tpl`

  `mail/profile_data.tpl`

  `mail/signature.tpl`

  `mail/profile_admin_deleted_subj.tpl`

  For HTML mail:

  `mail/html/profile_admin_deleted.tpl`

  `mail/html/mail_header.tpl`

```
mail/html/profile_data.tpl

mail/html/signature.tpl
```

- **'Partner account is approved' notification to partner:** If enabled, a partner candidate gets a notification when his account is approved. The look of such a notification message is defined by these templates:

```
mail/partner_approved.tpl

    mail/mail_header.tpl

    mail/signature.tpl

mail/partner_approved_subj.tpl
```

For HTML mail:

```
mail/html/partner_approved.tpl

    mail/html/mail_header.tpl

    mail/html/signature.tpl
```

- **'Partner account is declined' notification to partner:** Select this check box if you want to send notifications to partner candidates whose accounts get declined. The look of such notification messages is defined by these templates:

```
mail/partner_declined.tpl

    mail/mail_header.tpl

    mail/signature.tpl

mail/partner_declined_subj.tpl
```

For HTML mail:

```
mail/html/partner_declined.tpl

    mail/html/mail_header.tpl

    mail/html/signature.tpl
```

- **Low limit warning to orders department:** If enabled, a warning message is sent to the orders department when the quantity in stock of any of the products reaches the 'low limit'. The look of such a notification message is defined by these templates:

```
mail/lowlimit_warning_notification_admin.tpl

    mail/mail_header.tpl

    mail/signature.tpl

mail/lowlimit_warning_notification_subj.tpl
```

For HTML mail:

```
mail/html/lowlimit_warning_notification_admin.tpl

    mail/html/mail_header.tpl

    mail/html/signature.tpl
```

- **Low limit warning to provider:** If enabled, the provider gets a notification when the quantity in stock of one of his products reaches the 'low limit'. The look of such a

notification message is defined by these templates:

```
mail/lowlimit_warning_notification_admin.tpl
    mail/mail_header.tpl
    mail/signature.tpl
mail/lowlimit_warning_notification_subj.tpl
```

For HTML mail:

```
mail/html/lowlimit_warning_notification_admin.tpl
    mail/html/mail_header.tpl
    mail/html/signature.tpl
```

- **'Order is processed' notification to provider:** Enable this to inform the provider that the order is processed. The look of such a notification message is defined by these templates:

```
mail/order_notification tpl
    mail/mail_header.tpl
    mail/order_invoice.tpl
        main/order_status.tpl
        mail/order_data.tpl
    mail/signature.tpl
mail/order_notification_subj.tpl
```

For HTML mail:

```
mail/html/order_notification tpl
    mail/html/mail_header.tpl
    mail/html/order_invoice.tpl
        main/order_status.tpl
        mail/html/order_data.tpl
    mail/html/signature.tpl
```

- **'Order is processed' notification to customer:** If enabled, a customer gets a notification when his order gets processed (P). The look of such a notification message is defined by these templates:

```
mail/order_customer_processed.tpl
    mail/mail_header.tpl
    mail/order_data.tpl
    mail/signature.tpl
mail/order_cust_processed_subj.tpl
```

For HTML mail:

```
mail/html/order_customer_processed.tpl
    mail/html/mail_header.tpl
```

```
mail/html/order_data.tpl

mail/html/signature.tpl
```

- **'Order is processed' notification to orders department:** Select this check box to send the 'Order processed' notification to the orders department. The look of such a notification message is defined by these templates:

```
mail/order_notification tpl

    mail/mail_header.tpl

    mail/order_invoice.tpl

        main/order_status.tpl

        mail/order_data.tpl

    mail/signature.tpl

mail/order_notification_subj.tpl
```

For HTML mail:

```
mail/html/order_notification tpl

    mail/html/mail_header.tpl

    mail/html/order_invoice.tpl

        main/order_status.tpl

        mail/html/order_data.tpl

    mail/html/signature.tpl
```

- **'Order is completed' notification to customer:** If enabled, a customer gets this notification when his order is completed (C). The look of such a notification message is defined by these templates:

```
mail/order_customer_complete.tpl

    mail/mail_header.tpl

    mail/order_data.tpl

    mail/signature.tpl

mail/order_cust_complete_subj.tpl
```

For HTML mail:

```
mail/html/order_customer_complete.tpl

    mail/html/mail_header.tpl

    mail/html/order_data.tpl

    mail/html/signature.tpl
```

- **'Order is declined' notification to customer:** If enabled, a customer gets this notification when his order is declined (D). The look of such a notification message is defined by these templates:

```
mail/decline_notification.tpl

    mail/mail_header.tpl
```

```
mail/order_data.tpl

    mail/signature.tpl

mail/decline_notification_subj.tpl
```

For HTML mail:

```
mail/html/decline_notification.tpl

    mail/html/mail_header.tpl

    mail/html/order_data.tpl

    mail/html/signature.tpl
```

- **Gift certificate notification to orders department:** Select this check box to inform the orders department that a Gift Certificate has been purchased. The look of such notification messages is defined by these templates:

```
mail/giftcert_notification.tpl

    mail/mail_header.tpl

    mail/giftcert.tpl

    mail/signature.tpl

mail/giftcert_notification_subj.tpl
```

For HTML mail:

```
mail/html/giftcert_notification.tpl

    mail/html/mail_header.tpl

    mail/html/giftcert.tpl

    mail/html/signature.tpl
```

- **Gift certificate notification to purchaser:** If enabled, a notification is sent to the Gift Certificate purchaser. The look of such a notification message is defined by these templates:

```
mail/giftcert_notification.tpl

    mail/mail_header.tpl

    mail/giftcert.tpl

    mail/signature.tpl

mail/giftcert_notification_subj.tpl
```

For HTML mail:

```
mail/html/giftcert_notification.tpl

    mail/html/mail_header.tpl

    mail/html/giftcert.tpl

    mail/html/signature.tpl
```

- **Login error notification to site administrator:** Select this check box if you want the store administrator to get email notifications when somebody tries to log into the store under admin with a password that does not coincide with the original one. The look of

such notification messages is defined by these templates:

```
mail/login_error.tpl
    mail/mail_header.tpl
    mail/signature.tpl
mail/login_error_subj.tpl
```

For HTML mail:

```
mail/html/login_error.tpl
    mail/html/mail_header.tpl
    mail/html/signature.tpl
```

- **'Profile is modified' notification to users department:** Select this check box to send a notification to the users department if any profile has been modified. The look of such a notification message is defined by these templates:

```
mail/profile_admin_modified.tpl
    mail/mail_header.tpl
    mail/profile_data.tpl
    mail/signature.tpl
mail/profile_admin_modified_subj.tpl
```

For HTML mail:

```
mail/html/profile_admin_modified.tpl
    mail/html/mail_header.tpl
    mail/html/profile_data.tpl
    mail/html/signature.tpl
```

- **'Profile is modified' notification to profile owner:** Select this check box to inform the user that his profile has been modified. The look of such notification messages is defined by these templates:

```
mail/profile_modified.tpl
    mail/mail_header.tpl
    mail/profile_data.tpl
    mail/signature.tpl
mail/profile_modified_subj.tpl
```

For HTML mail:

```
mail/html/profile_modified.tpl
    mail/html/mail_header.tpl
    mail/html/profile_data.tpl
    mail/html/signature.tpl
```

- **'Partner profile is created' notification to profile owner:** If enabled, a profile owner

gets a notification about the creation of his partner profile. The look of such a notification message is defined by these templates:

```
mail/signin_partner_notif.tpl
    mail/mail_header.tpl
    mail/profile_data.tpl
    mail/signature.tpl
mail/signin_notification_subj.tpl
```

For HTML mail:

```
mail/html/signin_partner_notif.tpl
    mail/html/mail_header.tpl
    mail/html/profile_data.tpl
    mail/html/signature.tpl
```

- **'Profile is created' notification to profile owner:** If enabled, a profile owner gets a notification about the creation of his profile. The look of such a notification message is defined by these templates:

```
mail/signin_notification.tpl
    mail/mail_header.tpl
    mail/profile_data.tpl
    mail/signature.tpl
mail/signin_notification_subj.tpl
```

For HTML mail:

```
mail/html/signin_notification.tpl
    mail/html/mail_header.tpl
    mail/html/profile_data.tpl
    mail/html/signature.tpl
```

- **'Profile is created' notification to users department:** Select this check box to inform the users department that a new profile has been created. The look of such a notification message is defined by these templates:

```
mail/signin_admin_notification.tpl
    mail/mail_header.tpl
    mail/profile_data.tpl
    mail/signature.tpl
mail/signin_admin_notif_subj.tpl
```

For HTML mail:

```
mail/html/signin_admin_notification.tpl
    mail/html/mail_header.tpl
    mail/html/profile_data.tpl
```

```
mail/html/signature.tpl
```

- **'Client is subscribed' notification to subscriber:** If enabled, a person who has subscribed to your newsletter gets a notification that he is subscribed. The look of such a notification message is defined by these templates:

  ```
  mail/newsletter_subscribe.tpl

      mail/mail_header.tpl

      mail/signature.tpl

  mail/newsletter_subscribe_subj.tpl
  ```

  For HTML mail:

  ```
  mail/html/newsletter_subscribe.tpl

      mail/html/mail_header.tpl

      mail/html/signature.tpl
  ```

- **'Client is subscribed' subscribe notification to Reply-To newsletter email address:** Select this check box to send a notification to the Reply-To newsletter email address that a new client has subscribed to the newsletter. The look of such a notification message is defined by these templates:

  ```
  mail/newsletter_admin.tpl

      mail/mail_header.tpl

      mail/signature.tpl

  mail/newsletter_admin_subj.tpl
  ```

  For HTML mail:

  ```
  mail/html/newsletter_admin.tpl

      mail/html/mail_header.tpl

      mail/html/signature.tpl
  ```

- **'Client is unsubscribed' notification to subscriber:** If enabled, a subscriber who has unsubscribed from your newsletter gets a notification that his subscription has been terminated. The look of such a notification message is defined by these templates:

  ```
  mail/newsletter_unsubscribe.tpl

      mail/mail_header.tpl

      mail/signature.tpl

  mail/newsletter_unsubscribe_subj.tpl
  ```

  For HTML mail:

  ```
  mail/html/newsletter_unsubscribe.tpl

      mail/html/mail_header.tpl

      mail/html/signature.tpl
  ```

- **'Client is unsubscribed' notification to Reply-To newsletter email address:** Select this check box to send a notification to the Reply-To newsletter email address if

somebody unsubscribes from your newsletter. The look of such a notification message is defined by these templates:

```
mail/newsltr_unsubscr_admin.tpl

    mail/mail_header.tpl

    mail/signature.tpl

mail/newsltr_unsubscr_admin_subj.tpl
```

For HTML mail:

```
mail/html/newsltr_unsubscr_admin.tpl

    mail/html/mail_header.tpl

    mail/html/signature.tpl
```

- **'Antifraud service key is invalid' notification to orders department:** If enabled, the orders department gets a notification when the service key is invalid. The look of such a notification message is defined by these templates:

```
mail/anti_fraud_sk_invalid.tpl

    mail/mail_header.tpl

    mail/signature.tpl

mail/anti_fraud_sk_invalid_subj.tpl
```

For HTML mail:

```
mail/html/anti_fraud_sk_invalid.tpl

    mail/html/mail_header.tpl

    mail/html/signature.tpl
```

- **'Antifraud service key is expired' notification to orders department:** If enabled, the orders department gets a notification when the service key is expired. The look of such a notification message is defined by these templates:

```
mail/anti_fraud_sk_expire.tpl

    mail/mail_header.tpl

    mail/signature.tpl

mail/anti_fraud_sk_expire_subj.tpl
```

For HTML mail:

```
mail/html/anti_fraud_sk_expire.tpl

    mail/html/mail_header.tpl

    mail/html/signature.tpl
```

- **'Order is updated' notification to customer:** If enabled, a customer gets a notification when his order is updated. The look of such a notification message is defined by these templates:

```
mail/order_updated_customer.tpl

    mail/mail_header.tpl
```

```
mail/order_invoice.tpl

    main/order_status.tpl

    mail/order_data.tpl

mail/signature.tpl

mail/order_updated_customer_subj.tpl
```

For HTML mail:

```
mail/html/order_updated_customer.tpl

    mail/html/mail_header.tpl

    mail/html/order_invoice.tpl

        main/order_status.tpl

        mail/html/order_data.tpl

    mail/html/signature.tpl
```

3. Click on **Save** to apply the changes.

Related topics:

General Settings

6.4.6.8 Fancy Categories Options

The categories menu style can be changed through the Fancy Categories options page. To access this page select **General settings** in the Administration menu, then click on the item **Fancy Categories options** in the section menu.

Select a categories menu style you would like to use in your store by choosing *Candy Menu*, *Explorer* or *Icons Menu* from the drop-down list, then set the options pertaining to this menu style.

Please refer to X-FancyCategories Reference Manual for more information on Fancy Categories options.

Related topics:

Selecting Modules

6.4.6.9 General Options

Selecting **General settings** -> **General options** enables you to edit the general configuration of your store affecting the look and functionality of the customer, administrator and provider zones.

To set General options for your store:

1. Click on **General settings** in the Administration menu, select **General options** from the section menu.

2. Set the options below according to your preferences:

   - **Check this to close your shop temporarily:** Selecting this check box makes the customer zone of your store inaccessible to visitors. While your store is closed, a special message is displayed to your customers saying that the site is inaccessible temporarily and inviting to visit the store later.

   - **Key for access to a temporarily closed shop:** Enter a key with the help of which you will be able to view the customer zone while the store is closed (e.g. If the key is'123', use http://www.yourhost.com/xcart/customer/home.php?shopkey=123 to access your customer zone)

   - **Disable anonymous checkout:** Selecting this check box disables checkout for non-registered customers.

   - **Enable 'Issue Number' and 'Valid from' fields:** If selected, 'Issue Number' and 'Valid from' fields will be included into CC info form.

   - **Download key TTL(hours):** This value (Time-To-Live) defines the period during which your download key will be valid if you are selling electronically distributed products. Ensure sufficient download time.

   - **Enable debugging console:** When this option is enabled, a pop-up window appears that displays the list of templates used on the current X-Cart page. The information in this window is refreshed every time the page is reloaded. Use this option only when you want to work with templates and disable it when you finish.

     Note. If Webmaster mode is enabled, the debugging console can be used to find out the location of the templates.

   - **Redirect customer to cart:** If selected, your customers will be redirected to the shopping cart every time they add a product to cart.

   - **Disable inventory tracking:** Use this option to disable tracking the number of items in stock. Select this option only if the number of items in stock is "unlimited" for all the products in your store.

   - **Minimum allowed order total:** You can set the minimum order total that will be accepted by your store. Your customers will not be able to place an order if the order total is less than the amount specified in this field.

   - **Disable products which are out of stock:** If selected, the products which are out of stock will not be shown to the customers.

   - **Moderated sign-up for membership**: Select this option if you want sign-up for membership to be moderated.

   - **Default country:** This option allows you to set the default country. It will affect a lot of drop-down lists, language selection etc.

   - **Default zipcode:** This option allows you to set the default zipcode.

- **Default state:** This option allows you to set the default state.

- **Default city:** This option allows you to set the default city.

- **When a customer isn't logged in, it is presumed that he is from the default country:** If selected, a customer who is not logged in will not be able to make purchases but he will be shown the approximate costs on shipping, taxes, and the available shipping methods for his future purchases.

- **Primary currency symbol:** Here you set your primary currency symbol, all prices and customer charges will be calculated using the primary currency.

- **Alternative currency symbol (empty to disable). Note that credit card charges are made using primary currency:** The alternative currency symbol is used to express your prices in the units of another currency. Enter a symbol to be used for the alternative currency, if you want the price in alternative currency units to appear in brackets next to the primary currency price. Leave the field blank if you want to use only the primary currency symbol.

- **Alternative currency exchange rate:** Enter the alternative currency exchange rate.

- **Weight symbol:** Enter the weight symbol (for example lb, kg etc.)

- **Grams in the unit of weight defined by the weight symbol:** Define the unit of weight in grams.

- **If ticked, the categories list always shows root categories:** Select this check box if you want root categories to be shown in the categories list irrespective of what category level a customer is browsing currently. If you leave this check box unselected, the categories list will show only the categories available for browsing on the current level.

- **Do not ask customers to enter CC information while getting registered:** If checked, customers will not be asked to enter their credit card information in the sign-up form (Recommended)

- **Extra fields limit (per provider):** Set the maximum number of extra fields that a provider will be able to define.

- **Enable Credit Card info validation:** Selecting this check box enables validation of the credit card information provided by a customer : a special script will check the conformity of the credit card number, CVV2 and expiration date with certain rules.

- **Enable default password warning:** If necessary, you can enable default password warning here.

- **Time difference between shop location and host server location (hours):** This feature allows the shop admin to determine the time difference between the real shop location and the host server location. Setting this option allows real-time control of the customers' orders by the shop admin.

- **Enable tracking statistics:** Select this check box if you want to enable tracking statistics gathering. Unselect the check box to stop gathering tracking statistics in your store.

- **Hide disfunctional payment methods from customers:** Select this check box to prevent your customers from using disfunctional payment methods. A method is disfunctional if an

HTTPS module or some other essential component that it requires is missing. If you do not hide disfunctional methods from your customers, they will be able to use them to provide their CC info (such payments can be processed only manually)

- **Create all necessary categories during products import:** If you select this check box, providers will be able to create categories in the process of importing products. If you leave it unselected, providers will not be able to create categories - all the categories will be defined by the store admin.

- **Parse Smarty tags in the content of embedded static pages:** Select this check box if you want your static pages to be treated as templates.

- **Use HTTPS for users' login and registration:** Select this check box if you want to enable your customers to use HTTPS during login and registration.

- **Use secure login form on a separate page (HTTPS):** If you select this check box, the authorization pages of the admin, provider and customer zones will contain links to separate pages from which the users of your store will be able to log into the appropriate zones via HTTPS.

- **Do not redirect customers from HTTPS to HTTP:** Select this check box if you want to enable your customers stay in HTTPS all the time. If you leave the box unselected, HTTP will be used for the pages where security is not required.

- **The full path to Perl interpreter executable (e.g. WIN32: 'd:\perl\bin\perl.exe'; UNIX: '/usr/bin/perl' or leave this field empty):** Use this field to define the full path to Perl binary for the upgrade to work under Windows operating system.

- **Preferred HTTPS module (if not found the first available module will be used):** Use the drop-down box to choose the module you would prefer to use for sending HTTPS queries (Net::SSLeay, CURL, libCURL, Open SSL executable, HTTPS-cli executable). Please make sure the module you want to use is already installed on the server (You can check it using Administration menu > Summary > Environment info). If the preferred module is unavailable, X-Cart will use the first available module that it will find.

- **Use JavaScript version for state and country selector:** If you select this check box, a JavaScript mechanism will facilitate the process of selecting the state of residence by a customer: only the states of the country he selected will be shown (if the states are not specified, the customer will be allowed to enter the name of his state into an input box. If the country has no states, no states will be offered for selection).

- **Use counties:** If you select this box, the store users will be able to specify their county of residence in the profile details. (Do not forget to activate 'County' field in General settings -> User profiles options). 'County' field may be either an input box or a select box (If you want to enable your customers to select counties from a list, please set up counties via States in the Management menu).

- **Display CVV2 input box at the last stage of checkout if Manual CC processing is used:** If you select this box, CVV2 will be displayed at the last stage of checkout if Manual CC processing is used.

3. Click on **Save** to save the changes.

Related topics:

General Settings

Defining Shipping Methods

Defining Payment Methods

Managing Your News

Managing User Profiles

6.4.6.10   Gift Registry options

If you are going to use X-GiftRegistry module, you should set Gift Registry options.

To set Gift Registry options for your store:
1. Click on **General settings** in the Administration menu, select **Gift Registry options** from the section menu.
2. Set the options below according to your preferences:

   • **Maximum number of lists per user:** Enter the maximum number of event wish lists a customer can have.

   • **Maximum number of recipients per user:** Enter the maximum number of recipients to whom event notifications may be sent (per user).

   • **Events per page:** Enter the maximum number of events to be displayed per page in search results.

   • **Disable the possibility to import and export recipients for the customer:** Select this check box to disable the possibility to import/export recipients for the customers.
3. Click on **Save** to apply the changes.

Related topics:

General Settings

Selecting Modules

6.4.6.11   GnuPG Options

GnuPG stands for GNU Privacy Guard and is GNU's tool for secure communication and data storage. If you choose to include order details (credit card information) into admin order notification messages, you are likely to need a tool for encrypting data sent to the store admin via email. In this case GnuPG as an external crypto engine can be a good solution.

If you selected GnuPG to be used as an encryption method for your emails (General settings -> Security options), set GnuPG options.

To set GnuPG options:
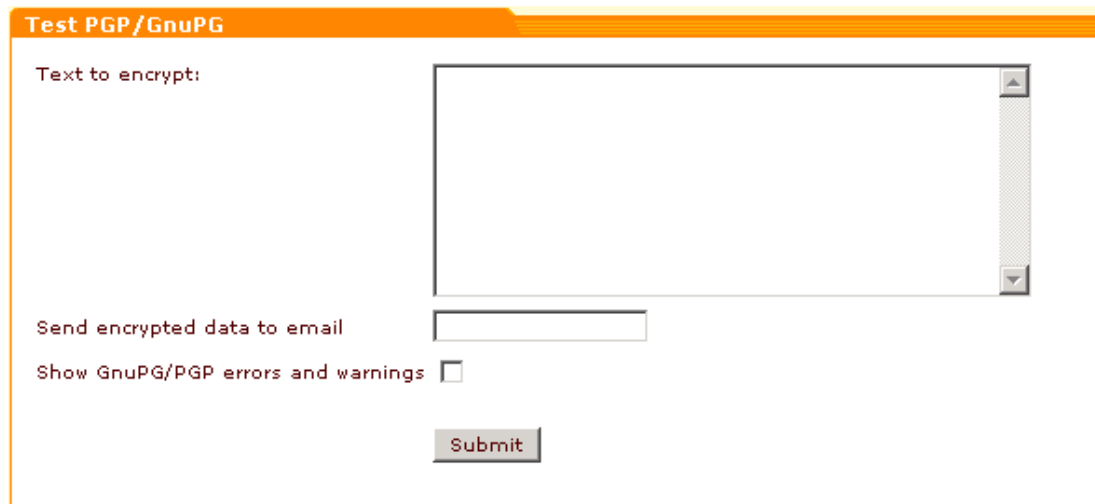
1. Click on **General settings** in the Administration menu, select **GnuPG options** from the section menu.
2. Set the options below:

   • **Home path:** Enter the path to GnuPG home directory.

   • **GnuPG binary path:** Enter the path to GnuPG executable.

   • **GnuPG user id:** Enter your user ID.

   • **GnuPG public key:** Enter the public key that will be used to encrypt your data.
3. Click on **Save** to apply the changes.

You can test if GnuPG encryption method is working correctly.

To test data encryption by GnuPG:

1. Click the link at the bottom of GnuPG options page ('Click here to test data encryption by GnuPG/PGP'). The Test PGP/GnuPG form will appear.

   Picture 1: *Test PGP/GnuPG form.*

1. Enter a piece of text you would like to be encrypted.
2. Enter the email address to which the encrypted text should be sent.
3. If you want GnuPG errors and warnings to be shown to you, select the appropriate check box.
4. Click on **Submit** to start the test run.

Related topics:

General Settings

PGP Options

6.4.6.12   Interneka Options

If you are going to use Interneka module as a means of affiliate tracking, you will need to set Interneka options.

To set Interneka options:

1. Click on **General settings** in the Administration menu, select **Interneka options** from the section menu.
2. Set the options below:

   • **Enter your Interneka ID:** Use this field to enter your Interneka ID.

   • **Check this to enable 'per Sale, %' payment model:** Select this check box to enable 'per Sale, %' payment model.

   • **Check this to enable 'per Lead, $' payment model:** Select this check box to enable 'per Lead, $' payment model.

3. Click on **Save**.

Related topics:

General Settings

Selecting Modules

6.4.6.13   Modules Options

This section enables you to select various modules options.

Note. To select the modules to be used with your X-Cart store see topic Selecting Modules.

To set Modules options:

1. Click on **General settings** in the Administration menu, select **Modules options** from the section menu.
2. Set the options below according to your preferences:

   • **Show expired Gift Certificates:** If selected, expired Gift certificates will be shown to the shop admin (valid only if Gift Certificates module is enabled).

   • **Minimum Gift Certificate value:** Use the field to define the minimum cost of a Gift certificate (Gift Certificates module).

   • **Maximum Gift Certificate value (0 if unlimited):** Use the field to define the maximum cost of a Gift Certificate (Gift Certificates module).

   • **Number of products in bestsellers list:** Use the field to define how many products you

want to be displayed in the bestsellers list. Bestsellers list is displayed on the storefront if Bestsellers module is enabled.

- **Select recommended products randomly:** If checked, products for the recommended products list will be selected at random (Recommended products module).

- **Number of products to be displayed in recommended products list:** Use the field to define how many products you want to be displayed in your recommended products list (Recommended products module).

- **Allow viewing reviews:** Selecting this check box enables your customers to view product reviews written by other customers (Customer reviews module). Unselecting this check box hides Customer reviews section from the Product rating form.

- **Allow voting:** Selecting this check box enables your customers to rate your products by selecting product ratings from the drop-down box (Customer reviews module). Unselecting this check box hides Product rating section from customers.

- **Allow adding reviews:** Choose one of the three options (Customer reviews module):

  N - disallow to all (none of your customers will be allowed to add their reviews),

  A - allow to all (any customer who wishes to add a review of a product will be able to do so),

  R - allow to registered (only registered customers will be allowed to add reviews).

- **Froogle username:** Use this field to enter your Froogle username (used to export products in Froogle compatible format)

- **Froogle password:** Use this field to enter your Froogle password.

- **Show thumbnails in bestsellers list:** If selected, a thumbnail picture will be shown in the bestsellers list next to the product name (Bestsellers module).

- **Show bestsellers list in the menu column:** If selected, the bestsellers list will be shown in the menu column on the customer front-end (Bestsellers module).

- **Enable posting Gift Certificates by mail:** Select this option if you want to send Gift certificates by mail (Gift Certificate module).

- **Gift Certificate blocking period (to prevent multiple usage of the same Gift Certificate) (minutes):** When your customer uses a Gift Certificate to pay for the products in his shopping cart, this Gift Certificate is blocked for the time period (in minutes) specified in this field. This is needed to prevent multiple usage of the same Gift Certificate (Gift Certificate module).

- **Secret key to avoid non-authorized usage of Subscriptions module:** Use this field to enter your secret key.

- **Open Product details page in a new window when a customer clicks on a product link in "Related products" list:** If selected, the details of a related product will be opened in a new window.

- **Antifraud safe distance (km):** Enter the maximum allowable distance (in kilometers) between a customer's billing address location and his IP address location.

- **Order total threshold (an order is considered large if the order total exceeds this amount):** Enter the 'threshold' order subtotal amount that will be used by Antifraud service for fraud risk evaluation. If the subtotal of an order exceeds this value, Antifraud server uses an additional coefficient to increase the fraud risk factor rate of the order.

- **Fraud risk factor (Antifraud module). If fraud risk factor is greater than this limit, order status will be 'Queued':** Enter the fraud risk factor limit you would like to use for Antifraud module (a value from 1 to 10).

  E.g. Suppose, you set the value of this field to 5. Now if a customer provides data the fraud risk factor of which is evaluated by Antifraud module as 5 (50% fraud), his order will not be processed automatically. The status 'Queued' will be assigned to this order and it will be put off for you to process it manually.

- **Antifraud module subscription key:** Use this field to enter your Antifraud module service key.

- **Manufacturers list limit:** Use the field to define the maximum number of manufacturers to be displayed in the Manufacturers list on the storefront.

- **Show manufacturers list in the menu column:** If selected, the Manufacturers list will be shown in the menu column.

- **Manufacturers per page (admin):** Use the field to define the maximum number of manufacturers to be shown per page in the Manufacturers section of the admin zone.

- **Forcedly to turn on Manual CC processing if the cart contains EGoods:** Select this check box if you want to use Manual CC processing for orders containing EGoods.

- **The dynamic updating of the Save Money label depending on the selected product options is enabled:** Select this option to enable dynamic updating of the Save Money label.

3. Click on **Save** to save the changes.

Related topics:

[General](#) [Settings](#)

[Selecting Modules](#)

[Managing Gift Certificates](#)

6.4.6.14 PGP Options

PGP stands for Pretty Good Privacy and is encryption software used to encrypt data for security purposes when the data is transmitted over the Internet. PGP uses public key encryption, a system that provides for privacy and authentication of both the sender and the receiver of the message. If you choose to include order details (credit card information) into admin order notification messages, you are likely to need a tool for encrypting data sent to the store admin

via email. In this case PGP can be a good solution.

If you selected PGP to be used as an encryption method for your emails (General settings -> Security options), set PGP options.

To set PGP options:

1. Click on **General settings** in the Administration menu, select **PGP options** from the section menu.
2. Fill in the fields below:
   - **Home path:** Enter the path to PGP home directory where PGP configuration file and keyrings are stored.

     Note. All the files in this directory must belong to the user under which PGP is running (usually Web server), and have permissions UNIX 0600, directory must have permissions 0700

   - **PGP binary path:** Enter the path to PGP executable.
   - **PGP user id:** Enter your user ID (an ASCII string used to identify a user).
   - **PGP public key:** Paste the public key that will be used to encrypt your data (After you click on the **Save** button, it will be automatically added to your public keyring).
   - **Use PGP version 6**: Select the check box if you are using PGP version 6.
3. Click on **Save**.

More information about PGP is available at http://www.pgpi.org/doc/

You can test if PGP encryption method is working correctly.

To test data encryption by PGP:

1. Click the link at the bottom of PGP options page ('Click here to test data encryption by GnuPG/PGP'). The Test PGP/GnuPG form will appear.

Picture 1: Test PGP/GnuPG form.

1. Enter a piece of text you would like to be encrypted.
2. Enter the email address to which the encrypted text should be sent.
3. If you want PGP errors and warnings to be shown to you, select the appropriate check box.
4. Click on **Submit** to start the test run.

Related topics:

General Settings

GnuPG Options

6.4.6.15   QuickBooks Options

If you are planning to use QuickBooks module, set QuickBooks options after enabling QuickBooks in the Modules section of the admin interface.

To set QuickBooks options for your store:

1. Click on **General settings** in the Administration menu, select **QuickBooks options** from the section menu.
2. Set the options below according to your preferences:

   Picture 1: *QuickBooks options.*

General settings

QuickBooks options

The name of the class for the transactions from X-Cart.:	Website:Retail
The name of the income account you use to track taxes from X-Cart. The type of this account should be INC.:	Website:Tax
The name of the income account you use to track sales of products from X-Cart. The type of this account should be INC.:	Sales:Product
The name of the income account you use to track sales of Gift Certificates from X-Cart. The type of this account should be INC.:	Sales:Gift Certificate
The name of the income account you use to track disounts by Gift Certificates. The type of this account should be INC.:	Sales:Gift Certificate Discoun
The name of the income account you use to track shipping cost. The type of this account should be INC.:	Sales:Shipping
The name of the income account you use to track discounts by Discount Coupons. The type of this account should be INC.:	Sales:Coupon Discount
The name of the income account you use to track discounts. The type of this account should be INC.:	Sales:Discount
The name of the asset account for the inventory items:	Inventory Asset
Declare order products as inventory items:	☑
The minimum quantity of inventory items you want to keep in stock at any time:	0
The name of the COGS account for the inventory items:	Cost of Goods Sold
Export information about processed orders:	☑

Save

3. Click on **Save** to save the changes.

Note. To change the default accounts and other information specific for QuickBooks, edit the template skin1/modules/QuickBooks/orders_export_qb.tpl

Related topics:

General Settings

Selecting Modules

6.4.6.16   Product Search Options

You can define the set of fields that should be included into the product search form in the customer zone.

To set Product search options:

1. Click on **General settings** in the Administration menu, select **Product search options** from the section menu.
2. Select the check boxes in the **ACTIVE** column next to the names of the fields you want to be included into the search form.
3. If needed, set the default values of the active fields that will be shown to your customers.
4. Click on **Save**.

Related topics:

General Settings

Searching for Products

6.4.6.17   Security Options

The Security options section can be used to define the encryption method for your order emails, enable Blowfish encryption, set up a filter for the extensions of files that can be uploaded to the server, etc.

To set Security options:

1. Click on **General settings** in the Administration menu, select **Security options** from the section menu.
2. Set the options below:

   • **Order emails encryption method:** Select the appropriate method for order emails encryption from the drop-down box (*None*, *PGP*, *GnuPG*).

   • **Comma separated list of file extensions disallowed for uploading:** Enter a comma separated list of file extensions (e.g. php, pl, cgi, asp, exe, com, bat, pif) the uploading of which onto the server you would like to disallow.

   • **Check if payment gateway response is coming from the IP's specified here (enter a comma separated list):** Enter a comma separated list of IP's from which payment gateway responses can be accepted.

   • **Blowfish encryption method is enabled:** Select this check box if you are going to use Blowfish encryption method.

3. Click on **Save**.

4. (If you have selected '***Blowfish encryption method is enabled'*** option) Use the 'Add merchant key' section to provide a new merchant key. Enter the key a second time for confirmation. Click on **Submit Query**.

Blowfish

Blowfish encryption method can be used to ensure a more secure encryption of the details field in xcart_orders table.

By default Blowfish encryption is disabled. It can be enabled in '*General Settings/Security options'* section of the admin interface. When the administrator attempts to enable this option, he is transferred to the page where a new Merchant key for Blowfish can be entered. On this page the administrator is required to enter the desired new password and to confirm it. If all the requirements are met (the password is at least 6 characters long and the password confirmation is correct), the new password is created. Only after that Blowfish encryption option is actually enabled. Please note that the password itself is not saved in the system. Instead, its MD5 signature is saved to xcart_config database.

Initially, when the order is placed in the database it is encrypted with the standard encryption method. If the administrator wants to use Blowfish encryption method, he enters his Merchant key in the admin interface. At this point all the orders that have not been yet encrypted by Blowfish are recrypted with this password according to Blowfish method. Next time when the shop administrator wants to view the encrypted details fields he will not be able to do so without entering the Merchant key.

The administrator has the ability to change his Merchant key. After he enters the existing valid Merchant key in the admin interface, all the encrypted details fields are decrypted. Then the administrator goes to the page where Merchant key can be changed and changes it. When after changing his Merchant key the administrator enters the new key in his interface, all details fields are recrypted again with the new password.

admin/post_recrypt.php is an interface that can be used for remote recrypting of the details fields from the standard encryption method to Blowfish. It sends a POST request via HTTPS protocol to the script that does the recryption, transmitting Merchant key in merchant_password parameter. It can be called from the command line (for example: php post_recrypt.php merchant_password=test). It can also be called from the browser so that Merchant key would be transmitted through merchant_password GET parameter. The third way of transmitting the Merchant key is including it into the script code. It is the most secure way of sending the

password as it will not appear in the command line or in the browser.

If the administrator disables Blowfish encryption (which is possible only if a valid Merchant key is entered), all details fields are recrypted back to the standard method.

In Blowfish encryption CRC32 is added which is used later on to check if the data has been decrypted correctly.

Related topics:

General Settings

6.4.6.18   SEO Options

You can set SEO options for your store.

To set SEO options:
1. Click on **General settings** in the Administration menu, select **SEO options** from the section menu.
2. Set the options below:

   • **Site META description:** Use this field to enter a general description for your store site.

   • **Site META keywords:** Use this field to list META keywords for all the pages of your site.

   • **Include categories' META data into the site meta tags:** Select this check box if you want categories' META data to be included into the site META description and META keywords sections.

   • **Include products META data into the site meta tags:** Select this check box if you want products' META data to be included into the site META description and META keywords sections.

   • **Page title format:** Define the look of the page titles in your store by selecting the necessary format from the drop-down box.

   • **Maximum length of page title element (leave 0 or empty if not applicable):** Limit the length of the page title element if necessary.
3. Click on **Save** to apply the changes.

Related topics:

General Settings

6.4.6.19   Shipping Options

Shipping options affect the calculation of shipping rates in X-Cart. To access the section where shipping options can be set up, click on **General settings** in the Administration menu, then select **Shipping options** from the section menu.

The first subsection of the shipping options page enables you to define general shipping options.

Picture 1: General shipping options.

If the **Enable all shipping methods even if a customer is not logged in** check box is selected, all the active shipping methods will be shown to the customer even if he is not logged in.

If the **Disable shipping** check box is selected, there will be no shipping methods for the customer to select during the checkout process and the cost of shipping will not be presented in the cart totals.

If the **Do not calculate shipping rates for products with defined shipping freight** check box is selected, shipping rates for the products with defined shipping freight will not be calculated.

Next, you can define whether you want to use real-time shipping calculations.

If you use real-time shipping rates calculation, you do not need to regularly update the shipping charges for the shipping methods you use for your store. Rates are received automatically from the shipping services' servers.

Note. The real-time calculated rate quote is only an estimation and may be different from the actual charges for your shipment.

Picture 2: Real-time shipping options.

To activate real-time calculation of shipping rates, select the **Real-time shipping calculation**

check box.

If you have an account with InterShipper service, you can use it in your store for getting real-time shipping rate quotes.

Note. You can sign up for an account with this service at http://www.intershipper.com

To enable InterShipper, check both the **Real-time shipping calculation** and **Select this if you are going to use InterShipper calculation services** check boxes, and real-time shipping quotes will be pulled by InterShipper from FedEx, UPS, USPS and DHL and presented to the customer during the online order checkout process.

Note. Keep in mind that Intershipper works only with US origins

Your InterShipper account information needs to be entered into the InterShipper account section of the 'Shipping options' page.

Picture 3: InterShipper account section of the Shipping options page.

If you do not want to use InterShipper, you can get shipping quotes from some of the services directly: special integrated modules will fetch real time shipping quotes from UPS, USPS and FedEx. To use these modules instead of InterShipper leave the **Select this if you are going to use InterShipper calculation services** check box unselected.

If you are planning to get rates from USPS, get an account from USPS site at http://www.usps.com. Enter your account info into the USPS account section of the 'Shipping options' page.

Picture 4: USPS account section of the Shipping options page.

If you need to use CANADA POST, set up an account with this service at http://www.canadapost.ca and enter your account details into the CANADA POST account section of the 'Shipping options' page.

Picture 5: CANADA POST account section of the Shipping options page.

If you need to use Airborne, set up an account with this service at http://www.airborne.com and e nter your account details into the Airborne account section of the 'Shipping options' page.

Picture 6: Airborne account section of the Shipping options page.

Note. The list of real-time shipping methods available to your customers can be edited under Management menu > Shipping methods.

Note. If you are planning to use real-time shipping rates calculation by InterShipper, Airborne, FedEx, U.S.P.S. or Canada Post, make sure you set up the appropriate processors (See Setting up Real-Time Processors).
If you are going to use UPS, enable UPS OnLine® Tools module (Administration menu -> Modules). Then use the **UPS OnLine® Tools** item in the Management menu to define the necessary settings for UPS.

If you need to test real-time shipping rates calculation at your store, you can use the 'Test Realtime Shipping Rates Calculation' section of the 'Shipping options' page.

Picture 7: 'Test Realtime Shipping Rates Calculation' section of the 'Shipping options' page.

1. Enter package weight (units should be defined in the Administration menu -> General settings -> General options section: 'Weight symbol' and 'Grams in the unit of weight defined by the weight symbol').
2. Click on **Test**. 'Test destination shipping address' form will appear in a new window.

Picture 8: Test destination shipping address form.

3. Enter a destination address (for test purposes only).
4. Click on the **Submit** button to get XML request and response results and estimated shipping rates.

Related topics:

General Settings

Defining Shipping Methods

Setting up Real-Time Processors

UPS OnLine ® Tools

6.4.6.20   Stop List Options

To set up Stop List options:
1. Click on **General settings** in the Administration menu.
2. Select **Stop list options** from the section menu.
3. Set the options below.

> • **Check if the current set of products in the cart coincides with the product set from an order originating from a blocked IP:** Select this check box if you want IP

addresses from which new orders are placed containing the same products as some order originating from an IP already entered into the Stop List to be entered into the Stop List as well. Enabling this option can prevent a hacker from placing fraudulent orders from other IP addresses after his first IP was blocked. However, please note that the fact that an order contains the same products as an order from a blocked IP may be sheer coincidence. If you believe the risk of IP addresses of honest customers getting into the Stop List is too high, keep this option disabled.

• **Maximum transaction from one unique IP address (per day):** Set up the maximum number of transactions from the same IP address during a day.

• **Maximum number of failed transactions allowable for the same IP address. If this limit is exceeded, the IP address is placed into the Stop List:** Use this option to set the limit of failed transactions allowed for one IP address. If the number of failed transactions from some IP address exceeds the fixed limit, this IP address is included into the Stop list.

• **Failed transaction limit in one session:** Set up the number of failed transactions allowable in one session (transactions may be conducted from different IP addresses). If the limit of failed transactions is exceeded, the customer will not be able to complete order checkout procedure.

• **Maximum number of transactions the order placing time of which does not exceed the minimum time allowed for order placement. When this limit is reached, the IP address of the customer is entered into the Stop list:** Use this option to set the maximum allowable number of transactions from one IP address in which orders are placed in less time than is normally required for placing an order.

• **Minimum time of order placement ensuring that the order was placed by a person, not by a script:** Set the minimum time (in seconds) in which you believe an order can be created by a human being. If an order is created quicker than this time limit, it will be treated as the one created by a script, not a person.

• **Fail checkout process, if the customer proxy is anonymous:** Select this check box if you wish to forbid checkout for customers using anonymous proxy servers.

3. Click on **Save**.

Related topics:

General Settings

Managing the Stop List

6.4.6.21   User Profiles Options

User Profiles options allow you to define what fields should be included into the 'Profile details' form for different types of X-Cart users and select whether filling out these fields should be

mandatory or optional. This section also allows you to create additional fields for the 'Profile details' form and define the way they should be filled out.

To define what kind of information should be included in user profiles:

1. Click on **General settings** in the Administration menu, select **User Profiles options** from the section menu.

Picture 1: User profiles options.

2. In 'User Profiles options' section select the **Active** check boxes for the fields that should be displayed on the 'Profile details' forms.
3. Select the **Required** check boxes for the fields that should be mandatory. On the 'Profile details' forms mandatory fields will be marked by the red * sign.
4. Click on **Save** to apply the changes.

To add a new field to the 'Profile details' form:

1. Click on **General settings** in the Administration menu, select **User Profiles options** from

the section menu.

2. Scroll down to the 'Add new field' part of the 'Additional fields' section.

Picture 2: *Additional fields section.*

3. Enter the name for the new field.
4. From the drop-down list select the section of the 'Profile details' form in which the new field should be located (You can either add the field to one of the existing standard sections - *Shipping Address*, *Billing Address*, *Personal Information*, *Contact Information* - or place it in the *Additional Information* section. The section *Additional Information* will be created automatically as soon as you add the new field. If necessary, you will be able to add more fields to this section)
5. Select the appropriate field type from the drop-down list (*Text*, *Select box* or *Check box*). *Text* should be selected if you want your users to be able to type information into the provided field manually. *Check box* may be useful if you want your customers to indicate the presence or absence of some characteristic. *Select box* enables the users to choose from a number of options. If you choose the *Select box* type, list the options from which the users will be supposed to choose in the **Variants for Select box type** field (use ';' for the delimiter).
6. Specify the position of the new field by entering the appropriate number into the **Pos** field.

Note. When a new field is added to the 'Profile details' form, it appears at the end of one of the standard sections (after all the standard fields). **Pos** field allows you to change only the order in which the additional fields are sorted.

7. Click on **Add/Update**. The new field will appear in the appropriate 'Profile details' section and in the 'Additional fields' list.

Picture 3: *Additional fields section (ICQ field has been added).*

Remember to select **Active** / **Required** check boxes for this field where necessary.

8. Repeat steps 3-8 to add more fields.

If you want to delete an additional field, select this field in the 'Additional fields' list and click on **Delete selected**. To change the parameters of an existing additional field, change these parameters in the 'Additional fields' list and click on **Add/Update**.

Related topics:

General Settings

Managing User Profiles

6.4.6.22 XAffiliate options

If you purchased X-Cart Affiliate module, you will need to set XAffiliate options for your store.

To set XAffiliate options:

1. Click on **General settings** in the Administration menu, select **XAffiliate options** from the section menu.
2. Set the options below:

   - **Specify how long a partner cookie should be stored on a customer's computer (days). Leave empty if you do not want to store it:** A customer who learned about your store from one of your partners may come to order products at your store not immediately, but in a few days. If by the time the customer places an order the partner cookie is still stored on his computer, X-Cart recognizes him as the one referred to the store site by a particular partner and calculates the partner's commission. If you choose not to store partner cookies on your customers' computers, partner's commission will be calculated and paid only if a customer buys something at your store coming directly from a partner's

site.

- **Maximum number of partnership levels:** Specify the maximum number of levels for multi tier partnership.

- **Multi tier partnership is enabled:** If you select this check box, multi tier partners will be enabled.

- **Moderated partner registration:** If you select this check box, those who sign up for partner membership with your store will need to get administrator's approval to actually become partners.

- **Enable partners to see order totals:** If you select this check box, totals of the orders made via a partner will be included into the table shown to the partner in his personal area.

- **Display banners in Administration area as IFRAME:** If you select this check box, banners will be displayed in Administration area as IFRAME.

- **Allow partners to register:** If you select this check box, anyone will be able to sign-up for partner membership with your store. If you disallow partners to register, only admin will be able to create new partner profiles. See topic Managing User Profiles for details

3. Click on **Save**.

Related topics:

General Settings

Managing User Profiles

6.4.7　Managing Images Location

Images used in your online store can be stored either in the database or on the file system.

You can select **Images Location** in the Administration menu to switch your X-Cart shop to store images (category icons, product thumbnails and/or detailed product images) in the database or on the file system. By default, all images are stored in the database. Storing images on the file system may be helpful if your database performance is poor or its size is limited.

IMPORTANT! If you want to move images from the database to the file system, make sure you specified the correct path to the place where your images will be stored (You should specify the path on the server where X-Cart is installed, not on your local machine). For UNIX users, make sure that this directory has world writable permissions (go to the specified directory and issue the command: chmod 0777).

It's strongly recommended to make a backup of your database before you proceed.

Picture 1: *Images location.*

Category icons

Store images in:	Database
Path to images on the local server*:	
	e.g. /u/svowl/public_html/eshop_dohtur
Allow to store images only in the directory specified here*:	☐
File size limit (bytes)**:	0

Product thumbnails

Store images in:	Database
Path to images on the local server*:	
	e.g. /u/svowl/public_html/eshop_dohtur
Allow to store images only in the directory specified here*:	☐
File size limit (bytes)**:	0

Detailed product images

Store images in:	Database
Path to images on the local server*:	
	e.g. /u/svowl/public_html/eshop_dohtur
Allow to store images only in the directory specified here*:	☐
File size limit (bytes)**:	0

*pertains to storing images on the file system only.
**'0' - not limited.

Submit

To move images from the database to the file system:

1. Open 'Images Location' page in the admin area.
2. Use the drop-down box to change the storing place for a certain group of images (category icons, product thumbnails or detailed product images): select *File system* instead of *Database*.
3. Enter the absolute path to where the images will be stored on the local server (set write permissions by issuing the command: chmod 0777. After moving the images you can change the permissions back to 0644).
4. If you select 'Allow to store images only in the directory specified here' check box, all your images will be stored by default in the directory specified at the previous step. If you leave the check box empty, when uploading your images you will be able to choose a subdirectory of 'xcart/files' directory.
5. Specify the file size limit (enter 0 for 'unlimited').
6. Click on **Submit**.

When you move your images from the database to the file system, they are removed from the database and a value is assigned to the 'image_path' field that stores in the database the absolute path to the image file on the file system. When you upload the images from the file system to the database the image files are not removed and the value of the 'image_path' field is not changed.

You can view the images transferring log by clicking on the 'See **Log file**' link at the bottom of the form.

Displaying the images works so that if the images are stored in the database (where the binary code of the images is contained) but the system fails to find the required image in the database (because of the unsuccessful uploading), you get the file from image_path. If there is not such a file, you get the default image (defined in config.php).

Please note:

After X-Cart installation in the directory 'xcart/files' a special .htaccess file is created containing Apache webserver directives that forbid access to 'xcart/files' directory from the Web. This file is perceived only by Apache webserver and its derivatives. Microsoft IIS webserver ignores this file.

.htaccess is used because 'xcart/files' directory can be used by administrators and providers to store various files for the online store, for example, CSV files for product import and so on.

If you want to use pictures stored on the file system inside the directory 'xcart/files' (in 'xcart/files' itself or lower in the directory tree - for example, in 'xcart/files/myimages'), you can do one of the following:
1. If you are absolutely sure that neither you nor your providers will use 'xcart/files' to store files of any importance, you can simply remove the .htaccess file.
2. You can re-configure the .htaccess file according to the pattern below:

   ```
   ---------------------
   Order allow,deny
   <FilesMatch "\.(gif|jpe?g|png)$">
   Allow from all
   </FilesMatch>
   Deny from all
   ---------------------
   ```

   Configuring the .htaccess file in this way makes *.gif, *.jpg, *.jpeg and *.png files accessible from the Web, while access to the other files inside xcart/files' directory remains denied.

   The line "Order allow,deny" must not contain any spaces except for the one after "Order" .
3. (The best variant) You can use a different directory for storing images (for example, 'xcart/images'), uploading images to this directory with your FTP/SSH client.

6.4.8   Working with Languages

Editing the text of the store interface

The text appearing in the interface of your X-Cart-based store (all kinds of text notes, labels and error messages), as well as the text contained in email notifications sent to the store users, is completely editable. If necessary, a user with administrative privileges can change the wording of any text piece in the store. Editing the text of the store interface does not require any programming skills: all the changes can be done directly from the admin interface. Let's see how it can be done.

Normally, X-Cart template code and program code do not use any text pieces directly. For the most part, displaying text in X-Cart involves usage of *language variables*. Every language variable has a name and a value. The value of a language variable is a text piece which can be displayed in the store interface or in an email notification.The name of the variable is a reference to that text piece used by X-Cart template code or (more rarely) program code to output the text piece onto the screen.

For example, **msg_adm_card_types_add** is the name of a language variable responsible for displaying the text piece "A new credit card type has been successfully added" in the following information box:
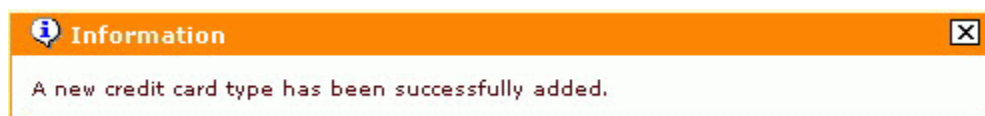
"A new credit card type has been successfully added" is the value of the variable **msg_adm_card_types_add**.

As text is kept separately from the template or program code, you do not have to change any code to change X-Cart text. All you need to do is find out what language variables are responsible for displaying the text you want to change and then use X-Cart 'Languages' section to find the corresponding language variables and edit their values.

'Languages' section also allows you add new language variables and delete existing ones.

To edit the text of the store interface:
   1. Click on **Languages** in the Administration menu. 'Edit languages' section will be opened.

   Picture 1: 'Edit languages' section.

2. Use the 'Language' drop-down box in the 'Edit language' form to select the language that needs to be edited.

Picture 2: Edit language form.

If you have not added any languages to your store yet, the 'Language' drop-down box will contain an only language - English. However, if your store supports multiple languages, all of them will be listed in the 'Language' box and you will be able to select and edit any of them.

3. After selecting a language for editing, wait for the page to be refreshed. You will notice that the look of the page will change:

Picture 3: 'Edit languages' section after page refresh.
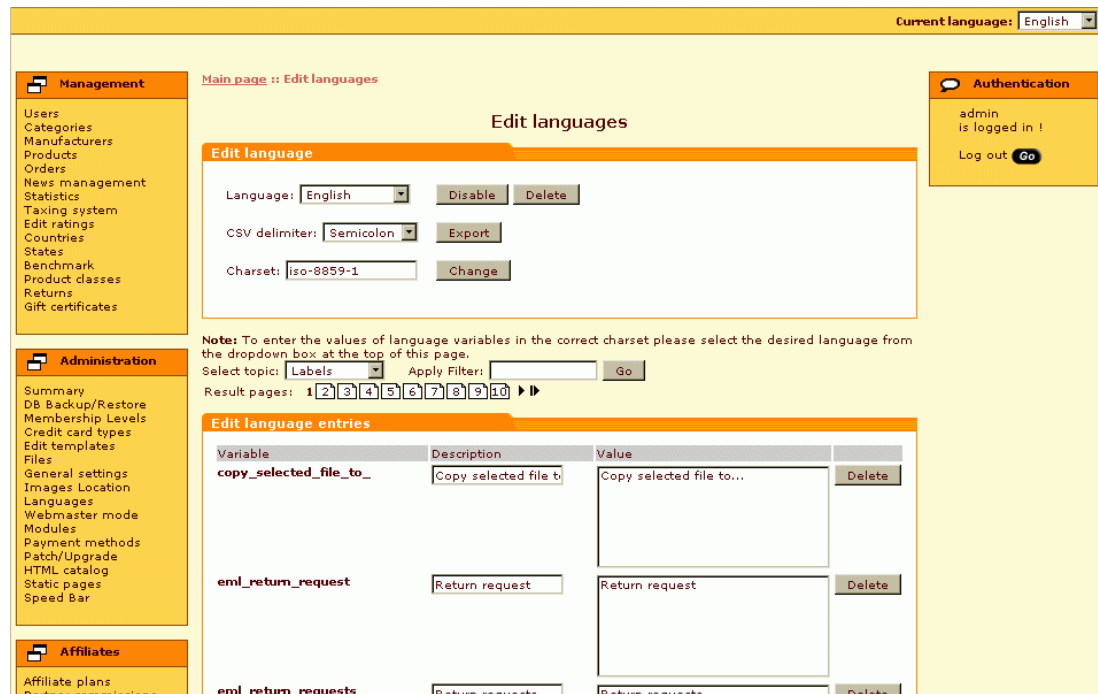
4. Make sure the charset in the 'Edit language' form corresponds to the language being edited. Charsets affect the way symbols are displayed in your users' browsers, so choosing the correct charset is important. By default, the value of the 'Charset' field is **iso-8859-1**, which is appropriate for English and some other European languages. If you need a different charset, edit the content of the 'Charset' field and click on the **Change** button next to it.

Picture 4: *'Edit language' form (after page refresh).*
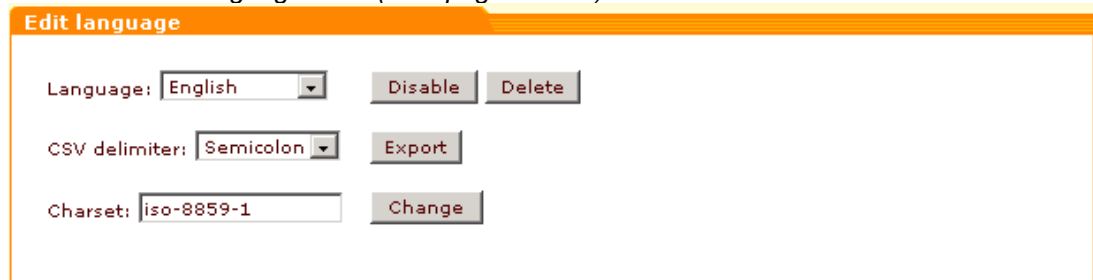
The following resources provide information on the usage of charsets:

http://en.wikipedia.org/wiki/Charset

http://en.wikipedia.org/wiki/ISO_8859

http://en.wikipedia.org/wiki/ISO_8859-1

5. Select the language being edited from the language selector (a drop-down box located at the top of the page). Doing so ensures that language variable values will be entered in the correct charset.

6. Find the language variable you would like to edit/delete or, if you want to add a new variable,

choose a place where you want the new variable to be stored. This can be done by using a special filter:

For your convenience, all the language variables are divided into several groups:

- Labels - shorter text pieces: section titles, field names, etc;
- Text - longer text pieces: notes, comments, instructions, etc;
- Errors - texts of error messages;
- E-Mail - texts of email notifications;
- Languages - names of languages in the language you are currently editing;
- Countries - names of countries in the language you are currently editing.

The 'Select topic' box of the filter allows you to select the group to which a language variable belongs or should belong. The 'Apply Filter' box allows you to search for specific variables.

To find a variable:

a. Select the name of the group to which the variable belongs from the 'Select topic' drop-down box.
b. Wait for the page to be refreshed.
c. Look at the search results in the 'Edit language entries' form and decide which language variable you would like to edit or delete.

Picture 5: The variables listed in the 'Edit language variables' form are the result of selecting 'Errors' from the 'Select topic' box.

d. If the 'Edit language entries' form displays too many entries, try to narrow the range of search results: enter the variable name or, at least, a fragment of the variable name into the 'Apply Filter' box and click on the **Go** button.

> **Note.** Names of variables responsible for displaying text in the store interface can be found out by using Webmaster mode: when Webmaster mode is on and you place your mouse cursor over some text, the browser status line (at the bottom) shows (a) the name of the template; (b) the name of the language variable. Names of variables whose values are not displayed in the store interface itself (for example, text in email notifications) can be found out by looking at the code of the corresponding templates (For example, using X-Cart template editor: Administration menu->**Edit templates**).

Picture 6: ' The variables listed in the 'Edit language variables' form are the result of selecting 'Errors' from the 'Select topic' box and entering 'bad_coupon' into the 'Apply Filter' box.

If the search delivers no results, 1) make sure you have typed the name of the variable correctly; 2) try selecting a different variable group.

To choose a place for a new language variable:

a. Select the name of the group to which you want the new variable to belong from the 'Select topic' drop-down box.
b. Wait for the page to be refreshed. All the variables of the selected group will be listed in the 'Edit language entries' form. Now you can add a new variable to this list.

7. Perform the necessary editing operation in the 'Edit language entries' form.

To edit the value of the found language variable:

a. Edit the language variable description in the 'Description' field.
b. Correct the text in the 'Value' field. You can use HTML markup tags to format the text.
c. Click on **Apply changes** at the bottom of the 'Edit language entries' form.

To delete the found variable:

Click on the **Delete** button opposite the variable.

To add a new variable:

a. Scroll down to the 'Add new entry' section of the 'Edit language entries' form.

b. Enter a name for the new variable into the 'Variable' field.

c. Provide a description of the variable in the 'Description' field.

d. Enter the text that will be stored in the variable being created into the 'Value' field.

e. Click on **Apply changes** at the bottom of the 'Edit language entries' form.

Picture 7: 'Edit language variables' form.

Multilingual support

Companies doing business in a multicultural market will probably find useful X-Cart's ability to support multiple languages. When your store has more than one languages installed, the users can choose in which language they want to view the store pages.

Initially, X-Cart 4.x.x has only one language installed - English. If you need your store to support other languages, you will need to do one of the following:

• translate the interface of your store from English into the desired languages via X-Cart administrative interface;

- export the English language from X-Cart to a CSV file, make translations of the file into the desired languages and import the resulting CSV files into X-Cart.

Please note that some X-Cart users already have language packs (CSV files) for languages other than English which they might want to give away or sell. You can try to obtain the desired language packs via X-Cart community forum: http://forum.x-cart.com, see: 'Internationalization and Localization'.

You may keep as many languages simultaneously installed as necessary.

Default admin/customer languages

When the number of languages installed at your store becomes more than one, you will be supposed to choose the *default customer* and *admin languages.* A default language is a language in which the interface appears to a user when the user comes to the store for the first time. The default customer language defines what language is used by default in the store customer zone and - if X-Affiliate add-on module is used - in the partner zone. The default admin language affects the text of the store administrative zones: admin and provider. Initially, the default language for any of the X-Cart zones is English. If you need a different language to be used as the default one in a certain zone, you can change the settings in the 'Default languages' form.

To change the admin/customer default language:

1. In the 'Default languages' form, select the default customer language (for customers/ partners) and the default admin language (for admins/providers).

   Picture 8: 'Default languages' form.

2. Click on Update.

Note. Email notifications to the Orders department are always sent in the default admin language.

Language selector

When a user logs into an X-Cart zone for the first time, he sees the interface of that zone in the default language. However, in any of the X-Cart zones there is a language selector (a drop-down box located at the top right hand corner of the screen) which allows the user to dynamically switch to a different language:

Selecting a language from the language selector drop-down box affects only the current zone (For example, if both the default admin and customer languages are English, and a user selects

French from the language selector in the customer zone, the store language becomes French only in the customer zone of the store and only in the browser of the user who made the selection).

Note. The language selector affects the language of email notifications sent to customers, providers and partners. Users of these types receive email notifications in the language which is selected as current in their X-Cart zone when X-Cart generates the corresponding notifications.

Translating X-Cart into other languages

To translate the store interface from English into another language via X-Cart administrative interface:

1. Go to the 'Edit languages' section of the Administrative zone (Administration menu-> Languages).

Picture 9: 'Edit languages' section.

2. Scroll down to the 'Add/Update language' form.

Picture 10: 'Add/Update language' form.

3. Use the 'Choose a language' drop-down box in the 'Add/Update language' form to select the name of the target language. For example, if you want to translate your store interface into Russian, select *Russian*.

Picture 11: Russian language has been selected from the 'Choose a language' box.

Note. If the name for the desired language is not listed in the 'Choose a language' box, it means that you first need to add a new language variable to the variable group Languages and assign a value (the name of the language) to that variable.

Do not do anything about the fields 'Import file (optional)' and 'CSV delimiter'.

4. Click on the **Add/Update language** button at the bottom of the form. X-Cart will create a copy of the set of language variables which constitute the English version of X-Cart. As a result, you will get a set of English variables named as your target language (For example, if you are translating your store interface into Russian, you will get a copy of the English language named *Russian*). Wait for the page to be refreshed.

5. Make sure the charset specified in the 'Edit language' form is correct. If not, enter the necessary charset code and click on **Change**.

Picture 12: Character encoding Windows-1251 is specified for the Russian alphabet.

6. Use the language selector to switch the current language of the Administrative zone to the target language (in our example, Russian).
7. Enable your computer to type in the selected language.
8. Edit the necessary language variables translating them into the selected language. To edit a language variable:
a. Find the necessary variable in the 'Edit language entries' form.
b. Translate the variable description.
c. Translate the variable value.
d. Click on **Apply changes**.
9. When all the necessary language variables are translated, make sure the translation has been successful: go to the store zone which you want your store users to be able to view in the selected language and use the language selector to switch the current language of that zone to that language. If all the variables you have translated in that zone are displayed properly in the target language, you can open the store to visitors.

To add a language using export/import functionality:
1. Prepare a CSV file with the necessary language for import into X-Cart:

   • Obtain a language pack at X-Cart community forum.

      or

   • Create a language pack by yourself:
a. Go to the 'Edit languages' section of the Administrative zone (Administration menu-> Languages).
b. Use the 'Choose a language' drop-down box in the 'Add new language' form to select the language you want to add. Leave the 'Import file (optional)' field blank.
c. Click on **Add/Update language**. The new language will be added (this new language will have the name you selected at from the 'Choose a language' drop-down box and will consist of variables with English values). Wait for the page to be refreshed.
d. Use the field 'CSV delimiter' in the 'Edit language' form to set the type of delimiter you would like to be used in the CSV file to which the language will be exported.
e. Click on the **Export** button. Save the language CSV file.
f. Open the file for editing. Translate the values of the language variables from English into the desired language. Save the CSV file.
2. Import the language pack into X-Cart:
a. Go to the 'Edit languages' section of the Administrative zone (Administration menu-> Languages).
b. Select the language you want to add from the 'Choose a language' drop-down box in the 'Add new language' form.
c. Click on **Browse** and select the CSV file with the translated language variables.
d. Select the type of delimiter used in that CSV file.
e. Click on **Add/Update language**.

Note. The same algorythm may be used to update languages.

Deleting/disabling languages

To delete/disable a language:

1. In the 'Edit language' form select the language you want to delete from the 'Language' drop-down box.
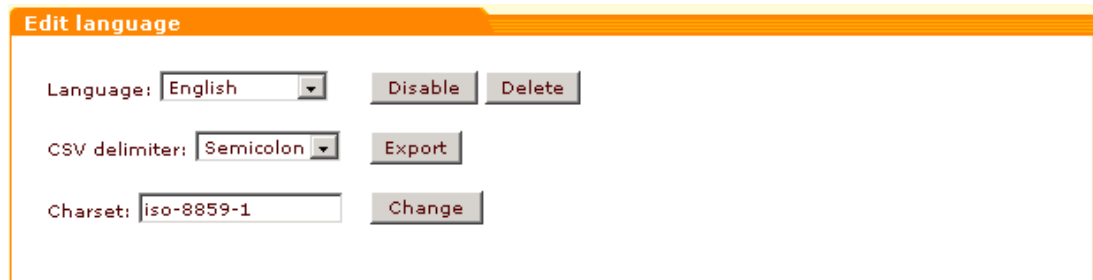
Picture 13: 'Edit language' form.

2. Wait for the page to be refreshed. The look of the 'Edit language' form will change.

Picture 14: 'Edit language' form after page refresh.

If you need to disable the selected language, click on **Disable**. The language will be removed from the language selector so that your store users will not be able to select it. To re-enable a disabled language, click on **Enable**.

If you want to delete the selected language, click on **Delete**. Confirm your wish to permanently remove the language from your system. All the language variable values for this language will be removed.

Note. Please be aware that at least one language should be enabled in your store at all times. Do not disable or delete a language if it is the last one available. Disabling or deleting the last language will result in destruction of the whole store.

Related topics:

Webmaster mode

Editing Templates

6.4.9   Modifying the Look of Your Store

6.4.9.1   General Knowledge

6.4.9.1.1 HTML Basics

> **Note**: The HTML Basics, CSS Basics and Smarty Template Engine topics are aimed at those who want to modify templates and change the look of the shop by themselves. The HTML code together with the Smarty code is implemented in all templates. If you want to change templates you should have knowledge of HTML, CSS and Smarty basics. If you are not interested in learning HTML and programming you can order Design & Design integration services at www.x-cart.com.

All Web pages contain instructions on how to be displayed and the browser displays the page by reading these instructions. The most common display instructions are called HTML tags. An HTML file is a text file containing small markup tags. HTML tags look like this `<p>This is a Paragraph</p>`

HTML document structure:

Here is an example of an HTML document:

```
<html>
<head>
<title>X-Cart help example</title>
</head>
<body>
This is my first HTML page. <b>This text is bold</b>
</body>
</html>
```

Explanation:

The first tag in your HTML document is **<html>**. This tag tells your browser that this is the beginning of an HTML document. The last tag in your document is **</html>**. This tag tells your browser that this is the end of the HTML document.

The text between the tags **<head>** and **</head>** is header information. Header information is not displayed in the browser window.

The text between the **<title>** tags is the title of your document. The title is displayed in your browser's caption.

The text between the **<body>** tags is the text that will be displayed in your browser.

The text between the **** and **** tags will be displayed in a bold font.

HTML Elements and Tags

HTML elements are defined by tags. The most important tags in HTML are tags that define headings, paragraphs, line breaks, hyperlinks to link to another document, images, tables, lists and forms.

- HTML tags are used to mark-up HTML elements

- HTML tags are surrounded by the two characters **<** and **>**, the surrounding characters are called angle brackets

- HTML tags normally come in pairs like **** and ****

- The first tag in a pair is the **start** tag, the second tag is the **end** tag

- The text between the start and end tags is the element content

- HTML tags are not case sensitive, **<b>** means the same as **<B>**

Basic HTML tags:

- Headings are defined by the **<h1>** to **<h6>** tags. **<h1>** defines the largest heading. **<h6>** defines the smallest heading.

- Paragraphs are defined by the **<p>** tag.

- The **
** tag is used when you want to end a line, but don't want to start a new paragraph. The **
** tag forces a line break wherever you place it.

- The **<b>** and **<i>** tags can be used to format your text or you can use styles to format text.

- The **<a>** tag is used when you want to create a link, for example:

```
<a href="home.php">Home</a>
```

```
This is a link to the homepage on this Web site.
```

```
<a href="http://www.x-cart.com/">X-Cart</a>
```

```
This is a link to a page on the World Wide Web.
```

- Use the <img> tag to display images on your Web page, for example:

```
<img src="logo.gif" alt="logo">
```

- Tables are defined with the **<table>** tag. A table is divided into rows (with the **<tr>** tag), and each row is divided into data cells (with the **<td>** tag). The letters td stands for "table data," which is the content of a data cell. A data cell can contain text, images, lists, paragraphs, forms, horizontal rules, tables, etc.

```
<table border="1">
<tr>
<td>Position:</td>
<td>Price:</td>
</tr>
<tr>
<td>1</td>
<td>450</td>
```

```
</tr>
<tr>
<td>2</td>
<td>500</td>
</tr>
</table>
```

Here is how it looks in a browser::

Position:	Price:
1	450
2	500

- HTML supports ordered, unordered and definition lists. The unordered list items are marked with bullets and the ordered list items are marked with numbers.
  An unordered list starts with the **<ul>** tag. Each list item starts with the **<li>** tag. for example:

```
<ul>
<li>Books</li>
<li>Magazines</li>
</ul>
```

Here is how it looks in a browser:

- Books

- Magazines

An ordered list starts with the **<ol>** tag. Each list item starts with the **<li>** tag. for example:

```
<ol>
<li>Books</li>
<li>Magazines</li>
</ol>
```

Here is how it looks in a browser:

1. Books
2. Magazines

- A form is an area that can contain form elements. Form elements are elements that allow the user to enter information (like text fields, textarea fields, drop-down menus, radio buttons, check boxes, etc.) in a form. A form is defined with the **<form>** tag for example:

```
<form method="get" action="testtest.php">
First name: <input type="text" name="firstname"><br>
Last name: <input type="text" name="lastname">
</form>
```

Here is how it looks in a browser:

First name: [TEditFormControlObj]

Last name: [TEditFormControlObj]

HTML Tag Attributes

Tags can have attributes. Attributes can provide additional information about the HTML elements on your page.

This tag defines the body element of your HTML page: **<body>**. With an added bgcolor attribute, you can tell the browser that the background color of your page should be red, like this: **<body bgcolor="red">**.

This tag defines an HTML table: **<table>**. With an added border attribute, you can tell the browser that the table should have no borders: **<table border="0">**

Attributes always come in name/value pairs like this: name="value".

Attributes are always added to the start tag of an HTML element.

Further reading:

W3C HTML start page: http://www.w3c.org/MarkUp/

HTML Validation Service: http://validator.w3.org/

6.4.9.1.2 CSS Basics

Note. The HTML Basics, CSS Basics and Smarty Template Engine topics are aimed at those who want to modify templates and change the look of the shop by themselves. The HTML code together with the Smarty code is implemented in all templates. If you want to change templates you should know HTML, CSS and Smarty basics. If you are not interested in learning HTML and programming you can order Design & Design integration services at www.x-cart.com.

CSS stands for **C**ascading **S**tyle **S**heets. Styles define how to display HTML elements.

Note. X-Cart styles are stored in **skin1.css** Style Sheet. You can modify this file and change colors and other properties and change the look of your store by using built-in template editor.

Syntax

The CSS syntax is made up of three parts: a selector, a property and a value: selector
{property: value} for example:

```
body {color: #FFFF99}
p {font-family: "sans serif"}
p {text-align: center; color: red}
```

The class Attribute

With the class attribute you can define different styles for the same element. Say that you would like to have two types of paragraphs in your document: one red text color paragraph, and one blue text color paragraph. Here is how you can do it with styles:

```
p.redtext {color: red}
p.bluetext {color: blue}
```

You have to use the class attribute in your HTML document:

```
<p class="redtext">
This paragraph text will be red.
</p>
<p class="bluetext">
This paragraph text will be blue.
</p>
```

You can also omit the tag name in the selector to define a style that can be used by a lot of elements:

```
.redtext {color: red}
```

CSS allow you to control the appearance of a text. It is possible to change the color of a text, increase or decrease the space between characters in the text, align the text, decorate it, indent the first line in the text, and more. You can control the background color margin, border and other properties of an element.

Further reading:

W3C Cascading Style Sheets homepage: http://www.w3.org/Style/CSS/

Validation service: http://jigsaw.w3.org/css-validator/

6.4.9.1.3 Smarty template engine

Note: The HTML Basics, CSS Basics and Smarty Template Engine topics are aimed at those who want to modify templates and change the look of the shop by themselves. The HTML code together with the Smarty code is implemented in all templates. If you want to change templates you should know HTML, CSS and Smarty basics. If you are not interested in learning HTML and programming you can order Design & Design integration services at www.x-cart.com.

Smarty is a template engine for PHP. Smarty templates are HTML files enhanced with the Smarty tags. More specifically, Smarty facilitates a manageable way to separate application logic and content from its presentation. The programmer can make changes to the application logic without the need to restructure templates, and the template designer can make templates changes without breaking the application logic. That's why we chose the Smarty template for our

X-Cart shopping application.

Syntax

Here is a brief overview of the Smarty syntax:

- All Smarty template tags are enclosed within delimiters. By default, these delimiters are **{** and **}**. X-cart template system uses default delimiters.

- **Comments** - Template comments are surrounded by asterisks, and that is surrounded by the delimiter tags like this:

```
{* this is a comment *}
```

- **Functions** - Smarty comes with several built-in functions but you can also use custom functions. Both built-in functions and custom functions have the same syntax in the templates. Built-in functions provide basic functionality, such as **{if}**, **{section}** and **{strip}**. They cannot be modified. Custom functions are additional functions implemented via plugins. They can be modified to your liking, or you can add new ones. **{html_options}** and **{html_select_date}** are examples of custom functions. Functions are processed and displayed by enclosing the function and its attributes into delimiters like this:

```
{funcname attr1="val" attr2="val"}
{* for example functions: include, if, else *}
{include file="location.tpl" last_location=$lng.lbl_payment_details}
{if $payment_data.payment_method ne ""}
<h3>{$lng.lbl_checkout_step3}</h3>
{else}
<h3>{$lng.lbl_checkout_step2}</h3>
{/if}
{include file="customer/main/cart_contents.tpl"}
```

- **Attributes** - Most of the functions take attributes that specify or modify their behavior. Attributes to Smarty functions are much like HTML attributes. Static values don't have to be enclosed in quotes, but it is recommended for literal strings. Variables may also be used, and should not be in quotes.

```
{include file="header.tpl"}
{include file=$includeFile}
{include file=#includeFile#}
{html_select_date display_days=yes}
<SELECT name=company>
{html_options values=$vals selected=$selected output=$output}
</SELECT>
```

- **Variables** - Smarty has several different types of variables: assigned from PHP, loaded from config file and {$smarty} reserved variable. The type of the variable depends on what symbol it is prefixed with (or enclosed within).
Variable in Smarty can be either displayed directly or used as arguments for function

attributes and modifiers, inside conditional expressions, etc. To print a variable, simply enclose it in the delimiters so that it is the only thing contained between them. Examples:

```
{* Variables that are assigned from PHP are referenced by preceding
them with a dollar sign $ *}
{$Name}
{* You can also reference associative array variables that are assigned
from PHP by specifying the key after the '.' (period) symbol. *}
{$Contacts[row].Phone}
{* Variables that are loaded from the config files are referenced by
enclosing them within hash marks (#). *}
<body bgcolor="{#bgcolor#}">
```

- **Variable Modifiers** - Variable modifiers can be applied to any variable to alter its contents. To apply a modifier, specify the variable followed by the | (pipe) and the modifier name. A modifier may accept additional parameters that affect its behavior. These parameters follow the modifier name and are separated by : (colon), examples:

```
{* Uppercase the title *}
<h2>{$title|upper}</h2>
{* Truncate the topic to 40 characters use ... at the end *}
Topic: {$topic|truncate:40:"..."}
```

Further reading:

The Smarty online documentation: http://smarty.php.net/docs.php

The Smarty resources: http://smarty.php.net/resources.php

6.4.9.1.4 Working with Images

For an effective presentation of your products and your shop you need good images. We do not recommend you to use huge logo files or giant product images. Keep in mind that people will not wait to see your site, or buy anything, if it takes your site too long to load.

Recommended image file formats:

- **GIF - Graphics Interchange Format** - pictures store single or multiple raster image data in 8-bit, or 256 colors. GIF pictures support transparency, compression, interlacing, and multiple-image pictures. GIF pictures are suitable for logos and animations.

- **JPG - Joint Photographic Experts Group (JPEG)** - pictures store a single raster image in 24-bit color. JPEG is a platform-independent format that supports the highest levels of compression; however, this compression is lossy. JPG pictures are the best for photos and we recommend you to use this file format with quality "40" for your product pictures.

Getting the images

You can get images for your store from a lot of different sources.

You can:

- use a digital camera and take photos of your products.

- use a usual camera to take photos of the products and scan the photos afterwards.

- scan photos from catalogues and user manuals.

- use pictures of a product which has supplementary CD.

- use pictures of the products some producers offer at their web sites.

Note. Your primary consideration should be that of ownership of the materials you are going to use. Copyright infringement is an important issue in Internet design. The use of other people's materials without their permission or without compensating them in some way may be considered a criminal activity. Copyright infringement, plagiarism, theft, misuse or misappropriation of intellectual property, inappropriate use of images -- the courts are full of these types of cases involving the Internet. If you have any doubts, ask permission BEFORE you use a graphic.

Getting the file ready for the web.

Whatever the source of image is, CD, digital camera, scanning, or Internet it is very likely you are going to have to reduce its size and resolution for web viewing. Using your image editor:
1. Crop (as close as you can to the subject of the image).
2. Resize (if necessary).
3. Save as image (choose the appropriate file format GIF or JPG)

Tip: Always keep the original file for further use if necessary.

6.4.9.2   Editing Templates

X-Cart shopping software has built-in development environment which allows you to easily access and modify the templates from which your store is built. X-Cart templates engine is very flexible and extremely configurable, so you can completely change the look and feel of your site according to your taste and actual needs. But be careful! The powerful flexibility requires basic HTML, CSS and Smarty PHP template engine knowledge and experience.

When working with templates it is useful to enable X-Cart Debugging console: General settings > General options. The Debugging console enables you to view the template structure of the page at which your store is opened currently. The template structure of a page is presented in the form of a tree to show the hierarchy of the templates from which it is assembled. admin/home.tpl,

provider/home.tpl and customer/home.tpl are the main templates which include other templates (which in their turn can also include templates).

For example, if we use the Debugging console to explore the template structure of the customer zone front page, the result may be something like this:

Picture 1: *Debugging console (Customer zone front page template structure).*


```
X-Cart Debugging Console - Microsoft Internet Explorer          _□×

                    included templates & config files :
▶ customer/home.tpl
▶ skin1.conf [] global
    ▶ meta.tpl
    ▶ rectangle_top.tpl
    ▶ head.tpl
        ▶ customer/top_menu.tpl
            ▶ customer/tab.tpl
            ▶ customer/tab.tpl
            ▶ customer/tab.tpl
        ▶ customer/search.tpl
            ▶ buttons/search_head.tpl
                ▶ buttons/go_image.tpl
    ▶ customer/categories.tpl
        ▶ menu.tpl
    ▶ modules/Bestsellers/menu_bestsellers.tpl
        ▶ menu.tpl
    ▶ modules/Manufacturers/menu_manufacturers.tp
    ▶ customer/special.tpl
        ▶ modules/Gift_Certificates/gc_menu.tpl
        ▶ modules/Gift_Registry/giftreg_menu.tpl
        ▶ menu.tpl
    ▶ help.tpl
        ▶ pages_menu.tpl
        ▶ menu.tpl
    ▶ location.tpl
    ▶ dialog_message.tpl
    ▶ customer/home_main.tpl
        ▶ customer/main/welcome.tpl
            ▶ customer/main/featured.tpl
                ▶ customer/main/products.tpl
                    ▶ product_thumbnail.tpl
                    ▶ currency.tpl
                    ▶ currency.tpl
                    ▶ customer/main/alter_currency_va
                    ▶ customer/main/buy_now.tpl
```

Note. What you see in your actual debugging console may not look exactly like in the picture.

If you look at the picture of the customer front end below you will notice that this page contains several distinctive areas the representation of which depends on certain templates.

Picture 2: *Customer zone front page template structure.*

Knowing what template is 'responsible' for the look of the area you would like to modify enables you to modify the necessary template and change the look of your store.

You can click on the name of a template in the X-Cart Debugging console window to get quick access to editing this template.

Another way to edit templates is to use **Edit templates** from the Administration menu. It opens the 'Browse templates' section. You can use either the preset files menu or the 'Browse templates' form to access the files you need.

Picture 3: Preset files menu.

Picture 4: Browse templates form.

----

break---

The 'Browse templates' section allows you to:

- Create a new file
- Create a new directory
- Create a copy of a file
- Delete a file or a directory
- Upload a file from the local computer
- Edit a template
- Restore all files
- Compile templates to use only one language

To create a new file:

1. Click on **Edit templates** in the Administration menu, the 'Browse templates' form will appear.
2. Browse to the necessary location (If you want your file to be located in one of the directories, click on the name of the directory).

3. In the 'Create new file' subsection enter the name of the file you want to create into the 'New file name' text box.
4. Click on **Create** next to it and a new empty file will be created.

To create a new directory:

1. Click on **Edit templates** in the Administration menu, the 'Browse templates' form will appear.
2. Browse to the necessary location (If you want to create a new sub-directory in one of the directories, click on the name of the directory).
3. In the 'Create new directory' subsection enter the name of the directory/sub-directory you want to create into the 'New directory name' text box.
4. Click on **Create** next to it and a new directory will be created.

To create a copy of a file:

1. Click on **Edit templates** in the Administration menu, the 'Browse templates' form will appear.
2. On the 'Browse templates' form select the radio button next to the file you want to copy.
3. In the 'Copy selected file to...' subsection enter the location and the name of the copy you want to create (e.g. `'main/homebackup.tpl'`) into the 'Copy file name' text box.
4. Click on **Copy** next to it and a copy of the file will be created.

To delete a file or a directory:

1. Click on **Edit templates** in the Administration menu, the 'Browse templates' form will appear.
2. On the 'Browse templates' form select the radio button next to the file or directory you want to delete.
3. Click on **Delete selected.** Confirm the deletion.

Note. When you delete a directory all the files and sub-directories under that directory are deleted.

To upload a file from the local computer:

1. Click on **Edit templates** in the Administration menu, the 'Browse templates' form will appear.
2. In the 'Upload file to the current directory' subsection click on **Browse**, locate the file you want to upload and click on **Open**.
3. Click on **Upload**.

If the file with the same name already exists in the selected directory, you can select the 'Replace file if exists' check box.

Note. The maximum file size that can be uploaded is 2Mb.

To edit a template:

If you want to edit templates successfully, you need to possess basic knowledge and experience in HTML, CSS and Smarty PHP template engine.

1. Click on **Edit templates** in the Administration menu, the 'Browse templates' form will appear.
2. Locate the file you would like to edit.
3. Click on the name of the file. The 'Edit file' form will appear.

Picture 5: Edit file form.

4. Edit the file.
5. Do one of the following:

   • Click on **Save** to save the changes.

   • Click on **Cancel** to cancel editing the file.

   • Save the file and click on **Preview** to see the file preview. Select the 'Use default stylesheet for template preview' if necessary.

   • Click on the **Restore file** button to restore the original file if you have any problems while editing the template.

> **Warning**. The preview of some file may display incomplete template due to the lack of real-time data.

To restore all files:
1. Click on **Edit templates** in the Administration menu, the 'Browse templates' form will appear.
2. Click on **Restore All** and all the templates will be restored.

To compile templates to use only one language:

If you do not need multilingual support for your store, you can compile templates to use only one selected language. The compilation of templates simplifies the process of editing templates.

1. Click on **Edit templates** in the Administration menu, the 'Browse templates' form will appear.
2. From the drop-down list select the language which you want to use in the compiled templates.
3. Click on **Compile templates**.

> **Warning**. If you compile the templates at your store to use only one language all the text messages will be editable from the template editor directly, but you will not be able to edit the text messages using the Languages menu any more.

> **Note**. The compilation process can take up several minutes. If you want to restore the original templates, click on **Restore All**.

Related topics:
[Webmaster mode](#)
[Working with Languages](#)

6.4.9.3   Webmaster mode

Webmaster mode facilitates the process of changing language variables (denoted as "$lng.XXX" in templates) enabling you to change these values in WYSIWYG mode.

To start Webmaster mode, click on **Webmaster mode** in the Administration menu, then click on the **Start Webmaster mode** button.

> **Note**. Webmaster mode will not work with compiled templates.

Usage

Go to the page you want to change. Additional "templates" window (the so-called Debugging

Console) will appear with the list of all the templates included into the page.

Picture 1: X-Cart Debugging Console.

You can call the template editor from the debugging console by clicking on a template in X-Cart Debugging Console window.

Notice that the browser status line (at the bottom) changes when you move the mouse over the site. Depending on the position of your mouse it indicates (a) the template name and (b) the label name. To change the label, click on it. If the label is under a hyperlink, move your mouse over it (its name appears at the bottom) and press "e" (Edit) on the keyboard. Label dialog will appear. You can (1) preview the site after setting the label, (2) save the text into the database, (3) copy the label name into the clipboard (IE only) or (4) cancel the changes and close the label dialog.

Picture 2: Label dialog.

More tips:

- The language variables must be set in the language that is selected for your site as current;

- Close any template windows & label windows before entering Webmaster mode again;

- To quit Webmaster mode, go to the admin zone, click on "Close Webmaster mode";

- Webmaster mode is based on sessions: it applies only to the computer it has been set up on. It doesn't affect the website itself;

- Use IE5 or later / NN6 or later to work in Webmaster mode.

Related topics:

Working with Languages

6.4.10   Selecting Modules

The X-Cart shopping cart software has a lot of modules. Some of them are built-in and are included in every X-Cart distribution. The others can be purchased separately.

The modular structure of X-Cart allows you to enable or disable the functional parts of your store according to your actual needs.

To enable the modules you need, go to the 'Modules' section of X-Cart.

1. Click on **Modules** in the Administration menu, the 'Modules' section will be opened.
2. Select the check boxes next to the names of the modules that need to be enabled.

- **Advanced Order Management** - This module allows you to modify your customers' orders after they have been placed (ordered products and gift certificates, customer information and order totals).

- **Advanced Statistics** - When this module is enabled your shop gathers advanced statistical data. For more information see Viewing Statistics.

- **Antifraud -** This module validates a customer's address during checkout and places a note into the order details.

- **Bestsellers** - This module enables bestsellers list (shows to customers which products have been sold the most often, if there have been no sales - which products have got the largest number of views). Requires Advanced Statistics module to be enabled.

- **Customer Reviews** - Allows voting and writing reviews on products.

- **Detailed Product Images** - If enabled, detailed product images can be added for your customers to see on the customer front end.

- **Discount Coupons** - If enabled, special coupons can be defined allowing your customers to get discounts when they order products from your store.

- **Egoods** - Activate this module, if you wish to sell electronically distributed products like software, music, movies, e-books etc.

- **Extra Fields** - If enabled, extra fields can be added to the product table.

- **Fancy Categories** - This module enables you to change the look of your categories menu (several alternative styles are provided).

- **Froogle -** This module allows to export products in Froogle compatible format

- **Gift Certificates** - If enabled, your customers can purchase gift certificates.

- **Gift Registry -** This module allows your customers to manage event lists and inform their friends about the products they would like to be bought. Wishlist module must be turned on.

- **Greet Visitor** - This module greets your customer by the name when he/she returns to your site. The customer's name is stored in the cookie on the customer's computer.

- **Interneka** - This module enables Interneka Affiliate Tracking Software support.

- **Manufacturers** - This module allows to classify products by the manufacturers.

- **News Management** - This module allows you to create and manage news lists.

- **Order Tracking** - If enabled, you can track order shipments from the UPS, USPS and FedEx postal services.

- **Product Configurator** - This module provides a good method for selling complex systems and sets. It allows your customers to assemble a composite product from a set of components. You can set compatibility rules that will allow your customers to build a completely functional product on their own.

- **Product Options** - If enabled, providers can add product options. For more information see Adding and removing product options.

- **QuickBooks** - This module enables you to export orders in QuickBooks format.

- **Recommended Products** - This module enables an auto-generated list of recommended products ('Visitors who bought this product also bought:...'-type of list).

- **Stop List** - This module allows you to protect your store from an external attack with stolen credit card numbers.

- **Simple Mode** - (PRO edition only) This module enables you to use an operational mode in which providers have administrator privileges. After activating Simple Mode log out of the administrative zone and log in as provider. You need to have a valid provider account to disable Simple Mode and switch back to PRO.

- **Subscriptions** - This module enables the subscription feature for products.

- **Upselling Products** - This module enables providers to create a list of products related to a product.

- **UPS Online® Tools** - This module provides access to UPS OnLine ® Tools.

- **Users online** - This module enables you to track the number of users online.

- **Wholesale Trading** - If enabled, wholesale product prices can be defined.

- **Wishlist** - This module enables the wish list feature for registered customers.

- **XAffiliate -** This module enables affiliate programs for your store.

3. Click on **Update** to save the changes.

Note. Some modules require additional configuration through General Settings.

Related topics:

General Settings

Modules Options

6.4.11   Defining Payment Methods

X-Cart shopping cart software has a number of built-in common payment methods. You need to define which of these payment methods your customers will be able to use when making orders at your store. If you are planning to enable your customers to pay for their orders online, you need to set up some payment gateways: credit card processors (if you are going to use Credit Card payment method), check processors (if you are going to use Pay by Check payment method) and payment systems (like PayPal, Nochex, etc).

X-Cart 'Payment methods' section allows you to activate the necessary payment methods and to set up the necessary payment gateways. It can be accessed by clicking on **Payment methods** in the Administration menu.

This page also allows you to enable HTTPS protocol for every payment method that needs this type of security. If you are using HTTPS server, make sure you have properly set up $https_location variable in config.php file.

Payment methods

To activate the payment methods you want to make available in your store:

1. Click on **Payment methods** in the Administration menu. The 'Payment methods' form will

appear.

Picture 1: *Payment methods form*

2. Select the Active check boxes next to the methods you want to be available to your customers.
3. If necessary, add special instructions for each of the selected payment methods (**SPECIAL INSTRUCTIONS** column). These instructions will be shown to your customers during checkout. They can be used to pass along important information (E.g.: "Make checks payable to...").
4. Select a protocol for each of the payment methods. HTTPS is strongly recommended for the payment methods where security must be ensured (customers are highly unlikely to be delighted if you ask them to send their credit card information via HTTP protocol).
5. For each of the methods select the membership type to which it should be available. You can select *Premium, Wholesale* (set by default) or any other membership level that you defined.
6. Define the order in which the payment methods will be displayed to your customer by entering the appropriate position numbers.
7. Click on **Update**.

To disable a payment method, unselect the check box next to its name in the list and click on

Update.

Payment gateways

To use a payment gateway you need an online merchant account with one of our supported processing companies.

Payment gateways: CC processing, Check processing and Payment systems

To set up a payment gateway:

1. Click on **Payment gateways** in the Administration menu. Scroll down to the 'Payment gateways' form.

   Picture 2: *Payment gateways form.*

2. From the 'Payment gateways' drop-down list select the name of the payment gateway you want to set up (all the payment gateways in the drop-down list are divided into three subsections: Credit Card processors, Check processors and Payment systems). Click on **Add**. The payment gateway will be added to the list of methods in the 'Payment methods' form.

   Picture 3: *'2 Checkout' credit card processor has been added to the list in the 'Payment methods' form (Example).*

Payment methods

Check all / Uncheck all

METHODS	SPECIAL INSTRUCTIONS	PROTOCOL	MEMBERSHIP	POS.
☐ Credit Card	Visa, Mastercard, American Express	HTTP	All	0
☑ Check	Check payment	HTTP	All	0
☑ Gift Certificate		HTTP	All	15
☑ Phone Ordering	Phone: (555) 555-5555	HTTP	All	20
☑ Fax Ordering	Fax: (555) 555-5555	HTTP	All	25
☑ Money Order	US Banks Only	HTTP	All	28
☐ C.O.D	Cashiers Check or Cash Only	HTTP	All	29
☑ Purchase Order		HTTP	All	30
☐ Personal Check	US Funds only	HTTP	All	40
☐ Business Check	Drawn on US Bank and in US Dollars	HTTP	All	70
☐ Wire Transfer	Our bank account details you can find in help section	HTTP	All	80
☐ Government Check	US Funds Only	HTTP	All	100
☐ Traveler's Check	US Funds Only	HTTP	All	110
☐ 2Checkout		HTTP	All	999

Credit Card processor **2Checkout**: Configure | Delete

Update

3. Click the **Configure** link next to the name of the processor in the 'Payment methods' form.
4. Fill in the 'Settings' form for the chosen payment gateway using the information received when you got your Internet merchant account registered. Click on **Update**.
5. To activate the payment gateway, select the check box next to its name in the list of methods and click on **Update**.

To delete a payment gateway from the list of methods, click the **Delete** link.

Subscription processor

Note. Subscriptions module must be enabled in the 'Modules' section of the admin zone before you try to set up a subscription processor.

To set up a payment gateway:

1. Click on **Payment gateways** in the Administration menu. Scroll down to the 'Payment gateways' form.

Picture 4: Payment gateways form (Subscriptions module is enabled).

2. From the 'Subscription processor' drop-down list select the name of the processor you want to use for your subscriptions. There can be just one processor for subscriptions.
3. Click on **Continue**.
4. Configure the chosen processor by completing its 'Settings' form.
5. Click on **Update**.

Test/Live mode

Some payment gateways (like Authorize.Net, 2Checkout. Version 2, etc) can be set up to work in test or in live mode.

Live mode is the mode in which a payment gateway should normally work. In live mode all payment transactions are real and money is actually charged off your customers' accounts.

Test mode is provided for testing purposes only. In test mode payment gateways work the same way they are supposed to work in live mode, except that no actual payments are made.

It is highly recommended you test the work of the payment gateways you are going to use in your store before setting them to work in live mode.

Related topics:

General Settings

Setting up Membership Levels

Editing Credit Card Types

Managing Gift Certificates

Managing Subscriptions

6.4.12   Using Patch/Upgrade Center

6.4.12.1   Upgrading X-Cart Software

The 'Patch/Upgrade center' section of X-Cart allows you to upgrade your X-Cart software to newer versions via the administrative interface of your store using upgrade patchsets provided by X-Cart developers. An upgrade patchset normally contains new files, scripts and templates that appeared in the new version and need to be added to your X-Cart installation, and patch DIFF

files that describe changes that need to be made to the files that already exist in your X-Cart installation so they can be used in the new version (In UNIX world DIFF files are a standard way to apply changes/fixes to the program source code). There is a special program called 'patch' that reads DIFF files and applies changes described in them to the source code.

The success of the upgrade procedure depends on how much your X-Cart has been customized. If you modified any files to which the upgrade patch should be applied, upgrade may fail. If you experience any problems with upgrading your X-Cart, we can offer you commercial manual upgrade services.

If you are going to upgrade a live store it is highly recommended to create a test copy of your store, perform the upgrade procedure on this copy, test if the upgraded store works ok, and only then apply the upgrade to your real store.

IMPORTANT! It is recommended to make a backup copy of all PHP scripts, templates and create a database dump before applying any patches. Please use Patch/Upgrade function ONLY if you absolutely understand what you are doing.

Upgrade procedure

You can use the Patch/Upgrade center to upgrade your software to the newest versions, keeping your own X-Cart design. Using this feature you avoid installation and customization steps when upgrading.

Upgrade procedure consists of the following steps:
1. Make sure your server meets upgrade requirements. You need to have:

  • Upgrade patchset

  • Perl

  • Ability to change file permissions by request (in fact, you need a way to access your site via SSH or FTP).

  Note. Please note that on Windows systems path to Perl and path to the site MUST NOT contain spaces, otherwise you will not be able to do the upgrade. For example, if Perl is located in "C:\Program Files\etc...", X-Cart Patch/Upgrade utility will fail because of the space between the words "Program" and "Files".

2. **BACK UP YOUR STORE!**
3. Upload the upgrade archive onto the server into X-Cart root folder and uncompress the archive files.

   On Unix-based servers with terminal access you can do it using the following

   commands (depending on X-Cart version installed on your host (Gold or Pro):

   > cd xcart_folder

   > gunzip < x.x.x-x.x.x-gold_upgrade.tar.gz | tar -xvf -

      or

   > cd xcart_folder

   > gunzip < x.x.x-x.x.x-pro_upgrade.tar.gz | tar -xvf -

If you have FTP access only, uncompress the upgrade archive on your local machine (for example, using WinRar) and upload the files into X-Cart folder using your FTP client.

After that you will be able to find the upgrade patch in the 'upgrade' folder.

4. Open X-Cart Patch/Upgrade center. To do that log into X-Cart admin zone and select **Patch/Upgrade** in the Administration menu. If there are any problems that make using the upgrade feature impossible, the 'Patch/Upgrade center' page looks something like this:

Picture 1: *Error message.*

There is an error message saying what is wrong. You need to correct the error before you can proceed.

If everything is OK, you see the 'Upgrade' form showing the version of currently installed X-Cart.

Picture 2: *Upgrade form.*

If you unpacked the upgrade archive and uploaded it into X-Cart upgrade folder

successfully you will see the target version number (the number of X-Cart version you can upgrade your X-Cart to) and **Apply** button.

To start upgrading X-Cart click on **Apply**.

At this point it should be noted that patch application includes two basic steps:

1) testing patch applicability;

2) applying the upgrade patch.

5. **Testing patch applicability** (Step 1 of 2). First X-Cart will check the presence of executable permissions for the patch tool, then patch checksums and permissions for each file the upgrade patch must be applied to. In progress this check will look something like this:

Picture 3: Testing patch applicability (write permissions are not set).

Testing patch applicability and generation list of files could take several minutes, please be patient.

```
INSTALL ... non-writable
VERSION ... non-writable
smarty.php ... non-writable
top.inc.php ... non-writable
admin/category_modify.php ... non-writable
admin/configuration.php ... non-writable
admin/db_backup.php ... non-writable
admin/file_edit.php ... non-writable
admin/html_catalog.php ... non-writable
admin/pay_subscriptions.php ... non-writable
admin/product_modify.php ... non-writable
admin/states.php ... non-writable
admin/test_pgp.php ... non-writable
customer/recommends.php ... non-writable
customer/referer.php ... non-writable
customer/register.php ... non-writable
include/func.php ... non-writable
include/getfile.php ... non-writable
include/install.php ... non-writable
include/login.php ... non-writable
include/payment_method.php ... non-writable
include/product_modify.php ... non-writable
include/register.php ... non-writable
```

Then the results of patch applicability testing will be shown to you in the 'Applying patch' form.

Picture 4: Applying patch (Step 1 of 2: Testing patch applicability and generation of a list of files).

Applying patch

Step 1 of 2: Testing patch applicability and generation list of files

Result of the testing phase...

Checking patch.pl permissions: /u/mclap/public_html/test/xcart/patch.pl ... OK

File	Status
INSTALL	non-writable
VERSION	non-writable
smarty.php	non-writable
top.inc.php	non-writable
admin/category_modify.php	non-writable
admin/configuration.php	non-writable
admin/db_backup.php	non-writable
admin/file_edit.php	non-writable
admin/html_catalog.php	non-writable
admin/pay_subscriptions.php	non-writable
admin/product_modify.php	non-writable
admin/states.php	non-writable
admin/test_pgp.php	non-writable
customer/recommends.php	non-writable

--*break*--

skin1/help/contactus.tpl	OK
skin1/main/orders.tpl	OK
skin1/main/product_modify.tpl	OK
skin1/modules/Detailed_Product_Images/product_images.tpl	OK
skin1/modules/Extra_Fields/extra_fields.tpl	OK
skin1/modules/Gift_Certificates/giftcert.tpl	OK
skin1/modules/Gift_Certificates/giftcert_static.tpl	OK
skin1/modules/Product_Options/product_options.tpl	OK
skin1/provider/main/import.tpl	OK
skin1/provider/main/shipping_zones.tpl	OK

Status legend:
OK - file ready to patch,
checksum error - patch contents is corrupted,
non-writable - please give those files a write permissions,
not a file - the target is not a file,
not exists - file is missing,
could not patch - patch cannot be applied to this file automatically because it
was significantly modified, the patch for this file should be applied manually,
already patched - file was already patched.

Error!
One of files in your instalation got one of the following status: checksum error,
non-writable, not a file.
This is critical error. Patch/upgrade process cannot continue.
Please correct these errors.

<< Go back

If your Patch/Upgrade center detects any problems (errors - marked in red), you will not be able to proceed with upgrading your X-Cart software until these problems are resolved. You will have to go back, make the necessary corrections and run the patch applicability test once again.

In our case the problem is the absence of write permissions for the files that need to be patched. To set write permissions on Unix-based servers with a terminal access, issue the command:

> chmod 0666 script_file.php

If you have FTP access only, set write permissions using your FTP client.

After write permissions for all the necessary files have been set, next time you run the patch applicability test, it will look something like this:

Picture 5: *Testing patch applicability (write permissions are set).*

Testing patch applicability and generation list of files could take several minutes, please be patient.

```
INSTALL ... OK
VERSION ... OK
smarty.php ... OK
top.inc.php ... OK
admin/category_modify.php ... OK
admin/configuration.php ... OK
admin/db_backup.php ... OK
admin/file_edit.php ... OK
admin/html_catalog.php ... OK
admin/pay_subscriptions.php ... OK
admin/product_modify.php ... OK
admin/states.php ... OK
admin/test_pgp.php ... OK
customer/recommends.php ... OK
customer/referer.php ... OK
customer/register.php ... OK
include/func.php ... OK
include/getfile.php ... OK
include/install.php ... OK
include/login.php ... OK
include/payment_method.php ... OK
include/product_modify.php ... OK
include/register.php ... OK
include/sessions.php ... OK
```

If no more problems are encountered during the test, the test results will look something like this:

Picture 6: *Applying patch (Step 1 of 2: Testing patch applicability and generation of a list of files).*

Applying patch

Step 1 of 2: Testing patch applicability and generation list of files

Result of the testing phase...

Checking patch.pl permissions: /u/mclap/public_html/test/xcart/patch.pl ... OK

File	Status
INSTALL	OK
VERSION	OK
smarty.php	OK
top.inc.php	OK
admin/category_modify.php	OK
admin/configuration.php	OK
admin/db_backup.php	OK
admin/file_edit.php	OK
admin/html_catalog.php	OK
admin/pay_subscriptions.php	OK
admin/product_modify.php	OK
admin/states.php	OK
admin/test_pgp.php	OK
customer/recommends.php	OK

--break--

Status legend:
OK - file ready to patch,
checksum error - patch contents is corrupted,
non-writable - please give those files a write permissions,
not a file - the target is not a file,
not exists - file is missing,
could not patch - patch cannot be applied to this file automatically because it
was significantly modified, the patch for this file should be applied manually,
already patched - file was already patched.

Note:
Files which are not exists and already patched will be ignored.

Patch text:

```
Index: INSTALL
====================================
====================================
--- INSTALL          5 Feb 2004 12:25:43 -0000
          1.46.2.2
+++ INSTALL          27 Apr 2004 06:05:29 -0000
          1.46.2.3
@@ -1,7 +1,7 @@
 X-Cart Installation Manual
 ==========================
```

[<< Go back]   [Apply patch >>]

This is the conclusion of the testing stage. Now you can proceed to actually applying your upgrade patch. Click on **Apply patch** to go to the following step in the upgrade process.

But what if after setting write permissions you still get errors?

For example, you have set the necessary write permissions. While running the patch applicability test you get the 'could not patch' error:

Picture 7: Testing patch applicability ('could not patch' error).

Testing patch applicability and generation list of files could take several minutes, please be patient.

```
INSTALL ... OK
VERSION ... could not patch
smarty.php ... OK
top.inc.php ... OK
admin/category_modify.php ... OK
admin/configuration.php ... OK
admin/db_backup.php ... OK
admin/file_edit.php ... OK
admin/html_catalog.php ... OK
admin/pay_subscriptions.php ... OK
admin/product_modify.php ... OK
admin/states.php ... OK
admin/test_pgp.php ... OK
customer/recommends.php ... OK
customer/referer.php ... OK
customer/register.php ... OK
include/func.php ... OK
include/getfile.php ... OK
include/install.php ... OK
include/login.php ... OK
include/payment_method.php ... OK
include/product_modify.php ... OK
include/register.php ... OK
include/sessions.php ... OK
```

The applicability test results warn you that during the test some files got the status '*could not patch*', which means that the upgrade patch cannot be applied to these files automatically.

Picture 8: Applying patch (Step 1 of 2: Testing patch applicability and generation of a list of files).

Applying patch

Step 1 of 2: Testing patch applicability and generation list of files

Result of the testing phase...

Checking patch.pl permissions: /u/mclap/public_html/test/xcart/patch.pl ... OK

File	Status
INSTALL	OK
VERSION	could not patch
smarty.php	OK
top.inc.php	OK
admin/category_modify.php	OK
admin/configuration.php	OK
admin/db_backup.php	OK
admin/file_edit.php	OK
admin/html_catalog.php	OK
admin/pay_subscriptions.php	OK
admin/product_modify.php	OK
admin/states.php	OK
admin/test_pgp.php	OK
customer/recommends.php	OK

---*break*---

Status legend:
OK - file ready to patch,
checksum error - patch contents is corrupted,
non-writable - please give those files a write permissions,
not a file - the target is not a file,
not exists - file is missing,
could not patch - patch cannot be applied to this file automatically because it
was significantly modified, the patch for this file should be applied manually,
already patched - file was already patched.

Note:
Files which are not exists and already patched will be ignored.

Patch text:

```
Index: INSTALL
================================
================================
--- INSTALL        5 Feb 2004 12:25:43 -0000
        1.46.2.2
+++ INSTALL       27 Apr 2004 06:05:29 -0000
        1.46.2.3
@@ -1,7 +1,7 @@
 X-Cart Installation Manual
 =========================
```

Warning:
Some of files in your instalation got the status "could not patch".

Tick here if you want to try to apply the patch to these files ☑ .

[<< Go back]   [Apply patch >>]

At this point it should be noted that an upgrade patch includes several hunks. It means that even though one or more files got the status 'could not patch', you still can try to automatically apply at least some of the patch hunks to these files. If you want to try this option, select the 'Tick here if you want to try to apply the patch to these files' check box (That is what we have done in our example).

Again, it is the conclusion of the testing stage. Now you can proceed to actually applying your upgrade patch. Click on **Apply patch** to go to the following step in the upgrade process.

If in the process of testing patch applicability one or more files get '*already patched*' status, there is nothing wrong with it and you can continue with the upgrade.

Picture 9: *Testing patch applicability ('already patched' warning).*

Testing patch applicability and generation list of files could take several minutes, please be patient.

```
INSTALL ... OK
VERSION ... already patched
smarty.php ... OK
top.inc.php ... OK
admin/category_modify.php ... OK
admin/configuration.php ... OK
admin/db_backup.php ... OK
admin/file_edit.php ... OK
admin/html_catalog.php ... OK
admin/pay_subscriptions.php ... OK
admin/product_modify.php ... OK
admin/states.php ... OK
admin/test_pgp.php ... OK
customer/recommends.php ... OK
customer/referer.php ... OK
customer/register.php ... OK
include/func.php ... OK
include/getfile.php ... OK
include/install.php ... OK
include/login.php ... OK
include/payment_method.php ... OK
include/product_modify.php ... OK
include/register.php ... OK
include/sessions.php
```

6. **Applying the upgrade patch** (Step 2 of 2). Now that patch applicability has been checked, we proceed to the next step of upgrading X-Cart. Clicking on the **Apply patch** button initiates the process of applying the upgrade patch.

   This process can involve the following steps:
   1) patch_pre.php code execution
   2) *.diff files application
   3) database modifications (execution of SQL commands from the file patch.sql)
   4) patch_post.php code execution

5) updating of X-Cart version in the database (Do not confuse with the file VERSION in X-Cart root - this file has nothing to do with the information about X-Cart version in the database!)

It must be pointed out that each of these five steps is optional and is not necessarily included into upgrade (for example, steps #1 and #4 are very rare, #3 is also not so often). The presence or absence of this or that step depends only on the decision of upgrade developers. However, if a step is meant to be in the upgrade, but errors occur during this step - upgrade patch application fails.

The process of upgrade patch application is shown on the screen:

Picture 10: *Applying upgrade patch.*

Applying patch. Please be patient...

INSTALL ... OK
VERSION ... could not patch
smarty.php ... OK
top.inc.php ... OK
admin/category_modify.php ... OK
admin/configuration.php ... OK
admin/db_backup.php ... OK
admin/file_edit.php ... OK
admin/html_catalog.php ... OK
admin/pay_subscriptions.php ... OK
admin/product_modify.php ... OK
admin/states.php ... OK
admin/test_pgp.php ... OK
customer/recommends.php ... OK
customer/referer.php ... OK
customer/register.php ... OK
include/func.php ... OK
include/getfile.php ... OK
include/install.php ... OK
include/login.php ... OK
include/payment_method.php ... OK
include/product_modify.php ... OK
include/register.php ... OK
include/sessions.php ... OK

If the application of the upgrade patch to some files fails, you will get a notice about that in the results table: the files that could not be patched correctly get the status '*could not patch*'.

Picture 11: *Applying patch (Step 2 of 2: Applying the patch).*

Applying patch

Step 2 of 2: Applying the patch

Files patch status:

File	Status
INSTALL	OK
VERSION	could not patch
smarty.php	OK
top.inc.php	OK
admin/category_modify.php	OK
admin/configuration.php	OK
admin/db_backup.php	OK
admin/file_edit.php	OK
admin/html_catalog.php	OK
admin/pay_subscriptions.php	OK
admin/product_modify.php	OK
admin/states.php	OK
admin/test_pgp.php	OK
customer/recommends.php	OK
customer/referer.php	OK
customer/register.php	OK

----
break--

skin1/provider/main/import.tpl   OK

skin1/provider/main/shipping_zones.tpl   OK

Status legend:
OK - file ready to patch,
checksum error - patch contents is corrupted,
non-writable - please give those files a write permissions,
not a file - the target is not a file,
not exists - file is missing,
could not patch - patch cannot be applied to this file automatically because it was significantly
modified, the patch for this file should be applied manually,
already patched - file was already patched.

PATCH RESULTS...

File INSTALL successfully patched
PATCH FAILED AT FILE: VERSION, see PATCH LOG for details.
File smarty.php successfully patched
File top.inc.php successfully patched
File admin/category_modify.php successfully patched
File admin/configuration.php successfully patched
File admin/db_backup.php successfully patched
File admin/file_edit.php successfully patched
File admin/html_catalog.php successfully patched
File admin/pay_subscriptions.php successfully patched
File admin/product_modify.php successfully patched
File admin/states.php successfully patched
File admin/test_pgp.php successfully patched
File customer/recommends.php successfully patched
File customer/referer.php successfully patched
File customer/register.php successfully patched
File include/func.php successfully patched
File include/getfile.php successfully patched
File include/install.php successfully patched
File include/login.php successfully patched
File include/payment_method.php successfully patched
File include/product_modify.php successfully patched
File include/register.php successfully patched
File include/sessions.php successfully patched

```
------------------------------------------------------------------
break------------------------------------------------------------------
```

```
done
Hmm... Looks like a unified diff to me...
Patching file /u/mclap/public_html/test/xcart/skin1/provider/main/shipping_zones.tpl using Plan
B...
Hunk #1 succeeded at 1.
Hunk #2 succeeded at 31.
done
```

Warning!
The following files could not be patched with automated upgrade system. This may be because these files were changed from their original state. Those files needs to be patched manually or restored from backup.

File	Status
VERSION	could not patch

Status legend:
OK - file ready to patch,
checksum error - patch contents is corrupted,
non-writable - please give those files a write permissions,
not a file - the target is not a file,
not exists - file is missing,
could not patch - patch cannot be applied to this file automatically because it was significantly modified, the patch for this file should be applied manually,
already patched - file was already patched.

Please correct the errors displayed above and try again.

<< Go back

Patch results show what files the patch was successfully applied to, and what files failed to be patched. You can see patch log for details (Patch log is displayed in this form, but you can also view it in the file xcart_dir/templates_c/upgrade/patch.log)

In our example an error occurred: VERSION could not be patched (**IMPORTANT!** This VERSION is not the file VERSION located in X-Cart root directory, but a record of X-Cart version in the database)

We cannot proceed with this error, so all we can do is click on the **Go back** button. This takes us back to the very beginning of the upgrade procedure when patch applicability is tested (Step 1 of 2). This time we wait for X-Cart to state that VERSION could not be patched and remove the tick from the 'Tick here if you want to try to apply the patch to these files' check box. Next, we click on **Apply patch** and watch the progress of upgrade patch application on the screen. The files patched during the first run of upgrade application are marked '*already patched*' (which is normal) and VERSION again gets the status '*could not patch*' (with the only difference that this time it is ignored).

Picture 12: Applying patch (Step 2 of 2: Applying the patch).

--*break*--

PATCH RESULTS...

The database was successfully patched!
Taxes are successfully updated
Zones are successfully updated
AFTER-PATCH was applied successfuly.
Updating DB version info.

PATCH LOG...

Warning!
The following files could not be patched with automated upgrade system. This may be because these files were changed from their original state. Those files needs to be patched manually or restored from backup.

File	Status
VERSION	could not patch

Status legend:
OK - file ready to patch,
checksum error - patch contents is corrupted,
non-writable - please give those files a write permissions,
not a file - the target is not a file,
not exists - file is missing,
could not patch - patch cannot be applied to this file automatically because it was significantly modified, the patch for this file should be applied manually,
already patched - file was already patched.

Finish >>

> Patch results show that upgrade patch has been successfully applied to all the files except VERSION (it will have to be patched manually).

> Clicking on **Finish** gets you back to the 'Patch/Upgrade center' page.

7. If X-Cart failed to apply upgrade patch to one or more files or to apply SQL patch to the database automatically and you saw error messages in red in the 'Applying patch' results form, it is time to try and patch these files and/or database info manually. YOU SHOULD UNDERSTAND THE CONCEPT OF USING DIFF FILES AND BE FAMILIAR WITH X-CART DATABASE STRUCTURE TO PERFORM THIS OPERATION!

- If a file could not be patched, use PATCH LOG to find out which of the patch hunks failed to apply. Open the file that could not be patched in a text editor. In the 'upgrade' folder find a DIFF for this file (If you look at the structure of an upgrade patch, you will see that DIFF files bear the names of the source files to which they should be applied and have the same location relative to the upgrade patch directory as the source files have to the root). Open the DIFF file in the text editor and compare the contents of the hunk that could not be applied with the corresponding part of the source code. Each hunk begins with a string similar to this one:
  @@ -97,6 +97,7 @@
  where -97 is the line of the block in the corresponding source file that needs to be modified. Following this line are lines marked by "+" and "-". Find in the source file

the line marked by "-" in the DIFF file and replace it by the line from the DIFF file that is marked by "+". Save the file.

> **Note**. If the line to be replaced has custom modifications you should combine them with new version modifications.

- If database info could not be patched,use PATCH LOG to find out what has gone wrong. Open patch.sql file from upgrade patch folder and execute the necessary SQL queries.
  After you have successfully applied the SQL patch, update X-Cart version info in the database by using the following SQL query:

  > UPDATE xcart_config SET value='x.x.x' WHERE name='version'
    where x.x.x. is the upgrade target version number, for example: value='3.5.8'

8. If manual application of the upgrade patch to a file or to SQL database fails, we recommend you restore your X-Car (See 'Restoration procedure' section for details) and order upgrade services from X-Cart team.

   After you have successfully restored your X-Cart, follow the 'Security' section.

Restoration procedure

You may need to restore your cart to the original state if something goes wrong during the upgrade procedure. To restore X-Cart take the following steps:

1. Uncompress the saved X-Cart archive into X-Cart folder. On Unix-based servers with a terminal access, you can do it using the command:
   > gunzip < xcart.tgz | tar -xvf -

2. Restore the database from the database backup. In order to do so log into X-Cart administrative area and select **DB Backup/Restore** from the Administration menu. If as a result of the upgrade procedure the cart stops functioning you can restore the database using MySQL command line utility. If you do not have access to MySQL command line utility, take the following steps to restore X-Cart:

   1) Reinstall the original X-Cart from the distributive.

   2) Restore the database using **DB Backup/Restore** from the Administration menu.

   3) Uncompress the saved X-Cart archive into X-Cart folder.

After upgrade

After you have successfully upgraded your X-Cart, please check the functionality of the updated script files, templates and database by running X-Cart in both administrative and customer mode. If you experience any problems with the upgraded X-Cart you need to restore the previous version of X-Cart and X-Cart database. See the 'Restoration procedure' section for details.

Please read the 'Security' section for important security notes.

Security

For security reasons it is highly recommended to restore the original permissions for patched

files.

After the upgrade procedure has been successfully completed or after X-Cart has been restored, remove all the temporary files from the '<xcart root folder>/templates_c' directory.

Related topics:

Applying File Patches

Applying SQL Patches

6.4.12.2 Applying File Patches

The 'Patch/Upgrade center' section of X-Cart allows you to apply file patches supplied by X-Cart developers using the administrator interface of your store. A patch can be applied from a patch file or from an URL.

IMPORTANT! It is recommended to make a backup copy of all PHP scripts, templates and create a database dump before applying any patches. Please use Patch/Upgrade function ONLY if you absolutely understand what you are doing.

For example, you need to apply the following patch:

```
Index: admin/category_modify.php
@@ -160,7 +160,7 @@
db_query("update $sql_tbl[categories] set category='$category_name',
description='$description',
meta_tags='$meta_tags', avail='$avail', order_by='$order_by',
membership='$cat_membership'
where
categoryid='$cat'");
db_query("UPDATE $sql_tbl[categories] SET membership='$cat_membership'
WHERE category LIKE
'$category_name/%'");
-       db_query("UPDATE $sql_tbl[categories] SET
category=CONCAT_WS('','$category_name',SUBSTRING(category,".strlen
($old_category_name).")) WHERE category LIKE
'Books/%'");
+       db_query("UPDATE $sql_tbl[categories] SET
category=CONCAT_WS('','$category_name',SUBSTRING(category,".(strlen
($old_category_name)+1).")) WHERE category
```

```
LIKE '$old_category_name/%'");
}
#
```

This can be done in several ways: via X-Cart administration interface, by issuing the command 'patch' or manually.

To apply a patch via X-Cart admin interface:
1. BACK UP YOUR STORE!
2. Set write permissions for the files that will be patched.
3. Save the text of your patch to a file (e.g. patch.diff). If you are planning to use a patch from a certain URL, skip this step.
4. Log into the administration area of your X-Cart and go to the 'Patch/Upgrade' section.

If there are any problems that make the application of patches impossible, the Patch/ Upgrade center page looks something like this:

Picture 1: *Error message.*

There is an error message saying what is wrong. You need to correct the error before you can proceed.

If everything is OK, you see the Apply patch form.

Picture 2: *Apply patch form.*

5. In the Apply patch form select your file by clicking on the **Browse** button. Alternatively, you can enter the patch URL into the appropriate field.

> If you are going to apply a new patch, 'Reverse' selectbox should be set to '*No'*. Selecting '*Yes*' will lead to the removal of the formerly applied patch.

> To start the application of the patch click on **Apply**.

> The procedure of patch application includes two basic steps:

> 1) testing patch applicability;

> 2) applying the patch.

6. **Testing patch applicability** (Step 1 of 2). First X-Cart will check the presence of executable permissions for the patch tool, then patch checksums and permissions for each file the patch must be applied to. In progress this check will look something like this:

Picture 3: *Testing patch applicability.*

Then the results of patch applicability testing will be shown to you in the 'Applying patch' form.

Picture 4: *Applying patch (Step 1 of 2: Testing patch applicability and generation of a list of files).*

---*break*---

OK - file ready to patch,
checksum error - patch contents is corrupted,
non-writable - please give those files a write permissions,
not a file - the target is not a file,
not exists - file is missing,
could not patch - patch cannot be applied to this file automatically
because it was significantly modified, the patch for this file should be
applied manually,
already patched - file was already patched.

Note:
Files which are not exists and already patched will be ignored.

Patch text:

```
Index:
admin/db_backup.php====================
======================================
========--- admin/db_backup.php        26 Apr
2004 06:19:23 -0000 1.25.2.5+++
admin/db_backup.php 28 May 2004 13:17:21 -0000
        1.25.2.6@@ -31,7 +31,7 @@
\*****************************************
*******************************/  #-#
$Id: db_backup.php,v 1.25.2.5 2004/04/26
```

`<< Go back`   `Apply patch >>`

If your Patch/Upgrade center detects any problems (errors - marked in red), you will not be able to proceed with applying your patch until these problems are resolved. You will have to go back, make the necessary corrections and run the patch applicability test once again.

In our example we did not encounter any errors. It means the patch is very likely to be applied without any problems. So we proceed to the next step.

7. **Applying the patch** (Step 2 of 2). Clicking on the **Apply patch** button initiates the process of applying the patch. In this process *.diff files are applied to the source code of your X-Cart.

The process of upgrade patch application is shown on the screen:

Picture 5: Applying the patch.

Applying patch. Please be patient...

admin/db_backup.php ... OK
admin/languages.php ... OK
admin/memberships.php ... OK
admin/set_label.php ... OK
admin/test_pgp.php ... OK
customer/referer.php ... OK
include/func.php ... OK
include/orders.php ... OK
modules/Bestsellers/bestsellers.php ... OK
modules/Greet_Visitor/set_cookie.php ... OK
modules/Subscriptions/subscription_modify.php ... OK
modules/Subscriptions/subscriptions.php ... OK
modules/Wishlist/wishlist.php ... OK
payment/cc_2checkoutcom.php ... OK
payment/cc_3delta.php ... OK
payment/cc_authorizenet_sim.php ... OK
payment/cc_cardia.php ... OK
payment/cc_centi.php ... OK
payment/cc_chargeit.php ... OK
payment/cc_delta.php ... OK
payment/cc_edinar.php ... OK
payment/cc_egateway.php ... OK

Patch results show what files the patch was successfully applied to, and what files failed to be patched. You can see patch log for details.

Picture 6: *Applying patch (Step 2 of 2: Applying the patch).*

Applying patch

Step 2 of 2: Applying the patch

Files patch status:

File	Status
admin/db_backup.php	OK
admin/languages.php	OK
admin/memberships.php	OK
admin/set_label.php	OK
admin/test_pgp.php	OK
customer/referer.php	OK
include/func.php	OK
include/orders.php	OK
modules/Bestsellers/bestsellers.php	OK
modules/Greet_Visitor/set_cookie.php	OK
modules/Subscriptions/subscription_modify.php	OK
modules/Subscriptions/subscriptions.php	OK
modules/Wishlist/wishlist.php	OK
payment/cc_2checkoutcom.php	OK
payment/cc_3delta.php	OK
payment/cc_authorizenet_sim.php	OK

---*break*---

Status legend:
OK - file ready to patch,
checksum error - patch contents is corrupted,
non-writable - please give those files a write permissions,
not a file - the target is not a file,
not exists - file is missing,
could not patch - patch cannot be applied to this file automatically
because it was significantly modified, the patch for this file should be
applied manually,
already patched - file was already patched.

PATCH RESULTS...

File admin/db_backup.php successfully patched
File admin/languages.php successfully patched
File admin/memberships.php successfully patched
File admin/set_label.php successfully patched
File admin/test_pgp.php successfully patched
File customer/referer.php successfully patched
File include/func.php successfully patched
File include/orders.php successfully patched
File modules/Bestsellers/bestsellers.php successfully patched
File modules/Greet_Visitor/set_cookie.php successfully patched
File modules/Subscriptions/subscription_modify.php successfully patched
File modules/Subscriptions/subscriptions.php successfully patched
File modules/Wishlist/wishlist.php successfully patched
File payment/cc_2checkoutcom.php successfully patched
File payment/cc_3delta.php successfully patched
File payment/cc_authorizenet_sim.php successfully patched
File payment/cc_cardia.php successfully patched
File payment/cc_centi.php successfully patched
File payment/cc_chargeit.php successfully patched
File payment/cc_delta.php successfully patched
File payment/cc_edinar.php successfully patched
File payment/cc_egateway.php successfully patched
File payment/cc_egold.php successfully patched
File payment/cc_epdq.php successfully patched
File payment/cc_esec.php successfully patched
File payment/cc_ewayweb.php successfully patched

---*break*---

```
File shipping/mod_FEDEX.php successfully patched
File skin1/check_email_script.tpl successfully patched
File skin1/admin/main/edit_memberships.tpl successfully patched


PATCH LOG...


Hmm... Looks like a unified diff to me...
Patching file /u/mclap/public_html/test/xcart/admin/db_backup.php using Plan B...
Hunk #1 succeeded at 31.
Hunk #2 succeeded at 80.
done
Hmm... Looks like a unified diff to me...
Patching file /u/mclap/public_html/test/xcart/admin/languages.php using Plan B...
Hunk #1 succeeded at 31.
done
Hmm... Looks like a unified diff to me...
Patching file /u/mclap/public_html/test/xcart/admin/memberships.php using Plan
B...
Hunk #1 succeeded at 31.
Hunk #2 succeeded at 49.
done
Hmm... Looks like a unified diff to me...
Patching file /u/mclap/public_html/test/xcart/admin/set_label.php using Plan B...
Hunk #1 succeeded at 31.
done
Hmm... Looks like a unified diff to me...
Patching file /u/mclap/public_html/test/xcart/admin/test_pgp.php using Plan B...
Hunk #1 succeeded at 31.
Hunk #2 succeeded at 49.
done
Hmm... Looks like a unified diff to me...
Patching file /u/mclap/public_html/test/xcart/customer/referer.php using Plan B...
Hunk #1 succeeded at 31.
Hunk #2 succeeded at 51.
done
Hmm... Looks like a unified diff to me...
Patching file /u/mclap/public_html/test/xcart/include/func.php using Plan B...
Hunk #1 succeeded at 31.
Hunk #2 succeeded at 196.
Hunk #3 succeeded at 238.
```

---*break*---

```
Patching file /u/mclap/public_html/test/xcart/provider/import_images.php using
Plan B...
Hunk #1 succeeded at 31.
Hunk #2 succeeded at 190.
done
Hmm... Looks like a unified diff to me...
Patching file /u/mclap/public_html/test/xcart/shipping/mod_CPC.php using Plan
B...
Hunk #1 succeeded at 31.
Hunk #2 succeeded at 100.
done
Hmm... Looks like a unified diff to me...
Patching file /u/mclap/public_html/test/xcart/shipping/mod_FEDEX.php using Plan
B...
Hunk #1 succeeded at 31.
Hunk #2 succeeded at 215.
done
Hmm... Looks like a unified diff to me...
Patching file /u/mclap/public_html/test/xcart/skin1/check_email_script.tpl using
Plan B...
Hunk #1 succeeded at 1.
done
Hmm... Looks like a unified diff to me...
Patching
file /u/mclap/public_html/test/xcart/skin1/admin/main/edit_memberships.tpl using
Plan B...
Hunk #1 succeeded at 5.
done

Patch was applied successfuly.
```

Finish >>

If the application of the patch has been successful, you can click on **Finish** to get back to the 'Patch/Upgrade center' page.

Note. Do not forget to change permissions for the patched files.

To apply a patch by issuing the command 'patch':

1. Save the text of your patch to a file (e.g. patch.diff).
2. Copy this file (patch.diff) to the directory where X-Cart is installed.
3. Issue the command 'patch -C < patch.diff' to check the patch applicability.
4. If there are no errors during the check-up, apply the patch by issuing the command 'patch < patch.diff'.

You can read more about 'patch' command in the manual (man patch, info patch).

To apply a patch manually:

If a patch application failed in the first two ways (this may be caused by redundant spaces or conversion problems) you can try to apply the patch manually.

1. Open the file after 'Index:' (admin/category_modify.php) in the text editor;
2. Find the line marked by "-" in the text of patch and remove it.
3. Insert the line marked by "+".

If you cannot apply the patch in these ways it means you have modified the file that needs to be

patched or this file is from another version of X-Cart and cannot be patched by this patch. Ask technical support to help you.

Related topics:

[Applying SQL Patches](#)

[Upgrading X-Cart Software](#)

6.4.12.3 Applying SQL Patches

The 'Patch/Upgrade center' section of X-Cart allows you to apply SQL patches to your database using the administrator interface of your store.

IMPORTANT! It is recommended to make a backup copy of all PHP scripts, templates and create a database dump before applying any patches. Please use Patch/Upgrade function ONLY if you absolutely understand what you are doing.

To apply an SQL patch:
1. **BACK UP YOUR STORE!**
2. Save the text of your patch to a file. If you are planning to use a patch from a certain URL, skip this step.
3. Log into the admin area of your X-Cart and go to the 'Patch/Upgrade' section. Scroll down to the 'Apply SQL patch' form.

   Picture 1: Apply SQL patch form.

4. In the 'Apply SQL patch' form select your file by clicking on the **Browse** button. Alternatively, you can enter the patch URL or enter SQL query(ies).

   To start the application of the patch click on **Apply**.

5. The text of the patch will be shown to you in the 'Patch text' field.

   Picture 2: Applying the patch.

Click on **Apply patch** to continue.

6. The results of patching your database will be shown to you. If no errors occurred, you can click on **Finish**.

Picture 3: Patch results.

Related topics:

Applying File Patches

Upgrading X-Cart Software

6.4.13   Generating HTML catalog

'HTML catalog' section (can be accessed by clicking on **HTML catalog** in the Administration menu) can be used to generate an HTML version of X-Cart customer interface. HTML catalog can make your site search engine friendly. Modern search engines give script generated pages lower priority in comparison with plain HTML pages. Creating an HTML catalog can help you avoid this disadvantage. A customer will browse your HTML catalog, but when he decides to add

a product to the shopping cart, do search, etc - he will be automatically redirected to the script version of the cart.

Note. Mind that if a customer leaves HTML catalog for dynamic php pages (for example, checks out some products and then decides to continue shopping), he is not returned to the HTML catalog pages again.

Note. Your HTML catalog is a set of static pages, it does not reflect the changes in your database, so when you add new products, change pricing, etc - do not forget to refresh your catalog (generate it again).

Your HTML catalog will be located in 'catalog' directory under X-Cart directory.

For UNIX users, make sure that 'catalog' directory has world writable permissions (go to X-Cart directory and issue the command: chmod 0777 catalog), after the catalog generation is completed do not forget to set permissions back to 0755.

Picture 1: *HTML catalog form.*

The top part of the 'HTML catalog' form shows the path to the directory in which the catalog will

be created and the URL that should be used for access to the catalog.

If you already have an HTML catalog in the specified directory and want to replace it with a completely new one, you should remove all *.html files from the catalog directory before generating a new catalog. This can be done by selecting the **Drop the old catalog before generating a new one** check box (Selecting this check box does not affect the shop_closed. html file). Reversely, if you want just to update the old catalog without removing all the data, this check box should be left unselected. The fields that follow allow you to specify which part of the catalog should be updated.

Use the **Category** selectbox to specify what categories should be included into the catalog.

If the subcategories of the selected category/categories should be included, select the **Run through subcategories** check box.

Specify if HTML pages should be generated for both categories and products, for categories only or for products only.

Select the number of pages you would like to be generated per one pass (Use this if you get timeouts when generating the catalog in one pass).

Select catalog filenames style.

Convert embedded static pages: select this option to include the embedded static pages into HTML catalog.

You can generate catalogs for different languages indicating the catalog path in the text box next to the desired language.

Click on **Generate catalog**.

Related topics:

SEO Options

6.4.14   Managing Static Pages

Clicking on **Static pages** in the Administration menu allows the administrator of the store to create his own HTML pages in X-Cart directory.

There are two types of static pages:

- Embedded;

- Root.

The Embedded pages are built in X-Cart design and they are displayed in the information column (the central column in the three-column templates scheme).

The Embedded pages links are added to the menu box 'Help', but the order of the links can be changed. These pages can be hidden temporarily by selecting the status 'Disabled'. The Embedded pages code must not contain such tags as:<HTML>, <HEAD>, <BODY>.

The Root pages are located at the end of X-Cart directory (for example, index.html). The Root pages do not depend on the rest of X-Cart pages and they must be full HTML-files (with tags such as:<HTML>...</HTML>).

Picture 1: *Static pages.*

Two root level pages - index.html and shop_closed.html are defined by default.

To add a new embedded or root level page, click on **Add new** in the corresponding section of the 'Static pages' form.

To find out all HTML and HTM files use the button **Find pages**.

To preview a page, click the **Preview** link opposite it.

To delete a page, select the check box next to it and click on **Delete selected**. You can use the **Check all** / **Uncheck all** links to select or unselect all the boxes.

If you need to update the position of an embedded page, enter the new position numbers into the appropriate fields and click on **Update**.

To edit a page, click on the corresponding page title. The 'Static page details' form will appear where you will be able to change all the necessary info.

Note. Since X-Cart version 4.0.2. static pages can contain <SCRIPT> tags.

Picture 2: *Static page details.*

You can modify the name of the page and its content as well as its status and position in the list of pages displayed on the menu (only for embedded level pages). Click on **Pages list** to return to the list of pages.

Related topics:

Managing the Speed Bar

6.4.15   Managing the Speed Bar

Speed bar is a configurable set of shortcuts that can simplify navigation within your store. It appears at the top of your customer front-end as a set of tabs with links to the most important pages of your store.

Picture 1: *Speed bar (Customer zone).*

Clicking on **Speed bar** in the Administration menu enables you to access the 'Speed Bar Management' section where you can define the links that should be used for the tabs.

Picture 2: Speed Bar Management.

To add a new link to the Speed bar, enter its position number, title and URL into the appropriate fields in the 'Add Link' subsection of the 'Speed Bar Management' form. Select the check box in the **ACTIVE** column if you want the new tab to appear in the customer zone immediately. Click on **Add/Update**.

If any information must be changed for the links that already exist, change this info and click on **Add/Update**.

To delete a link, click on **Delete** next to it.

Related topics:

Managing Static Pages

Part

7

7   Glossary

Administrator account

In **X-Cart PRO** administrator account is used to watch over the whole store, control and configure it, manage user accounts (including provider and admin accounts). Administrator account user can add products on behalf of any provider, as well as delete/modify products (for anti-abuse purposes). Mainly, you use this account for working with orders, manual credit card processing, etc. The exception is the administrator account called "fulfillment staff" account (a "fulfillment staff" administrator has access only to orders and statistics).

In **X-Cart GOLD** provider acts both as admin (has full control over the store) and provider (can sell products). This account is used to configure the store, as well as to add, delete and modify products and other properties related to products.

CSV format

CSV is an abbreviation for Comma Separated Values, but it can use comma, tab or semicolon as a delimiter to separate values in a plain text file. Columns of data are separated by a delimiter (comma, tab or semicolon), and each row of data ends in a carriage return.

CSV file format is supported by most of grid calculators like Microsoft Excel, Lotus 1-2-3, Quattro pro etc.

Customer review

Your customers can write reviews about products if the customer reviews module is enabled. You can edit your customers' reviews for anti-abuse purposes.

CVV2

CVV2 is an important feature ensuring security when you are using your credit card for transactions on the Internet and over the phone. "CVV" is an abbreviation for "Card Verification Value". For Discover Card the same thing is called the "Cardmember ID".

Most credit cards, such as *Visa*, *Mastercard*, and *Discover*, have a three-digit CVV2 number printed in the signature space on the back. It is always the last group of numbers in the signature space on the back of the card. Please keep in mind that it is NOT part of your regular credit card number.

The CVV2 is a means of fraud protection that helps validate two things: that the customer has the credit card in their possession and that the credit card number is legitimate.

By preventing fraud CVV2 helps keep costs down for everyone.

ESD distribution

You can sell electronically distributed goods like movies, software, music, e-books etc (**EGoods** module must be enabled). To sell a product by way of Electronic Software Distribution you should upload the file onto the server and associate a product with the file. When your customer buys an electronically distributed product he will be sent an email with the download link and download key.

Global discounts

Global (purchase) discounts apply to all customer orders that include products in the details of which you selected the **Apply global discounts** check box. These discounts do not require your customers to enter any type of "code" to get a discount. Purchase discounts are normally used to provide automatic savings on every customer order that is over a certain amount. For more details see: Defining Discount Rates.

List price

List prices feature was designed for marketing purposes only and does not affect the actual price of your products. List prices can be used to advertise your store by showing how favorably the prices in your store differ from the average market prices. If you know your price for some product is lower than in the other stores, let your customers know that, too. All you need to do is enter the average market price for this product into the List price field. X-Cart will calculate the difference between the actual price and List price in percent. The List price will appear on the storefront enabling your customers to compare the different prices and decide in favor of your store.

Note. Please do not mix up this feature with real X-Cart discounts (like discount coupons, wholesale pricing) which actually affect the price.

Product browsing view

When your customer browses through the categories in your shop, the products assigned to the categories he looks into will be displayed on the page in the form of a list. For each of the products in the list there will be a title, a short description, a price and, if selected, an advertising discount and a thumbnail picture.

Product detailed view

When your customer clicks on the product title or on the 'See details' link in the product browsing view, product detailed view appears. In the product detailed view the customer can see the product title, short and detailed descriptions, product options, detailed images, customer ratings and reviews. Here your customer can select product options and quantity, and add the product to the shopping cart.

Provider account

In X-Cart PRO provider accounts are used to add, delete and modify products and other properties related to products. Every provider has his own set of products and cannot control the products of the other providers. This feature allows to create a mall where each product provider is able to sell his own products. Everything a provider does affects his own products only. If a provider wants to browse orders history, he sees just his own orders; if he wants to issue a discount coupon, this coupon will be valid only for his own products. The only exception is the provider account called "root" account (a provider with such an account can view/delete/modify products of all the other providers).

In X-Cart GOLD provider has the rights of administrator.

Shipping freight

Shipping freight is a flat charge for transporting your goods. If you have any special expenses associated with product packaging or shipping you can define the shipping freight to cover these expenses. Shipping freight can be defined when you add a new product. The shipping freight value will be added to the cost of shipping according to the selected method and it will increase the total shipping cost.

SKU

SKU stands for Stock Keeping Unit and is a number associated with a product for inventory purposes. X-Cart uses this number to identify an individual product. That is why each product must have an SKU, and each SKU should be unique.

If your products do not have an SKU, ISBN, or part number, you can invent your own arbitrary numbering system. The important thing is you give X-Cart unique numbers that it can use to reference each product.

Part

8

8   FAQ

8.1   FAQ on Installation

Q: *I see my X-Cart distribution package, but what program do I need to start it?*
Whenever I try to open it, it asks me with what program.

A: X-Cart distribution .tgz file is an archive file that can be unpacked with the help of the
following software:

- Unix host: tar -xzf xcart-<version>.tgz

- Windows host: with the help of WinZip of WinRar

- MacOS: any unzip software

After unpacking X-Cart distribution you need to upload all its files onto you web-server and run
the Installation Wizard install.php in your browser. This means you need to type an URL like

http://<your_web_server>/<xcart _directory>/install.php in the address bar of your browser and
follow the Installation Wizard instructions.

Please refer to X-Cart Reference Manual for more information on X-Cart installation.

Q: *How can I unpack X-Cart distribution archive in Widows?*

A: If you are using Microsoft Windows, you can use WinZip (or WinRAR) tool to extract files
from X-Cart distribution archive.

1. If you haven't got WinZIP archiver, download it from http://www.winzip.com

2. Launch WinZIP and open X-Cart distribution package

3. Click on the Extract button and specify your web server root directory.

Q: *Why should 'safe_mode' be disabled when I install X-Cart? Can I run X-Cart*
with
'safe_mode' enabled?

A: 'safe_mode' denies using several important PHP commands, including input/output
functions, program execution and file upload support. This makes it virtually impossible to run
complex e-commerce software like X-Cart. Please disable the 'safe_mode' switch or ask your
ISP to do it. If there is no opportunity to disable 'safe_mode' on your current hosting, we
recommend you to change your hosting service provider.

The following features can have problems with safe mode:

1. X-Cart is template-based. Every PHP file reads templates from files. Safe mode does not allow to read files (this is what we mean by "input/output functions"). You can fix this by configuring PHP to allow access to a particular directory.

2. X -Cart uses external executables to process credit cards. If you need online credit card processing , you will have to configure "safe mode exec dir" to the X-Cart executables directory.

3. PHP with safe mode turned on does not accept Post requests with enctype=multipart/form-data. This breaks all our forms and does not allow them to have upload controls.

4. Import/export features won't be working since the safe mode disables scripts to run more than the specified time limit (set in php.ini, typically 30 sec). As well as the HTML catalog feature won't be working as it requires scripts to run for a long time (up to half an hour).

More technical information:

http://www.php.net./manual/en/features.safe-mode.php

Q: I am installing X-Cart on UNIX server. X-Cart Installation wizard asks me to configure file access permissions for UNIX:

> chmod 777 .

> chmod 666 config.php

> chmod 755 admin/spam.sh

> chmod 755 payment/*.pl

What is chmod and why I should set file permissions?

A: If you use UNIX type operation system, you need to change permissions on some files, when you install X-Cart. During the setup X-Cart installation wizard needs to modify the file config.php, create a few directories in xcart directory and write files to them. That is why it is necessary to make the file config.php and xcart directory writable.

To set write permissions for config.php use the command '*chmod 0666 config.php*'.

The command '*chmod 0777 .*' can be used to set write permissions for xcart directory (the dot means 'current directory', so this command must be issued inside the directory to which X-Cart is being installed).

X-Cart uses perl scripts to connect to some payment processors and the shell script spam.sh to send newsletter, so the last two commands ('*chmod 755 admin/spam.sh*' and '*chmod 755 payment/*.pl*') are used to make these scripts executable.

You can use UNIX shell or ftp client to issue chmod commands.

If you are not familiar with chmod command here is some additional info about it:

Chmod command is used to define what users of various groups can do with the file. There are three basic things you can do with any file: read from it, write to it, and execute it.

The basic format for chmod is chmod xyz file.foo. x, y, and z are each a number between 0 and 7. Each number represents the permissions for a group - x is for the user that owns the file, y is

for the group that owns the file (normally the user's group), and z is for everybody else. To determine the actual values for each number, you use the following method: start with x = 0. If you want to be able to read from the file, add four. x can be 0 or 4 at this point in time. If you want to be able to write to the file, add two. x can now be 0, 2 (a write-only file??), 4 (read-only file), or 6 (read/write file). If you want to be able to execute the program, add one. You now have a full range of possible numbers:

Number | Permissions

------------+---

0 | None - cannot read or write or execute

1 | Can execute, but cannot read or write

2 | Write-only, cannot read or execute (??)

3 | Writable/executable

4 | Read-only, cannot write to or execute

5 | Read-only executable, cannot write to

6 | Readable Writable file, but not executable (ie: text file)

7 | Readable Writable Executable file - most programs are this

Please note that it is unsecure to leave config.php file writable for everyone so after installing X-Cart you should issue the following commands:

chmod 644 config.php

chmod 755 .

Q: X-Cart Installation wizard asks me to configure file access permissions for UNIX. I am using Windows Server. What am I supposed to do?

A: If you are performing install or updates under Windows, the IUSR_<computername> user must be given appropriate permissions on the file system to be able to modify files in the xcart directory and its subdirectories or to run perl and upgrades etc.

Appropriate permissions can be set in one of the two ways:

1. Turn off simple file sharing (in the Explorer menus under "Folder Options" -> Tab: View) and then set the permissions using the normal Security tab in Windows.

2. Use the built in 'cacls' command to allow the anonymous user the necessary access. This way "simple file sharing" can remain active but still the user can be granted the necessary privileges. The commandline allows you to change permissions for xcart directory and all its subdirectories::

cacls c:\inetpub\wwwroot\xcart /E /G <computer>\\IUSR_<computer>:C

Here the <computer> string must be replaced with the name of your computer.

It is the C at the end after the colon that means set 'Change' permission.

Q: What do I use the Auth code for?

A: When you install your X-Cart for the first time, at the final stage of installation you are provided with an Auth code. This code will be used for your authentication if you decide to re-install your X-Cart (If in the process of X-Cart installation the installation script detects a previously installed X-Cart, it requires you to enter your Auth code). Auth code will also be required for the installation of X-Cart add-ons. Anyway, your Auth code prevents unauthorized run of the installation script install.php by somebody who is not supposed to be able to re-install your store. If necessary, you can change your auth code by changing the value of $installation_auth_code variable in the file <xcart_dir>/include/install.php

Note. You can look up your Auth code at any time on the Summary page of the admin zone.

Q: I am not sure I can install X-Cart on my own. Is there a way you could do it for me?

A: If you find it difficult to install X-Cart by yourself you can purchase Installation services from us. Our qualified specialists are prepared to help you install X-Cart on your web-server.

Q: We are planning to move the store to another host. What are the recommended actions for doing that?

A: In order to move your X-Cart based store from one host to another, you should take the following actions:

1. If your images are stored on the file system, move them to the database. This can be done under the "Images location" section of the admin interface.

2. Backup the whole X-Cart directory. It is recommended to delete the content of the 'templates_c' directory before creating the backup file.

3. Backup the database. You can do it using either the "DB backup/restore" feature (see the corresponding section of the admin interface) or a MySQL terminal utility (like 'mysqldump' or 'phpMyAdmin').

4. Upload the whole X-Cart directory into the web-directory on the new server.

5. Edit the 'config.php' file and adjust the settings which relate to your MySQL database account on the new host:

```
#
# SQL database details
#
$sql_host ='%SQL_HOST%';
$sql_user ='%SQL_USER%';
$sql_db ='%SQL_DB%';
$sql_password ='%SQL_PASSWORD%';
```

6. Edit the 'config.php' file and adjust the settings referred to the host and web directory where X-Cart is to be installed:

$xcart_http_host ="$HTTP_HOST";

$xcart_https_host ="$HTTP_HOST";

$xcart_web_dir ="/xcart";

You will find some additional explanations in the 'config.php' file above the mentioned lines. If the URL to your store is not being changed, you should not edit these lines.

7. Change the current directory to the root X-Cart folder and adjust file permissions in the following way:

chmod -R 777 templates_c files log catalog skin1

chmod 755 admin/spam.sh payment/*.pl

(If you are using Windows, just make sure that web server has write permissions on 'templates_c', 'files', 'log' and 'skin1' directories)

8. Upload the database backup file into the MySQL-database on the new host using a mysql terminal. If you have an SSH access to your host, you can upload the database using the command line interface:

mysql -u<user> -p<pass> -h<host> <database> < <backup file>

where <user> is the mysql database user name, <host> - the mysql host name (typically 'localhost'), <pass> - the password to your mysql database, and <database> is the database name itself. <backup file> is the name of your database backup file.

If you don't have any terminal access (SSH, telnet or others), check the control panel at your hosting - it may contain PHP mysql admin or other mysql tools.

9. Test the newly installed X-Cart.

10. Move images from the database to the filesystem if necessary.

If you find it difficult to move X-Cart you can order the installation services (on the 'Purchase services' page of the support helpdesk) and we will transfer your X-Cart installation.

Please inform us when the transfer from the old host to the new one is completed. This information is necessary for the license tracking.

Q: I want to use www.mydomain.com/ instead of www.mydomain.com/xcart. How do I move my store?

A: If you want to move your site to root directory, you should move all the files from the directory where X-Cart is installed to root directory. After that you should find <xcart_root>/config.php and replace the following string:

$xcart_web_dir ="/xcart";

by this:

$xcart_web_dir ="";

Do not forget to make backup copies of the original files from root directory which have names similar with the names of files from /shop directory (for example, index.html), because they will be replaced when you move your store.

Note that if you store product and category images on the file system, you should correct links to images manually after moving your store.

If you want to change the location of php-scripts used in customer, admin and provider zones, you should open the file top.inc.php and edit the values of DIR_CUSTOMER, DIR_ADMIN and DIR_PROVIDER constants.

If you have any problems with moving your store, please provide us with ftp/ssh access to your host, and we will help you to move your store. There is a special form in your personal message board ("Access information" section) where you can securely post your access info.

8.2   FAQ on Configuration

Q: I did not specify HTTPS URL during installation, what can I do now to make the checkout process secure?

A: First, you should figure out the name of your secure server (HTTPS), and make sure that it points to the same location as your insecure server (HTTP). Try opening X-Cart admin area home page through both HTTP and HTTPS. If you are able to do it, your HTTPS server name is correct.

Then you should edit file following the section of <xcart_dir>/config.php

#
X-Cart HTTP & HTTPS host
and web directory where X-Cart installed
#
NOTE:
You should put here hostname ONLY without http:// or https:// prefixes
Do not put slashes after the hostname
Web dir is the directory in the URL, not the filesystem path
Web dir must start with slash and have no slash at the end
The only exception is when you configure for the root of the site,
in which case you write single slash in it
#
EXAMPLE 1:

$xcart_http_host ="www.yourhost.com";

$xcart_https_host ="www.securedirectories.com/yourhost.com";

$xcart_web_dir ="/xcart";

will result in the following URLs:

http://www.yourhost.com/xcart

https://www.securedirectories.com/yourhost.com/xcart

#

EXAMPLE 2:

$xcart_http_host ="www.yourhost.com";

$xcart_https_host ="www.yourhost.com";

$xcart_web_dir ="";

will result in the following URLs:

http://www.yourhost.com/

https://www.yourhost.com/

#

$xcart_http_host ="$HTTP_HOST";

$xcart_https_host ="$HTTP_HOST";

$xcart_web_dir ="/xcart";

Then you should go to payment methods menu and set HTTPS protocol for the payment methods that need to be secured.

Then you can set up secure checkout in admin area on Payment methods page by selecting HTTPS as protocol for payment method.

Q: My HTTP and HTTPS servers point to different locations, should I install two copies of X-Cart, one for HTTP and another for HTTPS ?

A: This can be done, but keep in mind that you will have to setup both of them separately or, after setting up one X-Cart, copy it to another location. However, this method has a lot of annoying side effects. For example, you will have to maintain two copies of templates. If you edit HTTP templates, you will also need to edit HTTPS templates in the same manner, i.e. you will have to keep both the copies synchronized. Much better if your HTTP or HTTPS server allows for symbolic links: you will be able to keep only one copy of X-Cart directory, while on the other one there will be just a symbolic link to it.

Q: My PHP is compiled as CGI and requires #!/usr/bin/php string at the beginning of each PHP script, shall I edit all the scripts and insert this string ?

A: If your PHP is compiled as CGI we recommend you set /usr/local/bin/php as the default

handler for .php files (setting #!/usr/local/bin/php as the first line of the script is not a good idea). You can add the following directives to your Apache configuration file httpd.conf or .htaccess file in your X-Cart directory:

Action php-script /usr/local/bin/php
AddHandler php-script .php

Please refer to PHP and Apache manuals for details.

Q: I do not receive notifications from PayPal, how can I make PayPal tell X-Cart that an order was processed successfully ?

A: Before you receive payment notifications from PayPal, you need to setup a callback script which will be called by PayPal when an order is processed.

1. Login to your PayPal account.

2. Click on the Profile subtab.

3. Click on the Instant Payment Notification Preferences link in the 'Selling Preferences' column.

4. Select the checkbox and make sure the notification URL is blank.

5. Click Save.

You have successfully activated IPN.

Then you should check if there is CURL, libCURL, Net::SSLeay Perl module or any other HTTPS bouncer installed on your host.

Q: I'm using Worldpay CC processor, but after a successful payment no orders are placed in X-Cart database, what is wrong ?

A: After a successful payment Wordpay is supposed to notify X-Cart that the order was processed, after that the order is placed in X-Cart database along with all the product options (color, size, etc). In order to get the notifications you should specify callback URL to which Worldpay will post order confirmations.

To do this go to the configuration options dialog in your merchant account, put the following URL into the callback URL input box: http://www.yoursite.com/xcartdir/payment/cc_worldpay.php

Merchant's shop URL http://www.yoursite.com/xcartdir/customer/home.php

Callback URL http://www.yoursite.com/xcartdir/payment/cc_worldpay.php

Callback enabled? On

FuturePay callback Enabled? (Requires standard Callback enabled) Off

Use callback response? On

Q: How can I obtain a USPS account?

A: Visit the site http://www.uspswebtools.com/ and register for USPS Web Tools (click on the 'Sign up for USPS Web Toos' link and complete the registration form). You will receive an e-mail with Username and Password. Follow the instructions provided there. Get in touch with Internet Customer Care Center and ask them to switch on your profile to allow you to access the Production Server and to provide you with the production URL (Only the URL without ShippingAPI.dll file, i.e. "production.shippingapis.com").

Enter this URL, username and password into the appropriate fields in the USPS account details subsection of the 'Shipping options' page (accessible via 'General settings' in the admin area).

Q: I want X-Cart interface in a language other than English. What should I do to translate it?

A: X-Cart uses language variables to display text in its interface. The values assigned to these variables may be actually in any language. If you want the text of your X-Cart based shop to be displayed in another language, you will need to edit the values of the language variables X-Cart uses. This can be done via the Administration menu->Languages in the admin interface. An easy way to add a new language in X-Cart is to export the necessary language to a CSV file, open this file for editing in Notepad or Excel, translate the English variable values to the language you want, save the file and re-import it into X-Cart.

Q: I use X-cart with IIS and get the following error:

PHP Warning: Server Error in C:\IISRoot\mysite\xcart\config.php on line XXX

A: The problem is that your PHP mail settings are incorrectly configured. You should edit the following section of PHP configuration file php.ini:

[mail function]
; For Win32 only.
SMTP = localhost << Enter here DNS name or IP address of the SMTP server PHP under Windows should use for mail sent with the mail() function

; For Win32 only.
sendmail_from = me@localhost.com << Which "From:" mail address should be used in mail sent from PHP under Windows

Q: I'm using Internet Information Server (IIS) and I get the error like:

Warning: Failed to Connect in C:\Inetpub\Sites\Sitename\xcart\config.php on line XXX
while registering a new user, recovering a forgotten password, entering a wrong admin password, placing an order etc.

A: There is a located procedure that sends email using standard PHP mail() function.

But your Windows SMTP server is not configured properly (mail relaying is forbidden):

1. In WIN2k, right click on My computer.

2. Select Manage.

3. When the Module loads, go all the way down to Services and Applications, and expand

the tree.

4. Expand the Internet Information Services tree.

5. Right click on Default SMTP Virtual Server, and select properties.

6. Select the access tab.

7. Click on the Connection button.

8. Select All except the list below.

9. Click on Ok.

10. Select Relay.

11. Select All except the list below (this should have already been set by default).

Note. (Normally not everyone wants to use your mail-server for relaying so it's probably better to set "Only accept from list below" and add the IPs that should be allowed to relay to the list. Typically you set this to 127.0.0.1 if your web server and SMTP-server are on the same machine.)

12. Click on Ok.

13. Apply your settings.

A: 1. Use the 'Payment gateways' form to add Authorize.net to your list of payment methods. Click the 'Configure' link next to the name of this CC processor to access Authorize.net settings dialog. Choose your account type. Enter your merchant login and transaction key exactly as they were given to you by Authorize.net authorities. Choose the currency and enter your MD5 hash value. Enter a prefix by which you will be able to identify the transactions from this X-Cart web store (it may be especially convenient if this account is used by several stores).

2. Log into your Authorize.net merchant account, go to Settings-> Response/Receipt URLs ,click on Add URL button and enter the URL of your store:

http://www.example.com/xcart_directory/home.php (POST method)

Also check that the following parameters are set as follows:

Settings-> Direct Response:

1. Direct Response Delimited Response: Yes

2. Default Field Separator: ,(comma)

Troubleshooting:

If Authorize.net is contacted successfully, but an error occurs during the transaction, you get a

message describing what is wrong. The message can be found on the error message page (in earlier versions in the browser address string). If the problem is caused by the fact that some 'required' field was left empty, your can go to Settings -> Payment Form -> Form fields and unselect the Required checkbox next to this field. Another possible reason for orders getting declined can be that the level of AVS checking may be too high, you can go to Settings -> Address Verification System Settings and try unselecting all Reject flags (if after that your orders start getting processed, it was the reason for the error).

If the transaction fails and you do not get any error message, it means that Authorize.net was not contacted. Please try the following:

1. Go to the "Summary" section of the admin interface and check whether at least one of the HTTPS modules is installed (OpenSSL, HTTPS-cli, Net:SSLeay, libCURL or CURL.). If none of the modules is installed, ask your host admins to install at least one of them.

2. Go to the "General settings" section of the admin interface and adjust the "Preferred HTTPS module" drop-down box (Choose which module installed on your host should be given preference. 'libCURL' or 'OpenSSL' would be the best option, if installed).

Notice that some of the HTTPS modules might not be working correctly even though they are shown as "installed" in the "Summary" section. If with some HTTPS module the inability to contact Authorize.net persists, try using another installed HTTPS module.

Q: I'm going to use VeriSign payflow PRO for credit card processing, how can I configure it ?

A: 1. From the 'Downloads' page of VeriSign Merchant Backoffice, download the 'Payflow Pro Software Development Kit (SDK)' for the operating system on which your X-Cart is installed. Unpack the downloaded archive file.

2. Copy:

(When using Windows NT and Windows 2000)

- the files bin/pfpro.exe and lib/pfpro.dll to the directory xcart/payment/bin;

- the contents of the directory certs to the directory xcart/payment/certs.

(When using Unix)

- the file bin/pfpro to the directory xcart/payment/bin;

- the file lib/libpfpro.so to the directory xcart/payment/lib.

- the contents of the directory certs to the directory xcart/payment/certs

3. Go to X-Cart admin interface, then go to Payment methods->VerSign PayFlow Pro->Configure. Provide your VerSign account information on the VerSign PayFlow Pro configuration page.

Q: When working in X-Cart admin area I get Access Denied message and I

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have to log into administrator area once again.

A: "Access denied" error may occur if you are logged in as Customer and Admin simultaneously from the same computer, your browser may overwrite session cookies that identify your PHP session. This behavior depends on the particular configuration of your computer.

Another reason may be session expiration. You can set up the desired session length in config.php:

$config["Sessions"]["session_length"] = 3600; # Session duration (in seconds)

Q: While running X-Cart I get the following error messages:

Warning: MkDir failed (Permission denied) in /u/http/user/xcart/Smarty-2.0/Smarty.class.php on line 1366

Warning: Smarty error: problem creating directory "../templates_c/-20/-2087024569"

in /u/http/user/xcart/Smarty-2.0/Smarty.class.php on line 470

Warning: Smarty error: problem writing '../temp8lates_c/-20/-2087024569/0.php.' in

/u/http/user/xcart/Smarty-2.0/Smarty.class.php on line 470

Warning: Failed opening '../templates_c/-20/-2087024569/0.php' for inclusion (include_path='.:/usr/local/lib/php4/lib/php')

in /u/http/user/xcart/Smarty-2.0/Smarty.class.php on line 1003

What is wrong?

A: The "templates_c" directory contains a cache of compiled templates. These errors occur because the web server does not have enough permissions to overwrite temporary cache files in templates_c directory. You probably copied them while moving X-Cart and these files now do not belong to the web server user.

To fix this issue just remove all your files from that directory. Everything will be created again by Smarty. Mind that this directory must have writeable permissions, which can be achieved by " chmod 777 templates_c" command.

Q: I'm trying to set up a credit card processor, but I get an error saying CC processor is not available, what is wrong?

A: Some payment processors that are integrated with X-Cart require Perl interpreter and Net:: SSLeay Perl module installed on your host (libCurl, CURL, Open SSL or HTTPS-cli can also be used).

Here is a list of some CC processors that require this module:

- Authorize.net

- PayPal IPN

- Plug and Pay

- Merchant Manager

- Intellipay

etc.

Check if there are any HTTPS request systems installed on your host. This can be done via the the 'Summary' page in the admin area. Then, preferred HTTPS module can be selected on the 'General options' page.

p.s. If you select Net::SSLeay perl module as your preferred HTTPS module, you should specify the full path to Perl interpreter executable in the General settings -> General options.

Q: We have a problem where intermittently we are unable to add products to the system. We go through the add product interface, enter the information, then submit it. The error message is "Access denied ! You are not allowed to access that resource!" The db user is definitely able to insert and update tables and sometimes works.

A: The most possible reason is that your PHP is configured incorrectly. Check the following PHP configuration settings (this requirement is specified in installation and configuration manual):

magic_quotes_gpc must be on

magic_quotes_runtime must be off

When magic_quotes_gpc is off and you product name/description contains apostrophe or some other special characters, they are not properly backslashed and MySQL insertion fails.

Q: When uploading files I get the following message:
Warning: open_basedir restriction in effect. File is in wrong directory in /usr/ local/home/vhosts/site/httpdocs/xcart/admin/partner_banners.php, what is wrong ?

A: Obviously the problem is in PHP configuration. Your PHP has open_basedir configuration parameter set.

Here is a quote from the manual:

=========

open_basedir string

Limit the files that can be opened by PHP to the specified directory-tree.

When a script tries to open a file with, for example, fopen or gzopen, the location of the file is checked. When the file is outside the specified directory-tree, PHP will refuse to open it. All symbolic links are resolved, so it's not possible to avoid this restriction with a symlink.

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So you must lift this restriction or move PHP temporary directory inside basedir.

Another possible solution is to move PHP temporary directory inside open_basedir directory, this option can be set in php.ini file.

Q: I get the following message:

Warning: mysql_fetch_array(): supplied argument is not a valid MySQL result resource in /www/public_html/xcart/config.php on line XX
What's wrong?

A: This message informs you that one of the queries to MySQL database failed. However, this error is not at line XX, here is located the wrapper function that just passes SQL queries to MySQL database and returns the result.

Possible reasons for such an error:

1. The version of the database does not match the version of X-Cart scripts. It can happen if you try to upgrade X-Cart by just replacing all PHP(tpl) files and leaving the database from the previous version. In this case the scripts are trying to work with new data format and fail because the database format is different.

2. Installation script did not finish to work properly (due to timeout or connection errors). In this case your database may be missing some tables or important data records.

3. One of the queries was improperly modified during customization.

To discover the reason for this error you can insert the following debug info in the body of the function that returns error:

if (mysql_error() != "") echo mysql_error();

For example, if the error line is:

return mysql_fetch_array($result);

you can modify it as follows:

$tmp = mysql_fetch_array($result);

if (mysql_error() != "") echo mysql_error();

return $tmp;

Q: How can I enable the users of my store to log in using HTTPS?

A: It can be done by selecting the 'Use HTTPS for users' login and registration' check box in General settings -> General options. If you select the 'Use secure login form on a separate page

(HTTPS)' check box, the authorization pages of your shop zones will contain links to separate pages from which the users of your store will be able to log into the appropriate zones via HTTPS.

Q: I want to change the time format to am- pm and not the 24 hour mode, how would I do that? (if there's a way)

A: Time format for your store can be selected using the 'Select time format' drop-down box in General settings -> General options.

Q: How do I remove SSN field from the customer registration form?

A: You can remove SSN and other fields that you do not want from the Profile details form via 'General settings -> User Profiles options': just remove the tick from the Active check box opposite the title of the field you would like to remove.

Q: In X-Cart versions 3.4.x the product table included 'brand' and 'model' fields. I would like to use these fields now, but it seems like they were removed. What should I do?

A: The 'model' and 'brand' fields were actually removed from our software, however they still exist in the database. You can easily restore the fields:

1. Edit the 'skin1/main/product_modify.tpl' template and replace the lines
{if $active_modules.Extra_Fields ne ""}
{include file="modules/Extra_Fields/product_modify.tpl"}
{/if}

with

<TR>
<TD class=ProductDetails height="11">Brand</TD>
<TD class=ProductDetails height="11">
<INPUT type=text name=brand size="18" value="{$product.brand}">
</TD>
</TR>
<TR>
<TD class=ProductDetails height="11">Model</TD>
<TD class=ProductDetails height="11">
<INPUT type=text name=model size="18" value="{$product.model}">
</TD>
</TR>
{if $active_modules.Extra_Fields ne ""}
{include file="modules/Extra_Fields/product_modify.tpl"}
{/if}

After that you will be able to modify the model and brand fields in the admin interface.

2. Edit the 'skin1/customer/main/product.tpl' template and replace the lines

{if $active_modules.Extra_Fields ne ""}
{include file="modules/Extra_Fields/product.tpl"}
{/if}

with

{if $product.model}<tr><td width=30%>Model</td><td nowrap>{$product.model}</td></tr>{/if}
{if $product.brand}<tr><td width=30%>Brand</td><td nowrap>{$product.brand}</td></tr>{/if}
{if $active_modules.Extra_Fields ne ""}
{include file="modules/Extra_Fields/product.tpl"}
{/if}

After that your customers will be able to see the brand and model fields on the product details page.

Q: What is CSV format?

A: Excel CSV definition:

CSV (Comma delimited) format

The CSV (Comma delimited) file format saves only the text and values as they are displayed in cells of the active worksheet. All rows and all characters in each cell are saved. Columns of data are separated by commas, and each row of data ends in a carriage return. If a cell contains a comma, the cell contents are enclosed in double quotation marks.

If cells display formulas instead of formula values, the formulas are converted as text. All formatting, graphics, objects, and other worksheet contents are lost.

Note. If your workbook contains special font characters such as a copyright symbol (©), and you will be using the converted text file on a computer with a different operating system, save the workbook in the text file format

appropriate for that system. For example, if you are using Windows and want to use the text file on a Macintosh computer, save the file in the CSV (Macintosh) format. If you are using a Macintosh computer and want to use the text file on a system running Windows or Windows NT, save the file in the CSV (Windows) format.

Q: I got the following error:

Fatal error: Allowed memory size of 8388608 bytes exhausted (tried to allocate 3840 bytes) in /var/www/html/xcart/Smarty-2.1.1/Smarty.class.php on line 107 What is that all about?

A: This error was caused by problems with memory allocation in PHP module.

Please check if PHP module at host is compiled with the option '--enable-memory-limit'. This setting sets the maximum amount of memory in bytes that a script is allowed to allocate. You can

find that out that with the help of the function phpinfo();, i.e. create a file (PHP script) named phpinfo.php in web-public directory on Windows box and put into it the following line:

<? phpinfo(); ?>

Then run this PHP script with the help of your browser, i.e. put address like

http://<your_windows_box_address>/phpinfo.php and check if the line Configure Command has option -enable-memory-limit listed.

As a solution you can try (or ask your system support to do that) to re-install PHP module at your host to the latest one without --enable-memory-limit configuration option.

8.3   **FAQ on Design**

Q: I want to make X-cart customer front end a default page for my site, how can I do it?

A: You should put file index.html into the root directory of your site. This file should contain the following HTML code:

```
<html>
<head>
<meta HTTP-EQUIV="Refresh" content="0; URL=xcart/customer/home.php">
</head>
<body>
</body>
</html>
```

Note. If your X-cart installed in some other directory, path in URL field may be different.

As an alternative variant you can create file index.php with the following contents:

```
<?
header("Location: xcart/customer/home.php");
?>
```

Q: How can I customize the look of my X-Cart store?

A: The look of your X-Cart can be customized in the following way:

1. You can modify the Smarty-templates. Smarty-templates are all the '.tpl' files inside the '<xcart-dir>/skin1/' directory. Use either FTP or the 'Edit templates' or 'Webmaster mode' features to do that. Webmaster mode is the most sophisticated way to edit templates. Please refer to our manual in order to learn more how to use the mentioned features. Also, you can refer to http://smarty.php.net/manual/en/ in order to learn more about Smarty.

2. You can modify the color scheme by editing the '<xcart-dir>/skin1/skin1.css' file. Use either

FTP or the "Edit templates" feature to do that.

3. You can re-upload the default images stored in the '<xcart-dir>/skin1/images/' directory. Use either FTP or the "Edit templates" feature to do that. For instance, in order to replace the default logo image, you should re-upload the '<xcart-dir>/skin1/images/xlogo.gif' file.

4. Most of X-Cart texts are stored in so called "language variables". For instance, if you see a statement like {$lng.txt_site_title} in your templates, it will be substituted with the content of the 'txt_site_title' language variable. You can edit the language variables under the 'Languages' section of the admin interface.

Perhaps you might want to modify the following templates:

skin1/customer/home.tpl - the main template, all other templates are directly or indirectly included into this one.

skin1/customer/categories.tpl - the categories list on the left of the screen.

skin1/customer/main/subcategories.tpl - the subcategories list in the central space.

skin1/head.tpl - the header part of the screen.

We believe you will find the 'Webmaster mode' feature most convenient for modifying the look of your store. It will help you find and edit templates and language variables that need to be edited.

Q: I'm going to redesign the look of X-Cart, but I don't know where to start. Which templates should I edit for the basic changes?

A: Here is the list of templates you will need to edit to make basic changes:

skin1.conf

head.tpl

location.tpl

customer/main/welcome.tpl

copyright.tpl

help/conditions.tpl

mail/signature.tpl

Q: How do I make a new welcome message for my store?

A: If you open the '<xcart_dir>/skin1/customer/main/welcome.tpl' template, you will see following statement there:

{$lng.txt_welcome}

When a customer visits your site, the {$lng.txt_welcome} statement is substituted with the value of the 'txt_welcome' language variable.

Below is described how to modify the 'txt_welcome' language variable:

1. Log into the admin area of your shopping cart.

2. Go to the 'Languages' section of the admin interface.

3. Select a language in the 'Edit language' selectbox.

4. Select a topic: Text. (text for :txt_, Errors for err_)

5. Find the 'txt_welcome' variable and edit its value.

Similarly you can edit other texts, labels or messages appearing on X-Cart pages.

6. Click on the 'Apply changes' button.

'Webmaster mode' enables you to edit language variables in a still easier way: all you will need to do is to click on the text and edit it. Please refer to our manual in order to learn more about the 'Webmaster mode' feature.

Q: How can I find a particular template by its contents ?

A: Just a hint about finding the required template. To find a specific template you should use any utility that searches for files by their content. In Windows you can press F3 from "My computer" window to access the search dialog. In UNIX you could use grep utility. For example, if you want to find the template that stores information about the store being a demo, just search for a file that contains "This is a demo store". Please note that all templates by default are located in skin1 directory. You can also use X-Cart debugging console to explore the template structure. Enable this option in General settings>General options and you will see the hierarchy of templates from which the current page is assembled. With the help of this console the required template can be easily located and customized.

Note. If you are using the multilingual installation of X-Cart, the text that appears in X-Cart interface is stored in the database.

Q: I cannot edit templates using the built-in template editor, it says permission denied, how can I overcome it ?

A: To allow the built-in editor to save templates on the disk you need to set the appropriate permissions for the /skin1/ directory and all the files under it. Typically PHP runs from another userid (httpd) and does not have the rights to write the templates. To fix it you must issue a shell command "chmod -R 777 skin1". Please note that this is a shell command, not FTP. FTP does not have the "-R" switch, which means "recursive". To do the same thing over FTP you will have to "chmod 777" each file and directory.

Please note that after finishing X-Cart customization you should set permissions to 0755 for security reasons.

Q: I was customizing X-Cart and suddenly got an error saying something like: Parse error: parse error, expecting `}'' >in /domains/httpd/xcart/templates_c/-12/-1215544790/0.php on line 211.

What's wrong, I never edited the file 0.php ?

A: That means that you altered the Smarty code while modifying the templates, and Smarty encountered an error while trying to compile your template in PHP script. Usually that means that there are unclosed {section} {/section} or {if} {/if} tags or errors in expression. Please be careful while modifying templates, we also recommend you to learn Smarty basics (http://smarty.php.net/) to modify your templates more effectively.

Q: How do I add Terms & conditions?

A: You can place your Terms & Conditions into templates. Use our built-in template editor to edit templates. Put Terms&Conditions destined for customers into help/conditions_customers.tpl, and Terms&Conditions for partners - into help/conditions_affiliates.tpl.

Q: I don't like the picture shown by X-Cart in the place of a product thumbnail when no image is available for a product. How can I change it ?

A: If no thumbnail picture was selected for a product, your customers will be shown the default image saying 'No Image Available'. The default image is stored in the file default_image.gif in the root directory of X-Cart. It can be replaced with any picture you like (e.g. blank picture).

Q: The thumbnails of my products are OK, but I want my customers to be able to view my products in detail. Is there a way to add detailed pictures?

A: X-Cart has Detailed Product Images module which is enabled by default. This module makes it possible for you to add as many detailed images to any product as you wish.

You can do it on the 'Product Management' page through the 'Detailed images' section. The Detailed View of a specific product enables your customers to see the detailed images below the product description.

8.4   Other FAQ

Q: How do I know which version of X-Cart I have?

A: You can find out your X-Cart version via the following URL: http://www.yoursite.com/ xcart_directory/VERSION

Q: There are upgrade patches in my file area, what are they for and how can I use them?

A: Since version 3.2.0 X-Cart has a built-in upgrade engine which allows you to upgrade your software to newer versions. Detailed instructions on the application of upgrade patches can be found in the UPGRADE.readme file in X-Cart root directory.

An upgrade patch is a set of files which describe the differences between the code of the older and the newer versions. All the changes are described in the standard diff format (UNIX unified diff format). Diff files describe what pieces of code should be added/replaced/deleted. Normally diff files contain samples of the old code that need to be removed from the original file and pieces of the new code that should be inserted in their place.

The main advantage of this approach is that diff patch technique allows you to upgrade even customized versions of X-Cart.

X-Cart upgrade engine follows the list of files from the file file.lst and tries to patch them, then database upgrade procedure is performed.

If no changes have been made to the original code of the shopping cart, upgrade will be performed successfully with 100% probability. However, X-Cart is a highly customizable product and most X-Cart users modify it's code and templates according to their needs. Here comes the possible problem: if a piece of code that needs to be patched was altered, the patch engine cannot patch it and you get a notification about it. So if you changed X-Cart code, you should be prepared to resolve these conflicts manually.

X-Cart patch engine creates a log file that reflects the progress of applying a patch in the file templates_c/upgrade/patch.log. The hunks that were not applied are stored in reject files filename.ext.rej. Using this information you can see what pieces of code were not patched and patch them manually.

For more information on upgrade procedure and instructions, please refer to the manual included into archive with upgrade patches.

Q: I am experiencing problems with upgrading X-Cart via the built-in Patch/ Upgrade center. Is there anyone who could help me with that?

A: X-Cart is open source software, so each X-Cart based shop owner can get it customized according to his needs. This condition sometimes makes the upgrade a very sophisticated task. If a lot of code (templates) was changed during customization, it may cause conflicts and the upgrade script may fail. In this case you will have to explore the conflict places manually and incorporate changes by hand, or hire our professionals to do it for you. You can contact our technical support for details on basic upgrade services.

Q: Is it possible to move a category so it will be located inside another category?

A: Yes, it is. This can be done the following way. For example you need to move the category 'CD' into the category 'CD-DVD-VIDEO'. Enter the 'Categories Management' section through the admin interface. Select the radio button next to the category 'CD' and click on the 'Modify

selected' button. In the 'Category location' subsection of the 'Modify category' form select 'CD-DVD-VIDEO', then click on 'Update'. The category 'CD' will become a subcategory of the category 'CD-DVD-VIDEO'.

Q: I have a file with my products list and I want to import it into X-Cart, how can I do it ?

A: 1. You can import products into your X-Cart store from the provider interface using 'Import Products' dialog.

For example, you have data in the following format:

Leather jacket;250;5;This jacket is made of natural leather;Clothes/Jackets;jacket.gif

Black gloves;30;0.5;Fine quality gloves;Clothes/Gloves;gloves.gif

Then you should set the order of columns as follows:

0: product

1: price

2: weight

3: descr

4: category

5: thumbnail

The other columns should be set to NULL

Note. If your file format is different you should specify a different columns order.

In this example 'Leather Jacket' will be placed in the subcategory 'Jackets' of 'Clothes'

category, and 'Black Gloves' will be placed in the subcategory 'Gloves' of 'Clothes' category.

Note. Do not use / symbol in the name of the category, this symbol is used as a category separator.

If 'category' field is specified, 'default category' field is ignored.

If you have thumbnails for the product you should put them all into one directory and specify its name in the field 'Directory' where images are located.

2. You can use 'Update Inventory' dialog to update your products pricing and quantity in stock.

File format for inventory updating:

78979;10.50

7223;99.75

98753;124.99

In this file the first column is product SKU (SKU is assigned to every product automatically at the time of its creation). You can find the product SKU in the Product details section, or before the name of the product in the Search results table. The second column is the price or quantity of the

product, depending on your choice in 'Update inventory' dialog.

Q: Can you explain the purpose of product option exceptions and how I can use them?

A: Exceptions mechanism allows you to define mutually exclusive combinations of product options.

For example, you sell T-shirts available in green and red. You want to enable your customers to choose the color of the T-shirt they buy. So you define the following options:

Color

    Red

    Green

Red T-shirts are available in sizes L, XL and XXL, green T-shirts – only in sizes L and XL (no XXL). So you define the following options:

Size

    L

    XL

    XXL

and set up an exception for green T-shirts:

Color=Green;Size=XXL

As a result your customers will not be able to order a green T-shirt that is size XXL.

Q: X-Cart displays prices in two different currency units at the same time, e.g. Our price: $ 5.99 (EU 6.89). How do I get rid of the converted price (EU 6.89) after the US price?

A: To get rid of the alternative currency price, go to 'General settings->General options' section and empty the 'Alternative currency symbol' field.

Q: Can you tell me what exactly I should do to set up featured products ?

A: Featured products are products to which you want your customers to pay attention. You can set up featured products to be displayed on the main page of the store or within a particular category. Enter the 'Categories Management' section through the admin interface. Click on the name of the category for which you want to set featured products (if you want to add products to your front page do not select any category). Scroll down to the bottom of the page where you will see 'Featured products' dialog for adding/removing featured products. Click on the 'Browse' button in the 'Add Product' subsection, select the required product. When the product name appears in the box, click on 'Apply'. The product should appear in the featured products list.

Important notes:

1. When your product is out of stock, it will appear anyway in the featured products list in admin interface but will not be shown in the customer interface.

2. Featured products should be added only to categories that contain no products located outside of subcategories. E.g. If the category 'Books' contains products that are not included into subcategories, you will be able to add featured products to it, but they will not appear in the customer interface. To resolve this problem relocate the individual products so they will be included into the subcategories of the category 'Books' (create subcategories if there aren't any). The products from the Featured Products list will appear on the storefront.

Q: Can I sell downloadable products (software, pictures, music etc.) with X-Cart?

A: To sell electronically distributed goods you need to enable EGoods module from the modules list (see Administration menu -> Modules in the admin interface). If this module is enabled, "ESD distribution" input line appears after the product name in Product details dialog when you modify a product. This line should be used to enter the path to the downloadable file.

In order to upload distributions to your site you should use Files item of the Inventory menu. When a customer orders an electronically distributed product, his order is processed and he receives a letter with a download key. If you are using manual processing the letter is sent to the customer when you set his order status to "Processed" (P).

 The download key is an URL which is used by the customer to download the file that he purchased. It looks something like this: 'http://www.yoursite.com/xcart_directory/customer/download.php?id=920e98f7d889eb7781a'.

Download keys are generated automatically and are valid for a limited period of time.

You can specify the time of key expiration by editing the field 'Download key TTL' in General settings -> General options.

When you upload ESD files via Inventory menu -> Files, they are placed inside 'files' directory (in X-Cart Pro version the files are placed in 'files/provider_login' directory where the provider's login is the login of the provider who owns this ESD product).

If the size of your ESD files is very large, it may be impossible to upload them via Files menu (most web servers have 8Mb upload limitation), you can upload your files directly to 'files' directory (or to the appropriate provider's directory).

You should use web server functionality to disable direct download from the 'files' directory, otherwise any person will be able to get access to ESD files without purchasing them. If you are using Apache web server you can use .htaccess file with "Deny from all" directive in it. If you are using IIS, you should open 'Access permissions' dialog and disable reading from the 'files' directory.

Q: I'm selling music, video, etc. How can I make audio video samples available for preview by my customers?

A: If you want to provide your customers with sample audio files, video fragments or any other

sample files associated with your product, you can use extra fields feature. Use the provider interface to add a new extra field, for example, it could be called 'Sample'. Open the product details section for modification. Enter the following

HTML code into the 'Sample' field:

<A href="http://www.samplesite.com/preview/sample.avi">Preview<A>

If your customer has a proper player installed, he will be able to click this link and view the fragment or listen to the audio file when he views the product details.

Q: What is X-Affiliate module for and how does it work?

A: X-Affiliate system is a tool that can be used to promote your online store. When you use X-Affiliate you have a special type of users - partners. A partner is a person who places on his site a banner with a link to your store. When a customer clicks on such a banner, he is redirected to your store with a special parameter so XAffiliate 'knows' which partner referred this customer. If the customer then buys something at your store, X-Affiliate software makes a record of this and calculates your partner's commissions (as a percentage from the deal or as a flat rate). Thus, partners are interested in promoting your site, as they get money for being your sales agents.

After you install XAffiliate module a new area and a new type of users appear in your X-Cart based store. If admin allows signup for everybody, people will be able to sign up for the affiliate program in the customer zone of your store. Alternatively admin can create affiliate logins himself. In his personal area an affiliate can get HTML code for the banners, or view current information on his commissions.

In administrator interface you can define banners which will be available to affiliates (all necessary HTML code is generated automatically) and set commission rates. The store administrator gets all the necessary tools for viewing commissions, searching for commissions, getting statistics for a particular partner, uploading information about the payment of commissions to partners, etc.

Q: How does membership mechanism work in X-Cart?

A: Membership feature in X-Cart is used to provide special services (access to particular categories, special pricing) for specific groups of clients. Membership levels are assigned by the store administrator to particular customers. You can change membership levels through the Users Management section (click on Users, search for the user whose membership level needs to be changed, go to his Profile details page and set the desired membership level).

X-Cart supports "signup for membership" feature. There is a drop-down box in user registration form containing the list of membership levels available in the shop.

If a customer claims he is fit for a certain membership level he can select this level in the registration form. The selected membership level is not granted to the customer immediately: he needs to get the administrator's approval first. The store administrator can view all customers whose requested membership levels do not correspond to their actual membership levels and

decide whether to grant the requested level or not. You can get a list of such customers by selecting Pending membership in the user type field of advanced search options section of the search form. Membership signup feature is set to "off" by default and can be turned on by setting "Moderated sign-up for membership" in General settings->General options section of the admin area.

To restrict access to a category based on the membership level you should set the membership level to which the category should be available in the category properties.

The price of your products may also be different for different membership levels. You can set prices valid for different membership groups through the Wholesale prices section of the Product Management page ("Wholesale Trading" module has to be activated).

Q: I logged into the admin zone but I do not see Products and Inventory menus.

A: You have the professional version of X-Cart (X-Cart PRO) where admin manages the store (setting up user accounts, modifying general setting, etc) and providers manage products.

Providers can be logged in using the special provider interface: http://www.yoursite.com/xcart_directory/provider/home.php

Each provider has his own products and manages them individually.

If you do not need the multi-provider support, you can switch your X-Cart to Simple Mode, so the administrator will be able to control the store operation and manage products from one interface. Simple Mode can be switched on through the Modules section of the admin zone (See Modules item in Administration menu).

Q: I tried placing an order at my store as if I were a customer and I got "Sorry, there are no shipping methods for your location" error. What is wrong?

A: There are 2 major groups of shipping methods that you can use at your store:

1. Shipping methods with manually defined rates

2. Shipping methods the rates for which are defined via real-time calculation services

The first group includes all the methods for which rates can be set up through 'Shipping charges' in the provider zone (the methods invented by you + the methods which are listed in the 'Real-time calculated shipping methods' subsection of the 'Edit shipping methods' form but do not get rates from real-time calculation services).

The second group includes methods the rates for which are delivered by Intershipper or by special integrated modules from real-time shipping services like UPS, USPS, FedEx, Airborne, etc.

If you are using methods from the first group, the problem is probably caused by the fact that no shipping rates were specified for them. Use the 'Shipping charges' section of the provider interface to set up the necessary rates.

If you are using methods from the second group, getting the 'no shipping methods' error means the settings of your real-time shipping methods are wrong.

1) Make sure you enabled the 'Real-time shipping calculation' check box on the 'Shipping options' page.

2) If you want to use Intershipper, make sure both the 'Real-time shipping calculation' and 'Select this if you are going to use Intershipper calculation services…' check boxes are selected.

3) You need to have a registered account to use all the real-time shipping calculation services (except FedEx). Make sure you entered your account information into the appropriate section of the 'Shipping options' page.

4) Intershipper, UPS and USPS require EXPAT extension for php. Make sure you have that.

5) If you want to use FedEx, make sure you imported FedEx tables from FedEx site.

6) UPS module requires an HTTPS request system like Net:SLeay, libCURL, CURL, Open SSL or HTTPS-cli. The problem may be caused by the fact that Net:SLeay (CURL, libCURL) module is not installed on your system. Open the Summary page through the Administration menu in the admin area and check if Net:SLeay or any other HTTPS request system executable components exist. P.S. If you select the Net:SLeay perl module as your preferred HTTPS module, you should specify the full path to Perl interpreter executable in General settings -> General options.

Q: Some of the featured products that I set up are not shown in the customer area.

A: Please note that the products you included into the Featured products list will not be shown on the storefront if their quantity in stock is zero (A product is removed from the Featured products list as soon as all the items of this product are sold). Also please note that you cannot set up featured products for a category that contains independent products (two lists of products in one category does not sound like a good idea).

Q: I do not see 'Shipping methods' in the admin zone menus. Where can I define shipping methods for my store?

A: Shipping is disabled in X-Cart by default, so you need to go to 'General settings -> Shipping options' section and remove the tick from the 'Disable shipping' check box before the 'Shipping methods' menu item appears in the Management menu.

Q: I'm confused within the 'Shipping charges' area. Can you explain to me how shipping charges are calculated?

A: Shipping charges in your store are calculated according to the formula:

SHIPPING = Rate + TOTAL_WEIGHT*Weight_Rate +

+ ITEMS*Item_Rate + SUM*Percent_Rate/100

This formula shows how pre-defined shipping charges are calculated.

You can specify shipping charges based on order weight by specifying a non-empty value in

Range column in Weight field.

Example:

if you set up Weight to 5 lbs and Flat to 10 and leave all other fields untouched you will get the shipping cost of $10 for orders which weigh from 0 to 5 lbs, i.e.

SHIPPING = 10 (Flat) + 1 (Weight of order, for example) * 0 (Per lbs) + 1 (Number of items in cart, for example) * 0 (Per item) + 10.99 (Order cost, for example) * 0 (%) /100 = 10.

 If you set up Order Total to 100 and % to 10 you will get shipping cost equal to 10% from order total if order total is from 0 to $100.

 SHIPPING = 0 (Flat) + 1 (Weight) * 0 (Per lbs) + 1 (Number of items in cart, for example) * 0 (Per item) + 10.99 (Order cost, for example) * 10 (%) /100 = 10.

Q: We are in need of creating a shipping charge of $6.50 for orders from $0.00 to $150.00. Shipping is $0.00 for orders totalling $150.01 and above. How can we get X-Cart to cover both the cases?

A: You should define two shipping rules:

1) for orders from $0.00 to $150.00

2) for orders $150.01 and above

Take these steps:

1. Go to the admin zone, click on the 'Shipping methods' menu item.

2. Create a shipping method.

3. Go to the provider zone, click on the 'Shipping charges' menu item.

4. Create 1st rule:

Choose the necessary shipping method and the destination zone for that shipping method. Specify the value of the 'Order subtotal' field as 150 and set flat rate to 6.50.

5. Click on 'Add'.

6. Create 2nd rule:

Choose the same shipping method and the destination zone for that shipping method. Specify the value of the 'Order subtotal' field as 9999999999 and set flat rate to 0.

7. Click on 'Add'.

Q: Is there a way I could purchase a CD version of X-Cart?

A: Legally, no. X-Cart is a downloadable product. Once your order is verified you will be allowed to download it in the Private Members Area.

Part

9

9   Appendix

9.1   PayPal Pro Notes

Website Payments Pro (Express Checkout and Direct Payment)

In order to use the Website Payments Pro suite of products, you must have a business account.

I. **I do not have an existing PayPal account:**
  1. Go to https://www.paypal.com/cgi-bin/webscr?cmd=_registration-run
  2. Choose to create a Business account
  3. Choose country and click on Continue
  4. Business Account Sign Up:

      a. Fill out your business information

      b. Fill in the business owner contact information

      c. Fill in your business owner address and click on Continue

      d. Enter in your email address

      e. Choose your security questions

      f. Accept the user agreement and legal policy

      g. Type in your security measure

      h. Click on Sign Up
  5. Be sure to confirm your address by adding a credit card to your funding source
  6. Verify your email address by checking your email address and follow instructions in the PayPal email address
  7. Add a bank account to your funding source to be a Verified member. This process may take several business days. Follow the instructions on the PayPal site to add a bank account.
  8. Go to section III to setup your account configuration

II. **I have an existing Personal or Premier account with PayPal**
  1. Go to https://www.paypal.com/cgi-bin/webscr?cmd=_registration-run
  2. Click on the Upgrade your Account link
  3. Click on the Upgrade Now button
  4. If your account was a personal account, you will get a choice to upgrade to a Premier or Business account.
  5. Choose to upgrade to a Business account and follow instructions.
  6. If you were a Premier account holder, you will be sent to the Business account upgrade. Follow the instructions.
  7. Follow Steps 5-8 in Section I if you have not done so
  8. Go to section III to setup your account configuration

III. **Upgrading to a Business Account**
  1. Cut and paste this URL into your browser: https://www.paypal.com/us/cgi-bin/webscr?cmd=_dcc_hub-inside

2. If you do not have a business account with PayPal, you will see a Upgrade to Business Account link

3. Click on the link and follow the process for upgrading

IV. **Applying for the Website Payments Pro application**

1. Cut and paste this URL into your browser: https://www.paypal.com/us/cgi-bin/webscr?cmd=_dcc_hub-inside

2. Click on the Submit Application link on the page

3. Fill out your information. You will be required to have a social security number for this application

4. Submit your application. Approval will take between 24-48 hours to approve. You will get an approval email or you can visit the sign up page again: https://www.paypal.com/us/cgi-bin/webscr?cmd=_dcc_hub-inside

5. Once you are approved, go to his site again: https://www.paypal.com/us/cgi-bin/webscr?cmd=_dcc_hub-inside

6. You should see a Complete Billing Agreement link on the page. Click on that link and agree to the billing information. Pilot participants will be waived the monthly fee until the end of October, 2005.

7. You will be taken back to the Direct Payment API page where you can choose to download a certificate. Check with your cart provider to see if you will need to.

Express Checkout Only or PayPal as An Additional Mark Only Option

I. **I do not have an existing PayPal account:**

1. Go to https://www.paypal.com/cgi-bin/webscr?cmd=_registration-run

2. Choose to create either a Premier or Business account

3. Choose country and click on Continue

4. Premier Account Sign Up:

   a. Fill out your personal information

   b. Enter in your email address

   c. Choose your security questions

   d. Accept the user agreement and legal policy

   e. Type in your security measure

   f. Click on Sign Up

5. Business Account Sign Up:

   a. Fill out your business information

   b. Fill in the business owner contact information

   c. Fill in your business owner address and click on Continue

   d. Enter in your email address

   e. Choose your security questions

   f. Accept the user agreement and legal policy

      g. Type in your security measure

      h. Click on Sign Up

6. Be sure to confirm your address by adding a credit card to your funding source
7. Verify your email address by checking your email address and follow instructions in the PayPal email address
8. Add a bank account to your funding source to be a Verified member. This process may take several business days. Follow the instructions on the PayPal site to add a bank account.
9. Go to section III to setup your account configuration

II. **I have an existing Personal account with PayPal**
1. Go to https://www.paypal.com/cgi-bin/webscr?cmd=_registration-run
2. Click on the Upgrade your Account link
3. Click on the Upgrade Now button
4. If your account was a personal account, you will get a choice to upgrade to a Premier or Business account.
5. Choose the type of account to upgrade to and follow instructions.
6. If you were a Premier account holder, you will be sent to the Business account upgrade. Follow the instructions.
7. Follow Steps 6-8 in Section I if you have not done so
8. Go to section III to setup your account configuration

III. **I have a Premier or Business account with PayPal**
1. Go to https://www.paypal.com and sign in
2. Click on the Profile section under the My Account Tab
3. Under the Account Information column, you should see the API Access link, click on that link (if you do not see it then your account is not Premier or Business, go back to Sections I or II)
4. In the API Access page, click on the second link: "API Certificate Request" and download your certificate

Checklist for Website Payments Pro Sign Up
1. Get a verified business account

• If you do not have a PayPal account, sign up for a PayPal account:

Point your browser to this URL: https://www.paypal.com/cgi-bin/webscr?cmd=_registration-run

Choose Business Account and click on Continue.

Sign up for an account and follow instructions for verifying your email address.

Please also add a bank account to confirm your address, instructions should be available during the process.

Once you have been approved for a business account, go to step 2.

• If you have a personal PayPal account, upgrade it to a business account:

Point your browser to this URL: https://www.paypal.com/cgi-bin/webscr?cmd=_registration-run

Click on the 'Upgrade your Account' link in the yellow box towards the upper right hand corner:

Already have a

PayPal account?

Upgrade your account

Click on the Upgrade Now Button on the following screen.

Follow instructions for the upgrade process

Once you have been upgraded to a business account, go to step 2.

2. Log into your account at https://www.paypal.com

3. Cut and paste this URL into your browser:

https://www.paypal.com/us/cgi-bin/webscr?cmd=_dcc_hub-inside

Click on the Submit Application link on the left hand side of the page.

4. Fill out your information and submit the application.

After you submit your application, it will take between 24-48 hours to get approval. Please wait and check your email for the approval notice.

5. Go back to this URL:

https://www.paypal.com/us/cgi-bin/webscr?cmd=_dcc_hub-inside

You must wait to receive your approval email from PayPal before you go back to this site. You may have to log into your PayPal account when going to this PayPal site.

You can also return to this link to see if you have been approved. If you have been approved, you should see the "Complete Billing Agreement" link, go to step 5.

6. Click on the Billing Agreement link on the left hand side of the page.

This is the billing agreement for the $20/month flat fee that you will be charged for using the Website Payments Pro product.

7. Certificate download

Log into your PayPal account

Click on PROFILE

Click on API ACCESS under the ACCOUNT INFORMATION column

Click on the API CERTIFICATE REQUEST link

Fill out your information and choose a password and hit Continue

Review your information and hit Generate certificate

Your certificate will take around 3 business days to get approved, an email will be sent

8. Activate your APIs

Log into your PayPal account

Click on PROFILE

Click on API ACCESS under the ACCOUNT INFORMATION column

Click on the API ACCESS AUTHORIZATION link

Click on the ADD button

Enter in your API Account Name

Check on the necessary API check boxes. At a minimum, you must check

AddressVerify

SetExpressCheckout

GetExpressCheckoutDetails

DoExpressCheckoutPayment

DoCapture

DoReauthorization

DoVoid

DoDirectPayment

Click on Save

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