

# X-Cart Shopping Cart Software

## Reference Manual



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Company website: [www.x-cart.com](http://www.x-cart.com)

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## Reference Manual

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*This is the Reference Manual for X-Cart shopping cart software, v. 4.1.10. 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. It is not intended for use with X-Cart versions prior to X-Cart 4.1.0 due to the many functional differences between X-Cart 4.1.x and all the previous versions.*

# **X-Cart Shopping Cart Software Reference Manual**

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## Welcome to X-Cart 4.1.x

X-Cart is a complete e-commerce solution that provides all you need to build, operate and maintain an online store. One of the most feature rich e-commerce solutions of today, X-Cart offers configuration flexibility and the industry's leading environment for customization.

In its earlier incarnations, X-Cart has already won world-wide recognition for its outstanding feature set and ease of customization and use. X-Cart 4.1 offers everything that the earlier versions included and much more. The application has undergone a major overhaul, which means we have added quite a number of exciting new features and made X-Cart still more powerful and user-friendly than it used to be.



# 1 Introduction

This section provides basic information about X-Cart.

- See the chapter [Getting Help](#) for details on using this help and getting more information about X-Cart.
- See the chapter [Understanding X-Cart](#) to find out what X-Cart shopping cart software is, how it works and what you can do with it.
- Refer to the section [X-Cart Key Features](#) for an overview of features provided by X-Cart.
- Check out [What's New in X-Cart 4.1.x](#) for details on the new features and performance enhancements introduced in X-Cart 4.1.0.
- Study [Licensing](#) for a 'plain words' explanation of X-Cart's licensing policy.

## 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](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>).

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](http://www.x-cart.com/contact_us.html)) or by posting a message to [sales@x-cart.com](mailto:sales@x-cart.com).

If you are a registered client, you can get customer service and technical support via your personal HelpDesk 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 Understanding X-Cart

This section provides information about X-Cart's functionality and technology, draws a difference between X-Cart's GOLD and PRO editions and explains X-Cart's user accounts.

See:

- [Functionality](#)
- [Technology](#)
- [X-Cart GOLD and PRO](#)
- [X-Cart User Accounts](#)

## 1.2.1 Functionality

X-Cart is a professional store builder and shopping cart solution. Although it is most often referred to as 'shopping cart software', X-Cart is not merely a shopping cart. It is a powerful e-commerce system featuring web-based administration, a completely customizable front-end, a product catalog, inventory tracking, a side-bar shopping cart, shipping and taxes calculation, advanced web-site promotion tools, search engine optimization, multi-language support and much more.

Designed to be a reliable and efficient platform for e-commerce websites, X-Cart allows you to build a professional-looking and easy to use online store as quickly and efficiently as possible. A variety of configuration options for appearance and general behavior ensures that a newly installed X-Cart-based store can be fine-tuned to your environment and business needs in just a few hours. You have the ability not just to add products and prices, but also to define shipping and handling rates, taxes, discounts, shipping destinations to deny or accept, shipping methods to use, payment methods to accept, etc.

X-Cart's web-based administration allows you to manage your online store from any computer connected to the Internet. An intuitive web interface provides capabilities for managing products, users and orders, virtually making the process of operating your store point and click easy.

Using a database for product management allows you to keep your product information up to date without having to worry about programming or writing HTML code.

Whether you are selling ten products or tens of thousands of products, X-Cart showcases them in a way captivating and informative to the site visitors. An intuitive interface, easy site navigation and product search support make your store an attractive e-commerce environment for customers.

X-Cart's scalable architecture allows you to easily extend your store's basic functionality with such powerful e-commerce features as detailed product images, product variations, newsletter management, fraud prevention, coupon codes, wholesale prices, gift certificates, wish lists and others.

Although X-Cart e-commerce software can be used 'out of the box', you can choose to customize it, so the front-end of your store will have its own unique look and feel. X-Cart's template-based structure and optimized code make the process of implementing even the most sophisticated design in an X-Cart-based store a positive experience. A built-in template editor, a debugging console and a special operating mode for WYSIWYG text editing facilitate customization of X-Cart templates, making it fast and hassle free.

Due to the extensive set of features, overall flexibility and ease of customization, X-Cart has become e-commerce software of choice for thousands of online store owners all over the world. We are hoping it will become a solid foundation for your business and will help you succeed in e-commerce.

## 1.2.2 Technology

From the technological viewpoint, X-Cart is a PHP/MySQL-based web application using Smarty. After installation, this application runs on a web server and can be controlled via a web interface. This means that users can access the online store powered by this application from anywhere in the world provided there is an Internet connection and a web browser.

Of course, most people who will use your store will not care about the technical details; however, what is perceived by the users as simply browsing the store pages and selecting options is in fact a much more complicated process.

For those of you interested in the behind-the-scenes side of things, every page of your store is generated by X-Cart application in response to requests from the users' browsers. When a person working with your store submits information through the application's web interface, his or her web browser forms a request to the web server where X-Cart software is running; on the server, X-Cart's PHP code processes the browser request and connects to the MySQL database server to request retrieval of the necessary data from the store database (in some cases, data may also be written to the database); Smarty template engine finishes processing the request and handles output presentation. As a result, X-Cart generates a web page which the user sees from his web browser as a page of an online store's storefront or back-end.

## 1.2.3 X-Cart GOLD and PRO

X-Cart software comes in two Editions: X-Cart GOLD and X-Cart PRO. Both the Editions provide almost every feature one would expect of an e-commerce storefront solution. X-Cart GOLD best suits small and medium-sized businesses, while X-Cart PRO has every chance to meet the expectations of larger companies and enterprise corporations. Let's see how one version differs from the other.

In X-Cart GOLD, the store back-end (a zone of the store that allows the store's administration and management staff to control the storefront) represents a single environment. Any person who has access to the store back-end has unlimited access to all the controls one might need to maintain and manage the store. The tasks of configuring the store settings, managing users, adding products and processing orders can all be performed by the same person. It is possible to create more than one user accounts providing access to the store back-end. All these accounts will have exactly the same privileges, and any activity performed by a user of such an account in the store back-end will affect the entire store. The way in which the store back-end functions in X-Cart GOLD makes X-Cart GOLD an almost perfect solution for businesses where the store is managed and maintained completely by one person (typically, the store owner) or by a small team of individuals capable of scheduling their activities so that they do not interfere with each other.

In X-Cart PRO, the back-end is divided into two zones with separate access: *Admin area* and *Provider area*

. Store administration and management staff members are given access to this or that zone of the back-end based on the type of responsibilities they perform. Accessible features vary depending on the access level of the users: some users can access all the features and make modifications that affect the entire store (like 'admin' account users or the 'root' provider), while the others can only use a limited feature set and work on a specific part of the store (like individual 'provider' users controlling only a limited range of products).

Support for multiple access levels for back-end users makes X-Cart PRO a reliable basis for really large stores with multiple departments. From the inside, an X-Cart PRO-based store represents a complex environment which may be shared by an unlimited number of people or companies to sell products online. The vendors selling goods via such a store may be located apart from one another, sometimes in different countries. A separate 'provider' account allows each of such vendors to have their own product set, discounts, region specific settings for tax and shipping rates, etc. Control and management of the store in general is carried out by 'administrator' and 'root provider' accounts, so the store functions as a single whole. The principles of functioning of X-Cart PRO make it a great solution for joint businesses in which more than one individuals or organizations work in collaboration on the same e-commerce project.

## 1.2.4 X-Cart User Accounts

In X-Cart, each user is represented by a user account. An account is a record in the database that identifies a user and stores essential user information.

Each X-Cart user account belongs to one of the account types available in the system. In X-Cart GOLD, the two available account types are *customer* and *administrator/provider* (also known as *admin/provider*). In X-Cart PRO, the user account types are *customer*, *administrator* (also known as *admin*) and *provider*. Additional account types may be added by X-Cart add-on modules (for example, *partner* in X-Affiliate).

The type of user account defines the set of access privileges granted to a user:

*Customer account* is an account type that provides full-featured access to the Customer zone of an X-Cart-based store. Although store visitors are not required to have an account to be able to place orders, having an account is very convenient. For example, an account saves your customers the trouble of having to type in their personal information and billing/shipping addresses every time they order a product: all the necessary info is stored permanently in their *personal profile* and can be re-used when necessary. Besides, some store features (like orders history, wish lists / gift registry, special offer bonus points, returns) are available only to registered customers. Customer accounts can be created directly from the Customer zone. To create a customer account, a user needs to complete a 'Profile details' form (available by clicking the Register link in the Authentication box) and submit it.

*Administrator and provider accounts* are account types that provide access to the Admin and Provider



areas of X-Cart PRO, respectively.

Type of task	Administrator account is used to:	Provider account is used to:
Setting up the store	<ul style="list-style-type: none"> <li>• adjust options affecting the store appearance and functionality</li> <li>• control the set of modules and add-ons used in the store</li> <li>• adjust the set of countries, states and counties with which the store can work</li> <li>• define methods by which the store will be able to deliver products to customers</li> <li>• define taxes that will be used in the store</li> <li>• define methods of payment that will be accepted by the store</li> </ul>	<ul style="list-style-type: none"> <li>• define destination zones (locations for which shipping and tax rates will be the same)</li> <li>• define which of the taxes created by the store admin need to be applied to products</li> <li>• define tax rates for specific destination zones</li> <li>• define shipping rates for specific shipping methods and destination zones</li> </ul>
Managing the product catalog	<ul style="list-style-type: none"> <li>• create and manage product categories</li> <li>• add products and update product information</li> <li>• define, which of the store products will appear on the storefront as featured</li> </ul>	<ul style="list-style-type: none"> <li>• add products and update product information</li> <li>• assign products to categories created by the store admin</li> </ul>
Operating the store	<ul style="list-style-type: none"> <li>• create user accounts of <i>administrator</i>, <i>provider</i> and <i>customer</i> types</li> <li>• manage user accounts/profiles</li> <li>• access accounts of other users to adjust their share of store settings or to perform actions on their behalf</li> <li>• create user memberships, assign memberships to users and control the set of features available to members of different membership groups</li> <li>• view customers' orders and change their statuses if necessary</li> <li>• view store statistics</li> <li>• import/export all types of X-Cart store data</li> <li>• generate a static HTML version of the product catalog (HTML catalog)</li> </ul>	<ul style="list-style-type: none"> <li>• set discounts that will be applied to orders exceeding specific amounts</li> <li>• view customers' orders</li> <li>• import/export some types of X-Cart store data (product information, destination zones, shipping/tax rates, orders)</li> </ul>
Customizing the	<ul style="list-style-type: none"> <li>• edit X-Cart templates</li> </ul>	

Type of task	Administrator account is used to:	Provider account is used to:
store's look&feel	<ul style="list-style-type: none"> <li>• edit the text of X-Cart interface</li> <li>• translate the text of X-Cart interface into other languages</li> <li>• create additional pages to be used with the store</li> <li>• control X-Cart's Speed bar (a navigation bar with shortcuts to the most important sections of your store)</li> </ul>	
Maintaining the store	<ul style="list-style-type: none"> <li>• view essential store information using the Summary page</li> <li>• use advanced X-Cart tools to optimize X-Cart database tables, check database integrity, clear statistics, clear templates cache, remove unwanted data, etc</li> <li>• verify the integrity of X-Cart files using system fingerprints</li> <li>• view and manage X-Cart logs</li> <li>• upload files to a directory on your store's server using X-Cart's file manager</li> <li>• define the location of the image repository (database or file system)</li> <li>• backup / restore the database</li> <li>• upgrade X-Cart / apply patches</li> </ul>	<ul style="list-style-type: none"> <li>• view essential store information using the Summary page</li> <li>• upload files to a directory on your store's server using X-Cart's file manager</li> </ul>

In X-Cart GOLD, the store back-end is a single environment in which there is no subdivision into Admin and Provider zones. Accordingly, the administrator and provider accounts are combined into one: *administrator/provider account*.

Administrator, provider and administrator/provider accounts cannot be created by simple profile registration, like customer accounts. Accounts of these types are all created by administrator users via the 'Users Management' section of the store back-end.

Every X-Cart-based store provides several *default user accounts* - working user accounts which you can use to access the respective X-Cart user interfaces after your store is installed.

X-Cart GOLD	X-Cart PRO
<b>Administrator/provider account</b> Interface URL: <i>http://www.example.com/xcart/admin/</i> Username: <b>master</b> Password: <b>master</b>	<b>Administrator account</b> Interface URL: <i>http://www.example.com/xcart/admin/</i> Username: <b>admin</b> Password: <b>admin</b>  <b>Provider account</b> Interface URL: <i>http://www.example.com/xcart/provider/</i> Username: <b>provider</b> Password: <b>provider</b>  <b>'Root' provider account</b> Interface URL: <i>http://www.example.com/xcart/provider/</i> Username: <b>root</b> Password: <b>root</b>

After installation, please log in to each of the default user accounts and change the username/password information.

Please be aware that any administrator or administrator/provider account can be used to create accounts of any type.

## 1.3 X-Cart Key Features

This section provides an overview of X-Cart's most important features in the following areas:

[Setup and Support](#)

[Configuration](#)

[Storefront](#)

[Merchandising and Inventory](#)

[Search Engine Optimization](#)

[Customer Service](#)

[Administration](#)

[Sales Analysis and Tracking](#)

The features described in this section apply equally to both X-Cart GOLD and X-Cart PRO.

In addition to the feature set provided by X-Cart GOLD, X-Cart PRO offers some advanced features:

- Separate access to the back-end for admin and provider account users;
- Unlimited number of isolated provider accounts;
- A separate product set for each of the providers (the products of different providers are joined into a

single catalog, but each of the providers can manipulate only his or her own products);

- Support for vendor-specific shipping and tax settings.

**Note:** Although the functionality range provided by X-Cart will satisfy the needs of most X-Cart users in most business situations, it is possible to order [custom development services](#) from X-Cart development team to tailor the store functionality according to your specific needs.

## 1.3.1 Setup and Support

### Setup

- **No programming required**

One does not need PHP programming knowledge to be able to use a store based on X-Cart. X-Cart provides so many features and configuration settings that in most cases you can achieve the functionality you require without changing a single line of code. For example, you can turn certain blocks of X-Cart's functionality off and on by enabling and disabling X-Cart's built-in modules. You can also purchase some advanced add-on modules for your store to enable more complex functionality.

X-Cart's architecture allows you to easily change the look and feel of your store without editing the PHP code. X-Cart pages are based on HTML/Smarty templates, which are pretty easy to edit as long as you know at least some HTML and have a notion of Smarty. For those of our clients who will work with templates, we equipped X-Cart with a debugging console (a tool for viewing the template structure of a page) and a built-in template editor (an environment for viewing and editing the store templates).

In addition to these tools, we provided X-Cart with Webmaster mode - a mode that allows you to edit the text of your store interface in WYSIWYG mode directly on the store website.

- **A web-based installation wizard**

X-Cart software comes with an installation wizard that allows you to get your X-Cart store up and running in just a few minutes. The wizard guides you through the entire process of X-Cart installation, so you can simply follow the wizard's step-by-step instructions without fearing that you might overlook something important. X-Cart's installation wizard is web-based, which means that it runs in a web-browser window and can be used practically on any computer with Internet access irrespective of the operating system being used.

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

X-Cart features several pre-designed color schemes and page layouts that can be used in different combinations. You can experiment combining different color schemes and page layouts and find a solution that suits you best.

### Support

- **Limited free customer support**

Each full price license for X-Cart software comes with a limited amount of free technical support. The amount of technical support that you can get for free is expressed in the amount of support points that you get with your license. Support points are units that we use to measure the amount of work done by our support engineers to resolve a certain issue. Resolving different types of issues costs different amounts of support points. When our engineers solve a problem for you, an amount of support points corresponding to the type of issue resolved is taken away from your account. The remaining support points are stored on your account for future use. They do not expire through time. The amount of support points provided with an X-Cart license approximately corresponds to the amount of technical assistance needed by an average X-Cart client to successfully install and launch an X-Cart-based store. After the initial amount of support points that you get with your license is used up, you can purchase additional amounts of support points and, thus, continue using our technical support as a paid service. In any case, our highly qualified technical support team is at your disposal 24x7. Support is provided mainly through our web-based system called "the Help Desk". A phone line for emergency technical support is also available.

- **Free access to all future releases**

After you purchase an X-Cart license, you get access to a section in the Help Desk File area from which you can download a distribution of the latest version of X-Cart software available at the moment. As the development of X-Cart software continues, this section will provide download links to the new releases of X-Cart software as soon as they become available. As an existing X-Cart client, you will be able to download the latest available version of X-Cart at any moment and, if you wish, to install it instead of your current X-Cart store.

- **A built-in self-upgrade engine**

X-Cart has a built-in upgrade engine - a utility that allows you to upgrade your store to newer versions by applying upgrade packs to your existing X-Cart installation. Upgrade packs are developed by X-Cart team and supplied through the Help Desk. Each upgrade pack represents a set of patches describing the changes between the older and the newer X-Cart versions. Upgrading based on applying upgrade packs allows you to get a better and more functional store without having to re-install X-Cart from scratch. You keep your existing data and, possibly, even your store design and customizations. (Please note that the success of applying an upgrade pack by X-Cart's upgrade engine depends on how much your X-Cart has been customized).

- **Pre-configured settings**

X-Cart's installation wizard allows you to apply some pre-configured settings to your store. This includes some pre-configured taxes (GST/PST for Canada or VAT for Europe), destination zones, default company and customer addresses and phone numbers, and culture-specific values for some language variables (like "zip code"/"postal code"). Importing such pre-configured settings at the time of X-Cart

installation can help you configure your store faster.

## 1.3.2 Configuration

### Users/Orders Management

- **All orders stored in a MySQL database**

All information about orders, including customer order histories, is stored in the store's database. This allows you to easily manage your customers' orders. No matter how long ago an order was placed, you can find it in the database at any time. The order search form allows you find orders by the time period when they were placed and, if you wish, to adjust more search parameters (like order id, order creation date, order status, name of the customer who placed the order, product title contained in the order, etc). For any order stored in the database, you can view the order details, print out an invoice or update the order status.

- **Users and orders can be exported to CSV format**

X-Cart allows export of users and orders to CSV format. This means that user profiles and information about orders can be exported from an X-Cart store to a specially formatted plain text file where information is stored in a very simple format, with one record on each line, and each field within that record separated by a delimiter symbol (tab, comma or semicolon). CSV representation of user data provides a convenient way to transfer users from one store to another, which allows you to keep your user base when moving your store to another location. CSV representation of order data allows you to easily arrange information about your store's orders in such a way that it can be read by your accounting software.

- **Real-time order tracking**

X-Cart allows you to assign tracking numbers to orders. Orders that are shipped by UPS, USPS, FedEx or Australia Post services and have a tracking number assigned can be tracked in real time. To track an order shipped by these services, you will only need to click the 'Track it!' button on the details page of the respective order, and you will be redirected to the site of the respective postal service where all the necessary information can be obtained.

- **Express checkout**

X-Cart provides a user-friendly checkout procedure that allows your customers to complete their purchase in 3 simple steps:

Step 1: Customers specify their personal and contact information, billing and shipping addresses (Registered customers skip this step: they just log in to their customer account and use the information stored in their profile).

Step 2: Customers select a shipping and a payment method for their order.

Step 3: Customers provide information required to complete payment by the selected payment method.

- **Customizable e-mail notifications/invoices**

Order invoices that are issued by your store are based on templates and can be easily customized. E-mail notifications that are sent to store users are also template-based and can be changed.

- **Different prices, discounts, payment methods, taxes, etc for customers of different membership levels**

X-Cart allows you to grant memberships to your customers. It is possible to set up your store in such a way that customers of different memberships will be able to purchase the same products at different prices, to get different discounts, etc. It is also possible to limit access of customers to certain categories, products, payment methods, etc by membership. The number of customer memberships that can be defined is unlimited, and you can name them whatever you like (for example, "Premium", "Wholesale", "VIP", etc).

- **Printable invoices**

It is possible to print invoices for selected orders.

- **Printable shipping labels**

It is possible to print shipping labels for selected orders.

- **Orders can be exported to QuickBooks format**

If you use QuickBooks as your accounting software, you may be interested to know that X-Cart supports export of data to QuickBooks format. The process is as simple as clicking a button.

## Products Management

- **Unlimited product options/variants**

For products that come in different variations (like t-shirts that come in different colors, sizes or materials, or books that come in hard or soft cover), it is possible to define product options.

X-Cart supports product options of three types - price modifier, product variant and custom text field. Options of the price modifier type allow you to establish the prices of product variations relatively to the base price of the product. Options of the product variant type allow you to establish the prices of product variations independently of the base price and allow you to track the quantity of different product variations in stock. Options of the custom text field type do not affect the product price, but provide a custom input field that your customers can use to describe the desired characteristics of the product.

X-Cart allows you to define an unlimited number of options of any type for as many products as you like.

- **Unlimited custom input fields for products**

If certain information that you would like to provide about your products does not fit into the standard fields of X-Cart's 'Product details' form, you can add some custom, non-standard fields to this form

and use them to publish this information. The number of custom fields that you are allowed to add is unlimited. Please note that X-Cart will be able to use these fields in product search.

- **Customer-defined prices (free prices)**

X-Cart allows you to have free prices for selected products. The term "free price" means that the price of a product is defined by the customer who purchases this product. When a product is sold at a free price, an empty input field is provided on its product details page in the Customer zone instead of the price defined by the product provider. A customer can use this field to enter any price that he or she thinks appropriate. The product is added to the customer's shopping cart with the price specified by the customer. The order is placed as usual. The product provider reviews the order, and if he or she finds the price offered by the customer adequate, the store administrator processes the order. All you need to do to allow your customers to purchase a certain product at a free price is use the 'Product details' page in the back-end of your store to set the product's price to 0 (zero).

- **HTML-enriched product descriptions**

It is possible to use HTML tags in product descriptions.

- **Unlimited number of detailed product images**

X-Cart allows you to add detailed images for your products. The number of detailed images that can be added for a product is unlimited. It is possible to add detailed images to products one by one, or to import images for all your products at once.

- **Ability to store images in the database or on the file system**

Images used in your store can be stored either in the database or on the file system. By default, all images are stored in the database. If your database performance is poor or your database size is limited, you may prefer to move some or all of your store's images to the file system.

- **Multi-homed products**

In an X-Cart-based store, products exist in categories. Each product belongs to at least one category. If you wish to place a certain product in more than one category, you can specify additional categories for it. Any product can be displayed in as many categories as you like.

- **Information about manufacturers**

Many customers prefer shopping by brand/manufacturer. X-Cart allows you to specify a manufacturer for each of your products. When the products in your store have defined manufacturers, a menu is provided in the Customer zone that allows your customers to view products sorted by manufacturers.

- **Product thumbnails**

X-Cart allows you to add thumbnail images for your products. The recommended size for thumbnail images is from 50x50 px to 150x150 px.

- **Import/export of products**

X-Cart allows you to export product data from your store database to a CSV file and to import



CSV-formatted product data from an external file into your store database. This feature allows you to work with large amounts of product data more effectively. Here's how: CSV format is compatible with MS Excel and a number of other spreadsheet editors. You can export information about some or all of your products from the store database to a CSV file and then import the CSV file into your favorite spreadsheet editor program. In this program, the information exported from your store will be presented in the form of a table. You will be able to quickly edit the information contained in the table, save the results to CSV format and then re-import the resulting file into your store. This way, updating of your product information will take a lot less time than it would if you used the standard method of editing each product through X-Cart's web interface. In addition to making the procedure of updating product data faster and easier, X-Cart's ability to export/import data in CSV format has a number of other usages. For example, it can be used to add new products to the store database or to transfer your existing products from one store to another.

- **Export of products to Froogle/GoogleBase format**

Froogle is an extension of Google search engine dedicated to helping shoppers quickly find products for sale on the Web. X-Cart provides a module that allows you to list your products in Froogle by submitting product information to GoogleBase directly from your store. The module pulls data from all the products in your store database, creates a properly formatted product feed file and uses FTP to submit this file to Google Base. Google Base then places the submitted product information in Froogle. With X-Cart's Froogle/GoogleBase module, submitting product information to Froogle is very easy, so you can perform it often enough to ensure freshness and accuracy of information about your products in Froogle listings.

## **Store Configuration (Shipping and Tax, Modules, Countries & etc.)**

- **Real-time USPS, FedEx and UPS shipping calculation**

For a customer wishing to place an order, the cost at which the order will be shipped bears significant importance. Stores that ship orders using USPS, FedEx or UPS can be adjusted to receive realtime shipping rates from the respective postal services and calculate an estimated cost of shipping of the order by the selected service before the order is placed. Shipping rates from UPS, USPS and FedEx can be received through InterShipper service or directly from the respective postal services. To use real-time shipping calculation at your store, you will need an account with each service that you will use for shipping orders to customers or with InterShipper.

- **Unlimited number of shipping methods**

X-Cart allows you to define an unlimited number of shipping methods for your store.

- **Flat rate, weight, order total and per-item based shipping**

X-Cart provides you with a flexible mechanism to define your custom shipping rules. You can combine

real-time shipping calculations with manually defined shipping rules, do your own shipping markups over carriers' estimate, etc.

X-Cart allows you to state the shipping rates for each shipping method defined for your store. You can define the flat shipping charge, Charge as % of the Total Amount Ordered, Flat Shipping Charge Per Item Ordered, Flat Shipping Charge Based on Product Weight or their combination.

- **Different weight limits for different shipping methods**

It is possible to define a weight limit (maximum weight that can be shipped) for each of the shipping methods used by your store.

- **Markups for real-time shipping**

X-Cart allows you to define markups (extra charge, percentage surcharge) for real-time calculated shipping methods. This can be useful when your shipping expenses exceed the value returned by the real-time shipping calculation service (For example, this may be the case if you have to pay an extra fee for packing, insurance, etc). The markups you define are added to the values returned by the real-time shipping calculation services.

- **"Free shipping" option**

With X-Cart, you can offer your customers free shipping for selected products.

- **Ability to define handling/freight charges**

If you have any special expenses associated with the packaging or shipping of certain products, you can define a shipping freight (additional handling charge) for each of such products to cover these expenses.

- **Ability to restrict shipping by location**

If your store sells a product that you do not wish to sell to customers from a certain location (like state or country), you can restrict customers from this location from ordering this product.

- **Ability to sell downloadable goods (e-goods)**

X-Cart can be used to sell electronically distributed products such as books, films, legal documents, etc. A customer who purchases a downloadable product is provided with a link that allows him or her to download the product to his or her computer. The link is valid for a limited period of time.

- **Customizable tax calculation**

X-Cart is extremely flexible in the part where you set up taxes and tax rates. It allows you define virtually any tax and tax rate by providing a formula according to which they can be calculated.

- **Product-specific taxes**

X-Cart allows you to set up an unlimited number of taxes and to specify, which of these taxes should be applied to each specific product.

- **Taxes & shipping costs depending on the client's location**

X-Cart can calculate tax and shipping costs based on the customer's location. Technically, it is done as

follows: You divide the territory to which you are going to sell and ship products into several destination zones (A destination zone is a unity consisting of territories for which shipping and tax rates are the same). Then, you define taxes, tax rates, shipping methods and shipping rates for each of the defined destination zones. When a customer places an order, X-Cart uses the address that he or she provides on checkout to define the destination zone from which this customer originates. Based on the shipping and tax rates defined for this destination zone, X-Cart calculates the cost of shipping and tax that should be applied to the order.

- **Support for non-taxable products**

X-Cart allows you to have non-taxable products at your store along with taxable products.

## Payment System Configuration

- **Payments can be accepted in any currency**

With X-Cart software, you can specify a currency in which you will accept payments. All prices in your store will be displayed in that currency.

- **Real-time credit card processing**

X-Cart supports more than 100 credit card payment gateways, e-check and payment systems. Multi-gateway support gives you the ability to switch easily from one payment gateway to another in case you are not satisfied with the service. For a full list of payment gateways and systems supported by X-Cart, refer to the page [http://www.x-cart.com/xcart\\_payment\\_gateways.html](http://www.x-cart.com/xcart_payment_gateways.html) on X-Cart website.

- **Manual (offline) credit card processing**

X-Cart allows you to perform manual (offline) processing of credit card payments. Manual CC processing presupposes that credit card details are provided by customers not to a payment gateway, but to the store itself. The store admin uses the credit card information provided by a customer to process the customer's order. After a payment is verified, the store admin manually changes the status of the respective order to 'Processed'.

Note that X-Cart allows you to define the types of credit cards that you wish to accept at your store.

- **A predefined set of offline payment methods: checks, purchase orders, phone orders, wire transfer etc**

In addition to offline processing of credit cards, X-Cart provides a number of other payment methods that can be processed offline:

- Phone Ordering
- Fax Ordering
- Money Order (US Banks Only)
- Cashiers Check or Cash Only
- Personal Check (US Funds only)

- Business Check (Drawn on US Bank and in US Dollars)
- Wire Transfer (Our bank account details you can find in help section)
- Government Check (US Funds Only)
- Traveler's Check (US Funds Only)

## Security

### ▪ Complete HTTPS/SSL support

X-Cart supports SSL technology to ensure that the online store on the server and the browser on the client's machine can communicate in a secure way. When a customer visits store pages where sensitive information is entered or displayed, X-Cart automatically switches to HTTPS/SSL protocol. When this protocol is used, sensitive data is transmitted between the online store and the client's machine in encrypted form.

### ▪ Secure HTTPS/SSL administrative access

You can adjust the authorization pages of the Admin, Customer and Provider (X-Cart PRO) zones of your store to provide links to separate pages from which the users of your store will be able to log in to the respective zones via HTTPS. Also you can enable your customers to stay in HTTPS all the time.

### ▪ Password-protected administrative access

Access to the back-end of your X-Cart store is password protected. There is also an intrusion detection system that notifies the store administrator if someone's attempt to log in to the store fails.

### ▪ Encrypted customer data

Sensitive customer information contained in the order details is encrypted using the Blowfish encryption algorithm.

### ▪ PGP-encrypted e-mail notifications

X-Cart can be used with a PGP encryption program to ensure security of notification emails that are sent to the orders department. PGP uses public key encryption, a system that provides with privacy and authentication both the sender and the recipient of the message.

**Note:** PGP version 6.0 or above is required.

### ▪ Real-time security notifications about all failed login attempts

X-Cart allows you to receive real-time security notifications about all failed login attempts.

### ▪ Fraud screening

X-Cart's Antifraud Service module helps you to minimize the risk of fraudulent payments made at your store. It enables your store to use a fraud screening service provided by our company on a subscription basis. This service screens all new orders placed at your store. As a result of screening, a numeric value called the "Fraud risk factor" is calculated for each order. If this value exceeds a certain threshold, a

note is placed in the order details with an explanation of what is suspicious about the order. The order itself gets suspended so you can review its details and decide whether you wish to process it or not.

- **Ability for the store administrator to disable usage of the store from specific IPs**

X-Cart's Stop List module helps you to protect your store from internet fraud. It allows you to forbid access to checkout from certain IP addresses.

- **Backups**

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.

### 1.3.3 Storefront

#### Design and Layout

- **100% template-based storefront**

X-Cart design is 100% template-based. All the templates are grouped into folders. The templates are very easy to edit using any text editor you would use for HTML. There is also a built-in Template editor in X-Cart that allows you to customize templates without even leaving the store.

- **W3C XHTML 1.0 compliance**

X-Cart has undergone a comprehensive template overhaul and is now fully compliant with the XHTML 1.0 Transitional W3C standard.

- **Fully customizable design & layout**

X-Cart is software with open source code. Its template-based structure and optimized programming code enable you to customize your online store, making it exactly what you want it to be.

- **Intuitive navigation**

X-Cart's navigation system is intuitive, convenient and easy to use, which allows you and your customers to access the desired information in almost no time at all.

- **A built-in template editor: preview, edit and restore templates**

X-Cart has a built-in template editor that allows you to edit and preview the templates from which your store is built. Using this editor you can change the look and feel of your store in whatever way you like.

- **WYSIWYG text editor (Webmaster mode)**

All text elements that appear in X-Cart's user interface (option field names, notes and messages) are stored in language variables. The way text elements are stored in X-Cart allows you to edit them without having to edit X-Cart's PHP code or templates. Editing of selected language variable values can be done through X-Cart's "Languages" section; however, editing through the "Languages" section is not

convenient enough if you want to edit not just a couple of phrases, but most or all of the text that appears in your store. X-Cart provides an elegant solution for this problem - Webmaster mode. It is a mode that allows you to edit the text elements of X-Cart's user interface in WYSIWYG. In this mode, you simply click the word or phrase that you wish to edit and it appears in a small pop-up window where you can edit it. After you finish editing the selected word or phrase and save the changes, they become available for viewing immediately.

- **CSS-compatible design**

X-Cart supports CSS (Cascading Style Sheets). All X-Cart's styles are stored in one configuration file used by X-Cart's template engine. You can modify this file and change the colors and other properties affecting the look of your store.

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

X-Cart's Debugging console is a tool that you can use to find out the template structure of any page in your store. It may be useful when you edit the look and feel of certain pages and need to know which templates need to be edited. When enabled, the Debugging console appears in the form of a pop-up window displaying the tree of templates of the current page. As you move from one page to another, the information in the Debugging console window is refreshed to show the template structure of the page being displayed.

- **Support for static HTML pages**

If necessary, you can create your own HTML pages and add them to your X-Cart-based store. Two types of pages are supported: root level pages and embedded pages.

Root level pages are fully independent HTML files. They exist in X-Cart root (the directory where your X-Cart store is installed), hence the name.

Embedded pages are pages that are placed inside standard X-Cart pages. Their look depends on the design of your store in general, as you create only the page content (no <HTML>, <HEAD> or <BODY> tags are used). The content of embedded pages is displayed in your store's Information column (corresponds to the widest column in any X-Cart's standard template scheme). Links to embedded pages appear in the Help menu box.

X-Cart provides a section that allows you to create and manage pages of both these types.

- **Customizable heading tabs**

You can configure a set of shortcuts to the most important pages of your store to be displayed at the top of your store's customer front-end. Such shortcuts can simplify site navigation for the visitors of your store.

- **HTML emails**

Email notifications and newlist messages can be sent by X-Cart as plain text or as HTML mail. You can use X-Cart's built-in template editor to create professionally looking HTML emails.

- **Advanced (WYSIWYG) editor for multi-line text input fields**

An advanced (WYSIWYG) editor is provided for product/category/manufacturer descriptions, language variables, static pages, Webmaster mode.

- **Right-to-left direction for displaying text**

X-Cart supports right-to-left direction for displaying text (may be useful for languages like Hebrew or Arabic).

## Product Catalog

- **Unlimited number of products, categories and unlimited category nesting**

The number of products and categories that can be created in an X-Cart-based store is not limited. There is also no limitation on category nesting. However, the number of categories and products affects the performance of your store. X-Cart is optimized for smooth performance with up to 20 000 products. You should be aware that the actual number of categories and products that you will be able to have will depend on the performance of your server. The more products you wish to have, the better and more powerful server you will need to hire.

- **Members-only categories**

If necessary, you can limit access of customers to some categories in your store by customer membership. Any category can be made members-only (visible only to the customers with a certain membership). Ordinary customers will not be able to see such a category on the storefront, nor to find/view/order products from it.

- **"Featured Products" highlight**

X-Cart provides a way to bring your customers' attention to featured items and seasonal products in your store by putting information about them on display in the Featured products box displayed at the top of the page. You can control which products are displayed in the Featured products box, as well as in which order they are displayed. It is possible to adjust the contents of the Featured products box for the Customer zone main page and for each of your product categories.

- **Automated display of bestsellers**

X-Cart provides you with the ability to inform your customers what products in your store sell best. X-Cart's Bestsellers module can automatically generate a list of your store's best selling products in a special Bestsellers box on the store-front. Products enter this list based on the results of sales analysis. While there have been no sales (right after the store has been launched), the contents of the Bestsellers list is formed of the products that get the most views.

- **Related products, up-selling and cross-selling products**

You can multiply your profits by using X-Cart's module "Upselling products". This module enables up-selling and cross-selling by allowing you to provide links between different products at your store so

that customers who are about to buy a certain product are offered additional products that go well with it. Upsold products are displayed in a "Related products" section on the Product details page of the product to which they are related.

- **Advanced product search**

In addition to the simple "Search" input field, X-Cart provides your customers with a link to an advanced search form. This form allows your customers to fine-tune product search by specifying exact search parameters. Your customers can perform searches by a fragment of the product title or description, by SKU, by the contents of the product's custom extra field, by category, by manufacturer and by price/weight range (The named search parameters can be used independently or in combination).

- **Product sorting by manufacturers**

If you specify a manufacturer/brand name for each of your products, your products will be automatically sorted by manufacturer/brand name in X-Cart's Manufacturers menu. This menu will let your customers access the items produced by a certain manufacturer more easily.

- **Sorting of products by SKU, Product title, Price**

The contents of the products list can be sorted by SKU, product title and price. A customer only needs to click the appropriate sorting link at the top of the products list area so the products are rotated and displayed in the necessary order (for example, clicking the Price link results in that the products in the list are displayed according to the decrease of their prices). Clicking the same link once again reverses the order of the products in the list. The original sorting order can be restored at any moment by clicking on the Default sorting link.

- **A more user-friendly and intuitive checkout procedure (Fast Lane Checkout module)**

Fast Lane Checkout module provides a more user-friendly and intuitive checkout procedure in X-Cart.

- **X-Magnifier add-on module**

X-Magnifier add-on module that you can purchase for your X-Cart store provides a Flash-based viewer that allows the visitors of your store to view large, high-resolution images (GIFs, JPEGs and PNGs up to 2000 px size) in much detail and, possibly, even to save some time and traffic while doing so. While viewing an image, your store visitors can freely zoom in and out on any area of an image, as well as drag the image around in the viewer work area to examine every detail of the item displayed. No quality loss occurs during magnification, so your customers are provided the ultimate viewing experience at any level of image magnification.

## 1.3.4 Merchandising and Inventory

- **Discount coupons codes**

You can enable discount coupon codes at your store. A discount coupon code is a secret code that a customer can enter into an appropriate form on checkout to get a discount. You can create as many



different discount coupon codes for your customers as you like. For each discount coupon you can define the amount of discount (can be expressed as an absolute or percentage value or as free shipping on the entire order), the number of times that the coupon code can be used, the coupon code expiration date and the requirements that a customer's order must meet for the customer to be allowed to use the coupon code (e.g. "The order subtotal must equal or exceed <amount>" or "The cart must contain <product>", or "The cart must contain products from the category <category>").

#### ▪ **Gift certificates**

X-Cart has support for gift certificates: you can sell gift certificates to your customers and accept them as a payment method. Any order containing products can be paid for by a gift certificate (fully - if the balance on the gift certificate equals or exceeds the order total, or partially - if the balance on the gift certificate is smaller than the order total). Orders containing just gift certificates (no products) cannot be paid for by a gift certificate.

Gift certificates can be printed for sending by regular mail. Two pre-designed sample templates are provided for printable gift certificates. It is possible to enable your customers to choose a design for the gift certificate cards that will be sent by postal mail.

#### ▪ **Full inventory control**

X-Cart provides you full control over the store inventory:

- At the time of creating a product, you specify how many items of this product you have for sale. This is the product's "quantity in stock". As customers begin to order items of this product, X-Cart tracks how the product's quantity in stock decreases. At any moment you can find out how many items of the product remain in stock just by looking at the product's Product details page.

- If you wish, you can also specify a "low limit" for each of your products. A "low limit" is a quantity of product items in stock on reaching which X-Cart sends a notification to a designated email address. A notification about the quantity of a certain product having reached the "low limit" serves as a reminder for the product provider to re-stock the product before it is sold out.

#### ▪ **"Out of Stock" Messages**

Once a product's quantity in stock reaches 0 (zero), X-Cart forbids addition of this product to cart. Depending on your choice, it can leave the out-of-stock product on the storefront with an "Out of stock" message or remove it from the storefront completely.

#### ▪ **Purchase discounts**

You can enable purchase discounts at your store. In X-Cart, a purchase discount is a discount that is automatically applied to a customer's order when the order subtotal exceeds a certain amount. You can define as many purchase discounts as you like. For each purchase discount, you will be able to adjust the order subtotal amount on which it should be given and the amount of discount expressed as an absolute or percentage value. If you wish, you can set up your purchase discounts in such a way that they will be applied depending on the customer's membership.

- **Retail and wholesale price**

You can define retail and wholesale prices for products. Wholesale prices can be adjusted to depend on the quantity of product items being ordered and/or the membership of the customer who orders them.

- **Ability to limit the minimum ordering quantity**

You can set a minimum ordering quantity for each of your products and thus prevent your customers from placing orders that are too small and inconvenient to handle.

- **Ability to disable inventory tracking**

As long as your store uses inventory tracking functionality, it will prevent customers from adding products whose quantity in stock has reached zero to the shopping cart. If you do not want this to happen (which may be the case if the quantity available for sale is unlimited for all the products that you sell), you can disable inventory tracking for your store.

### 1.3.5 Search Engine Optimization

- **Pages can be indexed by all major search engines**

To promote your store, you will probably want to have it listed with popular search engines like Google, Yahoo, MSN, etc. In designing X-Cart, we did our best to optimize it for search engines. The structure and content of X-Cart pages are designed in accordance with the major search engine requirements. This should help you get more traffic and more targeted customers from search engines. X-Cart's HTML catalog feature can help you make your store even more search engine friendly.

- **Customizable META tags for each catalog page**

X-Cart allows you to control META tags that are included into every page of your store's front-end. In addition to defining META description and META keywords for the website in general, you can choose to define META description and META keywords for each category in your store and include them into your website's META tags. Using tags relevant to the page content can significantly improve the page's rating with search engines.

**Note:** META tags for separate products are generated automatically using product name and description and cannot be defined.

- **Customer referrer info is stored in the database**

The profile of each registered customer stores information about the customer's referer - URL from which the customer came to the store before he or she registered a customer account.

- **HTML product catalog**

Today, static HTML pages tend to gain better rankings with modern search engines than pages generated dynamically. X-Cart provides dynamic interactive experience to its users by generating web pages whose content can change in response to different contexts and conditions. In this sense, the web

pages generated by X-Cart are dynamic. From the viewpoint of search engine friendliness, that is a disadvantage. To overcome this disadvantage, X-Cart provides a feature that can improve the standing of your product catalog pages with search engines - HTML catalog. HTML catalog is a static version of the storefront. It exists simultaneously with the dynamic version. Shoppers are referred to the static HTML catalog of your store through search engines. They remain in the static part as long as they browse through the products and categories, but as soon as they attempt to add a product to the shopping cart, to do a search or to perform any other operation that involves usage of the database, they are redirected to the dynamic part of the store.

It is possible to generate a separate HTML catalog for every language supported by your store.

- **SEO options group**

X-Cart provides a group of options for search engine optimization of your store website. Using these options, it is possible to define a general META description and keywords for your store website, to define META descriptions and keywords for your products and categories and to include them into your website's META tags, to define the page title format and length, etc.

## 1.3.6 Customer Service

### Customer care

- **Customers can search & browse their order history**

Registered customers can use X-Cart's 'Orders history' section to access information about any order they have ever placed at your store. Using this section, a customer can search for a specific order, view its status and details, print out the order invoice, etc. Orders can be searched for by date of creation, by order id or by order status. The information in the 'Orders history' section is updated in real time, so the customer can get the most up-to-date information about any order whenever needed.

- **Customer can choose between account registration and express checkout**

A visitor of an X-Cart-based store does not have to be a registered customer to be able to make a purchase. X-Cart allows shoppers to check out anonymously (without logging in to a customer account). The checkout procedure is the same for registered and anonymous customers - with the exception that, when checkout is initiated by an anonymous customer, X-Cart's checkout procedure includes an extra step at which the customer's contact information and shipping/billing addresses are collected. The checkout procedure for registered customers does not have this step, because they have their contact information and addresses stored in their customer profiles and can re-use them simply by logging in. In addition to not having to re-enter their contact and billing/shipping info every time on checkout, owners of registered customer accounts have a number of other advantages: for example, they can create wish lists, view their order histories, etc. Depending on the desired functionality, your customers can choose to set up a customer account or to work anonymously.

- **Forgotten password reminder**

If a registered customer forgets the password for logging in to their customer account, they can re-request their account access information to be sent to the e-mail address that was used for the registration of their customer account.

- **Wish list**

Registered customers can create wish lists. A wish list is a place where a customer can add titles of the products that he or she wants. Wish lists are stored in the database similarly to registered customers' shopping carts and may serve as a reminder for their owner to buy certain products or can be shared by the owner with his or her friends or family members in order to give them some gift ideas for a coming event (birthday, wedding, etc).

- **"Send to friend" button**

Upon your wish, the Product details page of your products may contain a button that your customers will be able to use to mail the complete information about the product to a friend's email address.

- **Customer's cart is saved till the customer's next visit**

After a registered customer leaves the store / logs out, his or her shopping cart is stored in the database. Next time that this customer logs in, he or she finds the cart contents in the same state as it was on the previous visit. This feature makes X-Cart very convenient for customers who need time to decide whether they really want the products that they added to the shopping cart or not: a customer can add something to the cart, leave the store, think the purchase over and then return to the cart and complete the purchase without having to search for the previously selected product items again. This feature is also great for repeat orders: customers who regularly order the same product set do not have to search for the necessary product items every time they want to make an order.

- **"Printable version" button**

In the Customer zone of your X-Cart-based store, all pages of the catalog (including category pages, product list pages and product details pages) have a printable version. Customers can access the printable version of a page by clicking the button "Printable version" displayed on the page.

- **Memberships and special pricing**

You can allow customers of different memberships to purchase products at different prices. The prices can be adjusted to depend on the quantity of items being ordered and on the membership level of the customer who orders them.

- **"Clear cart" button**

A customer can remove all the products items that have been added to the shopping cart with a single click.

- **Ability to edit product options in cart/wishlist**

Customers can easily edit the options of product items in their shopping cart or wishlist.

### ▪ **Printable invoices**

Customers can print their order invoices. The "Print invoice" link displayed at the top of each page that shows an invoice provides a printable version of the invoice. Invoices can be printed not just for orders that have just been placed, but for any order from the customer's order history.

### ▪ **Advanced contact form**

The Customer zone of an X-Cart-based store provides a form that allows customers to contact the store's Help/Support department - "Contact us" form. You can configure the set of fields that should be included into this form and specify, which of these fields should be active (available for completion by customers), and which - required (mandatory for completion by customers). If the field set for the "Contact us" form provided by X-Cart does not exactly meet your needs, it is possible to add your own (custom) fields to this form.

### ▪ **Newsletter management: multiple news lists, import/export of subscribers, news archive for customers**

X-Cart allows you inform your customers about things happening at your store (store site news, new arrivals, items on sale, special offers, etc):

- You can publish news in the "News" section of the store website. The latest news will be displayed to the website visitors in the "News" box, while the news published some time ago will be available via the link 'Previous news' as a news archive.

- You can allow website visitors to subscribe to your newsletter, so news will be sent directly to their email addresses. Within your newsletter, you will be able to set up several news categories - news lists - and allow visitors to subscribe not to the entire newsletter, but just to the news lists in which they are interested. Store visitors will be able to subscribe to any of your active news lists, no matter whether they are registered customers or not. For each of your news lists, you will have a mailing list - a list of email addresses of the news list subscribers. You will have full control of your mailing lists, including that you will be able to add individual addresses to a mailing list, remove individual addresses from a mailing list, or export selected addresses from a mailing list to a CSV-formatted file. To import addresses into a mailing list use a text file, the format of which should be the following:

```
email1@example.com  
email2@example.com  
email3@example.com.
```

## **Customer accommodation**

### ▪ **All customer's data is stored in the database**

In an X-Cart-based store, every registered customer has a personal profile that stores his or her name, contact information, address, membership, etc. The profile is stored in the database and allows the

customer to reuse the information stored in it. In addition to the customer's personal profile, the store database stores information associated with it - contents of the customer's shopping cart, the customer's wish list, etc.

- **Greet regular visitors**

You can enable a module that will greet your customers by the name when they return to your store website.

- **Registered customers can be offered discounts**

It is possible to provide discounts for your store's registered customers. All you need to do is set up a membership providing access to a discount and enable your registered customers to sign up for this membership.

- **Registered customers do not have to enter their data again**

When placing an order, a customer needs to provide information about him- or herself (name, title, phone number, email address, shipping/billing address, etc). To avoid the necessity to enter this information every time, a customer may choose to become registered. After the customer becomes registered, he or she will be able to re-use the information stored in the profile simply by logging in. In addition to that, the customer will have some additional advantages: he or she will be able to modify the information stored in the profile, to track previously placed orders, to keep a wish list, etc.

- **Registered customers can edit their profile**

Registered customers can edit information in their personal profiles (password, personal information, billing/shipping addresses, contact information, desired membership, news lists to which they want to be subscribed, etc).

- **Mailing list support**

You can provide your store visitors with the ability to subscribe to your store's newsletter. To subscribe, a visitor will need to specify the news lists that he or she wishes to receive and to provide an email address at which he or she wishes to receive them. When the visitor subscribes to a news list, his or her e-mail address is added to the mailing list of that news list. After that, the visitor receives all the messages that you send within the news list until he or she chooses to discontinue the subscription. To discontinue receiving news messages, any of your store's newsletter subscribers will be able to remove their email address from the mailing list by visiting the 'Unsubscribe' link provided in each newsletter.

- **Moderated product reviews and ratings**

You can allow your customers to post feedback about the products at your store. Two types of customer feedback are supported: product ratings and customer reviews.

Product ratings are product evaluations based on a 5-point scale, the choice "Excellent" corresponding to the highest rating of five points, "Poor" - to the lowest rating of one point. Customers who wish to rate a product select the desired rating and submit their vote. The resultant product rating is calculated as a simple average of ratings given to the product by all the customers who have voted.

Customer reviews are product evaluations provided in textual form. Customers who wish to write a review of a certain product create a message and post it using a special form for reviews.

You can review, edit and delete ratings and reviews posted by customers to prevent abuse.

- **Registered customers can use the wishlist feature**

Registered customers can create a wishlist - a dream shopping list containing product items that the customer would like to buy in the future.

## 1.3.7 Administration

- **Web-based control panel**

Each store based on X-Cart has a zone that provides a web-based interface allowing the store administrator to control all the aspects of the store's functioning. In fact, this zone represents a control panel that the administrator can use to work on the store from any computer with Internet access and a web browser.

- **Password-protected administrative access**

Access to the admin zone of an X-Cart-based store is password protected, so you do not have to worry that someone would change your store settings without your knowing. There is also an intrusion detection system that will notify the store administrator if someone's attempt to log in to the store fails.

- **All changes are real-time**

When you change the configuration of your store, all the changes are applied in real time. You can experiment with your store settings and test various combinations of options until you find a solution that will suit your needs best. With X-Cart, you will be able to avoid a lot of expenses associated with implementing new features to your store because X-Cart already has the vast majority of features one might need to do e-commerce, and all you need to do to be able to use them is just to switch them on - at no additional cost.

- **Unlimited number of admin accounts**

X-Cart allows you to have a practically unlimited number of administrator accounts. An administrator account allows the user to watch over the whole store, control and configure it, manage accounts of other users (including admin accounts), process orders, etc.

- **Support for admin accounts with limited access**

X-Cart allows you to set up a desired number of admin accounts with limited access - "fulfillment staff accounts". A fulfillment staff account restricts access of the user to all the resources of the store's admin zone except orders and statistics.

- **User-defined date/time format**

You can easily set the date/time format that you would like to use at your store.

- **Ability to modify multiple products simultaneously**

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.

- **Ability to import/export all types of X-Cart store data**

X-Cart allows exporting of almost all types of data used by your store from the store database to an external file (or files) in CSV format (MS Excel compatible). It also supports importing of data from specially formatted CSV files to the database. In most cases, export and import come as two sides of one process, allowing you to first export data from your store and then to re-import it back into the store in original or modified form. You may find import and export useful for updating your store data (in the first place, for updating product information) or for transferring data from an old X-Cart store to a new one when upgrading your store or moving your store to a new location.

- **Ability to quickly enable/disable any product or category**

You can enable/disable any product or category by selecting an appropriate status for it.

- **Primary and alternative currency**

You will need to let your customers know in what currency they can pay you. For this purpose, you will need to define your store's primary currency. You will use this type of currency to set up product prices, shipping rates and all other monetary values at your store. Your customers will be supposed to pay you in this currency. In addition to the primary currency, you will be able to define an alternative currency and a conversion rate for converting prices and costs from the primary to the alternative currency. If you do, your store will be able to display prices and costs twice - first, in the primary currency, second, in the alternative currency. This way customers who are used to do calculations in the currency that you use as alternative will be able to estimate prices/costs without having to convert them from one currency to another.

- **Ability to temporarily close the storefront**

If you need to temporarily close your store for maintenance, you can do that at any time with just a couple of clicks. While the customer zone of your store is closed, the visitors trying to access the storefront are redirected onto a special page with a message that the store is temporarily inaccessible and may be visited at a later time. A sample of the "Shop closed" page is furnished with every X-Cart distribution package and is used by default for closing the storefront in all stores based on X-Cart. If you wish, you may choose to design your own HTML page for this purpose.

While the customer zone of your store is closed, you can access it using a secret code ("key").

- **Default customer address**

X-Cart allows you to set a default shipping address for anonymous customers. This address will allow customers who are not registered or not logged in to get an estimation of the tax and shipping costs for



their order based on the default shipping address and the shipping method they have selected.

### 1.3.8 Sales Analysis and Tracking

- **Order statistics**

X-Cart provides statistics on orders placed at your store recently. At any moment you can find out how many orders with a specific status (Processed, Failed/Declined, Not finished, Queued) you had "today", "this week", "this month" or "since your previous log-in".

- **Number of customers**

At any moment you can find out the total number of your store's registered customers and the number of customers that got registered during a certain period.

- **Product views**

It is possible to specify a time period and find out what products in your store's catalog were viewed by customers during this period and how many times each of these products was viewed.

- **Category views**

It is possible to specify a time period and find out what categories in your store's catalog were viewed by customers during this period and how many times each of these categories was viewed.

- **Products removed from cart by customers**

X-Cart allows you to find out how many times any of the products that your customers added to the shopping cart was deleted from there during a certain period.

- **Most popular products and categories**

X-Cart allows you to find out the top 10 most popular products and categories at your store. (The most popular products are products that were purchased the most often for a certain period. The most popular categories are categories that got the most views for a certain period). The home page of your store's admin zone provides a table showing the most popular products and categories at your store for "today", "this week", "this month" or "since your previous log-in".

- **Total sales**

X-Cart allows you to find out your store's total sales amount for a certain period. The home page of your store's admin zone provides a table showing the gross total amount of all orders placed at your store for a certain period ("today", "this week", "this month" and "since your previous log-in") and the amount actually paid to you by the customers who placed these orders for the respective period. In addition to that, X-Cart allows you to do a search of orders for any period and find out the gross total amount of the found set of orders and the amount actually paid to you by the owners of these orders to date.

- **Client environment settings**

X-Cart allows you to get information about the environment that your customers use to access your

store (browser, platform, screen resolution, ability to use Java, JavaScript and cookies). This information can help you develop your store so that it looks good and performs well for the majority of your visitors.

- **Search patterns that your customers use when searching for products**

X-Cart gathers statistics on the search patterns that your customers use to find products at your store. At any moment you can find out what your customers searched for the most often for a certain period and, if necessary, include the words that were searched for by your customers into your product descriptions or product keywords so your customers can easily find what they are looking for.

## 1.4 What's New in X-Cart 4.1.x

This section provides a list of [new features introduced in X-Cart 4.1.0](#) and the results of [testing X-Cart 4.1.0 performance](#) as compared to X-Cart 4.0 and 3.5 branches.

### 1.4.1 X-Cart 4.1.x Features

Having analyzed the feedback from our users, we implemented all the most frequently requested features. Finally you have a chance to experience the many improvements introduced during the period of development:

- **XHTML 1.0 Transitional compliance**

X-Cart has undergone a comprehensive template overhaul and is now fully compliant with the XHTML 1.0 Transitional W3C standard.

- **Enhanced performance**

A considerable increase in performance has been achieved due to decrease of the number of complex SQL queries, addition of a data caching mechanism and optimization of the PHP code aimed at reducing the required memory limit.

- **Improved catalog structure**

Temporary X-Cart directories (like 'log', 'cache', 'templates\_c') have been moved to a new top level subdirectory 'var' (e.g. 'var/log', 'var/cache', 'var/templates\_c'). For a full list, see config.php.

- **Enhanced interface usability**

A 2-column layout has been introduced for the admin/provider area.

Several sections of the user interface have been redesigned for usability:

- 'General settings' section has been restructured (All the options have been sorted into distinct

groups; the 'Modules options' section has been divided so that each X-Cart module now has its own options page).

- 'Languages' section design has been optimized: input boxes for label values are enlarged for convenience, description field is removed, ability to search for labels in all topics is added.
- Shipping methods setup section has been redesigned.

In several sections ('General settings', 'Modules'), the mechanism of selecting option check boxes has been improved (Check boxes can now be selected and unselected by clicking not only the option check boxes themselves, but the option names as well).

An advanced WYSIWYG editor has been added for Webmaster mode, product/category/manufacturer descriptions, language variables and static pages.

A minor improvement has been made on the 'Profile details' page: the fields of the 'Shipping address' section are now hidden and completed automatically with information provided by the user in the 'Billing address' section; for cases in which the shipping address needs to be different, a check box 'Ship to a different address' is provided (enables a user to enter a shipping address manually).

Now X-Cart can remember registered customers for lengthy time periods. When remembered customers return to the store site, all the menu boxes appear to them as if they were already logged in; however, when they attempt to access such resources as their profile details, orders history or wish list, they are required to pass an authentication procedure. Customers are remembered and identified by a cookie stored onto their machine. The store administrator can set the time period for which such a cookie needs to be stored on a customer's machine by adjusting the `remember_user_days` variable in `init.php`.

#### ▪ **Enhanced flexibility and control**

A number of new configuration options have been added enhancing your ability to fine-tune X-Cart according to your needs:

(General settings->Appearance options)

- an option that allows you to choose a format for fractional numbers that will be used in the store (prices, weights);
- an option that allows you to control, whether product code (SKU) should be displayed in the Products list or not;
- an option that allows you to switch the section 'Send to friend', which can be displayed on the Product details page, on and off.

(General settings->General options)

- options that allow you to define a maximum subtotal amount with which an order can be accepted by your store and a maximum number of product items a customer is allowed to order at a time

(regardless of product titles);

- an option that allows you to control redirection of a customer to the dynamic or to the static part of the store after adding a product to cart from a static HTML catalog page with the option 'Redirect customer to cart' disabled;

Capability for the store admin to control the set of fields of the anonymous checkout registration form using the General settings->User profiles options page has been added. Shipping/billing title/firstname/lastname fields have been included into the set of fields whose status can be controlled using the General settings->User profiles options page.

#### ▪ **Advanced user management capabilities for the store administrator**

The store administrator now has the ability to temporarily disable accounts of other users:

- to suspend login for specific users;
- to forbid 'activity' for specific users (for provider accounts – to disable all the products of a specific provider, for partner accounts – to disable the addition of commission payments).

'Operate as this user' feature: The store administrator can now get access to the account of any other store user directly from the Admin zone interface and act on behalf of this user.

'Multi-login' feature: Simultaneous use of more than one user type in one browser session is now supported (for example, a user can be logged in as an administrator and a customer at the same time).

'Tax exemption' feature for customers:

- 'Tax number' field can now be enabled by the store admin in customer profile forms (A customer can use this field to provide his or her VAT number; the value of this field will be included into the order invoice, so the customer will be able to reclaim VAT).
- 'Tax exempt' status can now be assigned to certain customers by the store admin. Orders of such customers will not be subject to taxation.

#### ▪ **Improved membership system**

Access to products, categories, payment methods, tax rates and discounts can now be restricted based on memberships.

#### ▪ **Improved orders/order invoices**

Customer notes have been separated from the order details and are now shown on the customers' order invoice; they have also been made editable on the order details page by the admin.

#### ▪ **New capabilities for shipping rate calculation**

Support for Australia Post's Delivery Rate Calculator and USPS Domestic rate calculator API 2.0 has been added.

#### ▪ **Improvements in the system of payment acceptance**

Support for a number of new payment gateways has been added:

- ANZ eGate Merchant-Hosted payment module,
- PSiGate XML interface payment method,
- Heidel payment module (DirectDebit),
- Heidel payment module (CreditCard),
- a web-based payment module Bank of America,
- Bank of Asia payment module,
- TotalTrans payment module,
- Credomatic payment module,
- Secure-I payment module.

The store admin can now define a surcharge for any payment method.

#### ▪ **New import/export**

The procedure and file format for data export/import have been changed; export/import functionality is now available for almost all data types (products and all related information, categories, coupons, destination zones, users, etc).

#### ▪ **Advanced language management**

Multilanguage support has been added for:

- user titles (Mr, Mrs, ...),
- names of the months (Smarty tag htmlselect),
- membership levels,
- payment methods,
- X-Cart's speed bar.

The store admin can now choose right-to-left direction for displaying text (may be useful for languages like Hebrew or Arabic).

#### ▪ **Improved product search**

The store administrator/providers can now define search keywords for products – words or phrases which are not included into the product title or description, but are somehow associated with the product and can be used to find it.

The store administrator can enable/disable searching by individual words of a search phrase for all the store users (When this functionality is enabled, users searching for a product can specify, whether the results returned by the search need to match 'All words', 'Any word' or the 'Exact phrase' of the search pattern. If this option is disabled, search results include only the exact matches of the search pattern).

A special filter has been added for the product search facility that ensures that service and link words that occur in a search pattern are ignored when search by individual words is performed (available only for the English language).

#### ▪ **Improved logging**

X-Cart now has the ability to keep logs of errors and other information about the store functioning. The 'General settings->Logging options' section allows the store admin to select, which logs need to be kept.

The following logs are available:

- log of backups and database restorations;
- log of file operations performed via X-Cart interface;
- log of operations on orders (removal, editing, updating of statuses);
- log of operations on products (removal, editing, updating of statuses);
- log of transaction errors which may occur when payments are made via online payment gateways;
- log of realtime shipping modules' errors;
- log of PHP and SQL errors;
- log of changes in environment settings (php.ini and the active HTTPS bouncer).

▪ **A new image type – 'Product image'**

X-Cart 4.1 introduces a new image type - product images. Using this image type enables you to have an image of a product other than the product thumbnail displayed on the Product details page (If no product image is defined, the product thumbnail is used).

▪ **Enhanced control over images location**

When images are relocated from the database to the file system, paths relative to the directory xcart/ are saved, which facilitates moving the store to another hosting location.

Image files can now be moved to the file system during X-Cart installation.

▪ **Improved organization of data**

Optimized storage of images: a separate table is created in the database for each type of images.

The fields Shipping/billing title/firstname/lastname are added to the table xcart\_customers.

▪ **Means for maintaining data integrity**

X-Cart now has the ability to generate system fingerprints (lists of MD5 checksums of all the files in the directory xcart/ ) and to compare fingerprints generated at different periods of time to find out whether any files have been added, modified or lost (removed or renamed).

Security of compiled templates is improved: an MD5 checkup has been added for compiled templates (helps prevent unauthorized writing to the template cache). Now, if a compiled template gets altered, the checkup mechanism detects a change of the template's MD5 sum and forces re-compilation of the template.

▪ **Means for maintaining security of sensitive information**

In X-Cart 4.1, SALT encryption method has been fully replaced by Blowfish encryption algorithm. Blowfish is now used for credit card number and CVV2 fields. Blowfish key generation procedure is

added to the script install.php.

The store admin now has the ability to discard credit card information provided by customers saving only the last 4 digits of credit card numbers in order details (Admin area -> Tools page -> Credit card information removal section).

▪ **A new patch/upgrade center**

X-Cart 4.1 patch/upgrade functionality makes it possible to upgrade installed add-ons and non-standard X-Cart skins.

▪ **Two new modules added:**

'Fast Lane Checkout' module introduces a more user-friendly and intuitive checkout procedure.

'Maintenance Agent' module enables X-Cart to send email notifications to the store administrator with information about the store functioning during a certain period. These notifications can include visits statistics, orders statistics, various log messages (error logs, logs of file operations, DB backup/restore operations, data import, changes of environment settings, operations on products and orders, etc).

▪ **A number of improvements implemented in existing modules**

'Detailed Product Images' module:

The store administrator now has the ability to choose, how detailed product images should be displayed - on the Product details page, as usual, or in a separate window. When a separate window is used, detailed images can be switched dynamically (without page reloading).

'Discount Coupons' module:

Now the module provides more flexibility in creation of discount coupons:

- Absolute discounts can now be applied once per order, to each product item or to each product title.
- It is possible to set up 'Times to use' option based on 'per customer' principle.

'Extra Fields' module:

Multilanguage support has been added for extra field names.

The order of extra fields can now be controlled using the 'Orderby' field.

Extra fields can now be exported and imported.

'Gift Certificates' module:

Gift certificates can now be printed for sending by regular mail.

Two pre-designed sample templates have been added for printable gift certificates.

The store admin can choose to enable customers to choose a design for Gift certificate cards that will be sent by postal mail.

'Manufacturers' module:

Multilanguage values are now supported for manufacturer name and description.

Ability to use HTML tags in the description of manufacturers has been added.

Manufacturers' static pages can now be generated for the HTML catalog.

'News Management' module:

Multilanguage support has been added.

The store admin has been given more control over the process of sending newsletters (Newsletters can now be sent in batches. The store admin has the ability to define the number of emails which must be sent at a time and to adjust the delay between the batches).

'Product Options' module:

The interface for product options and product variants management has been redesigned.

Wholesale prices and thumbnail images are now supported for product variants.

'Wishlist' module:

The store administrator/providers can now view customer wish lists.

## 1.4.2 X-Cart 4.1.x Performance

We performed some testing to find out how the performance of X-Cart 4.1 differs from that of X-Cart 3.5.x and 4.0.x.

### Testing conditions

All tests were performed on X-Cart-based stores specially installed on our server for this purpose. The 3.5.x branch was represented by X-Cart 3.5.14, the 4.0.x branch - by X-Cart 4.0.18.

All the stores employed in testing were configured as follows:

- every category contained 10 products and had 5 featured products;
- every product had 3 wholesale prices;
- every object that could have an image had an image; images that could be stored on the file system were stored on the file system;
- every 10th product had 2 votes and 2 reviews;
- every product had 3 links to other products;
- every product had names in 3 different languages;
- every other product had 2 product options with 4 option values in each one;
- every 10th product had 2 'variant' product options with 5 option values in each one; each variant had 3 wholesale prices;
- there were 3 membership levels;
- there were 3 product classes with 10 features in each one; every 20th product was assigned to one of the classes;



- there were 100 customers;
- there were 3 destination zones;
- there were 3 taxes - with one tax rate per zone;
- a tax was applied to every product; every other product had more than one tax applied to it;
- there were 10 shipping rates;
- there were 20 manufacturers;
- every other product had a manufacturer;
- there were 10 orders containing 3 products and 1 gift certificate each;
- there were 5 return requests.

## Testing results

The results of testing compare page loading time on different X-Cart versions for the following pages:

### Welcome page and category pages

Number of products in the database	Page loading time on X-Cart 4.1 (as compared to other X-Cart versions)	
	under 1000	40-50% faster than X-Cart 4.0
5000	50-60% faster than X-Cart 4.0	20% faster than X-Cart 3.5
20 000	60-70% faster than X-Cart 4.0	2.5-3 times as fast as X-Cart 3.5

### Product details page

Number of products in the database	Page loading time on X-Cart 4.1 (as compared to other X-Cart versions)	
	under 1000	2-2.5 times as fast as X-Cart 4.0
5000	2-2.5 times as fast as X-Cart 4.0	1.5-2 times as fast as X-Cart 3.5
20 000	2.5-3 times as fast as X-Cart 4.0	2.5-3 times as fast as X-Cart 3.5

### Basic search using a product name

Number of products in the database	Page loading time on X-Cart 4.1 (as compared to other X-Cart versions)	
	under 1000	2 times as fast as X-Cart 4.0

Number of products in the database	Page loading time on X-Cart 4.1 (as compared to other X-Cart versions)	
5000	3 times as fast as X-Cart 4.0	1.5-2 times as fast as X-Cart 3.5
20 000	3-3.5 times as fast as X-Cart 4.0	n/a (the search script on X-Cart 3.5 could not complete the task)

## Summary

X-Cart 4.1 performance is stably higher than that of X-Cart 4.0.x branch on any number of products and categories. At the same time, page loading time on X-Cart 4.1 approaches that of X-Cart 3.5.x branch, although 4.1 offers much more complex functionality. In addition to that, when searching databases of up to 20 000 products, X-Cart 4.1 always fits into 8 MB of memory allotted to the application, which is not always the case with X-Cart 3.5.x and 4.0.x.

## 1.5 Licensing

This chapter is a 'plain words' explanation of X-Cart's 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:

1. supply to us your personal and contact information;
2. specify the type and quantity of X-Cart software products you want to use;
3. provide to us a License URL – a valid URL where the software will be run;
4. 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](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](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](http://www.x-cart.com/verify_license.html).

## 2 Installing and Configuring X-Cart

This section provides information about installing and configuring X-Cart.

- See the chapter [System Requirements](#) for a list of system requirements that need to be met before you try to install X-Cart software.
- Check out [Installing X-Cart](#) for detailed instructions on installing X-Cart.
- Study [Configuration Files](#) for information about X-Cart's main configuration files.

### 2.1 System Requirements

X-Cart system installs/runs on:



#### 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.

PCRE extension must be enabled.

`ini_set` function must not be included in the disabled functions list.

**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 3.23 and better.

**Note:** The most up-to-date information on compatibility with specific versions of MySQL is available on [www.x-cart.com](http://www.x-cart.com) website.

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 4.1.0 uses about 25 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). Loopback connections must be allowed by server firewall (required for HTML catalog feature).

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
```

- **OpenSSL PHP extension** for iDEAL Advanced and iDEAL RaboBank Professional payment modules.
- **GDLib 2.0 or higher** (for X-Magnifier addon).

Make sure the functions **exec**, **popen** and **pclose** 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), 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.

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](http://www.x-cart.com/ssl_certificates.html) for a list of recommended SSL certificates.

## Recommended PHP and MySQL options

- Set the error reporting level in the configuration file php.ini. In PHP 4 and PHP 5 the default value is:

```
error_reporting = E_ALL & ~E_NOTICE
```

It is recommended not to show E\_NOTICE level errors, which may be useful for debugging purposes only.

- To speed up Smarty template engine, it is advisable to enable the output\_buffering PHP option. The recommended value is 4096:

```
output_buffering = 4096
```

- Ask your server administrators to ensure that the 'wait\_timeout' value in your MySQL-configuration file is reasonably high (28800 recommended but 7200 at least).
- Also ask the server administrators to increase the 'max\_allowed\_packet' option in MySQL-configuration (up to 2-8M).

**Note:** a 'Lost connections' error may appear if the values of the two abovementioned options are too low.

## 2.2 Installing X-Cart

X-Cart shopping cart software can be installed [using X-Cart Installation Wizard](#) or [manually](#).

**Note:** Wizard installation is *recommended*; manual installation can be performed by advanced users.

The procedure is different for UNIX and Windows web servers.

**Important:** Before installing X-Cart, please make sure the [minimum system requirements](#) are met. Regardless of the employed installation method, after the installation is completed, follow our Post-install notes (security related).

If you do not wish to install X-Cart by yourself, please feel free to order installation services from X-Cart team. Our technical specialists will be glad to help you.

### Installing X-Cart using the Installation Wizard

To install X-Cart using the Installation Wizard:

1. Obtain an X-Cart distribution package by downloading it from *X-Cart File area*. The distribution package you need is contained in the archive file x-cart-x.y.tgz, where x and y are X-Cart version numbers.
2. Upload all the files of the X-Cart distribution package to a web accessible directory on your server or hosting account.

*Windows server, or UNIX server without terminal access:*

- a) Decompress the X-Cart distribution package archive to a local directory on your system using your favorite compression program (WinZIP or any other archiver with support for TAR files).
- b) Use an FTP client to upload all the files contained in this archive (retaining the directory structure) to a web accessible directory on your server or hosting account.

*UNIX server with terminal access:*

- a) Use an FTP client to upload the entire X-Cart distribution package archive to a web accessible directory on your server or hosting account.
- b) Unarchive the package using one of the following commands:

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

or

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

The result of above described manipulations should be a directory containing all the files of your X-Cart. Further in this manual we will refer to this directory as '/xcart directory', 'X-Cart installation directory', or 'X-Cart root'. If you do not feel like using the name '/xcart' for this directory, please feel free to pick a different name for it; however, in this case, you should remember to use your own X-Cart directory name in the place of '/xcart' wherever it is needed.

3. (*UNIX servers only*) Change the permissions on the /xcart directory, the file config.php and the scripts admin/newsletter.sh and payment/\*.pl as specified below :

```
> cd xcart
> chmod 777 .
> chmod 666 config.php
> chmod 755 admin/newsletter.sh
> chmod 755 payment/*.pl
```

**Note:** For more information on chmod utility, enter the command `man chmod` into the command line.

4. Point your browser at the location of your X-Cart with the addition of /install.php to launch X-Cart Installation Wizard.

*For example*, if your domain name is `www.example.com` and you placed your X-Cart application in the directory /xcart off your web root, you would enter `http://www.example.com/xcart/install.php` into your web browser address line.

5. Once the Installation Wizard is launched, follow the Wizard instructions. Make sure you complete all of the Installation Wizard steps. At the final step you will get an Auth code and instructions on how to access your store.

a) **Step 1: License agreement.**

The first time you run the Installation Wizard, it provides X-Cart Software License Agreement for you to accept. Please read X-Cart Software License Agreement. If you agree to all of the terms



of this agreement, select the 'I accept the License Agreement' check box and click **Next**. (By selecting 'I accept the License Agreement', you are consenting to be bound by this agreement). If you do not agree to the terms of the agreement, do not install the software.



Please note that, if it is not the first time you've launched the installation script on this system to install X-Cart or X-Cart skin files in the current directory (the installation script will know this by the presence of a /skin1 directory within X-Cart root; the directory /skin1 is created at *Step 6* of X-Cart installation), you will need to specify what you are trying to do (to create a new installation or to re-install skin files) and to provide your *Auth code*:

New installation  
 Re-install skin files

**Auth code:**   
 This is a protection from unauthorized use of installation script

I accept the License Agreement

**Note:** An Auth code is generated at the final step of your first X-Cart installation. See [Step 10: Installation complete](#) for details.

#### b) Step 2: Checking PHP configuration.


At this step, the setup program checks the files from which X-Cart will be installed for integrity and ensures that the configuration of the server on which the installation will be performed meets the minimum requirements.

On the left side of the page, you see the results of this test. It is a list of criteria used in the testing - with statuses, [OK] ("test passed successfully") or [FAILED] ("test failed"):

Environment checking		
Verification steps		Status
Verifying the integrity of essential files ...	-	[OK]
Inspecting server configuration		
Checking critical dependencies		Status
PHP Version (min 4.0.6 required) ... 4.4.4	-	[OK]
PCRE extension is ... On	-	[OK]
PHP Safe mode is ... On	-	[FAILED]
ini_set PHP function is ... Enabled	-	[OK]
File uploads are ... On	-	[OK]
MySQL database support is ... On	-	[OK]
Register long arrays is ... On	-	[OK]
Checking non-critical dependencies		Status
Disabled functions list ... popen	-	[FAILED]
Maximum file size for upload is ... 2M	-	[OK]
fopen() function can open URLs ... On	-	[OK]
Checking blowfish encryption mode ... OK	-	[OK]

Ideally, all the lines in the test results should be marked [OK]. If this is the case, the page looks as

follows:

X-Cart Installation Wizard  
Step 2: Checking PHP configuration  
Version 4.1.9

---

**Environment checking**

Verification steps	Status
Verifying the integrity of essential files ...	- [OK]

**Inspecting server configuration**


Checking critical dependencies	Status
PHP Version (min 4.0.6 required) ... 4.4.4	- [OK]
PCRE extension is ... On	- [OK]
PHP Safe mode is ... Off	- [OK]
ini_set PHP function is ... Enabled	- [OK]
File uploads are ... On	- [OK]
MySQL database support is ... On	- [OK]
Register long arrays is ... On	- [OK]

Checking non-critical dependencies	Status
Disabled functions list ... none	- [OK]
Maximum file size for upload is ... 2M	- [OK]
fopen() function can open URLs ... On	- [OK]
Checking blowfish encryption mode ... OK	- [OK]

**Before the installation starts, please ensure that you have properly configured file access permissions (UNIX only):**

```
> chmod 777 .  
> chmod 666 config.php  
> chmod 755 admin/newsletter.sh  
> chmod 755 payment/*.pl
```

< Back Next >



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The green label 'Passed' signifies that the test has been passed successfully, and you can continue with the installation (To continue, click the **Next** button at the bottom of the page).

If, however, the test results section displays one or more [FAILED] marks, on the right-hand side of the screen, instead of the 'Passed' label, you will see messages similar to these:

**✘ Critical dependencies failed:**

1. **Safe Mode is enabled.** Safe Mode must be turned off for correct operation of X-Cart application.  
[+ Click here to see details](#)

**⚠ Non-critical dependencies failed:**

1. **Some PHP functions (popen) are disabled for execution.** Certain parts of X-Cart's functionality rely on the availability of these functions and might be unavailable.  
[+ Click here to see details](#)

At this point, it needs to be said that, for successful installation, only two conditions are essential: 1) The files of the original X-Cart distribution must be unaltered (The line 'Verifying the integrity of essential files' must be marked [OK]); 2) All critical dependencies must be satisfied (All the lines in the 'Checking critical dependencies' subsection must be marked [OK]). If both these conditions are met, you can continue with the installation - even if there is one or more [FAILED] marks in the 'Checking non-critical dependencies' subsection. If, however, any of the two essential conditions is not satisfied, you will not be able to continue with the installation until the issue is resolved.

You can use the links [\[+\] Click here to see details](#) to get more information about the issues that have been detected and to find out how they can be resolved:

 **Critical dependencies failed:**

1. **Safe Mode is enabled.** Safe Mode must be turned off for correct operation of X-Cart application.

 [Click here to see details](#)

To disable Safe Mode:

**1. If you have access to php.ini file**

Locate the `/u/dohtur/public_html/php.ini` file, find and edit the following line within the file:

```
safe_mode = On
```

change to:

```
safe_mode = Off
```

Save the file, then restart your web server application for the changes to take effect.

**2. If you do not have access to php.ini file**


Please contact your Hosting Support team to adjust this parameter.

 **Non-critical dependencies failed:**

1. **Some PHP functions (popen) are disabled for execution.** Certain parts of X-Cart's functionality rely on the availability of these functions and might be unavailable.

 [Click here to see details](#)

If you cannot resolve the issues detected by the test by yourself, you can send a report to X-Cart technical support service. To send a report, click the **Send report** button:



Our testing has identified some problems. Do you wish to send a report about your server configuration and test results so we can analyse it and fix the problems?

A page will be opened that will help you to send your report:

## Technical problems report

Our testing has identified some problems. Do you wish to send a report about your server configuration and test results so we can analyse it and fix the problems? Please fill in all the required fields below.

You can find more information about X-Cart software at [X-Cart: Frequently asked questions](#) page.


### Technical problems report:

```
X-Cart version: Version 4.1.9
-----
Report time: Wed, 26 Sep 2007 11:35:22 +0400
-----
HTTP_REFERER: http://neo.crtdev.local/~dohtur/419/install.php
-----
CRITICAL ERRORS:
-----
- Safe Mode is enabled. Safe Mode must be turned off for correct operation of X-
Cart application. [CHECK RESULT: On]
-----
NONCRITICAL ERRORS:
-----
- Some PHP functions (popen) are disabled for execution. Certain parts of X-
Cart's functionality rely on the availability of these functions and might be
unavailable. [CHECK RESULT: popen]
-----
```

The text of your report with a detailed description of your problem will be generated automatically (You will be able to see it in the 'Technical problems report' section). If necessary, you will be able to add any additional information in the 'Additional comments' section. To submit the report, click the **Send report** button at the bottom of the page. The report will be posted to X-Cart's HelpDesk as a regular support ticket. To get a solution for the problem described in this ticket, you will need to log in to your HelpDesk account. Please note that submitting a report will reduce your support points balance.

### c) Step 3: Preparing to install X-Cart database.

At this step, the Installation Wizard requires you to specify the host name of the server where you store will be located, the host name of your secure server and MySQL database information.



## X-Cart Installation Wizard

### Step 3: Preparing to install X-Cart database

Version 4.1.9

**The Installation Wizard needs to know your web server details and MySQL database information:**

<b>Server host name</b> Host name of your server (e.g. www.mywebstore.com)	<input type="text" value="www.example.com"/>
<b>Secure server host name</b> Host name of your secure (HTTPS) server (e.g. secure.mywebstore.com)	<input type="text" value="www.example.com"/>
<b>X-Cart web directory</b> Web directory where X-Cart files are located (e.g. /xcart)	<input type="text" value="/xcart"/>
<b>MySQL host name</b> Host name of MySQL server. It can be host name or IP address	<input type="text" value="localhost"/>
<b>MySQL user name</b> The name of the MySQL user	<input type="text" value="xcart"/>
<b>MySQL database name</b> The name of the database you connect to	<input type="text" value="xcart"/>
<b>MySQL password</b> Which password to use for MySQL	<input type="text" value="xcart"/>
<b>Your e-mail address</b> This address will be used as default for company options	<input type="text" value="your_email@domain.com"/>

**Push the "Next" button below to continue**

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Use the fields in this section to provide the following information:

- Server host name - Host name of the server on which you wish to install your X-Cart software.
- Secure server host name - Host name of the secure server that will provide access to your X-Cart-based store via the HTTPS protocol.

**Important:** Please remember that a server name does **not** include http:// ! Enter just the domain name, like www.example.com. Also be aware that your secure HTTPS server host name may or may not be the same as the HTTP server host name. If, for the moment, you do not have an HTTPS server, or if you do not know its name, temporarily use your HTTP server name for the 'Secure server host name' field. You will be able to change it later by editing the variable \$xcart\_https\_host in the configuration file [config.php](#).

- X-Cart web directory - X-Cart installation directory as seen from the Web (not from the file system).

**Note:** As a rule, the setup program detects this directory automatically; however, if the detection has not been a success, you may want to enter the appropriate web directory name manually. Put a slash before the name of the directory and no slash at the end (for example, /xcart). If you are installing X-Cart in the site root, leave the field empty.

- MySQL host name - DNS name or IP of your MySQL server
- MySQL user name - your MySQL user account name.
- MySQL database name - name of your MySQL database.

- MySQL password - password for access to your MySQL user account.

**Note:** The database server name is typically localhost, but this is not universal! If you do not have or do not know the name of your database server, your database name, etc. please check with your hosting provider.

Please also provide an email address that will be used as the default address for your company options. The address you provide here will be automatically inserted by X-Cart into all the email address fields in the General settings->Company options section of your store and all the email address fields in the profiles of the default users that will be created at the time of X-Cart installation. An email notification about a successful installation of X-Cart will also be sent to this address.

Click on **Next**. A page will appear displaying the data you provided regarding your web server and MySQL database and a few more fields:





## X-Cart Installation Wizard

### Step 3: Preparing to install X-Cart database

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<b>Server host name</b> Host name of your server (e.g. www.mywebstore.com)	www.example.com
<b>Secure server host name</b> Host name of your secure (HTTPS) server (e.g. secure.mywebstore.com)	www.example.com
<b>X-Cart web directory</b> Web directory where X-Cart files are located (e.g. /xcart)	/xcart
<b>MySQL host name</b> Host name of MySQL server. It can be host name or IP address	localhost
<b>MySQL user name</b> The name of the MySQL user	xcart
<b>MySQL database name</b> The name of the database you connect to	xcart
<b>MySQL password</b> Which password to use for MySQL	xcart
<b>Your e-mail address</b> This address will be used as default for company options	your_email@domain.com
<b>Languages</b> Languages you want to install (use Ctrl key to select multiple options)	<input type="text" value="English"/>
<b>States table</b> States of the country where the shop is located (use Ctrl key to select multiple options)	<input type="text" value="Luxembourg, Netherlands, Spain, United Kingdom (Great Britain), United States"/>
<b>Sample categories/products</b> Would you like to setup sample categories and products?	<input type="text" value="Yes"/>
<b>Configuration settings</b> Apply pre-configured settings to selected country	<input type="text" value="United States"/>
<b>Update config.php only</b> Tick this if you want to skip database setup (no data will be installed in the database)	<input type="checkbox"/>
<b>Store images in</b> Select where you want to store your images	<input type="text" value="File system"/>

**Push the "Next" button below to begin the installation**

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Make sure the web server and MySQL database details provided by you at the previous stage are correct.

Then provide some additional information as to what your X-Cart installation should be like:

- **Languages:** At the moment, X-Cart is shipped with an only language pack - English, which is selected as the language pack to be installed by default. If, at some point in the future, X-Cart comes to provide other official language packs, you will be able to select any language packs you would like to install from this selectbox.
- **States table:** If your company is located in a country that has states, or if your X-Cart-based store

is going to sell and ship products to countries that have states, you may want to import state names for each of these countries. It will be possible to use imported state names for setting up destination zones, your company address and specific user addresses. If you wish to import state names, use the 'States table' selectbox to specify the countries for which you wish to import states. To select a country, simply click on its name with your mouse (The country name will be highlighted). To select more than one country, hold down the CTRL key while clicking the appropriate country names. If you do not wish to import states, select *No states*. In any case, you will be able to add state names manually after X-Cart is installed.

- **Sample categories/products:** For the purposes of testing of a newly installed X-Cart store, the Installation Wizard allows you to import sample products and categories (the sample categories/products set will be pretty much the same thing you see in X-Cart demo installed at our company site). As soon as you've finished testing, the imported sample categories/products can be removed with just a couple of clicks through the Summary->Tools section. If you wish to import sample categories/products, select *Yes* (If not, select *No*).
- **Configuration settings:** For some countries, pre-configured store settings are available (This includes some pre-configured taxes, destination zones, default company and customer addresses and phone numbers, and language variables which may differ from one country to another - like *zip code/postal code*). If you think using such pre-configured settings can help you make the process of configuring your store faster, see if your country is listed in the 'Configuration settings' drop-down box and, if it is, select this country to import the settings.
- **Update config.php only:** If you are installing X-Cart for the first time, or if you want to completely re-install your X-Cart, leave this check box empty. If you wish only to update the information in config.php, keeping your current database, select this check box.  
If you are installing X-Cart over the database, left from another installation, make sure you specify the blowfish key which was emailed to you during the previous installation. If you fail to do that, the key which is included into the new X-Cart will not be able to decrypt the encrypted data from the old database.
- **Store images in *Database / File system*:** This field allows you to define the location of your store's image repository.

Click on **Next**.

#### d) **Step 4: Installing X-Cart database.**

At this step, the installation script will use the information you provided at Step 3 to update X-Cart's main configuration file config.php and to set up the store database:

- The host name, secure host name and name of X-Cart web directory will be written to config.php.
- In the database, the necessary tables will be created and populated with X-Cart data.

- If you have chosen to move all the store images to the file system, they will be moved.

```
Updating config.php file...
[OK]

Creating tables...

Please wait ...
[OK]


Please wait ...
Creating table: [xcart_benchmark_pages] ... [OK]
Creating table: [xcart_categories] ... [OK]
Creating table: [xcart_categories_lng] ... [OK]
Creating table: [xcart_categories_subcount] ... [OK]
Creating table: [xcart_category_memberships] ... [OK]
Creating table: [xcart_cc_gestpay_data] ... [OK]
Creating table: [xcart_cc_pp3_data] ... [OK]
Creating table: [xcart_ccprocessors] ... [OK]
Creating table: [xcart_class_lng] ... [OK]
Creating table: [xcart_class_options] ... [OK]
Creating table: [xcart_classes] ... [OK]
```

**Note:** The time required for completing this installation step depends on the performance of your server; however, the process is unlikely to take longer than 5 minutes.

When this installation step is completed, click on **Next** to continue.

#### e) Step 5: Color and layout settings.

Select a layout, a color scheme and a dingbat set that you wish to use for the front-end of your store.



X-Cart Installation Wizard  
Step 5: Color and layout settings

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**Select color/layout:**

**Layout**  
Select shop layout

**Color scheme**  
Select color scheme

**Dingbats**  
Select dingbats set

light and lucid ▾

orange (default) ▾

default ▾

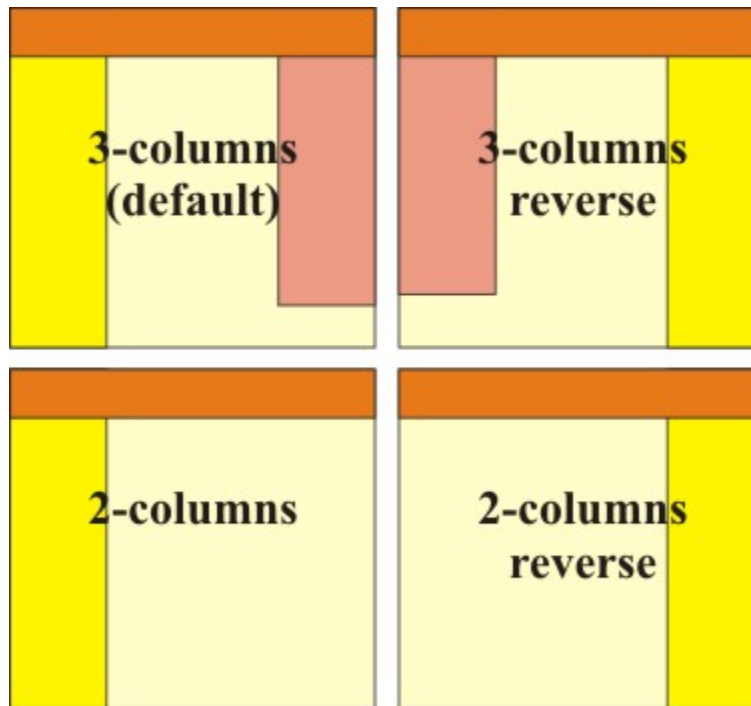
Color scheme	Recommended dingbat sets
orange (default)	default, colortrans, redemboss, blackback, color
blue	colortrans, blackback, color, blue!
green	colortrans, greenround!, blackback, color
grey	default, colortrans, redemboss, blackback, color
red	colortrans, redemboss, blackback, color
yellow	default,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

**Push the "Next" button below to begin the installation**

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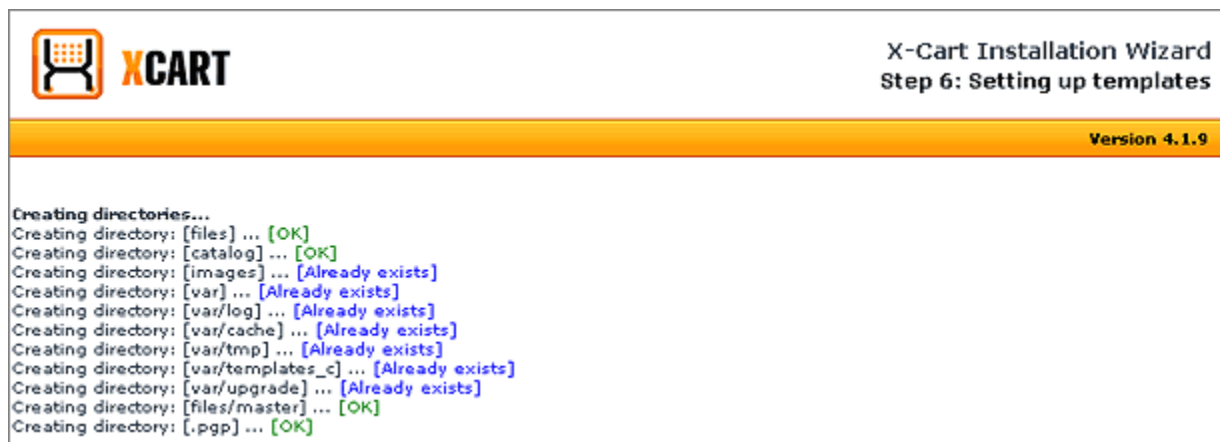
At present, five X-Cart shop layouts are available: *3-columns (default)*, *3-columns reverse*, *2-columns*, *2-columns reverse* and *small shop* (In the main, small shop reproduces the 2-column reverse layout, but includes fewer menus).



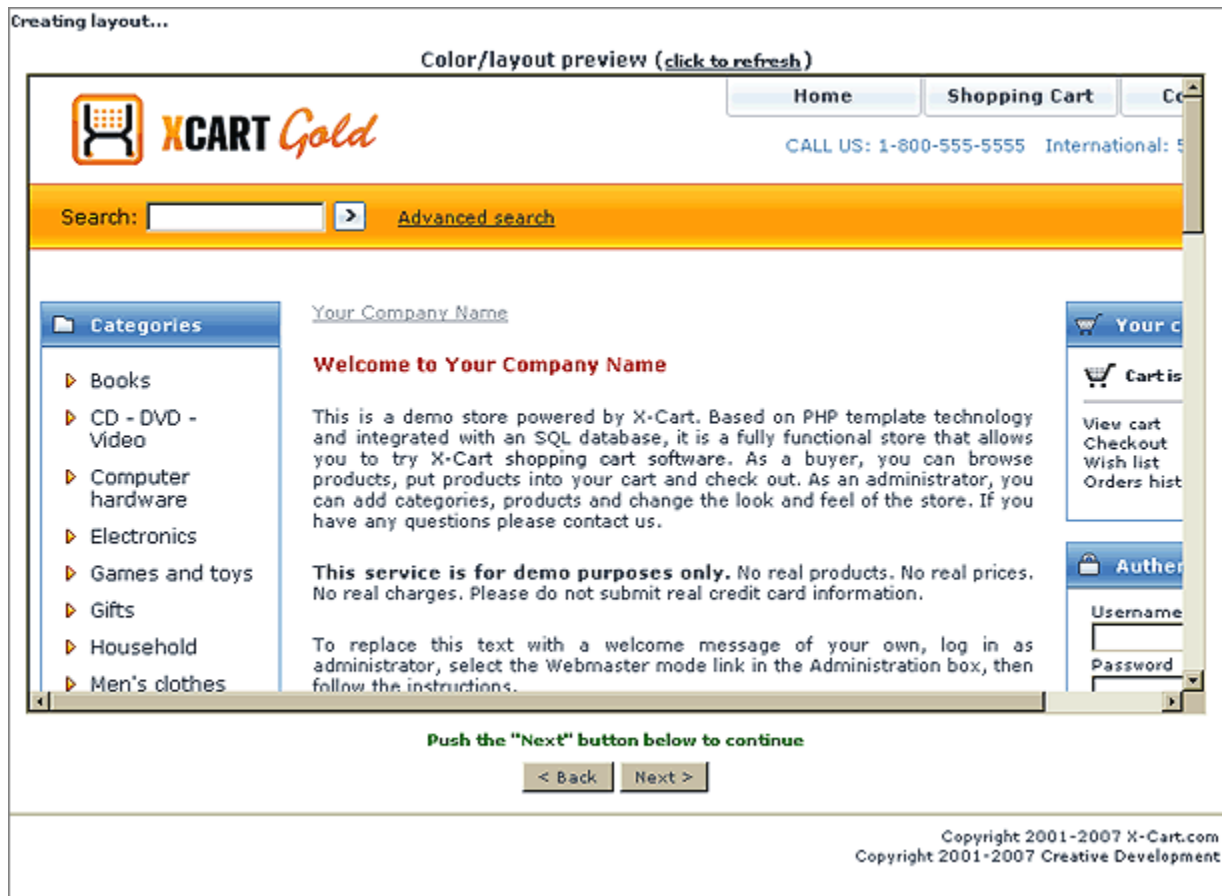
After the desired settings are selected, click on **Next**. The installation will continue.

f) **Step 6: Setting up templates.**

The setup program will create the necessary X-Cart folders and copy the necessary templates.



After the process is completed, the Installation Wizard will display a preview of the chosen color/layout style:

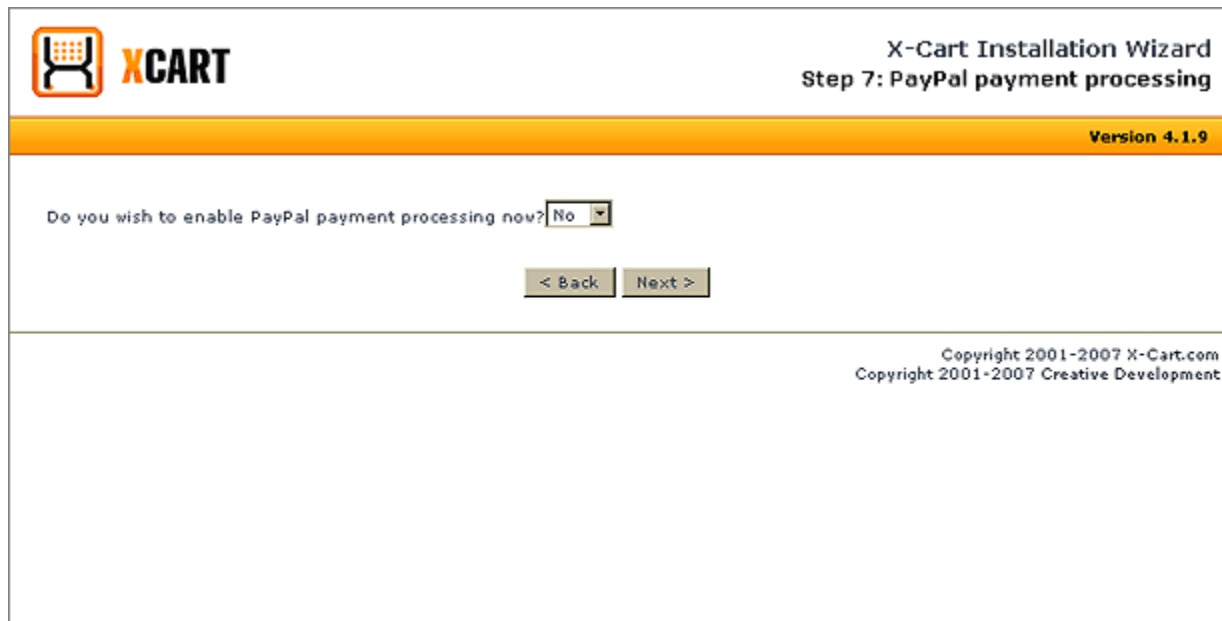


If you are satisfied with the way a shop site looks in the preview and want to accept the selected color/layout style for your own store, click on **Next**.

#### g) Step 7: PayPal payment processing.

Specify whether you wish to enable PayPal payment processing in your store by selecting *Yes* or *No* from the drop-down box.

**Tip:** Do not worry about making a final decision as to enabling PayPal payment processing at this step: you will be able to enable/disable PayPal at any time later via the administration back-end of your store.



 X-Cart Installation Wizard  
Step 7: PayPal payment processing

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Do you wish to enable PayPal payment processing now?

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Click on **Next**.

#### h) Step 8: Enabling PayPal payment processing.

Specify an email address you wish to use for PayPal registration, or (if you already have an account with PayPal) an email address your current PayPal account is registered for.



 X-Cart Installation Wizard  
Step 8: Enabling PayPal payment processing

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**The Installation Wizard needs to know the email address you wish to use for PayPal registration or the email address your current PayPal account is registered for**

**E-Mail address for PayPal**  
leave blank, if you do not wish to configure PayPal at this time

After you click on 'Next' a verification message will be sent to the email address specified here. Please follow the web link in this message to enable PayPal payments in your store.

**Notes:**

1. Please make sure the spam filter on this mail box is configured to accept notifications from PayPal & X-Cart.
2. PayPal and other payment gateways can be configured on the "Payment methods" page in X-Cart administrator backoffice at any time later.

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Click on **Next**. A verification message will be sent to the email address provided at this step. To enable PayPal payments in your store, confirm your desire to use PayPal by clicking a web link in this message.

i) **Step 9: Generating a system fingerprint.**

At this step, a fingerprint of the newly installed X-Cart system will be generated. Please be patient, the process may take a few minutes.

**Note:** In X-Cart, a system fingerprint is a list of MD5 checksums of all X-Cart files. The system fingerprint generated during X-Cart installation reflects your store's original (unmodified) state and can be used later to control the integrity of your store's files. For details on using X-Cart's fingerprints, please refer to the chapter [System Fingerprints](#) further in this manual.



After the fingerprint generation is completed, the Installation Wizard will display a message 'System fingerprint is successfully generated'. Click on **Next**.

j) **Step 10: Installation complete.**

This is the final step of X-Cart installation. It notifies you that an X-Cart-based store has been successfully installed, displays an *Auth code* for your X-Cart installation and provides important security-related [post-install notes](#). It also provides links to the URLs at which the newly installed store can be accessed.

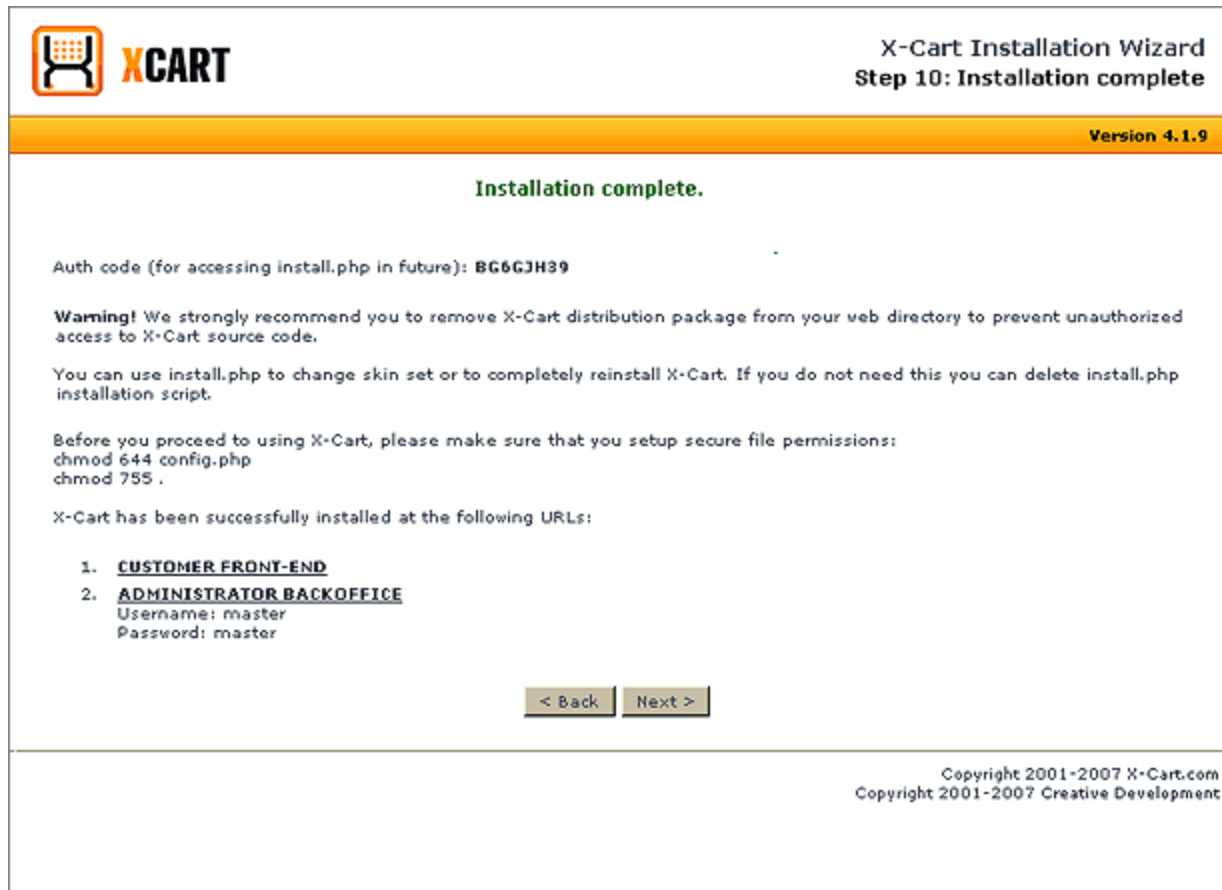
If, at *Step 3* of the installation process (*Preparing to install X-Cart database*), you provided an email address in order to receive an email notification about the successful completion of the installation, this notification will be sent. It will provide store access information, post-install notes, your installation Auth code and Blowfish encryption key.

**Note:** *Auth code* and *Blowfish encryptionkey* are two special key codes generated in the process of X-Cart installation.



Auth code 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.

Blowfish key is used to encrypt all sensitive data in your store including user passwords, order details, etc. This code is supposed to be stored permanently in `config.php` (the variable `$blowfish_key`). Please **do not** change this key manually.



**X-Cart** X-Cart Installation Wizard  
Step 10: Installation complete

Version 4.1.9

**Installation complete.**

Auth code (for accessing `install.php` in future): **BG6GJH39**

**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

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6. Please follow the instructions in our [post-install notes](#).

## Installing X-Cart manually

This section assumes that you are installing your X-Cart on a UNIX server with terminal access. Basic knowledge of UNIX operating system is required.

To install X-Cart manually:

1. Obtain an X-Cart distribution package by downloading it from *X-Cart File area*. The distribution package you need is contained in the archive file `x-cart-x.y.z.tgz`, where `x`, `y` and `z` are X-Cart version numbers.

2. Use an FTP client to upload the entire X-Cart distribution package archive to a web accessible directory on your server. Unarchive the package using one of the following commands:

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

or

```
tar -xzvf x-cart-X.Y.Z.tgz
```

The result of decompressing the archive should be a directory containing all the files of your X-Cart. Further in this manual we will refer to this directory as '/xcart directory', 'X-Cart installation directory', or 'X-Cart root'. If you do not feel like using the name '/xcart' for this directory, please feel free to pick a different name for it; however, in this case, you should remember to use your own X-Cart directory name in the place of '/xcart' wherever it is needed.

3. When X-Cart is being installed using X-Cart Installation Wizard, the Wizard automatically creates all the directories that need to be created within the directory /xcart and sets proper permissions on these directories so X-Cart can use them to create files required for the store operation. In manual installation, you need to create these directories and set their permissions manually. Create directories /files, /catalog and /var under the directory /xcart and set their permissions to 777; copy the directory /skin1\_original to a directory /skin1 and set the permissions 777 for every subdirectory and file under the directory /skin1; if you are going to use PGP encryption method, copy the contents of the directory .pgp.def to a directory .pgp; set the permissions 755 on the script admin/newsletter.sh (this script is used for sending newsletter emails in News Management module) and on all the payment scripts of the payment/\*.pl type:

```
> cd xcart
> mkdir files
> mkdir catalog
> mkdir var
> cp -R .pgp.def .pgp # If you are planning to use PGP encryption
> cp -Rp skin1_original skin1
> chmod 777 files
> chmod 777 catalog
> chmod 777 var
> chmod -R 777 skin1
> chmod 755 admin/newsletter.sh
> chmod 755 payment/*.pl
```

4. Open X-Cart's main configuration file config.php for editing in your favorite text editor and set the following variables:

```
$sql_host = '%SQL_HOST%';
$sql_user = '%SQL_USER%';
```

```
$sql_db = '%SQL_DB%';  
$sql_password = '%SQL_PASSWORD%';
```

and

```
$xcart_http_host = "$HTTP_HOST";  
$xcart_https_host = "$HTTP_HOST";  
$xcart_web_dir = "/xcart";
```

5. Setup a database to be used with X-Cart: clear all the data which might be contained in the database, create the necessary X-Cart database tables and populate them with data. To do so, use 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, before you start using X-Cart as a basis for a live store, you want to learn how it works, you might want to import some demo data (sample products and categories) into the store database. As soon as you decide you no longer need these products and categories, you will be able to remove them with just a couple of clicks through the Summary->Tools section of X-Cart administration back-end. To import demo data, issue the following command:

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

If your company is located in a country that has states, or if your X-Cart-based store is going to sell and ship products to countries that have states, you may want to import state names for each of these countries. It will be possible to use the imported state names for setting up destination zones, your company address and specific user addresses. To import states for a country, issue the following command:

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

replacing *<Country>* by one of the following values:

- AT - Austria
- AU - Australia
- BE - Belgium
- CA - Canada
- DE - Germany
- ES - Spain
- FR - France
- IT - Italy
- LU - Luxemburg
- NL - Netherlands
- UK - United Kingdom

## US - United States

By default, your store will be installed with some pre-configured settings typical for the United States. Pre-configured settings affect such areas of X-Cart functionality as taxes, destination zones, default company and customer addresses and phone numbers, and some language variables (for example, a US installation will have a 'zip code' field in all the default addresses instead of the 'postal code' more typical for the UK). If your store is based in a country other than the United States, you may want to import a different set of configuration settings. At present, pre-configured store settings for Canada, Australia and the United Kingdom are available. If you want to import pre-configured settings for any of these countries, issue the following command:

```
> mysql -u <username> -p<password> <database_name> < sql/xcart_conf_<Country
```

<Country> needs to be replaced by one of the following values:

CA - Canada

UK - United Kingdom

AU - Australia

Please note that, if manual installation is used to re-install X-Cart on top of a previously installed one, and the database is installed anew, you need to replace the value of the variable \$blowfish\_key in the file config.php of your installation by the default Blowfish key. The default Blowfish key can be copied from the variable \$init\_blowfish\_key in your install.php. This is essential, because the Blowfish key used in your new database equals the default Blowfish key, not the Blowfish key generated in the process of the previous X-Cart installation that is stored in config.php. Failure to replace the Blowfish key in config.php by the default Blowfish key from install.php will result in the inability of any users to log in to X-Cart.

## Post-install notes (security related)

Before you proceed to using X-Cart, please restore secure permissions on the file config.php and your X-Cart installation directory. Issue the following commands:

```
> chmod 644 config.php
> chmod 755 .
```

**Important:** We strongly recommend you remove X-Cart distribution package archive from your web directory to prevent unauthorized access to X-Cart source code.

The script install.php you used for installing X-Cart can be used again to change the skin set of your store or to completely re-install X-Cart. If you think you are not going to need this script in the nearest future, we recommend you remove it from the web-accessible directory keeping a copy of the file in a safe place (If, at some time later, you need to run X-Cart installation again, you will need to re-upload the script install.php to X-Cart installation directory). However, if, for the moment, you need to keep the script install.php

in its initial location in the web directory, change your Auth code. To do so, edit the value of the `$installation_auth_code` variable in `include/install.php` and ensure that only people authorized to perform X-Cart re-installation can access this file.

Note that, if your X-Cart store was installed manually, the Blowfish key that was used to encrypt the data in your database corresponds to the default value of `$init_blowfish_key` in `install.php`. Using this value as a Blowfish key is not secure, so, after installing X-Cart using the manual method, you need to re-generate your Blowfish key by clicking the button **Regenerate** in the Admin area->Summary page->Tools page->Re-generating the Blowfish encryption key section.

## 2.3 Configuration Files

The majority of tasks related to configuring your store and adjusting the store settings can be done via your store's Admin area. However, some low-level 'static' settings (i.e. those that define the system behavior of X-Cart and that you aren't going to change often) are stored in X-Cart configuration files, and in some cases you might want to edit the configuration files to adjust these settings.

At present X-Cart has two configuration files:

- [/config.php](#)
- [/top.inc.php](#)

**Warning:** We strongly recommend you refrain from changing the configuration files, where possible. If, however, you decide to edit `config.php` or `top.inc.php`, be sure to make a backup copy of the file before you change anything.

### config.php configuration file

X-Cart's main configuration file is `config.php`. It is a plain text file that resides in the root directory and provides global definitions. Following is a list of the most important settings contained in the file `config.php` of which you should know.

#### SQL database details

```
$sql_host = '%SQL_HOST%';  
$sql_user = '%SQL_USER%';  
$sql_db = '%SQL_DB%';  
$sql_password = '%SQL_PASSWORD%';
```

This section of `config.php` sets up a connection between X-Cart shopping cart software and your MySQL database. If you install X-Cart via the Web, X-Cart Installation Wizard asks you to provide your MySQL server information and automatically enters it into this section. However, if you install X-Cart manually, or

if, after X-Cart has been installed, your MySQL server information changes, you are supposed to provide database access information by assigning values to the variables of this section manually.

The variables are supposed to have the following values:

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

### X-Cart HTTP & HTTPS host and web directory

```
$xcart_http_host = "$HTTP_HOST";  
$xcart_https_host = "$HTTP_HOST";  
$xcart_web_dir = "/xcart";
```

This section defines the location of your X-Cart installation. If you install X-Cart via the Web, X-Cart Installation Wizard asks you to specify your web server details and automatically enters them into this section. However, if you install X-Cart manually, you are supposed to provide this information manually.

The variables are supposed to have the following values:

- `$xcart_http_host` – Host name of the server on which your X-Cart software is to be installed.
- `$xcart_https_host` – Host name of the secure server that will provide access to your X-Cart-based store via the HTTPS protocol.

**Important:** The variables `$xcart_http_host` and `$xcart_https_host` must contain host names only (no `'http://'` or `'https://'` prefix, no trailing slashes).

**Tip:** If you are not sure what the host name of your secure server is, contact your hosting provider. In most cases the names of your secure and non-secure servers will be the same.

- `$xcart_web_dir` – X-Cart web directory.

**Important:** You are supposed to provide the name of your X-Cart installation directory as seen from the Web, not from the file system. The general rule is to put a slash before the name of the directory and no slash at the end (for example, `/xcart`). An exception to this rule is when you install X-Cart in the site root, in which case you need to leave the variable empty.

#### Example 1:

Setting the web server details as follows:

```
$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:

Setting the web server details as follows:

```
$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/
```

## Storing Customers' Credit Card Info

```
$store_cc = false;
```

The variable `$store_cc` defines whether you want the credit card info provided by your customers at checkout to be stored in the database or not. The credit card info that can be stored includes:

- Cardholder's name;
- Card type;
- Card number;
- Valid from (*for certain card types*);
- Exp. date;
- Issue No (*for certain card types*).

Admissible values for the `$store_cc` variable are 'true' and 'false'. By default, the value of this variable is set to 'false', which means that your customers' credit card info is not stored. Precisely speaking, this means that, when a customer submits his payment details at checkout, his credit card data is not entered into the order details and not saved to his user profile. If the payment method being used presupposes credit card processing via a payment gateway, the credit card data entered by your customer goes directly to the payment gateway, leaving no trace in your database tables. This approach spares you the necessity of having to address security issues associated with storing credit card data and is common practice for online stores accepting credit card payments via payment gateways.

**Important:** If you use any payment method involving manual processing of credit cards, setting `$store_cc` to 'false' will prevent you from getting credit card data of the customers who use that method. To be able to perform manual credit card processing, set the value of `$store_cc` to 'true' or think of an alternative way of getting credit card data from customers. Also, mind that X-Cart 'Subscription' module needs your customers' credit card info to be able to automatically charge the credit cards used for paying for subscription products. Accordingly, if you are going to use 'Subscription' module, set the value of `$store_cc` to 'true'.

By setting the `$store_cc` variable value to 'true' you agree to allow X-Cart to store your customers' credit card info in order details and user profiles.

**Warning:** Storing credit card info is **not** recommended as being associated with the risk of making your customers' credit card accounts vulnerable to those who might wish to use them illegally. If you decide to accept the responsibility of storing credit card info, make sure the database that will be used for this purpose is properly secured to protect sensitive cardholder data. Failure to provide adequate security may result in data theft and potentially involves legal liability.

## Storing CVV2 codes

```
$store_cvv2 = false;
```

The variable `$store_cvv2` defines whether you want the CVV2 codes of your customers' credit cards to be stored in the database or not.

Admissible values for the `$store_cvv2` variable are 'true' and 'false'. By default, the value of this variable is set to 'false', which means that your customers' CVV2 codes are not stored. Precisely speaking, this means that, when a customer submits his payment details at checkout, the CVV2 code of his credit card is not entered into the order details and not saved to his user profile. If the payment method being used presupposes credit card processing via a payment gateway, the CVV2 code entered by your customer goes directly to the payment gateway, leaving no trace in your database tables. This approach spares you the necessity of having to address security issues associated with storing CVV2 codes with the rest of credit card data.

**Important:** If you use any payment method involving manual processing of credit cards, setting `$store_cvv2` to 'false' will prevent you from getting the CVV2 codes of the customers who use that method. To be able to perform manual credit card processing, set the value of `$store_cvv2` to 'true' or think of an alternative way of getting CVV2 codes from customers. Also, mind that X-Cart 'Subscription' module needs your customers' CVV2 codes to be able to automatically charge the credit cards used for paying for subscription products. Accordingly, if you are going to use 'Subscription' module, set the value of `$store_cvv2` to 'true'.

By setting the `$store_cvv2` variable value to 'true' you agree to allow X-Cart to save and store CVV2 codes in the order details and in the user profiles of the customers who provide them.

**Warning:** Storing CVV2 codes (especially, with the rest of credit card data) is **not** recommended as being associated with the risk of making your customers' credit card accounts vulnerable to those who might wish to use them illegally. If you decide to accept the responsibility of storing CVV2 codes, make sure the database that will be used for this purpose is properly secured. Failure to provide adequate security may result in data theft and potentially involves legal liability.

### Storing Customers' Checking Account Details

```
$store_ch = false;
```

The variable `$store_ch` defines whether you want your customers' checking account details to be stored in the database or not. The checking account details that can be stored include:

- Bank account number;
- Bank routing number;
- Fraction number.

Admissible values for the `$store_ch` variable are 'true' and 'false'. By default, the value of this variable is set to 'false', which means that your customers' checking account details are not stored. Precisely speaking, this means that, when a customer submits his payment details at checkout, his checking account data is not entered into the order details. If the payment method being used presupposes check processing via a payment gateway, the checking account data entered by your customer goes directly to the payment gateway, leaving no trace in your database tables. This approach spares you the necessity of having to address security issues associated with storing checking account data in the database.



**Important:** If you use any payment method involving manual processing of checks, setting `$store_ch` to 'false' will prevent you from getting the checking account details of the customers who use that method. To be able to perform manual check processing, set the value of `$store_ch` to 'true' or think of an alternative way of getting checking account details from customers.

By setting the `$store_ch` variable value to 'true' you agree to allow X-Cart to save and store your customers' checking account details in the order details.

**Warning:** Storing checking account details is **not** recommended as being associated with the risk of making your customers' checking accounts vulnerable to those who might wish to use them illegally. If you decide to accept the responsibility of storing your customers' checking account details, make sure the database that will be used for this purpose is properly secured. Failure to provide adequate security may result in data theft and potentially involves legal liability.

### Default images

```
$default_image = "default_image.gif";
```

The variable `$default_image` defines which image file should be used as the default "No image available" picture (a picture that will appear in the place of any missing image in your X-Cart-based store if no other "No image available"-type picture is defined for that case). By default, the value of this variable is set to "default\_image.gif". You can find the file `default_image.gif` in X-Cart root directory.



default\_image.gif

**Note:** You can upload your own default images to be used in place of missing X-Cart images of different types (product thumbnails, product images, category icons, detailed images, variant images, manufacturer logos, product class images) via the section 'Images Location'.

```
$shop_closed_file = "shop_closed.html";
```

The variable `$shop_closed_file` defines which HTML page should be displayed to anyone trying to access the Customer zone of your store when the store is closed for maintenance. By default, the value of this variable is set to "shop\_closed.html". You can find the file `shop_closed.html` in X-Cart root directory.

Sorry, the shop is inaccessible temporarily. Please try again later.

shop\_closed.html (fragment).

### Single Store mode (X-Cart PRO only)

```
$single_mode = true;
```

The variable `$single_mode` allows you to enable/disable Single Store mode if your store is based on X-Cart PRO. Single Store mode is an operation mode in which your store represents a unified environment shared by multiple providers in such a way that any provider can edit the products of the other providers, and shipping rates, discounts, taxes, discount coupons, etc are the same for all the providers.

Admissible values for the `$single_mode` variable are 'true' and 'false'. Setting the variable to 'true' enables Single Store mode. Setting the variable to 'false' allows your store to function in normal mode so that each of your providers will be able to control his own products only and to have shipping rates, discounts, taxes, etc different from those of the other providers.

**Important:** If your store is based on X-Cart GOLD, the value of `$single_mode` must be set to 'true' at all times. Setting the variable to 'false' will not turn your GOLD shop into PRO.

Please be aware that the value of the `$single_mode` variable should be changed **before** any products, destination zones, shipping and tax rates are configured in the store. If you try to change the value of this variable after some providers have adjusted their store settings, these settings are highly likely to be corrupted.

### FedEx Rates directory

```
$fedex_default_rates_dir = $xcart_dir."/shipping/FedEx/";
```

The variable `$fedex_default_rates_dir` defines the location of the directory where files for the calculation of FedEx shipping rates are stored. By default, the value of this variable is set to `$xcart_dir."/shipping/FedEx/"`, where `$xcart_dir` is a variable representing the root directory of your X-Cart.

### Log directory

```
$log_dir = "/log";
```

The variable `$log_dir` defines the location of the directory where X-Cart log files are stored. By default, the value of this variable is set to `"/log"`, a directory within the root directory of your X-Cart.

### Cache directory

```
$data_cache_dir = "/cache";
```

The variable `$data_cache_dir` defines the location of the directory where X-Cart cache files are stored. By default, the value of this variable is set to `"/cache"`, a directory within the root directory of your X-Cart.

### Export directory

```
$export_dir = $log_dir;
```

The variable `$export_dir` defines the location of X-Cart export directory (a directory on X-Cart server to which the CSV files of export packs are stored). By default, the value of this variable is set to `$log_dir`, a variable representing X-Cart log directory.

## Correcting debug mode

```
$debug_mode = 2;
```

The variable `$debug_mode` defines the amount of debugging information which is visible on the customer side. By default, the value of this variable is set to 3. Make sure you set this variable value to 2 so that all the debugging information is hidden from the customer.

## SECTION MARKED "DO NOT CHANGE ANYTHING BELOW THIS LINE UNLESS YOU REALLY KNOW WHAT YOU ARE DOING"

We strongly recommend you do not change any configuration settings that go below the line that says:

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

Editing the settings below this line requires profound knowledge of X-Cart architecture. Considerable damage may be done to your store if these settings are tampered with.

However, please be aware that this section contains the following important constants:

### ▪ USE\_DATA\_CACHE

This constant defines whether data caching should be used in your store or not. Admissible values for `USE_DATA_CACHE` are 'true' and 'false'. By default, the value of this constant is set to 'true'. You can set it to 'false' if you experience problems using the store with caching enabled (for example, if you get some kind of error regarding a file in the `/var/cache` directory of your X-Cart installation).

```
define("USE_DATA_CACHE", true);
```

### ▪ SECURITY\_BLOCK\_UNKNOWN\_ADMIN\_IP

This constant allows you to enable a functionality that will prevent usage of your store's back-end from IP addresses unknown to the system. Admissible values for `SECURITY_BLOCK_UNKNOWN_ADMIN_IP` are 'true' and 'false'. By default, the value of this constant is set to 'false'. For more information about `SECURITY_BLOCK_UNKNOWN_ADMIN_IP`, please refer to the chapter [User Access Control](#).

```
define("SECURITY_BLOCK_UNKNOWN_ADMIN_IP", false);
```

### ▪ USE\_SESSION\_HISTORY

This constant allows you to enable synchronization of user sessions on the main website of your store and on domain aliases. Admissible values for `USE_SESSION_HISTORY` are 'true' and 'false'.

**Note:** This constant needs to be set to 'true' if you use a domain alias for your store's Customer zone and need to be able to keep working in your store's back-end without losing your user session after you open the Customer zone of your store in another window of the same browser.

```
define("USE_SESSION_HISTORY", true);
```

### ▪ FORM\_ID\_ORDER\_LENGTH

This constant sets the length for the list of unique form identifiers.

**Note:** Unique form identifiers are used in X-Cart as a means of protection from CSRF (cross site request forgery) attacks. Unique form identifiers are unique identifiers generated within a user session and assigned to each X-Cart's page that is loaded in the user's browser and contains an HTML form intended for submitting input data via the POST method. The main purpose of form identifiers is to ensure authenticity of the form when the form is submitted by the user: if the submitted form contains a valid form identifier, the form is believed to be generated by X-Cart in the current user's session and, thus, valid and safe for use; if there is no valid form identifier, the form is treated as suspicious and the submit process is canceled. X-Cart keeps an ordered list of identifiers of forms opened by a user successively within one user session. All the form identifiers stored in this list are considered valid. The length of the list (the number of form identifiers that can be stored in the list) corresponds to the value of the constant FORM\_ID\_ORDER\_LENGTH. As the number of forms opened by the user in one session exceeds the value defined by FORM\_ID\_ORDER\_LENGTH, the form identifiers that were entered into the list earliest are removed from the list giving way to the identifiers of the most recently opened forms. Thus, even the forms that were originally valid lose validity after the user opens a number of form pages defined by the constant FORM\_ID\_ORDER\_LENGTH. In this sense, the constant FORM\_ID\_ORDER\_LENGTH determines, how many form pages a user should be able to open in one user session before X-Cart refuses to submit the very first form he opened in this session, should he try to submit it after opening a number of other forms.

By default, the value of FORM\_ID\_ORDER\_LENGTH is set to 100. If FORM\_ID\_ORDER\_LENGTH is not declared or is set to a non-numeric value or a value less than 1, it's value will be set to 100.

A unique form identifier ensures that a form is valid.

```
define("FORM_ID_ORDER_LENGTH", 100);
```

### FRAME\_NOT\_ALLOWED

This constant allows you to prohibit opening X-Cart in an iFrame. If it is set to 'true' X-Cart will detect that it is being opened in an iFrame and open as the main page instead.

```
define("FRAME_NOT_ALLOWED", true);
```

### SECTION MARKED "NEVER CHANGE THE SETTINGS BELOW THIS LINE MANUALLY"

In config.php, there is a section that says:

```
#####
# NEVER CHANGE THE SETTINGS BELOW THIS LINE MANUALLY
#####
```

Under no circumstances should you try to edit this section, as it will most probably destroy your store.

For example, this section contains the variable \$blowfish\_key. This variable stores your Blowfish encryption key automatically generated by X-Cart during installation. This key is used to encrypt all the sensitive data in your store including user passwords, credit card data, etc.

NEVER try to change your Blowfish encryption key by editing the value of the \$blowfish\_key variable in config.php: your data is already encrypted with this key and X-Cart needs exactly the same key to be able to decrypt it. Changing \$blowfish\_key manually will corrupt all the user passwords (including the

administrator's password), so you will not be able to use the store.

Please be aware that a lost Blowfish key cannot be restored, so X-Cart team will not be able to help you regain access to your store if you remove or change the value of `$blowfish_key`.

It is quite safe to use X-Cart with the Blowfish key generated during installation; however, if you still wish to change it, use the utility for re-generation of the Blowfish encryption key provided with X-Cart tools (For details, refer to the chapter '[Tools](#)' in the 'Maintaining Your Store' section of this manual).

**Note:** The SALT & CODE encryption method which was used for user password and credit card protection in the previous X-Cart versions has been removed in X-Cart 4.1.x and is now fully replaced by the Blowfish Encryption Algorithm.

## top.inc.php configuration file

### Directories structure definitions

```
$xcart_dir = realpath(dirname(__FILE__));
```

The variable `$xcart_dir` defines the location of the directory where X-Cart is installed. By default, the value of this variable is set to `'realpath(dirname(__FILE__))'`, where `__FILE__` is a PHP constant representing the absolute filepath to `top.inc.php`. On certain operating systems the `__FILE__` constant is defined in ways which make it impossible to define the location of your X-Cart installation directory.

*For example*, on SunOS, the `__FILE__` constant for included files contains a relative filepath instead of an absolute one. This causes the value of the `$xcart_dir` variable to be defined as `"/"`, which is wrong.

If a similar problem causes errors on your server (you get error messages that say "Cannot include file"), redefine the value of the `$xcart_dir` variable manually: replace the string `'realpath(dirname(__FILE__))'` by the actual path to your X-Cart installation.

*Example:*

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

### Directories location definition

```
define ('DIR_CUSTOMER', '');  
define ('DIR_ADMIN', '/admin');  
define ('DIR_PROVIDER', '/provider');  
define ('DIR_PARTNER', '/partner');
```

This section allows you to define the location of the directories corresponding to the major areas (zones) of your X-Cart. By default, the scripts of X-Cart Customer zone are located in X-Cart root directory, the scripts of X-Cart Admin and Provider zones – in the `'/admin'` and `'/provider'` directories respectively; in stores where X-Affiliate add-on module is installed there is also a directory named `'/partner'` for the scripts of X-Cart Partner zone. If, for some reason, you want to change the location of your major X-Cart zones, edit

the values of the corresponding constants.

*Example:*

If your X-Cart is installed in /home/user/public\_html/xcart (seen from the Web as <http://www.example.com/xcart>), setting DIR\_CUSTOMER as follows:

```
define ('DIR_CUSTOMER', '');
```

will result in the placement of your X-Cart Customer zone scripts into X-Cart root directory (/home/user/public\_html/xcart), so that your customers will be able to access the Customer zone at <http://www.example.com/xcart>.

Setting DIR\_CUSTOMER as follows:

```
define ('DIR_CUSTOMER', '/customer');
```

will result in the placement of your X-Cart Customer zone scripts into the directory /home/user/public\_html/xcart/customer, so that your customers will be able to access the Customer zone at <http://www.example.com/xcart/customer>.

## 3 Setting Up Your Store

This section provides information about adjusting the configuration of an X-Cart-based store.

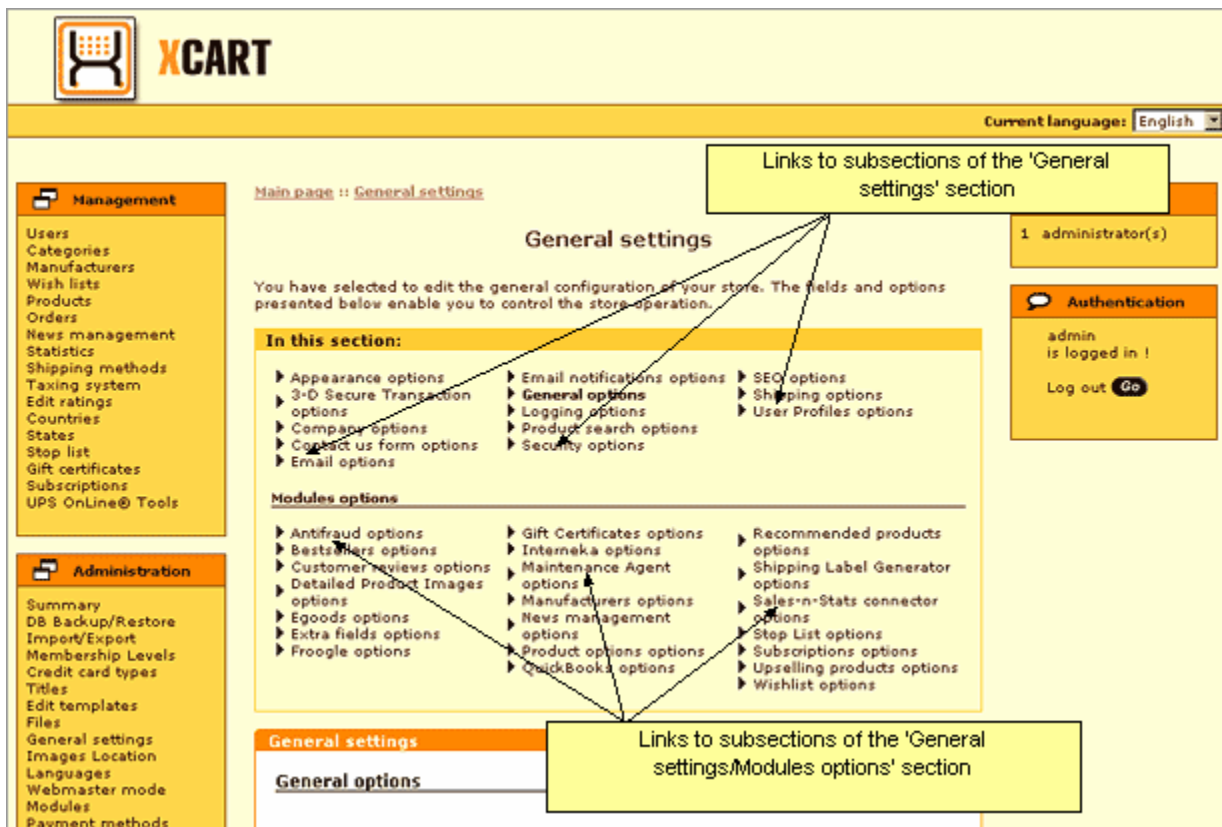
- See [General Settings](#) to find out, how you can adjust the overall configuration of your store.
- Study [Store Security](#) for information on the means of providing security for sensitive data in your store.
- Study [Geographical Settings](#) to find out, how you can adjust your store's geographical settings.
- See [Shipping Settings](#) to familiarize yourself with ways of getting your store to provide calculation of shipping rates to customers.
- Study [Tax Settings](#) to find out, how you can adjust your store to calculate taxes.
- See [Payment Settings](#) to find out, how you can define payment methods that will be supported by your store.
- Check out the chapter [Modules and Add-ons](#) for general information on using X-Cart modules and add-ons.

**Note:** please be sure not to use the ">" and "<" characters when you set up your store and enter your own names for providers, products, categories, etc. These characters are considered tags and are deleted as is everything between them.

### 3.1 General Settings

You can adjust the overall configuration of your store using the 'General settings' section of X-Cart administration back-end ( Administration menu->General settings).

All the configuration settings in this section are divided into subsections. You can use the 'General settings' section menu to switch between the different subsections.



The links in the upper portion of the 'General settings' section menu provide access to the settings which allow you to control X-Cart's general functionality. The links in the lower portion of the 'General settings' section menu provide access to settings which allow you to control options of specific X-Cart modules.

Here's a list of subsections available via the 'General settings' section menu:

- [Appearance options](#) allows you to adjust preferences that affect the overall appearance of your store.
- [3-D\\_Secure\\_Transaction\\_options](#) allows you to enable Cardinal Centinel® payment authentication platform support in your store.
- [Company\\_options](#) allows you to provide your company details and contact information (name, address, phone/fax numbers, email addresses, etc). Your company name, address and phone/fax numbers will be displayed on the storefront and included into customer email notifications. Email addresses of specific departments of your store will be used by X-Cart to send admin and provider notifications. Company address will be used in real-time shipping rate calculations.
- [Contact us form options](#) allows you to configure the 'Contact us' form. You can define, which of the 'Contact us' form fields should be *active* (visible to customers), and completion of which fields should be *required* (mandatory). If necessary, you can also add your own (custom) fields to the 'Contact us' form.
- [Email options](#) allows you to define options that affect sending of email notifications and newsletters.



- [Email notifications options](#) allows you to define, which of the available email notifications should be sent to the customers, administrator(s), provider(s), users department and orders department of your store.
- [General options](#) allows you to adjust the general configuration of your store.
- [Logging options](#) allows you to define what kind of logs you wish to be kept in your store.
- [Product search options](#) allows you to define, which fields should be included into the Product search form in the Customer zone, and set default values for these fields.
- [Security options](#) allows you to adjust options that affect your store security (options that affect encryption methods used in your store, HTTPS options, etc).
- [SEO options](#) allows you to adjust options that can improve your site's ranking with search engines.
- [Shipping options](#) allows you to adjust options that affect the calculation of shipping rates in your store.
  
- [User Profiles options](#) allows you to configure your store's user profile forms. You can define which of the user profile fields should be *active* (included into the user profile forms), and completion of which fields should be *required* (mandatory). If necessary, you can also add your own (custom) fields for use in user profiles.

Information on specific subsections of the 'General settings/Modules options' section comes with descriptions of specific X-Cart [modules](#).

**Note:** Links to the settings of X-Cart modules in the 'General settings/Modules options' section are only visible when the respective modules are enabled.

## 3.1.1 Appearance Options

The 'General settings/Appearance options' page allows you to adjust preferences that affect the overall appearance of your store.

### Pagination options

- Products per page: The maximum number of products which can be displayed on a category page in Customer zone (Remember that pages with a lot of products take longer to load).
- Products per page (admin): The maximum number of products which can be displayed on a Search results page in Admin/Provider zone.
- Orders per page (admin): The maximum number of orders which can be displayed on a Search

results page in Admin/Provider zone.

- Users per page (admin): The maximum number of users which can be displayed on a Search results page in Admin zone.
- Maximum navigation pages: The maximum number of pages which can be displayed in a navigation bar.

## Displaying Products

- Select the order in which products should be displayed within a category: The order in which products are sorted within a category. Sorting by *SKU* arranges products in a category so their SKU numbers increase towards the page bottom (in the case of alphanumeric SKUs, the alphabetic part is also sorted from A to Z); sorting by *Product* arranges products so their names are set out alphabetically; selecting the *Default* order arranges products so their positions within a category are defined by the POS. field values set for specific products; sorting by *Price* arranges products in the order of increasing price.
- Show the number of products in categories: If selected, your customers can see the number of products in each category.
- Show quantity in stock: If enabled, your customers can see the quantity in stock for each product.
- Maximum number of selections in quantity selectbox: The maximum number of items a customer can see in the quantity selectbox for each product (This number corresponds to the largest number of product items which a customer can add to the shopping cart at a time).
- Enable 'Buy Now' button in the products list: If selected, a 'Buy Now' button is added below each product description in the Products list. Customers can use this button to add a product to the shopping cart directly from the Products list without going to the Product details page.
- Display products list in multiple columns (1-3) (leave empty to use standard format): The number of columns (1-3) in which products are arranged in the Products list.
- Display only featured products list in multicolumn format: If selected, multicolumn format is used only for featured products. This option has priority over the option 'Display products list in multiple columns (1-3)', so if you want products in the Products list to be arranged in multiple columns, be sure to unselect the 'Display only featured products list in multicolumn format' check box.
- Show thumbnails in products list: If selected, product thumbnail images are displayed in the Products list. You can unselect this check box to disable thumbnails and, thus, get your store pages to load faster; however, we do not recommend disabling thumbnails in a live store, as most customers

think thumbnails very useful for finding products.

- Thumbnail width in the products list: The width of thumbnails in the Products list (If the width of some of your original thumbnail images is greater than this value, these images will be shrunk to fit the width of the thumbnail column; images with a width smaller than this value will be stretched).
- The section 'Send to friend' on the Product details page is enabled: If selected, your customers can see the 'Send to friend' section on the Product details page of each product and use this section to send information about the product to their friends.
- Display product code (SKU) in the products list: If selected, your customers can see the SKU of each product in the Products list.

## Date / time format

- Select date format: Format that is used for displaying date in all the places in your store where date is displayed.
- Select time format: Format that is used for displaying time in all the places in your store where time is displayed.
- Time difference between shop location and host server location (hours): The time offset between shop location (the location of the store administrative staff responsible for handling orders) and the location of the host server on which X-Cart is installed (a difference in hours expressed as a positive or a negative value; is calculated by subtracting of server time relative to GMT from shop location time relative to GMT). Setting this option allows the store administrative staff to control placement of orders by customers in real time.

## Cart & Checkout

- Display detailed cart totals information: Specifies whether product options are displayed as a product link title *on all checkout pages, on the last checkout page only or never*.
- Allow to update product quantity on the checkout pages: If selected, your customers can edit the quantity of product items in their shopping cart after the beginning of checkout.
- Display costs for all the shipping methods: If selected, an expected shipping cost is displayed next to the name of each shipping method in the 'Delivery method' list on checkout.
- Print order invoices on separate pages: If selected, each order invoice is printed on a separate page when you print multiple invoices. You can unselect this check box to be able to print multiple

invoices on the same page.

## Miscellaneous

- Restore the language of the interface after editing multilingual data: If selected, the original language of administrator back-end is automatically restored as soon as administrator finishes editing multilingual data (like international product descriptions) and leaves for some other place in the store interface. If this check box is unselected, administrator has to reset the interface language manually using the language selector.
- Enable printable version of categories and products pages in customer area: If selected, a printer-friendly version of category and product pages is available to your customers.
- Input and display format for floating comma numbers: Allowed format for input and display of floating comma numbers.

### 3.1.2 3-D Secure Transaction options

The 'General settings/3-D Secure Transaction options' page allows you to enable Cardinal Centinel® payment authentication in your store.

- Use Cardinal Centinel® for 3-D Secure Payer Authentication: An option allowing you to enable/disable Cardinal Centinel® payment authentication functionality in your store (If selected, 3-D Secure Payer Authentication is enabled).
- ProcessorID: A ProcessorID value provided to you by CardinalCommerce.
- MerchantID: A MerchantID value provided to you by CardinalCommerce.
- TransactionURL: A TransactionURL provided to you by CardinalCommerce.
- Current currency: The currency your online store uses to conduct transactions.

### 3.1.3 Company Options

The 'General settings/Company options' page allows you to provide your company details and contact information.

## Company details

- **Company name:** Name of your company as it will appear on the invoice.

**Note:** In versions below 4.1.3, the value of this option does not affect the website title. To replace the original 'Your Company Name' dummy, which appears in the title bar of the browser and in the breadcrumb navigation bar (location.tpl), edit the value of the language variable `lbl_site_title` (Administration menu->Languages).

In versions 4.1.3 and above, by default, the value of the 'Company name' option is used both as the Company name and the site title. If you wish to have different values for your Company name and site title, set the `lbl_site_title` variable to define the site title.

- **Company website:** Address (URL) of your company website.
- **Year when the store started its operation:** Since when your company is in business.

## Company contacts

- **Company phone:** Phone number which your customers should use to contact your company.
- **Company phone 2:** An alternative phone number.
- **Company fax:** Company fax number.

## Company location address

- **Company address:** Street address of your company.
- **Company city:** City of your company location.
- **Company state:** State of your company location.
- **Company zip/postal code:** Zip/postal code of your company location.
- **Company country:** Country of your company location.

## Company e-mails

- **Site administrator e-mail address:** Email address of the site administrator.
- **Users department e-mail address:** Email address of the users department.
- **Orders department e-mail address:** Email address of the orders department.
- **Help/Support department e-mail address:** Email address of the help and support department.

## 3.1.4 Contact Us Form Options

X-Cart provides a form that allows users to submit messages to the store's Help/Support department - the so-called 'Contact us' form.

**Note:** The email address for your store's Help/Support department can be specified in the 'General settings/Company options' section.

This form is available to customers (X-Cart GOLD and PRO), providers (X-Cart PRO) and partners (X-Cart GOLD and PRO using X-Affiliate add-on module) via the Help menu.

The 'General settings/Contact us form options' page allows you to configure the set of fields that should be included into the 'Contact us' form for each type of users.

### Configuring the set of fields included into the 'Contact us' form

You can define, which of the 'Contact us' form fields should be *active* (visible to the user), and completion of which fields should be *required* (mandatory). Required fields will be marked by a red asterisk (\*) sign so the user knows they are mandatory for completion; a special validation routine will ensure that all the required fields are completed by the user before the form is submitted.

To configure the 'Contact us' form field set:

1. Select the check boxes in the 'Active' column opposite the names of the fields you want to be available for completion.
2. Select the check boxes in the 'Required' column opposite the names of the fields you want to be mandatory for completion.
3. Click the **Save** button below the list of 'Contact us' form fields to apply the changes.

### Adding custom fields to the 'Contact us' form

If the field set for the 'Contact us' form provided by X-Cart does not meet all of your needs, you can add your own fields to the 'Contact us' form.

To add a custom field to the 'Contact us' form:

1. Scroll down to the 'Additional fields' section of the 'General settings/Contact us form options' page.

2. Use the input box in the FIELD NAME column of the 'Add new field' subsection to enter a name for the field you wish to add.
3. Use the drop-down box in the TYPE column of the 'Add new field' subsection to select a type of field that needs to be added (*Text, Check box or Selectbox*)
4. If you have chosen the *Selectbox* type, provide variants for the selectbox (use the ';' symbol as a delimiter).
5. (*Optional*) Use the field in the POS. column to enter a position number of the field being created relative to the other additional fields (if any).
6. Click the **Add/Update button** at the bottom of the form to save the changes. The new field should be added to the list of fields in the 'Additional information' section.
7. Select the 'Active' and (optionally) 'Required' check box(es) opposite the newly added field.
8. Click the **Save** button below the list of 'Contact us' form fields to apply the changes.

### 3.1.5 Email Options

The 'General settings/Email options' page allows you to define options that affect sending of email notifications and newsletters.

#### Basic email options

- HTML mail: If selected, email notifications are sent in the form of HTML mail.
- Encode mail headers using "Base 64": If selected, mail headers are encoded with "Base 64" for correct presentation in mail clients.
- Use internal PHP mailer for sending newsletters: If selected, an internal PHP mailer is used for sending newsletters. You can unselect this check box to use the external admin/newsletter.sh mailer. When the number of newsletter subscribers is large, using the external mailer is recommended.

**Note:** Using the external mailer is possible on Unix systems only.

#### Email content options

- Include order details (credit card information) into admin order notification message (it is recommended to use PGP encryption with this option enabled): If selected, your customers'

credit card information is included into admin order notifications.

- Include user password in e-mail notifications to the Users department: If selected, user passwords are included into email notifications sent to the users department.
- Maximum string length: Maximum number of characters which can be displayed on a line in the first column of a plain text email notification with a two-column layout. If a field name that needs to be displayed in the first column is longer than the maximum string length value, it is truncated (like 'First Name' would be truncated to 'First N...' if you set the maximum string length to 10).

## SMTP options

It is a requirement with some ISPs that all mail from your store (email notifications, news messages, etc) should be sent through an SMTP server. For your X-Cart store, this means that an authentication step will be involved in the process of sending mail. X-Cart will need to log in to the SMTP server allowing the SMTP-AUTH extension to identify it as an authorized sender. To enable your X-Cart store to pass SMTP authentication automatically whenever an email message is sent from it, configure the options in this section.

- Use SMTP server instead of internal PHP mailer: Select this option to enable X-Cart to use an SMTP server (When this option is unselected, X-Cart uses the internal PHP mailer).
- SMTP server: Host name of the SMTP server that your X-Cart needs to use (like mail.example.com, smtp.example.com, etc)
- SMTP port: Port that needs to be used to connect to the SMTP server. By default, 25.
- SMTP "MAIL FROM" email address: Sender email address that will be specified in the SMTP envelope 'From' field in all messages sent from X-Cart. Please note that it is not the email address that the recipients of the message will be able to see as the address of the sender, but the address by which the SMTP server will be able to identify your store as an authorized sender. If this option is not set, X-Cart will attempt to use Site administrator email address defined in General settings/Company options.
- SMTP AUTH username and SMTP AUTH password: Username and password that need to be used for SMTP authentication.
- SMTP AUTH method: Method of SMTP authentication to be used. The following methods are supported by X-Cart: PLAIN, LOGIN, CRAM-MD5 and DIGEST-MD5. You need to select a method supported by the SMTP server that X-Cart will use. If you are not sure, which method to choose, you may just leave this option set to default (*Automatically select best method*); in this case, X-Cart will



automatically check, what methods are supported, and will choose the most secure one.

### 3.1.6 Email Notifications Options

The 'General settings/Email Notifications options' page allows you to define, which of the available email notifications should be sent to the customers, administrator(s), provider(s), users department and orders department of your store.

#### Site administrator notifications

Select all the notifications that you wish to be sent to the store administrator:

- Notify the site administrator by email if unallowed request to site occurs: If selected, the store administrator gets 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).

Plain text mail templates for this notification	HTML mail templates for this notification
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- Notify the site administrator about SQL errors in the store by email: If selected, the store administrator gets notifications about any SQL errors that occur in the store.

Plain text mail templates for this notification	HTML mail templates for this notification
--	--

- Login error notification to site administrator: If selected, the store administrator gets an email notification if somebody tries to log in to the store as administrator with a password that does not match the actual administrator password.

Plain text mail templates for this notification	HTML mail templates for this notification
mail/login_error.tpl	mail/html/login_error.tpl
mail/mail_header.tpl	mail/html/mail_header.tpl
mail/signature.tpl	mail/html/signature.tpl
mail/login_error_subj.tpl	

## Orders department notifications

Select all the notifications which you want to be sent to the orders department of your store:

- Enable email notifications for orders department/providers about initially placed orders: If selected, a notification is sent to the store orders department/providers when an order gets initially placed. An order is considered *initially placed* when a customer goes to an online payment processor to pay for the order using an online payment method and the order gets the status 'I' (Not finished) - the transaction is neither failed nor successful yet.

Plain text mail templates for this notification	HTML mail templates for this notification
<p>Orders department notification:</p> <p>mail/order_notification_admin.tpl</p> <p>mail/mail_header.tpl</p> <p>mail/order_invoice.tpl</p> <p>main/order_status.tpl</p> <p>mail/order_data.tpl</p> <p>mail/signature.tpl</p> <p>mail/init_order_notification_subj.tpl</p> <p>Provider notification:</p> <p>mail/order_notification.tpl</p> <p>mail/mail_header.tpl</p> <p>mail/order_invoice.tpl</p> <p>main/order_status.tpl</p> <p>mail/order_data.tpl</p> <p>mail/signature.tpl</p> <p>mail/init_order_notification_subj.tpl</p>	<p>Orders department notification:</p> <p>mail/html/order_notification_admin.tpl</p> <p>mail/html/mail_header.tpl</p> <p>mail/html/order_invoice.tpl</p> <p>main/order_status.tpl</p> <p>mail/html/order_data.tpl</p> <p>mail/html/signature.tpl</p> <p>Provider notification:</p> <p>mail/html/order_notification.tpl</p> <p>mail/html/mail_header.tpl</p> <p>mail/html/order_invoice.tpl</p> <p>main/order_status.tpl</p> <p>mail/html/order_data.tpl</p> <p>mail/html/signature.tpl</p>

- Enable email notifications to the orders department about placed orders: If selected, an email notification is sent to the orders department of your store when an order gets placed.

Plain text mail templates for this notification	HTML mail templates for this notification
mail/order_notification_admin.tpl	mail/html/order_notification_admin.tpl
mail/mail_header.tpl	mail/html/mail_header.tpl
mail/order_invoice.tpl	mail/html/order_invoice.tpl
main/order_status.tpl	main/order_status.tpl
mail/order_data.tpl	mail/html/order_data.tpl
mail/signature.tpl	mail/html/signature.tpl
mail/order_notification_subj.tpl	

- 'Order is processed' notification to orders department: If selected, a notification is sent to the orders department of your store when an order gets processed.

Plain text mail templates for this notification	HTML mail templates for this notification
mail/order_notification.tpl	mail/html/order_notification.tpl
mail/mail_header.tpl	mail/html/mail_header.tpl
mail/order_invoice.tpl	mail/html/order_invoice.tpl
main/order_status.tpl	main/order_status.tpl
mail/order_data.tpl	mail/html/order_data.tpl
mail/signature.tpl	mail/html/signature.tpl
mail/order_notification_subj.tpl	

- Low limit warning to orders department: If selected, a low limit warning message is sent to the orders department when the quantity in stock of any of the products reaches the 'low limit'.

Plain text mail templates for this notification	HTML mail templates for this notification
mail/lowlimit_warning_notification_admin.tpl	mail/html/lowlimit_warning_notification_admin.tpl
mail/mail_header.tpl	mail/html/mail_header.tpl
mail/signature.tpl	mail/html/signature.tpl
mail/lowlimit_warning_notification_subj.tpl	

## Users department notifications

Select all the notifications which you want to be sent to the users department of your store:

- 'Profile is created' notification to users department: If selected, a notification is sent to the users

department when a new user profile gets created.

Plain text mail templates for this notification	HTML mail templates for this notification
mail/signin_admin_notification.tpl	mail/html/signin_admin_notification.tpl
mail/mail_header.tpl	mail/html/mail_header.tpl
mail/profile_data.tpl	mail/html/profile_data.tpl
mail/signature.tpl	mail/html/signature.tpl
mail/signin_admin_notif_subj.tpl	

- 'Profile is modified' notification to users department: If selected, a notification is sent to the users department when a user profile gets modified.

Plain text mail templates for this notification	HTML mail templates for this notification
mail/profile_admin_modified.tpl	mail/html/profile_admin_modified.tpl
mail/mail_header.tpl	mail/html/mail_header.tpl
mail/profile_data.tpl	mail/html/profile_data.tpl
mail/signature.tpl	mail/html/signature.tpl
mail/profile_admin_modified_subj.tpl	

- 'Profile is deleted' notification to users department: If selected, a notification is sent to the users department when a user profile gets deleted.

Plain text mail templates for this notification	HTML mail templates for this notification
mail/profile_admin_deleted.tpl	mail/html/profile_admin_deleted.tpl
mail/mail_header.tpl	mail/html/mail_header.tpl
mail/profile_data.tpl	mail/html/profile_data.tpl
mail/signature.tpl	mail/html/signature.tpl
mail/profile_admin_deleted_subj.tpl	

## Provider notifications

Select all the notifications which you want to be sent to the store provider(s):

- Send e-mail notifications about placed orders to providers who uploaded the purchased products (in addition to the orders department): If selected, when an order gets placed, notifications are sent not only to the orders department, but also to individual providers who own the

products included into the order.

Plain text mail templates for this notification	HTML mail templates for this notification
mail/order_notification.tpl	mail/html/order_notification.tpl
mail/mail_header.tpl	mail/html/mail_header.tpl
mail/order_invoice.tpl	mail/html/order_invoice.tpl
main/order_status.tpl	main/order_status.tpl
mail/order_data.tpl	mail/html/order_data.tpl
mail/signature.tpl	mail/html/signature.tpl
mail/order_notification_subj.tpl	

- 'Order is processed' notification to provider: If selected, a notification is sent to the provider when an order gets processed.

Plain text mail templates for this notification	HTML mail templates for this notification
mail/order_notification.tpl	mail/html/order_notification.tpl
mail/mail_header.tpl	mail/html/mail_header.tpl
mail/order_invoice.tpl	mail/html/order_invoice.tpl
main/order_status.tpl	main/order_status.tpl
mail/order_data.tpl	mail/html/order_data.tpl
mail/signature.tpl	mail/html/signature.tpl
mail/order_notification_subj.tpl	

- Low limit warning to provider: If selected, a notification is sent to the provider when the quantity in stock of any of his products reaches the 'low limit'.

Plain text mail templates for this notification	HTML mail templates for this notification
mail/lowlimit_warning_notification_admin.tpl	mail/html/lowlimit_warning_notification_admin.tpl
mail/mail_header.tpl	mail/html/mail_header.tpl
mail/signature.tpl	mail/html/signature.tpl
mail/lowlimit_warning_notification_subj.tpl	

## Customer notifications

In X-Cart, customers get an email notification when their order gets successfully placed with the status 'Q'

(Queued). The look and content of such email notifications is defined by these templates:

Plain text mail templates for this notification	HTML mail templates for this notification
mail/order_customer.tpl	mail/html/order_customer.tpl
mail/mail_header.tpl	mail/html/mail_header.tpl
mail/order_invoice.tpl	mail/html/order_invoice.tpl
main/order_status.tpl	main/order_status.tpl
mail/order_data.tpl	mail/html/order_data.tpl
mail/signature.tpl	mail/html/signature.tpl
mail/order_customer_subj.tpl	

In addition to notifications about orders getting queued, you can enable other email notifications for customers. Select all the customer notifications which you want to be sent:

- Enable email notifications for customers about initially placed orders: If selected, a customer gets a notification when his or her order becomes initially placed. An order is considered *initially placed* when a customer goes to an online payment processor to pay for an order using an online payment method and the order gets pre-placed with the status 'I' (Not finished), which means that the transaction is neither failed nor successful yet.

Plain text mail templates for this notification	HTML mail templates for this notification
mail/init_order_customer.tpl	mail/html/init_order_customer.tpl
mail/mail_header.tpl	mail/html/mail_header.tpl
mail/signature.tpl	mail/html/signature.tpl
mail/init_order_customer_subj.tpl	

- 'Order is processed' notification to customer: If selected, a customer gets a notification when his or her order gets processed (the status 'P').

Plain text mail templates for this notification	HTML mail templates for this notification
mail/order_customer_processed.tpl	mail/html/order_customer_processed.tpl
mail/mail_header.tpl	mail/html/mail_header.tpl
mail/order_data.tpl	mail/html/order_data.tpl
mail/signature.tpl	mail/html/signature.tpl
mail/order_cust_processed_subj.tpl	

- 'Order is completed' notification to customer: If selected, a customer gets a notification when his

or her order gets completed (the status 'C').

Plain text mail templates for this notification	HTML mail templates for this notification
mail/order_customer_complete.tpl	mail/html/order_customer_complete.tpl
mail/mail_header.tpl	mail/html/mail_header.tpl
mail/order_data.tpl	mail/html/order_data.tpl
mail/signature.tpl	mail/html/signature.tpl
mail/order_cust_complete_subj.tpl	

- 'Order is declined' notification to customer: If selected, a customer gets a notification when his or her order gets declined (the status 'D').

Plain text mail templates for this notification	HTML mail templates for this notification
mail/decline_notification.tpl	mail/html/decline_notification.tpl
mail/mail_header.tpl	mail/html/mail_header.tpl
mail/order_data.tpl	mail/html/order_data.tpl
mail/signature.tpl	mail/html/signature.tpl
mail/decline_notification_subj.tpl	

- 'Profile is created' notification to profile owner: If selected, an owner of a user profile gets a notification when his or her user profile gets created.

Plain text mail templates for this notification	HTML mail templates for this notification
mail/signin_notification.tpl	mail/html/signin_notification.tpl
mail/mail_header.tpl	mail/html/mail_header.tpl
mail/profile_data.tpl	mail/html/profile_data.tpl
mail/signature.tpl	mail/html/signature.tpl
mail/signin_notification_subj.tpl	

- 'Profile is modified' notification to profile owner: If selected, an owner of a user profile gets a notification when his or her user profile gets modified.

Plain text mail templates for this notification	HTML mail templates for this notification
mail/profile_modified.tpl	mail/html/profile_modified.tpl
mail/mail_header.tpl	mail/html/mail_header.tpl
mail/profile_data.tpl	mail/html/profile_data.tpl
mail/signature.tpl	mail/html/signature.tpl
mail/profile_modified_subj.tpl	

- 'Profile is deleted' notification to profile owner: If selected, an owner of a user profile gets a notification when his or her user profile gets deleted.

Plain text mail templates for this notification	HTML mail templates for this notification
mail/profile_deleted.tpl	mail/html/profile_deleted.tpl
mail/mail_header.tpl	mail/html/mail_header.tpl
mail/signature.tpl	mail/html/signature.tpl
mail/profile_deleted_subj.tpl	

### 3.1.7 General Options

The 'General settings/General options' page allows you to adjust the general configuration of your store.

#### Common store options

- Check this to close your shop temporarily: Use this option to close the storefront when performing maintenance tasks on your store or making changes to your store's settings/configuration. When this option is selected, no one can access the Customer zone of your store without a special key.

**Important:** You should understand that making changes on a live store without closing the storefront may cause temporary inconsistencies in the store's functioning, which may lead to undesirable consequences. For example, if you change the store's tax or shipping settings while some customers are checking out, these customers may get wrong order totals.

While the store is closed, visitors attempting to view any of the store's pages see a 'shop closed' page (shop\_closed.html). If you wish to use a different HTML page as your 'shop closed' page, edit the [\\$shop\\_closed\\_file](#) variable in the [config.php](#) file of your X-Cart installation.

- Key for access to a temporarily closed shop: A key that can be used to access 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 the Customer zone).

- If ticked, the categories list always shows root categories: If selected, root categories are shown in the Categories menu of the Customer zone regardless of what category level a customer is currently viewing. You can unselect this check box, so the categories list will always show categories available for browsing on the current level.
- Enable default password warning: If selected, a JavaScript warning is displayed to the store users who log in to the store with a password that coincides with the login name. The warning is supposed to be an irritating message that reminds the users of the necessity to change their password.
- Disable anonymous checkout: If selected, checkout is disabled for customers who are not registered/not logged in.
- Moderated sign-up for membership: If selected, customers are allowed to sign up for memberships, and administrator moderates the signup process (reviews each customer's application and decides whether the membership should be granted). As a result, customers become members of this or that group only with administrator's approval. You can uncheck this box if you wish to disable membership sign-up for customers (You will still be able to add them to membership groups besides the default group, but it will be outside of the view of your customers).
- Use counties: If selected, use of counties in your store is enabled.
- Use JavaScript version for state and county selector: If selected, a JavaScript version of the state and county selector is enabled for all the forms where users are required to provide a billing/shipping address. You can leave this check box unselected if you do not wish to use the JavaScript version.

*How it works with JavaScript version:* The JavaScript version of X-Cart's state and county selector provides a mechanism that makes the process of specifying the state/county components of an address more user-friendly.

When a user selects a country from the 'Country' drop-down box in any address form, the JavaScript mechanism ensures that the 'State' drop-down box, from which the user is supposed to select a state, shows not all the states available in the store, but only the states of the country selected from the 'Country' drop-down box. Similarly, in stores that use counties, the list of counties displayed in the 'County' drop-down box includes not all the counties defined in the store, but just the counties of the state selected from the 'State' drop-down box. Please note that the situation described is true only for 1) countries that have their 'has states' check box selected and some states defined; 2) states that have some counties defined. If the user selects a country whose 'has states' box is selected, but for which no states are defined, an input box is provided for the 'State' field, so the customer can type in the name of his or her state manually. If the user selects a country whose 'has states' check box is not selected or

a state that does not have any counties defined, the 'State' and 'County' fields are disabled, respectively.

*How it works with non-JavaScript version:* The 'State' drop-down box provides a list of all the states available in your store (the format of each entry in the list will be 'Country code: State name'). The 'County' drop-down box provides a list of all the counties available in your store in the format 'State name: County name'. Please note that 'has states' check boxes do not affect X-Cart's non-JavaScript state and county selector in any way.

- Redirect customer to cart: If selected, your customers are redirected to the shopping cart page every time they add a product to the shopping cart.
- Return the customer to the dynamic part of the store if the option 'Redirect customer to cart' is disabled and the customer got to the cart page from the HTML-catalog: If selected, a customer who adds a product to the shopping cart from a static HTML catalog page is redirected to the dynamic part of the store. If unselected, the customer is redirected back to the static part of the store.

**Note:** Using this option makes sense only when the option 'Redirect customer to cart' is disabled.

*Reason why you may want to enable this option:* Assuming the option 'Redirect customer to cart' is disabled, customers do not get onto their personal cart page after adding a product to cart. When a customer cannot go to the cart page, the only way for him or her to find out how many product items are currently contained in the shopping cart is by looking at the product items counter in the 'Your cart' menu box. As the number of product items displayed in the 'Your cart' menu box can be updated only in a dynamic store, it makes sense to redirect customers to the dynamic part so they can see the updated number of items in their shopping cart.

*Reason why you may want to disable this option:* Load on the server where your store is installed can be reduced by having customer activity related to browsing categories and products relocated to the static part of your store (thus relieving the PHP and MySQL).

- Allow searching by individual words of a search phrase: If selected, store users (including customers) can specify whether the results returned by a product search should match 'All words', 'Any word' or the 'Exact phrase' of the search pattern. You might want to disable this option if you wish to reduce load on your MySQL server. With this option disabled, search results will include only exact matches of the search pattern.

## Default (anonymous) customer options

- Default country: A country used as the country of residence of the default customer and displayed by default in the 'Country' field of user registration/user profile forms.

- **Default zipcode:** A zip/postal code used as the zip/postal code of the default customer.
- **Default state:** A state used as the state of residence of the default customer.
- **Default city:** A city used as the city of residence of the default customer.
- **When a customer isn't logged in, it is presumed that he is from the default country:** If selected, the location defined by the values of the 'Default country/zipcode/state/city' fields is regarded as the place of residence of any anonymous customer. As a result, customers can get an estimate of shipping and tax costs for their orders even when they are not registered or not logged in. (For an anonymous customer, a shipping cost is calculated based on the shipping rate defined for the destination zone that includes the default customer location and the shipping method selected by the customer from the list of methods available for the default customer location; an applied tax is calculated based on the destination zone that includes the default customer location).

## General parameters

- **Primary currency symbol:** A symbol that is used in your store to denote the type of money in which prices are expressed.
- **Alternative currency symbol (empty to disable).** Note that credit card charges are made using primary currency: A symbol that is used in your store to denote an alternative type of money in which prices may be expressed. If specified, all the prices in your store appear twice: first in the currency defined as primary and then in the currency defined as alternative.

**Note:** If you specify an alternative currency symbol, be sure to set an alternative currency exchange rate further in this section.

If you do not wish to use an alternative currency, leave the 'Alternative currency symbol' field blank.

- **Alternative currency exchange rate:** A conversion rate that is used by X-Cart to convert prices expressed in the primary currency to prices expressed in the alternative currency.
- **Weight symbol:** A symbol that is used in your store to denote a unit of weight (like *lbs*, *kg*, etc.)
- **Grams in the unit of weight defined by the weight symbol:** A number of grams in the unit of weight used in your store (X-Cart needs this value to be able to convert weights expressed in the units of weight specified in the 'Weight symbol' field to the units of weight used by specific shipping services like U.S.P.S, FedEx, etc).

## Purchase limitations

- Minimum allowed order subtotal: The minimum subtotal amount with which an order is accepted by your store (Customers are not allowed to place orders with a subtotal smaller than this value).
- Maximum allowed order subtotal (0 means no maximum limit): The maximum subtotal amount with which an order is accepted by your store (Customers are not allowed to place orders with a subtotal greater than this value).
- Maximum allowed total quantity of products in an order (0 means no maximum limit): The maximum number of product items a customer is allowed to order at a time (regardless of product titles). For example, if you set this value to 5, and a customer of yours attempts to order three books and three CDs, he or she will not be allowed to place the order.

## Inventory options

- Disable inventory tracking: If selected, tracking of the number of product items in stock is disabled. You might want to disable inventory tracking only if the number of items in stock is *unlimited* for all the products in your store.
- Disable products which are out of stock: If selected, products which are out of stock are not shown to customers.

## Payment options

- Do not ask customers to enter CC information while getting registered: If selected, customers are not offered to provide their credit card information at the time of registration (The 'Credit card information' section in the user registration form is disabled).

**Note:** Enabling this option is strongly *recommended*.

- Enable 'Issue Number' and 'Valid from' fields in the CC info form: If selected, 'Issue No.' and 'Valid from' fields are included into the 'Credit card information' section.
- Display CVV2 input box at the last stage of checkout if Manual CC processing is used: If selected, an input box for CVV2 is included into the 'Credit card information' section when manual credit card processing is used.
- Enable Credit Card info validation: If selected, a special validation routine performs a preliminary check of compliance of the credit card number, CVV2 and expiration date provided by a customer with several different formatting rules.

## Miscellaneous

- **Enable debugging console:** If selected, X-Cart's debugging console is enabled. X-Cart's debugging console is a tool that can show the hierarchy of templates on any of the store pages and, when Webmaster mode is enabled, can help you find specific templates. You can enable this option when customizing the look and feel of your store; be sure to disable the debugging console as soon as you finish editing the store templates.
- **Enable tracking statistics:** If selected, X-Cart gathers tracking statistics for your store ('Top paths through site', 'Top page views' and 'Shopping cart conversion funnel' sections are added to the 'Statistics' section of the administration back-end of your store).
- **Parse Smarty tags in the content of embedded static pages:** If selected, you can use Smarty tags in your embedded static pages. As a result, static pages using Smarty tags are treated not just as plain HTML pages, but as templates.
- **The full path to Perl interpreter executable (e.g. WIN32: 'd:\perl\bin\perl.exe'; UNIX: '/usr/bin/perl' or leave this field empty):** A full path to the Perl binary; set this value to be able to perform X-Cart upgrades on Windows operating systems.
- **Preferred HTTPS module (if not found the first available module will be used):** An HTTPS module that you wish to use for sending HTTPS queries (Net::SSLey, CURL, libCURL, Open SSL executable, HTTPS-cli executable). Make sure the desired module is installed on the server.

**Tip:** To find out what HTTPS modules are installed, refer to the 'Environment info' section of the Summary page in the administration back-end (Administration menu->Summary).

If the module selected to be *preferred* is unavailable, X-Cart uses the first available HTTPS module that it can find.

- **Display all dialogs for product editing on one page:** If selected, all the dialog boxes pertaining to product modification ('Product details', 'International descriptions' and - depending on the set of enabled modules - all the other dialog boxes used for adjusting additional product features, like 'Product options', 'Detailed images', etc) appear on the same page.

## 3.1.8 Logging Options

X-Cart allows you to keep logs of different kinds of events which occur in your store (like operations on products and orders, or errors in receiving real-time shipping rates). It can also send email messages to

notify you about events which occur in the store while you're away.

The 'General settings/Logging options' page provides a list of event types which can be identified by X-Cart and allows you to define how each of these event types must be handled.

At present, the event types which can be identified by X-Cart include the following:

- Backup/restore database - database backups and restorations;
- File operations via the store interface (upload, copy, delete) - file operations performed using X-Cart interface;
- Order deletion - removal of orders;
- Order status modification - order status updates;
- Orders export - instances of orders export;
- Product deletion - removal of products;
- Errors in receiving realtime shipping rates - errors of realtime shipping modules;
- Online payment processing errors - errors that occur during online payment transactions;
- Debug messages - debug messages.

The drop-down box opposite each of the event types provides four options: *do nothing*, *log only*, *email only*, *log and email*. To define logging options for your store, adjust the values of all the drop-down boxes so they define which of the actions must be performed by the system with regard to each specific event type.

### 3.1.9 Product Search Options

The 'General settings/Product search options' page allows you to define, which fields should be included into the product search form for customers, and (*optionally*) to set default values for these fields.

To adjust the product search form field set:

1. Select the check boxes in the ACTIVE column opposite the names of the fields which you wish to be included into the search form. Activate:
  - Category field to enable search by categories;
  - Price field to enable search by price range;
  - Weight field to enable search by weight range.
  - (*if you are using X-Cart's Extra Fields module*) any extra fields to enable search by these extra fields.
2. (*Optional*) Set default values for the active fields (values that will be displayed in these fields by default).

3. Click on **Save**.

## 3.1.10 Security Options

The 'General settings/Security options' page allows you to adjust options that affect your store security (options that affect encryption methods used in your store, HTTPS options, etc) and to test the encryption of data by PGP/GnuPG.

### General security options

- Order emails encryption method: Method that you wish to be used for encrypting order emails.
- Comma separated list of file extensions disallowed for uploading: A comma separated list of disallowed file extensions (For example, php, pl, cgi, asp, exe, com, bat, pif). Uploading onto the server of files with these extensions will not be possible.
- Check if payment gateway response is coming from the IP's specified here (enter a comma separated list): A comma separated list of IP addresses from which payment gateway responses can be accepted.
- Blowfish encryption method is enabled: Enabling this option enables Blowfish encryption for order details. As soon as you select the check box and click the **Save** button, you are redirected to a page where you are offered to create a Merchant key - a password which is used by X-Cart to encrypt and decrypt order details using Blowfish encryption method. After you create a Merchant key, all the order details in your store are re-encrypted using this new key.

**Important:** You will be supposed to enter your Merchant key as a password every time you try to access order details. Make sure you keep your Merchant key in a secure place. If you forget your Merchant key, all the order details stored in your database will be lost, as you will not be able to decrypt them. Please also be aware that the 'Blowfish encryption method is enabled' option cannot be disabled without a valid Merchant key.

- Check MD5 of compiled templates for better store protection at a shared hosting: If selected, a special routine checks if MD5 checksums of the compiled templates of pages served to a user's web browser match the authentic checksums for these templates. If the sums for a certain compiled template do not match, the template is discarded and compiled anew. Compiled templates whose MD5 checksum does not match the authentic one are considered potentially harmful: the detected checksum mismatch indicates that the PHP code of such templates has been altered and may possibly contain malicious code.

**Note:** Enabling this option is recommended if your X-Cart is installed at a shared (public) hosting.

## HTTPS options

- Use HTTPS for users' login and registration: If selected, existing users log in to the store and new users get registered using HTTPS.
- Use secure login form on a separate page (HTTPS): If selected, your store's authorization pages will provide links to special secure login pages allowing users to log in to the store using HTTPS.
- Do not redirect customers from HTTPS to HTTP: If selected, customers use HTTPS all the time while using your store. You can unselect this check box if you want to enable redirection of customers to HTTP for pages where security is not required.

## PGP options

- Home path: Path to PGP home directory (a directory where PGP configuration file and keyrings are stored).

**Note:** All the files in PGP home directory must be owned by the user under which PGP is running (usually Web server) and must have UNIX 0600 permissions. The directory itself must have 0700 permissions.

- PGP binary path: Path to PGP executable.
- PGP user id: Your user ID (an ASCII string used to identify a user).
- PGP public key: Public key that will be used to encrypt your data (After you paste your public key into this field and click the **Save** button, the key will be added to your public keyring).
- Use PGP version 6: Selecting this check box enables you to use PGP version 6.

## GnuPG options

- Home path: Path to GnuPG home directory.
- GnuPG binary path: Path to GnuPG executable.
- GnuPG user id: Your user ID.
- GnuPG public key: Public key that will be used to encrypt your data.

## P3P options



This section allows you to define your store's privacy policy. P3P enabled web browsers will use the information provided in this section to decide how to interact with your store site. For example, Microsoft Internet Explorer 6 can compare your store's privacy policy with the user's stored preferences to decide whether or not to allow cookies from your store site.

- P3P compact policy data: Your store's compact privacy policy (will be included in the HTTP header).
- P3P policy reference file url (leave empty if not used): URL of your store's P3P policy reference file.

**Note:** More information about P3P is available at W3C P3P site (<http://www.w3.org/P3P/>).

## Test data encryption

This section allows you to test whether PGP/GnuPG encryption is working correctly. For details, see the chapter [PGP/GnuPG](#) of this manual.

## 3.1.11 SEO Options

The 'General settings/SEO options' page allows you to adjust options that can improve your site's ranking with search engines.

- Site META description: A general description of your site.
- Site META keywords: A list of META keywords for the site in general.

The keywords we enter into these two fields is included into the meta-tags of each page of customer zone.

- Include categories' META data into the site meta tags: If selected, categories' META data are included into the site META description and META keywords sections together with the site META description and META keywords, common for all the customer zone pages. If this option is left disabled, the contents of the corresponding fields is not used anywhere, so there is no need to complete them.
- Include products' META data into the site meta tags: If selected, products' META data are included into the site META description and META keywords sections together with the category and site META description and META keywords. There are no special fields for products' META data, so the following is used as product's META data:
  - as META description: product short description;
  - as META keywords: product title and its short description.

On category pages only category META data are present, the data of products included into this category are omitted.

Products META data are used on product.php pages only (pages like product details) and not included into the product lists (for example, product search results).

- Page title format: A format of page titles that is used for all pages in your store.
- Maximum length of page title element (leave 0 or empty if not applicable): The maximum number of characters which can be shown in a page title. If the actual number of characters in the page title is greater than the number set by this option, the title is truncated. Please note that the truncation does not split words. For example, if this option is set to 50, and the fiftieth character happens to be in the middle of a word, X-Cart moves back to the nearest space character after the end of the last full word before the fiftieth character and cuts off everything that goes after the end of this word beginning with the space character. This mechanism ensures that page titles do not include partial words.

### 3.1.12 Shipping Options

The 'General settings/Shipping options' page allows you to adjust options that affect the calculation of shipping rates in your store.

#### General shipping options

- DISABLE SHIPPING: If selected, a customer is not offered to select a shipping method during checkout, and shipping cost is not calculated.
- Enable all shipping methods even if a customer is not logged in: If selected, all available shipping methods are shown not only to customers who are logged in, but also to anonymous customers.
- Do not calculate shipping rates for products with defined shipping freight: If selected, shipping rates for products with a defined shipping freight are not calculated.
- Do not require selection of delivery method for products with free shipping: If selected, a list of shipping methods is not displayed on checkout to customers whose order contains only ESD products ([Egoods](#)) or products with free shipping.
- List of shipping methods available for an order that contains (in addition to products with non-free shipping) some products with free shipping should be defined based on the weight of the entire order (weight of the products with free shipping included): One of the parameters defining whether a certain shipping method should be entered into the list of shipping methods available for an order is weight: the shipping method is displayed as available only if the weight

of the order does not exceed the weight limit defined for this shipping method. The option 'List of shipping methods available for an order...' defines whether the weight of the products with free shipping contained in an order should be taken into account when calculating the weight of the order. If this option is selected, the weight of the order is calculated as a sum of weights of both the products with non-free shipping and the products with free shipping contained in it. If this option is unselected, the weight of the order is calculated as the sum of weights of just the products with non-free shipping (the weight of the products with free shipping is excluded).

**Note:** This option works only when the option 'Do not require selection of delivery method for products with free shipping' is disabled.

*Example:*

You have two shipping methods:

Method name	Weight limit
Method 1	0.00 - 1.00 lbs
Method 2	0.00 - 5.00 lbs

A customer's order contains two products: Product X and Product Y, each weighing 1 lb. Product X has free shipping.

If the option 'List of shipping methods available for an order...' in your store is selected, on checkout the customer is offered just one shipping method - *Method 2*. That is because the total weight of the order is calculated as 2 lbs, and 2 lbs do not fit in the weight limit for *Method 1*.

If the option 'List of shipping methods available for an order...' is unselected, the customer is offered two shipping methods - both *Method 1* and *Method 2*. That is because the total weight of the order is calculated as 1 lb (the weight of Product X is not taken into account), and the weight of 1 lb fits in the weight limit for both the methods.

## Real-time shipping options

- **Enable real-time shipping calculation:** If selected, real-time shipping calculation is enabled.

**Note:** If you choose to enable real-time shipping calculation, be sure to provide the actual address of your company (the location from which product items will be shipped) in General settings/Company options.

- **Use Intershipper calculation services:** If selected, UPS, USPS and FedEx real-time shipping rates will be obtained by your store via Intershipper.

**Note:** If you choose not to enable Intershipper support, X-Cart will use its own integrated modules to obtain shipping rates from UPS, USPS and FedEx.

## Intershipper, U.S.P.S, CanadaPost and DHL/Airborne account details

The fields in the 'account details' sections allow you to provide details for access to your account(s) with Intershipper, U.S.P.S., CanadaPost, DHL/Airborne and FedEx real-time shipping calculation services.

## Test Realtime Shipping Rates Calculation

This section allows you to test real-time shipping rate calculation.

### 3.1.13 User Profiles Options

The 'General settings/User Profiles options' page allows you to configure the set of fields included into your store's user profile forms ('Profile details' forms used by different types of X-Cart users - *administrators, providers, customers* and X-Affiliate *partners* - to provide information about themselves).

#### Configuring the set of fields included into your store's user profile forms

You can define which of the user profile fields should be active (included into the user profile forms), and completion of which fields should be *required* (mandatory). Required fields will be marked by a red asterisk (\*) sign so the store users know they are mandatory for completion; a special validation routine will ensure that all the required fields are completed by a user before the form is submitted.

To configure the set of fields included into your store's user profile forms:

1. Select the check boxes in the 'Active' column opposite the names of the fields you want to be available for completion.
2. Select the check boxes in the 'Required' column opposite the names of the fields you want to be mandatory for completion.
3. Click the **Save** button below the list of user profile form fields to apply the changes.

#### Adding custom fields to a user profile form

If the set of fields for user profile forms provided by X-Cart does not meet all of your needs, you can create your own fields for use in user profiles.

To add a custom field for use in a 'Profile details' form:

1. Select the language you want to be used in the newly created profile field from the 'Current language' drop-down box at the top right of the page.
2. Scroll down to the 'Additional fields' section of the 'General settings/User Profiles options' page.
3. Use the input box in the FIELD NAME column of the 'Add new field' subsection to enter a name for the field you wish to add.
4. Use the drop-down box in the SECTION column of the 'Add new field' subsection to select a section of the user profile form to which the new field must be added (*Shipping Address, Billing Address, Personal Information, Contact Information or Additional Information*).
5. Use the drop-down box in the TYPE column of the 'Add new field' subsection to select a type of field that needs to be added (*Text, Check box or Selectbox*)
6. If you have chosen the *Selectbox* type, provide variants for the selectbox (use the ';' symbol as a delimiter).
7. (*Optional*) Use the field in the POS. column to enter a position number of the field being created relative to the other additional fields (if any).
8. Click the **Add/Update** button at the bottom of the form to save the changes. The new field should be added to the list of fields in the 'Additional information' section.
9. Select the 'Active' and (*optionally*) 'Required' check box(es) opposite the newly added field.
10. Click the **Save** button below the list of 'Contact us' form fields to apply the changes.

## 3.2 Store Security

This section provides an overview of measures you can take to ensure a safe shopping experience for your customers.

- Study the chapter [User Access Control](#) to find out how you can forbid access to your store's back-end from unauthorized IP addresses.
- Study the chapter [Blowfish](#) to learn how you can protect order information in your store.
- See the chapter [PGP/GnuPG](#) for information on using PGP encryption for X-Cart's email notifications.
- Refer to the chapter [3-D. Secure. Payment Authentication](#) to find out how you can enable support for *Verified by Visa* and *MasterCard SecureCode* programs in your store.

## 3.2.1 User Access Control

X-Cart allows you to use a mode of enhanced protection for your store's back-end in which you can control, from which IP addresses users can access the store's back-end.

**Note:** In X-Cart GOLD, the back-end is the store's Admin area; in X-Cart PRO - the Admin area and the Provider area.

By default, the mode of enhanced protection for your store's back-end is disabled. You can enable it by setting the value of the constant `SECURITY_BLOCK_UNKNOWN_ADMIN_IP` in X-Cart's main configuration file [config.php](#) to "true".

**Warning:** If you are not sure how to edit this file, please request assistance from someone with knowledge of PHP or contact X-Cart's technical support.

After you enable this mode, you should log in to the Admin zone so that your own IP address is registered with the system. After that, no user will be able to log in to the store's back-end until you register his or her IP address: all log-in attempts will be denied and the users will get the following message:



Provided that the login/password entered by the user attempting to log in correspond to the login/password of an existing user belonging to a user type with permissions to access the respective X-Cart zone, a request to register the user's IP address will be sent to the email address specified under 'Site administrator e-mail address' in 'General settings/Company options'. This request will provide you with information about the time of the log-in attempt, the login name of the user who attempted to log in and the IP address that was used. You will be able to consider this information and, if necessary, grant access to the user by clicking on a specially crafted link contained in the email message. As a result, the IP address will be registered with the system (entered into your store's list of allowed IP addresses).

Naturally, it is possible to manage allowed IP addresses and requests for IP address registration through your store's Admin interface.

### Managing your store's list of allowed IP addresses

Your store's list of allowed IP addresses is stored in the database and can be managed through the 'User access control' section of the store's administration back-end.

To view your store's list of IP addresses:

1. Go to the 'Summary' section (Administration menu->Summary).

2. In the section menu, click on the link 'User access control'. The 'User access control' section opens. You should be able to see the list of IP addresses for which access to the back-end of your store is permitted in the 'Allowed IP addresses' dialog box.

Before you add any IP addresses of other users to the list, it will contain an only IP address - your own:



You can add IP addresses to the list using the 'Add IP address' field:

1. Enter the desired IP address into the 'Add IP address' field.
2. Click the **Add** button. The IP address will be added to the list. You should see an Information box with a confirmation message.

Instead of adding individual IP addresses one by one, it is possible to define patterns that would match multiple IP addresses. Patterns can use numbers (0-255) and the asterisk character. An asterisk matches any number in the range 0-255 and can be used to replace an IP octet. For example, to allow access from any host on the 195.24.53 network, set the pattern as 195.24.53.\*.

**Note:** When creating a pattern, be aware that you can use asterisks in non-final IP address octets only if you are going to replace all the octets that follow it by asterisks, too. Patterns formatted differently will be deemed incorrect. For example, patterns like 195.\*.\* or 195.24.\*.\* are correct; patterns like 195.\*.53.\* are incorrect.

If the list of allowed IP addresses contains an IP address that needs no longer be allowed for access to the store's back-end, you can remove this IP address from the list of allowed IP addresses. To remove an IP address from the list of allowed IP addresses:

1. Select the check box next to the IP address that needs to be removed (Select multiple check boxes to remove more than one IP address).
2. Click the **Delete selected** button. The selected IP address(es) will be removed from the list. You should see an Information box with a confirmation message.

Please note that it is not possible to remove your own IP address from the list. (The check box displayed next to your own IP address is grayed out).

## Managing IP address registration requests

In addition to being sent to the site administrator's email address, IP address registration requests appear in the dialog box 'IP address registration requests' of the 'User access control' section.

**Note:** The dialog box 'IP address registration requests' is displayed only if there are active requests.

The list of requests is a list of IP addresses awaiting registration.



If you go to the 'User access control' section and see one or more IP address registration requests in the 'IP address registration requests' list, you need to decide whether you wish to delete them or to register the respective IP addresses with your store system.

To delete an IP address registration request:

1. Select the check box next to the IP address whose registration is requested (Select multiple check boxes to delete more than one registration request).
2. Click the **Delete selected** button. The selected request(s) will be deleted (The selected IP address(es) will be removed from the list). You should see an Information box with a confirmation message.

To register an IP address:

1. Select the check box next to the IP address that needs to be registered (Select multiple check boxes to register more than one IP address).
2. Click the **Register selected** button. The selected IP address(es) will be moved to the list of allowed IP addresses. You should see an Information box with a confirmation message.

## 3.2.2 Blowfish

Security of sensitive data in your store database is ensured by *Blowfish encryption algorithm*.

In X-Cart, Blowfish encryption algorithm provides two levels of data encryption:

1. Encryption based on using a Blowfish key (for order details, user passwords and some service data);
2. Encryption based on using a Merchant key (for order details).

Blowfish key-based encryption is used by default, while encryption based on using a Merchant key can be



enabled at your wish to ensure a still higher level of security for your customers' data.

## Blowfish key-based encryption

At the time of installation, in addition to Auth code, X-Cart generates another secret key to help you ensure store security - *Blowfish encryption key*. This key gets written to X-Cart's config.php file as a value of the \$blowfish\_key variable, and, immediately after installation, X-Cart begins using this key to encrypt user passwords, details field of xcart\_orders table, etc. The same key is used to decipher the encrypted data, so your customers' data stays protected even if your database gets stolen - provided, the malicious person does not have access to your config.php file and has not stolen your Blowfish key in some other way.

### Changing your Blowfish encryption key

It is quite safe to use X-Cart with the Blowfish key generated during installation; however, if you still wish to change it, use the utility for re-generation of the Blowfish encryption key provided with X-Cart tools (For details, refer to the chapter '[Tools](#)' in the 'Maintaining Your Store' section of this manual).

NEVER try to change your Blowfish encryption key by editing the value of the \$blowfish\_key variable in config.php: your data is already encrypted with this key and X-Cart needs exactly the same key to be able to decrypt it. Changing \$blowfish\_key manually will corrupt all the user passwords (including the administrator's password), so you will not be able to use the store.

Please be aware that a lost Blowfish key cannot be restored, so X-Cart team will not be able to help you regain access to your store if you remove or change the value of \$blowfish\_key.

## Merchant key-based encryption

Blowfish data encryption based on using a Merchant key is still more secure than the encryption method described above. In this method, you create a *Merchant key* - a password that allows you to encrypt the details of your customers' orders and to decrypt previously encrypted order details when you wish to view them. The higher level of security provided by this method is ensured by the fact that the key used to encrypt and decrypt order details is not stored anywhere in the system. The only thing that is stored is an MD5 signature of the key. When you need to access the details of a certain order, you manually enter your Merchant key into a special form on the 'Order details' page. The system calculates the MD5 hash of the Merchant key entered and compares it to the MD5 signature of the original Merchant key stored in xcart\_config database. If the signatures are deemed to be identical, you will be allowed to access the details of any orders during the current admin session. In the next session, you will be supposed to re-enter the Merchant key to get access to order details.

### Enabling Merchant key-based encryption

If you wish to enable Merchant key-based Blowfish encryption in your store, enable the option 'Blowfish encryption method is enabled' in the 'General Settings/Security options' section of the Admin interface and create a password that will be used as your Merchant key:

1. Go to the 'General Settings/Security options' section of the Admin zone.
2. Select the 'Blowfish encryption method is enabled' check box.
3. Click the **Save** button. You should be redirected to a page titled 'Add merchant key'. This page provides a form for creating a Merchant key:



The screenshot shows a web form titled "Add merchant key" with an orange header. Below the header, the text reads "This is the section for changing Merchant key". There are two input fields: "Merchant key: \*" and "Confirm merchant key: \*". Below the fields is a "Submit Query" button.

4. Think of a password that you would like to use for access to order details in your store. Please make sure the password is not too short or too simple. The minimum length of a Merchant key is 6 characters. You probably needn't worry about the maximum length, as the maximum size of a Merchant key is 64 kB.
5. Enter the desired password into the 'Merchant key' field of the 'Add merchant key' form.
6. Type the password once again into the 'Confirm merchant key' field.
7. Click the **Submit Query** button.

A validation routine will check if the key you provided meets the length requirements and if the password in the confirmation field matches the original one. If everything is OK, the option 'Blowfish encryption method is enabled' will be enabled. Any data which has been encrypted by this time using the hard-coded Blowfish key from config.php will be decrypted and re-encrypted using the Merchant key. On completion, you should see an Information box with a confirmation message.

### Using your Merchant key to access order details and to apply encryption to new orders

After the creation of a Merchant key, a form titled 'Enter merchant key' will appear on the 'Order details' page.

### Enter merchant key

Entering your current Merchant key into this field allows you 1) to access order details encrypted with Merchant key-based Blowfish encryption; 2) to apply Merchant key-based encryption to new orders which, so far, have been encrypted with the hard-coded Blowfish key (the one stored in the `$blowfish_key` variable of the `config.php` file).

Note: As your Merchant key is not stored in the system, new orders which are placed by your customers are not encrypted with this key right away. They are first encrypted with the hard-coded Blowfish key stored in the `config.php` file and are re-encrypted using the Merchant key only when you enter your Merchant key into the system.

Merchant key

You will see this form in any new user session when you attempt to view your customers' orders. To access the details of any order in the database, you will need to enter your Merchant key into the appropriate field in this form and click the **Enter** button. The form will disappear as soon as you enter a correct Merchant key and generally will not be shown again until the session expires.

Please be aware that, because your Merchant key is not stored in the system, new orders getting placed by your customers will not be encrypted with the Merchant key right away. After placement, they will be encrypted with the hard-coded Blowfish key from the `$blowfish_key` variable of `config.php`. Only after you enter your Merchant key into the system will the bulk of new orders accumulated by this time be decrypted and re-encrypted using the Merchant key.

Here we need to make one important reservation: using the 'Enter merchant key' form in the Admin zone is not the only way of providing your Merchant key to the system. X-Cart provides an interface which allows you to initiate re-encrypting of the details field of `xcart_orders` table remotely: `admin/post_recrypt.php`. This interface can be accessed through the address line of your browser:

```
http://www.example.com/xcart/admin/post_recrypt.php?merchant_password=12345
```

(where `http://www.example.com/xcart/` is the address of your store and `12345` is your Merchant key),

or using the command line:

```
/usr/bin/php {xcart_root_dir}/admin/post_recrypt.php merchant_password=12345
```

(where `{xcart_root_dir}` is your X-Cart root directory and `12345` is your Merchant key).

### Changing your Merchant key

It is possible to change a once created Merchant key, but before you are allowed to create a new Merchant key, you will be supposed to disable the already existing one.

### Disabling Merchant key-based encryption

Merchant key-based Blowfish encryption cannot be disabled without first entering a valid current Merchant key. This guarantees that encryption of order details will not be disabled by a person who is not authorized to do so even if this person gains access to the Admin interface.

If you wish to disable Merchant key-based Blowfish encryption, do the following:

1. Go to the 'General Settings/Security options' section of the Admin zone.

If you have already entered your Merchant key in the current session, the option 'Blowfish encryption method is enabled' will look as follows:

Check if payment gateway response is coming from the IP's specified here (enter a comma separated list)::

Blowfish encryption method is enabled:

Check MD5 of compiled templates for better store protection at a

This means you can simply proceed to step 2.

If you have *not* yet entered your Merchant key in the current session, the option 'Blowfish encryption method is enabled' will look as follows:

Check if payment gateway response is coming from the IP's specified here (enter a comma separated list)::

Blowfish encryption method is enabled: Enabled

**The option cannot be disabled without first entering a valid Merchant key on the Order details page.**

Check MD5 of compiled templates for better store protection at a

This means the option cannot be disabled until you get authorized. Go to the 'Orders Management' section (Administration menu->Orders), do a search for any order and open its details. This should make the form 'Enter merchant key' appear on the page. Enter your Merchant key into the appropriate field in this form and click the **Enter** button. Wait for the key to be applied and return to the 'General Settings/Security options' section. This time you should see a selected check box opposite the option 'Blowfish encryption method is enabled'. Proceed to step 2.

2. Unselect the 'Blowfish encryption method is enabled' check box.
3. Click the **Save** button. Merchant key-based Blowfish encryption will be disabled.

### 3.2.3 PGP/GnuPG

#### How you can use PGP encryption with X-Cart

To ensure security of mail traveling over the Internet from the store to the orders department, X-Cart allows you to use PGP encryption for orders department email notifications. A program providing PGP-type encryption (GnuPG or its commercial analog PGP) has to be obtained and installed separately.

**Note:** PGP 6.0 or above is required.

Detailed information on PGP and GnuPG is available here:

PGP:

<http://www.pgpi.org/doc/>

[http://en.wikipedia.org/wiki/Pretty\\_Good\\_Privacy](http://en.wikipedia.org/wiki/Pretty_Good_Privacy)

GnuPG:

<http://www.gnupg.org/>

[http://en.wikipedia.org/wiki/GNU\\_Privacy\\_Guard](http://en.wikipedia.org/wiki/GNU_Privacy_Guard)

#### Setting up X-Cart to use PGP or GnuPG

To adjust X-Cart to use PGP encryption for email messages sent to the Orders department, do the following:

1. Adjust the option 'Order emails encryption method' in the 'General security options' section of General settings->Security options (Select *PGP* or *GnuPG*).
2. Configure the selected method using the appropriate section of General settings->Security options ('PGP options' or 'GnuPG options').
3. Use the section 'Test data encryption' of General settings->Security options to test whether PGP/GnuPG encryption is working correctly:
  - a) Use the link '[Click here to test data encryption by GnuPG/PGP](#)' to access the 'Testing data encryption by PGP/GnuPG methods' page.
  - b) Use the 'Text to encrypt' field of the 'Test PGP/GnuPG' dialog box to provide a message that the application will try to encrypt. The message can be any piece of text.
  - c) If you wish the encrypted message to be sent by email, enter a valid email address into the 'Send encrypted data to email' field.
  - d) Select the 'Show GnuPG/PGP errors and warnings' check box.
  - e) Click the **Submit** button.

X-Cart will try to encrypt the submitted message using the PGP software installed on the server. If PGP encryption turns out successful, the 'Encrypted data' box, that will appear below the 'Test PGP/GnuPG' box, will contain something like this:

```
-----BEGIN PGP MESSAGE-----
```

```
Version: GnuPG v1.4.0 (FreeBSD)
```

```
hQIOAyCcQA65n/mrEaf+IY3PPIu6xymwppEDt9dz26NCjnB2uOZU8uEtPXDyW8wT
I9SNXtKcntFJVf6Y01FbHfDe1ddUYeY/vqTII9Um+DrSak5k1oNzwwYxR6AViqV8
XIYVzylMtVuy3c0f8dZfXTxw0qDftBTvA66ERJZeOY19VFIYK/RRSCAqGCgitHPY
atRukC93953FPM12U1bEHITV7F6IDPKCcVyBnbQIgWgI2rS2PLBNpCkVy4uN4ZuH
w+obtB1KQpwXuxwgiLak6wPLrn6FPWoNL2Yw8ZxMz862Nc4HinZtACk+AT0dhIU
IFsL38LIfaU5iC7dkSGe5D80tgrV1VEx9D6LOiw64QgA2NgUUgEQeub4xR2x7Za
2hz5AUyOu15fqyV01veg7EUFohGa4hHxjxegUrSkCPRk4mpIEZJ9gh7j+h+o8otA
+9Z3YzEsrQbdJKeuK/SH8he6qjohO9KzpEhqomVcrgwR6+AhpjXNpdcl8xKVOevn
Phwed7oFSyJCRih2Q3EwJMd7rB+vaAWtLgeG9jgjS5njld3QdfcvL8dDGXW6Hjrv
Og3LjH7N2I/2p70AFhMJYNBedqvymRBb5SKu7DRjwzt4pAuh3ebEZYdqqWxWoW8A
FSKN4qsT0sHkoEbWgF9JpBB9SukqJ/okuyrtOzaNmcTstM7T4L81j01WjANbaDEr
JtJLASoyjVvmyxyEtr6dWaBIA5rdL4MypQWEDhUkRuaCwh567GMyyq4/ml1gS3UZq
1I6Oibfa1JjHz5eyDnrCoTpw42LS7u24duTnqXuu
=Cbm1
```

```
-----END PGP MESSAGE-----
```

If the attempt to encrypt the message is unsuccessful, in the 'Encrypted data' box you will see exactly the same text you entered into the 'Text to encrypt' field.

## Using PGP/GnuPG keys

### GnuPG

First, you need to create your keys. Here is what the process of generating keys might look like (In our example we are using a fake name and email address - John Smith <john.smith@example.com>):

```
$ gpg --gen-key
gpg (GnuPG) 1.4.0; Copyright (C) 2004 Free Software Foundation, Inc.
This program comes with ABSOLUTELY NO WARRANTY.
This is free software, and you are welcome to redistribute it
under certain conditions. See the file COPYING for details.

gpg: WARNING: using insecure memory!
gpg: please see http://www.gnupg.org/faq.html for more information
Please select what kind of key you want:
  (1) DSA and Elgamal (default)
```



```

some other action (type on the keyboard, move the mouse, utilize the
disks) during the prime generation; this gives the random number
generator a better chance to gain enough entropy.
...+++++.+++++.+++++.++++.++++.++++.+++++
gpg: /home/john/.gpg/trustdb.gpg: trustdb created
gpg: key FEE11881 marked as ultimately trusted
public and secret key created and signed.

gpg: checking the trustdb
gpg: 3 marginal(s) needed, 1 complete(s) needed, PGP trust model
gpg: depth: 0 valid: 1 signed: 0 trust: 0-, 0q, 0n, 0m, 0f, 1u
gpg: next trustdb check due at 2005-06-10
pub  1024D/FEE11881 2005-05-11 [expires: 2005-06-10]
     Key fingerprint = A966 6E03 36E8 B539 1BD6 3E42 853D 077C FEE1 1881
uid          John Smith <john.smith@example.com>
sub  2048g/B99FF9AB 2005-05-11 [expires: 2005-06-10]

```

Then you need to obtain a list of keys:

```

$ gpg --list-keys
gpg: WARNING: using insecure memory!
gpg: please see http://www.gnupg.org/faq.html for more information
-----
pub  1024D/FEE11881 2005-05-11 [expires: 2005-06-10]
uid          John Smith <john.smith@example.com>
sub  2048g/B99FF9AB 2005-05-11 [expires: 2005-06-10]

```

Then you need to export the keys so that later you will be able to complete the 'GnuPG public key' field in the 'GnuPG options' section of the General settings->Security options page:

```

$ gpg -a --export john.smith@example.com
gpg: WARNING: using insecure memory!
gpg: please see http://www.gnupg.org/faq.html for more information
-----BEGIN PGP PUBLIC KEY BLOCK-----
Version: GnuPG v1.4.0 (FreeBSD)

mQGiBEKB4RMRBADEA1mSy+zABeow+jF5hHdhfQpEP3YTkvkWO78a/EGpIoEnL8Ck
WUcADwR1ilRr0BDNuamfpFwNPU58dlvFPLPXn14FHJ0rfa8eIty50eV6puA61oANn
XNaoJ2cAaxC6cYC+N7PDKTbnRbMZArc3p9T6gKJeGyc1Ty1dhUS7JJ/G/wCg27fn
FYWLmAF9yT8EhMk7p5oa6k8D/j8T8YahBrXSZouahp8VsmCr8/TTYfoVTTcCFW6a
lECgv4M1Es1h9pTAmIzxmu4yGLzU9EOovi3511OLOxoq6GhpR9n+VKzB2qUxWdqv
LJpXYty+DjtI7o90Ih9w0bDkkVgmblyJIRF0gMk3nluYYiqrD8udkYOYfGJeSnf+

```



```
MB0rBACc7Q4LrCdElee3/ZI7uDugYcgNyPRwtb/IGzY0VNF+1tkYxwHOIy7yJUuM
a8CngJQlMC9xjX3jSyOeFjIj8ldmLWh5TIqEZGOQP7RYfO8XtJyZRIWgl2sRSq0a
yTZW+oRLl6QLjMDQTvy4YrMA5eGFmGx9C8sxFhQPASNq1Bu+hLQjSm9obiBTbWl0
aCA8am9obi5zbWl0aEBleGFtcGxllmNvbT6IZAQT EQIAJAUCQoHhEwIbAwUJACeN
AAYLcQgHAWIDFQIDAXYCAQIEAQIXgAAKCRFCFPQd8/uEYgTXHAJ0Y33tia6tnUHpm
o/qhRalpXm+5/wCfRpxiQlSI8FQYotJP4ZNTlh5ESha5Ag0EQoHhGRAIAON902gU
dsoDyNV+nVZQdwntqNiDfifOpNP+gGHQsYzH5cu0YC3mxFGjZK2s3/0GPq9+5AYW
lkkYlvompmmKTF8rYTXT7vnSizFiUSf4V+63XzSxnY3NexIyj94Lvpz66SOJXq3
K3P/jaxllb8tQxKU/gl0HuynKlRI1YuEXIDx4xfXqtnFHbF+a+GqERz9MlCpq3Zt
lHq/4becsx9zfVWxsduzRn/3J+bRLmXYOCQNMOM9kNmzH8RMz96q4J5Q8+b+GDO
V0swG3xycy3OZpTwtqPQ84LmqcCmMVUfi7tN1EH++J+ClnCx2u6eOb/2kPUON03BP
WHfwANCn+LniEb8AAwUIAM64Cx2ryhHtjJtizFAsU3V4tH256cHdPaijSRoNcy9L
YJinDgDl90CEvcF9ME7E3Ly6+aWBBcCw3ghXQQUFO/Xc7DN1hvcWN5dDWf4lPt2Z
Xo/dYjwHjD+PaOQoxeZ6SDmXWxGwoF83ygLDVvX9b8gaHW0GI588v+62h0RVKrIa
caivXdDTqh80lh8N9CVGoIFS3uA8nRxDG1jjWawcHdN14wyRqdXlz+a4/RK+ZlUx
oJ2dIQokiQEEhohMzmvd/lXXjCzKnQjpeS5HUTgL/3HmgCyAM7tAzcuJccAI3iHw
nM1m9m+mEQWLIX6zillOo/IsV2GOJ/EJlhDjRD2yyX6ITwQYEQIADwUCQoHhGQIb
DAUJACeNAAAKCRFCFPQd8/uEYgVazAJ9DreCt0WFKyGwRhyifIeSGTHFUKwCgzShE
V17tla6xCz7L+RArsXjrsVk=
=ow2K
-----END PGP PUBLIC KEY BLOCK-----
```

## PGP

The process of creating and using keys for PGP is similar to that for GnuPG. You need to create a key and then export it with armor (--armor or -a for GnuPG, or its analog for PGP).

### 3.2.4 3-D Secure Payment Authentication

3-D Secure™ is an XML-based protocol used as an added layer of security for online credit and debit card transactions.

X-Cart supports 3-D Secure™ transactions with the multiple credit card processors such as:

- AuthorizeNet: AIM,
- USAePay,
- Netbilling,
- eSelect plus,

**Note:** only Direct Post solution is supported now, Hosted Paypage is unavailable. eSelect plus also requires a PCI compliance certificate for Direct Post.

- Protx VSP Direct,
- PSiGate XML interface.

Some of the credit card processors support 3-D Secure™ transactions through Cardinal Centinel® payment authentication platform, while others have integrated 3-D Secure™ and do not require any additional steps. All the settings that need to be adjusted are located on the corresponding payment method configuration pages.

### Cardinal Commerce

X-Cart features integration with Cardinal Centinel® payment authentication platform (CardinalCommerce Corp.). This platform was 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 chargebacks which are so damaging to both customers and your online business. Detailed information is available at <http://www.cardinalcommerce.com>.

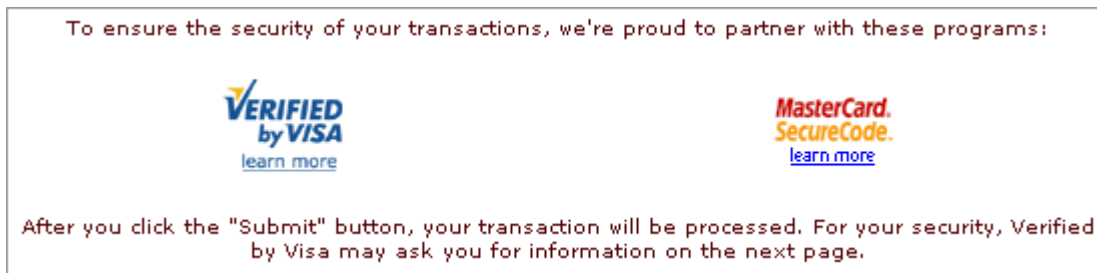
Configuration pages of the credit card processors that support 3-D Secure payment authentication utilizing Cardinal Centinel® contain the following message:

Supports 3-D Secure Payer Authentication.  
Go to **3-D Secure Transaction options** to enable it.

To enable 3-D Secure payment authentication, do the following:

1. Complete Cardinal Centinel registration (Start by completing Cardinal Centinel Merchant Registration Form at [https://billing.cardinalcommerce.com/centinel/registration/xcart\\_landing.asp](https://billing.cardinalcommerce.com/centinel/registration/xcart_landing.asp)).
2. In General settings->3-D Secure Transaction options, enable Cardinal Centinel® payment authentication and complete the other fields with information obtained as a result of getting registered with Cardinal Centinel.
3. Make sure your preferred HTTPS module defined in General Settings->General Options is available on your system and functions correctly (You can check the status of your HTTPS modules using Administration menu-> Summary).

To let your customers know you are working to secure Internet shopping, the following message will be displayed on checkout to customers who choose to pay for an order using a payment method that supports 3-D Secure payment authentication:



With 3-D Secure payment authentication enabled at your store, customers will progress through checkout as usual - with the only difference that, after they provide their payment details and click the **Submit** button, an additional form will be displayed into which they will be supposed to enter their Verified by Visa password or MasterCard secure code.

### 3.2.5 Security Checklist

Here are a few things to check before your store goes live:

1. After installation, remove your install.php file, and any other install files from add-on modules.
2. Lock your "log" and "sql" directories. Best way is to use ".htaccess" files denying permission entirely. To check the effectiveness, browse to a link like:

<http://www.mysite.com/cart/sql>

If you don't get access, that's good. If you can see files, you've got a potential hole.

3. Don't keep backups in the "log" directory. Make a backup when you need one, copy it away, and remove the original. I have a script that makes a backup each night into a secure directory.

4. Always log into your admin area with https:

<https://www.mysite.com/cart/admin>

5. Force all cart pages to be used by customers in secure (https) mode. - Check these boxes in General Settings:

Do not redirect customers from HTTPS to HTTP:

Use HTTPS for users' login and registration:

**Warning:** You need to make sure you have your https configured correctly at the server level before you do this or you will lock yourself out of the store! For non-windows servers, you need to set up a symlink, which links the http and https directories.

6. Put an "index.php" file in each subdirectory of the cart to prevent directory browsing. The only text you need in these files is a re-redirect to your homepage. Alternatively, some hosts will disable directory listing

for you.

7. Never keep the 'Master' account. When you first log in to X-Cart, create a new admin account, log out, log back in with the new account and delete the master account.

8. Password protect your Admin and Provider directories. One extra level of protection will discourage hackers. This can usually be done via your hosts Control Panel.

9. Turn OFF the option of sending CC info via e-mail - in General Settings/E-mail options.

10. Change your permissions:

.php - 644

.tpl - 644

.pl - 755

.sh - 755

VERSION - 644

FOLDERS

templates\_c - always 777

catalog - 777 - (to be able to write catalog and then 755 once catalog has been written)

files - 777 - (to be able to write to the folder / upload pics etc)

log - 777

All others - 755

You can do this via FTP, your hosting control panel, or by using SSH with a command like this:

```
find ./ -name "*.php" -print -exec chmod 644 {} \;
```

11. Disable storing of CC info in the database (unless you are using manual credit card processing). Open up config.php (found in your root directory) and change this line:

```
$store_cc = true;
```

to

```
$store_cc = false;
```

## 3.3 Geographical Settings

### Geographical settings in X-Cart

Adjustment of your store's geographical settings includes defining *countries*, *states*, *counties* and *destination zones*.

Countries, states and counties are countries, states and counties from which you allow customer registrations and to which your store's products can be sold and shipped. Names of your store's active countries, states and counties appear in drop-down boxes on all the pages where addresses can be entered ('Profile details' form, General settings->General options section, General settings->

>Company options section) so that store users can use them as address components when entering addresses. They are also used to define destination zones.

Destination zones are unities consisting of territories to which your products can be sold and shipped, and for which shipping and tax rates are the same. Defining the store's destination zones correctly is very important, because destination zones serve as a basis for adjusting shipping charges and tax rates for different locations.

## Roles in geographical settings management

If you are an X-Cart GOLD administrator/provider:

- You can manage countries (Study the section [Countries](#)):
  - define what countries need to appear in 'Country' drop-down boxes in form sections intended for entering addresses;
  - define what countries have states (required for JavaScript state and county selector);
  - edit names of countries;
  - define country names in all the languages used by your store.
- You can manage states (See the section [States](#)):
  - define names and codes for the states that need to appear in 'State' drop-down boxes in form sections intended for entering addresses;
  - edit state names and codes;
  - delete states.
- You can create and manage counties (See the section [Counties](#)):
  - enable usage of counties in your store;
  - define which states have counties;
  - define names for the counties that need to appear in 'County' drop-down boxes in form sections intended for entering addresses;
  - edit names of counties;
  - delete counties.
- You can define and manage destination zones (Check out the section [Destination Zones](#)).

If you are an X-Cart PRO administrator:

- You can manage countries (Study the section [Countries](#)):
  - define what countries need to appear in 'Country' drop-down menus on all the forms used to specify billing/shipping addresses;
  - define what countries have states (required for JavaScript state and county selector);
  - edit names of countries;

- define country names in all the languages used by your store.
- You can manage states (See the section [States](#)):
  - define names and codes for the states that need to appear in 'State' drop-down menus on all billing/shipping address forms;
  - edit state names and codes;
  - delete states.
- You can create and manage counties (See the section [Counties](#)):
  - enable usage of counties in your store;
  - define which states have counties;
  - define names for the counties that need to appear in 'County' drop-down menus on all billing/shipping address forms;
  - edit names of counties;
  - delete counties.

If you are an X-Cart PRO provider:

- You can define destination zones and manage your own destination zones (Check out the section [Destination Zones](#)). You cannot manage destination zones created by other providers.

### 3.3.1 Countries

Countries in your store can be managed using the 'Countries Management' section of the administration back-end (Management menu->Countries). This section contains a dialog box titled 'Countries' which provides a table of country names and allows you to adjust attributes of individual countries: country codes, absence/presence of states and active/inactive status.

**Countries**

[All regions](#)  
 [North America](#)  
 [Europe](#)  
 [Australia and Oceania](#)  
 [Latin America](#)  
[Former USSR](#)  
 [Asia](#)  
 [Africa](#)  
 [Antarctica](#)

[Check all / Uncheck all](#)

CODE	COUNTRY	HAS STATES	ACTIVE
CA	Canada	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
GL	Greenland	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PM	St. Pierre and Miquelon	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>US</b>	<b>United States</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

The links provided at the top of the 'Countries' dialog box ([All regions](#), [North America](#), [Europe](#), etc) allow you to view and manage sets of countries located in the named regions.

Table columns provide the following information:

- **CODE** - ISO 3166-1 alpha-2 country codes (unique two-letter codes assigned to countries). These codes are used for X-Cart's inner processes and also appear in 'State' drop-down boxes when the JavaScript version of X-Cart's state and county selector is disabled.
- **COUNTRY** - Country names.
- **HAS STATES** - Check boxes whose status indicates absence/presence of states in a country. You do not need to worry about adjusting 'has states' boxes if you are not going to use the JavaScript version of X-Cart's state and county selector. However, if you wish to use the JavaScript selector and enable the respective option in General settings->General options, you need to have reliable information as to the territorial division of countries to which you are going to sell products. At least, you need to keep enabled the check boxes of countries for which you are going to define states. You also do not want to disable 'has states' check boxes for countries of whose 'has states' status you are not sure (If it turns out such a country really has states, customers from this country will be able to enter state names using an input box).
- **ACTIVE** - Check boxes whose status defines whether a country is included into 'Country' drop-down menus or not (Only countries whose 'active' check box is selected are included). By default, all the countries in the table are active. If you need to limit the number of countries from which profile registrations will be welcome, deactivate all the countries that you do not want to be included.

**Note:** The country displayed in the table against a darker grey background is the country of location of your default customer.

## Adding/deleting countries

The set of countries that can be used in an X-Cart-based store is rigidly defined in the system, so you cannot add new countries to the list or delete existing ones. What you can do is edit country names, activate/deactivate specific countries and change their 'has states' statuses.

If you do not wish some of the countries to appear in 'Country' drop-down boxes on user registration/user profile forms, simply deactivate the countries that you wish to be excluded.

If a country you need is not on the list of available countries, request assistance from X-Cart technical support team.

## Editing countries

To edit a country name, find the name in the table, replace it with a new one and click the **Update** button.

To change a country's 'has states' status, adjust the check box opposite its name in the HAS STATES column and click the **Update** button.

To activate/deactivate a country, select/unselect the check box opposite its name in the ACTIVE column and click the **Update** button. You can use the Check\_all / Uncheck\_all links located above the 'Countries' table to select or unselect all the 'active' check boxes on the current page. You can also activate/deactivate all the countries in the table regardless of the country set selected with a single click: by using the buttons **Activate All** and **Deactivate All**.

## Multilingual support for countries

It is possible to have different names for your active countries that will be used depending on the language selected for the interface. Names for countries can be created using the 'Edit languages' section of your store (Administration menu->Languages).

To add country names in a language that does not yet have its own names for countries:

1. Go to the 'Edit languages' section.
2. Select the necessary language for editing. Make sure the charset specified in the 'Edit language' form is correct. If not, enter the necessary charset code and click on **Change**.
3. Use the language selector to switch the current language of the Administrative zone to the target language.
4. Enable your computer to type in the selected language.

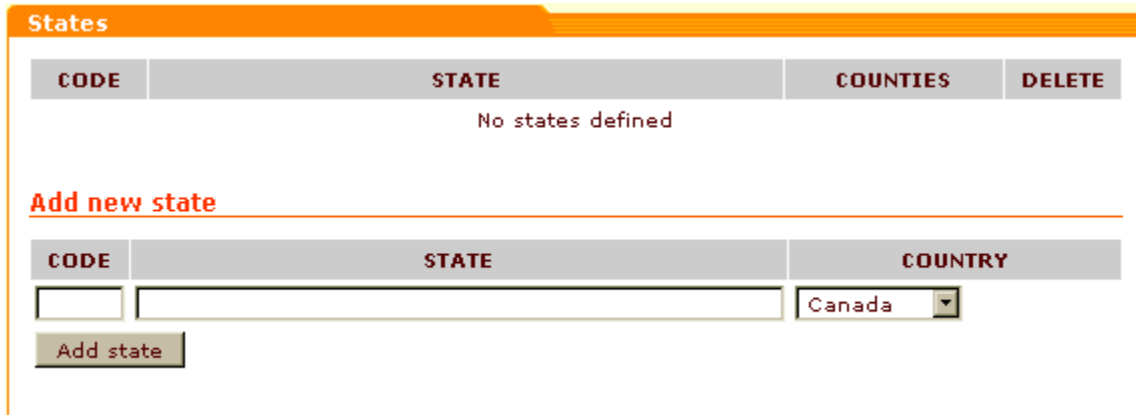


5. Select the topic 'Countries' in the language variables filter.
6. Use the 'Edit language entries' dialog box to translate the necessary country language variables into the selected language and apply the changes by clicking the **Update all** button.

### 3.3.2 States

Lists of states for your store's 'active' countries can be adjusted using the 'States Management' section of the administration back-end (Management menu->States).

This section contains a dialog box titled 'States'. Depending on whether you imported any states into your store during installation, the dialog box will either be empty:



The screenshot shows a web interface titled "States" with an orange header. Below the header is a table with four columns: "CODE", "STATE", "COUNTIES", and "DELETE". The table is currently empty, with the text "No states defined" centered below it. Below the table is a section titled "Add new state" in red text. This section contains a form with three input fields: "CODE", "STATE", and "COUNTRY". The "COUNTRY" field is a dropdown menu currently set to "Canada". Below the form is a button labeled "Add state".

or will contain states of your active countries:

**States**

**Canada**
[United States](#)

[Check all](#) / [Uncheck all](#)

CODE	STATE	COUNTIES	DELETE
<b>Canada</b>			
<input type="text" value="AB"/>	<input type="text" value="Alberta"/>	n/a	<input type="checkbox"/>
<input type="text" value="BC"/>	<input type="text" value="British Columbia"/>	n/a	<input type="checkbox"/>
<input type="text" value="MB"/>	<input type="text" value="Manitoba"/>	n/a	<input type="checkbox"/>
<input type="text" value="NB"/>	<input type="text" value="New Brunswick"/>	n/a	<input type="checkbox"/>
<input type="text" value="SK"/>	<input type="text" value="Saskatchewan"/>	n/a	<input type="checkbox"/>
<input type="text" value="YT"/>	<input type="text" value="Yukon"/>	n/a	<input type="checkbox"/>

**Add new state**

CODE	STATE	COUNTRY
<input type="text"/>	<input type="text"/>	Canada <input type="button" value="v"/>

In the latter case, you will only see the states of just one country - the one whose name link at the top of the dialog box is selected. To view the states of some other active country, click on the name link of this country.

The 'States' table provides the following information:

**CODE** - State codes (must be unique on a per-country basis). These codes are used for X-Cart's inner processes and also appear in customer addresses on the invoice.

**STATE** - State names.

**COUNTIES** - Number of counties in a state (n/a is displayed when no counties are defined).

**Note:** COUNTIES column appears in the table only when use of counties in the store is enabled. Check the option 'Use counties' in General settings->General options.

## Adding states

To add a new state to the list:

1. Go to the 'States Management' section (Management menu->States).
2. In the 'States' dialog box, scroll down to the 'Add new state' section.
3. Provide the necessary information about the state being added: state code, state name and the country to which the state needs to be added.
4. Click the **Add state** button. The state should be added. You should see an Information box with a confirmation message. To view the state you have added, click on the name link of the country to which you have added it - the state should be in the list.

### Editing states

To rename a state or to change a state's code:

1. Go to the 'States Management' section (Management menu->States).
2. In the 'States' dialog box, find the state name or code that needs to be edited.
3. Change the code and/or the name of the state.
4. Click the **Update** button to save the changes. The information should be updated. You should see an Information box with a confirmation message.

### Deleting states

To delete one or more states:

1. Go to the 'States Management' section (Management menu->States).
2. In the 'States' dialog box, find the states you wish to delete and select the DELETE check boxes opposite their names. You can use the Check all / Uncheck all links to select or unselect all the check boxes on the current page.
3. Click the **Delete selected** button. The states selected for deletion should be removed. You should see an Information box with a confirmation message.

### Multilingual support for states

Multilingual support for states is currently not implemented in X-Cart.


### 3.3.3 Counties

Counties are territorial divisions smaller than a state but larger than a city or town. Use of counties in a store is optional. Usage of counties can be enabled/disabled with the option 'Use counties' in General settings->General options.

Counties in your store can be set up using the 'Counties Management' section of the administration back-end. This section is only available when use of counties is enabled in General settings->General options. To access the 'Counties Management' section, do the following:

1. Go to the 'States Management' section (Management menu->States).
2. In the 'States' table, find the name of the state whose counties you wish to access.
3. Click the link in the COUNTIES column opposite this state.

The dialog box 'Counties', which you can find in the 'Counties Management' section, will help you define counties for the selected state. Before you have created any counties, the dialog box will be empty:



**Counties**

**Wisconsin (United States)** [Return to states list](#) >

COUNTY	DELETE
There are no counties for this state	

**Add new county**

Enter county name:

After you create some counties, it will look something like this:

### Counties

#### Wisconsin (United States)

[Return to states list](#) >

[Check all](#) / [Uncheck all](#)

[Check all](#) / [Uncheck all](#)

COUNTY	DELETE
<input type="text" value="Adams"/>	<input type="checkbox"/>
<input type="text" value="Ashland"/>	<input type="checkbox"/>
<input type="text" value="Bayfield"/>	<input type="checkbox"/>

#### Add new county

Enter county name:

## Adding counties

To add a county for a state:

1. Open the 'Counties Management' section (Click the link in the COUNTIES column opposite the name of the state for which you are going to add a county).
2. In the 'Add new county' section of the 'Counties' dialog box, enter the desired county name into the field titled 'Enter county name'.
3. Click the **Add** button. The county should be added to the list above. You should see an Information box with a confirmation message.

## Editing counties

You can edit names of existing counties.

To edit a county name:

1. Open the 'Counties Management' section (Click the link in the COUNTIES column opposite the name of the state whose county you wish to edit).
2. In the 'Counties' table, replace the existing name of the county with the desired name.

3. Click the **Update** button. The county name should be updated. You should see an Information box with a confirmation message.

## Deleting counties

To delete a county:

1. Open the 'Counties Management' section (Click the link in the COUNTIES column opposite the name of the state whose county you wish to delete).
2. In the 'Counties' table, select the check box in the DELETE column opposite the name of the county that you wish to delete.
3. Click the **Delete selected** button. The county should be deleted. You should see an Information box with a confirmation message.

## Multilingual support for counties

Multilingual support for counties is currently not implemented in X-Cart.

## 3.3.4 Destination Zones

### Defining destination zones

Before you set up any destination zones, your store has one destination zone defined by default - the so-called *Zone Default*. It includes all the store's active countries. As you will define your own destination zones, territories will be drawn from the default destination zone to the zones that you define.

To define a zone:

1. Go to the 'Destination zones' section of your store (Inventory menu->Destination zones). A dialog box titled 'Destination zones' opens.



This dialog box is intended for a list of your destination zones. Before you have defined any destination zones of your own, the only destination zone listed will be *Zone Default*.

2. Click the **Add new...** button. A dialog box titled 'Zone details' appears.
3. Use the 'Zone details' dialog box to define the zone:
  - a) Into the 'Zone name' field, enter a name for the destination zone.
  - b) Specify the locations that need to be included into the zone (See the section [Adding locations to a destination zone](#) further in this chapter for instructions).
4. Click the **Save zone details** button at the bottom of the 'Zone details' form to save the changes. The zone will be created.

To view your list of destination zones, you can click the link [Zones list](#) at the top right-hand corner of the 'Zone details' dialog box.

### Adding locations to a destination zone

Besides the 'Zone name' field, the 'Zone details' dialog box contains a few subsections that allow you to specify, what locations need to be included into the zone. According to the type of locations, the subsections are titled 'Countries', 'States', 'Counties', 'Cities', 'Zip/Postal codes' and 'Addresses'.

**Note:** The subsection 'Counties' appears in the 'Zone details' dialog box only when usage of counties is enabled in the store and at least one county is defined.

The subsections 'Countries', 'States' and 'Counties' contain two fields: 'Set' and 'Unset'. The 'Set' field is initially empty, while the 'Unset' field provides a list of your store's active countries/states/counties.

The subsections 'Cities', 'Zip/Postal codes' and 'Addresses' contain just one field - 'Set' - and a few examples demonstrating how this field can be completed.

To add locations to a destination zone means to enter names of locations pertaining to the territory of the destination zone into the respective 'Set' fields.

The principles behind destination zone setup are the following:

- Every destination zone needs to be defined consecutively on each of the following levels: countries, states, counties, cities, zip/postal codes and addresses. If, on any one level, no specific locations are selected as included into the zone, then *all* locations available within the level are included. For example, if, at the level of countries, you select '*United States*' and, at the level of states, you do not select any states, the zone territory equals the territory of the entire United States of America - all states and territories included.
- Each subsequent level of destination zone definition makes the definition provided by the previous level(s) more specific. This can be understood better if we consider the process of defining a destination zone as a step-by-step process of filtering off the territories that do not belong in the zone.

For example, if, at the level of countries, you select '*United States*' and, at the level of states, you select '*Alabama*', then, at the level of states, this definition filters off all U.S. states from the zone except for Alabama - and, thus, the zone territory is just the state of Alabama.

Under 'Countries', 'States' and 'Counties' subsections, locations can be added to the zone by moving the respective location names from the 'Unset' field to the 'Set' field:

1. Select the location(s) that you wish to add to the zone:
  - To select a single location, click on its name in the 'Unset' field.
  - To select multiple locations, hold down the CTRL key while clicking the names of locations with your mouse.
  - To select countries by regions, use the 'Quick select' feature (For example, to select all North-American countries, click on the link 'North America').
2. Click the [**<<**] button. The selected locations will be moved to the 'Set' field.

**Note:** The [**>>**] button can be used to move locations from the 'Set' field back to the 'Unset' field.

Under 'Cities', 'Zip/Postal codes' and 'Addresses' subsections, locations can be added to the zone by typing the respective city name, zip/postal code and address masks directly into the 'Set' field. City name, zip/postal code and address masks can use the following wildcards:

- Percent sign (%) - zero or more characters;
- Underline sign (\_) - any single character.

Here are some examples demonstrating how the 'Set' fields of the 'Zone details' dialog box need to be configured in order to define the following destination zones:

1. the whole of the U.S. territory:

Countries:	United States
States:	none selected
Counties:	none selected
Cities:	none specified
Zip/Postal codes:	none specified
Addresses:	none specified

2. the state of Alabama (United States of America):

Countries:	United States
States:	Alabama
Counties:	none selected
Cities:	none specified
Zip/Postal codes:	none specified
Addresses:	none specified

3. continental U.S. (all U.S. locations except Hawaii, Puerto Rico and Alaska):



Countries:	United States
States:	all U.S. states selected, except for Hawaii, Puerto Rico and Alaska
Counties:	none selected
Cities:	none specified
Zip/Postal codes:	none specified
Addresses:	none specified

4. all zip codes in the group 15000-19699:

Countries:	United States
States:	none selected
Counties:	none selected
Cities:	none specified
Zip/Postal codes:	15% 16% 17% 18% 190% 191% 192% 193% 194% 195% 196%
Addresses:	none specified

### How to define destination zones if you are going to use more than one shipping carrier

The problem associated with using multiple carriers for shipping is that different carriers may have overlapping zones for which they provide shipping rates. If the zones used by your shipping carriers overlap, you will need to make your destination zones smaller than the zones used by your carriers.

Here's an example:

You sell products to Minnesota, Iowa and Wisconsin, USA.

You use two carriers to ship orders to customers - Carrier A and Carrier B.

Carrier A provides shipping from your location to Minnesota and Wisconsin at the postage rate of \$4.60 per pound; it does not ship to Iowa.

Carrier B provides shipping to Minnesota and Iowa at the postage rate of \$3.90 per pound and does not ship to Wisconsin.

In this situation you may be tempted to define your destination zones as '*United States, Minnesota + Wisconsin*' and '*United States, Minnesota + Iowa*' meaning to define your shipping charges like this:

Shipping method: Carrier A Zone: United States, Minnesota + Wisconsin Charge: \$4.60 per lb
Shipping method: Carrier B Zone: United States, Minnesota + Iowa Charge: \$3.90 per lb

However, defining destination zones and shipping charges in the above way is *wrong*: the destination zones '*United States, Minnesota + Wisconsin*' and '*United States, Minnesota + Iowa*' overlap in the state of Minnesota, which means that shipping charges for addresses in Minnesota may be calculated incorrectly.

The correct solution for the above situation would be to define three zones - '*United States, Minnesota*', '*United States, Wisconsin*' and '*United States, Iowa*'. This way, you will have to define shipping charges as follows:

Shipping method: Carrier A Zone: United States, Minnesota Charge: \$4.60 per lb
Shipping method: Carrier A Zone: United States, Wisconsin Charge: \$4.60 per lb
Shipping method: Carrier B Zone: United States, Minnesota Charge: \$3.90 per lb
Shipping method: Carrier B Zone: United States, Iowa Charge: \$3.90 per lb

In the second case, defining shipping charges will involve more time and effort; however, this way you will be sure that shipping charges will always be calculated correctly.

## Editing destination zones

It is possible to edit previously defined destination zones.

To edit a zone:

1. In the 'Destination zones' dialog box, click on the name of the zone you would like to edit.
2. Use the 'Zone details' dialog box to change the details of the zone:

- You can rename the zone: Edit the name in the 'Zone name' field and click on **Update**.
- You can re-define the territories included into the zone:

To add a country/state/county to the zone, select its name in the respective 'Unset' field and click the [**<<**] button.

To remove a country/state/county from the zone being edited to *Zone Default*, select its name in

the respective 'Set' field and click the [>>] button.

To change the cities, zip/postal codes and addresses included into the zone, edit the respective 'Set' fields.

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

## Cloning destination zones

If you need to create a zone similar to one of your existing destination zones, you can clone this zone and then modify the zone details.

To clone an existing destination zone:

1. In the 'Destination zones' dialog box, click on the name of the zone you would like to make a copy of.
2. In the 'Zone details' dialog box 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.

## Deleting destination zones

If you no longer need a certain destination zone, you can delete it.

To delete a destination zone:

1. In the 'Destination zones' dialog box, 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.
2. Click the **Delete selected** button.

**Warning:** Deleting a destination zone results in deletion of all shipping charges and tax rates based on this zone. If you have some shipping charges and tax rates defined for a certain destination zone and do not want them deleted, do not delete the destination zone.

# 3.4 Shipping Settings

## Shipping settings in X-Cart

X-Cart allows you to define shipping methods that will be used by your store to deliver orders to customers and to inform your customers about the shipping methods available to them and about the cost of shipping by these methods. Before placing an order, your customers will be able to get an estimation of shipping cost by different methods and to choose a shipping method by which they wish the order to be shipped.

## Roles in shipping settings management

If you are an X-Cart GOLD administrator/provider:

- You can define shipping methods that will be used by your store (real-time and user-defined methods are supported). (See the chapter [Shipping Methods](#)).
- For real-time shipping methods, you can enable your store to use real-time shipping cost calculators (See the chapter [Real-time Shipping Calculators](#)).
- For user-defined shipping methods, you can adjust shipping rates depending on destination zones (See the chapter [Shipping Charges](#)).
- For real-time shipping methods, you can adjust markups (See the chapter [Shipping Markups](#)).

If you are an X-Cart PRO administrator:

- You can define shipping methods that will be used by your store (real-time and user-defined methods are supported). (See the chapter [Shipping Methods](#)).
- For real-time shipping methods, you can enable your store to use real-time shipping cost calculators (See the chapter [Real-time Shipping Calculators](#)).

If you are an X-Cart PRO provider:

- For user-defined shipping methods, you can adjust shipping rates depending on destination zones (See the chapter [Shipping Charges](#)).
- For real-time shipping methods, you can adjust markups (See the chapter [Shipping Markups](#)).

### 3.4.1 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).

### Shipping methods

#### Real-time calculated shipping methods

[Expand all](#) / [Collapse all](#)

<b>AirNet</b>	1 active method(s) out of 1
<b>Australia Post</b>	7 active method(s) out of 7
<b>DHL/Airborne</b>	7 active method(s) out of 7
<b>Canada Post</b>	24 active method(s) out of 24
<b>DHL</b>	0 active method(s) out of 2
<b>Emery</b>	3 active method(s) out of 3
<b>FedEx</b>	20 active method(s) out of 20
<b>UPS</b>	32 active method(s) out of 32
<b>U.S.P.S.</b>	31 active method(s) out of 31

#### Defined shipping methods

SHIPPING METHOD	DELIVERY TIME	DESTINATION	WEIGHT LIMIT (LBS)	POS.	ACTIVE	COD
<input type="text" value="test"/>	<input type="text" value="10-15 da"/>	<input type="text" value="International"/> <input type="button" value="v"/>	<input type="text" value="0.00"/> - <input type="text" value="15.00"/>	<input type="text" value="10"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="button" value="Delete"/>						

#### Add shipping method

<input type="text"/>	<input type="text"/>	<input type="text" value="International"/> <input type="button" value="v"/>	<input type="text" value="0.00"/> - <input type="text" value="0.00"/>	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="button" value="Update"/>						
				<input type="button" value="Enable All"/>	<input type="button" value="Disable All"/>	

There are 2 major groups of shipping methods that you can use:

1. Shipping methods with manually defined rates:

- user-defined methods (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 shipping methods can be adjusted within your store.

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 your own shipping methods

You can create your own shipping methods and define (or allow providers 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 delivery time in days (the average number of days in which ordered products can be shipped to the customer), the weight limit (the minimum and maximum weight that can be shipped using this method; set the value of these fields to zero 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 box, 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. Select COD check box to enable *Cash on delivery* for this shipping method. A customer then can select COD as a payment method.
5. 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 delivery time, the weight limit, the position number and COD availability can be changed.
- For a method added by yourself, the name, the delivery time, the destination, the weight limit, the position number and COD availability 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 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 delivery time, the weight limit, the position number and COD availability 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:** Options for real-time shipping rate calculation services can be adjusted through the links [Options >>](#) provided opposite the names of the respective shipping methods (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.



## 3.4.2 Real-time Shipping Calculators

Some carrier companies (like UPS, USPS, FedEx, DHL/Airborne, Canada Post and Australia Post) provide real-time shipping rates that allow users to estimate the cost of shipping by methods provided by these companies. Your X-Cart-based store has shipping modules that enable it to obtain shipping rates from the real-time shipping calculators of such companies and provide your customers with an estimation of shipping cost for orders before they are placed. Integrated shipping modules are provided for UPS, USPS, FedEx, DHL/Airborne, Canada Post and Australia Post. There is also a module allowing your store to obtain shipping rates for UPS, USPS, FedEx, DHL/Airborne through InterShipper rate service.

**Important:** Please be aware that to be able to use shipping modules for obtaining real-time shipping rates, your X-Cart based store will need to meet certain system requirements (See the section [Advanced requirements and recommended settings](#) in the 'System Requirements' chapter of this manual).

To use X-Cart's shipping modules for obtaining real-time shipping rates, you will need an account with each company that you will use to ship products to your customers (except for Australia Post - for which no account is needed) or an account with InterShipper.

**Note.** The real-time calculated rate quote is only an estimation and may be different from the actual charges for your shipment.

Following are instructions for enabling your store to use real-time shipping cost calculators provided by [InterShipper](#), [USPS](#), [FedEx](#), [DHL/Airborne](#), [Canada Post](#) and [Australia Post](#).

For information on setting up your store to use UPS real-time shipping calculator, see the chapter [UPS OnLine® Tools](#) further in this manual.

### 3.4.2.1. InterShipper

To set up real-time shipping cost calculation through InterShipper, follow these steps:

1. If you haven't yet done so, provide your company address in the 'General settings->Company options' section. Make sure you provide this address correctly - it will be submitted to InterShipper real-time shipping calculator as the origin address for all shipments from your store and thus will affect the shipping rates.
2. Obtain an InterShipper account (This can be done at InterShipper website [www.intershipper.com](http://www.intershipper.com)).
3. Enable your store to use InterShipper real-time shipping calculator:
  - a) In your store's administration back-end, go to the 'General settings->Shipping options' section.
  - b) On the 'General settings->Shipping options' page, select the check boxes 'Real-time shipping calculation' and 'If selected, use Intershipper calculation services...'
  - c) In the 'InterShipper account details' subsection of 'General settings->Shipping options'

page, enter your InterShipper username and password.

d) Click the **Save** button.

4. Adjust InterShipper options for your store:

a) Go to the 'Shipping methods' section of your store's administration back-end (Management menu->Shipping methods).

b) In the section menu, click on the link 'Real-time processors options'. A dialog box titled 'InterShipper options' opens.

**InterShipper options** [Manage shipping methods](#)

**Type of delivery:**

**Type of pickup:**

**Length:**

**Width:**

**Height:**

**Dimensional unit code:**

**Package type:**

**Nature of Shipment Contents:**

**Package COD Value in cents:**

**Declared value:**

c) Adjust the settings provided in the 'InterShipper options' dialog box according to your preferences.

d) Click on **Apply**.

That is all. Now you can test whether your store can receive real-time shipping rates correctly. For details, see the chapter '[Testing your store's ability to receive real-time shipping rates](#)' further in this manual.

### 3.4.2.2. USPS

To set up shipping cost calculation through USPS real-time shipping calculator, follow these steps:

1. If you haven't yet done so, provide your own company address in the 'General settings->Company options' section. Make sure you provide this address correctly - it will be submitted to the real-time shipping calculator as the origin address for all shipments from your store and thus will

affect the shipping rates.

2. Obtain an account with USPS (sign up at <http://www.uspswebtools.com/>).
3. Enable your store to use the real-time shipping calculator provided by USPS:
  - a) In your store's administration back-end, go to the 'General settings->Shipping options' section.
  - b) On the 'General settings->Shipping options' page, select the check box 'Real-time shipping calculation'. Unselect the check box 'If selected, use Intershipper calculation services...'.  
c) Use the 'U.S.P.S account details' subsection of 'General settings->Shipping options' page to provide the required information.
4. Adjust USPS options:
  - a) Go to the 'Shipping methods' section of your store's administration back-end (Management menu->Shipping methods).
  - b) Find USPS in the list of real-time shipping methods and click the Options >> link opposite it. A dialog box with USPS options opens.

U.S.P.S. options

[U.S.P.S. shipping methods](#)

**International U.S.P.S.**

Type of Mail:

Value of content:

---

**Domestic U.S.P.S.**

Package Size (length + girth, inches):

Machinable:

Container (Express Mail):

Container (Priority Mail):

Length x Width x Height (required for Priority Mail large pieces, inches):  x  x

Girth (required for non-rectangular Priority Mail large pieces, inches):

First Class Mail Type:

c) Adjust the options according to your preferences.

d) Click on **Apply**.

That is all. Now you can test whether your store can receive real-time shipping rates correctly. For details, see the chapter ['Testing your store's ability to receive real-time shipping rates'](#) further in this manual.

### 3.4.2.3. DHL/Airborne

To set up shipping cost calculation through DHL/Airborne real-time shipping calculator, follow these steps:

1. If you haven't yet done so, provide your own company address in the 'General settings->Company options' section. Make sure you provide this address correctly - it will be submitted to the real-time shipping calculator as the origin address for all shipments from your store and thus will

affect the shipping rates.

2. Obtain an account with DHL/Airborne (Download an application form from <http://www.x-cart.com/download/XCartAPISignupForm.doc>, complete it and submit it to [XMLRequests@dhl.com](mailto:XMLRequests@dhl.com)).
3. Enable your store to use the real-time shipping calculator provided by DHL/Airborne:
  - a) In your store's administration back-end, go to the 'General settings->Shipping options' section.
  - b) On the 'General settings->Shipping options' page, select the check box 'Real-time shipping calculation'. Unselect the check box 'If selected, use Intershipper calculation services...'
  - c) Use the 'DHL / Airborne account details' subsection of 'General settings->Shipping options' page to provide the required information.
4. Adjust DHL/Airborne options:
  - a) Go to the 'Shipping methods' section of your store's administration back-end (Management menu->Shipping methods).
  - b) Find DHL/Airborne in the list of real-time shipping methods and click the Options >> link opposite it. A dialog box with DHL/Airborne options opens.

**Airborne / DHL options**

<b>Packaging type:</b>	Package
<b>Ship in a specified number of days:</b>	1
<b>Package length (inches):</b>	0
<b>Package width (inches):</b>	0
<b>Package height (inches):</b>	0
<b>Additional protection type:</b>	Not required
<b>Additional protection value in \$:</b>	0
<b>Hazardous Materials:</b>	<input type="checkbox"/>
<b>COD payment:</b>	Cashier's Check or Money Order
<b>COD value in \$:</b>	0
<b>Allow customers to provide their own DHL/Airborne account at checkout:</b>	<input type="checkbox"/>

Apply

- c) Adjust the options according to your preferences.
- d) Click on **Apply**.

That is all. Now you can test whether your store can receive real-time shipping rates correctly. For details, see the chapter '[Testing your store's ability to receive real-time shipping rates](#)' further in this manual.

### 3.4.2.4. FedEx

X-Cart has two shipping modules for obtaining shipping rates from FedEx. One of the modules provides integration with FedEx Rate Tools solution, the other one provides integration with FedEx Ship Manager Direct solution. Your store can use just one FedEx solution at a time, so you need to decide which of the two modules you will use.

The module providing integration with FedEx Rate Tools solution has been present in X-Cart for some time now and is well-known to our regular clients. It is notable for being table-based (not truly a 'real-time' solution): it does not contact FedEx server every time a customer needs a shipping quote; instead, it allows you to obtain CSV-formatted shipping rate tables from FedEx. These tables are stored in your store, and, as need arises, the module draws shipping rates from there. This way, the module provides an adequate shipping cost estimation to your customers in most cases; however, to keep it adequate, you need to update your FedEx tables often enough.

The module providing integration with FedEx Ship Manager Direct solution has been available in X-Cart from the version 4.1.5. Unlike FedEx Rate Tools, it is a truly real-time solution: it sends a request for a shipping quote to FedEx server whenever a customer selects or changes a shipping method on checkout. This way the module always provides your customers with the most up-to-date shipping rates. To be able to use this solution, you need to complete end-user certification with FedEx. Instructions for completing the certification are available at [http://www.x-cart.com/articles/fedex\\_shipping\\_rates.html](http://www.x-cart.com/articles/fedex_shipping_rates.html).

### Setting up shipping cost calculation for FedEx

To set up shipping cost calculation for FedEx using one of X-Cart's FedEx modules, follow these steps:

1. If you haven't yet done so, provide your own company address in the 'General settings->Company options' section. Make sure you provide this address correctly - it will be submitted to the real-time shipping calculator as the origin address for all shipments from your store and thus will affect the shipping rates.
2. Obtain an account with FedEx (Contact FedEx for details).
3. Enable your store to use the real-time shipping calculator provided by FedEx:
  - a) In your store's administration back-end, go to the 'General settings->Shipping options' section.
  - b) On the 'General settings->Shipping options' page, select the check box 'Real-time shipping calculation'. Unselect the check box 'If selected, use Intershipper calculation services...'
  - c) Use the 'FedEx account details' subsection of 'General settings->Shipping options' page to provide the required information.
4. Adjust FedEx options:

- a) Go to the 'Shipping methods' section of your store's administration back-end (Management menu->Shipping methods).
- b) Find FedEx in the list of real-time shipping methods and click the [Options >>](#) link opposite it. A dialog box with FedEx options opens.
- c) Select the integration method that you are going to use:  
Depending on the integration method currently selected, the 'Integration method' line at the top of the 'FedEx options' dialog box will say either 'FedEx Rate Tools' or 'FedEx Ship Manager Direct'. If the currently selected integration method is the one you are going to use, just leave it be. If, however, you need a different integration method, change the currently selected method using the **Modify** button next to the method name (re-select the integration method and click on **Apply**).

**FedEx options**

Select an integration method you would like to use: [FedEx shipping methods](#)

**FedEx Rate Tools**  
An offline integration method based on FedEx Rate Tools allows you to obtain shipping rates from the text files provided on FedEx website. You need to upload the text files just once. FedEx reserves the right to modify its services and zone structure without notice, so the rates calculated through this integration method can become outdated.

**FedEx Ship Manager Direct**  
An online integration method based on FedEx Direct XML transactions allows you to get up-to-date shipping rates from FedEx. This method requires that you have a FedEx account number and an HTTPS module installed to communicate with FedEx server.

- d) Adjust [FedEx options](#) according to your preferences.
- e) Click on **Apply**.

That is all. Now you can test whether your store can receive real-time shipping rates correctly. For details, see the chapter [Testing your store's ability to receive real-time shipping rates](#) further in this manual.

## Adjusting FedEx options

### FedEx Rate Tools

To adjust options for FedEx Rate Tools:

### FedEx options

[FedEx shipping methods](#)

**Integration method:** FedEx Rate Tools [Modify](#) >

**Company type:**

**Packaging:**

**Ship to Residence:**

---

#### Fuel surcharges

Changes to the FedEx Express and FedEx Ground fuel surcharges will be applied effective the first Monday of each month. You can see it [here](#).

**FedEx Express (%):**

**FedEx Ground (%):**

---

#### Import rates data

**Origin zip code**

**Date of zip code import**

Shipping Methods/Zones	Date of import
<b>Server path to files</b>	<input type="text" value="/u/xcart/public_html/eshop_dohur/st"/>

[Read more about importing here...](#)

1. From the drop-down box 'Company type', select *FedEx Ground*, *FedEx Express* or both.
2. From the drop-down box 'Packaging', select the type of packaging you wish to use.
3. Adjust the drop-down box 'Ship to Residence' (If you set it to Yes, the FedEx Home Delivery method will be available).
4. Set the fuel surcharges. This is important to get the correct rates. You can find the most current fuel surcharges here: <http://www.fedex.com/us/services/fuelsurcharge.html>. Keep these settings up to date, as they change frequently.
5. Click the **Apply** button to save the changes.

After the options have been adjusted, obtain rate data from FedEx and import into your store:

1. Go to <http://www.fedex.com/ratetools/RateToolsMain.do>



2. In the section 'Get FedEx Zone Locators':
  - a) Select the 'All ZIP codes' checkbox.
  - b) Choose ASCII as the File format.
  - c) Click the button **Get zone locator >>**.
3. In the window that will be opened, click the button **Download rates** to download the rate tables archive file.
4. Use your favorite archiver program to uncompress the archive and put the resulting files into the folder on your server that is specified in the 'Server path to files' parameter (by default - /shipping/FedEx). Please note that if you have already performed this operation before, this folder already contains your old files with FedEx rate tables - these need to be replaced by the files from the uncompressed archive.
5. To import the rate tables that you have placed in the 'Server path to files' folder into X-Cart, click the **Import** button.

If the import was successful, you should see a date of import for each method, as well as an import date and Origin Zip Code. If you do not see this information, the import was NOT successful and the real-time rates will not work!

### **FedEx Ship Manager Direct**

Before you can enable FedEx Ship Manager Direct, you need to obtain a *meter number* from FedEx. X-Cart can obtain this number for you. For that, it will need you to provide your FedEx account number (by this time you should have provided it on the 'General settings->Shipping options' page) and to complete the form on the 'FedEx options' page (Fields marked by asterisks are required):

### FedEx options

[FedEx shipping methods](#)

**Integration method: FedEx Ship Manager Direct** [Modify](#) 

Before you can enable FedEx shipping module, you need to subscribe to the FedEx services. To do so, complete the form below and click the 'Get the FedEx meter number' button.


A unique meter number specific to your FedEx account number will be returned and stored for further use in all the communications of the shopping cart with FedEx.

<b>Person name:</b>	*	<input type="text" value="Admin Admin"/>
<b>Company name:</b>		<input type="text" value="Your Company Name"/>
<b>Phone number:</b>	*	<input type="text" value="18005555555"/>
<b>Pager number:</b>		<input type="text"/>
<b>Fax number:</b>		<input type="text"/>
<b>E-mail address:</b>		<input type="text"/>
<b>Address:</b>	*	<input type="text" value="Test address"/>
<b>Address (line 2):</b>		<input type="text"/>
<b>City:</b>	*	<input type="text" value="Test city"/>
<b>State/Province:</b>	*	<input type="text" value="California"/>
<b>Postal code:</b>	*	<input type="text" value="50001"/>
<b>Country:</b>	*	<input type="text" value="United States"/>

Provided that the information you entered is correct, after clicking the button **Get the FedEx meter number**, you should be able to see the next section of 'FedEx options' - with your meter number displayed at its top:

### FedEx options

[FedEx shipping methods](#)

**Integration method: FedEx Ship Manager Direct** [Modify](#) 

You are currently subscribed to the FedEx services and have got a Meter Number stored. To get a new Meter Number, click the button below to clear the existing Meter Number, then generate the Meter Number again.

**FedEx meter number:** 123

Specify the options that will be used for getting shipping rates from FedEx:

**Carrier type:**

**Packaging (FedEx Express):**

**Packaging (FedEx Ground):**

**Dropoff type:**

**Ship date (days):**

**Currency code:**

---

**Dimensions**

**Length x Width x Height (inches):**  x  x

---

**COD**

**COD value (USD):**

---

**Handling charges**

**Charge amount:**

Now specify the options that will be used for getting shipping rates from FedEx:

1. From the drop-down box 'Carrier type', select *FedEx Ground*, *FedEx Express* or both.
2. From the drop-down boxes 'Packaging (FedEx Express)' and 'Packaging (FedEx Ground)', select the types of packaging you wish to use for FedEx Express and FedEx Ground.
3. From the drop-down box 'Dropoff type', select your desired dropoff type.

4. Specify the desired 'Ship date (days)'.
5. From the drop-down box 'Currency code', select the necessary currency code.
6. Specify the dimensions for your shipments.
7. Adjust COD settings (value and type).
8. Specify special services, as needed.
9. Use the 'Charge amount' field to specify your handling charge.
10. Click the **Apply** button.

### 3.4.2.5. Canada Post

To set up shipping cost calculation through Canada Post real-time shipping calculator, follow these steps:

1. If you haven't yet done so, provide your own company address in the 'General settings->Company options' section. Make sure you provide this address correctly - it will be submitted to the real-time shipping calculator as the origin address for all shipments from your store and thus will affect the shipping rates.
2. Obtain an account with Canada Post (Sign up at <http://www.canadapost.ca/>).
3. Enable your store to use the real-time shipping calculator provided by Canada Post:
  - a) In your store's administration back-end, go to the 'General settings->Shipping options' section.
  - b) On the 'General settings->Shipping options' page, select the check box 'Real-time shipping calculation'. Unselect the check box 'If selected, use Intershipper calculation services...'
  - c) Use the 'Canada Post account details' subsection of 'General settings->Shipping options' page to provide the required information.
4. Adjust Canada Post options:
  - a) Go to the 'Shipping methods' section of your store's administration back-end (Management menu->Shipping methods).
  - b) Find Canada Post in the list of real-time shipping methods and click the Options >> link opposite it. A dialog box with Canada Post options opens.

**Canada Post options**

Canada Post shipping methods

**Item description:**

**Item length in cm:**

**Item width in cm:**

**Item height in cm:**

**Package insured value in CA \$:**

**Shipping cost conversion rate:**   
The shipping cost is always returned in Canadian Dollars. So you need to specify the conversion rate to convert the shipping cost returned by CanadaPost service into the necessary currency.

- c) Adjust the options according to your preferences.
- d) Click on **Apply**.

That is all. Now you can test whether your store can receive real-time shipping rates correctly. For details, see the chapter 'Testing your store's ability to receive real-time shipping rates' further in this manual.

### 3.4.2.6. Australia Post

To set up shipping cost calculation through Australia Post real-time shipping calculator, follow these steps:

1. If you haven't yet done so, provide your own company address in the 'General settings->Company options' section. Make sure you provide this address correctly - it will be submitted to the real-time shipping calculator as the origin address for all shipments from your store and thus will affect the shipping rates.
2. Enable your store to use the real-time shipping calculator provided by Australia Post:
  - a) In your store's administration back-end, go to the 'General settings->Shipping options' section.
  - b) On the 'General settings->Shipping options' page, select the check box 'Real-time shipping calculation'. Unselect the check box 'If selected, use Intershipper calculation services...'
3. Adjust Australia Post options:
  - a) Go to the 'Shipping methods' section of your store's administration back-end (Management menu->Shipping methods).
  - b) Find Australia Post in the list of real-time shipping methods and click the Options\_>> link opposite it. A dialog box with Australia Post options opens.

- c) Adjust the options according to your preferences.
- d) Click on **Apply**.

That is all. Now you can test whether your store can receive real-time shipping rates correctly. For details, see the chapter 'Testing your store's ability to receive real-time shipping rates' further in this manual.

### 3.4.2.7. Testing Your Store's Ability to Receive Real-time Shipping Rates

You can test your store's ability to receive real-time shipping rates:

1. Go to the 'Test realtime shipping' page:

- Go to the 'Shipping methods' section of the store's administration back-end (Management menu->Shipping methods) and click on the link 'Test Real-time Shipping Rates Calculation' in the section menu.

OR

- Go to the 'General options->Shipping settings' page, scroll down to the 'Test Realtime Shipping Rates Calculation' subsection and click the **Test** button.

A dialog box titled 'Test destination shipping address' opens.

2. In the 'Test destination shipping address' dialog box:

- a) Enter a test destination address.
- b) In the 'Weight (<units>)' field, specify package weight.

**Note:** Units of weight can be re-defined in the 'General settings->General options' section: see the options 'Weight symbol' and 'Grams in the unit of weight defined by the weight symbol');

- c) (*Needs to be done only when UPS OnLine® Tools module is enabled*) From the 'Select a carrier' field, select, whether you wish to receive rates for *United Parcel Service* or *Other carriers*.
- d) Click the **Submit** button.

If X-Cart is able to submit your request to the selected real-time shipping calculator, in the space below the 'Test destination shipping address' dialog box you should be able to see your request and the calculator's response in XML format. If the store is able to receive rates from the calculator, you should also be able to see a list of received shipping rates displayed below the response section.

### 3.4.3 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:

$$\text{SHIPPING} = \text{Rate} + \text{TOTAL\_WEIGHT} * \text{Weight\_Rate} + \text{ITEMS} * \text{Item\_Rate} + \text{SUM} * \text{Percent\_Rate} / 100$$

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).

## Defining 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.

For orders with total over \$100 shipping charge will be \$5 (flat charge) plus \$3 for each lb (per lbs charge)

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 minimum and maximum weight and order subtotal values.

**Note:** To define 'unlimited' weight and order subtotal amount, enter a huge value like 999999.9 (set by default).

- Enter the appropriate values into the Flat charge, Percent charge, Per item charge and Per lb. charge fields (These values will be used in shipping charges calculations as described in the shipping formula above).

**Flat charge** 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)

**Percent charge** - 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 charge** is a fixed amount charged for each item in the shopping cart.

**Per lb charge** is a fixed amount charged for each lb of the order weight.


The values in these fields can be combined.

4. Click on **Add**.



## Modifying 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.



**Edit charges for**

Airborne Ground (National) All zones

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 charge, Percent charge, Per item charge and Per lb. charge fields)
4. Click on **Update**.

## Deleting 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. Use the check box next to the shipping method name to select or unselect all the charges for this shipping method.
4. Click on **Delete selected**.

### 3.4.4 Shipping Markups

To be able to use the 'Shipping markups' section make sure you enable real-time shipping calculation in the 'General settings' -> 'Shipping options' section.

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.

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

$$\text{SHIPPING} = \text{Rate} + \text{Markup} + \text{TOTAL\_WEIGHT} * \text{Weight\_Markup} + \text{ITEMS} * \text{Item\_Markup} + \text{SUM} * \text{Percent\_Markup} / 100$$

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.

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

### Zone Default

<input type="checkbox"/> DHL/Airborne Express 10:30 AM (National)						
<input type="checkbox"/>	Weight range:	<input type="text" value="5.00"/>	-	<input type="text" value="9.99"/>	Flat charge (\$): <input type="text" value="0.00"/>	Percent charge (%): <input type="text" value="0.00"/>
<input type="checkbox"/>	Order subtotal range:	<input type="text" value="0.00"/>	-	<input type="text" value="999999.9"/>	Per item charge (\$): <input type="text" value="0.00"/>	Per lbs charge (\$): <input type="text" value="1.00"/>
<input type="checkbox"/>	Weight range:	<input type="text" value="10.00"/>	-	<input type="text" value="19.99"/>	Flat charge (\$): <input type="text" value="15.00"/>	Percent charge (%): <input type="text" value="0.00"/>
<input type="checkbox"/>	Order subtotal range:	<input type="text" value="0.00"/>	-	<input type="text" value="999999.9"/>	Per item charge (\$): <input type="text" value="0.50"/>	Per lbs charge (\$): <input type="text" value="0.00"/>
		<input type="button" value="Delete selected"/>		<input type="button" value="Update"/>		

1. For packages that weigh 5.00-10.00 lbs, \$1 per each pound will be added to the rate returned by the real-time calculation service.

2. For packages that weigh 10.00-20.00 lbs, a flat charge of \$15 will be added to the rate returned by the real-time calculation service, plus \$0.50 will be added per each item in the package.

Defining markups is similar to defining shipping charges.

### 3.4.5 Setting up Shipping

In this section we will walk you through the process of shipping setup step-by-step. Please note that the shipping rates and methods are given as samples only. Use your own rates and methods when setting up shipping in your store.

Shipping system in X-Cart is based on the correct setup of the 3 main parameters:

1. [Shipping Methods](#)
2. [Destination Zones](#)
3. [Shipping Charges](#)

#### Step 1. Desired shipping rates

First of all you need to decide exactly, which shipping method (or methods) you will use. You might want to use different shipping methods for certain package weight ranges, or for certain order subtotals; you might want to charge a flat charge, per item charge, percent charge or a combination of the above. In our example we will define charges depending on package weight.

Here are the shipping charges we want to set up:

#### UK:

weight range, kg	shipping charge, GBP	shipping method
0-1	3.00	Royal Mail 1st Class
1-2	5.00	Royal Mail 1st Class
2+	9.00	City Link

#### EU - EUROPEAN UNION:

weight range, kg	shipping charge, GBP	shipping method
0-1	5.00	Royal Mail Airmail
1-2	10.00	Parcelforce International
2+	30.00	Parcelforce International

#### USA / CANADA / FAR EAST & AUSTRALIA:

weight range, kg	shipping charge, GBP	shipping method
0-1	8.00	Royal Mail Airmail
1-2	18.00	Royal Mail International Signed For

2+	43.00	Parcelforce International
----	-------	---------------------------

### REST OF WORLD:

weight range, kg	shipping charge, GBP	shipping method
0-1	8.00	Royal Mail Airmail
1-2	18.00	Royal Mail International Signed For
2+	55.00	Parcelforce International

## Step 2. Creating shipping methods

[Create manually defined shipping methods](#) you are going to use. The ones we need are as follows:

### National

1. Royal Mail 1st Class
2. City Link

### International

3. Royal Mail Airmail
4. Royal Mail International Signed For
5. Parcelforce International

So there should be 5 manually defined shipping methods set in the 'Shipping Methods' section of the cart admin area.

## Step 3. Defining destination zones

Now it's necessary to [define the destination zones](#) you are going to use. This can be done in the 'Inventory' -> 'Destination zones' section. The zones should be as follows:

1. UK
2. EU (European Union)
3. USA / CANADA / FAR EAST & AUSTRALIA
4. REST OF WORLD

**Note:** Please be warned that you should not use one and the same country for 2 different destination zones. This will lead to the rates mess up.

## Step 4. Setting up shipping rates

Once the shipping methods and the destination zones are defined you can set up rates in the 'Inventory' -> 'Shipping charges' section. Read more how to configure the charges in the [Shipping charges](#)

section.

You should get the following rules (sample for UK):

### 1. Royal Mail 1st Class/UK

**UK**

---

**Royal Mail 1st Class (National)**

<input type="checkbox"/>	Weight range:	<input type="text" value="0.00"/>	-	<input type="text" value="0.99"/>	Flat charge (\$):	<input type="text" value="3.00"/>	Percent charge (%):	<input type="text" value="0.00"/>
<input type="checkbox"/>	Order subtotal range:	<input type="text" value="0.00"/>	-	<input type="text" value="999999.9"/>	Per item charge (\$):	<input type="text" value="0.00"/>	Per lbs charge (\$):	<input type="text" value="0.00"/>
<input type="checkbox"/>	Weight range:	<input type="text" value="1.00"/>	-	<input type="text" value="1.99"/>	Flat charge (\$):	<input type="text" value="5.00"/>	Percent charge (%):	<input type="text" value="0.00"/>
<input type="checkbox"/>	Order subtotal range:	<input type="text" value="0.00"/>	-	<input type="text" value="999999.9"/>	Per item charge (\$):	<input type="text" value="0.00"/>	Per lbs charge (\$):	<input type="text" value="0.00"/>

### 2. City Link/UK

**UK**

---

**City Link (National)**

<input type="checkbox"/>	Weight range:	<input type="text" value="2.00"/>	-	<input type="text" value="999999.9"/>	Flat charge (\$):	<input type="text" value="9.00"/>	Percent charge (%):	<input type="text" value="0.00"/>
<input type="checkbox"/>	Order subtotal range:	<input type="text" value="0.00"/>	-	<input type="text" value="999999.9"/>	Per item charge (\$):	<input type="text" value="0.00"/>	Per lbs charge (\$):	<input type="text" value="0.00"/>

The rates for all other zones should be configured likewise. Please do note when you use one shipping method for one destination zone, you should define all rates for this method within one rule.

Once all shipping charges are defined, you should enable shipping for all the products in the cart. To do so check the 'General Settings' -> 'Shipping options' configuration and choose the options you like.

## 3.5 Tax Settings

### Tax settings in X-Cart

X-Cart provides you with a flexible tool for defining taxes to be used in your store. Simple settings allow you to define virtually any tax and tax rate. For each tax you can define how it needs to be calculated, to what products it needs to be applied, how information about it needs to be displayed to customers, etc. You can make taxes dependent on the customer's location (billing or shipping address) and on the customer's membership. Customers coming from a certain location and having a certain membership will

see just the tax rates for their destination zone and membership level, while the other tax rates will be hidden. X-Cart also allows you to have non-taxable products at your store.

## Roles in tax settings management

If you are an X-Cart GOLD administrator/provider:

- You can define taxes (See the chapter [Taxes](#)).
- You can define taxes options (See the chapter [Taxes Options](#)).
- You can define tax rates (See the chapter [Tax Rates](#)).
- You can apply taxes to products (See the chapter [Applying Taxes to Products](#)).

If you are an X-Cart PRO administrator:

- You can define taxes (See the chapter [Taxes](#)).
- You can define taxes options (See the chapter [Taxes Options](#)).
- You can apply taxes to products (See the chapter [Applying Taxes to Products](#)).

If you are an X-Cart PRO provider:

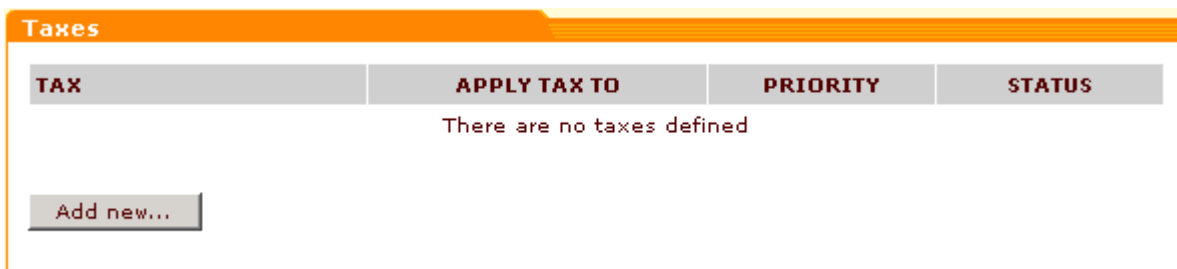
- You can define tax rates for your products (See the chapter [Tax Rates](#)).
- You can apply taxes to your products (See the chapter [Applying Taxes to Products](#)).

## 3.5.1 Taxes

### Adding taxes

To add a tax:

1. Go to the 'Taxes' section of your store's administration back-end (Management menu->Taxing system). A dialog box titled 'Taxes' opens:



Before you have created any taxes, the dialog box is empty.

2. In the 'Taxes' dialog box, click the **Add new...** button. A dialog box 'Tax details' opens.

### Tax details

[Taxes list](#) **Go**

**Tax service name:** \*

**Tax display name:**

**Tax registration number:**

**Priority:**

**Status:** \*

**Apply tax to:** \*

**Rates depend on:** \*   
 **Included into the product price**  
 **Display product price including tax**  
**Also display (on the products list, product details and cart pages):**

3. Define the details of the desired tax by completing the fields of the 'Tax details' dialog box (The fields marked by a red asterisk sign are mandatory):

- **Tax service name:** Unique name by which X-Cart application will identify this tax; may consist of letters (A-Z, a-z) and digits (0-9) and may not exceed 10 characters in length. This value will not appear anywhere in your store's customer zone.
- **Tax display name:** Name of the tax as it will appear to customers. If necessary, you can define a different tax display name for each of the languages used in your store. To add a tax display name in another language, select the necessary language from the Current language selector at the top of the page, enter the tax display name in this language into the appropriate field and click on **Save**.
- **Tax registration number:** Tax registration number (required for certain types of taxes; appears on the invoice)
- **Tax priority:** Number defining the order in which the tax needs to be applied (relative to the other taxes).

- Status: Tax status (*Enabled* or *Disabled*).
- Apply tax to: Tax base. Use the [tax formula editor](#) to create the formula according to which this tax needs be applied.
- Rates depend on: Select if the tax rate should be calculated for *Shipping Address* or *Billing Address*.
- Included into the product price: This option defines whether the prices of products to which this tax applies are stored in the database with this tax included or excluded. If you want the product prices to be inclusive of this tax, select this check box. If you leave this check box unselected, the prices will be tax-exclusive.

**Important:** The option 'Included into the product price' should only be enabled for taxes whose rate is not supposed to change depending on the customer's address. If your store has products to which more than one taxes should be applied, you need to make sure that the option 'Included into the product price' is enabled for no more than one of the taxes applied to any such product.

- Display product price including tax: This option defines whether the prices of products to which this tax applies are displayed to customers with this tax included or excluded. If you want the product prices to be displayed as inclusive of this tax, select this check box. If you leave this check box unselected, the prices will appear tax-exclusive.
  - Also display (on the products list, product details and cart pages): This option is used in conjunction with the option 'Display product price including tax' and defines what needs to be displayed on the named pages of your store besides the price with the included tax (*Nothing, Rate value, Calculated tax cost, Rate value and tax cost*).
4. Click on **Save**. The tax will be created and added to the list of your store's taxes. To view the list of your store's taxes, you can click the [Taxes list](#) link at the top right-hand corner of the 'Tax details' dialog box.

Now that the tax has been created, it is possible to add tax rates for it. See the chapter [Tax Rates](#).

After the necessary taxes have been defined, be sure to set the options affecting how all taxes in your store are applied and displayed. See the chapter [Taxes Options](#).

Also, please be aware that, before the taxes you have created become functional, they will need to be applied to products. See the chapter [Applying Taxes to Products](#).

## Managing Taxes

The 'Taxes' dialog box in the 'Taxes' section of your store's administration back-end shows all the taxes defined in your store. When you have some taxes defined, it looks similar to this:



TAX	APPLY TAX TO	PRIORITY	STATUS
<input type="checkbox"/> <a href="#">VAT17 5</a>	<a href="#">DST+SH</a>	<input type="text" value="10"/>	<input type="text" value="Enabled"/>
<input type="checkbox"/> <a href="#">VAT5</a>	<a href="#">DST+SH</a>	<input type="text" value="20"/>	<input type="text" value="Enabled"/>

Update      Delete selected

Add new...

The table columns provide the following information about each tax:

- TAX - Service tax name.
- APPLY TAX TO - Tax base as defined in the 'Apply tax to' field of the 'Tax details'.
- PRIORITY - Order in which the tax needs to be applied (relative to the other taxes).
- STATUS - Enabled or disabled.

To edit the details of a tax:

1. Click on the name link of the tax that needs to be edited. The 'Tax details' dialog box displaying the details of the selected tax opens.
2. Edit the tax details.
3. Click the **Save** button at the bottom of the 'Tax details' dialog box to save the changes.

To change the order in which your taxes should be applied:

1. Change the order numbers in the PRIORITY column (The tax with the highest priority needs to have the smallest order number, the tax with the lowest priority - the greatest order number).
2. Click the **Update** button.

To temporarily disable a tax or to re-enable a disabled tax:

1. Select the appropriate status from the STATUS drop-down box opposite the name of the tax.
2. Click the **Update** button.

To delete a tax:

1. Select the check box next to the name of the tax that needs to be deleted. (You can use the [Check all](#) / [Uncheck all](#) links to select or unselect all the taxes on the page).
2. Click the **Delete selected** button.

## 3.5.2 Tax Rates

### Adding tax rates

After the necessary taxes have been defined, you need to define tax rates for each tax.

**Important:** Before you begin defining tax rates for a certain tax, make sure that all the [destination zones](#) and [membership levels](#) to which the tax needs to be applied are defined.

To define a tax rate:

1. *If you are an X-Cart GOLD administrator/provider:*

Go to the 'Taxes' section of your store's administration back-end (Management menu->Taxing system).

In the dialog box titled 'Taxes', find the tax for which you would like to add rates and click on its name. The 'Tax details' section of your store opens. Scroll down through the 'Tax details' dialog box. You should see a dialog box titled '<Tax name>: Tax rates' (where '<Tax name>' is the name of the tax whose details are being displayed).

*If you are an X-Cart PRO provider:*

Go to the 'Tax rates' section ( Inventory menu->Tax rates). You should see a dialog box 'Taxes' displaying the names of all taxes defined for your store by the store administrator (The expression '*N rates defined*' displayed in brackets next to each of the tax names shows the number of tax rates defined by you for these taxes. Before you have defined any rates, this number is 0 (zero)).

In the 'Taxes' dialog box, find the tax for which you would like to add rates and click on its name. The 'Tax details' section of your store opens. On the page, you should see a box titled 'Tax details' displaying the details of the selected tax as defined by the store administrator:

Tax details	
<b>Tax service name:</b>	VAT17_5
<b>Tax display name:</b>	VAT 17.5%
<b>Status:</b>	Enabled
<b>Apply tax to:</b>	DST+SH
<b>Rates depended on:</b>	Shipping Address

[Taxes list](#) **Go**

**Note:** To return to the list of your store's taxes, you can click the [Taxes list](#) link at the top right-hand corner of the 'Tax details' box.

Below the 'Tax details' box, you should see a dialog box titled '<Tax name>: Tax rates' (where '<Tax name>' is the name of the tax whose details are being displayed).

2. Turn to the '<Tax name>: Tax rates' dialog box:

**VAT17\_5: Tax rates**

**Tax rates**

[Check all](#) / [Uncheck all](#)

ZONE	MEMBERSHIP	RATE VALUE	APPLY TAX TO

**Add tax rate**

**Rate value:** \*

**Zone:** \*

**Membership:** \*

**Apply tax to:**

3. Define the details of the tax rate by completing the fields of the 'Add tax rate' subsection of the '<Tax name>: Tax rates' dialog box:

- **Rate value:** Tax rate value (Use the drop-down box next to the 'Rate value' field to define whether the tax rate should be an absolute or percentage value).

**Note:** please keep in mind that if you define absolute tax value, for example, \$3 this value can happens to be greater than a product price. This may result in negative product prices. In this case customers will be able to see such products, but not allowed to buy them. A message will appear saying that the product has been configured incorrectly and cannot be added to cart. The customer will be asked to contact the store administrator with a buying request.

- **Zone:** Destination zone to which the rate needs to be applied.
- **Membership:** Membership level to which the rate needs to be applied.
- **Apply tax to:** Tax base. This field needs to be completed in the '<Tax name>: Tax rates' dialog box only if the tax base for the different destination zones and membership levels to which the tax will be applied needs to be different from the value defined by the store administrator in the 'Apply tax to' field of the 'Tax details' dialog box.

To complete the field, use the [tax formula editor](#).

4. Click the **Add** button to save the changes. The new rate will be created and added to the list of tax

rates for the tax.

VAT17\_5: Tax rates

### Tax rates

[Check all](#) / [Uncheck all](#)

ZONE	MEMBERSHIP	RATE VALUE	APPLY TAX TO
<input type="checkbox"/> Zone Default	<u>All</u>	17.500 %	<u>DST+SH</u>

---

### Add tax rate

**Rate value:** \*  %

**Zone:** \*

**Membership:** \*

=

**Apply tax to:**

After you have added the necessary tax rates for a tax, be sure to [apply](#) the tax to all the products to which it needs to be applied.

## Managing tax rates

Tax rates can be managed from the '<Tax name>: Tax rates' dialog box. X-Cart allows you to view, edit and delete tax rates.

To change the value of a tax rate:

1. In the 'Taxes' dialog box, find the tax rate that you would like to change and click on its name. The 'Tax details' section opens.
2. In the '<Tax name>: Tax rates' dialog box, find the rate that you wish to change.
3. Change the value of the 'Rate value' field specifying whether the value is absolute or percentage.

4. Click the **Update** button.

To edit the details of a tax rate:

1. In the 'Taxes' dialog box, find the tax rate that you would like to change and click on its name. The 'Tax details' section opens.
2. In the '<Tax name>: Tax rates' dialog box, find the rate whose details you wish to edit.
3. Click either on the membership link (MEMBERSHIP column) or on the tax formula link (APPLY TAX TO column) corresponding to this rate. The rate details appear in the 'Edit tax rate' subsection of the '<Tax name>: Tax rates' dialog box.
4. Change the necessary tax rate details (rate value, destination zone, membership level, tax base formula).
5. Click the **Update** button.

To delete a tax rate:

1. In the 'Taxes' dialog box, click on the name of the tax whose rate you wish to delete. The 'Tax details' section opens.
2. In the '<Tax name>: Tax rates' dialog box, find the rate you wish to delete.
3. Select the check box next to this rate. You can use the Check all / Uncheck all links to select or unselect all the rates displayed on the page.
4. Click on **Delete selected**.

### 3.5.3 Tax Formula Editor

The 'Apply tax to' subsection of the 'Tax details' and '<Tax name>: Tax details' dialog boxes allows you to create and edit a formula defining what the tax being edited needs to be applied to.

Apply tax to: \*

=DST+SH

Undo Redo Clear

+ - \* /

Add

Add

The field at the top of the editor is intended for your tax base formula. The formula field is not manually editable - to enter your formula into this field, you will need to provide components for the formula using the fields and buttons below. Your formula will be assembled from the components you provide.

It is possible to provide the following components:

- mathematical signs (plus, minus, multiplication, division);

- variables symbolically representing objects that need to be taxed or should be used for calculating the tax (subtotal amount, discounted subtotal amount, shipping cost, amount levied in the form of some other tax defined in your store and applied to the purchase);
- numbers.

Mathematical signs are used to indicate the operations that need to be performed on the other components of the formula. They can be added to the formula by clicking the appropriate buttons: [ + ] for addition, [ - ] for subtraction, [ \* ] for multiplication, and [ / ] for division.

Variables can be selected from the drop-down box below the row of buttons with mathematical signs. In the list of variables that can be selected, *ST* stands for 'Subtotal amount', *DST* - for 'Discounted subtotal amount', *SH* - for 'Shipping cost'. Taxes are labeled by their own names. To add a variable, select it from the drop-down box and click the **Add** button next to it.

Numbers can be added using the input field located below the drop-down box with the list of available variables. To add a number, simply type it into the input field and click the **Add** button on the right-hand side of the field.

For example, if you want your tax to be applied to the sum of discounted order subtotal and shipping cost:

- a) Select *DST* from the drop-down box, click on **Add**.
- b) Click on [ + ].
- c) Select *SH* from the drop-down box, click on **Add**.

You can cancel the latest action using the **Undo** button, re-apply the change after the cancellation by clicking the **Redo** button, and clear the formula field by clicking the **Clear** button.

### 3.5.4 Taxes Options

After you have created at least one tax, a dialog box titled 'Taxes options' appears below the 'Taxes' dialog box in the 'Taxes' section. This dialog box provides some options allowing you to choose how you want your taxes to be applied and displayed. The options in this dialog box affect all the taxes in your store in general.

**Taxes options**

Display cart/order totals including tax:

Display a tax rate for each product in cart/order:

Enable tax exemption for customers:

Allow customers to modify their tax number after tax exemption is enabled:

The following options are provided:

- Display cart/order totals including tax: This option defines whether tax cost is displayed included in the order totals or not. When this option is disabled, the order totals on the 'Payment details' page of checkout are displayed like this:

Payment details				
Qty	SKU	Product	Price	Total
1	SKU17513	Product_1	\$100.00	\$100.00
1	SKU17514	Product_2	\$49.00	\$49.00
			<b>Delivery method: <u>UPS 2nd Day Air®</u></b>	
			<b>Subtotal: \$149.00</b> (€ 129.63)	
			<b>Shipping cost: \$13.73</b> (€ 11.95)	
			<b>Sales tax 5%: \$7.45</b> (€ 6.48)	
			<b>TOTAL: \$170.18</b> (€ 148.06)	

When this option is enabled, the order totals are displayed like this:

Payment details				
Qty	SKU	Product	Price	Total
1	SKU17513	Product_1	\$100.00	\$100.00
1	SKU17514	Product_2	\$49.00	\$49.00
			<b>Delivery method: <u>UPS 2nd Day Air®</u></b>	
			<b>Subtotal: \$156.45</b> (€ 136.11)	
			<b>Shipping cost: \$13.73</b> (€ 11.95)	
			<b>TOTAL: \$170.18</b> (€ 148.06)	
			<b>Including:</b>	
			Sales tax: \$7.45 (€ 6.48)	

**Note:** please keep in mind that if you select to display order totals including tax, all the discount coupon sums will also be counted as

including tax.

- Display a tax rate for each product in cart/order: This option defines whether tax rates are displayed for each product being ordered. When this option is enabled, the information about the products being ordered is displayed like this:

Payment details					
Qty	SKU	Product	Tax	Price	Total
1	SKU17513	Product_1	Sales tax:5%	\$100.00	\$100.00
1	SKU17514	Product_2	Sales tax:5%	\$49.00	\$49.00
<b>Delivery method: <u>UPS 2nd Day Air®</u></b>					
<b>Subtotal:</b>				<b>\$149.00</b>	(€ 129.63)
<b>Shipping cost:</b>				<b>\$13.73</b>	(€ 11.95)
<b>Sales tax 5%:</b>				<b>\$7.45</b>	(€ 6.48)
<b>TOTAL:</b>				<b>\$170.18</b>	(€ 148.06)

When this option is disabled, the column with tax rates for each product is not displayed.

- Enable tax exemption for customers: This option defines whether tax exemption feature for customers is enabled at your store or not. When this option is enabled, a check box 'Tax exemption' is added to the 'Profile details' page for customers.

**Note:** You can use this check box to specify whether the customer should be taxed or not (A selected check box corresponds to 'This customer is should not be taxed', an unselected check box - to 'This customer should be taxed').

When this option is disabled, the 'Tax exemption' check box does not appear.

- Allow customers to modify their tax number after tax exemption is enabled: This option defines whether customers can modify their tax number after tax exemption has been enabled in their profile. You may want to keep this option disabled to prevent customers from changing their tax numbers without your knowing.

**Note:** This option works only if the field 'Tax number' is enabled for customer user profiles via General settings->User Profiles options and the option 'Enable tax exemption for customers' is enabled.

To adjust the options:

1. Select the check boxes for the options that need to be enabled. Unselect the check boxes for the options that need to be disabled.
2. Click the **Update** button to apply the changes.



## 3.5.5 Applying Taxes to Products

After the necessary taxes have been configured, they need to be applied to products. This step is very important, because taxes will not work until you tell X-Cart to which products you wish them applied to.

The 'Product details' dialog box (the one you will use to add/modify products - see the section [Adding Products](#) further in this manual for details) contains a field 'Apply tax'. This field is a selectbox providing names of all taxes defined in the store. When creating a new product, you will use the 'Apply tax' field to apply taxes to your products.

To apply one or more taxes to a product:

1. Find the product to which you would like to apply taxes and open it for modification. A dialog box titled 'Product details' opens.
2. In the 'Apply tax' field of the 'Product details' dialog box, highlight the name of the tax that needs to be applied to the product. If you need to highlight more than one tax, hold down the CTRL key while selecting the desired names of taxes with your mouse.
3. Click the **Save** button to apply the changes.

If the same tax or set of taxes need to be applied to more than one product, you can apply them simultaneously to multiple products by editing them in batch. Instructions for mass-editing of products are provided in the section [Group product editing](#) of the chapter [Managing Existing Products](#).

### Non-taxable products

If your store is going to sell non-taxable products, you will need to adjust their details in such a way that no taxes will be applied.

For non-taxable products, the tax settings in the 'Product details' need to be adjusted like this:

1. Select Yes from the 'Tax exempt' drop-down box.
2. Select nothing from the 'Apply tax' field.
3. Click the **Save** button to apply the changes.

## 3.5.6 Examples of Configuring Taxes

### *Example 1.*

Suppose, your store is located in Texas, United States, and you need to impose a 8.25% sales tax on all orders delivered within Texas (The sales tax is not charged on deliveries made outside Texas). The tax needs to be calculated based on the discounted subtotal amount of orders before any shipping charges are applied.

To configure this tax, follow these steps:

1. Set up a destination zone for Texas (for example, name this zone "Texas"):

Countries:	United States
States:	United States: Texas
Counties:	--
Cities:	--
Zip/Postal codes:	--
Addresses:	--

2. Go to the 'Taxes' section of your store's administration back-end and add a new tax:
  - a) Call it your state name or whatever you want (for example, "Texas" for the tax service name and "Texas sales tax" for the tax display name).
  - b) Apply it to *DST*.
  - c) Set rates to depend on *Shipping address* (not *Billing*, as you only need to tax orders going to Texas addresses; customers buying products to send out of state as a gift should not be charged sales tax).
  - d) Click on **Save**.
3. Set up the tax rate:
  - a) Set the rate value to 8.25%.
  - b) Apply it to the zone "Texas".
  - c) Set the membership level to *All*.
  - d) Click on **Add**.
4. If you haven't yet done so, adjust 'Taxes options' for your store as needed.
5. Apply the tax to all the products to which it needs to be applied by highlighting the tax name on the 'Product details' page. Make sure that the 'Tax exempt' drop-down box for these products is set to *No*.

Please note that if the cost of shipping for different locations in Texas is not the same, you will have to define several destination zones for Texas (a separate zone for each Texas location with a different shipping rate) and to apply the tax rate of 8.25% to each of these zones. Technically, this means that you will have more than one rates defined for Texas sales tax, and each of these tax rates will have the value of 8.25% and will be applied to a certain destination zone in Texas.

#### *Example 2.*

Suppose, your store sells products to your own state and to two neighboring states. You have two categories of customers, retail and wholesale. Wholesale customers correspond to the membership level "Wholesale", retail customers are just ordinary customers (registered or anonymous) without a membership level. For example, you need to impose a sales tax on products purchased by retail customers and shipped within your own state. Any customers who order products to be shipped out of state

and wholesale customers in-state do not pay sales tax.

In this situation, the sales tax can be set up as follows:

1. Set up a destination zone for your own state (for example, "Zone 1").
2. Add a tax and name it your state's sales tax.
3. Define *two* tax rates for this tax:
  - Set the first tax rate equal to the sales tax amount that needs to be applied to in-state retail purchases. Apply this rate to *Zone 1* and *All* membership levels.
  - Set the second tax rate to 0%. Apply this rate to *Zone 1* and to the *Wholesale* membership level.

This way everyone in Zone 1 except Wholesale users will pay the sales tax. Wholesale users will see a "0%" tax line appear on their checkout page.

Please note that if the cost of shipping for different locations within your state is not the same, you will have to define several destination zones for your state (a separate zone for each location with a different shipping rate) and to apply the sales tax rate to each of these zones.

## 3.6 Payment Settings

This section provides information on the adjustment of payment settings in an X-Cart-based store.

See:

- [Payment Methods](#)
- [Credit Card Types](#)

### 3.6.1 Payment Methods

Before going live with your store, you need to define the ways in which you will accept payments from your customers. X-Cart provides a number of payment methods that you can use. Some of them require manual processing of payments by the store admin, others depend on external online processing services like PayPal, Authorize.Net, 2Checkout, WorldPay, Protx and others.

You will probably not want to use *all* the payment methods supported by X-Cart, so what you will need to do is enable the methods that you will use and disable the ones that you won't. You will also need to configure the methods that you will use.

Your store's payment methods can be managed using the 'Payment methods' section of your store's administration back-end (Administration menu->Payment methods). This section contains two dialog

boxes - 'Payment methods':

**Payment methods**

Language: English

[Check all](#) / [Uncheck all](#)

	METHODS	SPECIAL INSTRUCTIONS	PROTOCOL	MEMBERSHIP	POS.
<input checked="" type="checkbox"/>	<input type="text" value="Credit Card"/> Extra charge: <input type="text" value="0.00"/> \$ <input type="checkbox"/> Cash on delivery method	<input type="text" value="Visa, Mastercard, American Express"/>	<input type="text" value="HTTPS"/>	<input type="text" value="All"/> <input type="text" value="Premium"/> <input type="text" value="Wholesale"/>	<input type="text" value="0"/>
<input checked="" type="checkbox"/>	<input type="text" value="Check"/> Extra charge: <input type="text" value="0.00"/> \$ <input type="checkbox"/> Cash on delivery method	<input type="text" value="Check payment"/>	<input type="text" value="HTTP"/>	<input type="text" value="All"/> <input type="text" value="Premium"/> <input type="text" value="Wholesale"/>	<input type="text" value="0"/>
<input checked="" type="checkbox"/>	<input type="text" value="Gift Certificate"/> Extra charge: <input type="text" value="0.00"/> \$	<input type="text"/>	<input type="text" value="HTTP"/>	<input type="text" value="All"/> <input type="text" value="Premium"/> <input type="text" value="Wholesale"/>	<input type="text" value="15"/>
<input type="checkbox"/>	<input type="checkbox"/> Cash on delivery method	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text" value="Traveler's Check"/> Extra charge: <input type="text" value="0.00"/> \$ <input type="checkbox"/> Cash on delivery method	<input type="text" value="US Funds Only"/>	<input type="text" value="HTTP"/>	<input type="text" value="All"/> <input type="text" value="Premium"/> <input type="text" value="Wholesale"/>	<input type="text" value="110"/>

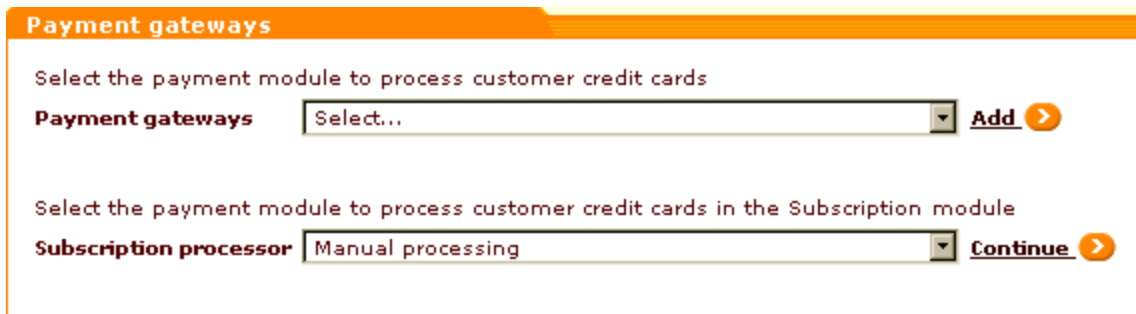
and 'Payment gateways':

**Payment gateways**

Select the payment module to process customer credit cards

Payment gateways

(The latter one may contain an additional drop-down box when Subscriptions module is enabled):



**Payment gateways**

Select the payment module to process customer credit cards

**Payment gateways** Select... **Add** >

Select the payment module to process customer credit cards in the Subscription module

**Subscription processor** Manual processing **Continue** >

The 'Payment methods' dialog box provides controls allowing you to configure, enable and disable payment methods. The 'Payment gateways' dialog box allows you to add payment methods to the list in the 'Payment methods' dialog box.

## Configuring and enabling payment methods

By default, displayed in the 'Payment methods' dialog box are the following methods:

- Credit card,
- Check,
- Gift certificate,
- Phone ordering,
- Fax ordering,
- Money order,
- C.O.D. (cash on delivery),
- Purchase order,
- Personal check,
- Business check,
- Wire transfer,
- Government check,
- Traveler's check.

All of these methods are *methods that require manual processing of payments* (Manual processing is that in which the store admin receives a customer's payment details and processes the payment him- or herself).

If you wish to use one or more of these "manual processing" payment methods, configure and enable them as follows:

1. Select the check boxes to the left of the names of the payment methods that need to be enabled.
2. If you wish, change the method names by editing the respective fields in the METHODS column.

3. If necessary, provide instructions for using the methods (SPECIAL INSTRUCTIONS column). A customer selecting a payment method will see the instructions you provided for that method.
4. Select the type of connection that should be used for each of the payment methods (PROTOCOL column). HTTPS (the secure type of connection) should be selected for all the methods in which you expect transfer of sensitive data over the Internet (For example, HTTPS should be by all means used for the Credit card method to ensure that your customers' credit card information is encrypted before being transmitted across the Web).

**Important:** If you decide to use the HTTPS protocol for any of the payment methods that will be available to your customers, make sure the variable `$https_location` in `config.php` is set up properly.

5. Select the membership level(s) to which each specific payment method should be available (MEMBERSHIP column). Hold down the CTRL key while clicking your mouse on the names of membership levels to select more than one membership level.
6. If you wish the payment methods to be displayed to your customers in a specific order, assign position numbers to them using the fields in the POS. column.
7. If some of the methods require an additional processing charge, adjust the 'Extra charge' fields for them: enter the money amount to be charged and specify whether the amount is expressed in percent or currency units.
8. If some of the shipping methods used by your store presuppose that an order is paid for at the time of delivery, specify, which of the payment methods should be offered as payment options to customers who select such shipping methods. To do so, select the 'Cash on delivery' check boxes for all the payment methods that you wish to be offered as payment options for 'COD' shipping methods. Please specifically note that payment methods marked as 'Cash on delivery' will be used only for shipping methods with COD and will not appear in the list of payment methods available for an order unless the shipping method selected by the customer is marked 'COD'.
9. Click the **Update** button at the bottom of the dialog box to save the changes.

Please note that payment method names and special instructions can be defined in each of the languages used by your store. The language displayed in the Language selector box at the top of the 'Payment methods' dialog box determines the language in which the names and instructions are created. To create payment method names and instructions in a different language, select the desired language from the Language selector, edit the METHODS and SPECIAL INSTRUCTIONS fields and click **Update**.

Besides payment methods that require manual payment processing, X-Cart supports a number of *payment methods providing online payment processing* (methods in which payments are processed automatically by payment systems external to X-Cart). Methods providing online payment processing are initially not on the list of methods displayed by the 'Payment methods' dialog box, but can be added there. After being

added to the list of payment methods, each payment method requiring online processing needs to be configured and enabled.

To add a payment method providing online payment processing to your list of payment methods, you need to scroll down to the 'Payment gateways' dialog box at the bottom of the page and use it to select the payment gateway or system through which the processing will be performed. The names of selectable payment processors are contained in drop-down boxes. There may be one or two drop-down boxes with names of payment processors, depending on whether X-Cart's Subscription module is enabled or disabled. (The drop-down box labeled 'Payment gateways' is displayed at all times, and you should use it to select credit card processors, check processors, direct debit processors or payment systems like PayPal or Nochex. The drop-down box labeled 'Subscription processor' is only displayed when Subscriptions module is enabled, and it should only be used to select processors for subscription payments). After selecting a desired payment processor, you need to click the button that will add the respective payment method to the 'Payment methods' list (**Add** or **Continue**, whichever one is displayed next to the drop-down box from which you performed the selection). The payment method will be added to the bottom of the list in the 'Payment methods' dialog box.

To configure a payment method providing online payment processing, you need to adjust the usual payment method configuration fields provided by the 'Payment methods' dialog box (PROTOCOL, MEMBERSHIP, etc) and to provide the information needed by X-Cart software to use the required payment processing API. The said information can be provided through the configuration page of the respective payment processor. A payment processor's configuration page becomes accessible through the link **Configure** after you add the payment method to the 'Payment methods' list.

Please note that some payment gateways (like Authorize.Net, 2Checkout. Version 2, PayPal, etc) can be set up to work in test or in live mode. Live mode is the mode in which a payment gateway normally works. In live mode, all payment transactions are real, and money actually changes hands. Test mode is provided for the purpose of testing. In test mode, payment gateways work the same way as in live mode, with the exception that no actual payments are made. The mode of operation of a payment processor (test or live) can be selected, where available, on the payment processor's configuration page.

Payment methods providing online processing are enabled in exactly the same way as methods using manual processing: you select the check box to the left of the name of a payment method that needs to be enabled and click the **Update** button at the bottom of the 'Payment methods' dialog box.

Information on configuring the most popular payment methods used with X-Cart is available in the ['Most Popular Payment Methods Supported by X-Cart'](#) section of this manual.

## Disabling payment methods

If you wish, you may temporarily disable use of any of your payment methods by customers. To disable a payment method, unselect the check box next to its name in the 'Payment methods' list and click the **Update** button at the bottom of the list.

### **Deleting payment methods**

Methods providing online payment processing that you once added to the 'Payment methods' list but no longer wish to use can be deleted. To delete a payment gateway from the list of methods, click on the link **Delete** next to its name.

## **3.6.2 Credit Card Types**

If your store is going to accept credit card payments (no matter whether you will use manual or online payment processing), you need to make sure that every type of credit cards that you wish to allow your customers to use at your store is on the list of credit card types supported by your store. The list of credit card types supported by your store is provided in the 'Edit Credit Card Types' section (Administration menu->Credit card types).



### Edit Credit Card Types

[Check all](#) / [Uncheck all](#)

	CARD CODE	CARD TYPE	CVV2*
<input type="checkbox"/>	VISA	Visa	<input checked="" type="checkbox"/>
<input type="checkbox"/>	MC	MasterCard	<input checked="" type="checkbox"/>
<input type="checkbox"/>	AMEX	American Express	<input checked="" type="checkbox"/>
<input type="checkbox"/>	DICL	Diners Club	<input type="checkbox"/>
<input type="checkbox"/>	JCB	JCB	<input type="checkbox"/>
<input type="checkbox"/>	CARTE	Carte Blanche	<input type="checkbox"/>
<input type="checkbox"/>	ABC	Australian BankCard	<input type="checkbox"/>
<input type="checkbox"/>	DINO	Discover/Novus	<input type="checkbox"/>
<input type="checkbox"/>	SW	Switch	<input type="checkbox"/>
<input type="checkbox"/>	SO	Solo	<input type="checkbox"/>
<input type="checkbox"/>	ERT	enRoute	<input type="checkbox"/>

### Add credit card type

CARD CODE	CARD TYPE	CVV2*
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input type="checkbox"/>

\***Note:** Check CVV2 option if this credit card type requires it.

After you install X-Cart, this list already includes the most popular credit card types, so you just need to ensure that everything is in place.

The columns provide the following information about each credit card type:

- CARD CODE - Code of the credit card type.
- CARD TYPE - Name of the credit card type.
- CVV2 - Whether CVV2 is required for the credit card type or not.

If necessary, it is possible to add new credit card types to the list, modify the credit card types in the list or delete selected credit card types from the list.

To add a new credit card type to the list of credit card types supported by your store:

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**.

**Note:** For some credit card types, X-Cart provides a JavaScript-based validation of credit card numbers. This mechanism validates a credit card number entered by a user based on the rules of credit card number formation for specific credit card types. To find out whether such validation is provided for a specific credit card type, see the file `check_cc_number_script.js`. If you add a new credit card type and need such a validation to be provided for it, too, please be aware that some modifications will need to be made to the file `check_cc_number_script.js`.

To rename a credit card type or change its CVV2 property:

1. In the 'Edit Credit Card Types' form find the card type you would like to update.
2. Edit the credit card type details. If necessary:
  - a) Change the credit type name.
  - b) Select/unselect the CVV2 checkbox.
3. Click on **Update**.

To delete a credit card type from the list of credit card types supported by your store:

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 on the page.
3. Click on **Delete selected**.

## 3.7 Modules and Add-ons

### Modules

X-Cart is a highly scalable system. Besides the relatively stable core unit providing basic e-commerce functionality, this system includes a number of components which can be turned on or off depending on the scope of additional functions needed. These controllable components which can be turned on and off directly after X-Cart is installed are traditionally referred to as *modules*. Being part of X-Cart distribution package, modules do not require a separate installation procedure. They get installed along with the basic store and all you need to do to start using them is to make sure they are enabled and, if necessary, to configure their settings.

A full list of installed modules is available in the 'Modules' section of the store's administration back-end (

Administration menu->Modules). Modules that are enabled have checkmarks in the boxes next to them.

### Enabling modules

To enable a module:

1. Find the module name in the list of installed modules in the 'Modules' section.
2. Select the check box next to this name.
3. Click the **Update** button at the bottom of the section to save the changes.

### Configuring modules

Most modules need to be configured before you can use them. You will know a module requires configuration if a Configure link appears next to its name after the module is enabled.

To configure a module:

1. Make sure the module is enabled.
2. Follow the Configure link provided next to the module name in the 'Modules' section  
*or*  
Click General settings in the Administration menu and go to the appropriate subsection of the 'General settings/Modules options' section.
3. Follow the configuration instructions provided in the module's description in this manual (Check out the section [Modules](#)).

### Disabling modules

Modules which you do not need can be disabled so their elements will not appear in the store interface.

To disable a module:

1. Find the module name in the list of installed modules in the 'Modules' section.
2. Unselect the check box next to this name.
3. Click the **Update** button at the bottom of the section to save the changes.

### Add-ons

In addition to the functionality delivered by X-Cart's internal modules, an extensive set of features which can be implemented in an X-Cart-based store is provided in the form of *add-on modules* (or, simply, *add-ons*). These are software components which can be purchased separately, installed in X-Cart root and

linked to the system.

### Installing add-ons

The process of installation is similar for all X-Cart add-ons.

To install an add-on:

1. Download the add-on module distribution package from the 'Software distributives' section of your personal *X-Cart File area* (typically, a .TGZ archive).
2. Uncompress the archive and copy the resulting files to the directory where your X-Cart-based store is installed (X-Cart root).
3. Run the add-on module installation wizard: enter your store URL followed by the module installation script name in your web browser's address line.
4. Follow the installation wizard instructions to complete the installation. After the installation is completed, the name of the installed add-on module should be added to the list in the 'Modules' section of X-Cart's administration back-end (Administration menu->Modules).

Detailed information on installing X-Cart add-on modules is provided in the corresponding add-on reference manuals (Reference manuals for add-on modules are available for downloading from our site: <http://www.x-cart.com/manuals.html>).

### Enabling add-ons

Before you can start using an installed add-on, you need to enable it.

To enable an add-on:

1. Find the name of the add-on in the list of installed modules in the 'Modules' section.
2. Select the check box next to this name.
3. Click the **Update** button at the bottom of the section to save the changes.

### Configuring add-ons

Most add-ons need to be configured before you can use them. You will know an add-on requires configuration if a Configure link appears next to its name after the add-on is enabled.

To configure an add-on:

1. Make sure the add-on is enabled.
2. Follow the Configure link provided next to the add-on's name in the 'Modules' section

*or*

Click General settings in the Administration menu and go to the appropriate subsection of the '

General settings/Modules options' section.

3. Follow the configuration instructions provided in the add-on's reference manual (Reference manuals for add-on modules are available for downloading from our site: <http://www.x-cart.com/manuals.html>).

### **Uninstalling add-ons**

Add-ons which you do not need can be uninstalled.

To uninstall an add-on:

1. Run the add-on's installation wizard: enter your store URL followed by the module installation script name in your web browser's address line.
2. In the installation wizard, select the 'uninstall' option. The script should remove all add-on related data from the store database, as well as the add-on's files from the /skin1 directory.

Please note that the add-on's files in the directory /skin1.original will not be removed. If you wish to remove them, you will have to do it manually.



## 4 Managing the Product Catalog

This section provides information on the management of the product catalog in an X-Cart-based store.

- See [Categories and Subcategories](#) for information on using *custom product categories* (For information on *manufacturer categories*, please refer to the chapter [Manufacturers](#) in the 'Modules' section of this manual).
- Check out [Products](#) to familiarize yourself with the system of managing products.
- Study [Featured Products](#) for details on creating and managing *featured products*.

### 4.1 Categories and Subcategories

#### Categories and Subcategories in X-Cart

Finding products in an e-commerce store is easier when the products are categorized. Categories provide a centralized structure for the product catalog and help customers locate the products they need in mere seconds.

X-Cart allows you to create an unlimited number of custom product categories and populate them with products. Custom product categories are used to categorize products on the basis of any property.

*Examples:*

Custom product categories for a bookstore might be 'Fiction', 'Non-Fiction', 'Audiobooks', etc.

A shop specializing in clothing and accessories might have categories 'Men', 'Women', 'Teens', 'Kids & Baby'.

In X-Cart, products cannot be created outside custom product categories, so you need to have at least one custom product category to be able to add products.

Any category may have subcategories, which, in their turn, may have their own subcategories (The number of subcategories and levels of subcategories is unlimited).

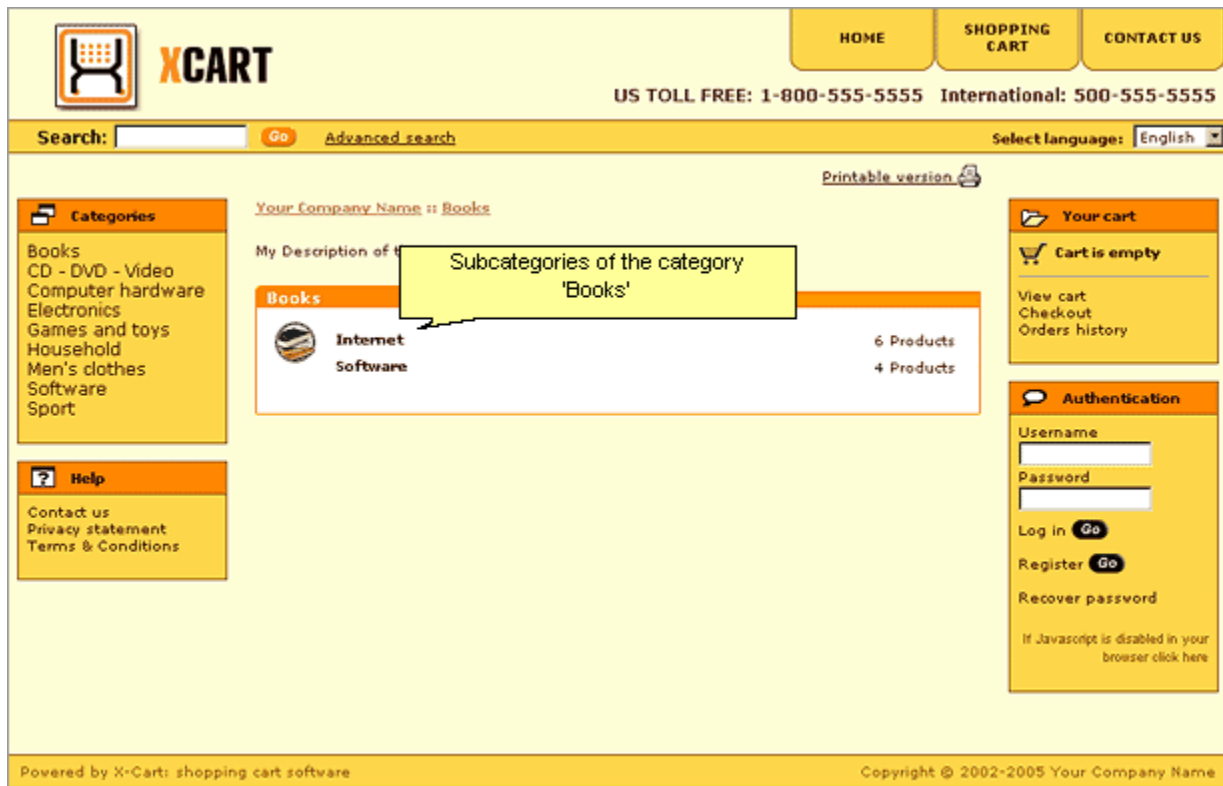
On the Customer area main page, categories of the root level are listed in the Categories menu.

The screenshot shows the X-Cart software interface. At the top, there's a navigation bar with 'HOME', 'SHOPPING CART', and 'CONTACT US' buttons. Below that, a search bar and a language selector (English) are visible. The main content area is divided into three columns. The left column contains a 'Categories' menu with a list of product categories (Books, CD - DVD - Video, Computer hardware, Electronics, Games and toys, Household, Men's clothes, Software, Sport) and a 'Help' section with links for Contact us, Privacy statement, and Terms & Conditions. The middle column displays a welcome message for 'Your Company Name', a demo notice for X-Cart 4.1.0 beta 1, and a 'Featured products' section. The featured product is 'Javascript (Definitive Guide)' with SKU SKU70, priced at \$39.50 (€34.37), a 1% discount from the market price of \$39.90. It includes a 'Buy Now' button and a quantity selector. The right column contains a 'Your cart' section showing 'Cart is empty' and links for View cart, Checkout, and Orders history, and an 'Authentication' section with fields for Username and Password, and buttons for Log in, Register, and Recover password.

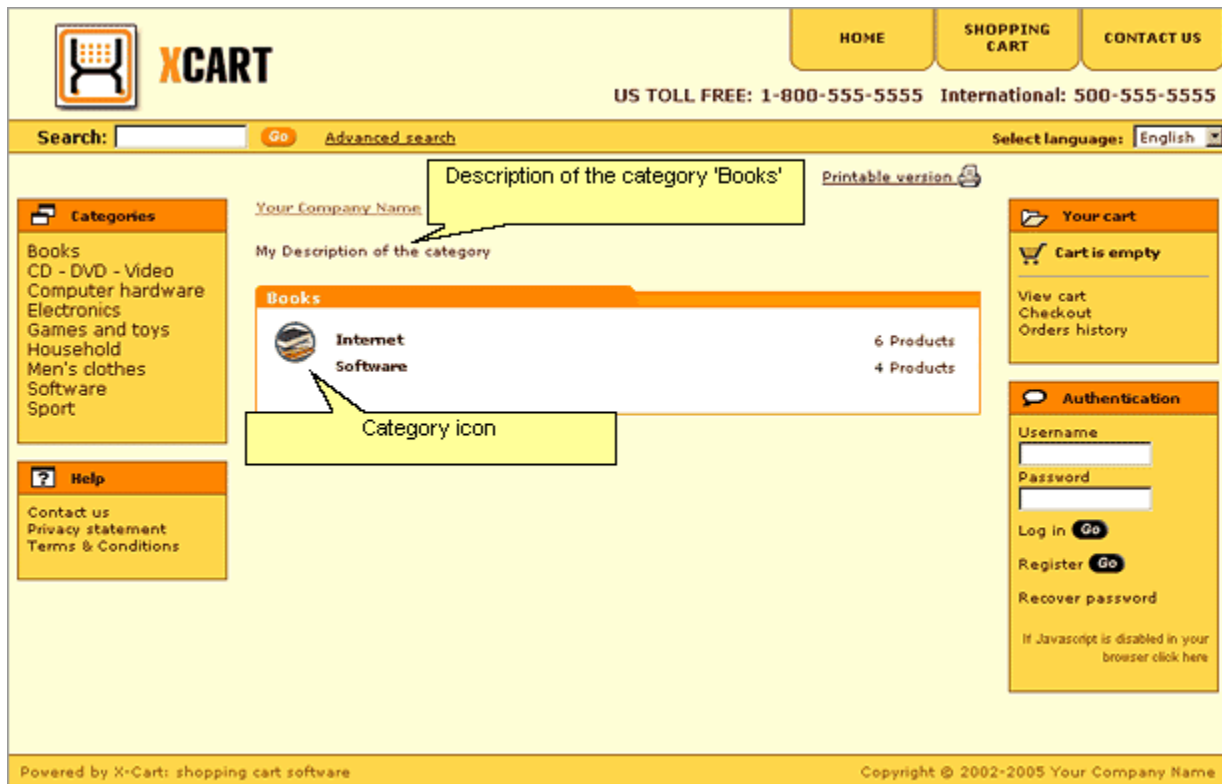
**Note:** The Categories menu is usually displayed in the sidebar. If you want your category tree to be positioned horizontally, check out X-Cart's 'Artistic tunes' skin set (can be purchased separately).

Subcategories and products contained in a root level category outside subcategories become available for viewing in the central area of the site page when a customer clicks on the name of the corresponding root level category in the Categories menu.





Every category/subcategory in a store can have an icon and a short description providing information as to what kind of products is contained there:



Custom product categories can be created and managed through the 'Categories Management' section of the Admin zone (Management menu->Categories).

## Roles in category management

If you are an X-Cart GOLD administrator/provider or an X-Cart PRO administrator:

- You can create custom product categories/subcategories (Study the chapter [Adding Categories](#)).
- You can manage custom product categories/subcategories (See [Managing Existing Categories](#)):
  - [change the order of categories on the storefront](#),
  - [enable/disable categories](#),
  - [view the products contained in a category](#),
  - [modify categories](#),
  - [delete categories](#).

If you are an X-Cart PRO provider:

- You can define, in which category (or categories) each of your products should be located (See the chapter [Adding Products](#) in the [Product Management](#) section of this manual).
- You cannot add, delete, rename, disable/enable categories or change the order in which they appear on the storefront.

## 4.1.1 Adding Categories

### Creating categories

In a new store, before any products can be added, you need to create categories.

To add a new category/subcategory:

1. Go to the 'Categories Management' section of the Admin zone (Management menu->Categories ). You should see a form titled 'Categories'. The first time you enter the 'Categories Management' section, this form will be empty.



The screenshot shows a web interface titled "Categories" with an orange header. Below the header is a table with five columns: POS., CATEGORY NAME, PRODUCTS, SUBCATEGORIES, and ENABLED. The table is currently empty, with the text "No categories" centered below the column headers. Below the table are four buttons: "Update", "Modify selected", "Delete selected", and "Add new...".

On your subsequent visits, after you add some categories, the 'Categories' form will contain a list of existing categories.

Categories				
POS.	CATEGORY NAME	PRODUCTS	SUBCATEGORIES	ENABLED
<input type="text" value="10"/>	<input checked="" type="radio"/> <a href="#">Books</a>	<a href="#">n/a</a>	<a href="#">2</a>	<input type="text" value="Yes"/>
<input type="text" value="20"/>	<input type="radio"/> <a href="#">CD - DVD - Video</a>	<a href="#">n/a</a>	<a href="#">3</a>	<input type="text" value="Yes"/>
<input type="text" value="30"/>	<input type="radio"/> <a href="#">Computer hardware</a>	<a href="#">16</a>	<a href="#">16</a>	<input type="text" value="Yes"/>
<input type="text" value="40"/>	<input type="radio"/> <a href="#">Electronics</a>	<a href="#">10</a>	<a href="#">10</a>	<input type="text" value="Yes"/>
<input type="text" value="50"/>	<input type="radio"/> <a href="#">Games and toys</a>	<a href="#">n/a</a>	<a href="#">4</a>	<input type="text" value="Yes"/>
<input type="text" value="60"/>	<input type="radio"/> <a href="#">Household</a>	<a href="#">n/a</a>	<a href="#">6</a>	<input type="text" value="Yes"/>
<input type="text" value="65"/>	<input type="radio"/> <a href="#">Men's clothes</a>	<a href="#">n/a</a>	<a href="#">2</a>	<input type="text" value="Yes"/>
<input type="text" value="70"/>	<input type="radio"/> <a href="#">Software</a>	<a href="#">2</a>	<a href="#">n/a</a>	<input type="text" value="Yes"/>
<input type="text" value="80"/>	<input type="radio"/> <a href="#">Sport</a>	<a href="#">2</a>	<a href="#">n/a</a>	<input type="text" value="Yes"/>

2. If you want to add a root level category: Click the **Add new** button at the bottom of the 'Categories' form.

If you want to add a subcategory: Go to the category level at which you want the desired subcategory to be created and click the **Add new** button at the bottom of the 'Categories' form.

**Note:** You can freely move between category levels by using category name links and the category level navigation bar: clicking on the name of a category brings you to a lower level in your category tree; clicking on a link in the category level navigation bar brings you to that specific level. See [Navigating the category tree](#) for details.

3. Set the parameters of the new category/subcategory by completing the 'Add category' form (See [Defining category parameters](#)). Be sure to click the **Save** button at the bottom of the 'Add category' form to save the changes.

Basically, this is all: after you click on **Save**, the category details are entered into the store database and the category is considered successfully created. After an automatic page refresh, you should see an information box with a confirmation message.

Now, if you wish, you can add international descriptions for the category (See: [Managing international category descriptions](#)).

## Defining category parameters

Parameters of a new category (including the category location, description, category icon, etc). can be defined using the 'Add category' form.

**Add Category**

Current category: "Root level"

**Category icon:**

**Position:**

**Category:** \*

**Description:**

---

**Membership:**   
To select more than one entry, hold 'Ctrl' key while clicking on them with your mouse. To unselect, hold 'Ctrl' and click on the selected items again.

**Availability:**

**META keywords:**

**META description:**

To define the parameters of a category :

1. (Optional) Select an image that will be used as a *category icon* for the category (Category icons are small images which can be displayed next to category names):
  - a) In the 'Category icon' section of the 'Add category' form, click the **Change** image button (below the default 'No Image Available' image). The 'Image selection' window will appear.
  - b) Specify the location of your image file (use an appropriate **Browse** button if the file is located on the server or on your local computer, or enter an image URL if the file is located on the Internet)

c) Click on **Apply**. The desired image should appear in the 'Add category' form instead of the 'No Image Available' image.

**Note:** X-Cart does not set physical limitations as to the size of category icons which can be used; however, we recommend you keep your category icons relatively small. Recommended category icon image size is from 30x30 px to 50x50 px.

If you do not wish to use an icon for the category being created, leave the default 'No Image Available' image selected in the 'Category icon' section. The default image will not be displayed in the place of the category icon.

Please be aware that, if you do not define an icon for a subcategory, the subcategory will use the icon of its parent category (or of its grandparent category, if an icon for the parent category is not defined).

2. (*Optional*) Use the 'Position' field to specify the category's position in the list of categories. A category's position is defined relative to the positions of the other categories of the same level and branch of the category tree and is expressed by a whole number. Categories with smaller position numbers get placed closer to the top of the list.

**Tip:** Although there is no principal difference whether you set the position numbers of your categories as 1, 2, 3 or 10, 20, 30, the latter method of numeration seems more convenient, as it allows for creation of categories between any two existing ones without having to reassign the position numbers of all the surrounding categories.

If, at this point, you decide to leave the 'Position' field empty, the category will be automatically assigned the position 0 (zero). Please note that, if more than one categories are created on the same level with the same position number, they will be arranged in the order of creation.

3. Use the 'Category' field to provide a name for the category.

**Note:** make sure you do not use the '<' and '>' symbols in the names of categories. Any characters to the right of '<' and the '>' character will not be displayed.

4. (*Optional*) Enter a description for the category into the 'Description' field. To start a new line of text or insert a line break in the description, simply press ENTER.

**Note:** A category description is a short text describing what kind of products is contained in the category. Category descriptions appear on category pages in the Customer zone.

5. Use the 'Membership' box to specify the membership level(s) for which you want the category to be available. By default, All is selected, which means that the category will be visible to all the visitors of your store, including non-members and users who are not logged in. Selecting a specific membership level in the 'Membership' box makes the category available only to the members of this level; non-members and users of other membership levels will not be able to see this category.

6. Set the category's status by selecting *Enabled* or *Disabled* from the 'Availability' box.

*Enabled* means that the category is visible to customers and can be used as a parameter in product search.

*Disabled* means that the category does not appear anywhere in the Customer zone.

**Note:** In X-Cart PRO, the *Disabled* status of a category does not affect the providers' ability to work on its products.

7. (Optional) Use the 'META keywords' and 'META description' fields to provide keywords and a description for the category. Doing so ensures better ranking of the category pages in search engine listings.
8. Click on **Save**.

## Managing international category descriptions

If your store supports more than one languages, you need to provide names and descriptions for your categories in all the languages supported by your store. In X-Cart, a combination of a category's name and description in a language other than default is traditionally referred to as the category's *international description*.

To add an international description for a category:

1. Open the 'International descriptions' form for this category.

*If you are working on a category that has just been created:* After you see an information box with a message confirming successful creation of a category, scroll down to the bottom of the page. Below the 'Modify category' form with the details of the newly created category, you should see a form titled 'International descriptions'.

*If you are working on a category that was created some time in the past:* Open the category for modification, scroll through the 'Modify category' form; below this form you should see a form titled 'International descriptions'.

Language	Category name	Description
<b>Add/Update language</b>		
German	<input type="text"/>	<input type="text"/>
<input type="submit" value="Submit"/>		

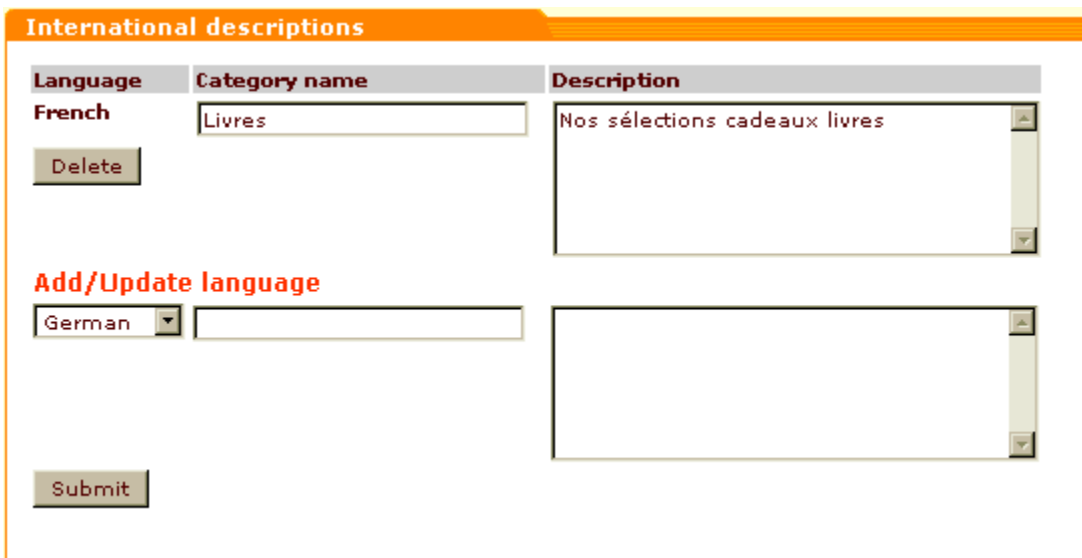
2. Select the desired language from the LANGUAGE selectbox.
3. Use the CATEGORY NAME field to enter a category name in the selected language.
4. Use the DESCRIPTION field to enter a category description in the selected language.



Language	Category name	Description
<b>Add/Update language</b>		
French	Livres	Nos sélections cadeaux livres
<input type="button" value="Submit"/>		

5. Click the **Submit** button at the bottom of the 'International descriptions' form. The international description should be added. After an automatic page refresh, you should see an information box with a confirmation message.

If you scroll down to the 'International descriptions' form, you should see your description added to the list of international descriptions for the category:



Language	Category name	Description
<b>French</b>	Livres	Nos sélections cadeaux livres
<input type="button" value="Delete"/>		
<b>Add/Update language</b>		
German		
<input type="button" value="Submit"/>		

To edit an international category description, change the corresponding category name and/or description and click on **Submit**. The international description should be updated.

To delete an international description, click the **Delete** button below the name of the corresponding language. After an automatic page refresh, you should see an information box with a confirmation message.

If you scroll down to the 'International descriptions' form, you should see that the description has been removed from the list of international descriptions for the category.

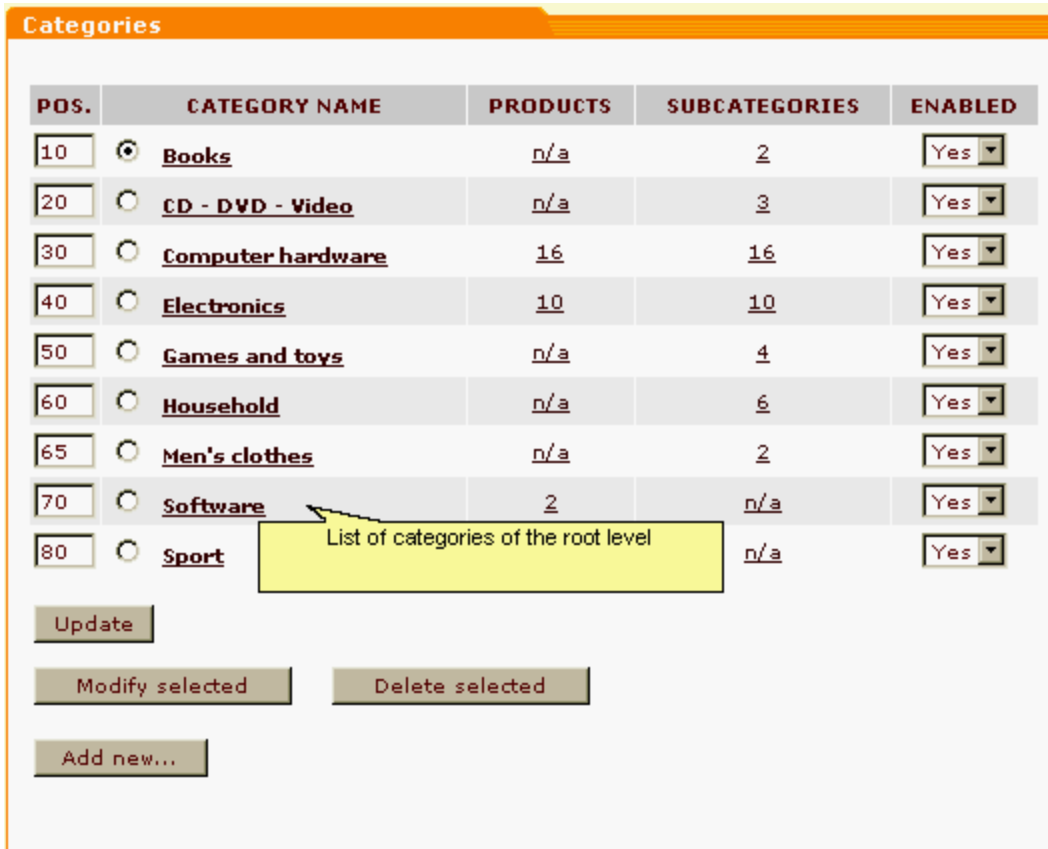


## 4.1.2 Managing Existing Categories

### Navigating the category tree

To perform any operation on a category (for example, to modify or delete a category, or to view the products contained in a category), you first need to locate this category. As categories in your store may be located on more than one levels, you need to be able to navigate the category tree to locate categories.

No navigation is required to locate a category on the root level: a list of all the categories of the root level becomes immediately visible in the 'Categories' form as soon as you enter the 'Categories Management' section of the Admin zone (Management menu->Categories):



POS.	CATEGORY NAME	PRODUCTS	SUBCATEGORIES	ENABLED
10	<input checked="" type="radio"/> <b>Books</b>	<u>n/a</u>	<u>2</u>	Yes ▾
20	<input type="radio"/> <b>CD - DVD - Video</b>	<u>n/a</u>	<u>3</u>	Yes ▾
30	<input type="radio"/> <b>Computer hardware</b>	<u>16</u>	<u>16</u>	Yes ▾
40	<input type="radio"/> <b>Electronics</b>	<u>10</u>	<u>10</u>	Yes ▾
50	<input type="radio"/> <b>Games and toys</b>	<u>n/a</u>	<u>4</u>	Yes ▾
60	<input type="radio"/> <b>Household</b>	<u>n/a</u>	<u>6</u>	Yes ▾
65	<input type="radio"/> <b>Men's clothes</b>	<u>n/a</u>	<u>2</u>	Yes ▾
70	<input type="radio"/> <b>Software</b>	<u>2</u>	<u>n/a</u>	Yes ▾
80	<input type="radio"/> <b>Sport</b>		<u>n/a</u>	Yes ▾

Update

Modify selected      Delete selected

Add new...

The list is sorted alphabetically. The POS. column shows the order in which the categories appear on the storefront. The column PRODUCTS shows the number of products contained in each of the categories (outside subcategories). The column SUBCATEGORIES shows the number of subcategories in each of the categories. The column ENABLED demonstrates the status of the categories (enabled or disabled).

To locate a category on any level other than 'root', you need to navigate to that level of the category tree. If the desired category is a subcategory of a root level category, simply click on the name of the root level category. If the desired category is located several levels apart from the root level, consecutively click on

the names of categories leading to this category until you reach the desired location. In any case, a click on a category name takes you to the level of that category and allows you to view the list of the category's subcategories (if the category has any subcategories). With regard to the category set shown in the screenshot above, a click on the root level category 'Books' will produce the following:

**Categories**

Root level > Books

Name of the category you are viewing

Current category: "Books"

Modify Category    Category products    Delete category

**Subcategories**

POS.	CATEGORY NAME	PRODUCTS	SUBCATEGORIES	ENABLED
<input type="checkbox"/>	<input checked="" type="radio"/> <u>Internet</u>	6	n/a	Yes ▾
<input type="checkbox"/>	<input type="radio"/> <u>Software</u>	4	n/a	Yes ▾

Update    List of subcategories of the category you are viewing

Modify selected    Delete selected

Add new...

The name of the current category will be shown at the top of the 'Categories' form (*Current category: "Books"*). A list of the category's subcategories will be given below.

On any level except 'root', the top left-hand corner of the 'Categories' form will have a category level navigation bar. This bar will not only show the path to your current location, but will also allow you to return to any of the previously visited levels of the category tree with a single click.

**Categories**

[Root level > Books](#)

**Current category: "Books"**

Category level navigation bar  
(Shows your current location and allows you to return to the previous levels of the category tree)

[Delete category](#)

**Subcategories**

POS.	CATEGORY NAME	PRODUCTS	SUBCATEGORIES	ENABLED
<input type="text" value="0"/>	<input checked="" type="radio"/> <b>Internet</b>	6	n/a	<input type="text" value="Yes"/>
<input type="text" value="0"/>	<input type="radio"/> <b>Software</b>	4	n/a	<input type="text" value="Yes"/>

[Update](#)

[Modify selected](#) [Delete selected](#)

[Add new...](#)

## Changing the order in which categories appear on the storefront

To change the order in which your categories appear on the storefront, do the following:

1. Go to the 'Categories Management' section of the Admin zone (Management menu->Categories ). You should see a form titled 'Categories'.
2. In the 'Categories' form, edit the position numbers of the categories that need to be moved (POS. column).
3. Click on **Update**. The order of the categories in the Customer zone should change.

## Disabling/enabling categories

It is possible to temporarily disable categories. A disabled category does not appear in the category tree on the storefront and is removed from the 'Search in category' drop-down box of the 'Search for products' form in the Customer zone.

To disable one or more categories:

1. Go to the 'Categories Management' section of the Admin zone (Management menu->Categories

). You should see a form titled 'Categories'.

2. Use the 'Categories' form to locate the categories which you want to disable.
3. In the ENABLED column, select No for each of these categories.
4. Click on **Update**. The disabled categories should disappear from the storefront.

**Note:** Please be aware that disabling a category does not disable the products in that category. Although your customers will not be able to find products from a disabled category based on the category name, they will still be able to find them using other parameters (like product title) and they will also be able to access the products directly by entering appropriate URLs into the web browser address line.

To disable all the products in a disabled category, you need to do a product search based on the name of that category and use [group product editing](#) to assign the status *Disabled* to every product listed in the search results.

To re-enable previously disabled categories, re-set the value in the ENABLED column to Yes for these categories and click on **Update**. The categories should re-appear on the storefront.

## Viewing the products contained in a category

To view the products contained in a category (outside subcategories):

1. Go to the 'Categories Management' section of the Admin zone (Management menu->Categories ). You should see a form titled 'Categories'.
2. Use the 'Categories' form to locate the category whose products you wish to view.

**Note:** You can freely move between category levels by using category name links and the category level navigation bar: clicking on the name of a category brings you to a lower level in your category tree; clicking on a link in the category level navigation bar brings you to that specific level. See [Navigating the category tree](#) for details.

3. Do one of the following:
  - In the categories list, click on the product number link (PRODUCTS column) opposite the name of the category.

or

  - Click on the name of the category in the categories list; when the category page opens, click the button **Category products** below the title 'Current category: *Name*'.

A form titled 'Products' will be opened.

**Products**

[Root level](#) > [Software](#)

**Current category: "Software"**

---

**Category products**

2 results found  
 Displaying: 1 - 2 results  
[Check all](#) / [Uncheck all](#)

	SKU	PRODUCT	▲ POS.	QUANTITY	PRICE (\$)
<input type="checkbox"/>	SKU83	<b>ViaVoice Pro 7.0 Millennium Edition</b>	0	100	33.99
<input type="checkbox"/>	SKU174	Windows Millennium	0	100	320.00

The operations below are for the first selected item only:

The list of products will be displayed in the 'Category products' section of the 'Products' form. Titles of the products for which the current category is main will be displayed in bold font. Titles of the products for which the current category is additional will use a non-bold font.

For each of the products, you will be able to see an SKU, a position number, a quantity and a price.

The 'Category products' section allows you to manage the category products very much like the 'Search results' form in the 'Products Management' section: you can delete, preview, modify and clone products, as well as update the products' quantities and prices and generate HTML links.

In addition to that, you can change the order in which the products appear within the category and add new products.

To change the order of products in the category, edit the position numbers of the products that need to be moved (POS. column), then click on **Update**.

To add a new product, click on the **Add new...** button at the bottom of the 'Products' form.

## Modifying categories

If you want to rename a category, to move it to a different location, to change its icon, membership availability or any other parameter(s), do the following:

1. Go to the 'Categories Management' section of the Admin zone (Management menu->Categories ). You should see a form titled 'Categories'.
2. Use the 'Categories' form to locate the category you wish to modify.

**Note:** You can freely move between category levels by using category name links and the category level navigation bar: clicking on the name of a category brings you to a lower level in your category tree; clicking on a link in the category level navigation bar brings you to that specific level. See [Navigating the category tree](#) for details.

3. Do one of the following:
  - Select a radio button next to the name of the category in the categories list and click the **Modify selected** button at the bottom of the 'Categories' form.

or


  - Click on the name of the category in the categories list; when the category page opens, click the button **Modify category** below the title 'Current category: *Name*'.

A form titled 'Modify category' will be opened.

### Modify Category

[Root level](#) > [Books](#)

**Current category: "Books"**

**Category icon:** 

**Position:**

**Category:** \*

**Description:**

---

**Availability:**

**META keywords:**

**META descriptor:**

---

**Category location**

**Current category location:**

Below the 'Modify category' form there will also be a form with international descriptions of the category.

4. Use the 'Modify category' form to readjust the parameters of the category.

After editing any fields, be sure to click on **Save** to save the changes.

To move the category to another location, scroll down to the 'Category location' section of the 'Modify category' form, select the desired location from the 'Current category location' drop-down box and click the Update button.

If you have moved the category, its location in the list of categories should change.

5. If necessary, add, edit or delete international descriptions for the category.

## Deleting categories

If you want to completely remove a category (including all its subcategories and products), do the following:

1. Go to the 'Categories Management' section of the Admin zone (Management menu->Categories ). You should see a form titled 'Categories'.
2. Use the 'Categories' form to locate the category you wish to delete.

**Note:** You can freely move between category levels by using category name links and the category level navigation bar: clicking on the name of a category brings you to a lower level in your category tree; clicking on a link in the category level navigation bar brings you to that specific level. See [Navigating the category tree](#) for details.

3. Do one of the following:

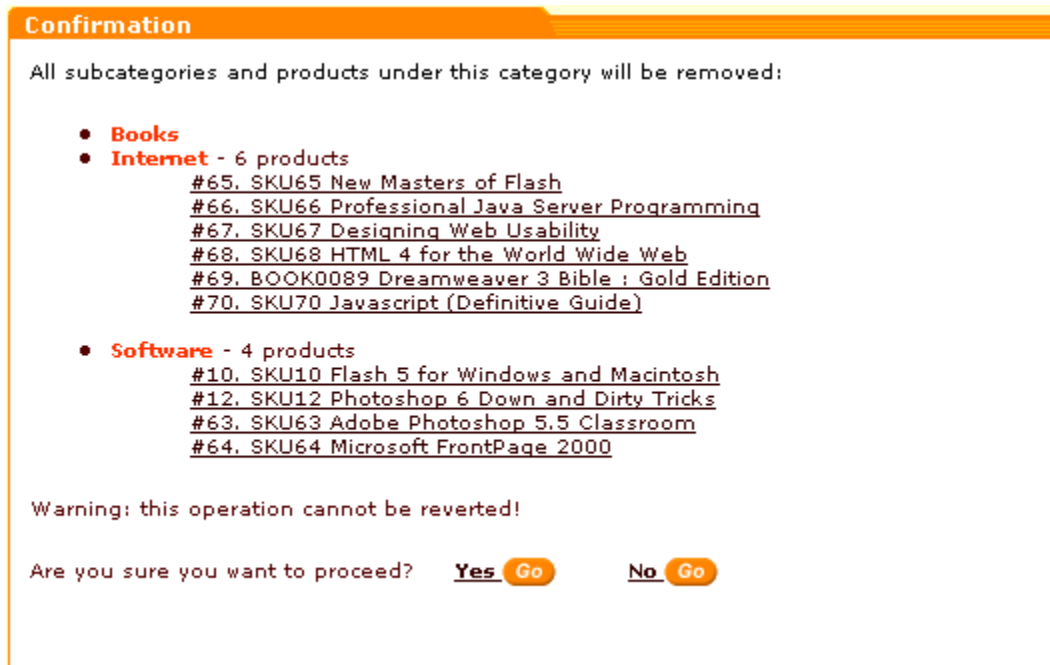
- Select a radio button next to the name of the category in the categories list and click the **Delete selected** button at the bottom of the 'Categories' form.

or

- Click on the name of the category in the categories list; when the category page opens, click the button **Delete category** below the title 'Current category: *Name*'.

A confirmation box will appear. The confirmation box will provide a list of all the categories, subcategories and products that will be removed if you choose to proceed with the deletion.





4. Click **Yes** to confirm your desire to delete the category. The category and all the subcategories and products contained in it will be removed. Please be aware that this operation cannot be reverted. (To cancel the operation, click **No**).

If you have chosen to delete the category, after an automatic page refresh, you should see an information box with a confirmation message.

## 4.2 Products

### Products in X-Cart

Choosing X-Cart as a platform for an online business most certainly suggests that you wish to sell products online. X-Cart provides all the necessary tools for publishing product information on the Web and keeping it accurate and up to date.

The following information can be made available to customers respective to a product:

- product name,
- two types of product descriptions,
- one or more product images,
- SKU,
- price,
- 'list' price,

- weight,
- number of product items available in stock.

Your customers will be able to access this information by browsing through the product catalog or by viewing the results returned by a product search.

The said information can be displayed on two types of pages: 'Products list' pages and 'Product details' pages.

'Products list' pages (any pages listing products contained in categories, featured products lists, search results) provide concise information about products:

The screenshot shows the X-Cart software interface. At the top, there is a navigation bar with 'HOME', 'SHOPPING CART', and 'CONTACT US' buttons. Below this is a search bar and a language selector set to 'English'. The main content area is titled 'Your Company Name :: Games and toys :: Board games'. It features a sidebar on the left with a 'Categories' menu and a 'Help' section. The main product list shows two items: 'Cranium' and 'Lord of the Rings Board Game'. Each item has a thumbnail image, a 'See details' link, a short description, market price, and the current price with a 25% discount. A 'Buy Now' button is present for each item. On the right side, there is a 'Your cart' section showing 'Cart is empty' and an 'Authentication' section showing 'customer is logged in !' with a 'Log out' button.

'Product details' pages provide a more detailed description (The 'Product details' page of any product can be accessed by clicking the 'See details' link below the thumbnail image of the product on a 'Products list' page):

The screenshot displays the X-Cart storefront for a product named 'Cranium #92'. The page layout includes a top navigation bar with 'HOME', 'SHOPPING CART', and 'CONTACT US' buttons. Below this is a search bar and a language selector set to 'English'. The main content area features a product image of the board game, a detailed description, and pricing information. A 'SAVE 25%' badge is visible. The product details section shows 'Quantity' (100 item(s) available), 'Weight' (1.00 lbs), and 'Price' (\$34.99, with a crossed-out price of \$46.34). An 'Add to cart' button is present. The right sidebar contains 'Your cart' (empty) and 'Authentication' (customer logged in). The bottom section has a 'Send to friend' form with fields for 'Your name', 'Your e-mail', and 'Recipient's e-mail'. Annotations with arrows point to various elements: 'Product name' (Cranium #92), 'SKU' (Cranium #92), 'Detailed description' (The outrageous new board game...), 'Product image' (the board game image), 'Quantity of product items in stock' (100 item(s) available), 'Weight' (1.00 lbs), and 'Price' (\$34.99).

In addition to the information shown to customers, you can also supply information that won't be visible on the storefront, but will affect customers' ability to order a product:

- product's availability (whether the product can be ordered or not),
- product keywords (words which can be used to find the product),
- membership (group(s) of users who can see/order the product),
- minimum quantity of product items a customer is allowed to order,
- taxes (whether any taxes should be applied to the product and - if so - what taxes),
- shipping freight (handling charge), etc.

## Roles in product management

If you are an X-Cart GOLD administrator/provider or an X-Cart PRO administrator:

- You can create products (Study the [Adding Products](#) section).
- You can control all the products in the store (See [Managing Existing Products](#)):
  - [find](#) products by certain parameters,
  - [update the quantity and price](#) of specific products,
  - quickly [preview the details](#) of any product,
  - [modify](#) products (including modification in [group product editing mode](#)),

- [create products by cloning](#),
- [create HTML links](#) to products for use on external pages,
- [delete](#) products from the database.

If you are an X-Cart PRO provider:

- You can create products (Study the [Adding Products](#) section).
- You can control all the products you created (Check out [Managing Existing Products](#)):
  - [find](#) products by certain parameters,
  - [update the quantity and price](#) of specific products,
  - quickly [preview the details](#) of any product,
  - [modify](#) products (including modification in [group product editing mode](#)),
  - [create products by cloning](#),
  - [create HTML links](#) to products for use on external pages,
  - [delete](#) products which you no longer need.
- You cannot control products created by any other providers.

## 4.2.1 Adding Products

As soon as some categories have been created, you can begin adding products. In X-Cart, three methods of adding products are supported:

- [manual creation](#) (New products are created one by one by manually entering product information into the forms of the 'Products Management->Add product' section of the store back-end),
- [cloning](#) (New products are created by making copies of already existing products),
- [import](#) from a spreadsheet (Specially formatted product information is imported into the database using X-Cart's import/export functionality).

### Creating products (manually)

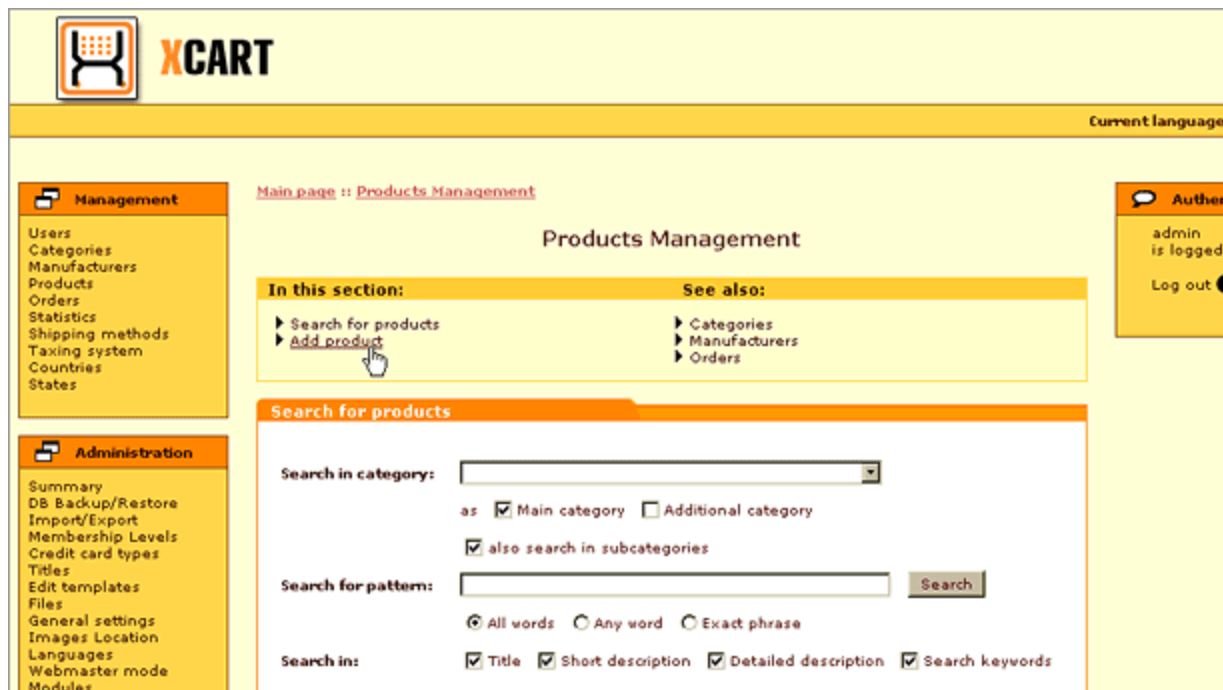
As it has already been mentioned in the chapter [Categories and Subcategories](#), products in X-Cart-based stores are created within categories. Basically, having at least one category in your store is the only prerequisite for creating products. However, you should be aware that information associated with a product may include such details as *manufacturer* (name of the individual or company that produced the product - can be used for assigning the product to a manufacturer category), *membership* (information about the product's availability to different categories of customers) and *taxes* (types of taxes that need to be applied to the product). If you wish to be able to set up manufacturer/membership/taxes for each of your products at the time of creation, you need to configure the necessary manufacturers/membership levels/taxes before you begin working on product details.

To create a product:

1. Go to the 'Products Management->Add product' section of your store.

*If you are an X-Cart GOLD administrator/provider or an X-Cart PRO administrator:*

- a) Go to the 'Products Management' section (Management menu->Products).
- b) Click the link Add product in the 'Products Management' section menu.



*If you are an X-Cart PRO provider:*

Click the link Add new product in the Products menu.

In the 'Products Management->Add product' section, you should see a dialog box titled 'Product details'.

2. Define the details of the new product by completing the fields of the 'Product details' dialog box (See: [Defining product details](#)). Be sure to click the **Save** button at the bottom of the 'Product details' dialog box to save the changes.

**Tip:** If the set of fields provided by the 'Product details' dialog box does not exactly meet the needs of your business, consider using X-Cart's module [Extra Fields](#) to create custom fields for it. If you are going to sell downloadable products, enable X-Cart's [Egoods](#) module.

Basically, this is all: after you click on **Save**, the product details are entered into the store database and the product is considered successfully created. After an automatic page refresh, you should see an information box with a confirmation message.

Now, if you wish, you can define international descriptions and other additional features for the product

(See: [Defining additional product features](#)).

## Defining product details

The 'Product details' dialog box provides four sections: 'Product thumbnail', 'Product owner', 'Classification' and 'Details'. The instructions below explain how to complete each of these sections. After you provide all the necessary product details in all the sections, be sure to click the **Save** button at the bottom of the 'Product details' dialog box to save the changes.

### Product thumbnail

This section allows you to select two images which will represent the product on the storefront: a *thumbnail image* and a *product image*. A thumbnail image is an image displayed next to the product title and short description in the Products list. A product image is an image displayed next to the product title and detailed description on the 'Product details' page.



To select an image that will be used as the product's *thumbnail image*:

1. In the 'Thumbnail' section of the 'Product details' dialog box, click the **Change image** button (below the default 'No Image Available' image). A window titled 'Image selection' will appear.
2. Specify the location of the image file you are planning to use as the product's thumbnail (use an appropriate **Browse** button if the file is located on the server or on your local computer, or enter an image URL if the file is located on the Internet). X-Cart does not set physical limitations as to the size of product thumbnails which can be used; however, we recommend you keep your thumbnails relatively small. Recommended thumbnail image size is from 50x50 px to 150x150 px.

3. Click on **Apply**. The desired image should appear in the 'Product details' dialog box instead of the 'No Image Available' image.

If you do not select a thumbnail image for the product being created, the default 'No Image Available' image will be displayed in the place of the product's thumbnail.

**Note:** Default 'No Image Available' images can be defined via Administration menu->Images Location.

To select an image that will be used as the product's *product image*:

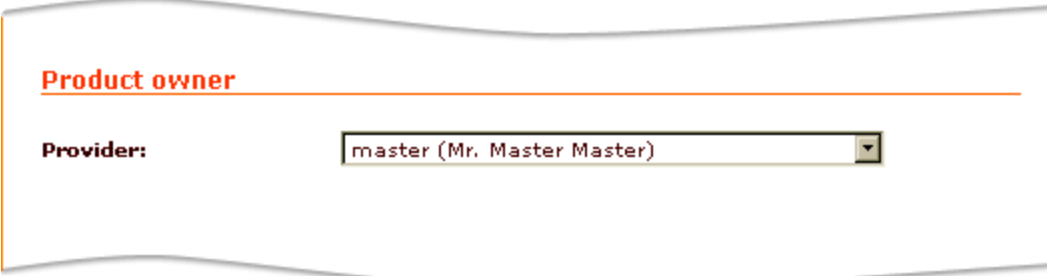
1. In the 'Product image' section of the 'Product details' dialog box, click the **Change image** button (below the default 'No Image Available' image). A window titled 'Image selection' will appear.
2. Specify the location of the image file you are planning to use as the product's product image (use an appropriate **Browse** button if the file is located on the server or on your local computer, or enter an image URL if the file is located on the Internet). X-Cart does not set physical limitations as to the size of product images which can be used; however, please be aware that if your product images are considerably wide, you may want to redesign the page layout for 'Product details' pages.
3. Click on **Apply**. The desired image should appear in the 'Product details' dialog box instead of the 'No Image Available' image.

If you do not select a product image for the product being created, the thumbnail image defined for the product will be displayed in the place of the product's product image.

**Note:** Default 'No Image Available' images can be defined via Administration menu->Images Location.

### Product owner

This section of the 'Product details' dialog box is supposed to contain information about the product owner (the provider who created the product, or the provider on whose behalf the store admin created the product).



**Product owner**

**Provider:**

The contents of this section is defined automatically in X-Cart GOLD and in the Provider zone of X-Cart PRO. An X-Cart PRO administrator is supposed to specify the product owner manually by selecting a provider's name from the 'Provider' drop-down box.

## Classification

This section allows you to define a category (or several categories) in which the product should be located and to set the product's availability status.

**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

To define the product's location:

1. Specify the product's main category by selecting a category from the 'Main category' field.
2. (*Optional*) If, in addition to the main category, you need the product to be displayed in some other category or categories, specify these categories by selecting them from the 'Additional categories' list (To select a single category, click on its name with your mouse; to select multiple categories, mouse-click on their names holding down the CTRL key).

**Note:** If you do not see a desired product category in the category fields of the 'Product details' dialog box, it means that it has not been defined by the store administrator.

To set the product's availability status, select *Available for sale*, *Hidden but available* or *Disabled* from the 'Availability' box.

- *Available for sale* means that customers will be able to find the product by browsing the catalog or by using product search.
- *Hidden, but available for sale* means that the product will not be included into the product catalog. No person will be able to find it unless he or she knows an exact URL address of the product details page of this product.

This feature allows you to limit access of customers to certain products without having to set up membership levels. After you finish defining the details of a 'hidden' product and click the **Save** button, the URL address of the product's Product details page will appear below the 'Availability' box. You can use this URL to give your privileged customers direct access to the product.



- *Disabled* means that the product will not be displayed to customers (This status may be useful if, for some reason, you do not want to sell the product for a while).

## Details

This section allows you to provide essential product details. As this section is pretty big, we'll divide it into several portions for convenience.

Portion 1:

**Details**

**SKU:**

**Product name:**

**Search keywords:**

**Short description\* :**

**Detailed description\* :**

\* **Note:** If HTML-tags in the product description text will be detected this text will be stored in the database as is, otherwise - as plain text with all the new line breaks replaced with <br> tags.

The fields of this portion allow you to set the following details:

1. 'SKU' (Stock Keeping Unit) - a unique identification code for your product. For your convenience, X-Cart generates a unique SKU for each new product you add, so it is quite safe to leave the value of the 'SKU' field as is. However, if you wish to use your own system of product identification, simply remove the value generated by X-Cart and type in your own identification code for this product). SKU must not be longer than 32 characters.

**Note:** (For users of X-Cart PRO) Since X-Cart version 4.1.0, a product SKU must be unique per provider, which means that no two products within the product set of one provider may have the same SKU, while nothing is wrong when the same product SKU is used by two different providers.

2. 'Product name' - a title by which you and your customers will be able to identify the product.

**Note:** make sure you do not use the '<' and '>' symbols in the text fields in this form. Any characters to the right of '<' and the '>' character will not be displayed.

3. 'Search keywords' - words or phrases not contained in the product's title or descriptions by which you and your customers will be able to find the product.
4. 'Short description' - a short description of the product (will be visible to customers when they view the product in the 'Products list').
5. 'Detailed description' - a detailed description of the product (will be visible to customers when they view the product's 'Product details' page - accessible by clicking the 'See details' link below the thumbnail image of the product).

**Note:** 'Short description' and 'Detailed description' fields support HTML formatting.

Portion 2:



<b>Price (\$)</b>	<input type="text" value="0"/>
<b>List price (\$)</b>	<input type="text" value="0"/>

The fields of this portion allow you to set the following details:

1. 'Price' - a price that will be used as the basic price for this product. The price should be specified in the store's primary currency.

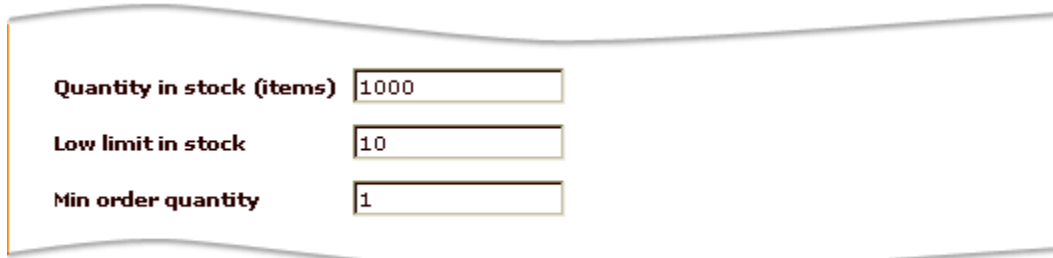
**Note:** The primary currency may be defined by the store administrator via the 'Primary currency symbol' field in General Settings->General options->General parameters.

2. 'List price' - a price that will be used as the product's list price. List price is a promotion price which may be displayed on the storefront next to the actual price of the product. List price represents an average price of the product on the market, and the difference between the two prices is supposed to convince a prospective customer that ordering the product from your store is more economical.

If the price specified in the 'List price' field is higher than the basic price of the product, a note: 'Market price: X' will be displayed next to the real price of the product on the storefront. There will also be a note showing how many percent less a customer will have to pay if he or she buys the product at your store, for example 'Our price: Y, save 10%'.

If you do not want to use list prices, simply leave the value of the 'List price' field set to 0.00.

Portion 3:



<b>Quantity in stock (items)</b>	<input type="text" value="1000"/>
<b>Low limit in stock</b>	<input type="text" value="10"/>
<b>Min order quantity</b>	<input type="text" value="1"/>

The fields of this portion allow you to set the following details:

1. 'Quantity in stock (items)' - a number of product items available for sale . As your customers order the product, X-Cart's inventory tracking system will track the number of product items remaining in stock and automatically update the value in this field. This system will ensure that your customers will not be able to order more product items than you have.

**Note:** As soon as the last item of a product is purchased (in fact, as soon as the order is placed with the status 'Queued'), the product's quantity in stock becomes 0 (zero), and from that moment on the product is not available for ordering. The product is marked 'Out of stock' and remains on the storefront, unless the store admin chooses to hide out-of-stock products from customers (Descriptions of out-of-stock products can be removed from the storefront by enabling the option 'Disable products which are out of stock' in the General settings->General options->Inventory options section of the Admin interface).

2. 'Low limit in stock' - a number of product items remaining in stock that should be regarded as insufficient. As soon as the product's quantity in stock reaches this limit, X-Cart's inventory tracking system will start sending email notifications to the store orders department signalling that your stock needs to be replenished. A notification will be sent every time someone orders the product.
3. 'Min order quantity' - a minimum number of items of the product that a customer will be allowed to order at a time. The value specified in this field will be entered as the smallest value in the quantity selectbox of the product on the storefront; a note 'you must order at least N items' will be added below the product description.

Portion 4:

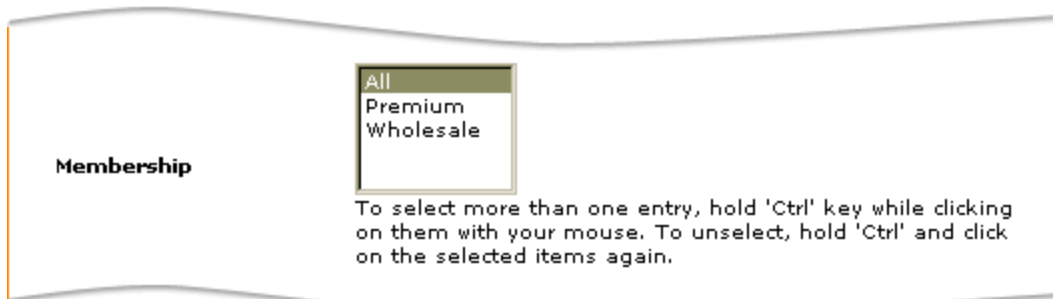


<b>Weight (lbs)</b>	<input type="text" value="0"/>
---------------------	--------------------------------

The 'Weight' field in is portion allows you to specify the weight of one product item. The weight should be specified in the units of weight supported by the store.

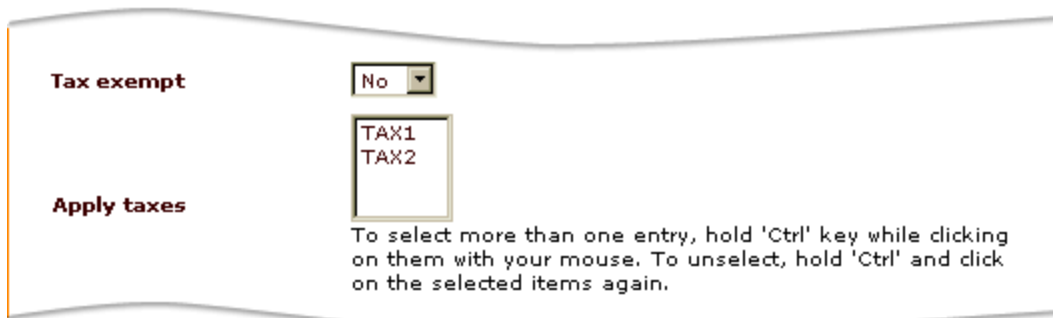
**Note:** The units of weight may be defined by the store administrator via the 'Weight symbol' field in General Settings->General options->General parameters.

Portion 5:



This portion allows you to limit access to the product based on membership levels. If you want the product to be available to all visitors including non-members and users who are not logged in, select All from the 'Membership' selectbox. If you want the product to be available only to members of specific levels, select these levels from the 'Membership' selectbox, making sure the choice All is unselected (To select a single membership level, simply click on its name with your mouse; to select multiple levels, click on their names holding down the CTRL key).

Portion 6:

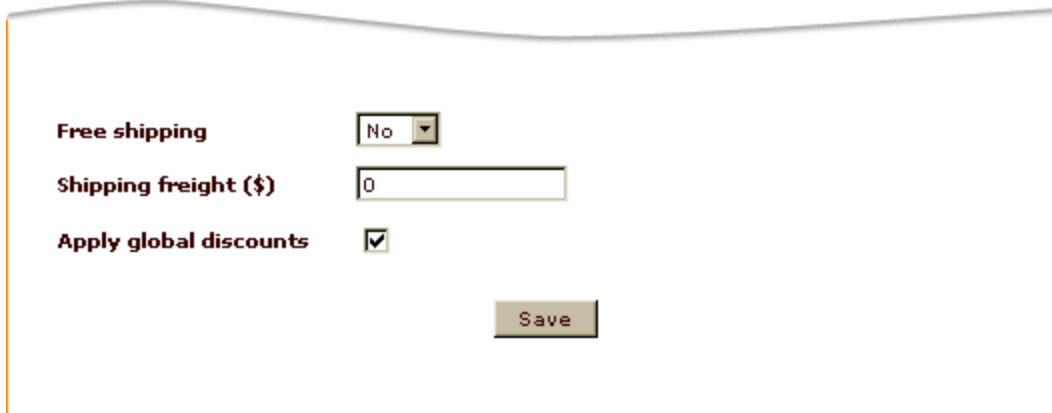


This portion allow you to provide the following details:

1. The 'Tax exempt' field allows you to specify whether any taxes should be applied to the product or not. (Select Yes if you want this product to be tax exempt).
2. The 'Apply taxes' field allows you to specify which taxes should be applied to the product (To select multiple taxes, press and hold down the CTRL key while clicking your mouse).

**Note:** The field 'Apply taxes' is visible in the 'Product details' dialog box only if taxes have been defined by the store admin.

Portion 7:



The screenshot shows a form with three input fields and a 'Save' button. The first field is 'Free shipping' with a dropdown menu set to 'No'. The second field is 'Shipping freight (\$)' with a text input containing '0'. The third field is 'Apply global discounts' with a checked checkbox. The 'Save' button is located below the checkboxes.

This portion allows you to provide the following details:

1. The 'Free shipping' field allows you to specify whether shipping for this product should be free or not. (Select *No* if you want to charge purchasers of this product for shipping).
2. The 'Shipping freight' field allows you to specify a sum of money that a purchaser of the product will be supposed to pay for any expenses incurred by the store in connection with having the product insured/package/delivered to a location where it will be picked up by a shipping service/loaded/etc. When defined, shipping freight is included in the product's shipping cost, so the customers do not see it as a separate sum.

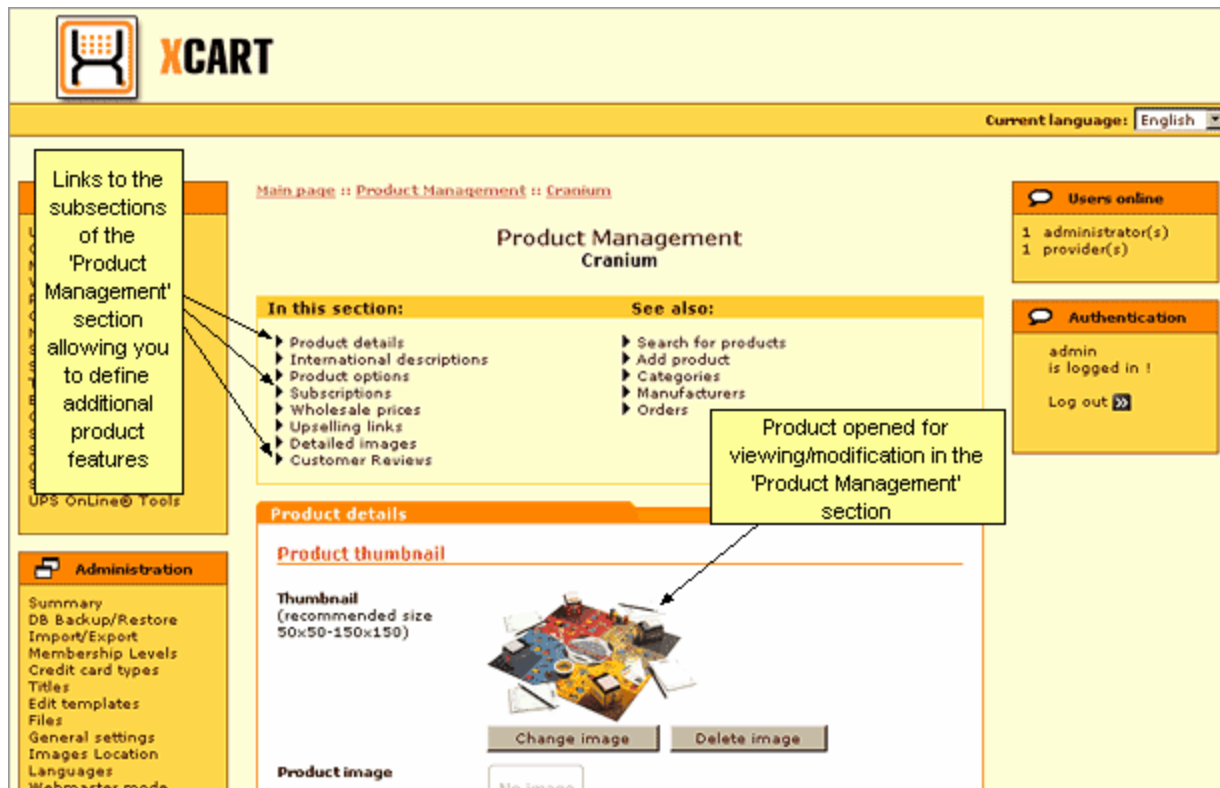
**Note:** The field 'Shipping freight' is ignored (shipping freight is not charged) if the option 'Free shipping' is set to Yes.

3. The 'Apply global discounts' check box allows you to specify whether global discounts should be applied to the product or not (Select the check box to apply discounts).

## Defining additional product features

Besides the parameters defined in the fields of the 'Product details' dialog box, any product in your store can have some additional features (for example, descriptions in one or more foreign languages, detailed images, product options/variants, wholesale prices, etc). Of the mentioned features, only multilanguage product descriptions can be set up in a basic X-Cart installation: all the other features are enabled by X-Cart's modules or add-ons providing respective functionality. This means that before you can set up any additional product features other than descriptions in foreign languages, you need to enable and configure the modules or add-ons which make these features possible.

The dialog boxes allowing you to set up additional features for some product are accessible via the links in the 'Product Management' section menu when this product is opened for viewing/modification.



**Note:** The set of links available in the 'Product Management' section menu is defined by the set of modules that are enabled.

Depending on the status of the option 'Display all dialogs for product editing on one page' in General settings->General options, these dialog boxes are displayed either on separate pages (by default) or on the same page with the 'Product details' dialog box.

### Managing international product descriptions

If your store supports more than one languages, you need to provide names and descriptions for your products in all the languages supported by your store. A combination of a name, a set of search keywords, a short and a detailed description for any product in any language other than default is traditionally referred to as the product's *international description*.

You can create as many international product descriptions as you like.

To add an international description for a product:

1. Open the dialog box in which you can create an international description for this product ( 'International descriptions' dialog box):
  - a) (*If necessary*) Find the product for which the international description is intended. Open this product for modification in the 'Product Management' section.
  - b) Click the International descriptions link in the 'Product Management' section menu.

The screenshot shows the XCart administration interface. At the top left is the XCart logo. The top right shows the current language is set to English. The main content area is titled 'Product Management Cranium'. On the left, there are two vertical navigation menus: 'Management' (Users, Categories, Manufacturers, Products, Orders, Statistics, Shipping methods, Taxing system, Countries, States) and 'Administration' (Summary, DB Backup/Restore, Import/Export, Membership Levels, Credit card types, Titles, Edit templates, Files, General settings, Images Location, Languages, Webmaster mode, Modules, Payment methods, Patch/Upgrade, HTML catalog, Static pages, Speed Bar). On the right, an 'Authentication' box shows 'admin is logged in!' and a 'Log out' button with a 'Go' icon. The main content area has a breadcrumb trail: 'Main page :: Product Management :: Cranium'. Below this, there are two columns: 'In this section:' with links for 'Product details' and 'International descriptions' (the latter is underlined and has a mouse cursor over it), and 'See also:' with links for 'Search for products', 'Add product', 'Categories', 'Manufacturers', and 'Orders'. Below these is a 'Product details' section with a 'Product thumbnail' heading. It shows a thumbnail image of a crane and two buttons: 'Change image' and 'Delete image'. Below that, there is a 'Product image' section with a 'No image Available' placeholder and a 'Change image' button.

You should see a dialog box titled 'International descriptions'.

The screenshot shows a dialog box titled "International descriptions". At the top right, there is a "Language:" dropdown menu. Below this, there are four input fields: "Title:", "Search keywords:", "Short description:", and "Detailed description:". The "Short description" and "Detailed description" fields are larger and have vertical scrollbars. At the bottom of the dialog, there are two buttons: "Apply" and "Delete".

2. Use the 'Language' drop-down box at the top of the 'International descriptions' dialog box to select the language you want to use for the description. The buttons Apply and Delete at the bottom of the 'International descriptions' dialog box should become active.
3. Use the 'Title' field to provide a name for the product in the selected language.
4. Enter product keywords in the selected language into the 'Search keywords' field.
5. Provide a short and a detailed description for the product in the selected language ('Short description' and 'Detailed description' fields).
6. Click the **Apply** button at the bottom of the 'International descriptions' dialog box. The international description should be added. You should see an information box with a confirmation message.

To edit an international product description:

1. Open the 'International descriptions' dialog box with the product's international descriptions.
2. Use the 'Language' drop-down box at the top of the 'International descriptions' dialog box to select the language of the international description you wish to edit. This should open the description in the '



International descriptions' dialog box.

3. Edit the product title/keywords/descriptions.
4. Click the **Apply** button at the bottom of the 'International descriptions' dialog box. The international description should be updated. You should see an information box with a confirmation message.

To delete an international product description:

1. Open the 'International descriptions' dialog box with the product's international descriptions.
2. Use the 'Language' drop-down box at the top of the 'International descriptions' dialog box to select the language of the international description you wish to delete. This should open the description in the 'International descriptions' dialog box.
3. Click the **Delete** button at the bottom of the 'International descriptions' dialog box. The international description should be deleted. You should see an information box with a confirmation message.

### Managing other product features

For detailed information on setting up any other additional product features, refer to the descriptions of the respective modules:

- Product Options (and Product Variants) - [Product Options](#) module;
- Subscriptions - [Subscriptions](#) module;
- Wholesale Prices - [Wholesale Trading](#) module;
- Upselling Links - [Upselling Products](#) module;
- Detailed Images - [Detailed Product Images](#) module;
- Customer Reviews - [Customer Reviews](#) module.

## 4.2.2 Managing Existing Products

### Finding products

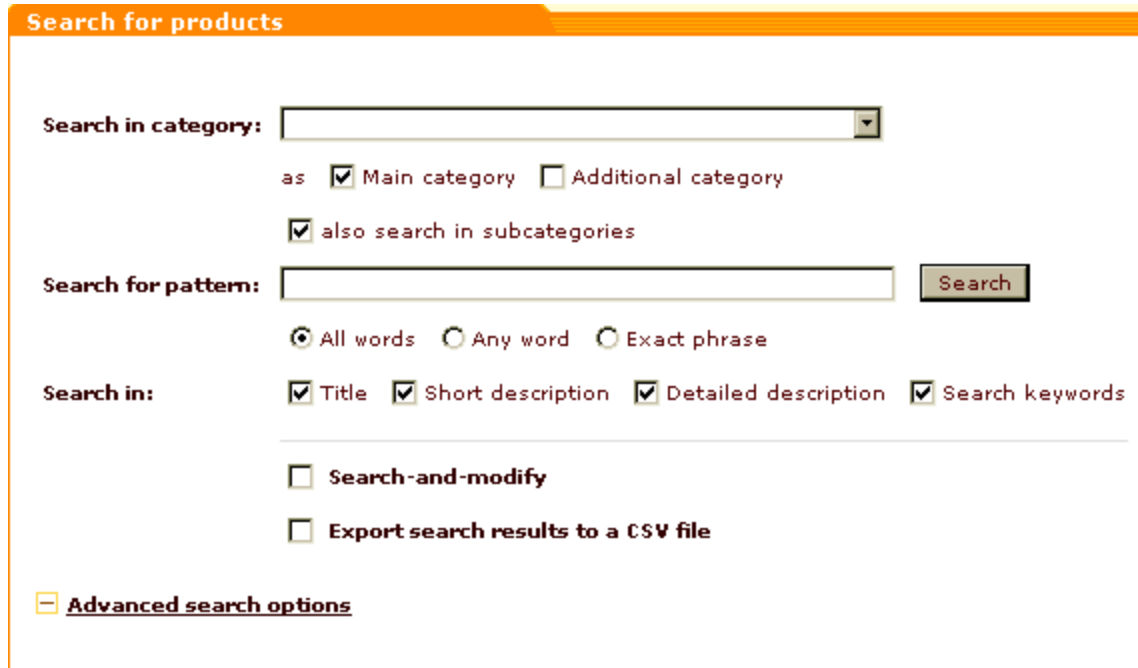
X-Cart allows you to find products by specifying various product parameters.

To find a product or several products:

1. Open the 'Search for products' form in the 'Products Management' section of your store.  
*If you are an X-Cart PRO administrator:* click on Products in the Management menu.  
*If you are an X-Cart GOLD administrator/provider or an X-Cart PRO provider:* click on Search for products in the Products menu.

2. Use the 'Search for products' form to provide criteria for your search.

You can use basic search:



The screenshot shows a search form titled "Search for products" with an orange header. The form contains the following elements:

- Search in category:** A dropdown menu.
- as:** Two checkboxes:  Main category and  Additional category.
- also search in subcategories
- Search for pattern:** A text input field followed by a "Search" button.
- Search in:** Three radio buttons:  All words,  Any word, and  Exact phrase.
- Search in:** Four checkboxes:  Title,  Short description,  Detailed description, and  Search keywords.
- Search-and-modify
- Export search results to a CSV file
- Advanced search options**

and advanced search (accessible by clicking the **[+]** **Advanced search options** link):

### Search for products

**Search in category:**

as  Main category  Additional category

also search in subcategories

**Search for pattern:**

---

**Advanced search options**

#### Advanced search options

**SKU:**

**Product ID#:**

**Provider:**

**Price (\$):**  -

**Quantity:**  -

**Weight (lbs):**  -

**Availability:**

---

#### Additional options

**Free shipping:**  **Shipping freight:**

**Global discounts:**  **Tax exempt:**

**Min order quantity:**  **Low limit in stock:**

**List price:**

In basic search, you need to specify what you are looking for ('Search for pattern' field), where you want to look for it (all the 'Search in...' fields that apply) and (if the search pattern you provided is a not a single word, but a group of words) what components of the search pattern the results returned by your search need to match ('All words / Any word / Exact phrase').

**Note:** Matching by individual components of a search pattern (All words / Any word / Exact phrase) is available only when the

option 'Allow searching by individual words of a search phrase' is enabled in General settings->General options. Please be aware that, when matching by individual components of a search pattern is enabled, a special filter ensures that service and link words that occur in the search pattern are ignored.

In advanced search, you can specify product details which the product(s) you are looking for must have.

**Note:** You need to specify only the parameters relevant to your search; the more information you provide about the product, the more accurate the search results will be.

- If you are doing this search in order to modify all the products that will be found, select the 'Search-and-modify' check box. If you wish to immediately export the search results to a CSV file, select the 'Export search results to a CSV file' check box.
- Click the **Search** button. This should make X-Cart search for the product(s) in the database and output a list of search results in a dialog box titled 'Search results':

**Search results**

[Search again](#) **Go**

[Check all](#) / [Uncheck all](#)

<input type="checkbox"/>	SKU	Product	Quantity	Price (\$)
<input type="checkbox"/>	SKU92	Cranium	100	34.99
<input type="checkbox"/>	SKU182	DUO	100	50.00
<input type="checkbox"/>	SKU93	Lord of the Rings Board Game	80	34.99
<input type="checkbox"/>	SKU183	MAESTRO	100	120.00
<input type="checkbox"/>	SKU94	Monopoly Junior	100	10.99

The operations below are for the first selected item only:

The 'Search results' dialog box provides an SKU, a quantity and a price for each of the found products.

The buttons in the bottom part of the dialog box allow you to perform various operations on the found products: you can delete, preview, modify and clone products, as well as update the products' quantities and prices and generate HTML links. In addition to that, you can export all or some of the found products to a CSV file.

**Note:** X-Cart retains the parameters you define for a product search until your session expires. This means that, if you decide to do

a new search after you have already searched for something in your current session, the 'Search for products' form will still have all the settings you used during your previous search. Make sure these old settings agree with what you are going to search for or readjust the search parameters. If the advanced search section of the 'Search for products' form contains any settings which you do not need for your new search, you can quickly clear this section by clicking the Reset button at the bottom of the 'Search for products' form.

## Updating product quantities and prices

You can quickly update prices and quantities of products.

To update the quantity and/or the price of some product (or several products):

*If you are an X-Cart PRO administrator,*

1. Find the product(s) whose quantity/price you wish to update.
2. In the 'Search results' dialog box, edit the necessary quantities/prices.
3. Click the **Update** button. The edited quantities/prices will be updated.

*If you are an X-Cart GOLD administrator/provider or an X-Cart PRO provider,*

1. Open the Update inventory section in the Products menu.
2. Select 'Quantity in stock' or 'Pricing' from the drop-down box depending on what information you want to update.
3. Select CSV delimiter.
4. Browse and locate the prepared CSV file, containing the necessary changes.

**Warning!** Maximum file size that can be uploaded: 2Mb.

5. Click **Update**. The edited quantities/prices will be updated.

## Previewing product details


You can quickly preview the details of any product in your store.

To preview the details of some product:

1. Find the product whose details you wish to preview.
2. In the 'Search results' dialog box, select the check box next to the product name.
3. Click the **Preview product** button at the bottom of the 'Search results' dialog box.


This should open a product preview page with a summary of the product's details:

**Cranium #92**



SKU	SKU92
Category	
Vendor	provider
Availability	Available for sale

The outrageous new board game for your whole brain, containing 14 fun activities giving everyone a chance to shine.



**Price info**

---

Price	<b>\$34.99</b>
Quantity	100 item(s) available
Weight	1.00 lbs

**Modify** Go

**Clone** Go

**Delete** Go

You can use the links provided in the bottom part of the product preview box to modify, clone or delete the product. Clicking on the printer icon will open a printable version of the product preview page.

## Modifying products

You can modify previously created products, which means you can edit any of their details.

To modify a product:

1. Find the product that you wish to modify.
2. Open the product for modification. Do one of the following:
  - In the 'Search results' dialog box, select the check box next to the product name, then click the Modify selected button.
  - or*
  - In the 'Search results' dialog box, click the product name link.

This should open a page with the details of the selected product.
3. Change all the necessary product details.
4. Click the **Save** button to save the changes. The details of the product will be updated.
5. If necessary, add, edit or delete international descriptions and other additional features for the product.

### Group product editing (mass product editing)

If you need to make similar changes to more than one products, you might want to edit these products as a

group.

To modify several products simultaneously (using X-Cart's group product editing feature):

1. Find the products that you wish to modify.
2. In the 'Search results' dialog box, select the products that need to be modified (select the check boxes next to the product names).

**Note:** You can use the [Check all](#) link to select all the products on the page.

3. Click the **Modify selected** button.

This should open a page with a list of products selected for modification:

Product list	
SKU	Product
<a href="#">SKU94</a>	<a href="#">Monopoly Junior</a>
<b>SKU92</b>	<b>Cranium</b>
<a href="#">SKU182</a>	<a href="#">DUO</a>
<a href="#">SKU93</a>	<a href="#">Lord of the Rings Board Game</a>
<a href="#">SKU183</a>	<a href="#">MAESTRO</a>

and a 'Product details' dialog box displaying the details of a product whose name is written in bold font in the list of products selected for modification:

### Product details

**\* Note:** Check this checkbox to make the corresponding field common for these products

#### Product thumbnail

**Thumbnail**  
(recommended size  
50x50-150x150)



---

#### Details

**SKU:**

**Product name:**

**Search keywords:**

**Short description\* :**

**Apply global discounts**

Now you can view the details of any of the products from the 'Product list': all you need to do is click on the name of the product whose details you wish to view, and the details will be displayed in the 'Product details' dialog box below.

4. From the 'Product list', select a product whose details you wish to use as a model for all the products in the list. The details of this product will be opened for viewing and modification in the 'Product details' dialog box.
5. In the 'Product details' dialog box, change all the product details that need to be changed for the currently selected product. You can make any changes, no matter whether they need to be applied only



to this very product or to all of the products selected for modification.

6. You might have noticed that the 'Product details' dialog box looks a bit different when used in group product editing mode: all the fields of this dialog box have check boxes located to the left of their names. These check boxes allow you to assign the product details of the product you are viewing to the rest of the products selected for modification. Select the check boxes next to the fields which need to be applied to all of the products in the 'Product list'.
7. Click the **Save** button at the bottom of the 'Product details' dialog box to save the changes. The product details you have changed should be updated (The ones with selected check boxes should be applied to all of the products in the 'Product list', the ones whose check boxes were left unselected - just to the product whose details are displayed in the 'Product details' dialog box).
8. (*Optional*) Now, if you need to make further changes to any more products from the 'Product list', select one of these products so its details are displayed in the 'Product details' dialog box and continue editing as described above.
9. (*Optional*) Add, edit or delete international descriptions and other additional features for one of the products and apply the changes to all the products being edited.

## Cloning products

X-Cart's 'Clone product' feature allows you to create new products based on existing products. If you wish to create a product whose details would be just a little different from those of another product already existing in your store, the best and quickest way to do it would be by cloning. When you clone an existing product, X-Cart creates an exact copy of this product in the database. This copy (the clone product) can then be modified and saved with a new name.

To create a product by cloning:

1. Find the product that you wish to clone.
2. In the 'Search results' dialog box, select the check box next to the title of this product.
3. Click the **Clone product** button at the bottom of the 'Search results' dialog box. X-Cart will create a copy of the product. After an automatic page refresh you should see a 'Product details' dialog box with the details of the clone product. The clone product will have the same details as the original product; its name will consist of the name of the original product + (CLON).
4. Change the name of the clone product and edit all the necessary product details and additional product features.

5. Click the **Save** button to save the changes. The product will be added.

## Generating HTML links

It is possible to use products from your X-Cart database not only on the pages of your store catalog, but also on any other HTML pages in the same online store or on a different website. For example, you can place a description and a thumbnail image of some product on an external page somewhere on the Web and provide an 'Add to cart' link next to the description, so visitors of this external page can purchase the product directly from there. Visitors who will click the link will be redirected to the shopping cart section in your X-Cart based store, so their further steps towards placing an order will be the same as those of any customer ordering a product from your store catalog.

On demand, X-Cart can generate HTML code which can be integrated into HTML pages to create links to products.

Three types of HTML links are supported:

- *links to product thumbnails* - links allowing you to insert product thumbnail images into any HTML pages:

**Link to product thumbnail**



**HTML-code:**

```

```

- *simple HTML links to add 1 product to cart* - links allowing a visitor of an external page to add one item of a product to the shopping cart:

**Simple HTML link to add 1 product to cart**

**Add to cart** Go

**HTML-code:**

```
<table cellpadding="0"
class="SimpleButton"><tr><td><a class="Button"
href="http://xcart.crtdev.local/~svowl/eshop_dohatur/cart.p
hp?mode=add&productid=92&amount=1">Add to
```

- *advanced HTML links with selectable quantity and product options support* - links allowing a visitor of an external page to see the price of the product, to select the number of product items which should be added to cart and to specify a desired set of product options with which these items should be added.

**Advanced HTML link with selectable quantity and product options support**

**Price:** **\$34.99** (€30.44)

Gift pack:

Quantity:

**Add to cart**

**HTML-code:**

```
<script type="text/javascript">
<!--
var number_format_dec = ',';
var number_format_th = '';
var number_format_point = '2';
var store_language = '';
var xcart_web_dir = "/~svowl/eshop_dohatur";
var lbl_no_items_have_been_selected = "";
-->
</script><script
```

Every time you tell X-Cart to generate HTML links to a certain product, it generates links of all the three types. You can choose any one link or use a combination of a thumbnail link with any of the two 'Add to cart' links.

To get X-Cart to generate HTML links:

1. Find the product for which you need HTML links.
2. In the 'Search results' dialog box, select the check box next to the title of this product.
3. Click the **Generate HTML links** button at the bottom of the 'Search results' dialog box. X-Cart will generate links of the three types described above. This is it. You should see a preview of the product's details and (below the preview section) three forms with previews of links and corresponding HTML code.

Now you can copy the HTML code for the desired link(s) and paste it into the code of your external page.

## Deleting products

Products that you do not wish to sell ever again can be deleted (permanently removed from the database).

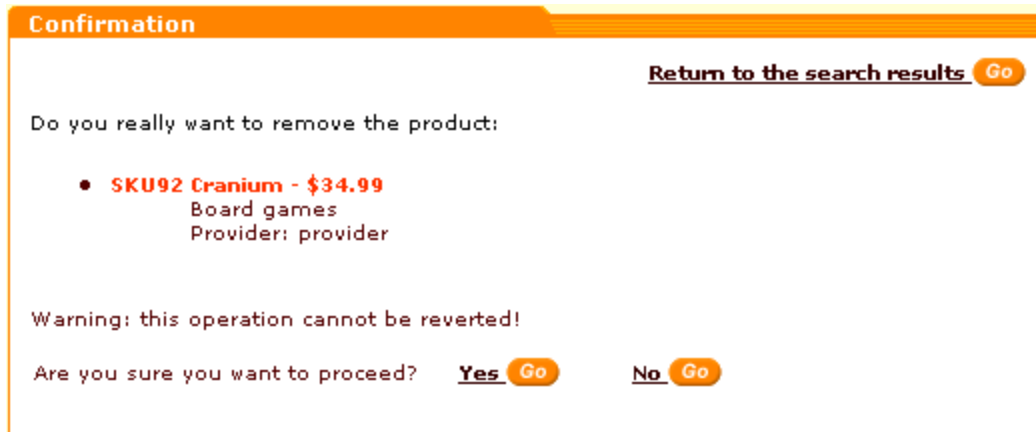
To delete one or more products:

1. Find the products that you wish to delete.
2. Mark these products for deletion by selecting the check boxes next to their names in the 'Search

results' dialog box.

3. Click the **Delete selected** button.

A confirmation box will appear with a list of products selected for deletion:



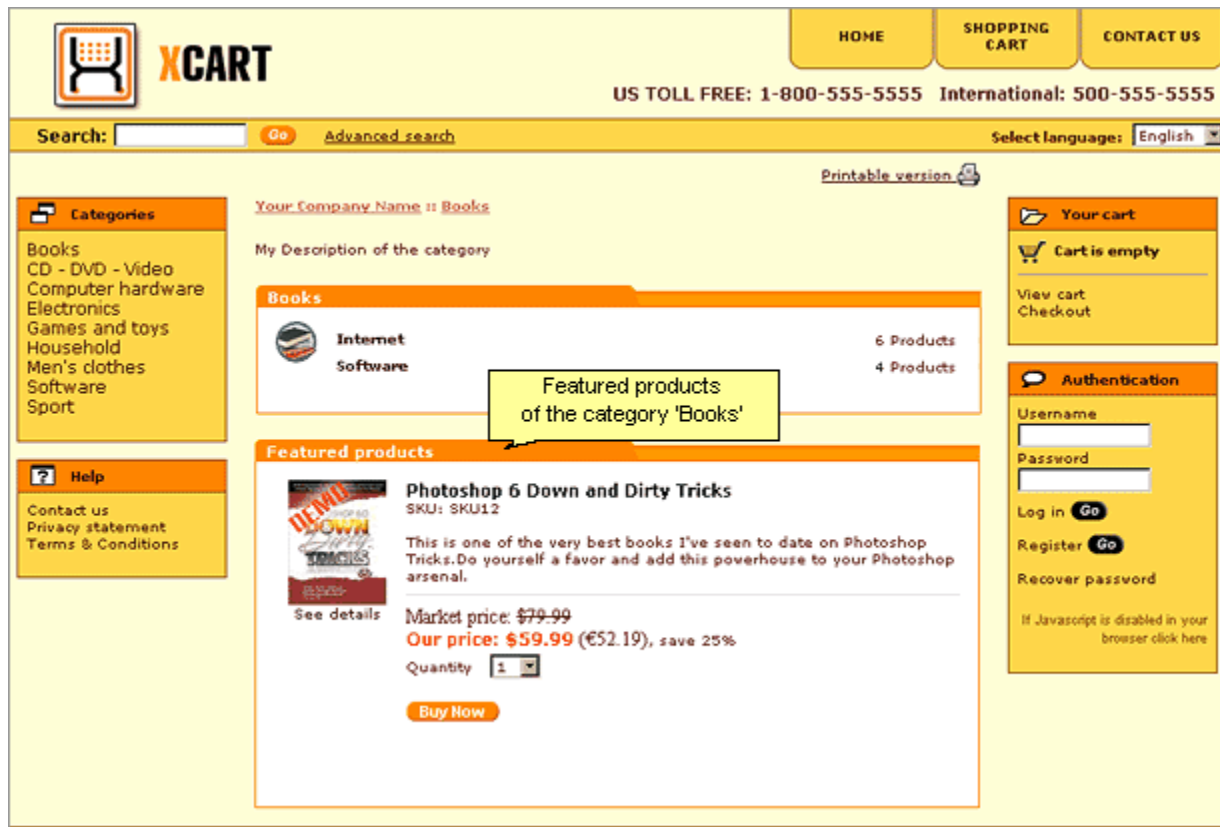
4. Click **Yes** to confirm your desire to delete the products (Please be aware that this operation cannot be reverted!). All the selected products will be removed. After an automatic page refresh, you should see an information box with a confirmation message.

**Note:** If you clicked the button Delete selected by mistake and do not wish to delete the products, cancel the operation of deletion by clicking No.

## 4.3 Featured Products

### Featured products in X-Cart

For the purpose of promotion, you can have certain products in your store displayed as *featured*. A product is featured when you give it prominence by bringing it forward from the category where it is normally contained to a featured products list on the main page or on any of the category pages in the Customer zone.



The Customer zone main page and each of the category pages can have their own featured products lists. When you decide to make a product featured, it is possible to define, in what featured products list (on what page) it should appear. It is also possible to adjust the order in which products are arranged within each featured products list.

All the manipulations on featured products can be performed through the 'Categories Management' section of the Admin zone (Management menu->Categories).

## Roles in featured products management

If you are an X-Cart GOLD administrator/provider or an X-Cart PRO administrator:

- You can add existing products to featured products lists (Check out [Adding Featured Products](#)).
- You can manage featured products (See [Managing Featured Products](#)):
  - [change the order in which products appear in featured products lists](#),
  - [enable/disable products in featured products lists](#),
  - [delete products from featured products lists](#).

If you are an X-Cart PRO provider:

- You cannot define, which of your products will appear on the storefront as featured.

## 4.3.1 Adding Featured Products

To add a featured product:

1. Go to the 'Categories Management' section of the Admin zone (Management menu->Categories ). You should see a form titled 'Categories'.
2. Go to the category level where you want to add featured products.

**Note:** You can freely move between category levels by using category name links and the category level navigation bar: clicking on the name of a category brings you to a lower level in your category tree; clicking on a link in the category level navigation bar brings you to that specific level. See [Navigating the category tree](#) for details.

3. Scroll down to the 'Featured products' form (located below the 'Categories' form). The first time you see this form, it will be empty:

PRODUCT NAME	POS.	ACTIVE
No featured products		

**Add product**

On your subsequent visits, after you add some featured products on this level, the 'Featured products' form will provide a list of the featured products:

### Featured products

[Check all](#) / [Uncheck all](#)

	PRODUCT NAME	POS.	ACTIVE
<input type="checkbox"/>	<a href="#">Javascript (Definitive Guide)</a>	<input type="text" value="3"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<a href="#">Flash 5 for Windows and Macintosh</a>	<input type="text" value="4"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<a href="#">PATRICK Maracana HG Cleats</a>	<input type="text" value="5"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<a href="#">Adobe Photoshop 5.5 Classroom</a>	<input type="text" value="7"/>	<input checked="" type="checkbox"/>

### Add product

- Use the 'Add product' section of the 'Featured products' form to select a product to be added as featured:
  - Click the **Browse** button. A new window with a form titled 'Choose a product' will be opened.

### Choose a product

**Bookmarks:**

---

**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
- Computer hardware/CD & DVD
- Computer hardware/CPU Coolers
- Computer hardware/Cases
- Computer hardware/Keyboards
- Computer hardware/Memory chips
- Computer hardware/Monitors
- Computer hardware/Motherboards
- Computer hardware/Mouses
- Computer hardware/Personal assistants (PDA)
- Computer hardware/Portable computers
- Computer hardware/Printers
- Computer hardware/Processors

There are no available products under this category.

b) From the list of categories in the left-hand side of the form, select the category in which the desired product is located. Do one of the following:

- Double-click on the name of the category.
- Click on the name of the category (once, so the name is highlighted) and then click the button **Show products** at the bottom of the dialog box.

The products of the selected category should be listed in the right-hand side of the form:

**Choose a product**

**Bookmarks:**

Categories:	Products:
Books	Designing Web Usability
Books/Internet	Dreamweaver 3 Bible : Gold Edition
Books/Software	HTML 4 for the World Wide Web
CD - DVD - Video	Javascript (Definitive Guide)
CD - DVD - Video/CD audio	New Masters of Flash
CD - DVD - Video/DVD	Professional Java Server Programming
CD - DVD - Video/Video cassettes	
Computer hardware	
Computer hardware/CD & DVD	
Computer hardware/CPU Coolers	
Computer hardware/Cases	
Computer hardware/Keyboards	
Computer hardware/Memory chips	
Computer hardware/Monitors	
Computer hardware/Motherboards	
Computer hardware/Mouses	
Computer hardware/Personal assistants (PDA)	
Computer hardware/Portable computers	
Computer hardware/Printers	
Computer hardware/Processors	

Buttons: Show products, Select, Bookmark

c) Choose the desired product from the list and click on **Select**.

The product's title should appear in the appropriate field of the 'Add product' section of the 'Featured products' form.



### Featured products

[Check all](#) / [Uncheck all](#)

	PRODUCT NAME	POS.	ACTIVE
<input type="checkbox"/>	<a href="#">Javascript (Definitive Guide)</a>	<input type="text" value="3"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<a href="#">Flash 5 for Windows and Macintosh</a>	<input type="text" value="4"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<a href="#">PATRICK Maracana HG Cleats</a>	<input type="text" value="5"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<a href="#">Adobe Photoshop 5.5 Classroom</a>	<input type="text" value="7"/>	<input checked="" type="checkbox"/>

### Add product

5. (Optional) Use the field in the POS. column to specify the position number of the featured product being added in the list of featured products. If, for the moment, you choose to leave the position field empty, the product will be placed at the end of the featured products list. You will be able to readjust the position of the product in the featured products list at any time later.
6. (Optional) Unselect the check box in the ACTIVE column if you do not want the new product to appear in the featured products list on the storefront immediately. If you choose to leave the check box selected, the visitors of your store will be able to see the new featured product as soon as you add it.
7. Click the **Add new** button. The product should be added to the list of featured products in the 'Featured products' form and on the storefront.

### Featured products

[Check all](#) / [Uncheck all](#)

	PRODUCT NAME	POS.	ACTIVE
<input type="checkbox"/>	<a href="#">Javascript (Definitive Guide)</a>	<input type="text" value="3"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<a href="#">Flash 5 for Windows and Macintosh</a>	<input type="text" value="4"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<a href="#">PATRICK Maracana HG Cleats</a>	<input type="text" value="5"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<a href="#">Adobe Photoshop 5.5 Classroom</a>	<input type="text" value="7"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<a href="#">New Masters of Flash</a>	<input type="text" value="17"/>	<input checked="" type="checkbox"/>

---

#### Add product

## 4.3.2 Managing Featured Products

### Changing the order in which featured products appear on the storefront

If you want to change the order in which your featured products appear in a featured products list on the storefront, do the following:

1. Go to the 'Categories Management' section of the Admin zone (Management menu->Categories ). You should see a form titled 'Categories'.
2. Use the 'Categories' form to go to the category level where you want to change the order of featured products.

**Note:** You can freely move between category levels by using category name links and the category level navigation bar: clicking on the name of a category brings you to a lower level in your category tree; clicking on a link in the category level navigation bar brings you to that specific level. See [Navigating the category tree](#) for details.

3. Scroll down to the 'Featured products' form (located below the 'Categories' form).
4. Edit the position numbers of the featured products that need to be moved (POS. column).
5. Click on **Update**. The order of the featured products in the Customer zone should change.

## Disabling/enabling featured products

If you want to temporarily disable one or more products contained in a featured products list, do the following:

1. Go to the 'Categories Management' section of the Admin zone (Management menu->Categories ). You should see a form titled 'Categories'.
2. Use the 'Categories' form to go to the category level where you want to disable the featured products.

**Note:** You can freely move between category levels by using category name links and the category level navigation bar: clicking on the name of a category brings you to a lower level in your category tree; clicking on a link in the category level navigation bar brings you to that specific level. See [Navigating the category tree](#) for details.

3. Scroll down to the 'Featured products' form (located below the 'Categories' form).
4. In the ACTIVE column, unselect the check boxes for each of the featured products that you want to be disabled.
5. Click on **Update**. The disabled featured products should disappear from the featured products list on the storefront.

**Note:** Disabling a featured product is not the same as disabling a product. Disabling a featured product using the method described above removes the product from the featured products list on a specific page; it does not disable the product in the categories to which it is assigned or remove it from any other featured products lists. Disabling a product using the 'Availability' field in the 'Product details' form completely disables the product in the whole store so that customers cannot view its details or order it.

To enable one or more of the previously disabled featured products, select the check boxes in the ACTIVE column for these featured products and click on **Update**. The featured products should re-appear on the storefront.

## Deleting featured products

If you want to remove one or more products from a featured products list, do the following:

1. Go to the 'Categories Management' section of the Admin zone (Management menu->Categories ). You should see a form titled 'Categories'.
2. Use the 'Categories' form to go to the category level where the featured products you wish to delete are located.

**Note:** You can freely move between category levels by using category name links and the category level navigation bar: clicking on the name of a category brings you to a lower level in your category tree; clicking on a link in the category level navigation bar brings

you to that specific level. See [Navigating the category tree](#) for details.

3. Scroll down to the 'Featured products' form (located below the 'Categories' form).
4. Select the check box(es) next to the name(s) of the featured product(s) you wish to delete.
5. Click the **Delete selected** button below the featured products list in the 'Featured products' form. The featured products should be removed from the featured products list in the 'Featured products' form and on the storefront.

**Note:** Deleting a featured product is not the same as deleting a product. Deleting a featured product using the method described above removes the product from the featured products list on a specific page; it does not remove the product details from the database. Deleting a product via the 'Products Management' section irreversibly removes the product and all the related information from the database.

# 5 Operating Your Store

This section provides information on operating an X-Cart-based store.

- Refer to the section [User Profiles](#) for information on creating and managing user profiles.
- Study [User Memberships](#) for information on setting up and using memberships.
- See [Discounts](#) for information on creating and using discounts.
- Check out [Orders](#) for information on managing orders.
- See [Import/Export Procedures](#) for information on the procedures of importing and exporting data.
- Refer to [Store Statistics](#) for information on using statistical data gathered by X-Cart.
- Study the chapter [HTML Catalog](#) for details on how you can generate a static product catalog.

## 5.1 User Profiles

### User profiles in X-Cart

In X-Cart, any registered user has a user profile. A user profile is a collection of information associated with the user.

Typically, a user profile includes:

- personal information (title, first name, last name, etc),
- billing and shipping addresses,
- contact information (phone, email address, fax, etc),
- username and password.

A user profile is created as a result of completion of a 'Profile details' form.

### Roles in user profiles management

If you are an X-Cart GOLD administrator/provider or an X-Cart PRO administrator:

- You can control the set of fields included into the 'Profile details' form (See the section [User Profiles Options](#)).
- You can create user profiles for all types of users (Study the section [Creating User Profiles](#)).
- You can manage all existing user profiles (See the section [Managing User Profiles](#)):
  - find user profiles by certain parameters,
  - view and modify user profiles,
  - delete user profiles.

If you are an X-Cart PRO provider:

- You cannot create any user profiles.
- You cannot manage any user profiles except your own user profile.

## 5.1.1 Creating User Profiles

### Creating a new user profile

To create a user profile:

1. Go to the 'Users Management' section of your store's administration back-end (Management menu->Users).
2. In the section menu, click on the link corresponding to the type of user profile that you wish to create:
  - Administrator - use the link 'Create administrator profile',
  - Provider (available only in X-Cart PRO) - use the link 'Create provider profile',
  - Customer - use the link 'Create customer profile',
  - Partner (available only in stores using X-Affiliate add-on module) - use the link 'Create partner profile'.

A dialog box titled 'Profile details' opens.

3. Use the 'Profile details' dialog box to provide the user's personal information, billing and shipping addresses and contact information.
4. Leave the 'Signup for membership' box as is.
5. If you wish to assign some membership to the user whose profile you are creating, select the desired membership level from the 'Membership' drop-down box.
  - *Administrator profile:*
    - Select *Fulfillment staff* membership to provide the user with access only to statistics and orders.
    - Select *Not member* to provide the user with unlimited administrator privileges.
  - *Provider profile:*
    - Select *Root provider* membership to enable the user to control the products and settings of all other providers.
    - Select *Not member* to provide the user with normal provider privileges.
  - *Customer profile:* Select any membership you think appropriate.

For detailed information on user memberships, read the section [User Memberships](#) further in this manual.

6. Enter a username and a password.
7. Select the check box 'Require to change password on next log in' if you wish the user to be requested to change his or her password when he or she logs in next time (*Recommended for*

*security reasons*).

8. Click on **Save**. The user profile will be created.

**Note** (for users of X-Affiliate add-on module): After creating a partner profile, you need to approve the new partner using the 'Approve or decline partner profile' form.


## 5.1.2 Managing User Profiles

### Finding user profiles

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:



(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**. The search results will be displayed in the 'Search results' form.

#### Advanced search

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

### Advanced search options

<b>Search for user type:</b>	<input type="text" value="All"/>
<b>Customer registration type: *</b>	<input type="text" value="All"/>
<b>Search by address:</b>	<input checked="" type="radio"/> Ignore address <input type="radio"/> Billing <input type="radio"/> Shipping <input type="radio"/> Both
<b>City:</b>	<input type="text"/>
<b>State:</b>	<input type="text" value="[Please select one]"/>
<b>Country:</b>	<input type="text" value="[Please select one]"/>
<b>Zip/Postal code:</b>	<input type="text"/>
<b>Phone/Fax:</b>	<input type="text"/>
<b>Web site:</b>	<input type="text"/>
<b>Search for users that are:</b>	<input type="checkbox"/> Registered <input type="checkbox"/> Last logged in
<b>During the period:</b>	<input checked="" type="radio"/> This month <input type="radio"/> This week <input type="radio"/> Today <input type="radio"/> Specify the period below
<b>From:</b>	<input type="text" value="May"/> <input type="text" value="24"/> <input type="text" value="2004"/>
<b>Through:</b>	<input type="text" value="May"/> <input type="text" value="24"/> <input type="text" value="2004"/>

**Note:** Customer registration type is required if you search for customer usertype only.

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, email 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

Pagination 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 ('Users per page (admin)' and 'Maximum navigation pages' in General Settings->Appearance Options).

### Modifying user profiles

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 wish 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 wishes to get. (Customers can sign up for a more privileged membership level through the 'Profile details' form at the time of registration or at any other 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 user profiles

Every user can delete his own profile. The administrator can delete any profile.

To delete a profile:

1. Find the user profile you want to delete.

- In the 'Search results' form select the check box next to this user account.
- Click on **Delete selected**. You will be asked to confirm the deletion.

**Confirmation**

[Return to the search results](#) **Go**

Please check the list of users you have selected to delete and make sure this list includes only the users you really want to delete.

- jillb**: Customer  
**Ms. Jill Backer**  
Phone: phone / E-mail: jill\_backer79@hotmail.com  
Web site: n/a  
Shipping address:                      Billing address:  
    Test city,                              Test city,  
    Test address,                          Test address,  
    WI (Wisconsin) 54821,                WI (Wisconsin) 54821,  
    United States                          United States

Warning! This operation can not be reverted!

Are you sure you want to proceed?    Yes **Go**      No **Go**

- Review the profile information carefully and make sure it is really the profile you would like to delete. The deletion cannot be reverted. Click on **Yes** to delete the profile, **No** - to go back to the 'Search results'.

## 5.2 User Memberships

### Memberships in X-Cart

X-Cart shopping cart software makes it possible for you to define various membership levels for different types of store users.

Membership levels for customers are commonly used for marketing purposes. For example, membership levels can be set up in such a way that users of different levels will have different permissions for access to products and categories, will be taxed differently, will be able to use different discounts and will have different payment methods available to them.

Membership levels for administrators and providers regulate access of specific users to resources within respective X-Cart zones.

An installed X-Cart provides some pre-defined membership levels:

Type of user account	Pre-defined membership levels	Purpose
Customer	Premium Wholesale	Can be used to create customer groups with privileged access (e.g., to products/discounts/special offers/etc).
Administrator/provider (X-Cart GOLD) or Administrator (X-Cart PRO)	Fulfillment staff	Restricts access of the user to all the resources of X-Cart Admin zone except orders and statistics.
Provider (X-Cart PRO)	Root	Turns the user into a kind of super provider with access to the products and settings of all the other providers in the store. Does not allow the user to see the field 'Order details (not visible to customer and provider'. Can be used for the purpose of supervision only, <b>MUST NOT</b> be used to change any settings.

The above listed pre-defined membership levels can be used 'as is' or be renamed/deleted. At any moment you can create more membership levels for any user account type.

**Note:** With regard to admin and provider memberships, only *Root* and *Fulfillment staff* membership levels are employed by X-Cart to regulate access of users to X-Cart resources. Any other admin and provider memberships which you might create will not have any effect on the access level of the user, so you will be able to use them only as a basis for classification of admin and provider users.

Admin and provider memberships can be assigned to users only by administrators.

Depending on the value of the option 'Moderated sign-up for membership' defined in General settings->General options, customer users may or may not be able to sign up for memberships. When the option 'Moderated sign-up for membership' is enabled, a customer can select a desired membership level from the 'Signup for membership' box in his or her personal profile and submit the 'Profile details' form for administrator's approval. Administrator reviews the application and, in the case of a positive decision, assigns the membership to the user who requested it. When the option 'Moderated sign-up for membership' is disabled, there is no 'Signup for membership' box in the 'Profile details' form, but administrator can still assign memberships to customers.

## Roles in user membership management

If you are an X-Cart GOLD administrator/provider or an X-Cart PRO administrator:

- You can create membership levels for all types of users (Study the section [Adding User Memberships](#))

).

- You can manage all existing membership levels (See the section [Managing User Memberships](#)):
  - view and modify membership levels,
  - delete membership levels.

If you are an X-Cart PRO provider:

- You cannot create any membership levels.
- You cannot manage any membership levels.

## 5.2.1 Adding User Memberships

### Creating membership levels

To create a new membership level:

1. Go to the 'Edit Membership Levels' section of your store (Administration menu->Membership Levels). This section contains forms for adding membership levels for different types of user accounts.
2. If your store supports more than one languages, make sure the 'Language' box above the 'Membership levels' forms displays the name of the default store language.
3. Choose the appropriate 'Membership levels' form (customer, provider or admin).
4. Use the MEMBERSHIP field in the 'Add new' subsection of the form to type in the name for the new membership level.
5. If you wish the membership level to be activated immediately after it is added, select the ACTIVE check box.
6. (*Optional*) Adjust the order of the membership level relative to the other membership levels in the 'Membership' and 'Signup for membership' drop-down boxes by entering a position number into the ORDERBY field.
7. Select a membership level type from the TYPE drop-down box.
8. Click the **Add new** button. The membership level should be added to the list of membership levels available at your store.

### Managing international membership level names

If your store supports more than one languages, you need to provide names for membership levels in all the languages supported by your store.

To add a name for a membership level in a language other than the default store language:

1. In the 'Edit Membership Levels' section, switch the 'Language' box above the 'Membership levels' forms to display the name of the language in which you wish to add a membership level name. The language of the interface should change to the selected language.
2. In the list of available membership levels, find the membership level for which you wish to add a name in the language selected at the previous step.
3. Edit the name of the membership level, replacing its name in the default language by a name in the current language.
4. Click the **Update** button. The name for the membership level should be added.

**Note:** Names of membership levels for which foreign names are not defined are always displayed in the language in which they were created - regardless of the language of the interface selected as current.

## 5.2.2 Managing User Memberships

### Editing membership levels

If you wish to rename a membership level, change the position of a membership level name in the 'Membership' and 'Signup for membership' drop-down boxes or enable/disable a membership level, do the following:

1. Go to the 'Edit Membership Levels' section of your store (Administration menu->Membership Levels). This section contains forms listing membership levels for different types of user accounts.
2. If you are going to rename a membership level, make sure the 'Language' box above the 'Membership levels' forms displays the name of the language in which the membership level name needs to be changed. If you are not going to rename anything, the language does not matter.
3. Find the name of the membership level you wish to edit in one of the 'Membership levels' form (customer, provider or admin).
4. Edit the membership level details:
  - a) the membership level name - by editing the value of the MEMBERSHIP field;
  - b) the membership level's availability status - by using the ACTIVE check box;
  - c) the order of the membership level relative to the other membership levels in the 'Membership' and 'Signup for membership' drop-down boxes - by changing the position number in the ORDERBY field;
  - d) the membership level type - by selecting a different type from the TYPE drop-down box.
5. Click the **Update** button. The updated membership level details should be saved.

## Deleting membership levels

Membership levels that you no longer need can be deleted.

To delete a membership level:

1. Go to the 'Edit Membership Levels' section of your store (Administration menu->Membership Levels). This section contains forms listing membership levels for different types of user accounts.
2. Find the name of the membership level you wish to delete in one of the 'Membership levels' form (customer, provider or admin) and select the check box next to it.
3. Click the **Delete selected** button. The membership level should be removed.

## 5.3 Discounts

### Discounts in X-Cart

X-Cart allows you to provide purchase discounts on the merchandise that is sold by your store. Purchase discounts are price reductions given for large purchases. Unlike coupon code discounts, purchase discounts do not require your customers to enter any kind of secret code to get a discount. They are applied automatically to any order whose subtotal amount equals or is greater than a certain amount, which is placed by a user of a certain membership and contains at least one product in whose details the option 'Apply global discounts' is enabled.

### Roles in discount management

If you are an X-Cart GOLD administrator/provider or an X-Cart PRO provider:

- You can create discounts (Study the section [Adding Discounts](#)).
- You can manage your own discounts (Check out [Managing Discounts](#)).

If you are an X-Cart PRO administrator:

- You cannot create discounts or control the discounts created by providers.

## 5.3.1 Adding Discounts

To add a discount:

1. Go to the 'Discounts' section of the store back-end (Inventory menu->Discounts).

You should see a dialog box titled 'Edit purchase discounts'.

ORDER SUBTOTAL	DISCOUNT	DISCOUNT TYPE	MEMBERSHIP
No discounts defined			

**Add new discount**

2. Use the 'Add new discount' subsection of the 'Edit purchase discounts' dialog box to set the parameters of the new discount:

**ORDER SUBTOTAL** - Minimum order subtotal amount which an order must have to qualify for a discount.

**Note:** Order subtotal is the total cost of all the products in a customer's shopping cart before any taxes or discounts are applied.

**DISCOUNT** - Discount amount.

**DISCOUNT TYPE** - Type of the discount (absolute or percent).

**MEMBERSHIP** - Membership(s) that will be able to use the discount.

3. Click on **Add/Update**. The discount is added to the list of available purchase discounts in the upper part of the dialog box.



**Edit purchase discounts**

[Check all](#) / [Uncheck all](#)

	ORDER SUBTOTAL	DISCOUNT	DISCOUNT TYPE	MEMBERSHIP
<input type="checkbox"/>	<input type="text" value="1000.00"/>	<input type="text" value="5.00"/>	Percent, %	<div style="border: 1px solid gray; padding: 2px;">           All            Premium            Wholesale         </div>
<input type="button" value="Delete selected"/>		<input type="button" value="Update"/>		
<b>Add new discount</b>				
	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	Percent, %	<div style="border: 1px solid gray; padding: 2px;">           All            Premium            Wholesale         </div>
<input type="button" value="Add/Update"/>				

According to the screenshot above, Wholesale members will be able to get 5% off on orders of \$1000 and over.

Please note that, when an order qualifies for more than one purchase discount defined in this section, only the greatest discount is applied. If, besides a global purchase discount, a discount coupon needs to be applied, the coupon savings amount is deducted from what remains of the subtotal after the application of the purchase discount.

## 5.3.2 Managing Discounts

If necessary, you can change the parameters of any existing purchase discounts.

To edit one or more discounts:

1. Go to the 'Discounts' section of the store back-end (Inventory menu->Discounts).
2. In the 'Edit purchase discounts', edit the parameters of the discount(s) that need to be changed.
3. Click the **Update** button to save the changes.

The discounts that you no longer need can be deleted.

To delete one or more discounts:

1. Go to the 'Discounts' section of the store back-end (Inventory menu->Discounts).
2. In the 'Edit purchase discounts', select the check boxes next to the discount(s) that need to be

deleted.

3. Click the **Delete selected** button.

## 5.4 Orders

### Orders in X-Cart

In an X-Cart-based store, customers purchase products by placing orders. An order is a collection of information about a purchase, which includes:

- information about product items being purchased (product titles, quantities, prices);
- information about the customer who is making the purchase (personal information, billing and shipping addresses, contact information);
- information about the method of delivery selected by the customer (name of method, shipping cost);
- information about the payment method selected by the customer (name of method, payment details);
- discounts, coupon codes or gift certificates applied;
- total amount.

Each order has its unique order id number and, at any moment in time, is characterized by a status. For information on the system of order statuses used in X-Cart, see the section [X-Cart Order Statuses](#).

### Roles in order management

If you are an X-Cart GOLD administrator/provider or an X-Cart PRO administrator:

- You can manage all the orders in your store (Study the section [Managing Orders](#)):
  - search for orders,
  - view orders, edit customer notes, add notes that are not visible to customers and modify order details,
  - update order statuses,
  - print order invoices and shipping labels,
  - export orders,
  - delete orders.

If you are an X-Cart PRO provider:

- You can manage the orders that contain your products (Study the section [Managing Orders](#)):
  - search for orders,
  - view orders, edit customer notes, add notes that are not visible to customers,

- assign the status Complete to orders processed by admin,
- print order invoices and shipping labels,
- export orders.
- You cannot delete any orders.

## 5.4.1 X-Cart Order Statuses

At any moment in time, any order in X-Cart has one of the following statuses:

- Not finished (I),
- Queued (Q),
- Failed (F),
- Declined (D),
- Processed (P),
- Complete (C),
- Backordered (B).

*Not finished (I)*, *Failed (F)* and *Queued (Q)* are the statuses that X-Cart can assign to orders automatically.

*Queued* is the status of new orders. It indicates that an order has been placed and is waiting to be processed.

*Not finished* indicates that the payment transaction by which the customer was supposed to pay for the order has not been completed (The customer went to an online payment processor but has not returned yet; the transaction is neither successful nor failed).

*Failed* indicates that the payment transaction could not be processed.

*Processed* indicates that the payment has been received by the store. This status is automatically assigned to an order that is paid for using an online payment processor after a customer successfully completes the payment transaction. As to orders paid for using offline payment methods (credit card, check or phone ordering), this status needs to be assigned manually by the store admin.

*Complete* indicates that all work on the order has been completed. This status can be assigned to an order by the product provider after the order is shipped.

*Backordered* indicates that the order has been canceled by the customer. This status can be assigned to an order manually by the store admin.

*Declined* indicates that the order has been canceled by the store admin. It may be of use, for example, for orders that have been found fraudulent. This status is an equivalent of the automatic *Failed* status.

## 5.4.2 Managing Orders

### Finding orders

X-Cart allows you to search for orders contained in the store database.

To find a specific order:

1. Go to the 'Orders Management' section of your store.

*If you are an X-Cart GOLD administrator/provider or an X-Cart PRO administrator:* click on Orders in the Management menu.

*If you are an X-Cart PRO provider:* click on Search for orders in Your orders menu.

2. Use the 'Search for orders' form to provide criteria for your search.

You can use basic search:

#### Search for orders

Setting up advanced search parameters provides more relevant results.

**Date period:**  All dates  This month  This week  Today  
 Specify the period below

**Order date from:** February 03 2006

**Order date through:** February 03 2006

---

**Export search results to a CSV file**

[+ Advanced search options](#)

and advanced search (accessible by clicking the **[+]** [Advanced search options](#) link):

### Search for orders

Setting up advanced search parameters provides more relevant results.

**Date period:**  All dates  This month  This week  Today  
 Specify the period below

**Order date from:** February 03 2006

**Order date through:** February 03 2006

Export search results to a CSV file

---

### Advanced search options

You can set the additional parameters for more accurate search results.

**Order id:**  -

**Order total (\$):**  -

**Payment method:**

**Delivery method:**

**Order status:**

**Provider:**

Entirely or partially paid by Gift Certificate  
Global discount applied

---

**Phone/Fax:**

**E-Mail:**

Basic search allows you to search for orders by the date/period when they were placed.

You can select:

- 'All dates' to find orders placed on any date.
- 'This month' to find orders placed in the current month.
- 'This week' to find orders placed during the current week.
- 'Today' to find orders placed during the day.
- 'Specify period below' to be able to set a period more specifically (by providing the first and last days of the period in the 'Order date from' and 'Order date through' fields).

Advanced search allows you to specify additional search parameters to fine-tune your query.

**Note:** You need to specify only the parameters relevant to your search; the more information you provide about the order(s) being searched for, the more accurate the search results will be.

You can specify parameters pertaining to the order itself, to the products contained in the order or to the customer who placed the order.

The advanced parameters pertaining to the order itself can be found at the top of the advanced search section:

- 'Order id' - Range of order id's which needs to be found. You need to specify the initial and the final id's of the range. It is also possible to provide just one of the two values:
  - providing just the initial order id returns all the orders with id's ranging from the specified id to the greatest id in the database;
  - providing just the final order id returns all the orders with id's ranging from the smallest id in the database to the specified id.
- 'Order total' - Range of order totals which needs to be found. You need to specify the minimum and maximum order totals (or just one of the values - same as for the order id's).
- 'Payment method' - Order's payment method.
- 'Delivery method' - Order's shipping method.
- 'Order status' - Order's status (*Not finished, Queued, Processed, Backordered, Declined, Failed or Complete*).
- 'Provider' - the provider, whose products are included into the order.
- 'Order features' - Features pertaining to your order (To select multiple features, hold down the 'Ctrl' key while clicking the names of features with your mouse).

The advanced parameters pertaining to the products contained in the order can be found in the 'Search by ordered products' section:

- 'Search for pattern' - Substring that you wish to be searched for.
- 'Search in *Title / Options*' - Field of the table 'xcart\_order\_details' in which you wish the pattern specified in the 'Search for pattern' field to be searched for (Selecting *Title* enables search in the 'product' field, *Options* - in the 'product\_options' field).
- 'SKU' - SKU of the product contained in the order.
- 'Product ID #' - ID of the product contained in the order.
- 'Price' - Price range that includes the price of the product contained in the order.

The advanced parameters pertaining to the customer who placed the order can be found in the 'Search by customer' section:

- 'Customer' - Substring that you wish to be searched for (By default, search is conducted by the username of the customer who placed the order; if you select *First Name* or *Last Name* in the

following line, the substring will also be searched for in the 'firstname' and 'lastname' fields of the table 'xcart\_orders').

- 'Search in: *First Name / Last Name*' - Field of the table 'xcart\_orders' in which you wish the pattern specified in the 'Customer' field to be searched for - in addition to the customer's username (Selecting *First Name* enables search in the 'firstname' field, *Last Name* - in the 'lastname' field).
  - 'Search by address: *Ignore address / Billing / Shipping / Both*' - Specifies whether you wish the order to be searched for by the address of the customer who placed it or not:
    - select *Ignore address* if you wish customer's address to be ignored (Address fields are inactive if *Ignore address* radio button is selected);
    - select *Billing / Shipping / Both* to be able to specify an address.
  - 'City', 'State', 'Country', 'Zip/Postal code' - Customer address fields.
  - 'Phone/Fax' - Customer's phone or fax number.
  - 'E-mail' - Customer's email address.
3. If you wish to immediately export the search results to a CSV file, select the 'Export search results to a CSV file' check box.
4. Click the **Search** button. This should make X-Cart search for the order(s) in the database and output a list of search results in a dialog box titled 'Search results':

Search results

[Search again](#)

Check all / Uncheck all

#	STATUS	CUSTOMER	PROVIDER	DATE	TOTAL
<input type="checkbox"/> #1	Processed	John Smith (customer)	provider	03-02-2006	\$39.50
<input type="checkbox"/> #2	Backordered	John Smith (customer)	provider	03-02-2006	\$1549.00
<input type="checkbox"/> #3	Queued	John Doe (john_doe)	provider	03-02-2006	\$12.95
<input type="checkbox"/> #4	Declined	John Doe (john_doe)	master	03-02-2006	\$41.95

Gross total: **\$1643.40**

Totally paid: **\$39.50**

Update status

Invoices for selected

Quick labels for selected

Delete selected

### Export orders

Click on the button below to export all the orders found by this search query.

File format for export:

Standard

Export

Export all found

For each of the found orders, the 'Search results' dialog box provides the following details:

- # - order id;
- STATUS - order's current status;
- CUSTOMER - full name and username of the customer who placed the order;
- PROVIDER (the column is visible only to administrator users) - username of the provider who is the owner of the products contained in the order;
- DATE - date on which the order was placed;
- TOTAL - total amount of the order.

Clicking on an order in the 'Search results' dialog box allows you to view the details of this order.

The buttons below the search results allow you to perform various operations on the found orders:

- *X-Cart PRO admin and X-Cart GOLD admin/provider users* can update order statuses and delete selected orders.
- *all users* (X-Cart PRO admin, X-Cart PRO provider and X-Cart GOLD admin/provider) can print invoices and shipping labels for selected orders and export orders.

**Note:** X-Cart retains the parameters you define for an orders search until your session expires. This means that, if you decide to do



a new search after you have already searched for something in your current session, the 'Search for orders' form will still have all the settings you used during your previous search. Make sure these old settings agree with what you are going to search for or readjust the search parameters. If the advanced search section of the 'Search for orders' form contains any settings which you do not need for your new search, you can quickly clear this section by clicking the Reset button at the bottom of the 'Search for orders' form.

## Updating order statuses

If your store uses manual order processing, you have to change the statuses of orders manually.

Admin users (X-Cart GOLD and PRO) can change the current status of any order in the store to any other status. X-Cart PRO providers can only complete their own orders processed by admin.

To update the status of an order:

*Admin users:*

1. Find the orders whose statuses need to be updated.
2. Select the desired statuses from the drop-down boxes in the STATUS column of the 'Search results'.
3. Click the **Update status** button.

*Provider users:*

1. Open the order, whose status needs to be updated, for viewing.
2. Click the **Complete order** button at the bottom of the 'Order details' form.

## Viewing orders, adding notes and modifying order details

### Viewing orders

At any time, you can view any order that is stored in the database - provided you have the permissions to access this order.

To view an order:

1. Find the order.
2. In the 'Search results' dialog box, click on the order id, date of placement or total amount of the order.

This should open the 'Order details' page with all the information about the order.

### Updating an order's status

The status of an order opened for viewing can be updated directly from the 'Order details' page.

To update the status:

*Admin users:*

1. On the 'Order details' page, find the drop-down box displaying the order's current status.
2. From this drop-down box, select a new status.
3. Click the **Apply changes** button to save the changes.

The order status should change to the status you selected.

*Provider users:*

Click the **Complete order** button at the bottom of the 'Order details' form. The order status should change to *Complete*.

### **Editing customer notes**

If necessary, you can edit customer notes stored with an order or add notes of your own.

To edit customer notes:

1. On the 'Order details' page, find the 'Customer notes' text area.
2. Edit the text contained in this text area.
3. Click the **Apply changes** button to save the changes.

### **Adding notes to an order**

To add notes to an order opened for viewing:

1. On the 'Order details' page, find the 'Order notes (not visible to customers)' text area.
2. Type your notes into this text area.
3. Click the **Apply changes** button to save the changes.

### **Editing the 'Order details' field of any order**

Admin users have the ability to edit the 'Order details' field of any order.

To edit the 'Order details' field:

1. On the 'Order details' page, find the field 'Order details (not visible to customer and provider)'.  
2. Click the Edit mode link next to the field name. This should enable you to edit the contents of the 'Order details' field (Normally, this field is protected from writing).
3. Edit the order details.

4. Click the **Apply changes** button. This should turn off the Edit mode and save the changes.

## Printing order invoices and shipping labels for orders

X-Cart allows you to print order invoices and shipping labels for orders.

To print invoices:

1. Find the orders for which you need to print invoices.
2. Select the check boxes next to them in the 'Search results' dialog box.
3. Click the **Invoices for selected** button. A new window should appear displaying invoices for the selected orders.
4. Print the page contained in the new window.

To print shipping labels:

1. Find the orders for which you need to print shipping labels.
2. Select the check boxes next to them in the 'Search results' dialog box.
3. Click the **Quick labels for selected** button. A new window should appear displaying shipping labels for the selected orders.
4. Print the page contained in the new window.

## Exporting orders

X-Cart provides a number of options for exporting orders. It is possible to export all the orders stored in the database, all the orders returned by an order search query or just some specific orders. Several export formats are supported: *standard* format (for use with 4.1.x versions of X-Cart), *4.0.x compatible* format (three variations are available depending on the desired delimiter - tab, comma or semicolon) and, if QuickBooks module is enabled, *IIF (QuickBooks 2002, 2003)*.

To export all orders:

1. Go to the 'Orders Management' section of your store.

If you are an X-Cart GOLD administrator/provider or an X-Cart PRO administrator: click on Orders in the Management menu.

If you are an X-Cart PRO provider: click on Search for orders in Your orders menu.

2. Scroll down to the 'Export/Delete orders' section (admin users) / 'Export orders' section (provider users) and select the desired file format from the 'File format for export' drop-down box.
3. Click the **Export all** button.

If you have chosen to export orders in the *standard* format, X-Cart should save them to an order set, which you will be able to use for further export according to X-Cart 4.1.x export scheme. You should see an Information box with a confirmation message.

If you have chosen any format other than *standard*, you should be offered to save the results of order export on your local computer in the form of a CSV or IIF file.

To export specific orders:

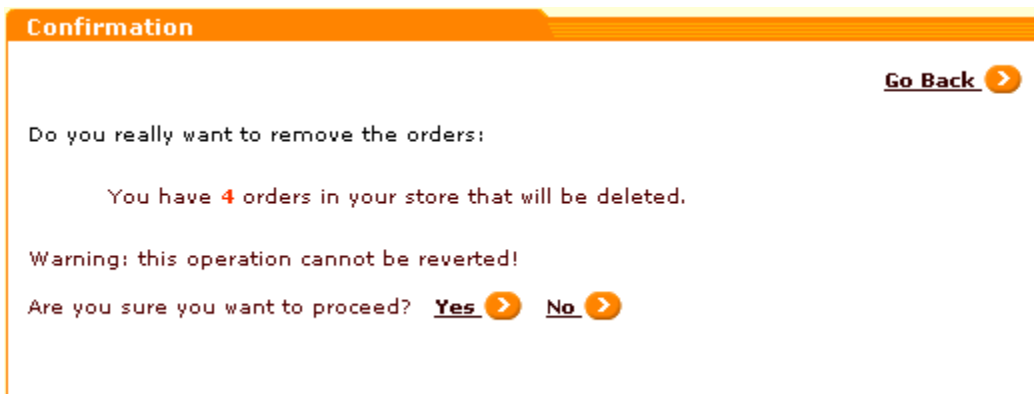
1. Find the orders that need to be exported.
2. In the 'Export orders' subsection of the 'Search results' dialog box, select the desired file format for export.
3. Do one of the following:
  - If you wish to export all the found orders, click the **Export all found** button.
  - If you wish to export just some of the returned results, select the check boxes next to the orders that need to be exported and click the **Export** button.

## Deleting orders

X-Cart allows admin users to delete orders. If you are an administrator, you can delete some or all of the orders stored in the database.

To delete all orders:

1. Click on Orders in the Management menu to go to the 'Orders Management' section of your store.
2. Scroll down to the 'Export/Delete orders' section.
3. Click the **Delete All Orders** button. You should see a confirmation box saying how many orders have been selected for deletion and asking you, if you really want to delete them:



4. Click **Yes** to confirm your desire to delete the orders. All the selected orders should be removed. Please be aware that this operation cannot be reverted. (To cancel the operation, click **No**).

If you have chosen to delete the orders, the orders will be deleted. You should see an information box with a confirmation message.

To delete some specific orders:

1. Find the orders that need to be deleted.
2. In the 'Search results' dialog box, select the check boxes next to the orders that need to be deleted.
3. Click the **Delete selected** button. You should see a confirmation box with an information summary of the orders selected for deletion, asking you, if you really want to delete the orders:



4. Click **Yes** to confirm your desire to delete the orders. All the selected orders should be removed. Please be aware that this operation cannot be reverted. (To cancel the operation, click **No**).

If you have chosen to delete the orders, the orders should be deleted. You should see an information box with a confirmation message.

## 5.5 Import/Export Procedures

### Import/Export procedures in X-Cart

X-Cart 4.1.x features export and import of almost all X-Cart data types. Export and import procedures facilitate the updating of your store data and allow you to consistently transfer data when upgrading your store or moving it to a new location.

Basic information on export procedures is available in the section [Exporting Data](#), import procedures - in the section [Importing Data](#).

Detailed information on X-Cart import and export can be found in the [Import/Export Guide for X-Cart v4.1.x](#) (available for download from <http://www.x-cart.com/manuals.html>).

### Roles in Import/Export management

If you are an X-Cart GOLD administrator/provider, you can import and export:

- config data,
- states,
- users,
- categories (including international category descriptions),
- products (including international product descriptions, featured products and product links),
- destination zones,
- taxes (including tax rates),
- shipping rates,
- orders (export only, including order items),
- other types of data (depending on the set of enabled modules and add-ons).

If you are an X-Cart PRO administrator, you can import and export all types of X-Cart data:

- config data,
- states,
- users,
- categories (including international category descriptions),
- products (including international product descriptions, featured products and product links),
- destination zones,
- taxes (including tax rates),
- shipping rates,

- orders (export only, including order items),
- other types of data (depending on the set of enabled modules and add-ons).

Note that, when exporting products, destination zones, tax rates, shipping rates and orders, it is possible to export all data or just the data of a specific provider. Also note that these types of data can only be imported specifically for different providers (which means that before importing you will be supposed to specify the name of the provider for whom you are importing the data).

If you are an X-Cart PRO provider, you can import and export:

- your products (including international product descriptions and product links),
- your destination zones,
- your tax rates,
- your shipping rates,
- your orders (export only, including order items),
- other types of data according to your access privileges (depending on the set of enabled modules and add-ons).

## 5.5.1 Exporting Data

Export of X-Cart data can be performed using the 'Export data' section of your store back-end.

To access this section:

1. Go to the 'Import/export data' section of your store back-end:

*If you are an X-Cart GOLD administrator/provider or an X-Cart PRO administrator:*

Click the link Import/Export in the Administration menu.

*If you are an X-Cart PRO provider:*

Click the link Import/Export in the Products menu.

2. In the 'Import/export data' section menu, click the link Export data.

The 'Export data' section looks something like this (with the reservation that the section **[+] Select provider** is available only to X-Cart PRO administrators, and the set of data types available for exporting varies on the type of user account being used):

### Export data

This form allows you to export your store data. Adjust the export options below to define how your store data should be exported.

[+ Select provider](#)

---

#### Export data

**CSV delimiter:**

**Category path separator for "category" field:**

This must be a single char or a sequence of chars that does not occur in the category names.  
 Examples: Books/Software, Books//Software, Books||Software

[Check all](#) / [Uncheck all](#)

	DATA TYPE	RANGE
<input type="checkbox"/>	CATEGORIES	
<input type="checkbox"/>	MULTILANGUAGE CATEGORIES	
<input type="checkbox"/>	CONFIG	
<input type="checkbox"/>	ORDERS	0 <a href="#">Change / Remove data range</a>
<input type="checkbox"/>	ORDER ITEMS	
<input type="checkbox"/>	SHIPPING RATES	

To export data to a CSV file:

1. Use the settings of the 'Export data' dialog box to specify, what data you wish to be exported and how you wish that to be done:
  - a) (If you are an X-Cart PRO administrator) If you wish to export not all the data, but just the data of a specific provider, specify the username of the provider whose data you wish to export: expand the 'Select provider' subsection of the 'Export data' dialog box by clicking the **[+] Select provider** link, enter the username of the provider into the appropriate field and click the **Go** button.
  - b) Use the 'CSV delimiter' drop-down box to select a delimiter that you wish to be used in the resulting CSV file (*Semicolon, Comma, Tab*).
  - c) If you wish the export spreadsheet to be split into several portions (each in a separate file), use the '



Data rows per file' field to specify the maximum number of data rows which may be contained in one file. Leave the field empty or enter 0 (zero) if you do not want to split the export file.

d) Specify, whether you wish to export images (*Yes/No*).

e) Use the field 'Category path separator for "category" field' to type in a character or a sequence of characters that you wish to be used as the 'category' field separator in the export CSV file. You can use any character or sequence of characters that does not occur in the category names.

f) Select the data that needs to be exported:

i. If you are going to export USERS, PRODUCTS or ORDERS, adjust the respective data ranges (use the links in the RANGE column).

ii. Select the types of data that need to be exported (select the check boxes next to the names of these types).

2. Click the **Export button** at the bottom of the 'Export data' dialog box. X-Cart should start exporting the data. Export packs will be saved to the directory `/xcart/var/tmp`.

As soon as the export process is completed, you should see an Information box with a confirmation message and a link to the export packs.

3. Click the **Export packs** link in the Information box or scroll down to the bottom of the 'Export data' section. You should see a new subsection in the 'Export data' dialog box - 'Export packs' - listing the CSV files created as a result of exporting procedure.

4. Download the export pack files onto your local machine by clicking the file name links.

If you wish to remove export packs from the directory to which they are saved by X-Cart (`/xcart/var/tmp`), you can delete them using X-Cart interface.

To delete export packs:

1. Expand the 'Export packs' subsection of the 'Export data' dialog box.

2. Select the check boxes next to the export packs that need to be removed.

3. Click the **Delete selected** button. The selected export packs should be removed. You should see an Information box with a confirmation message.

## 5.5.2 Importing Data

Import of X-Cart data can be performed using the 'Import data' section of your store back-end.

To access this section:

1. Go to the 'Import/export data' section of your store back-end:

*If you are an X-Cart GOLD administrator/provider or an X-Cart PRO administrator:*

Click the link Import/Export in the Administration menu.

*If you are an X-Cart PRO provider:*

Click the link Import/Export in the Products menu.

2. In the 'Import/export data' section menu, click the link Import data.

The 'Import data' section looks like this (with the reservation that the section **[+] Select provider** is available only to X-Cart PRO administrators, and the set of data types available for importing varies depending on the type of user account being used):

**Import data**

This section allows you to import into your store various kinds of data stored in CSV format. Typically, data import functionality is used for re-importing automatically generated CSV files to which store data was exported before upgrading the store or moving it to a new location. If for some reason you need to import manually created files, be sure to arrange the data in these files in the format that X-Cart will be able to recognize. The simplest way to find out what the importing format for a specific data type should be is to export existing data of that type and use the resulting CSV file as an example.

[See a sample import file here](#) 

 [Select provider](#)

---

**Import data**

By importing data via the form below you can create new zones and tax rates as well as update the existing ones.

**CSV delimiter:**

**The source of import file:**

Server  
 Home computer  
 URL

**CSV file is located on the server:**  
  
 The file path specified here must be absolute,  
 e.g.: /u/xcart/public\_html/eshop\_dohtur/files

 [Import options](#)

To import data into X-Cart:

1. Prepare a CSV file for import. Make sure it contains all the necessary required fields (For a list of fields

that are required for a specific data type, refer to the table in the 'Import options' section of the 'Import data' dialog box (accessible by clicking the link **[+] Import options**). Make sure the types of data you are going to import are listed in the table (If not, ensure that the modules/add-ons that use these types of data are enabled).

2. Use the settings of the 'Import data' dialog box to specify, what data you wish to be imported and how you wish that to be done:

a) *(If you are an X-Cart PRO administrator)* Certain types of X-Cart data (like PRODUCTS, SHIPPING RATES, TAX RATES, etc) cannot be imported without an indication of which provider they belong to. If you are importing provider-specific data, be sure to specify the username of their owner: expand the 'Select provider' subsection of the 'Import data' dialog box by clicking the **[+] Select provider** link, enter the username of the provider into the appropriate field and click the **Go** button.

b) Use the 'CSV delimiter' drop-down box to select a delimiter that is used in the CSV file which you are going to import (*Semicolon, Comma, Tab*).

c) Specify the source of the import file:

- i. Select the appropriate radio button to specify, whether the CSV file is located on the server where your X-Cart is installed, on your local machine or some web-accessible location (*Server, Home computer, URL*).
- ii. Depending on the location selected, provide a file path or a URL.

d) Expand the section 'Import options' by clicking the **[+] Import options** link and adjust the settings in this section:

- i. If you are importing users, specify, whether customer passwords are encrypted (Yes/No).
- ii. If you are importing products, set the Default category (a category where your products will go if you did not specify a category in the 'Category' column. Just leave this field alone if you have specified a category in your CSV file).
- iii. If your CSV file contains mention of subcategories (for example, if some of the products being imported will go to subcategories), make sure the Category path separator for "category" field specified in the 'Import options' section is exactly the same as the separator used in your CSV file.
- iv. If you are importing images (thumbnail images, product images, category icons, etc) and wish to import them from a single directory, specify this directory as Directory where images are located.
- v. If your store database already contains data of the types that you are going to import, and you wish to drop this data before importing data from your spreadsheet, select the DROP check boxes next to the names of data types that need to be dropped. (If you do not select any check boxes, the data from your spreadsheet will simply be added to the database).

2. Click the **Import** button at the bottom of the '**Import data**' dialog box. X-Cart should start importing the data.

As soon as the export process is completed, you should see an Information box with a confirmation message.

## 5.6 Store Statistics

Your X-Cart-based store gathers statistics allowing you to evaluate the overall efficiency of your store.

By default, the 'Statistics' section of your store's administration back-end (Management menu-> Statistics) allows you to view the following types of statistical data:

- [General statistics](#)
- [Log-in history](#)
- [Visitors environment statistics](#)
- [Search statistics](#)

**Note:** X-Cart has two modules that can also gather statistical data and display them in your store's 'Statistics' section - Advanced Statistics module and Users online module.

### 5.6.1 General Statistics

General statistics allows you to find out how many customers, providers, products, root categories, subcategories and orders you have in your store and how many customers, providers, products and orders were added during a certain period.

To view your store's General statistics:

1. Go to the 'Statistics' section of your store's administration back-end (Management menu-> Statistics).
2. Select the subsection 'General statistics' from the section menu.
3. Use the 'Date setting' dialog box to set the time period for which you wish to view statistics.

The section below displays the respective statistics:

**Total statistics****TOTAL STATISTICS**

Number of customers	1
Number of providers	3
Number of products	100
Number of root categories	9
Number of subcategories	30
Number of orders	3

**GENERAL STATISTICS FOR PERIOD: 01-06-2004 00:00:00 - 15-06-2004 12:19:12**

New customers	1
New providers	0
New products	0
New orders	3

## 5.6.2 Log-in History

The 'Log-in history' section allows you to get information about the users that logged into your store during a certain period.

To view your store's Log-in history statistics:

1. Go to the 'Statistics' section of your store's administration back-end (Management menu-> Statistics).
2. Select the subsection 'Log-in history' from the section menu.
3. Use the 'Date setting' dialog box to set the time period for which you wish to view statistics.

The section below displays the respective statistics:

**Log in history**

DATE	LOGIN	USERTYPE	ACTION	IP	STATUS
15-06-2004 15:11:51	<a href="#">customer</a>	C	login	192.168.10.66	success
15-06-2004 15:12:09	<a href="#">admin</a>	A	logout	192.168.10.66	success
15-06-2004 15:12:16	<a href="#">admin</a>	A	login	192.168.10.66	success
15-06-2004 15:12:59	<a href="#">customer</a>	C	logout	192.168.10.66	success
15-06-2004 15:13:09	<a href="#">customer</a>	C	login	192.168.10.66	failure

For each user you can see the time of his log-in and log-out, the login name, the user type to which he or she 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 in to the store, the log-in attempt is marked 'failure').

You can view the profile details of any user by clicking on his login name.

### 5.6.3 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.

To view your store's Visitors environment statistics:

1. Go to the 'Statistics' section of your store's administration back-end (Management menu-> Statistics).
2. Select the subsection 'Visitors environment statistics' from the section menu.
3. Use the 'Date setting' dialog box to set the time period for which you wish to view statistics.

The section below displays the respective statistics:

Visitors enviroment statistics						
BROWSER	PLATFORM	SCREEN RESOLUTION	JAVA	JAVASCRIPT	COOKIE	NUMBER
MSIE 6	Win32	1024x768	Enabled	Enabled	Enabled	3

The column NUMBER shows the number of visits of users using a similar environment.

### 5.6.4 Search Statistics

The 'Search statistics' section allows you to find out what words or phrases your customers used during a certain period to find products at your store.

To view your store's Search statistics:

1. Go to the 'Statistics' section of your store's administration back-end (Management menu-> Statistics).
2. Select the subsection 'Search statistics' from the section menu.
3. Use the 'Date setting' dialog box to set the time period for which you wish to view statistics.

The section below displays the respective statistics:

Search statistics	
SEARCH STRING	DATE
web	Jun 15, 2004
design	Jun 15, 2004

The SEARCH STRING column displays the search string that was submitted to X-Cart's product search engine. The DATE column shows when the query was performed.

## 5.7 HTML Catalog

### HTML catalog in X-Cart

Modern search engines tend to give better rankings to static HTML pages than to pages generated dynamically. X-Cart provides dynamic interactive experience to its users by generating web pages whose contents can change depending on specific conditions. In this sense, your store pages are dynamic and may be ranked less highly in search engines. To compensate for this, X-Cart provides a feature that can improve the standing of your product catalog pages with search engines - HTML catalog.

HTML catalog is a static version of the storefront. It exists simultaneously with the dynamic version of your store and consists of basic HTML pages including index.html (the main index page; corresponds to home.php at the time of catalog generation), category pages, manufacturer category pages (if the module Manufacturers is enabled and manufacturers are defined), product pages and static embedded pages (if any). The pages in a static HTML catalog look exactly the same as the respective pages in the dynamic part of the store at the time of catalog generation. Links to category pages, manufacturer category pages, product pages and static embedded pages provided on static HTML catalog pages lead to the respective pages in the static HTML catalog. Other links like 'View cart' or 'Advanced search' lead to the dynamic part of the store (pages like cart.php, search.php, etc).

Shoppers who are referred to the static HTML catalog of your store through search engines use your static catalog to view information about products. When they attempt to add a product to the shopping cart, to do a search or to perform any other operation that requires X-Cart to respond by generating a page of requested content, they are redirected to the dynamic part of the store.

**Important:** Please note that links to category pages, manufacturer category pages, product pages and embedded pages provided in the dynamic part of the store lead to the respective dynamic pages, not to the static pages in the HTML catalog. This means that customers who are redirected from the static HTML catalog to the dynamic part of the store do not return to the static HTML catalog if they use these links. The only way to return to the static HTML catalog pages after you have been redirected to the dynamic part of the store is by

using the Back button of your web browser or by pointing your browser directly to a static HTML catalog URL.

## Roles in HTML catalog management

If you are an X-Cart GOLD administrator/provider or an X-Cart PRO administrator:

- You can generate HTML catalogs (See [Generating an HTML Catalog](#)).
- You can update existing HTML catalogs (See [Updating an Existing HTML Catalog](#)).

If you are an X-Cart PRO provider:

- You cannot generate or update HTML catalogs.

### 5.7.1 Generating an HTML Catalog

To generate an HTML catalog:

1. Go to the 'HTML catalog' section (Administration menu->HTML catalog). A dialog box titled 'HTML catalog' opens.



### HTML catalog

The server directory where the HTML-catalog will be generated:  
**/home/user/public\_html/xcart/catalogalog**

You will access your HTML-catalog via this URL:  
**http://example.com/xcart/catalog/index.html**

Drop the old catalog before generating the new one   
Warning! This option will remove all \*.html files (except shop\_closed.html) in the catalog directory before generating a new html catalog.

Category:

Run through subcategories:

Generate HTML pages for:

Number of pages per one pass (Use this if you get timeouts when generating the catalog in one pass):

Style of catalog filenames:   
**File mask example:**  
`{category_name}-{sort}-p-{page}-c-{categoryid}.html`

Convert embedded static pages:

Generate catalogs for the following languages:

LANGUAGE	CATALOG PATH
German	<input type="text"/>
French	<input type="text"/>
Swedish	<input type="text"/>
English	<input type="text" value="/catalog"/>

2. Scroll down to the bottom of the 'HTML catalog' dialog box and find the subsection 'Generate catalogs for the following languages' in its lower part. This subsection provides a list of all the languages currently supported by your store. Decide on the language for which you would like to generate an HTML catalog and use the input field provided next to the name of this language to specify the directory to which you would like the respective catalog to be generated. It is possible to generate HTML catalogs for more than one language at once; in this case, you need to provide a catalog path for each of the languages for which a catalog will be generated. The directory paths can be specified relative to your X-Cart installation directory. For example, if your store is located in /home/user/public\_html/xcart (which, for example, corresponds to the URL http://www.example.com/xcart), and you specify the catalog path as "/catalog", the HTML

catalog will be generated to the directory `/home/user/public_html/xcart/catalog` and will be accessible from the Web at `http://www.example.com/xcart/catalog/index.html`.

**Important:** Always generate each of your HTML catalogs to its own directory, which should preferably be empty.

**Note for UNIX users:** Before generating an HTML catalog, be sure to set world writable permissions (`chmod 0777`) on the directory to which the HTML catalog will be generated. After the catalog generation is completed, change the permissions back to `0755`.

3. Select the check box 'Drop the old catalog before generating a new one' to tell X-Cart that you wish all HTML and HTML files to be removed from the catalog output folder before the new HTML catalog is generated. (Leaving this checkbox unselected will do no harm if the directory that you have specified as an output folder for your HTML catalog at the previous step is empty; however, if you have already used the specified directory as an output folder for generating an HTML catalog before, it is important that you select this check box - otherwise the pages of the new catalog may be mixed up with the pages of the previously generated catalog).
4. Specify what you wish to include into your HTML catalog:
  - a) Use the 'Category' drop-down box to select the category/categories whose contents you wish to include into your HTML catalog. In the long run, your HTML catalog will need to contain all of your store's categories and products, so when you are generating a new HTML catalog, the option *Root categories* is a good choice.
  - b) Select the check box 'Run through subcategories' to tell X-Cart that you wish to include the subcategories of the selected category/categories into your HTML catalog.
  - c) Use the drop-down box 'Generate HTML pages for' to specify the type of pages that should be generated. When you are generating a new HTML catalog, the option *Categories and products* is a good choice.
  - d) Select the check box 'Convert embedded static pages' to tell X-Cart that you wish to include your store's embedded static pages into your HTML catalog.

**Note:** The index.html page of your HTML catalog will provide links to all of your store's root categories and embedded static pages, and category pages will provide links to the subcategories and products contained in them. If you fail to generate static pages for certain categories, products or embedded pages, the respective static pages will be missing from your HTML catalog and you will have broken links.

5. Use the option 'Number of pages per one pass' to select the number of HTML catalog pages that you would like to be generated per one pass. The option *All* is a good choice as long as your products database is not too large.

**Note:** If you have an excessively large products database, you will probably not be able to complete the process of generating your HTML catalog without timing out. If you get timeouts when generating your HTML catalog, select a number of pages that seems appropriate for your database size and server performance and try again. X-Cart will generate the HTML catalog in portions.

6. Select a filename style for the pages of your HTML catalog. Choose one of the following:
  - *With hyphens in filenames (4.0):* {category\_name}-{sort}-p-{page}-c-{categoryid}.html
  - *With hyphens in filenames:* {category\_name}-{sort}-p-{page}-c-{categoryid}.html

- *New (3.5.x):* {category\_name}\_{sort}\_page\_{page}\_c\_{categoryid}.html
- *Old (pre 3.5.x):* category\_{categoryid}\_{category\_name}\_{sort}\_page\_{page}.html

where:

{category\_name} = Category name

{sort} = Orderby

{page} = Page number

{categoryid} = Category ID

7. Click the **Generate catalog** button.

X-Cart generates the HTML catalog to the specified output folder. After the generation is completed, you return to the 'HTML catalog' section. At the top of the 'HTML catalog' dialog box a message is displayed that tells you where you can find the generated HTML catalog.

Once generated, the catalog can be left in the directory to which it was generated or copied to any web site (or multiple web sites).

## 5.7.2 Updating an Existing HTML Catalog

You should understand that your HTML catalog is just a set of static pages, so it will not include the changes you make to the store's database (like updating the details of a certain product, deleting or adding products, renaming a category, etc) until you regenerate it. To keep the information presented in your HTML catalog in sync with the information presented by the dynamic store you will have to update the HTML catalog regularly. Updating can be performed either by regenerating the entire catalog or by regenerating just the portion affected by the changes.

To update an existing HTML catalog:

1. Go to the 'HTML catalog' section (Administration menu->HTML catalog). A dialog box titled 'HTML catalog' opens.
2. Scroll down to the bottom of the 'HTML catalog' dialog box and find the subsection 'Generate catalogs for the following languages' in its lower part. Find the name of the language for which you would like to update the HTML catalog and type the catalog path (path to the directory where the existing HTML catalog is stored) into the input field provided next it.
3. Leave the check box 'Drop the old catalog before generating a new one' unselected.
4. Specify the portion of the HTML catalog that you wish to be updated:
  - a) Use the 'Category' drop-down box to select the category/categories in your HTML catalog that you wish to be updated.
    - If you wish to regenerate the entire HTML catalog, select *Root categories*.

- If you wish to regenerate just a portion of the HTML catalog, select the name of the category that contains this portion. (For example, if you deleted a product in the category 'Books' and are doing the update to exclude this product from your HTML catalog, select the category *Books* from the 'Category' drop-down box).
  - b) Use the check box 'Run through subcategories' to tell X-Cart whether you wish to update the subcategories of the selected category/categories in your HTML catalog or not.
  - c) Use the drop-down box 'Generate HTML pages for' to specify the type of pages that you wish to be updated (*Categories*, *Products* or *Categories and products*).
  - d) Use the check box 'Convert embedded static pages' to tell X-Cart whether you wish to update the embedded static pages in your HTML catalog.
5. Use the option 'Number of pages per one pass' to select the number of HTML catalog pages that you would like to be generated per one pass.
  6. Select a filename style for the pages of your HTML catalog.
  7. Click the **Generate catalog** button.

X-Cart updates the HTML catalog in the specified directory:

- If the filename of a generated page is identical to the filename of any page stored in this directory, the generated page overwrites the existing page.
- If the filename of a generated page does not coincide with any filename in this directory, the generated page is simply added to the catalog.

### 5.7.3 Rules for Defining Hyperlinks

It is natural that the pages of your X-Cart-based store can include links to other resources on the Web. To ensure that these links function correctly both in your dynamic store and in your static HTML catalog, when defining links, please take into account the following considerations:

- Outward links (links to other websites) must be absolute (for example, <http://www.google.com/index.html>).
- Links to documents located on the same site with your store can be either absolute or relative (whatever is more convenient to you), but in X-Cart versions before 4.1.8 relative links should be defined relatively *to your X-Cart web directory*. Although relative links defined in a different way may work fine in the dynamic store, they can cause you trouble if you decide to use the HTML catalog feature: in the process of generating an HTML catalog, all relative links located on the pages being converted to HTML are converted into absolute by being added to the store URL; in cases where links are defined in any way other than relatively to X-Cart's web directory they may be converted wrongly.

*Example:*

For example, your store URL is <http://www.example.com/xcart/>. In your store, you have pages "page1.html" and "top\_list.html" located in X-Cart root (<http://www.example.com/xcart/page1.html> and [http://www.example.com/xcart/top\\_list.html](http://www.example.com/xcart/top_list.html) respectively).

For example, you wish to insert a link pointing to the page "top\_list.html" into the page "page1.html".

You can define the link destination in any of the following ways:

- a) `http://www.example.com/xcart/top_list.html`
- b) `/xcart/top_list.html`
- c) `top_list.html`

Any of the above should work fine in your dynamic store.

However, if you generate an HTML catalog so that the page "page1.html" will be included into it, the links will be converted as follows:

- a) The link "`http://www.example.com/xcart/top_list.html`" will remain the same, which is fine.
- b) The link "`top_list.html`" will be converted to "`http://www.example.com/xcart/top_list.html`", which is fine.
- c) The link "`/xcart/top_list.html`" will be converted to "`http://www.example.com/xcart/xcart/top_list.html`" - which is wrong, as the path to `top_list.html` needs just one `/xcart` directory - the one corresponding to your X-Cart web directory.

The above limitation does not apply to X-Cart versions 4.1.8 and later: in these versions, links defined relatively to the site root can be converted correctly (The link "`/xcart/top_list.html`" will be converted to "`http://www.example.com/xcart/top_list.html`").

**Note:** if the templates contain tags such as `` links of the following type cannot be used: `` or ``. You must either specify full web path (as in ``) or just designate the name of the file (as in ``).



## 6 Customizing the Look and Feel

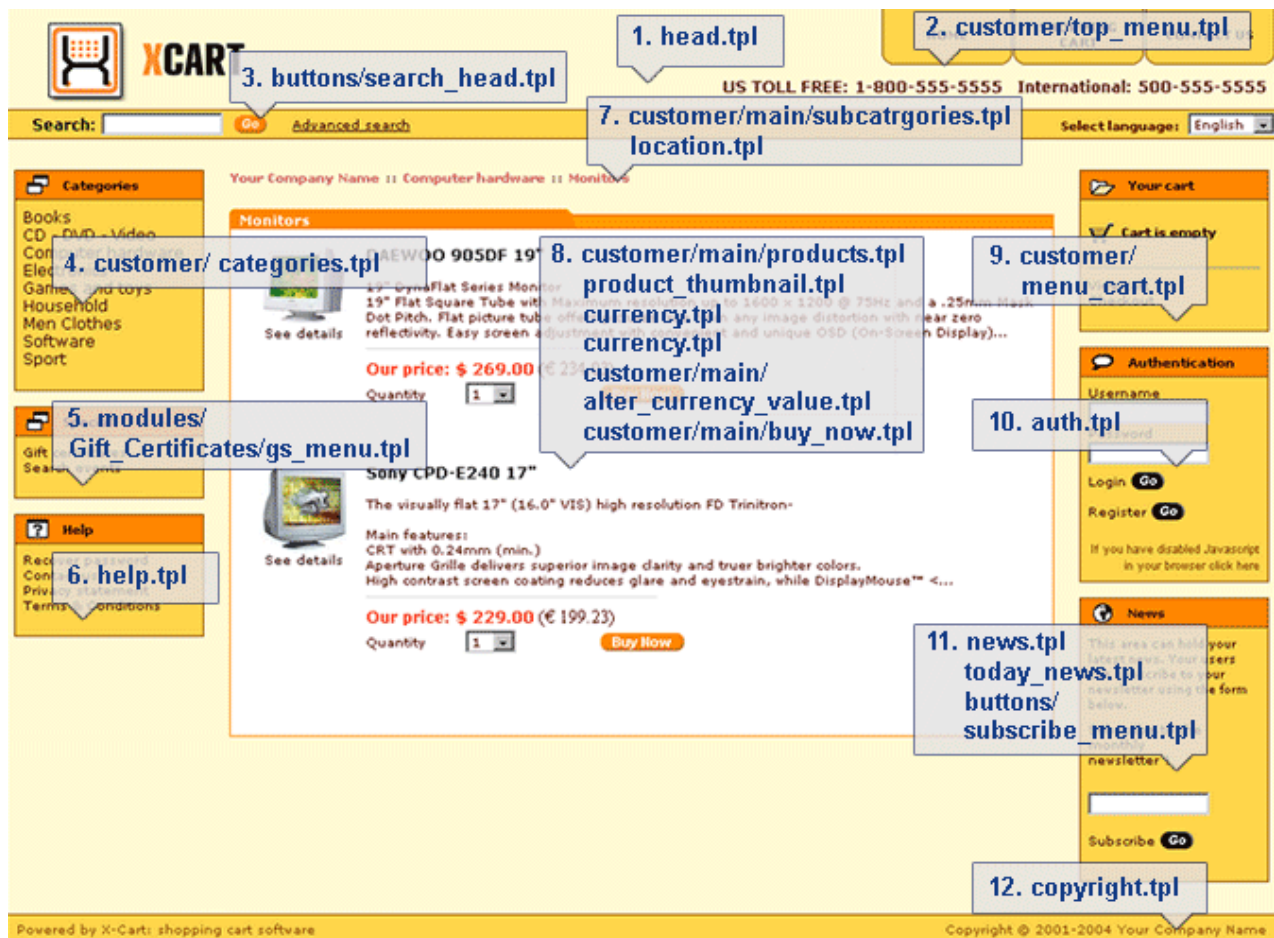
This section provides some basic information about ways to customize X-Cart's look and feel.

- Read the chapter [Editing Templates](#) for information on X-Cart's templates and ways to edit them.
- Study the chapter [Editing the Text of the User Interface](#) to find out how you can edit the text that appears in your store's interface.
- Refer to the chapter [Managing Languages](#) for instructions on how to add and manage languages in a multilingual store.
- See the chapter [Using Static Pages](#) to find out how you can add more pages to your X-Cart.
- Check out the chapter [Using the Speed Bar](#) to find out how you can create and manage a navigation bar providing quick access to certain pages of the Customer area.

### 6.1 Editing Templates

X-Cart's pages are generated of templates. To form a page, multiple templates are organized in a hierarchical structure where the top-level templates (admin/home.tpl, provider/home.tpl and customer/home.tpl) include templates lower in the hierarchy, which, in their turn, can also include templates, and so on. Each of the templates defines the look of a specific portion of the page.

For example, 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:



To modify a specific portion of the page, you need to modify the template responsible for displaying that area. X-Cart's Debugging Console allows you to find out the name of the template that needs to be modified and to quickly open it in X-Cart's built-in template editor (For details, see the chapter [Using X-Cart's Debugging Console](#)). The template editor allows you to edit any template in the store without leaving the store back-end (For details, see the chapter [Using X-Cart's Template Editor](#)).

Customization of X-Cart's templates requires at least basic knowledge of HTML, CSS and Smarty Template Engine. Here is a list of good online resources for HTML, CSS and Smarty:

#### HTML:

W3C HTML start page: <http://www.w3c.org/MarkUp/>

HTML Validation Service: <http://validator.w3.org/>

#### CSS:

W3C Cascading Style Sheets homepage: <http://www.w3.org/Style/CSS/>

Validation service: <http://jigsaw.w3.org/css-validator/>

#### Smarty:

The Smarty online documentation: <http://smarty.php.net/docs.php>



The Smarty resources: <http://smarty.php.net/resources.php>

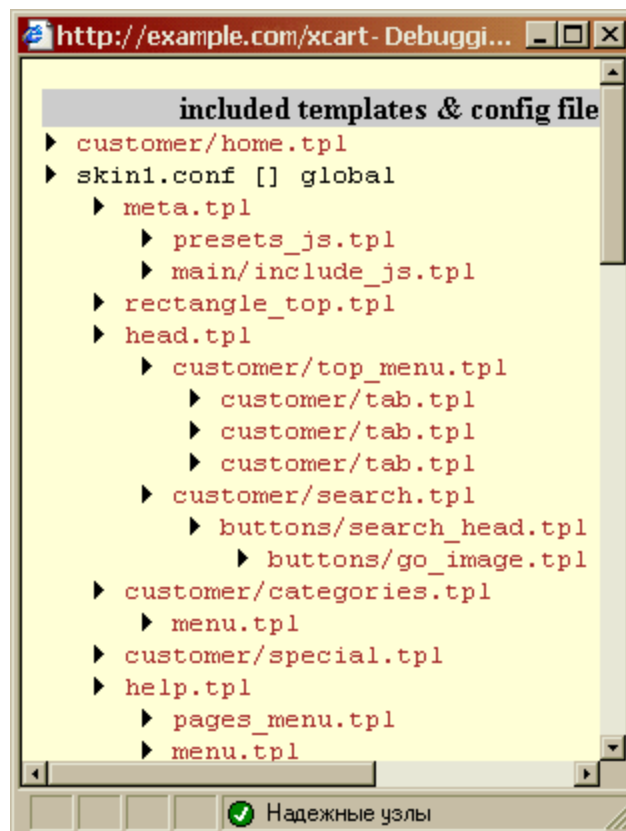
Please note that Professional Design & Design integration services can be ordered at [www.x-cart.com](http://www.x-cart.com).

## 6.1.1 Using X-Cart's Debugging Console

When working with templates, you may want to use X-Cart's Debugging console. It is a special tool that enables you to view the template structure of the page you are currently viewing.

X-Cart's Debugging console can be launched by enabling the option 'Enable debugging console' in General settings->General options. It is also enabled automatically when you start Webmaster mode.

The Debugging console is an additional window displaying the hierarchy of templates of the current page. For example, if you use the Debugging console to explore the template structure of the customer zone front page, the result may be something like this:



As you move about the store, the contents of the Debugging console window gets updated, so you can be sure the template hierarchy displayed in the Debugging console window is the template structure of the page you are viewing at the moment.

In Webmaster mode, X-Cart's Debugging console allows you not only to view the template structure of a page, but also to quickly access any of the templates involved in this structure: all you need to do is click on the name of the desired template, and it will be opened in X-Cart's template editor.

## 6.1.2 Using X-Cart's Template Editor

X-Cart provides a built-in template editor. This editor allows you to access and modify the templates from which your store is built.

To open a template in X-Cart's template editor:

- If you are using Webmaster Mode, locate the template using X-Cart's Debugging console and click on its name in the Debugging console window.

*or*

- Click on Edit templates in the Administration menu and use the section 'Browse templates' to locate the necessary template file. You can use either the preset files menu or the 'Browse templates' form to access the files you need.

### Preset files menu

- ▶ [Config file \(skin1.conf\)](#)
- ▶ [CSS file \(skin1.css\)](#)
- ▶ [Buttons](#)
- ▶ [Help files](#)
- ▶ [Error messages](#)
- ▶ [Mail templates](#)
- ▶ [Today's News](#)



-----  
break-----

---

**Create new file**

New file name:

---

**Create new directory**

New directory name:

---

**Copy selected file to...**

Copy file name:

---

**Upload file to the current directory**

Replace file if exists

**WARNING!** The maximum file size that can be uploaded: 2Mb.

If you wish to restore all templates from the repository click the button below.  
**WARNING: ALL CHANGES MADE TO ALL TEMPLATES WILL BE LOST**

If you do not need the multi-language templates you can perform compilation (i.e. automatically replacing language variables with the values). This would be very helpful in editing templates process.  
**Note:** compilation process could take several minutes, please be patient.

Language:

**Note:** If you wish to switch back to the multi-language templates, use "Restore All" function.

## Creating new files

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.

### Creating directories

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.

### Copying files

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.

### Deleting files and directories

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.

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

### Uploading files from a 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.

## Editing templates

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.

**Edit file**

/main

File: /main/orders.tpl

```
{* $Id: orders.tpl,v 1.38 2004/05/28 12:21:03 max Exp
$ *}
{include file="common_js.tpl"}

{include file="page_title.tpl"
title=$lng.lbl_orders_management}

{if $orders ne ""}
{if $usertype eq "A" or ($usertype eq "P" and
$active_modules.Simple_Mode)}
{$lng.txt_adm_search_orders_result_header}
{elseif $usertype eq "P"}
{$lng.txt_search_orders_header}
{elseif $usertype eq "C"}
{$lng.txt_search_orders_header}
{/if}
{else}
{$lng.txt_search_orders_header}
{/if}
<BR>

{if $mode ne "search" or $orders eq ""}

<BR><BR>

<SCRIPT type="text/javascript" language="JavaScript
1.2"><!--
function managedate(type, status) {ldelim}
```

**Save** **Cancel**

If you wish to preview this template save the file and click on the button below.

Use default stylesheet for template preview

**Preview**

If you wish to restore this template from the repository click on the button below.  
**Note:** all changes made to this template will be lost.

**Restore file**

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 '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.

**Important:** If you edit templates on your local machine and then upload them via FTP (and not using the Edit templates section), make sure you clear the templates cache, otherwise Smarty might not compile the templates correctly.

## Restoring all files

1. Click on Edit templates in the Administration menu, the 'Browse templates' form will appear.
2. Click on **Restore All**. All the templates will be restored.

## Compiling templates

If you do not need multiple languages at your store (if you wish to use only one language), and wish to make the process of template editing somewhat easier, you can compile your store's templates. Compilation is a process that automatically replaces language variables used in your store's templates with the values of these variables.

To compile your store's templates:

1. Go to the 'Browse templates' section of your store's back-end (Administration menu->Edit templates). You should see a dialog box titled 'Browse templates'.
2. Scroll down to the bottom of the page. At the bottom of the 'Browse templates' dialog box, you should see a button labeled **Compile templates** and a drop-down box labeled 'Language'. The 'Language' drop-down box contains a list of languages enabled at your store.
3. From the 'Language' drop-down box, select the language you wish to use in the compiled templates.
4. Click on **Compile templates**. Your store's templates will be compiled. Note that the compilation process may take up to several minutes.

**Warning:** If you choose to compile your store's templates, you will be able to edit any textual elements of your store's user interface through the template editor, but you will not be able to edit them using the Edit languages section (Administration menu->Languages) or Webmaster mode.

## 6.2 Editing the Text of the User 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 easily editable. Probably the best thing about it is that a user does not need to possess any programming skills to be able to edit text: the wording of any text piece in the store can be changed from the admin interface.

Easy access to text editing is possible due to the usage of *language variables*. A language variable is a named storage location that can contain textual data. X-Cart's template code and program code operate with language variable names, not with text pieces directly. Thus, text pieces contained in variables can be edited without changing the template or program code.

In fact, editing text in X-Cart boils down to editing language variable values. X-Cart allows you to edit language variable values using the 'Languages' section of the store's back-end (See [Managing X-Cart's Language Variables](#)) or using Webmaster mode (See [Using Webmaster Mode](#)).

### 6.2.1 Managing X-Cart's Language Variables

X-Cart's 'Languages' section allows you to edit the values of existing language variables, add new language variables and delete the language variables that you do not need in your store.

#### Selecting a language for editing

Before you can edit, add or delete language variables, you need to select a language in which the changes will take place.

To select a language for editing:

1. Go to the 'Languages' section of your store back-end (Administration menu->Languages).
2. Use the drop-down menu in the 'Edit language' dialog box to select the language that needs to be edited.



The image shows a screenshot of a web interface element titled "Edit language". It features a white background with an orange border and a matching orange header bar containing the text "Edit language". Below the header, the word "Language:" is followed by a standard web drop-down menu. The menu's text is "Select one..." and it has a small downward-pointing arrow on its right side.

The page will be refreshed to display all the tools needed for editing the variables of the selected language.



## Finding and viewing language variables

You should remember that every language is associated with a specific charset. To ensure that the variables of a language that you have opened for editing are displayed correctly, you need to view them in the language in which they were created. This means that, if the language selected for editing is Chinese, the current language of the administration interface needs to be switched to Chinese, too:



The number of language variables in X-Cart is extremely great, so, in order to view specific language variables, you will first need to find them. X-Cart's language variable filter facilitates finding language variables:



Here's how you can use the filter:

For your convenience, all the language variables in X-Cart are divided into several groups:

- Countries - names of countries in the language you are currently editing;
- E-Mail - text pieces used in email notification messages;
- Errors - error messages;
- Labels - relatively small text pieces (section titles, field names, etc);
- Languages - names of languages in the language you are currently editing;
- Modules - names and descriptions of modules for the 'Modules' section of the store back-end;
- Options - titles of subsections of the 'General settings' section of the store back-end and specific options;
- Text - longer text pieces (notes, comments, instructions, etc).

The filter allows you to narrow down your search by specifying a group of variables within which the search should be conducted and by entering a sequence of characters that should be used as a search string.

To find one or more language variables:

1. From the 'Select topic' drop-down box of the language variable filter, select the variable group where you wish the search to be conducted (or select *All* to search in all the groups).

The page will be refreshed displaying all the variables of the selected group in the 'Edit language entries' dialog box below the filter.

2. Into the 'Apply Filter' field, enter a phrase, word or partial word to be used as a search string (Please note that X-Cart will conduct the search both within variable names and within variable values).
3. Click the **Go** button.

The page will be refreshed again displaying only those variables that belong to the specified variable

group and match the search string.

## Editing language variables

To edit the value of a language variable:

1. Select a language for editing .
2. Make sure the options of the language being edited are adjusted properly:
  - a) If you have not yet done so, set the charset to be used for displaying the language by entering an appropriate charset code into the 'Charset' field of the 'Language options' subsection of the 'Edit language' dialog box. 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, replace the content of the 'Charset' field by its code.

The following resources provide information on charsets:

    - <http://en.wikipedia.org/wiki/Charset>
    - [http://en.wikipedia.org/wiki/ISO\\_8859](http://en.wikipedia.org/wiki/ISO_8859)
    - [http://en.wikipedia.org/wiki/ISO\\_8859-1](http://en.wikipedia.org/wiki/ISO_8859-1)
  - b) If necessary, select right-to-left direction for text using the appropriate check box.
  - c) Click the **Apply** button
3. Make sure the current language of the interface is the same as the language being edited (This is essential, because, when editing the values of variables in a certain language, you want to enter characters in the charset of that language).
4. Find the language variable that needs to be edited.
5. Edit the value of the language variable.
6. Click the **Update all** button.

## Adding language variables

To add a new variable:

1. Select a language for editing .
2. Make sure the options of the language being edited are adjusted properly.
3. Make sure the current language of the interface is the same as the language being edited (This is essential, because, when adding variables for a certain language, you want to enter characters in the charset of that language).
4. Scroll down to the 'Add new entry' section of the 'Edit language entries' dialog box.
5. Provide the details of the new variable:
  - a) 'Select topic' - Name of the variable group to which the variable needs to be added.

- b) 'Variable' - Name of the variable (in English).
  - c) 'Value' - Text piece to be stored in the variable (in the language being edited).
6. Click the **Add** button.

## Deleting language variables

To delete one or more language variables:

1. Select a language for editing and find the language variables that need to be removed.
2. Select the check boxes next to their names in the 'Edit language entries' dialog box.
3. Click the **Delete selected** button.

## 6.2.2 Using Webmaster Mode

Webmaster mode is an operating mode that facilitates WYSIWYG editing of language variable values directly from the pages on which they are displayed. In this mode, you can click on any text element in your store, and this action will open an editor in which you will be able to edit the text of the selected element. As soon as you save the changes made to the element, the results of editing will become available to all the users viewing the respective page of your store.

**Important:** Webmaster mode cannot be used in stores where a compilation of templates was done (For details on template compilation, see the chapter [Using X-Cart's Template Editor](#)).

### Starting Webmaster mode

To start Webmaster mode:

1. Go to the 'Webmaster mode' section of your store's administration back-end (Administration menu->Webmaster mode). You should see a box with instructions for using Webmaster mode. At the bottom of the box with instructions, you should see a button labeled **Start Webmaster mode**.

**Management**

- Users
- Categories
- Manufacturers
- Wish lists
- Products
- Orders
- News management
- Statistics
- Shipping methods
- Taxing system
- Edit ratings
- Countries
- States
- Benchmark
- Product classes
- Returns
- Gift certificates
- UPS OnLine® Tools
- Surveys

**Administration**

- Summary
- DB Backup/Restore
- Import/Export
- Membership Levels
- Credit card types
- Titles
- Edit templates
- Files
- General settings
- Images Location
- Languages
- Webmaster mode
- Modules
- Payment methods
- Patch/Upgrade
- HTML catalog
- Static pages

Main page :: Webmaster mode

## Webmaster mode

**Webmaster mode**

**Warning** Please ensure that pop-up windows are enabled in your browser (required for correct work of 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.

**Warning!** Webmaster mode will not work with compiled templates.

**Usage**

Go to the page you want to change. Additional "templates" window will appear with the list of all included templates. You can call the template editor from it by clicking on a template. 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, and (3) copy the label name into the clipboard (IE only).

More tips:

1. The language variables must be set in the language that is selected for your site as current;
2. Close any template windows & label windows before entering Webmaster mode again;
3. To quit Webmaster mode, go to admin zone, click on "Close Webmaster mode";
4. 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;
5. Use IE5 or later / NN6 or later to work in Webmaster mode.

To enter in Webmaster mode press the button below.

2. Click the **Start Webmaster mode** button. Webmaster mode will be enabled. You will know it by that all the textual elements of the user interface in your current user session will become green:

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**Management**

- Users
- Categories
- Manufacturers
- Wish lists
- Products
- Orders
- News management
- Statistics
- Shipping methods
- Taxing system
- Edit ratings
- Countries
- States
- Benchmark
- Product classes
- Returns
- Gift certificates
- UPS OnLine® Tools
- Surveys

**Administration**

- Summary
- DB Backup/Restore
- Import/Export
- Membership Levels
- Credit card types
- Titles
- Edit templates
- Files
- General settings

**Main page :: Webmaster mode**

**Webmaster mode**

You are now in Webmaster mode; it allows you to change any language label stored in the database directly from the pages it appears on.

[Open customer area in a new window](#)

To exit Webmaster mode press the button below.

Warning Please ensure that pop-up windows are enabled in your browser (required for correct work of Webmaster mode).

Webmaster mode facilitates the process of changing language variables (denoted as "\$ling.XXX" in templates) enabling you to change these values in WYSIWYG mode.

Warning! Webmaster mode will not work with compiled templates.

**Usage**

Go to the page you want to change. Additional "templates" window will appear with the list of all included templates. You can call the template editor from it by clicking on a template. 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, and (3) copy the label name into the clipboard (IE only).

This is normal: green color of text shows that Webmaster mode is on.

After enabling Webmaster mode, you will also see an additional pop-up window appear displaying the tree of templates of the current page. This is also normal: the pop-up window with the tree of templates is X-Cart's Debugging console which is automatically enabled by Webmaster mode; you can use it to quickly access any of the templates of the current page for editing (For detailed information on using the Debugging console, read the section [Using X-Cart's Debugging Console](#)).

**Note:** Webmaster mode affects only one user session - the one in which it has been enabled. This means that, while you are working in Webmaster mode, any other users working in the store at the same time with you see the store's pages as perfectly normal (*not green and without the Debugging console window*).

## Editing text in Webmaster mode

To edit text in Webmaster mode:

1. After enabling Webmaster mode, go to the page on which the text you wish to edit is located.
  - If the desired page is in the Admin zone, simply browse to it (the same way you would in the normal mode).
  - If the desired page is in the Customer zone, click on the link 'Open customer area in a new window' at the top of the box with instructions for using Webmaster mode (this opens the Customer zone in a new browser window or tab in the same session), then browse to the desired page. Note that you will need to log in using your customer account to edit the pages that are

accessible only to authorized customers (like wish list, orders history, etc).

- (In X-Cart PRO): If the desired page is in the Provider zone, open the Admin zone in a new browser window or tab in the same session, then go to that new window or tab, edit the URL in the browser address bar so it points to the Provider area and press ENTER. After the Provider area authorization page is loaded, log in as provider and browse to the desired page.
2. Ensure that the page you are going to edit is displayed in the language you wish to edit. For example, if the page is currently displayed in English, and you wish to leave all the English text on this page "as is" and just edit the Russian version of the page, switch the Language selector at the top right-hand corner of the page to *Russian* before you proceed.
  3. Point the mouse cursor at the text element the wording of which you wish to edit.

**Tip:** Notice that, as you position the mouse cursor over a non-clickable text element, the browser status bar displays the name of the language variable that stores the respective text piece and the name of the template file that references this language variable; similarly, when you position the mouse cursor over a hyperlink, the browser status bar displays the destination of the hyperlink.

4. Do one of the following:
  - (If the text element is a non-clickable piece of text) Click on the text element once with the right mouse button.
  - (If the text element is a hyperlink): Press the "e" button on your keyboard.

**Important:** As you press the "e" button, your computer must be set to type in the English language, otherwise it will simply not work.

As soon as you do one of the above, a small pop-up window appears displaying a language variable. This pop-up window titled 'Edit label' is where you can edit the language variable value:

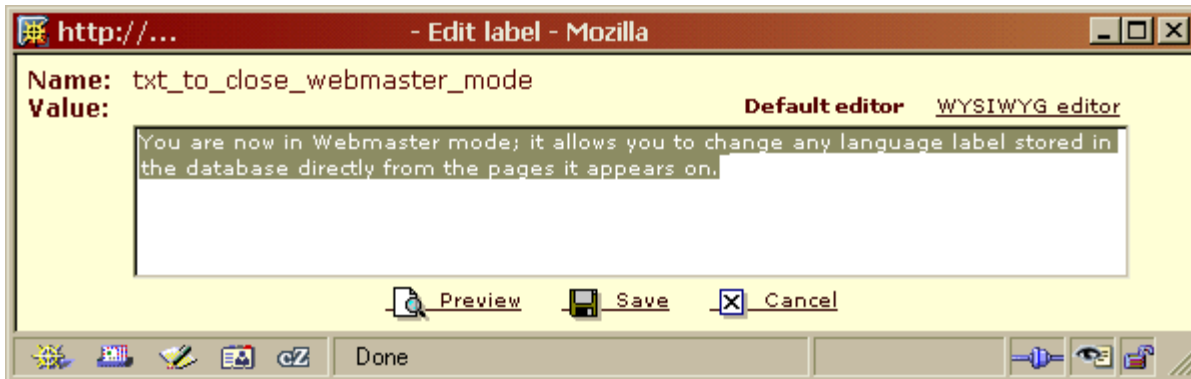


4. Edit the language variable value displayed in the 'Edit label' pop-up window and save the changes. For information on the 'Edit label' pop-up window, see the section [The 'Edit label' pop-up](#) below.

### The 'Edit label' pop-up

The 'Edit label' pop-up window is displayed after you select a text element in Webmaster mode. It displays the name of the language variable that stores the selected text element and provides a text area in which you can edit the value of that variable.

Note that, when HTML Editor module is enabled at your store, WYSIWYG editor is available for editing language variable values that are more than 40 characters in length or contain an EOL (end of line) symbol. In this case, above the text area with the variable value, you can see two links: 'Default editor' and 'WYSIWYG editor':



By clicking on the link 'WYSIWYG editor', you can switch to editing the variable value in WYSIWYG editor. If you do not like the WYSIWYG editor, you can switch back to using the Default editor at any moment by clicking on the 'Default editor' link.

For short and simple language variable values (less than 40 characters in length, not containing EOL symbols) only the Default editor is provided (In this case, you do not see any links above the text area).

Below the text area with the language variable value, there are three buttons: **Preview**, **Save** and **Cancel**.

The **Preview** button allows you to preview the page after making changes to the language variable value before you actually save the changes.

The **Save** button saves the changes you make to the language variable value.

The **Cancel** button allows you to discard any changes made to the language variable value before they are saved.

## Exiting Webmaster mode

To quit Webmaster mode:

1. Go to the 'Webmaster mode' section of your store's administration back-end (Administration menu->Webmaster mode).
2. Click the button **Close Webmaster mode**. Webmaster mode will be disabled. All textual elements should become their normal color.

**Note:** Quitting Webmaster mode does not automatically close the pop-up windows that were opened while you were working in Webmaster mode (The windows that might be open are the Edit label window and the Debugging console window). You need to

close any such windows manually. Before re-enabling Webmaster mode after it was closed, make sure you closed any pop-up windows that were left over from the previous Webmaster mode session.

## 6.3 Managing Languages

If you wish to use your X-Cart-based store to do business in a multicultural market, you will probably find useful X-Cart's ability to support multiple languages.

When your store has more than one languages installed and enabled, a Language selector is provided at the top of each page in each X-Cart zone. This selector is a simple drop-down box which may be labeled, depending on the zone in which it appears, 'Language' or 'Current language':



Contained in the Language selector drop-down box is a list of all languages currently enabled at the store. Store users use the Language selector to change the language of text in the interface they are using: as soon as the selector is switched to a different language, the language of the current interface changes to the selected language.

**Note:** A language change induced by switching the selector to a different language affects only one X-Cart zone and only within the user session in which the selector was switched.

Language selectors similar to the Language selector located at the top of the page are also provided in some dialog boxes in the store's administration back-end. The functionality of such selectors is identical to the functionality of the Language selector located at the top of the page - they switch the language of the entire X-Cart zone to the selected language.

Initially, X-Cart has only one language installed - English; however, you can add more languages, so your store's users can choose, in which language they wish to view the store pages and read email notifications. You may keep simultaneously installed as many languages as necessary.

You can add a new language to your store using any of the following methods:

1. By creating a copy of an existing language and translating it into the desired language (For instructions, read the chapter [Creating Languages](#))
2. By importing a ready-made language pack (a language file in CSV format) into your store (For instructions, read the chapter [Importing Languages](#)).

You export languages from your store to CSV format (See the chapter [Exporting Languages](#)).

In a store that supports more than one language, you need to define, what language(s) should be used by default for the storefront and for the back-end (For details, see the chapter [Setting Your Store's Default](#)



[Languages](#)).

Of course, you can disable and delete languages (See the chapters [Disabling languages](#) and [Deleting Languages](#)).

## 6.3.1 Creating Languages

You can add a new language to your store by creating a copy of an existing language and translating it into the desired language.

For example, if you have just one language at your store - English - and you wish to add another language - Russian - use one of the following methods:

*Method 1:*

First, create a copy of the English language and name it *Russian*:

1. Go to the 'Edit languages' section of the Admin zone (Administration menu->Languages).
2. Scroll down to the 'Add/Update language' dialog box:

**Add/Update language**

**Choose a language:** Select one...

**CSV delimiter:** Semicolon

**The source of import file:**

Server  
 Home computer

**CSV file is located on the server:**  
/home/user/public\_html/xcart/files/lng\_file.csv  
The file path specified here must be absolute, e.g.:  
/home/user/public\_html/xcart/files

**Note:** the fields in the file being imported must be in the following order: Name, Value, Description, Topic

**Add/Update language**

3. From the drop-down box 'Choose a language', select the name of the language that you wish to create (*Russian*).

**Note:** If the name for the desired language is not listed in the 'Choose a language' box, it means that currently there is no language variable for the name of this language. To continue, you will need to create such a variable:

- 1) Scroll up to the 'Edit language' dialog box.
- 2) From the 'Language' drop-down box, select the name of the language that you are going to use as a source for translation (*English*).
- 3) After an automatic page refresh, you should see a dialog box titled 'Edit language entries'. Scroll down to its bottom.

5) Use the 'Add new entry' subsection of the 'Edit language entries' dialog box to add a language variable that will be used for the name of the new language:

- a) From the 'Select topic' drop-down box, select *Languages*;
- b) Into the 'Variable' field, enter a name for the variable (Use the format "language\_[country\_code]");
- c) Into the 'Value' field, enter the name of the language that you wish to create.

Click the Add button to save the changes.

4. Click the **Add/Update language** button. X-Cart will create a copy of the English language named *Russian*.

The page will be refreshed automatically displaying the newly created language so you can edit it.

Now, translate the values of all the variables of the newly created language from English into Russian:

1. At the top of the page, you will see a dialog box titled 'Edit language'. Make sure the charset specified in the 'Edit language' form is correct. If not, enter the necessary charset code. For Russian, we will use the charset Windows-1251:

The screenshot shows a dialog box titled "Edit language" with an orange header. It contains the following elements:

- Language:** A dropdown menu showing "Russian", with "Disable" and "Delete" buttons to its right.
- CSV delimiter:** A dropdown menu showing "Semicolon", with an "Export" button to its right.
- Language options:** A section separated by a horizontal line, containing:
  - Charset:** A text input field containing "Windows-1251".
  - Right-to-left text direction
  - Apply** button

Click the **Apply** button to save the changes.

**Note:** if you select the 'Right-to-left text direction' option, be aware that in case your text labels contain any brackets, parentheses or other opening and closing symbols, they will be displayed incorrectly in most browsers due to browser limitations. Parentheses and square brackets, and some other characters, are displayed as mirror-images (i.e. reversed) when the text direction is right-to-left. This is because the characters have the semantics of open and close, not the graphically left and right. An open parenthesis or square bracket, in right-to-left text, is rendered as a mirror-image so that it visually encloses the text to its left. Similarly, closing parentheses and brackets are also mirror-imaged, so they face the text to their right. The workaround here is to not use such symbols in text labels or rewrite each label containing opening or closing symbols according to the logic of text representation, which browsers use.

2. Use the language selector at the top of the page to switch the current language of the Admin zone to the target language (in our example, Russian).
3. Enable your computer to type in the selected language (Russian).
4. Scroll down to the 'Edit language entries' dialog box:



Use the controls of this dialog box to replace all the English variable values by values in the Russian language. To find specific variables, you can use the language variable filter above the 'Edit language entries' dialog box.

Save the changes by clicking the **Update all** button at the bottom of the 'Edit language entries' dialog box.

Be sure to edit all the variables on all the pages.

5. Browse through your store with the Language selector switched to Russian to make sure that all the text elements of the Russian version of the user interface are displayed correctly.

#### *Method 2:*

Create a language pack for the Russian language:

1. Export the English language to a CSV file (For details, see the chapter [Exporting Languages](#)).
2. Open the file in your favorite spreadsheet editor (like MS Excel) and translate the values of all the language variables from English into Russian.
3. Save the file as CSV.

Now import the language pack into your store (For details, see the chapter [Importing Languages](#)).

## 6.3.2 Importing Languages

You can add a new language to your store by importing a ready-made language pack into it. A language pack is a CSV file that contains all the language variables for a certain language. We do not sell language packs, but sometimes our clients who have already had their own stores translated want to share their own

language packs. X-Cart community forum (<http://forum.x-cart.com>) provides a place where our clients can share their language packs with other X-Cart users. Before you decide to translate your store by yourself or hire a translator, be sure to check out the 'Internationalization and Localization' section of the community forum - there might be some language packs which other users might be willing to give away or sell.

To import a language pack:

1. Prepare a CSV file with the necessary language for import into X-Cart.
2. Go to the 'Edit languages' section of the Admin zone (Administration menu->Languages).
3. Scroll down to the 'Add/Update language' dialog box:

4. From the drop-down box 'Choose a language', select the name of the language that you wish to import.

**Note:** If the name for the desired language is not listed in the 'Choose a language' box, it means that currently there is no language variable for the name of this language. To continue, you will need to create such a variable:

- 1) Scroll up to the 'Edit language' dialog box.
- 2) From the 'Language' drop-down box, select the name of the language that you are going to use as a source for translation (*English*).
- 3) After an automatic page refresh, you should see a dialog box titled 'Edit language entries'. Scroll down to its bottom.
- 5) Use the 'Add new entry' subsection of the 'Edit language entries' dialog box to add a language variable that will be used for the name of the new language:
  - a) From the 'Select topic' drop-down box, select *Languages*;
  - b) Into the 'Variable' field, enter a name for the variable (Use the format "language\_*[country\_code]*");
  - c) Into the 'Value' field, enter the name of the language that you wish to create.

Click the Add button to save the changes.

5. Use the field 'CSV delimiter' to specify the type of delimiter used in the CSV file being imported.
6. Specify the location of the file that needs to be imported:
  - If the file is located on the server, select *Server* as the source of the import file and enter an absolute path to the file into the 'CSV file is located on the server' field.
  - If the file is located on your local computer, select *Home computer* as the source of the import file and use the **Browse** button to locate the file on your computer so its name and filepath appear in the 'CSV file for upload' field.
7. Click the **Add/Update language** button. The language will be imported.

**Note:** This method can also be used to update languages.

### 6.3.3 Exporting Languages

To export a language:

1. Go to the 'Edit languages' section of the Admin zone (Administration menu->Languages). At the top of the page, you should see a dialog box titled 'Edit language'.
2. From the 'Language' drop-down box of the 'Edit language' dialog box, select the language you wish to export.



The image shows a dialog box titled "Edit language" with an orange header. Inside the dialog, there is a label "Language:" followed by a drop-down menu. The drop-down menu currently displays "Select one..." and has a small downward-pointing arrow on its right side.

The page will be automatically refreshed. The 'Edit language' dialog box will be changed to include some options and controls for the selected language. For example, if you select the German language, the 'Edit language' dialog box will look as follows:

**Edit language**

Language: German [Disable] [Delete]

CSV delimiter: Semicolon [Export]

---

**Language options**

Charset: iso-8859-1

Right-to-left text direction

[Apply]

3. From the 'CSV delimiter' field, select the delimiter that you wish to be used for the resulting CSV file.
4. Click the **Export** button.

### 6.3.4 Setting Your Store's Default Languages

In a store that supports more than one language, you need to set two default languages - *default customer language* and *default admin language*.

Default customer language is a language in which the user interface appears by default to visitors of the Customer zone and (when X-Affiliate add-on module is used) of the Partner zone.

Default admin language is a language in which the user interface appears by default to users of the Admin zone and (in X-Cart PRO) of the Provider zone. It is also the language used for all email notifications to the Orders department.

A visitor continues to see the user interface in the default language until he or she chooses to switch the interface to a different language. For anonymous users, the information about the language that was selected is not stored between user sessions. For registered users, information about the selected language is stored in a cookie in the user's web browser; this way, when the user logs in to his or her account, the language of the user interface is automatically switched to the user's preferred language.

To set the default admin/customer languages:

1. Go to the 'Edit languages' section of the Admin zone (Administration menu->Languages). On the page, find the dialog box titled 'Default languages':



2. In the 'Default languages' dialog box:

- from the 'Default customer language' drop-down box, select the default customer language (for customers and partners).
- from the 'Default admin language' drop-down box, select the default admin language (for administrators and providers).

3. Click the **Update** button.

## 6.3.5 Disabling Languages

It is possible to temporarily disable languages. When a language is disabled, users cannot select it from the Language selector.

To disable a language:

1. Go to the 'Edit languages' section of the Admin zone (Administration menu->Languages). At the top of the page, you should see a dialog box titled 'Edit language'.
2. From the 'Language' drop-down box of the 'Edit language' dialog box, select the language you wish to disable.



The page will be automatically refreshed. The 'Edit language' dialog box will be changed to include some options and controls for the selected language. For example, if you select the German language, the 'Edit language' dialog box will look as follows:

**Edit language**

Language: German [Disable] [Delete]

CSV delimiter: Semicolon [Export]

---

Charset: iso-8859-1

Right-to-left text direction

[Apply]

3. Click the **Disable** button next to the 'Language' field. The button should turn to **Enable** to show that the selected language has been disabled.

To re-enable a disabled language:

1. From the 'Language' drop-down box of the 'Edit language' dialog box, select the disabled language that needs to be re-enabled.
2. Click the **Enable** button next to the 'Language' field. The button should turn to **Disable** to show that the selected language has been enabled.

**Note:** Please be aware that at least one language should be enabled in your store at all times. Do not disable a language if it is the last one available. Disabling the last language will result in destruction of the store.

## 6.3.6 Deleting Languages

You can permanently delete languages that you do not need.

To delete a language:

1. Go to the 'Edit languages' section of the Admin zone (Administration menu->Languages). At the top of the page, you should see a dialog box titled 'Edit language'.
2. From the 'Language' drop-down box of the 'Edit language' dialog box, select the language you wish to delete.

**Edit language**

Language: Select one... [v]

The page will be automatically refreshed. The 'Edit language' dialog box will be changed to include



some options and controls for the selected language. For example, if you select the German language, the 'Edit language' dialog box will look as follows:

3. Click the **Delete** button next to the 'Language' field. A warning will be displayed asking if you are sure you wish to delete the selected language.
4. Confirm your intention to delete the language. The language should be deleted. You should see an Information box with a confirmation message.

**Note:** Please be aware that at least one language should be enabled in your store at all times. Do not delete a language if it is the last one available. Deleting the last language will result in destruction of the store.

## 6.4 Using Static Pages

You can add static pages to your store to include additional information which does not fit into the standard X-Cart's page set.

X-Cart allows you to create static pages of two types:

- Embedded;
- Root.

Root level pages are fully independent HTML files. They exist in X-Cart root (the directory where your X-Cart store is installed), hence the name. Root pages do not depend on the rest of X-Cart pages, so they must be full HTML-files (must include tags like <HTML>...</HTML>).

Embedded pages are pages that are placed inside standard X-Cart pages. Their look depends on the design of your store in general, as you create only the page content. The content of embedded pages is displayed in your store's Information column (corresponds to the widest column in any X-Cart's standard

template scheme). Links to embedded pages appear in the 'Help' menu box. Embedded pages do not use tags like <HTML>, <HEAD>, <BODY>.

Root level pages are stored in the directory /xcart (X-Cart root), embedded pages - in subdirectories of the directory /xcart/skin1/pages, where the subdirectories are named after the respective languages (for example, pages for the English language are stored in the directory /xcart/skin1/pages/US, pages for the German language - in the directory /xcart/skin1/pages/DE, etc).

Two root level pages - index.html and shop\_closed.html are defined by default.

Information on how you can add static pages is available in the chapter [Adding Static Pages](#).

Information on how you can manage existing static pages is available in the chapter [Managing Static Pages](#).

## 6.4.1 Adding Static Pages

To add a new static page:

1. Go to the 'Static pages' section of your store's administration back-end (Administration menu->Static pages). A dialog box 'Static pages' opens.

### Static pages

---

#### Embedded level

POS.	PAGE TITLE	STATUS
No embedded pages defined		

[Add new...](#)

---

#### Root level

[Check all](#) / [Uncheck all](#)

	POS.	PAGE TITLE	
<input type="checkbox"/>	10	<a href="#">index.html</a>	<a href="#">Preview</a>
<input type="checkbox"/>	20	<a href="#">shop_closed.html</a>	<a href="#">Preview</a>

[Delete selected](#)   [Update](#)

[Add new...](#)

[Find pages](#)

2. (If your store supports more than one language) Use the Language selector at the top of the 'Static pages' dialog box to select a language in which you would like to add a static page.
3. Click the **Add new...** button in the subsection 'Embedded level' to add an embedded page, in the subsection 'Root level' - to add a root level page. A dialog box titled 'Static page details' opens.
4. Complete the fields of the 'Static page details' dialog box.

**Static page details**
[Pages list](#) **Go**

Level: Root

Page file: /u/svowl/public\_html/eshop\_dohtur/index.html

Page name: \*

Page content: \* 

```
<HTML>
<HEAD>
<TITLE>Welcome to X-Cart store!
</TITLE>
</HEAD>
<BODY leftmargin="0" topmargin="0"
rightmargin="0" bottommargin="0"
marginwidth="0" marginheight="0"
style="FONT-FAMILY: Verdana, Arial,
Helvetica, Sans-serif; COLOR:
#550000; FONT-SIZE: 12px; MARGIN-
TOP: 0 px; MARGIN-BOTTOM: 0 px;
MARGIN-LEFT: 0 px; MARGIN-RIGHT: 0
px; BACKGROUND-COLOR: #FFFBD3;">
<TABLE border="0" width="100%"
cellpadding="0" cellspacing="0"
align="center">
<TR>
<TD style="BACKGROUND-COLOR:
#FF8600;">&nbsp;  </TD>
```

Status: \*

Position:

**Note:** Since X-Cart version 4.0.2, static pages may use the <SCRIPT> tag.

5. Click the **Save** button to save the changes. The page will be created. You should see a confirmation message in an Information box. (To view the list of your store's static pages, you can click the link [Pages list](#) in the top right-hand corner of the 'Static page details' dialog box).

If your store supports more than one language, you will probably need to create the same static pages in each of the supported languages. To ensure that static pages existing in different languages use the same filename, create pages as follows:

1. Select the language in which the static page exists as current for the Admin zone (Use the 'Current language' selector).
2. Open the 'Static pages' dialog box.
3. Find the page that needs to be translated into another language and click on its title. The 'Static page details' dialog box opens displaying the details of the page you selected.
4. Use the 'Current language' selector to select the language into which you are going to translate the page as the current language for the Admin zone.
5. In the 'Static page details' dialog box, provide the necessary details for the page (title and content

of the page in the selected language, availability status and position number for the page displayed in the selected language).

6. Click the **Save** button to save the changes.

## 6.4.2 Managing Static Pages

Your store's embedded and root level static pages can be managed using the controls of the 'Static pages' dialog box.

To find all your store's static pages for a certain language:

1. Select the desired language as current.
2. Click the **Find pages** button. The 'Static pages' dialog box will provide a list of all the root level static pages that it will be able to find in the directory /xcart and all the embedded pages that it will be able to find in the directory /xcart/skin1/pages/<current\_language> (where <current\_language> is a two-letter code of the language currently selected in the 'Current language' box at the top of the page).

To preview a page:

1. Select the language of the page as current.
2. Find the page in the 'Static pages' list and click the Preview link opposite the page title.

To change the order in which static page links appear in the 'Help' menu box in a certain language:

1. Select the desired language as current.
2. Readjust the page position numbers in the POS. column of the 'Static pages' list.
3. Click the **Update** button.

To change the availability status of an embedded page for a certain language:

1. Select the desired language as current.
2. Find the page whose status needs to be changed in the 'Static pages' list and select the appropriate status - *Enabled* or *Disabled* - from the STATUS drop-down box opposite its title.
3. Click the **Update** button.

To edit the details of a static page (name, content, etc):

1. Select the language of the page as current.
2. Find the page in the 'Static pages' list and click on its title.
3. In the 'Static page details' dialog box, edit the necessary details.
4. Click on **Save**.

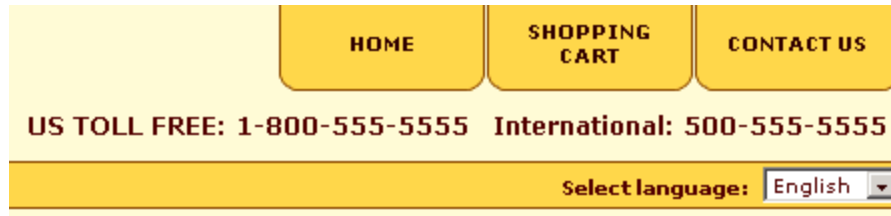
To delete a static page in a certain language:

1. Select the language of the page as current.

2. Find the page that needs to be deleted in the 'Static pages' list and select the check box next to its title.
3. Click on **Delete selected**.

## 6.5 Using the Speed Bar

You can provide your customers with the ability to quickly access certain pages of your store using the *speed bar*. The speed bar is a configurable set of shortcuts facilitating site navigation. It can be seen at the top right-hand corner of any page in the Customer area. It appears as a set of tabs with links to the most important pages of your store.



Information on how you can add links to the speed bar is available in the chapter [Adding Links to the Speed Bar](#).

Information on how you can manage the speed bar links is provided in the chapter [Managing the Speed Bar Links](#).

### 6.5.1 Adding Links to the Speed Bar

You can define what links should be in the speed bar of your store.

To add a link to the speed bar:

1. Go to the 'Speed Bar Management' section (Administration menu->Speed bar). A dialog box titled 'Speed Bar Management' opens.

Speed Bar Management

Language: English

POS.	LINK TITLE	URL	ACTIVE
10	Home	home.php	<input checked="" type="checkbox"/>
20	Shopping Cart	cart.php	<input checked="" type="checkbox"/>
30	Contact Us	help.php?section=contactus&mode=updat	<input checked="" type="checkbox"/>

**Add Link**

Add/Update

- (If your store supports more than one language) From the Language selector at the top right-hand corner of the 'Speed Bar Management' dialog box, select the language in which you are going to create the link.
- In the 'Add Link' subsection of the 'Speed Bar Management' dialog box, enter information about the shortcut that needs to be created:
  - POS.: Position of the speed bar tab that will contain the link.
  - LINK TITLE: Name of the shortcut (Text of the link that will be displayed on the speed bar tab).
  - URL: URL of the page that should be the destination of the link.
  - ACTIVE: Availability status of the link (When the check box in the ACTIVE column is selected, a tab with the link is displayed in the speed bar; when unselected, the tab is disabled).
- Click the **Add/Update** button.

If your store supports more than one language, you will probably need to create a name for the created shortcut in each of the supported languages. For each of the languages, do the following:

- From the Language selector at the top right-hand corner of the 'Speed Bar Management' dialog box, select the language in which you wish to create a name for the shortcut.
- In the list of shortcuts, find the shortcut whose name you wish to translate and replace its name in the LINK TITLE field by the desired name in the selected language.
- Click the **Add/Update** button.

To make sure that the shortcut name has been created correctly for each of the supported languages, switch the interface successively into each of the languages - the contents of the LINK TITLE field should be different.

## 6.5.2 Managing the Speed Bar Links

To rename a speed bar link:

1. In the 'Speed Bar Management' dialog box, find the link that needs to be renamed.
2. Use the Language selector to select the language in which the name needs to be edited.
3. Replace the contents of the LINK TITLE field with the new name in the selected language.
4. Click the **Add/Update** button.

To edit the destination of a speed bar link:

5. In the 'Speed Bar Management' dialog box, find the link the destination of which needs to be edited.
6. Change the destination page URL for this link in the URL column.
7. Click the **Add/Update** button.

To change the order of links in the speed bar:

1. In the POS. column of the 'Speed Bar Management' dialog box, edit the position numbers of the links that need to be rearranged.
2. Click the **Add/Update** button.

To disable a speed bar link:

8. In the 'Speed Bar Management' dialog box, find the link that needs to be disabled.
9. Unselect the checkbox in the ACTIVE column opposite this link.
10. Click the **Add/Update** button.

To delete a link from the speed bar:

1. In the 'Speed Bar Management' dialog box, find the link that you wish to delete.
2. Click the **Delete** button next to it.



# 7 Maintaining Your Store

This section provides information on tasks associated with maintaining an X-Cart-based store and tools which can help you perform these tasks.

See:

- [Summary Page](#)
- [Tools](#)
- [System Fingerprints](#)
- [Logs](#)
- [File Management](#)
- [Images Location Management](#)
- [DB Backup/Restore](#)
- [Upgrading X-Cart](#)
- [Applying Patches](#)

## 7.1 Summary Page

'Summary' page allows you to find out general information about your store, as well as information about any inconsistencies in the store configuration. You can use the links on this page to quickly access the sections of your store where the corresponding settings can be changed.

*If you are an X-Cart GOLD administrator/provider or an X-Cart PRO administrator.* You can access the 'Summary' page by clicking on Summary in the Administration menu.

The following information is available to you:

- Your Auth code (a key code that is used to prevent unauthorized access to X-Cart's installation script `install.php`; must be entered during installation if you decide to completely re-install X-Cart, change your store's skin set or install some X-Cart add-ons).
- License info:
  - copyright information,
  - link to the text of X-Cart License Agreement,
  - license verification link.
- General info:
  - Single mode status (enabled/disabled),
  - current status of your online store (enabled - open to visitors; disabled - temporarily closed),
  - information on database backup,

- information on the number of products which have a zero price (if any),

**Note:** a product has a zero price if:

1. it is a regular, non-configurable product;
2. it has a zero regular price or the default product variant has a zero price.

- orders info (number of processed, failed/declined, not finished and queued orders for a certain time period),
- shipping methods info (list of carriers and number of corresponding shipping methods enabled),
- shipping rates info (list of carriers and number of corresponding shipping rates defined; status of real-time shipping rates calculation: enabled/disabled).
- Payment methods info (results of checking, whether the environment requirements are met for payment methods).
- Environment info:
  - X-Cart version,
  - X-Cart directory,
  - PHP,
  - MySQL server,
  - MySQL client,
  - Web server,
  - Operating system,
  - Perl,
  - XML parser (expat),
  - HTTPS modules,
  - Modules for the payment methods,
  - List of directories which must have write permissions and their statuses.

*If you are an X-Cart PRO provider:* You can access the 'Summary' page by clicking on Summary in the Inventory menu.

The following information is available to you:

- General info:
  - information on the number of products which have zero prices,

**Note:** a product has a zero price if:

1. it is a regular, non-configurable product;
2. it has a zero regular price or the default product variant has a zero price.

- taxes info (list of taxes and number of tax rates defined),
- orders info (number of processed, failed/declined, not finished and queued orders for a certain time period),
- shipping rates info (list of carriers and number of corresponding shipping rates defined; list of destination zones and number of corresponding shipping rates defined; status of real-time shipping

rates calculation: enabled/disabled).

## 7.2 Tools

'Tools' section allows you to perform a variety of tasks directed towards increasing the overall performance of your store, clearing unnecessary data, etc.

To access 'Tools' section:

1. Go to the 'Summary' section of the store administration back-end (Administration menu->Summary).
2. In the 'Summary' section menu, click the link Tools.

To avoid loss of important data, make sure you clearly understand what you are doing before you perform any actions in 'Tools' section.

### Credit card information removal

Select the necessary options and click **Apply**:

**Credit card information removal**

- Remove from customers' profiles
- Remove from completed and processed orders
- Save the last 4 digits of credit card numbers in order details

**Apply**

**Note:** Please be careful when removing credit card information, this operation is irreversible. Credit card data will be removed only from processed and completed orders.

### Optimize tables

This tool allows you to optimize the structure of data stored in your MySQL database by reindexing the database tables. It is the right tool to use after any UPDATE, INSERT or DELETE activity performed bypassing X-Cart interface which you think might cause your indexes to become less well organized. Data and indexes becoming fragmented not only result in inefficient use of space, but cause SELECT queries used for data retrieval take longer to complete, which considerably slows down your shopping cart application. Table optimization should help you improve the overall performance of your store.

### Check database integrity

This tool allows you to improve the consistency and quality of data structures in your MySQL database.

The database used by your store is designed in such a way that your data is stored there in multiple tables. The way X-Cart shopping cart application works requires that in some cases the data from two or more tables should be combined. In such cases MySQL binds the data together across tables. For example, product titles are stored in one table, product prices - in another one; as each product in the store is supposed to have a price, MySQL associates each of the product title fields in the former table with a price field in the latter. If, while making alterations to your database tables, you fail to consistently change all the related data (for example, if you add a new product, but fail to add a price for that product), MySQL will not be able to join the respective tables and perform the selection of data from them properly. Checking database integrity should help you detect any flaws and inconsistencies which may appear as a result of alterations to the database design caused by maintenance or new inclusions to the database structures performed by bypassing X-Cart interface.

### **Force cache generation**

This tool allows you to force (re)generation of cache files and quick tables. In situations where X-Cart needs the same data set to be retrieved relatively often, you can have this data set cached (saved in a cache file or a quick table) so that X-Cart can receive it from there rather than by having MySQL select the necessary data by running the same queries on the same data set each time. Sparing MySQL the necessity of running through the data over and over, cache files and quick tables considerably reduce the load on your MySQL server.

This functionality is most useful after an import procedure, or after the store admin has modified the database or some files manually, or you suspect that some data may have been calculated incorrectly due to an interrupted procedure.

### **Statistics clearing**

This tool allows you to clear some or all of the types of statistical data gathered by your store since the store installation or the last statistics clearing, whichever is the later. Clearing your store statistics permanently removes the respective data from the database, so please be careful while selecting the type(s) of data to be removed.

**Note:** Please be careful when clearing statistics, this operation is irreversible.

### **Clear templates cache**

To remove precompiled smarty templates and free some disk space, click on **Clear** button.

### **Re-generating the Blowfish encryption key**

This operation will generate a new Blowfish encryption key and replace your current Blowfish key with it. To successfully perform this operation, you first need to set write permissions for the file config.php (This

file stores your Blowfish key). To set the required write permissions, issue the command: `chmod 666 config.php`

After your Blowfish key is re-generated, all the data that is supposed to be encrypted by Blowfish will be re-encrypted with the new key. Allow several minutes for the procedure to be completed. Please be patient and wait until the end of the re-encryption procedure, otherwise the data that has not been re-encrypted with the new Blowfish key will be lost.

### **WARNING! BACKUP YOUR X-CART BEFORE YOU PROCEED!**

It is strongly recommended to backup all the files and the database of your store before trying to re-generate the Blowfish key. Failure during the procedure of re-generating the Blowfish key can negatively affect your ability to log into the store and will result in loss of important information, including customer data and order details.

### **Remove data**

This tool allows you to empty your store of any content data with which it might have been populated for testing purposes. Clicking the button removes all the settings related to products, categories, manufacturers and shipping rates, as well as any data that has been formed based on these settings (for example, orders). The tool can help you bring your X-Cart installation to a state where the store will get rid of all unnecessary data, retaining the configuration settings defining how it should function.

## **7.3 System Fingerprints**

X-Cart uses MD5 (Message-Digest algorithm 5) for data integrity control. It provides a tool which allows you to create lists of MD5 checksums of all the files in X-Cart installation directory and to compare checksum lists generated at different periods of time to verify the integrity of X-Cart files.

In X-Cart, a list of MD5 checksums of all the files in the system is called a *system fingerprint*. The first system fingerprint in your store is generated automatically at the time of X-Cart installation ([Step 9: Generating a system fingerprint](#)). This system fingerprint reflects the original unmodified state of the system. Later, you can get X-Cart to generate more system fingerprints.

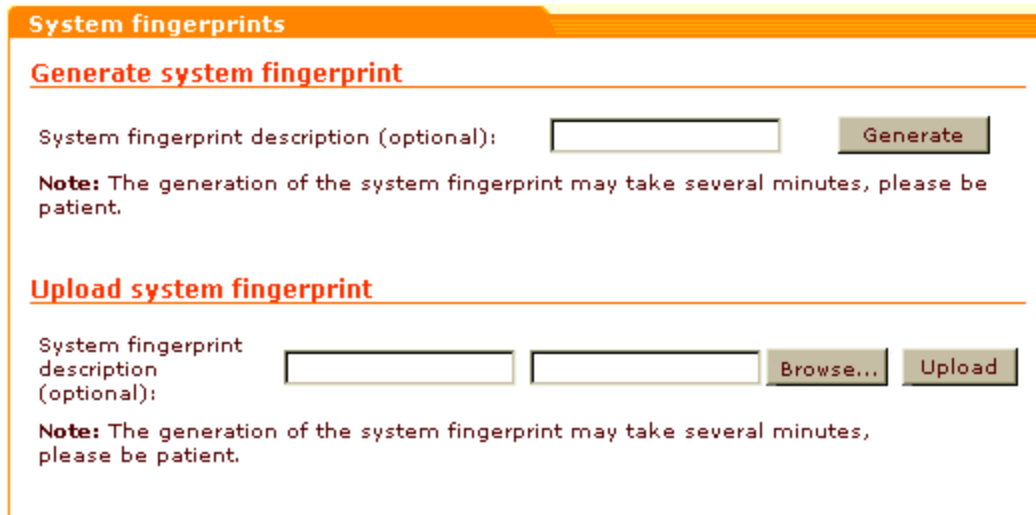
Any system fingerprint can be compared with the current state of the store or with any other fingerprint. Comparing fingerprints allows X-Cart to detect any changes in /xcart directory. As a result of comparing fingerprints, you get a list of files which have been modified, added or lost (removed from the system or renamed so they cannot be identified).

### **Generating system fingerprints**

To get X-Cart to generate a system fingerprint:

1. Open the 'System fingerprints' section of X-Cart administration back-end:
  - a) Go to the 'Summary' section (Administration menu->Summary).
  - b) In the 'Summary' section menu, click the link System fingerprints.

You should see a dialog box titled 'System fingerprints':



**System fingerprints**

**Generate system fingerprint**

System fingerprint description (optional):

**Note:** The generation of the system fingerprint may take several minutes, please be patient.

**Upload system fingerprint**

System fingerprint description (optional):

**Note:** The generation of the system fingerprint may take several minutes, please be patient.

2. (Optional) In the 'Generate system fingerprint' subsection of the 'System fingerprints' dialog box, enter a description for the system fingerprint you are going to create.
3. Click the **Generate** button. X-Cart should launch the generation of the fingerprint. The process may take as long as several minutes. As soon as the fingerprint gets generated, you should see an Information box with a confirmation message.

The fingerprint should be added to the list of available system fingerprints:

### System fingerprints

The following system fingerprints are currently available:

[Check all](#) / [Uncheck all](#)

DATE	SYSTEM FINGERPRINT	DELETE
08-12-2005 13:41:41	Fingerprint_8Dec2005	<input type="checkbox"/>

Generate system fingerprint

System fingerprint description (optional):

**Note:** The generation of the system fingerprint may take several minutes, please be patient.

Upload system fingerprint

System fingerprint description (optional):

**Note:** The generation of the system fingerprint may take several minutes, please be patient.

## Deleting system fingerprints

System fingerprints which you no longer need can be deleted directly from the 'System fingerprints' section of X-Cart administration back-end.

To delete a system fingerprint:

1. Open the 'System fingerprints' section of X-Cart administration back-end:
  - a) Go to the 'Summary' section (Administration menu->Summary).
  - b) In the 'Summary' section menu, click the link System fingerprints.You should see a list of available system fingerprints in the 'System fingerprints' dialog box.
2. Select the DELETE check boxes opposite the system fingerprints that you wish to delete.
3. Click the **Delete selected** button below the list. The selected fingerprints should be removed. You should see an Information box with a confirmation message.

## Uploading system fingerprints

X-Cart saves generated system fingerprints to the directory `/xcart/var/log` (a system fingerprint file name looks something like `md5_1139908092log.php`). If you do not wish to permanently keep system fingerprints in the directory `/xcart/var/log`, but wish to be able to use them in the future, you may want to move your fingerprint files to some place else - for example, you can download them to your local computer. Later, when you need to compare a downloaded system fingerprint with the current state of your store or with another system fingerprint, you will only need to upload this system fingerprint back onto X-Cart server so it becomes available in the directory `/xcart/var/log`. This can be done directly from the 'System fingerprints' section of X-Cart administration back-end.

To upload a system fingerprint to the directory `/xcart/var/log`:

1. Open the 'System fingerprints' section of X-Cart administration back-end:
  - a) Go to the 'Summary' section (Administration menu->Summary).
  - b) In the 'Summary' section menu, click the link System fingerprints.  
You should see a dialog box titled 'System fingerprints'.
2. Scroll down to the 'Upload system fingerprint' subsection of the 'System fingerprints' dialog box.
3. (*Optional*) Use the 'System fingerprint description' field in this subsection to enter a description for the system fingerprint you are going to upload.
4. Click the **Browse** button and use the 'File Upload' window to locate the necessary system fingerprint file. Select the file.
5. When the file name of the selected fingerprint appears in the appropriate field in the 'System fingerprints' dialog box, click the **Upload** button. The fingerprint file should be uploaded to the directory `/xcart/var/log`.

As soon as the uploaded fingerprint appears in the list of available fingerprints in the 'System fingerprints' dialog box, you can use it as any other system fingerprint stored in the directory `/xcart/var/log`.

## Comparing system fingerprints

At any moment, you can compare any existing system fingerprint with the current state of your store. If you have more than one system fingerprints, you can also compare them with one another.

To compare fingerprints:

1. Open the 'System fingerprints' section of X-Cart administration back-end:
  - a) Go to the 'Summary' section (Administration menu->Summary).



- b) In the 'Summary' section menu, click the link System fingerprints.
2. In the 'System fingerprints' section menu, click the link Compare system fingerprints. You should see a dialog box titled 'Compare system fingerprints':

**Note:** The subsection allowing you to compare two fingerprints may not be present on your screen, as you need to have at least two system fingerprints in `/xcart/var/log` to be able to access this function.

3. Select whether you wish to compare the current status with a system fingerprint or to compare two system fingerprints (select the appropriate radio button).
4. Use the 'System fingerprint' drop-down box(es) to select the system fingerprint(s) that will be used for comparing.
5. Select a file range that you wish to be displayed in the comparison results:
  - *Templates only / PHP scripts only / All files;*
  - *Changed files / New files / Missing files / Unreadable files.*
6. Click the **Compare** button.

X-Cart should perform the comparison and output the results in the 'Comparison results' form below.

## 7.4 Logs

X-Cart logs are stored in the directory /xcart/var/log. 'Logs' section of your X-Cart-based store back-end allows you to view and manage X-Cart logs using the store interface.

To access 'Logs' section:

1. Go to the 'Summary' section of the store administration back-end (Administration menu->Summary).
2. In the 'Summary' section menu, click the link Logs.

**View shop logs**

**Date period:**  All dates  This month  This week  Today  
 Specify the period below

**Log date from:** December 08 2005

**Log date through:** December 08 2005

**Include logs:**

- Database operations
- File operations
- Order-related operations
- Product-related operations
- Errors in receiving realtime shipping rates
- Online payment processing errors
- PHP errors
- SQL errors
- Environment changes
- Debug messages

**View N latest records:** 5  
Enter "0" (zero) to view all records

3. Select the date period for which you wish to view the log files. Select one of the preset options or the specify an exact period.
4. Select the check boxes next to the kinds of operations you want to log.
5. Enter the number of records of each kind of operations or errors you want to view. Enter "0" (zero) to view all records.

6. Click **Search**. The results will be displayed in the 'Search results' section below.

7. Click **Clean selected logs** to remove the selected information from the corresponding log files.

## 7.5 File Management

If you sell downloadable products (like software or e-books) or just think it convenient to store some files on the server within the bounds of your X-Cart store, you might be interested to know that X-Cart provides a special directory where you can store various files and a file manager that allows you to manage the contents of this directory.

*If you are an X-Cart GOLD administrator/provider or an X-Cart PRO administrator:*

- your files directory is `/xcart/files`;
- you can access the file manager by clicking on Files in the Administration menu.

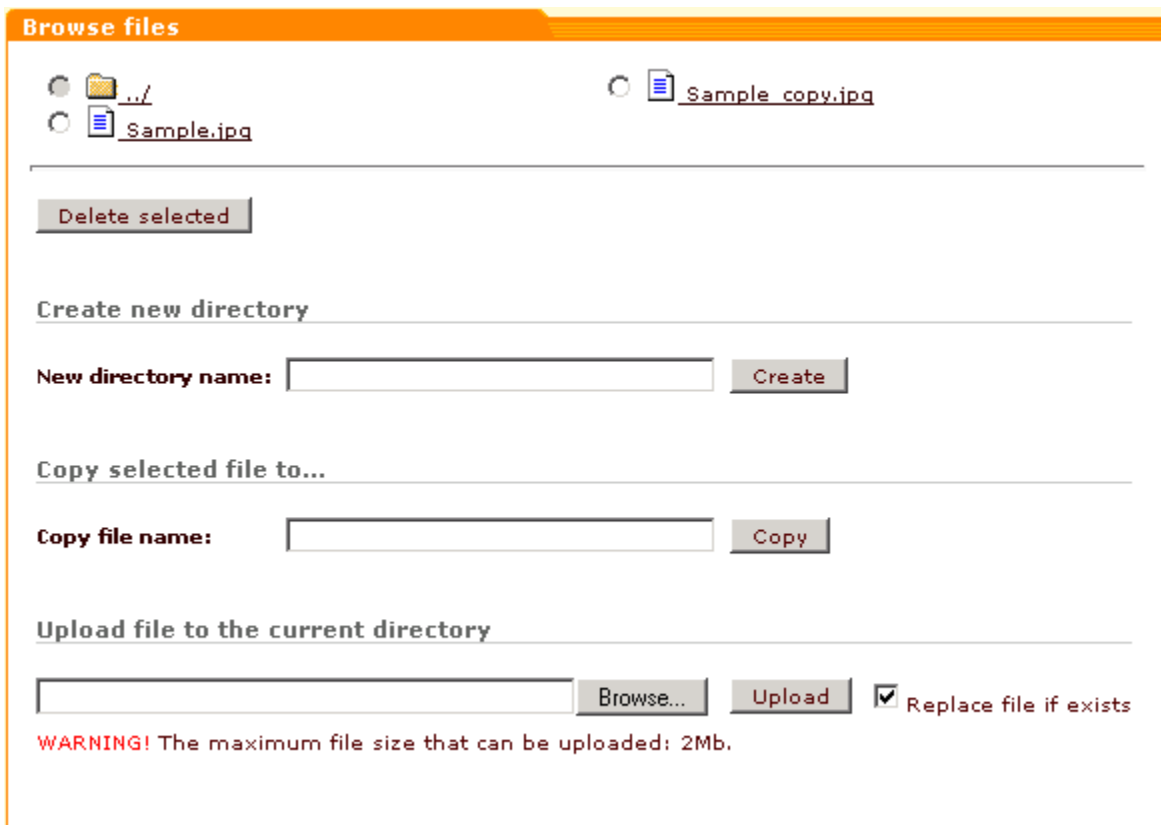
*If you are an X-Cart PRO provider:*

- your files directory is `/xcart/files/your_provider_login` (for example, `/xcart/files/provider`);
- you can access the file manager by clicking on Files in the Inventory menu.

Administrator and provider users have essentially the same privileges regarding management of files: they can upload files onto the server (to their own files directory), create subdirectories within their files directory, copy and delete files stored in their files directory. The difference is that administrator users have permissions to access and control the entire directory `/xcart/files` (including provider files directories - if any), while provider users are not allowed to access the directory structure beyond the directory `xcart/files/provider_login`.

### Creating directories

1. Open the file manager ('Browse files' dialog box). The structure of your files directory is displayed at the top of the dialog box:



2. If you wish to create a sub-directory, navigate to the directory where you wish this sub-directory to be located (To go to a directory, click on its folder icon).
3. Use the field 'New directory name' to enter a name for the sub-directory being created.
4. Click on **Create**. The sub-directory should be created.

## Uploading files from a local computer

1. Open the file manager ('Browse files' dialog box).
2. If necessary, navigate to the directory to which you wish to upload a file.
3. In the 'Upload file to the current directory' section of the 'Browse file' dialog box, click on **Browse**. A window titled 'Select file' should appear.
4. Use the 'Select file' window to locate on your local machine the file which needs to be uploaded and click on **Open**. The name of the selected file should appear in the 'Upload file to the current directory' section.
5. If a file of the same name already exists in the destination directory, and you wish this file to be replaced

by the file you are going to upload, select the 'Replace file if exists' check box.

6. Click the **Upload** button. The file should be uploaded to the selected directory.

## Copying files

1. Open the file manager ('Browse files' dialog box).
2. At the top of the dialog box, locate the file you wish to copy (for example, 'Sample.jpg').
3. Select the radio button next to the name of this file.
4. Use the 'Copy file name' field to enter a name that you wish to be used for the file copy (for example, 'Sample\_copy.jpg').
5. Click on **Copy**. The file should be copied.

## Deleting files/directories

1. Open the file manager ('Browse files' dialog box).
2. At the top of the dialog box, locate the file or directory you wish to delete.
3. Select the radio button next to the name of this file or directory.
4. Click the **Delete selected** button. A window requiring confirmation will appear.
5. Click on **OK** to confirm. (Clicking **Cancel** at this stage cancels the deletion). The selected file or directory should be removed.

**Note:** Deleting a directory causes deletion of all the files and sub-directories under that directory.

## 7.6 Images Location Management

Images used in your online store can be stored either in the database or on the file system. 'Images Location' section of your X-Cart-based store back-end (Administration menu->Images Location) allows you to manage the location of your images.

By default, the dialog box 'Images Location' consists of 3 subsections:

- 'Product thumbnails',

- 'Product images',
- 'Category icons'.

Enabling certain X-Cart modules and add-ons creates additional sections in this dialog:

- Detailed product images - 'Detailed images',
- Manufacturers - 'Manufacturer logos',
- Product options - 'Variant images',
- X-Feature Comparison - 'Product class images',
- X-SpecialOffers - 'Special offer images'

The named sections allow you to control the respective types of images.

### Images Location

---

#### Product thumbnails

Store images in:

Upload all remote images to the selected image repository (database or file system):

Enable digital signature (MD5) verification:

File size limit (bytes)\*:

Default image:

---

#### Product images

Store images in:

Upload all remote images to the selected image repository (database or file system):

Enable digital signature (MD5) verification:

File size limit (bytes)\*:

Default image:

---

#### Category icons

Store images in:

Upload all remote images to the selected image repository (database or file system):

Enable digital signature (MD5) verification:

File size limit (bytes)\*:

Default image:

\*'0' - not limited.

**Store images in:** select if you want to store a certain category of images in the database or on the file system. Storing images on the file system may be helpful if your database performance is poor or its size is limited.

**Upload all remote images to the selected image repository (database or file system):** select this option to save all the images that are not stored on your server to the specified location - file system or database.

**Enable digital signature (MD5) verification:** select this option to compare the digital signature, which is stored in the database with the digital signature of the file itself. If the signatures are not the same, the images will not be displayed.

**File size limit (bytes)\*:** limit the size of the image files to be used. '0' means the file size is not limited.

**Default image:** enter the path to the image to be used if no other image is specified.

## 7.7 DB Backup/Restore

X-Cart provides you with a tool that allows you to back up and restore your X-Cart store database. Backing up your database at regular intervals and before an upgrade is strongly recommended: if something goes wrong, you will be able to recover your data by restoring the database from backup. The backup/restore feature may also be useful when moving your store to another hosting location: before moving, you can have X-Cart generate a database dump, and then you will be able to restore the database from that dump in the new location.

For details study the following chapters:

- [Making a Backup Copy of the Database](#)
- [Restoring the Database from an SQL File](#)

### 7.7.1 Making a Backup Copy of the Database

To back up your database:

1. Go to the 'Database Backup/Restore' section of your store's administration back-end (Administration Menu->DB Backup/Restore). A dialog box titled 'Database Backup/Restore' is displayed:



**Database Backup/Restore**

---

**Backup database**

If all the images are stored in the database they will be included in SQL dump file. If any of the images or all the images are stored on the file system, for backup purposes you should save them to a separate archive file. Account must be taken of the structure of the catalogs in which these images are located.

Write SQL dump to file '/home/user/public\_html/xcart/var/tmp/xcartdump.sql'  
(Do not forget to remove the file after downloading)

**Generate SQL file**

**Note:** Database backup can take several minutes. Please be patient.

---

**Restore database**

**WARNING!** All existing tables will be overwritten. Restoring operation cannot be cancelled.  
Please make a backup copy before restoring the Database.

To restore the images which are stored on the file system, copy them from the archive to X-Cart catalog, taking account of the catalogs structure.

**Browse...** **Restore from file**

**WARNING!** The maximum file size that can be uploaded: 10Mb.  
**Note:** Database restoration can take several minutes. Please be patient.

- Use the subsection 'Backup database' to generate and save your backup SQL file. You may save the file either to your local computer or to the server where your X-Cart is installed (The latter may be convenient if your database is very large and you prefer to download it to your local computer at a later time using your FTP client).

*To generate and save the file onto your local computer:*

- Click the **Generate SQL file** button
- When the 'Save file' window appears, use it to specify the file name and location to which you wish to save the file and click on **Save**.

*To generate and save the file onto the server where your store is installed:*

- Select the check box offering to write your backup file to xcart/var/tmp/xcartdump.sql.
- Click the **Generate SQL file** button.

Be sure to store the generated backup SQL file in a secure place. If you saved the database backup file onto the server, do not forget to remove it from the server after downloading.

## 7.7.2 Restoring the Database from an SQL File

To restore your X-Cart database from a previously generated SQL file:

- Go to the 'Database Backup/Restore' section of your store's administration back-end (

Administration Menu->DB Backup/Restore).

2. Use the 'Restore database' subsection of the 'Database Backup/Restore' dialog box to restore the database:

**Restore database**

---

**WARNING!** All existing tables will be overwritten. Restoring operation cannot be cancelled.  
Please make a backup copy before restoring the Database.

To restore the images which are stored on the file system, copy them from the archive to X-Cart catalog, taking account of the catalogs structure.

Click here to restore SQL dump from file  
- '/home/user/public\_html/xcart/var/tmp/xcartdump.sql' (Do not forget to delete this file after the restoration procedure)

**WARNING!** The maximum file size that can be uploaded: 10Mb.  
**Note:** Database restoration can take several minutes. Please be patient.

**Note:** The 'Restore database' subsection displays the Restore button only if the database backup file is named xcartdump.sql and is located inside the directory xcart/var/tmp/ on the server.

*If the backup file you wish to use for database restoration is located on your local machine:*

- a) Click on **Browse**.
- b) In the 'Select file' window, locate the SQL file and open it.
- c) When the selected file name appears in the respective field of the 'Restore database' subsection of the 'Database Backup/Restore' dialog box, click the button **Restore from file**.

*If the backup file you wish to use for database restoration is located in the xcart/var/tmp/ directory on the server:*

Click the **Restore** button displayed in the 'Restore database' subsection.

Please be aware that, when you restore the database, all existing database tables are overwritten. To avoid data loss, always back up your existing database before database restoration.

Also note that database restoration works successfully only if the version of the database backup file being used for DB restoration is the same as the version of the X-Cart software used by the store.

## 7.8 Upgrading X-Cart

X-Cart software is constantly improving. As new X-Cart versions are released, the software becomes more powerful, efficient and secure.

It is natural that at some point you might decide you wish to get the improvements of a more recent version. Getting an improved version of X-Cart software is possible. There are two methods that you should consider:

- upgrading your store (using X-Cart upgrade packs);
- installing the desired new version of the software and moving the existing data from your store into it.

The choice of method depends largely on two factors:

- difference between the version of X-Cart software used by your current store and the version you wish to get;
- number and complexity of customizations (modifications) implemented in your current store.

As long as the difference between the versions is not too large (both the versions belong to the same branch), and the customizations are not too many, upgrading your store should be your method of choice: it spares you the necessity to reinstall your store and allows you to keep the existing store design and customizations. However, if the versions are too far apart, or your current store is heavily customized, upgrading with upgrade packs may not be possible; in this case, you still can get the improvements by installing a new version of X-Cart from the distribution - keeping, as much as possible, your existing data.

For details, study the following sections:

- [Upgrading Your Store with Upgrade Packs](#)
- [Re-Installing Your Store \(Keeping Your Data\)](#)

Please be aware that, whatever the method, switching to a different X-Cart version may be a complicated task, especially for customized stores. If you are not sure that you can handle the task by yourself, please feel free to order upgrade services from X-Cart technical support.

## 7.8.1 Upgrading Your Store with Upgrade Packs

### General information about X-Cart upgrade packs

An X-Cart upgrade pack is a set of patch files that can be applied to an X-Cart installation to upgrade it to a newer, improved version. The patch files contained in an upgrade pack describe the changes that need to be made to the files and database of your X-Cart installation in order to bring your store to the newer version.

X-Cart upgrade packs are distributed via X-Cart's Help Desk system. Each pack is supplied in a file with the extension .tgz; the extension .tgz means that it is an archive - a bundle of files packaged with tar and subsequently compressed with gzip. Before an upgrade pack can be applied to your X-Cart installation, it needs to be extracted from the TGZ archive. The extraction can be performed by your favorite archiver

program, provided that this archiver program can work with this type of files (For example, on Windows one can use WinZIP or WinRAR; on Unix - tar or gunzip).

In non-customized stores and stores customized but slightly, upgrade packs can be applied automatically through a special interface in the Admin zone of your store - Patch/Upgrade center. In heavily customized stores, upgrade packs have to be applied manually, by applying individual patches to individual files of your X-Cart installation.

## Upgrading within X-Cart 3.5.x and 4.0.x branches

If the version of X-Cart software used by your store is 3.5.x or 4.0.x, upgrading your store to a newer version within the same branch (for example, from 3.5.8 to 3.5.14, or from 4.0.6 to 4.0.17) will be rather a complicated and time-consuming procedure.

To upgrade, you will need to obtain the necessary upgrade pack from the File area of X-Cart Help Desk and apply it to your X-Cart installation. If the version of X-Cart used by your store and the target X-Cart version (the version to which you are upgrading) are not consecutive, and there is not a "jump" patch (an upgrade pack that can bring your store to the target version directly), you will have to obtain several upgrade packs and apply them one after another gradually upgrading your X-Cart software from version to version.

*For example, you will have to use several upgrade packs to upgrade from 4.0.6 to 4.0.19. There is not a jump patch from 4.0.6 to 4.0.19, but there are small upgrade packs for upgrading between consecutive versions and a jump patch for upgrading from 4.0.6 to 4.0.17. It is in your interest to use as few individual upgrade packs as possible, so the recommended succession of upgrade packs would be from 4.0.6 to 4.0.17, then from 4.0.17 to 4.0.18, and, finally, from 4.0.18 to 4.0.19.*

The difficulties associated with upgrading your store within the 3.5.x or 4.0.x branch are the following:

- Upgrade packs can be applied automatically through your store's Patch/Upgrade center only if your store has not been customized or if the store's customizations are so small that the upgrade pack being applied does not affect the functionality introduced by the customizations. If, however, your store has any customizations that have changed X-Cart's original functionality in a part that needs to be modified by the patches contained in the upgrade pack, you will be required to control the process of upgrade pack application more closely and to apply at least some portions of the upgrade pack manually; this requires experience in PHP, HTML and MySQL.
- After upgrade, you will have to re-install the skin set and add-on modules that were installed in your store.

## Upgrading within X-Cart 4.1.x branch

In the 4.1.x branch, X-Cart's upgrade system has been changed significantly, so upgrades have become a

lot easier than they used to be in the previous branches. You no longer need to re-install your add-on modules and skin sets after upgrading X-Cart because now they can be upgraded *with* X-Cart.

To upgrade, you need to log in to X-Cart's Help Desk and generate an upgrade pack containing all the necessary modifications for your X-Cart and the skin set and add-on modules installed in your store. After that, you need to download the upgrade pack from the Help Desk and apply it to your X-Cart installation.

The only difficulty associated with upgrading your store within the 4.1.x branch is that, if you use X-Cart's Patch/Upgrade center, the necessary changes will be applied to your store automatically only if your store does not have any customizations/modifications affecting the functionality subject to modification by the upgrade pack; if your store has such customizations, you will be required to control the process of upgrade pack application more closely and to apply at least some portions of the upgrade pack manually; this requires experience in PHP, HTML and MySQL.

## Upgrading procedure

The procedure of upgrading an X-Cart-based store includes the following steps:

1. Backing up the store (See the chapter [Backing Up Your Store Before an Upgrade](#))
2. Obtaining the necessary upgrade pack(s) (See the chapter [Obtaining Upgrade Packs for Your Store](#)).
3. Applying the upgrade pack(s) to the store (See the chapter [Applying X-Cart Upgrade Packs](#)).
4. Making sure the upgrade has been completed successfully, restoring the original file permissions and removing temporary files (See the chapter [After Upgrade](#)).

### 7.8.1.1. Backing Up Your Store Before an Upgrade

Before upgrading, *back up your store*. Backing up is essential. When you have a backup, you can recover your store data if your store stops functioning as a result of an upgrade.

To back up:

1. Use the 'Database Backup/Restore' section of your store's administration back-end to create a dump of your store's database (For details, study the chapter [Making a Backup Copy of the Database](#)).
2. Create a backup of the contents of the directory in which your X-Cart is installed.
3. Put the backup of your store files and the database dump in a secure place.

Also, it is recommended that you perform the upgrade not on your actual store, but on its copy. After you make sure the upgraded store looks and functions correctly, you will be able to move it to the location of your actual store.

### 7.8.1.2. Obtaining Upgrade Packs for Your Store

To obtain an upgrade pack for your X-Cart store, you need to log in to your X-Cart Help Desk account and follow these steps:

**If the version of your store is 3.5.x or 4.0.x:**

1. Go to X-Cart File area.
2. Open the folder X-Cart -> Upgrade kits.
3. Find the desired upgrade pack.

All available upgrade packs for 3.5.x versions can be found in the folder Upgrade kits for 3.5.x branch, for 4.0.x versions - Upgrade kits for 4.0.x branch.

You should choose an upgrade pack with a name in the following format:

[current\_version]-[target\_version]-gold\_upgrade.tgz or

[current\_version]-[target\_version]-pro\_upgrade.tgz,

where the [current\_version] element should be the current version number of your store, the [target\_version] element - the version to which you would like to upgrade, and the 'gold' or 'pro' prefix should correspond to the edition of X-Cart on which your store is based (X-Cart GOLD or X-Cart PRO).

4. Download the upgrade pack TGZ file to your local computer.

**If the version of your store is 4.1.x:**

1. Go to the section 'My Licenses'.
2. In the list of your licenses, find the license of the shop that you wish to upgrade and click on the link 'Upgrade' opposite this license.

You are redirected to a section titled 'Get upgrade pack for [license\_number] X-Cart ([license\_URL])'. In this section, a drop-down box labeled 'Licenses' displays the license you have just selected. The 'Modules' list below the 'Licenses' drop-down box shows a list of add-on modules and skin sets available on the selected license.

3. Make sure the license shown in the 'Licenses' drop-down box is the one that needs to be upgraded (if not, use the drop-down box to select a different license).
4. In the 'Modules' list, select the add-ons and skin sets that need to be upgraded with the shop (Select the appropriate check boxes).
5. From the 'Upgrade pack' drop-down box, select the upgrade pack that is intended for upgrading the current version of your store to the desired version.
6. Click the 'Get upgrade pack' button.

The system generates the upgrade pack and offers to save it to your computer in the form of a TGZ file.

7. Save the upgrade pack TGZ file to your local computer.

### 7.8.1.3. Applying X-Cart Upgrade Packs

To apply an upgrade pack to your X-Cart installation:

1. Obtain the necessary upgrade pack (a TGZ archive).
2. Make sure you can change file permissions for the files of your X-Cart installation.

**Note:** please make sure that the directory structure must preserve the default location of the admin, provider, partner directories, otherwise the upgrade procedure cannot be performed correctly.

3. Place the upgrade pack in the directory where your X-Cart is installed:

*Windows server, or UNIX server without terminal access:*

- a) Decompress the upgrade pack TGZ archive on your local computer using your favorite compression program (WinZIP or any other archiver with support for TAR files).
- b) Use an FTP client to upload the resulting files to the directory where your X-Cart is installed retaining the directory structure.

*UNIX server with terminal access:*

- a) Use an FTP client to upload the upgrade pack TGZ archive to the directory where your X-Cart is installed.
- b) Decompress the archive using one of the following commands:

```
gunzip < upgrade_pack_file_name.tgz | tar -xvf -
```

or

```
tar -xzvf upgrade_pack_file_name.tgz
```

4. Open X-Cart's Patch/Upgrade center (Administration menu->Patch/Upgrade). At the top of the page, a dialog box titled 'Upgrade' is provided:



5. Use the 'Upgrade' dialog box to start applying the upgrade pack:
  - a) From the 'Target version' drop-down box, select the version to which you would like to upgrade your store.
  - b) Click on **Apply**.

X-Cart will check whether the upgrade pack can be applied to the files of the installation and will output the results of this check onto the screen. You will get a **'non-writable'** message for all the files that need to be

patched by the upgrade pack but are lacking write permissions. Change the permissions for these files so the upgrade script can rewrite them. Run the check again to see if there are any other issues that can prevent the upgrade pack from being applied.

For example, you may get **'could not patch'** statuses for some of the files. The 'could not patch' status of a file means that this file has been changed significantly as compared to the fresh installation (probably, because of some sort of customization) and cannot be patched automatically.

In order to proceed with the upgrade procedure you should unselect the check-box "Tick here if you want to try to apply the patch to these files" at the very bottom of the page "Step 1 of 2: Testing patch applicability and generation list of files", then click on "Apply patch". As result, the files that can not be patched automatically will be skipped, but all the other files will be patched automatically and the database will be upgraded.

After that to complete the upgrade you need to manually apply the appropriate patches to the files which have not been patched automatically (got the status 'could not patch'). For example, to patch the file "include/product\_modify.php" you should manually apply the patch "include/product\_modify.php.diff" from the upgrade package.

If you can, resolve the issues that have been detected by the check procedure. After that you should be able to continue with the application of the upgrade pack.

The upgrade script will automatically patch all the files it can patch; the files that have not been patched by the script automatically will need to be patched manually. Manual patching consists in applying to your X-Cart installation of the DIFF files that have not been applied during the automatic application of an upgrade pack.

**Note:** Detailed information on DIFF files can be found at <http://www.gnu.org/software/diffutils/manual/diff.html>

#### 7.8.1.4. After Upgrade

After upgrading your X-Cart, please check whether the updated scripts, templates and database work correctly. It is recommended that you log in into every zone of your X-Cart store and make sure there aren't any error messages on the pages and everything works as supposed. If you experience any problems with the upgraded X-Cart, recover your store from backup (Restore the previously installed version of X-Cart software and restore your database). For details, see the section [Recovering from a Failed Upgrade](#).

Another important thing to do after an upgrade is to restore the original permissions for the files that have been patched and remove all the temporary files from the directory `<xcart>/templates_c`.



### 7.8.1.5. Recovering from a Failed Upgrade

If an upgrade goes wrong, you may recover your store from backup.

1. Remove the unsuccessfully upgraded store (wipe out the files and the database).
2. Unpack the archive with your X-Cart store backup into your store directory.
3. Log in to the Admin zone of your store and restore the database (Administration menu-> DB Backup/Restore). Instructions for restoring a database are available in the chapter [Restoring the Database from an SQL File](#).

## 7.8.2 Re-Installing Your Store (Keeping Your Data)

When upgrading X-Cart with standard upgrade packs is impossible (like when the store needs to be upgraded between branches) or impractical (like when the store has a lot of customizations), you can switch to a newer version of X-Cart by re-installing your store. There are two methods that you can use. The first method is good for non-customized and very slightly customized stores that need to be upgraded from the 3.5.x or 4.0.x branch to 4.1.x (See the chapter [Upgrading Between Branches](#)). The second method is good for heavily customized stores, regardless of the version (See the chapter [Importing Your Existing Data into a New Store](#)).

### 7.8.2.1. Upgrading Between Branches

If your store belongs to the 3.5.x or 4.0.x branch, it will not be possible to upgrade it to a version from the 4.1.x branch just by applying upgrade packs.

To upgrade, follow these steps:

1. Upgrade your store to the latest version of the branch (3.5.14 or 4.0.19 respectively). (For instructions, see the section [Upgrading Your Store with Upgrade Packs](#)).
2. Upgrade your store's database to the target 4.1.x version. The easiest way to upgrade the database is to use a database upgrader - a utility for upgrading the database to a specific version (provided by X-Cart through the Help Desk). You should understand that you will be able to use the database upgrader only if your store's database structure has not been changed by a customization. If the database has been customized, you will have to upgrade it manually.

To obtain an appropriate database upgrader:

- a) Log in to the Help Desk.
- b) In X-Cart File area, find the database upgrader for your desired target version:

- 3.5.14-4.1.x\_sql\_upgrade.tgz (if you are upgrading from 3.5.14)
- 4.0.19-4.1.x\_sql\_upgrade.tgz (if you are upgrading from 4.0.19)

c) Download the database upgrader TGZ file onto your local computer.

Back up your store once more before applying the database upgrader: make a copy of your 3.5.14/4.0.19 store and of its database. Do the database upgrade on that copy (not the database used by your working store). This way you will not lose your database if the database upgrade goes wrong.

Use the database upgrader to upgrade your store's database to the desired 4.1.x version:

- a) Upload the upgrader TGZ file to the store server and unpack it to the directory in which X-Cart is installed.
  - b) Run the script `upgrade_sql.php`. To do so, point your web browser to the location `<Your_X-Cart_store_URL>/upgrade_sql.php` (like `http://www.example.com/xcart/upgrade_sql.php`) and press ENTER.
3. Install the desired 4.1.x version of X-Cart from the distribution and point it to the upgraded database. As a purchaser of X-Cart software, you have free access to all new X-Cart releases via X-Cart's Help Desk system, so getting a distribution of the latest X-Cart version should not be a problem. While running the 4.1.x installer, specify the upgraded database as the database to be used with the new installation. Also, select the checkbox 'Update config.php only' to keep the existing data.
4. If your 3.5.x/4.0.x store has any customizations that you wish to use in the new 4.1.x store, re-implement them in the new installation.

### 7.8.2.2. Importing Your Existing Data into a New Store

If your current store has so many customizations that to upgrade it with upgrade packs would be too difficult a task, you may choose not to upgrade your store, but install a new one and move the data from your current store into it.

Follow these steps:

1. Obtain a distribution of the desired version of X-Cart software. As a purchaser of X-Cart, you have free access to all new X-Cart releases via X-Cart's Help Desk system, so getting a distribution of the latest X-Cart version should not be a problem.
2. Install a new store from the distribution.
3. Export all types of data that need to be imported into your new store from your current store to CSV format.
4. If the version of your current store is 3.x.x or 4.0.x, and the new store is 4.1.x, log in to the administration back-end of the new store and enable it to import data in the 3.x.x/4.0.x format (Enable and configure the module [Import 3x-4x](#)).
5. Import the CSV-formatted data into your new store. Make sure the new store functions correctly after data import.

6. Re-implement customizations in the new store.

## 7.9 Applying Patches

X-Cart provides an interface that allows you to apply patches. The two types of patches that you might need to apply in X-Cart are file patches and SQL patches.

Here's an explanation of how patches are applied in X-Cart:

- [Applying File Patches](#)
- [Applying SQL Patches](#)

**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.

### 7.9.1 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 a URL.

Applying the patch 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. You see the 'Apply patch' form:



**Apply patch**

Patch file:

**OR**

Patch URL:

Reverse:

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 specified patch that has already been applied.

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. Then the results of patch applicability testing will be shown to you in the 'Applying patch' form.

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.

7. **Applying the patch** (Step 2 of 2). Clicking on the **Apply patch** button initiates the process of applying the patch. During this process the differences contained in the \*.diff files are implemented in the source code of your X-Cart.

The process of upgrade patch application is shown on the screen:

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_centri.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.

The following problems may arise:

**checksum error** - patch contents is corrupted;

**non-writable** - writable permission has not been given to the file, please give it writable permission;

**not a file** - the target is not a file;

**not exists** - the necessary file is missing;

**could not patch** - the patch cannot be applied to this file automatically, because it has been significantly modified, the patch should be applied to this file manually

When the patch has been successfully applied, 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;

Diff files are divided into parts ("hunks"). Each "hunk" starts with a line like this:

```
@@ -160,7 +160,7 @@
```

where:

160 - indicates the number of the line of the code where the changes start

7 - indicates the number of the lines in the hunk before patch applying

7 - indicates the number of the lines in the hunk after patch applying

2. Edit the file (admin/category\_modify.php). Find the line, which is marked by "-" in the text of patch and remove it.
3. Insert the line marked by "+" in the text of patch.

If you cannot apply the patch in these ways it means the file that needs to be patched has been modified or this file is from another version of X-Cart and cannot be patched by this patch. Ask technical support to help you.

## 7.9.2 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.

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.

**Apply SQL patch**

Patch file:

**OR**

Patch URL:

**OR**

SQL query(ies):

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 applying the patch, click on **Apply**.
5. The text of the patch will be shown to you in the 'Patch text' field.

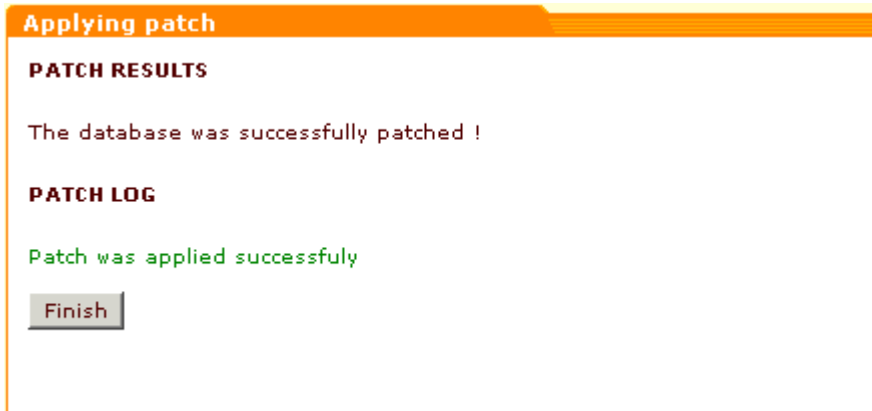
**Applying patch**

Patch text:

```
INSERT INTO xcart_languages VALUES ('US','Airborne
account','lbl_arb_account','Airborne
account','Labels','');
INSERT INTO xcart_config VALUES ('ARB_id','Airborne
API System ID','','Shipping',90,'text','');
INSERT INTO xcart_config VALUES
('ARB_password','Airborne API
password','','Shipping',100,'text','');
INSERT INTO xcart_config VALUES
```

Click on **Apply patch** to continue.

6. The results of patching your database will be shown to you.



If no errors occurred, click on **Finish**.



## 8 Modules

This section provides information on the following X-Cart modules:

- [Advanced Statistics](#)
- [Antifraud Service](#)
- [Bestsellers](#)
- [Customer Reviews](#)
- [Detailed Product Images](#)
- [Discount Coupons](#)
- [Egoods](#)
- [Extra Fields](#)
- [Fast Lane Checkout](#)
- [Froogle/GoogleBase](#)
- [Gift Certificates](#)
- [Google Checkout](#)
- [Greet Visitor](#)
- [Image Verification](#)
- [Import 3x-4x](#)
- [Interneka](#)
- [Maintenance Agent](#)
- [Manufacturers](#)
- [News Management](#)
- [Order Tracking](#)
- [Product Options](#)
- [QuickBooks](#)
- [Recommended Products](#)
- [Shipping Label Generator](#)
- [Simple Mode](#)
- [SnS connector](#)
- [Stop List](#)
- [Subscriptions](#)
- [UPS Online Tools](#)
- [Upselling Products](#)
- [Users Online](#)
- [Wholesale Trading](#)
- [Wishlist](#)

Any of the above X-Cart modules can be enabled via the Modules section of X-Cart administration back-

end (Administration menu->Modules).

## 8.1 Advanced Statistics

### What Advanced statistics module does

Advanced Statistics module enables Shop statistics and Tracking statistics in your store.

### Roles in Advanced statistics module management

If you are an X-Cart GOLD administrator/provider or an X-Cart PRO administrator:

- You can enable/disable and configure Advanced Statistics module (See [Enabling and Configuring 'Advanced Statistics'](#)).
- You can view your store's Shop statistics (See [Understanding Shop Statistics](#)).
- You can view your store's Tracking statistics (See [Understanding Tracking Statistics](#)).

If you are an X-Cart PRO provider:

- You cannot view statistics.

### 8.1.1 Enabling and Configuring 'Advanced Statistics'

To begin using the module:

1. Enable Advanced statistics module (Administration menu->Modules).

When the module is enabled, a section titled 'Advanced statistics options' appears in General settings/Modules options.

2. Adjust the module settings via General settings/Modules options->Advanced statistics options:

**General settings**

**Advanced Statistics options**

Enable shop statistics gathering:

Enable tracking statistics gathering:

Save

- Enable shop statistics gathering: Select this checkbox to start gathering shop statistics. Unselect to stop.
- Enable tracking statistics gathering: Select this checkbox to start gathering tracking statistics. Unselect to stop.
- Click the **Save** button to save the changes.

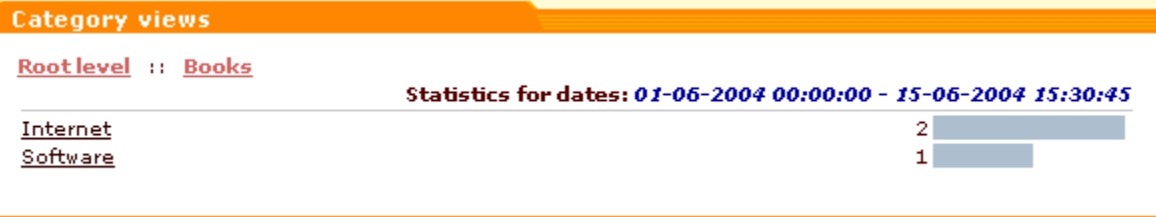
## 8.1.2 Understanding Shop Statistics

'Shop statistics' page allows you to find out statistics on category views, product views, product sales, products removed by customers from the shopping cart and referrer 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.



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.



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.



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').



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.



'Referrer statistics' section allows you to find out what sites referred visitors to your store most effectively.



---

## 8.1.3 Understanding Tracking Statistics

Your store's tracking statistics includes the following types of statistical data:

- Top paths through site
- Top page views
- Shopping cart conversion funnel

### 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.

### Top Paths Through Site

#	PATHS THROUGH SITE (AVERAGE TIME)	VISITS	%
1	1. <a href="#">/msvowl/eshop_dohatur/customer/home.php?cat=23</a> (7.00) 2. <a href="#">/msvowl/eshop_dohatur/customer/home.php?cat=3</a> (3.00)	1	11.11
2	1. <a href="#">/msvowl/eshop_dohatur/customer/home.php?cat=3</a> (3.00) 2. <a href="#">/msvowl/eshop_dohatur/customer/home.php?cat=23</a> (7.00) 3. <a href="#">/msvowl/eshop_dohatur/customer/home.php?cat=3</a> (3.00)	1	11.11
3	1. <a href="#">/msvowl/eshop_dohatur/customer/home.php?cat=3</a> (3.00) 2. <a href="#">/msvowl/eshop_dohatur/customer/home.php?cat=23</a> (7.00)	1	11.11
4	1. <a href="#">/msvowl/eshop_dohatur/customer/home.php?cat=23</a> (7.00) 2. <a href="#">/msvowl/eshop_dohatur/customer/home.php?cat=3</a> (3.00) 3. <a href="#">/msvowl/eshop_dohatur/customer/home.php?cat=23</a> (7.00)	1	11.11
5	1. <a href="#">/msvowl/eshop_dohatur/customer/home.php?cat=3</a> (3.00) 2. <a href="#">/msvowl/eshop_dohatur/customer/home.php?cat=23</a> (7.00) 3. <a href="#">/msvowl/eshop_dohatur/customer/home.php?cat=3</a> (3.00) 4. <a href="#">/msvowl/eshop_dohatur/customer/home.php?cat=23</a> (7.00)	1	11.11
6	1. <a href="#">/msvowl/eshop_dohatur/customer/home.php?cat=23</a> (7.00) 2. <a href="#">/msvowl/eshop_dohatur/customer/register.php</a> (0.00)	1	11.11
7	1. <a href="#">/msvowl/eshop_dohatur/customer/home.php?cat=3</a> (3.00) 2. <a href="#">/msvowl/eshop_dohatur/customer/home.php?cat=23</a> (7.00) 3. <a href="#">/msvowl/eshop_dohatur/customer/register.php</a> (0.00)	1	11.11
8	1. <a href="#">/msvowl/eshop_dohatur/customer/home.php?cat=23</a> (7.00) 2. <a href="#">/msvowl/eshop_dohatur/customer/home.php?cat=3</a> (3.00) 3. <a href="#">/msvowl/eshop_dohatur/customer/home.php?cat=23</a> (7.00) 4. <a href="#">/msvowl/eshop_dohatur/customer/register.php</a> (0.00)	1	11.11
9	1. <a href="#">/msvowl/eshop_dohatur/customer/home.php?cat=3</a> (3.00) 2. <a href="#">/msvowl/eshop_dohatur/customer/home.php?cat=23</a> (7.00) 3. <a href="#">/msvowl/eshop_dohatur/customer/home.php?cat=3</a> (3.00) 4. <a href="#">/msvowl/eshop_dohatur/customer/home.php?cat=23</a> (7.00) 5. <a href="#">/msvowl/eshop_dohatur/customer/register.php</a> (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.

You can view any page in a path by clicking on its URL.

## Top page 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.

### Top Pages Views

PAGE URL	AVERAGE TIME	VISITS	%
1. <a href="#">/~svowl/eshop_dohatur/customer/cart.php</a>	4	21	42.86
2. <a href="#">/~svowl/eshop_dohatur/customer/home.php</a>	3	7	14.29
3. <a href="#">/~svowl/eshop_dohatur/customer/home.php?cat=75</a>	4	5	10.20
4. <a href="#">/~svowl/eshop_dohatur/customer/</a>	1	4	8.16
5. <a href="#">/~svowl/eshop_dohatur/customer/register.php?</a>	14	2	4.08
6. <a href="#">/~svowl/eshop_dohatur/customer/home.php?cat=3</a>	3	2	4.08
7. <a href="#">/~svowl/eshop_dohatur/customer/home.php?cat=23</a>	2	2	4.08
8. <a href="#">/~svowl/eshop_dohatur/customer/register.php</a>	72	1	2.04
9. <a href="#">/~svowl/eshop_dohatur/customer/error_message.php?login_incorrect</a>	34	1	2.04
10. <a href="#">/~svowl/eshop_dohatur/customer/home.php?cat=79</a>	5	1	2.04
11. <a href="#">/~svowl/eshop_dohatur/customer/giftcert.php</a>	3	1	2.04
12. <a href="#">/~svowl/eshop_dohatur/customer/home.php?cat=243</a>	2	1	2.04
13. <a href="#">/~svowl/eshop_dohatur/customer/home.php?cat=81</a>	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.

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') after they have placed their order successfully (order status is set to "Processed" or "Queued").

#### 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 Scenario 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.



## 8.2 Antifraud Service

### What Antifraud service module does

For better merchant protection from online credit card fraud X-Cart has an integrated fraud screening facility. Antifraud service is a subscription based service; however with X-Cart license we offer a free trial for antifraud screening.

Antifraud service runs on the servers of our company. We are utilizing MaxMind's GeoIP/minFraud service for Antifraud service. GeoIP databases are 99% accurate on a country level, 85% accurate on a state level, and 80% accurate for the US within a 25 mile radius. But the risk factor is assessed by our unique algorithms based on our substantial experience in online credit card processing and which are specially adapted to be used in X-Cart shopping cart system. No sensitive private customer's information (like name, email address, CC numbers) is sent to our screening servers during antifraud checks.

If fraud screening is enabled, X-Cart transfers non personal data about a placed order to our antifraud service, where the request is processed and estimated risk factor for the order is returned. If risk factor exceeds the specified threshold then the order is delayed for manual check (phone call to a buyer, asking for additional evidence of authenticity etc.). Antifraud system provides a detailed report with an explanation what was suspicious about the order. This functionality is particularly useful when selling goods with immediate electronic delivery (like software, music, content etc.) because this kind of goods are most often ordered using stolen credit cards.

More information about our Antifraud service is available here: [http://www.x-cart.com/antifraud\\_service.html](http://www.x-cart.com/antifraud_service.html).

### Roles in Antifraud module management

If you are an X-Cart GOLD administrator/provider or an X-Cart PRO administrator:

- You can enable/disable Antifraud service module and adjust its configuration settings (Check out [Enabling and Configuring 'Antifraud service'](#)).
- You can view the results of screening of an order by Antifraud service in the order details (Study [Using the Results of 'Antifraud service' Check-up](#)).
- You can use the 'IP Lookup' service to trace the actual physical location of a customer by the IP address from which an order was placed and, if necessary, to measure the distance between the customer's location and any other location, for example, the location of your company, or the billing

address provided in an order (See [Using the 'IP Lookup' Service](#)).

If you are an X-Cart PRO provider:

- You do not have access to the results of order screening and 'IP Lookup' service.

## 8.2.1 Enabling and Configuring 'Antifraud service'

To begin using the module:

1. Obtain a subscription key for Antifraud service module (Check out the 'Purchase services' page in your personal HelpDesk area at <https://secure.qualiteam.biz>)
2. Enable Antifraud service module (Administration menu->Modules).

When the module is enabled, you can see Antifraud options section in General settings/Modules options. If you already have some orders at your store, you can see a new section in the 'Order details' form titled 'Antifraud checking result'. There should also be a **Lookup address** button in the 'Order details' form before the 'Order details (not visible to customer and provider)' field.

3. Adjust the module settings via General settings/Modules options->Antifraud options:

### General settings

#### Antifraud options

---

#### General antifraud service options

Antifraud module subscription key:	<input style="width: 100%;" type="text"/>
Fraud risk factor threshold value (Antifraud module). If fraud risk factor is greater than this limit, order status will be 'Queued':	<input style="width: 100%; text-align: center;" type="text" value="5"/>
Antifraud safe distance (km):	<input style="width: 100%; text-align: center;" type="text" value="350"/>
Order total threshold (an order is considered large if the order total exceeds this amount):	<input style="width: 100%; text-align: center;" type="text" value="500"/>
Run anti-fraud check on orders with zero 'order total':	<input checked="" type="checkbox"/>

#### Email notifications

'Antifraud service key is invalid' notification to orders department:	<input checked="" type="checkbox"/>
'Antifraud service key is expired' notification to orders department:	<input checked="" type="checkbox"/>

- a) Enter your Antifraud module subscription key into the appropriate field.
- b) Specify the desired Fraud risk factor threshold value. Orders with a Fraud risk factor greater than the value specified in this field will not be processed automatically.

**Note:** A *Fraud risk factor* value that will be calculated by Antifraud service module with reference to a certain order will represent a number from 1 to 10 (the greater the number, the higher the probability of fraud from the corresponding IP address). The field 'Fraud risk factor threshold value' allows you to specify, how great a Fraud risk factor of an order must be for the order to be considered fraudulent.

*For example,* if you set the Fraud risk factor threshold value to '5' (which corresponds to 50% risk of fraud), all the orders with Fraud risk factor rates from 6 to 10 will be considered potentially fraudulent. X-Cart will not process such orders automatically: they will be placed with the status 'Queued', so you will be able to review them personally at a later time and decide, whether you want to process them or not. If you find a certain order to be fraudulent, you will be able to report the IP address from which the order originated to the Antifraud service server as a source of fraudulent orders. This will prevent further fraudulent orders coming from this IP.

- c) Use the 'Antifraud safe distance' field to specify the distance between a billing address location and

an IP address location which you wish to treat as safe. Any order originating from an IP address located within the Antifraud safe distance from the address provided by the customer at checkout will be processed as non-fraudulent.

**Note:** For all the users outside the safe distance, the risk of fraud will be defined based on the Fraud risk factor.

- d) Use the 'Order total threshold' field to specify an order subtotal amount starting from which an order will be considered 'large'. Antifraud service believes large orders to provide a greater risk for store owners, so it uses an additional coefficient to increase the Fraud risk factor of an order if its subtotal exceeds the value provided in this field.
- e) If you wish to screen by Antifraud service orders whose order total amount is '0' (zero), select the 'Run anti-fraud check on orders with zero 'order total'' check box.
- f) If you wish email notifications to be sent to the orders department of your store if something goes wrong with your Antifraud module subscription key, select the appropriate check boxes in the Email notifications subsection of the Antifraud options section. 'Antifraud service key is invalid' notification will be sent if the value entered into the 'Antifraud module subscription key' field is not a valid subscription key. 'Antifraud service key is expired' notification will be sent when your subscription to Antifraud service expires.
- g) Click on **Save**.

## 8.2.2 Using the Results of 'Antifraud service' Check-up

The results of screening of an order by Antifraud service can be found in the 'Antifraud checking result' subsection of the 'Order details' form.

The results of an Antifraud service check-up most probably look as follows:

### **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** 

Fraud risk factor is a number from 1 to 10 reflecting the risk of fraud associated with the order.

**Important:** Fraud risk factor is formed in the following way:

an order total is greater than the order total threshold - fraud risk factor is multiplied by 2

a customer has processed orders - fraud risk factor is divided by 2

a customer has cancelled orders - fraud risk factor is multiplied by 1,5

a customer from the same IP address is trying to place an order under a different name - fraud risk factor is multiplied by 2.

If two or more of these events occur in one order, the fraud risk factor is multiplied using all the applied coefficients.

Total requests - a total number of requests to Antifraud service that you are allowed to make with your current Antifraud subscription key.

Used requests - a number of requests to Antifraud service that is already used.

Antifraud additional fields (*optional*) - Antifraud service module service flags.

If Antifraud service is unable to provide any information about the IP address used to place an order, you are informed about it by the following 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.

As orders get screened by Antifraud service at the time of placement, it is natural that orders placed when Antifraud service module is turned off will not have any Antifraud service check-up results in their details. A warning will be displayed in the place of the order's Antifraud check-up results:

#### Antifraud checking result

The order has not been checked by Antifraud service because Antifraud module was turned off at the time of order placement.

[Check order in Antifraud service](#) **Go**

If, for some reason, an order was not checked by Antifraud, or if you failed to get the results of the check-up (for example, because of a connection failure just after the order was placed), you can request another check-up of the order by Antifraud. To do so, click the [Check order in Antifraud service](#) link. Your request will be re-sent to the Antifraud service server.

**Note:** If the 'Check order in Antifraud service' link does not appear on the page, make sure Antifraud service module is enabled and Antifraud module subscription key is entered on the General settings/Modules options->Antifraud options page.

Antifraud service subscription key is valid for a limited number of times. As soon as your Antifraud service subscription key expires, you will be notified about it by a warning message in the 'Antifraud checking results' subsection of the 'Order details' form:

#### **Antifraud checking result**

---

**Warning!** Antifraud service key expired!  
You can purchase Antifraud Service subscription [here](#) or get your free trial key [here](#) (if it has not been used).

[Check order in Antifraud service](#) **Go**

If you get this message and want to continue using Antifraud, order a new Antifraud service subscription key from X-Cart.

If the key entered into the 'Antifraud module subscription key' field of the 'Antifraud options' form is not a valid Antifraud module subscription key, you will be informed that your Antifraud service key is invalid:

#### **Antifraud checking result**

---

**Warning!** Antifraud service key is invalid!  
You can purchase Antifraud Service subscription [here](#) or get your free trial key [here](#) (if it has not been used).

[Check order in Antifraud service](#) **Go**

If you get this message, make sure the Antifraud module subscription key in the 'Antifraud options' form is entered correctly.

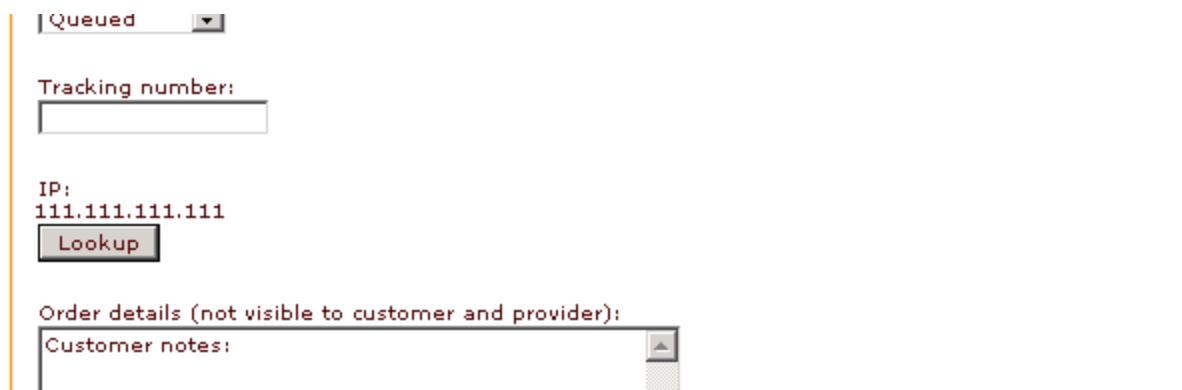
If you wish to get email notifications in the event that your Antifraud module subscription key becomes invalid or expired, enable the corresponding email notifications on the General settings/Modules options->Antifraud options page.

## 8.2.3 Using the 'IP Lookup service' tool

Antifraud service module comes with an 'IP Lookup service' tool that allows you to find out the actual location of a customer who placed an order by his or her IP address. It also allows you to compare this location with other known addresses.

To find out the IP address of a customer who placed an order:

1. Open the order (Management menu->Orders, search for the necessary order using the 'Search for orders' form, view the order details).
2. In the 'Order details' form, find the section 'IP'.



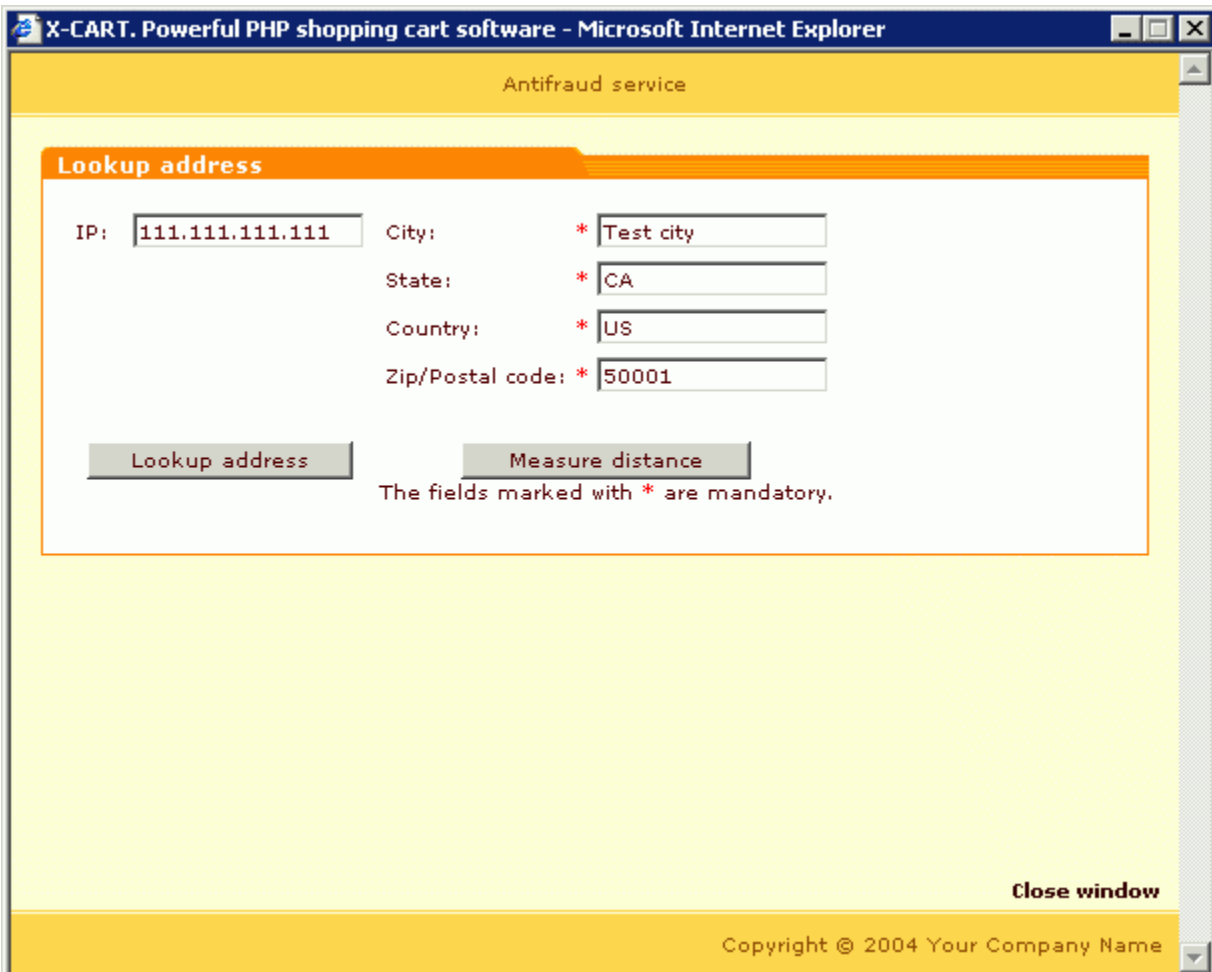
The screenshot shows a web form with the following elements:

- A dropdown menu at the top left showing "Queued".
- A label "Tracking number:" followed by an empty text input field.
- A label "IP:" followed by the IP address "111.111.111.111".
- A "Lookup" button positioned below the IP address.
- A section header "Order details (not visible to customer and provider):" followed by a "Customer notes:" label and a large, empty text area with a vertical scrollbar on the right.

The sequence of four decimal numbers separated by dots that is displayed in this section is the IP address from which the order originated.

To look up a customer's location by his or her IP address and to find out, how far this location is from your company location:

1. Click on the **Lookup** button below the customer's IP address in the 'Order details' form. A window will be opened with a dialog titled 'Lookup address'.



The screenshot shows a web browser window titled "X-CART. Powerful PHP shopping cart software - Microsoft Internet Explorer". The main content area is titled "Antifraud service" and contains a "Lookup address" dialog box. The dialog box has a title bar "Lookup address" and contains the following fields:

IP:	<input type="text" value="111.111.111.111"/>	City:	<input type="text" value="* Test city"/>
		State:	<input type="text" value="* CA"/>
		Country:	<input type="text" value="* US"/>
		Zip/Postal code:	<input type="text" value="* 50001"/>

Below the fields are two buttons: "Lookup address" and "Measure distance". A note below the buttons states: "The fields marked with \* are mandatory." In the bottom right corner of the dialog box, there is a "Close window" button. At the bottom of the browser window, the text "Copyright © 2004 Your Company Name" is visible.

In the 'Lookup address' dialog, the fields 'City', 'State', 'Country' and 'Zip/Postal code' will show the address of your company as provided under General settings->Company options, the 'IP' field will show the IP address of your customer.

2. Click the **Lookup address** button. This should induce Antifraud service to find out the actual location of the computer whose IP address is provided. The address received from Antifraud service will appear below the 'IP' field:



Antifraud service

**Lookup address**

IP:	<input type="text" value="111.111.111.111"/>	City:	* <input type="text" value="Test city"/>
City	La Verne	County:	* <input type="text" value="CA"/>
County	CA	Country:	* <input type="text" value="US"/>
Country	US	Postal code:	* <input type="text" value="50001"/>
Postal code	Unknown		

The fields marked with \* are mandatory.

[Close window](#)

Copyright © 2004 Your Company Name

This should be the location of your customer at the time of order placement.

3. After having Antifraud service look up the actual location of the computer from which the order was placed, click the **Measure distance** button. Antifraud will calculate the distance between the two locations:

Antifraud service

**Lookup address**

IP:	<input type="text" value="111.111.111.111"/>	City:	* <input type="text" value="Test city"/>
City	La Verne	County:	* <input type="text" value="CA"/>
County	CA	Country:	* <input type="text" value="US"/>
Country	US	Postal code:	* <input type="text" value="50001"/>
Postal code	Unknown		

Distance: 2340 km

The fields marked with \* are mandatory.

Copyright © 2004 Your Company Name

If you would like to use some other address instead of your company location (for example, the address provided by the customer as his billing address), simply type the desired address into the address fields of the 'Lookup address' dialog and click the **Measure distance** button.

If you are sure that the IP address from which the order originated was used by a malicious person, 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, then click on **Send**.

Send the IP address from which this order originated to the Antifraud service server to inform that this IP was used by a fraudster. This will help to avoid further fraudulent orders coming from this IP.

Please describe the reason why you report this IP as a source of fraudulent orders:

## 8.3 Bestsellers

### What Bestsellers module does

The module Bestsellers helps you inform your customers about the most popular products in your store. When you enable this module, a special section - 'Bestsellers' - is added to the storefront. This section displays a list of bestsellers - products which have been sold the most often since the module was enabled (or, if there have not been any sales yet, products which have been viewed the greatest number of times) A product is considered sold when the order that includes this product gets the status 'processed'.

The section 'Bestsellers' is visible on the Customer area main page and category pages. When shown on the main page, this section displays the absolute bestsellers of your store, which can be products from any of the store categories. When shown on a category/subcategory page, the 'Bestsellers' section shows a list of best selling products of the current category/subcategory. The module settings provide you the ability to define the location of the 'Bestsellers' section on the store pages. It may be displayed either in the central area of the Customer zone:

The screenshot displays the X-Cart software interface. At the top, there is a navigation bar with the X-Cart logo, a search bar, and buttons for HOME, SHOPPING CART, and CONTACT US. Below the navigation bar, there is a search bar with a "Go" button and a "Select language" dropdown menu set to "English".

The main content area is divided into several sections:

- Categories:** A sidebar menu listing various product categories such as Books, CD - DVD - Video, Computer hardware, Electronics, Games and toys, Household, Men's clothes, Software, and Sport.
- Manufacturers:** A sidebar menu listing manufacturers like ExampleBooks and ExampleHousehold.
- Special:** A sidebar menu listing special offers like Gift certificates and Search for events.
- Help:** A sidebar menu listing help resources like Contact us, Privacy statement, and Terms & Conditions.

The central content area features a "Bestsellers" section with a list of products:

- Baldur's Gate II Add On:** Our price: \$40.00
- Lord of the Rings Board Game:** Our price: \$34.99
- New Masters of Flash:** Our price: \$59.99
- Photoshop 6 Down and Dirty Tricks:** Our price: \$59.99
- Palm OS M125:** Our price: \$399.00

A yellow callout box points to the "Bestsellers" section with the text: "Bestsellers list displayed in the central area of the store's main page".

The right-hand navigation column contains several sections:

- Your cart:** A section indicating "Cart is empty" and providing links for View cart, Checkout, Wish list, Gift Registry, Modify profile, Delete profile, Orders history, and Returns.
- Authentication:** A section showing "customer is logged in !" and a "Log out" button with a "Go" icon. It also includes a note: "If Javascript is disabled in your browser click here".
- Affiliates:** A section with a link: "Click here to register as an affiliate".

or in the sidebar (menu column) of the Customer zone:



## Roles in Bestsellers module management

If you are an X-Cart GOLD administrator/provider or an X-Cart PRO administrator:

- You can enable/disable Bestsellers module and adjust its configuration settings (Check out [Enabling and Configuring 'Bestsellers'](#))

### 8.3.1 Enabling and Configuring 'Bestsellers'

To begin using the module:

1. Enable Bestsellers module (Administration menu->Modules).

When the module is enabled, you can see: Bestsellers options section in General settings/Modules options.

2. Adjust the module settings via General settings/Modules options->Bestsellers options:

The screenshot shows a web interface for configuring 'Bestsellers options'. It features a title bar 'General settings' in orange, followed by a sub-header 'Bestsellers options'. Below this, there are three configuration rows: 1) 'Number of products in bestsellers list:' with a text input field containing the number '5'. 2) 'Show thumbnails in bestsellers list:' with a checked checkbox. 3) 'Show bestsellers list in the menu column:' with a checked checkbox. At the bottom left of the panel is a 'Save' button.

- a) Use the 'Number of products in bestsellers list' field to specify the number of product titles you wish to be displayed in the 'Bestsellers' section.
- b) If you wish product thumbnail images to be included into your bestsellers list along with product titles, select the 'Show thumbnails in bestsellers list' check box.

**Note:** Thumbnail images can only be displayed when the 'Bestsellers' section is located in the central area of a store page.

- c) Use the 'Show bestsellers list in the menu column' check box to specify the location of your bestsellers list: if you want the 'Bestsellers' section to be displayed in the menu column, select the check box; if you want the 'Bestsellers' section to be displayed in the central area of a store page, leave the check box unselected.
  - d) Click on **Save**.
3. Enable the module Advanced Statistics (Advanced Statistics module gathers statistics on product views and product sales for Bestsellers module; Bestsellers list is displayed only after Advanced Statistics module have registered some product views or sales).

## 8.4 Customer Reviews

### What Customer Reviews module does

The module Customer Reviews allows your customers to post feedback about the products in your store. For this purpose, a special form is added onto the product details page of every product - 'Customer feedback'.



Two types of customer feedback are supported: *product ratings* and *customer reviews*. Respectively, the 'Customer feedback' form includes two sections: 'Product rating' and 'Customer reviews'.

The 'Product ratings' section allows customers to evaluate a product based on a 5 point scale, the choice *Excellent* corresponding to the highest rating of 5 points, *Poor* - to the lowest rating of 1 point:

**Customer feedback**

**Product rating**

Voting  **Rate It!**

**Customer Reviews**

There have been no reviews for this product.

**Add your review here**

Your name:

Your message:

**Add review**

The 'Customer Reviews' section allows customers to post their own reviews of a product:

**Customer feedback**

**Product rating**

Voting  **Rate It!**

**Customer Reviews**

There have been no reviews for this product.

**Add your review here**

Your name:

Your message:

**Add review**

Ratings of a product by different customers are summed up, so the resultant rating of a product represents a simple average of its ratings by all the customers who have voted. Rating points are represented by stars, and as soon as a product gets rated by somebody, all the store visitors can see its rating in the 'Product rating' section.

Customer reviews created by your customers are posted for everyone to see in the 'Customer Reviews' section. Each review can be accompanied by the name of the author and the author's email address.





**Customer feedback**

**Product rating**

Product rating ★★★★★

Voting  **Rate It!**

**Customer Reviews**

**Author: John Smith (j\_smith@example.com)**  
Great item exactly as described, fast delivery. Highly recommended!

**Add your review here**

Your name:

Your message:

**Add review**

If your store prefers to use just one of the above described types of customer feedback, the store administrator can disable any of the two sections of the 'Customer feedback' form.

You can control which of the store site visitors (*all visitors* or *only registered customers*) should be allowed to post reviews, or you can choose to forbid creation of feedback posts by visitors and create all reviews by yourself.

## Roles in Customer Reviews module management

If you are an X-Cart GOLD administrator/provider or an X-Cart PRO administrator:

- You can enable/disable Customer Reviews module and adjust its configuration settings (Check out [Enabling and Configuring 'Customer Reviews'](#)).
- You can fully control product ratings: view all product ratings in your store/all ratings of a specific product/all ratings posted from a specific IP; change ratings posted by any visitors; delete undesirable ratings (See [Managing Product Ratings](#)).
- You can control customer reviews: edit reviews posted by customers, delete unwanted reviews and add reviews of your own (See [Managing Customer Reviews](#)).

## 8.4.1 Enabling and Configuring 'Customer Reviews'

To begin using the module:

1. Enable Customer Reviews module (Administration menu->Modules).

When the module is enabled, you can see: Customer Reviews options section in General settings/Modules options.

2. Adjust the module settings via General settings/Modules options->Customer Reviews options:



The screenshot shows a web interface for configuring the 'Customer Reviews' module. The window title is 'General settings'. Below it, the section is titled 'Customer reviews options'. There are three rows of settings:

Enable 'Product rating' section:	<input checked="" type="checkbox"/>
Enable 'Customer reviews' section:	<input checked="" type="checkbox"/>
Allow adding reviews (N - disallow to all, A - allow to all, R - allow to registered):	<input type="text" value="Allow to all"/>

At the bottom left of the settings area is a 'Save' button.

- a) Specify whether you want to enable your customers to rate products: select the "Enable 'Product rating' section" check box to enable product ratings, unselect the check box to hide the 'Product rating' section from the 'Customer Feedback' form.
- b) Specify whether you want to enable your customers to create reviews and view reviews by other customers: select the "Enable 'Customer reviews' section" check box to enable customer reviews, unselect the check box to hide the 'Customer reviews' section from the 'Customer Feedback' form.
- c) Specify who can create reviews: select *Allow to all*, *Disallow to all* or *Allow to registered* from the 'Allow adding reviews' selectbox.
- d) Click on **Save**.

## 8.4.2 Managing Product Ratings

### Viewing product ratings from the administration back-end

You can obtain comprehensive information about the product ratings posted by your customers via the 'Edit ratings' section of the the administration back-end of your store (Management menu->Edit ratings). As soon as you enter this section, you see a dialog box titled 'Ratings':

**Ratings**

**All ratings:**

[Check all](#) / [Uncheck all](#)

	<u>SKU</u>	<u>PRODUCT</u>	<u>REMOTE IP</u>	<u>VOTE</u>
<input type="checkbox"/>	SKU92	Cranium	192.0.34.166	Excellent!
<input type="checkbox"/>	SKU196	Lamp	192.0.34.166	Poor
<input type="checkbox"/>	SOCBALL01	Brine ATTACK Soccer Ball	192.0.34.166	Excellent!
<input type="checkbox"/>	SKU16130	Pocket T (summer colors)	192.0.34.166	Very good

This box displays all the product ratings in your store. For each rating the following information is available: the column PRODUCT shows the title of the product rated, the column SKU shows the product's SKU, the column REMOTE IP shows the IP address of the customer who rated the product, the column VOTE shows the customer's evaluation of the product. The list of product ratings can be sorted in different ways by clicking on the column headers.

If you want to view ratings for a specific product only, click on the title of this product in the 'Ratings' dialog box. With regard to the screenshot above, clicking on the product title 'Cranium' will produce the following:

**Ratings**

**Ratings for product 'Cranium'** ([Show all ratings](#))

[Check all](#) / [Uncheck all](#)

	<u>SKU</u>	<u>PRODUCT</u>	<u>REMOTE IP</u>	<u>VOTE</u>
<input type="checkbox"/>	SKU92	Cranium	192.0.34.166	Excellent!

To see all ratings posted from a specific IP, click on the corresponding IP address in the 'Ratings' dialog box. In our example, clicking on the IP '192.0.34.166' will produce the following:

**Ratings**

**Ratings for IP '192.0.34.166'** ([Show all ratings](#))

---

[Check all](#) / [Uncheck all](#)

	<u>SKU</u>	<u>PRODUCT</u>	<u>REMOTE IP</u>	<u>VOTE</u>
<input type="checkbox"/>	<b>SKU92</b>	<a href="#">Cranium</a>	<a href="#">192.0.34.166</a>	Excellent! ▾
<input type="checkbox"/>	<b>SKU196</b>	<a href="#">Lamp</a>	<a href="#">192.0.34.166</a>	Poor ▾
<input type="checkbox"/>	<b>SOCBALL01</b>	<a href="#">Brine ATTACK Soccer Ball</a>	<a href="#">192.0.34.166</a>	Excellent! ▾
<input type="checkbox"/>	<b>SKU16130</b>	<a href="#">Pocket T (summer colors)</a>	<a href="#">192.0.34.166</a>	Very good ▾

To return to the list where all ratings can be seen, click the **Show all ratings** link in the upper part of the box.

## Editing product ratings

Too many negative ratings given to a product by customers can undermine the product's reputation, which can have negative impact on your store's sales. Customer Reviews module allows you to deal with this problem by editing your customers' ratings. If you are not satisfied with a rating given to any of your products by a customer, you can change this rating manually via the 'Edit ratings' section of the the administration back-end.

To edit a product rating:

1. Find the rating to be edited in the list of product ratings in the 'Ratings' dialog box.
2. Select a desired rating from the drop-down box in the VOTE column.
3. Click on **Update**.

The rating should be saved with the selected value of the VOTE drop-down box.

## Deleting product ratings

Customer Reviews module allows you to delete product ratings.

To delete one or more ratings:

1. Find the ratings to be deleted in the list of product ratings in the 'Ratings' dialog box.

2. Mark the found ratings for deletion by selecting the check boxes next to them.
3. Click on **Delete selected**.

The ratings should be removed from the list of ratings in the 'Ratings' dialog box; the number of points corresponding to the product rating should be recalculated (may affect the number of stars).

## 8.4.3 Managing Customer Reviews

### Viewing customer reviews from the administration back-end

You can view customer reviews for any product without leaving the administration back-end.

To view customer reviews for a specific product:

1. Find the product for which you want to view customer reviews.
2. Open this product for modification.
3. In the 'Product Management' section menu, click the link 'Customer Reviews'. A dialog box titled 'Edit reviews' should be opened.

The 'Edit reviews' dialog box is the place where all the reviews regarding the product being viewed can be seen. Before your store visitors have posted any feedback, the reviews section of the 'Edit reviews' box is empty:

AUTHOR	MESSAGE
No reviews for this product	

[Add new review](#)

Then, as your store visitors begin posting reviews, reviews form a list in the upper part of the 'Edit reviews' dialog box:

**Edit reviews**

	AUTHOR	MESSAGE
<input type="checkbox"/>	John Smith (j_smith@example.com)	Great item exactly as described, fast delivery. Highly recommended!
<input type="checkbox"/>	Jane Doe (jane_doe@example.com)	Excellent quality!

**Add new review**

## Adding customer reviews from the administration back-end

You can use the 'Edit reviews' dialog box to add reviews of your own directly from the administration back-end.

To add a review:

1. Find the product for which you want to add a customer review. Open this product for modification.
2. Open the 'Edit reviews' dialog box for this product.
3. Use the 'Add new review' section of the 'Edit reviews' dialog box to create a new review:
  - a) Use the AUTHOR field to enter your name and, optionally, your e-mail address.
  - b) Use the MESSAGE field to enter the text of your review.
  - c) Click on **Add/Update**.

Your review should be added to the list of customer reviews both in the customer zone and the administration back-end.

## Editing customer reviews

You can edit any reviews created by your customers.

To edit a customer review:

1. Find the product for which you want to edit a customer review. Open this product for modification.
2. Open the 'Edit reviews' dialog box for this product.
3. Find the review you would like to edit in the list of customer reviews for this product.
4. Edit the review (If necessary, you can change the contents of both the AUTHOR and MESSAGE fields).
5. Click on **Add/Update**.

The edited review should be updated both in the customer zone and the administration back-end.

### Deleting customer reviews

Customer Reviews module allows you to delete abusive posts and any inappropriate content which might be posted to your store website via the 'Customer Reviews' section of the 'Customer Feedback' form.

To delete one or more reviews with undesirable content:

1. Find the product whose customer reviews you want to delete. Open this product for modification.
2. Open the 'Edit reviews' dialog box for this product.
3. Find the reviews to be deleted in the list of customer reviews for this product.
4. Mark the found reviews for deletion by selecting the check boxes next to them.
5. Click the **Delete selected** button.

The reviews should be removed from the list of customer reviews both in the customer zone and the administration back-end.

## 8.5 Detailed Product Images

### What Detailed Product Images module does

Detailed Product Images module allows you to use an unlimited number of images with each product. The images can be any size.

## Roles in Detailed Product Images module management

If you are an X-Cart GOLD administrator/provider or an X-Cart PRO administrator:

- You can enable/disable Detailed Product Images module and adjust its configuration settings (Check out [Enabling and Configuring 'Detailed Product Images'](#)).
- You can add detailed product images (See [Adding Detailed Images](#)).
- You can manage detailed product images (See [Managing Detailed Images](#)).

If you are an X-Cart PRO provider:

- You can add detailed product images (See [Adding Detailed Images](#)).
- You can manage detailed product images (See [Managing Detailed Images](#)).

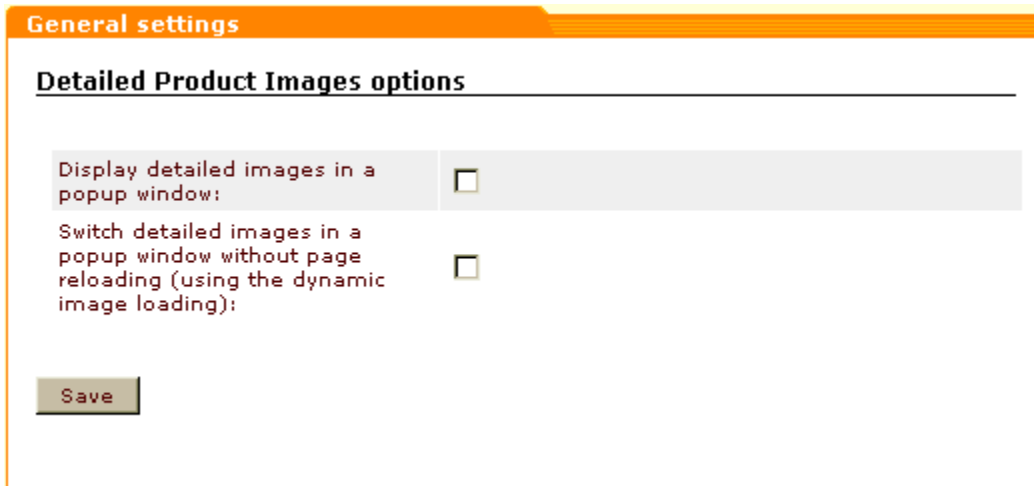
### 8.5.1 Enabling and Configuring 'Detailed Product Images'

To begin using the module:

1. Enable Detailed Product Images module (Administration menu->Modules).

When the module is enabled, you can see: Detailed Product Images options section in General settings/Modules options.

2. Adjust the module settings via General settings/Modules options->Detailed Product Images options:



**General settings**

**Detailed Product Images options**

Display detailed images in a popup window:

Switch detailed images in a popup window without page reloading (using the dynamic image loading):

Save

- a) Specify whether you want detailed product images to be displayed in a popup window.
- b) Specify whether you want to use dynamic image loading for detailed product images that will be displayed in a popup window.
- c) Click on **Save**.



## 8.5.2 Adding Detailed Images

To add a detailed image:

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. This should open a dialog box titled 'Detailed images'.

**Detailed images** [Top](#)

IMAGE	POS.	AVAILABILITY	ALTERNATIVE TEXT	IMAGE PROPERTIES
No images				

**Add new detailed image**


**Preview:** No image Available

Select a file:

Alternative text:

3. Select an image to be uploaded:
  - a) In the 'Add new detailed image' section of the 'Detailed images' dialog box, click on **Browse**. A dialog box titled 'Image selection' will appear in a new window.
  - b) In the 'Image selection' dialog box, specify the location of the image that needs to be uploaded (Use an appropriate **Browse** button if the image file is located on the server or on your local computer, or enter the image URL if the image file is located on the Internet).
  - c) Click on **Apply**. The desired image should appear in the 'Preview' subsection.
4. Click on **Upload**. The image should be added to the list of the product's detailed images.

Detailed images

IMAGE	POS.	AVAILABILITY	ALTERNATIVE TEXT	IMAGE PROPERTIES
<input type="checkbox"/> 	0	Enabled ▾		JPEG, 244x250, 17270b
<input type="button" value="Update"/>		<input type="button" value="Delete selected"/>		

Add new detailed image

**Preview:** No image Available

Select a file:

Alternative text

5. If necessary, change the details of the added detailed image:

- a) Set a position number for the detailed image (relative to the other detailed images of the same product).
- b) Enter alternative text for the image (will be shown in the place of the image if images are disabled in the web browser).
- c) Use the 'Availability' selectbox to specify whether the image should be displayed on the storefront or not.
- d) Click on **Update**.

## 8.5.3 Managing Detailed Images

### Editing the details of detailed images

You can change the position of a detailed image relative to the other detailed images of the same product, edit the alternative text defined for a detailed image and change a detailed image's availability status.

To edit the details of a detailed image:

1. Find the product whose detailed image you wish to edit. 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 should be opened.

3. Find the necessary detailed image in the list of the product's detailed images.
4. Change the necessary image details:
  - a) Enter a desired position number into the appropriate box in the 'POS.' column.
  - b) Edit the image's alternative text ('ALTERNATIVE TEXT' column).
  - c) Use the 'AVAILABILITY' drop-down box to specify whether the image should be displayed on the storefront or not.
5. Click on **Update**.

### Deleting detailed images

Detailed images which you no longer want to use can be deleted.

To delete a detailed image:

1. Find the product whose detailed image you wish to delete. 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 should be opened.
3. Find the necessary detailed image in the list of the product's detailed images.
4. Select the check box next to the image.
5. Click the **Delete selected** button.

## 8.5.4 Viewing Detailed Images

When detailed images have been uploaded, they can be viewed in the Customer Zone. A Click to enlarge link is displayed below the product thumbnail image if the 'Display detailed images in a popup window' option has been enabled on the 'Detailed Product Images' module configuration page. If the option has been disabled, the detailed images are displayed in a special section at the bottom of the product details page.

### Bach's Goldberg Variations



[Click to enlarge](#)

As the legend goes, *Bach's Goldberg Variations* were written for an insomniac diplomat patron who desired music to help cheer him on lonely, sleepless nights. But the real legend is how Bach was able to produce, for an apparently throwaway occasion, one of the crowning masterpieces not only of the Baroque, but of all Western music. Here's a gathering of widely varied interpretations the music has inspired, from keyboard masters to arrangements for string orchestra, jazz trio, and even brass band.



#### Details

SKU	SKU76
Quantity in stock	99 item(s) available
Weight	1.00 lbs
<b>Price:</b>	<b>\$13.99</b> (€ 12.17)

#### Options

Quantity

[Add to cart](#)

## 8.6 Discount Coupons

### What Discount Coupons module does

The module Discount Coupons allows you to use discount coupon codes in your store. A discount coupon code is a secret code which a customer can use to get a discount when making a purchase. Discount coupon codes are issued by product providers and can be distributed in any way the provider finds convenient (for example, through mail, site news or advertisements on other sites).

When Discount Coupons module is enabled, a section titled 'Redeem a discount coupon' is provided on the cart page:

## Your shopping cart

The items below are currently in your shopping cart. To remove any item click "Delete item". To checkout, please click "Checkout". Please note that Delivery method is ignored if you are ordering Gift Certificates or Electronically distributed products.

### Items



#### Bach's Goldberg Variations

**Composer:** Johann Sebastian Bach  
**Performer:** Murray Perahia

\$13.99 x  = \$27.98 (€ 24.34)

Delete item 

**Subtotal:** \$27.98 (€ 24.34)

**Shipping cost:** n/a

**TOTAL:** \$27.98 (€ 24.34)

**Note:** Order total will be calculated more exactly after you log in.

Update  Clear cart 

Checkout 

If you have a valid discount coupon, you can enter it below, the store will deduct the discount amount from your total order.

### Redeem a discount coupon

Coupon code

Submit 

After adding all the desired products to the shopping cart, a customer can use this section to enter a coupon code. When a code is entered, X-Cart checks if it is valid and if the order to which the code is being applied meets the requirements defined by the provider. If all is well, the coupon code discount gets applied to the order: the coupon discount amount is subtracted from the order subtotal or, if a global discount is applied, from the result of the subtraction of the global discount from the subtotal. The customer can see the result of application of the discount coupon on the cart page:

### Your shopping cart

The items below are currently in your shopping cart. To remove any item click "Delete item". To checkout, please click "Checkout". Please note that Delivery method is ignored if you are ordering Gift Certificates or Electronically distributed products.

**Items**



**Bach's Goldberg Variations**

**Composer:** Johann Sebastian Bach  
**Performer:** Murray Perahia

**\$13.99** x  = **\$27.98** (€ 24.34)

**Delete item** 

---

<b>Subtotal:</b>	<b>\$27.98</b> (€ 24.34)
<b>Discount coupon</b>  :	<b>\$2.00</b> (€ 1.74)
<b>Discounted subtotal:</b>	<b>\$25.98</b> (€ 22.60)
<b>Shipping cost:</b>	<b>n/a</b>
<hr style="border: 0.5px solid #ccc;"/>	
<b>TOTAL:</b>	<b>\$25.98</b> (€ 22.60)

**Note:** Order total will be calculated more exactly after you log in.

**Update** 
**Clear cart** 
**Checkout**

If the customer is satisfied with the discount being given, he or she can proceed to checkout, as usual. Customers who, by this time, have changed their mind about using the coupon code can cancel the application of the discount by clicking the red cancel button in the 'Discount coupon' line.

Any X-Cart provider can create an unlimited number of discount coupons.

Please note that in X-Cart PRO-based stores with more than one providers discounts are applied within the boundaries of specific provider product sets.

## Roles in Discount Coupons module management

If you are an X-Cart GOLD administrator/provider:

- You can enable/disable the module Discount Coupons (Administration menu->Modules).
- You can create discount coupons (Check out the section [Adding Discount Coupons](#)).
- You can view information about your discount coupons, disable/enable any of your discount coupons, as well as delete any of your discount coupons (For details, see [Managing Existing Discount Coupons](#)).

---

If you are an X-Cart PRO administrator:

- You can enable/disable the module Discount Coupons (Administration menu->Modules).

If you are an X-Cart PRO provider:

- You can create discount coupons (Check out the section [Adding Discount Coupons](#)).
- You can view the details of your discount coupons, disable/enable any of your discount coupons, as well as delete any of your discount coupons (For details, see [Managing Existing Discount Coupons](#)).
- You cannot view the details of the discount coupons created by any other providers, unless you are a root provider.

## 8.6.1 Adding Discount Coupons

A provider is allowed to create an unlimited number of discount coupons.

To add a discount coupon:

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

Store coupons

COUPON	STATUS	DISC.	MIN.	TIMES	EXPIRES
No discount coupons defined					

### Add new coupon

---

**Coupon code:** \*

**Coupon type:**

**Discount:** \*

**Times to use:**   Per customer

**Status:**

**Expires:**

**Apply discount if:**

Order subtotal equals or exceeds the amount of... (\$)

Cart contains the product...

Cart contains products from the category...

and its subcategories

**Note:** "Free shipping" type coupon applies to the entire cart if one or more products in cart or the order subtotal meet the conditions upon which the coupon should be applied.

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

- **Coupon code** - The coupon code that a customer will be supposed to enter into the 'Discount coupon form' at the time of placing an order.
- **Coupon type** - Type of discount/bonus that a customer will be able to get (*\$ off*, *% off*, *Free shipping*).
- **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.
- **Times to use** - The number of times that the coupon code will be accepted by your store (Select the check box 'Per customer' to specify that the number of usage times is counted per logged in customer).

Let's say, you create a coupon with the following parameters:

**Times to use:**   Per customer

This means that the coupon can be used one time and one time only - after one customer uses it, no



other customer may use it.

Let's say, you create a coupon with the following parameters:

**Times to use:**   **Per customer**

This means that the coupon can be used by any number of customers, but only one time per logged in customer.

- **Status** - Coupon status (*Active, Disabled, Used*). You can activate the coupon at the time of creation or later. Your customers will be able to use the coupon only if its status is *Active*.
- **Expires** - Coupon expiration date.
- **Apply discount if** - Conditions defining the type of orders to which the coupon may be applied. Select one of the three options:
  - a) Order subtotal equals or exceeds the amount of... (Enter the desired order subtotal amount)
  - b) Cart contains the product... (Use the **Browse** button to select the desired product)
  - c) Cart contains products from the category (Use the drop-down box to select a category. To include subcategories, select the appropriate check box).

3. Click on **Add coupon**.

## 8.6.2 Managing Existing Discount Coupons

### Changing discount coupon statuses

To change the status of an existing coupon:

1. Go to the 'Store Coupons' section (Inventory menu->Coupons). You should see a form titled 'Categories'. Click on Coupons in the Inventory menu, the 'Store coupons' form will appear.

### Store coupons

Check all / Uncheck all

	COUPON	STATUS	DISC.	MIN.	TIMES	EXPIRES
<input type="checkbox"/>	<b>FLASH</b>	Active	\$5.00	\$0.00	0/10	15-12-2005 15:36:03
This coupon applies to orders which contain product <b>#10</b> Discount is applied once per order						
<input type="checkbox"/>	<b>FLASH2</b>	Active	\$5.00	\$0.00	0/10	15-12-2005 15:36:03
This coupon applies to orders which contain product <b>#10</b> Discount is applied to each item of this product						
<input type="checkbox"/>	<b>CD</b>	Active	\$2.00	\$0.00	0/10	15-12-2005 15:36:03
This coupon applies on orders which contain product(s) from category <b>#105</b> Discount is applied once per order						
<input type="checkbox"/>	<b>CD2</b>	Active	\$5.00	\$0.00	0/10	15-12-2005 15:36:03
This coupon applies on orders which contain product(s) from category <b>#105</b> Discount is applied to each product item ordered from this category						

---

### Add new coupon

Coupon code: \*

Coupon type:

**Note:** "Free shipping" type coupon applies to the entire cart if one or more products in cart or the order subtotal meet the conditions upon which the coupon should be applied.

2. Find the coupon whose status you need to change.
3. Select the necessary status from the STATUS drop-down box (*Active* - available for use by customers, *Used* - redeemed, *Disabled* - expired or blocked for some other reason).
4. Click on **Update**.

## Deleting discount coupons

To delete used or expired coupons:

1. Go to the 'Store Coupons' section (Inventory menu->Coupons).
2. Find the coupon you wish to delete.
3. Select the check box next to it.
4. Click the **Delete selected** button.

## 8.7 Egoods

### What Egoods module does

The module Egoods enables you to sell software and any other goods whose delivery needs to be done using ESD method.

When Egoods module is enabled, a field 'ESD distribution' is added to the 'Product details' form. When creating ESD products in X-Cart, you will use this field to specify the location from which your customers will be able to download each of the products.

The screenshot shows a web form for adding a product. At the top, there is an 'Availability:' dropdown menu set to 'Available for sale'. Below this is a section titled 'Details' with a red underline. The form contains several input fields: 'SKU:' with the value 'SKU83', 'Product name:' with 'ViaVoice Pro 7.0 Millennium Edition', 'Search keywords:' which is empty, and 'ESD distribution:' with the path '/provider/via\_voice\_70.' and a 'Browse...' button. The 'Short description\*:' field contains HTML-formatted text: '<b>Features:</b><ul type="disc"><li>Use voice commands to control and navigate your desktop, applications, and the Internet</li><li>Input, edit, and format text by voice using Microsoft Word 97 and 2000; Microsoft Excel 97 and 2000; and Microsoft Outlook 97, 98, and 2000</li><li>Explore specialized topics such as Cuisine, Chatters'.

Downloadable products can be located either on the same server as your online store (*preferable*) or on a different server. For files located on the store server, the location should be specified as a filepath; for files

located on any other servers, the location should be specified as a URL.

**Note:** Make sure you do not use spaces in the names of ESD products because in this case customers will not be able to download the files.

ESD product files can be uploaded onto the server where X-Cart is installed using X-Cart's file manager ('Files' section of the store back-end). Accordingly, ESD files of X-Cart GOLD administrator/providers and of X-Cart PRO administrators will be kept within the directory `/files`, files of X-Cart PRO providers - within the corresponding `/files/provider_login` directories.

Please note that X-Cart will not allow you to upload files larger than 2 Mb via its interface. Large files can be uploaded to the `/files` or `/files/provider_login` directories directly.

**Important:** Be sure to protect your ESD products from unauthorized download. On an Apache web server, the `/files` directory can be protected by an `.htaccess` file with a 'Deny from all' directive; on IIS, reading from the `/files` directory can be disabled via the 'Access permissions' dialog box.

When an order containing an ESD product is processed, an email letter with a download key (a link like '<http://www.example.com/xcart/download.php?id=920e98f7d889eb7781a>') is sent to the email address of the customer who placed the order. The customer then uses this link to download the purchased product.

**Note:** Download keys are generated automatically and are valid for a limited period of time. You can set the time period during which your download keys should be valid using the 'Download key TTL' field in General settings/Modules options->Egoods options.

## Roles in Egoods module management

If you are an X-Cart GOLD administrator/provider or an X-Cart PRO administrator:

- You can enable/disable Egoods module and adjust its configuration settings (See [Enabling and Configuring 'Egoods'](#)).
- You can upload files of ESD products to the `/files` directory on X-Cart server.
- You can specify the location of downloadable products in the 'Product details' of these products.

If you are an X-Cart PRO provider:

- You can upload files of ESD products to the `/files/your_login` directory on X-Cart server.
- You can specify the location of downloadable products in the 'Product details' of these products.

## 8.7.1 Enabling and Configuring 'Egoods'

To begin using the module:

1. Enable Egoods module (Administration menu->Modules).

When the module is enabled, you can see: Egoods options section in General settings/Modules options.

2. Adjust the module settings via General settings/Modules options->Egoods options:

**General settings**

**Egoods options**

Download key TTL (hours):

Forcedly to turn on Manual CC processing if the cart contains EGoods:

**Save**

- a) Use the 'Download key TTL (hours)' field to specify a time period for which a download key sent to a customer of a ESD product should be valid.
- b) If your store uses online credit card processing, but you wish to use manual credit card processing for all orders containing ESD products, select the 'Forcedly to turn on Manual CC processing if the cart contains EGoods' check box.
- c) Click on **Save**.

## 8.8 Extra Fields

### What Extra Fields module does

If you think the 'Product details' form used in X-Cart to provide information about products is lacking some fields, you should consider using X-Cart's Extra Fields module. This module allows you to create custom fields for the 'Product details' form.

For example, the module can be used to add 'Author' or 'ISBN' fields to a product that is a book:

**Product details**

**Product thumbnail**

**Thumbnail**  
(recommended size 50x50-150x150)



**Details**

**SKU:**

**Product name:**

**Description\* :**

**Free shipping**

**Shipping freight (\$)**

**Apply global discounts**

**ISBN**

**Author**

Extra fields



X-Cart supports product search by extra fields both in Customer zone and in the store back-end, so putting information by which a product is likely to be searched for in extra fields can facilitate finding products.

To enable search by extra fields in Customer zone, go to Administration -> General settings -> Product search options and enable search by the required fields. Check boxes "Search also in: %EXTRA\_FIELD\_NAME%" appear in Customer zone.

If a customer selects such a check box, search will also be conducted

## Roles in Extra Fields module management

If you are an X-Cart GOLD administrator/provider:

- You can enable/disable Extra Fields module and adjust its configuration settings (See [Enabling and Configuring 'Extra Fields'](#)).
- You can create extra fields and define their values for any products in the store (See [Adding Extra Fields](#) and [Assigning Values to Extra Fields](#)).
- You can edit and delete any extra fields (See [Managing Extra Fields](#)).
- You can define which extra fields need to be included into the product search form (See [Enabling Search by Extra Fields](#)).

If you are an X-Cart PRO administrator:

- You can enable/disable Extra Fields module and adjust its configuration settings (See [Enabling and Configuring 'Extra Fields'](#)).
- You can define which of the extra fields created by the store providers need to be included into the product search form (See [Enabling Search by Extra Fields](#)).
- You can see the extra fields of any product in the store regardless of what provider the product belongs to.

If you are an X-Cart PRO provider:

- You can create extra fields for your products (See [Adding Extra Fields](#)).
- You can define values for the extra fields that you created (Study [Assigning Values to Extra Fields](#)).
- You can view, edit and delete the extra fields that you created (See [Managing Extra Fields](#)).

## 8.8.1 Enabling and Configuring 'Extra Fields'

To begin using the module:

1. Enable Extra Fields module (Administration menu->Modules).
2. If you enable the module in an X-Cart PRO-based store shared by multiple providers, adjust the maximum number of extra fields each provider will be able to define (General settings/Modules options->Extra fields options):

**General settings**

**Extra fields options**

Extra fields limit (per provider):	<input style="width: 60%;" type="text" value="10"/>
Display default values in all extra fields for which non-default values have not been defined:	<input checked="" type="checkbox"/>

Click the **Save** button.

## 8.8.2 Adding Extra Fields

### Creating extra fields

To add an extra field:

1. Go to the 'Extra fields' section of the store back-end (Products menu->Extra fields). You should see a dialog box titled 'Extra fields':

**Extra fields**

FIELD NAME	SERVICE NAME	DEFAULT VALUE	SHOW	ORDERBY
No extra fields defined				

**Add extra field**

---

<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text" value="SERVICE_NAME"/>	<input style="width: 95%;" type="text"/>	<input checked="" type="checkbox"/>	<input style="width: 95%;" type="text"/>
--	---	--	-------------------------------------	--

2. Use the 'Add extra field' subsection of the 'Extra fields' dialog box to provide the details of the new extra field:

**FIELD NAME** - Name of the extra field as it will appear in the store interface (both in the store back-end and in the Customer zone).

**SERVICE NAME** - Unique name by which the application will be able to identify the extra field. This



value will not appear anywhere in the store interface and will be the same for all the store languages.

**DEFAULT VALUE** - Value that will appear in the extra field by default; will not be visible to customers unless saved by administrator or provider as the value of the extra field in the 'Product details' form.

Completion of the **DEFAULT VALUE** field is optional.

**SHOW** - Check box defining the extra field's availability to customers (Selecting the check box makes the extra field visible in the Customer zone. Unselecting the check box hides the extra field from the Customer zone, but leaves it available for editing in the store back-end).

**ORDERBY** - Numeric value defining the position of the extra field on the 'Product details' page (In X-Cart PRO version, the position is defined relative to the other extra fields of the same provider).

3. Click on **Add new**. The extra field should be added to the list of extra fields above. You should see an Information box with a confirmation message.

**Note:** After an extra field is created, it becomes available on the Product details page of every product that you can edit using your current account. However, please be aware that, no matter whether you have defined a default value for an extra field or not, the extra field does not appear on the Product details page of a product in the Customer zone until you visit the Product details page of that product in the store back-end and assign a value to the field or approve the default value. See the chapter [Assigning Values to Extra Fields](#) for details.

## Managing multilingual extra field names

If your store supports more than one languages, you need to provide names for your extra fields in all the languages supported by your store.

To add a name for an extra field in a language other than the default store language:

1. Open the 'Extra fields' dialog box containing a list of your extra fields:

**Extra fields**

[Check all](#) / [Uncheck all](#)

	FIELD NAME	SERVICE NAME	DEFAULT VALUE	SHOW	ORDERBY
<input type="checkbox"/>	author	SERVICE_NAME		<input checked="" type="checkbox"/>	1
<input type="checkbox"/>	ISBN	SERVICE_NAME		<input checked="" type="checkbox"/>	2

---

**Add extra field**

- From the language selector in the top right-hand corner of the 'Extra fields' dialog box, select the language in which you would like to add a field name. There will be a page refresh and you should see the language of the store back-end change to the language you selected.
- Edit the names of the extra fields in the list replacing the values in the FIELD NAME column by field names in the selected language.

**Note:** The value of the FIELD NAME field is the only thing that needs to be changed for specific languages. An extra field's service name, default value, availability and position number remain the same for all the store languages.

- Click the **Update** button to save the changes. The new values should be applied. You should see an Information box with a confirmation message.

### 8.8.3 Assigning Values to Extra Fields

To assign a value to an extra field:

- Find the product for which you wish to define an extra field value and open the product for modification.
- On the 'Product details' page, find the necessary extra field.
- If the field is empty, simply enter the desired value into it. If the field contains a default value, either make sure the default value can be accepted for the field as is or replace it by the necessary value.
- Click on **Save**. The field value will be saved, and you should be able to see it in the Customer zone.

## 8.8.4 Managing Extra Fields

### Editing extra fields

To edit a previously created extra field:

1. In the 'Extra fields' section of the store back-end (Products menu->Extra fields), find the field that needs to be modified.
2. Edit the necessary fields details (field name, service name, default value, availability status or position number).
3. Click the **Update** button. The changes should be applied. You should see an Information box with a confirmation message.

### Deleting extra fields

To delete one or more extra fields:

1. In the 'Extra fields' section of the store back-end (Products menu->Extra fields), find the field(s) you wish to delete.
2. Select the check boxes next to their names.
3. Click the **Delete selected** button. The field(s) should be removed from the list. You should see an Information box with a confirmation message.

## 8.8.5 Enabling Search by Extra Fields

Users of an X-Cart-based store can perform search by extra fields. However, newly created extra fields do not get included into the product search form automatically. To enable search by extra fields, the store administrator needs to enable these fields using the General settings->Product Search options section (See the chapter [Product Search Options](#) of this manual for details).

## 8.9 Fast Lane Checkout

### What Fast Lane Checkout module does

Fast Lane Checkout module provides a more user-friendly and intuitive checkout procedure in X-Cart.

When the Fast Lane Checkout module is enabled, the checkout procedure consists of four steps: 'Your cart', 'Personal details', 'Shipping and payment', and 'Place order'.


When a customer who is not logged in or registered, clicks the **Buy now** button, he can view his cart and select whether he wants to continue shopping or proceed to checkout.

[Continue shopping](#) [Checkout ▶](#)

### Your shopping cart

The items below are currently in your shopping cart. To remove any item click "Delete item". To checkout, please click "Checkout". Please note that Delivery method is ignored if you are ordering Gift Certificates or Electronically distributed products.

#### Items



**Bach's Goldberg Variations**  
**Composer:** Johann Sebastian Bach  
**Performer:** Murray Perahia

\$13.99 x  = **\$13.99** (€ 12.17)

[Delete item](#) ▶

---

**SUBTOTAL:**    **\$13.99** (€ 12.17)

---

[Update](#) ▶    [Clear cart](#) ▶    [Checkout](#)

After clicking on **Checkout** the customer is asked to login or register.



The screenshot shows a checkout process with four steps: **Your cart**, **Personal details**, **Shipping & Payment**, and **Place order**. The **Personal details** section is active and contains two tabs: **Returning customer** and **New customer**.

**Returning customer**

If you already have an account, you can authenticate yourself by filling in the form below. The fields marked with \* are mandatory.

**Login** \*

**Password** \*


**Submit**

**Recover password** >

**New customer**

**New customer?**  
**Click here to register**



When the customer is logged in, he can select the delivery and payment method on 'Shipping & Payment' page.



[Your cart](#)   [Personal details](#)   [Shipping & Payment](#)   [Place order](#)

### Shipping & Payment

#### Shipping & Payment

<h5>Shipping Address</h5> <p>10 Main street Fillmore Oklahoma United States 84631</p> <p><b>Modify</b> </p>	<h5>Delivery method</h5> <p><input checked="" type="radio"/> test_national - 10-15 days (\$1.00)</p>
<h5>Billing Address</h5> <p>10 Main street Fillmore Oklahoma United States 84631</p> <p><b>Modify</b> </p>	<h5>Payment method</h5> <p><input checked="" type="radio"/> <b>Credit Card</b>    Visa, Mastercard, American Express</p> <p><input type="radio"/> <b>Check</b>    Check payment</p> <p><input type="radio"/> <b>Gift Certificate</b></p> <p><input type="radio"/> <b>Phone Ordering</b>    Phone: (555) 555-5555</p> <p><input type="radio"/> <b>Fax Ordering</b>    Fax: (555) 555-5555</p> <p><input type="radio"/> <b>Money Order</b>    US Banks Only</p> <p><input type="radio"/> <b>Purchase Order</b></p>

[Continue](#)

On the last checkout page the customer can view and modify all the information pertaining to the order and, having made sure that everything is correct, click on **Submit order**.

## Roles in Fast Lane Checkout module management

If you are an X-Cart GOLD administrator/provider or an X-Cart PRO administrator:

- You can enable/disable the module Fast Lane Checkout via the Modules section of X-Cart administration back-end (Administration menu->Modules).

## 8.10 Froogle/GoogleBase

### What Froogle/GoogleBase module does

X-Cart's Froogle/GoogleBase module provides a tool that allows you to submit product feeds to Google Base so the products sold by your store can be found by Internet users using Froogle, Google's shopping search engine.

Froogle is an extension of Google dedicated to helping shoppers quickly find products for sale on the Web. Data in Froogle comes from two sources: product feeds submitted by merchants and a crawl of web pages that identifies product offers. A Froogle product feed is a text file containing specially formatted information about the products offered for sale by a store. As a merchant, you can submit information about your products in the form of a product feed so your products get included into Froogle listings. Submitting a product feed to Froogle is free.

X-Cart's Froogle/GoogleBase module facilitates creation and submission of product feeds to Froogle. It pulls data from all of the products in your store database, creates a properly formatted product feed file and uses FTP to submit this file to Google Base. Google Base then places the submitted product information in Froogle.

You also have the option of downloading the product feed file to your local computer for manual submission or other usage.

Regularly submitting product feeds to Froogle ensures that the information about your products in Froogle's listings is accurate and up to date.

### Roles in Froogle/Google Base module management

If you are an X-Cart GOLD administrator/provider or an X-Cart PRO administrator:

- You can enable/disable the module Froogle/GoogleBase and adjust its configuration settings (See [Enabling and Configuring 'Froogle/GoogleBase'](#)).
- You can create Froogle/GoogleBase feeds that will include information about all the products in the store and submit them to Froogle via Google Base or download them onto your local computer (See [Using Froogle/GoogleBase Export](#)).

If you are an X-Cart PRO provider:

- You can create Froogle/GoogleBase feeds that will include information about your products and submit them to Froogle via Google Base or download them onto your local computer (See [Using Froogle/GoogleBase Export](#)).

## 8.10.1 Enabling and Configuring 'Froogle/Google Base'

To begin using the module:

1. Enable Froogle/GoogleBase module (Administration menu->Modules).

When the module is enabled, a section titled Froogle/GoogleBase options appears in General settings/Modules options.

2. Adjust the module settings via General settings/Modules options->Froogle/GoogleBase options:

**General settings**

**Froogle/GoogleBase options**

Froogle/GoogleBase username:

Froogle/GoogleBase password:

Types of currency in which prices on your products need to be displayed in Froogle/GoogleBase. Must be accepted by your store.:

Generate links to the HTTPS part of the store:

Payment methods that need to be listed in Froogle/GoogleBase as available for your products. Must be accepted by your store. Please include at least one of the following: "Cash," "Check," "Visa," "MasterCard," "AmericanExpress," "Discover," or "WireTransfer". If you accept more than one method, separate each method with a comma.:

Additional instructions to explain your payment policies:

How many days the information on your products in Froogle/GoogleBase needs to be considered up-to-date:

- a) Provide the details of the FTP account which you are going to use for uploading data feed to Froogle/GoogleBase: enter your FTP account login and password into the 'Froogle/GoogleBase username' and 'Froogle/GoogleBase password' fields.

*To set up an FTP account for use with Froogle/Google Base:*

1. If you haven't yet done so, set up a Google account and sign in (You can use the 'Sign in' link provided on the <http://base.google.com/> page).



2. Go to the 'Bulk upload files' section (<http://base.google.com/base/bulkuploads>).
3. Follow Google's instructions to create an FTP account (<http://base.google.com/support/bin/answer.py?answer=4005>).

- b) Specify the type of currency in which you wish product prices to be displayed in Froogle. You should select the type of currency that is accepted by your store.
- c) If you wish the customers who will come to your store from Froogle to come directly to the HTTPS part of the store, select the check box 'Generate links to the HTTPS part of the store'.
- d) Specify the payment methods that need to be listed in Froogle/GoogleBase as available for your products. You should only select the payment methods that are actually accepted by your store. Google requires that at least one of the following methods be included: "Cash," "Check," "Visa," "MasterCard," "AmericanExpress," "Discover," or "WireTransfer". If you accept more than one method, the names of the methods should be separated by commas.
- e) Provide additional instructions explaining your payment policies.
- f) Specify, how many days the information about your products submitted to Froogle/GoogleBase needs to be considered up-to-date.
- g) Click on **Save**.

## 8.10.2 Using Froogle/GoogleBase Export

To create a product feed file for Froogle/GoogleBase:

1. Make sure your product thumbnail images are stored on the file system. This is essential because the resultant product feed file will only reference images stored on the file system. If no thumbnail image for a product is found on the file system, the default 'No Image Available' file will be used for the product.
2. Go to the 'Froogle/GoogleBase export' section of the store back-end:
  - a) Open the 'Import/export data' section of the store back-end.
    - (If you are an X-Cart GOLD administrator/provider or an X-Cart PRO administrator): Click on Import/Export in the Administration menu.
    - (If you are an X-Cart PRO provider): Click on Import/Export in the Products menu.
  - b) Click the 'Froogle/GoogleBase export' link in the 'Import/export data' section menu.

You should see a dialog box titled 'Froogle/GoogleBase export'. This dialog box allows you to perform all the operations on Froogle product feeds (creation of product feed files, downloading of product feed files to your local computer or submission of product feeds to Froogle):

**Froogle/GoogleBase export**

Froogle/GoogleBase has some restrictions as to the format of tab-delimited bulk upload (a quote from [http://base.google.com/base/help/tab\\_instructions.html](http://base.google.com/base/help/tab_instructions.html)):

- # Do not include tabs, carriage returns, or new line characters in the attributes. If any of these appear in an attribute, we will not be able to display that item.
- # Do not include HTML tags, comments, and escape sequences. We will try to remove any HTML from your bulk upload, but for best appearance, you should not include HTML.

Because of the above listed restrictions, HTML tags and HTML entities will be stripped from product names, descriptions, keywords and any other types of data being exported to Froogle/GoogleBase.

Select a language to be used for export English ▾

Enter a 3-letter ISO 639.2 language code for the language being used for export (click [here](#) for a listing of ISO 639.2 language codes) eng

Filename username.txt

Export
Download
Upload

3. Select a language to be used for export.
4. Enter a 3-letter ISO 639.2 language code for the language being used for export.
5. Make sure the filename proposed by the 'Filename' field is the name you wish to use for your Froogle product feed file (The filename is defined by default as *username.txt* - based on the Froogle/GoogleBase username you specified in General settings->Froogle/GoogleBase options; however, if you have more than one stores that send product feeds to Froogle, you might want to edit the filename so it includes your store ID - like *yourstoreID\_username.txt*).

**Note:** If the 'Filename' field says *froogle.txt* and you do not see the Upload button, it means you probably failed to provide your FTP account details in General settings / Froogle/GoogleBase options section or the current PHP configuration on your store server does not support FTP. Fix the problem to be able to submit product feeds to Froogle/GoogleBase using the module.

6. Click the **Export** button. The module should create a product feed.

**Note:** The product feed file will be saved to the directory `files` (if you are an administrator user) or to the directory `files/your_provider_name` (if you are a provider user).

You should see an Information box with a confirmation message.

To download the created product feed file onto your local computer, click the **Download** button.

To submit the product feed file to Froogle/Google Base directly, click the **Upload** button.

**IMPORTANT:** Please be aware that Froogle/GoogleBase has some restrictions as to the format of tab-delimited bulk upload. A quote from [http://base.google.com/base/help/tab\\_instructions.html](http://base.google.com/base/help/tab_instructions.html) says:

# Do not include tabs, carriage returns, or new line characters in the attributes. If any of these appear in an attribute, we will not be able to display that item.

# Do not include HTML tags, comments, and escape sequences. We will try to remove any HTML from your bulk upload, but for best appearance, you should not include HTML.

Because of the above restrictions, HTML tags and HTML entities are stripped from product names, descriptions, keywords and any other types of data being exported to Froogle/GoogleBase.

## 8.11 Gift Certificates

### What Gift Certificates module does

Gift Certificates module enables gift certificates in your store. A gift certificate is a popular type of present for family and friends. It is a thing believed to be the perfect gift in situations where a person wants to get the recipient something thoughtful, but doesn't know what he or she wants.

In terms of X-Cart, a gift certificate is a unique code (distributed on paper or electronically) that is recognized by the store as a means of exchange (not currency, but a substitute for currency; evidence that its holder is entitled to receive products for a definite sum of money). Such a code is issued by the store automatically in response to a request from a customer. The response is submitted in the form of a regular order (In other words, a gift certificate is *purchased* in the same way as any product in the store).

A customer who purchases a gift certificate configures it using the 'Gift certificates' section of the Customer interface (Special menu->Gift certificates): specifies the name of the person who is sending the certificate and the name of the certificate recipient, creates a message for the recipient, chooses an amount of money for which the certificate must be issued, specifies, whether the certificate should be delivered by email or by regular (postal) mail, and provides the recipient's address (according to the selected delivery option).

**Categories**

- Books
- CD - DVD - Video
- Computer hardware
- Electronics
- Games and toys
- Household
- Men's clothes
- Software
- Sport

**Special**

- Gift certificates

**Help**

- Contact us
- Privacy statement
- Terms & Conditions

Your Company Name :: Gift certificate

## Gift certificate

Gift certificates are the perfect solution when you just can't find the right gift or you're short of time. Gift Certificates make a perfect present for friends, family, and business associates.

**Gift certificate verification**

If you have a Gift certificate, you can use it to purchase products.

Gift certificate:

**Gift Certificate details**

**1. Who are you sending this to?**  
The gift certificate will include the sender's name, the recipient's name and a message.

From \*

To \*

**2. Add a message**  
Enter the text that the recipient will see in the e-mail

Message

**3. Choose an amount**  
Specify the amount in currency.

**Your cart**

Cart is empty

- View cart
- Checkout
- Modify profile
- Delete profile
- Orders history

**Authentication**

customer is logged in !

Log out

If Javascript is disabled in your browser click here

As soon as the task of configuring the gift certificate is finished, the customer adds the certificate to the shopping cart and orders it as if it were a regular product.

After the order with the gift certificate gets processed, the certificate is activated and sent to the recipient specified by the certificate purchaser.

The recipient then uses the code specified in the gift certificate to redeem the gift certificate - that is to say, to pay for any order in your store by the gift certificate (*fully* - if the amount on the gift certificate equals or exceeds the total amount of the order, or *partially* - if the amount on the gift certificate is smaller than the total amount of the order).

**Note:** The only limitation is that orders containing nothing but gift certificates cannot be paid for by a gift certificate.

To redeem a gift certificate, a person simply needs to select 'Gift Certificate' as a method of payment on checkout:

Search:  [Advanced search](#) Select language: English

---

**Categories**

- Books
- CD - DVD - Video
- Computer hardware
- Electronics
- Games and toys
- Household
- Men's clothes
- Software
- Sport

**Special**

- Gift certificates

**Help**

- Contact us
- Privacy statement
- Terms & Conditions

Your Company Name :: Checkout :: Payment details

**Checkout: Step 1 of 2**

Product	Price	Quantity	Subtotal
SKU65. New Masters of Flash	\$59.99	1	\$59.99
<b>Summary:</b>			<b>\$59.99</b>
			<b>Subtotal: \$59.99 (€59.99)</b>
			<b>TOTAL: \$59.99 (€59.99)</b>

**Update** >>

**Your cart**

Items: 1  
Total: \$59.99

View cart  
Checkout  
Modify profile  
Delete profile  
Orders history

**Authentication**

customer is logged in !

Log out

If Javascript is disabled in your browser click here

**Payment method**

- Credit Card (Mastercard, American Express)
- Check Payment
- Gift Certificate**
- Phone Ordering Phone: (555) 555-5555
- Fax Ordering Fax: (555) 555-5555
- Money Order US Banks Only
- Purchase Order

**Continue**

and enter the certificate code into a special field in the 'Payment details' form:

Search:  [Advanced search](#) Select language: English

---

**Categories**

- Books
- CD - DVD - Video
- Computer hardware
- Electronics
- Games and toys
- Household
- Men's clothes
- Software
- Sport

**Special**

- Gift certificates

**Help**

- Contact us
- Privacy statement
- Terms & Conditions

Your Company Name :: Checkout :: Payment details

**Checkout: Step 2 of 2**

Product	Price	Quantity	Subtotal
SKU65. Nev Masters of Flash	\$59.99	<input type="text" value="1"/>	\$59.99
<b>Summary:</b>			<b>\$59.99</b>
<b>Subtotal:</b>			<b>\$59.99 (€59.99)</b>
<b>TOTAL:</b>			<b>\$59.99 (€59.99)</b>

[Update](#)

**Payment method: Gift Certificate**

**Payment details**

Personal information:

First Name: John  
Last Name: Smith  
Phone: 923346512

**Your cart**

Items: 1  
Total: \$59.99

[View cart](#)  
[Checkout](#)  
[Modify profile](#)  
[Delete profile](#)  
[Orders history](#)

**Authentication**

customer is logged in !

[Log out](#)

If Javascript is disabled in your browser click here

---

Field for entering a gift certificate code

Gift certificate information

Gift certificate \*

Notes

Customer notes:

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

[Submit order](#)

Powered by X-Cart: shopping cart software Copyright © 2002-2005 Your Company Name

Any holder of a gift certificate has the ability to check the current amount and status of his or her gift certificate by using X-Cart's gift certificate verification service. The remaining balance and the status of a gift certificate can be found out at any time by entering the certificate code into the 'Gift certificate verification' form.

Your Company Name :: Gift certificate

## Gift certificate

Gift certificates gift or you're st friends, family,

'Gift certificate verification' form allowing customers to check the remaining balance and status of a gift certificate

### Gift certificate verification

If you have a Gift certificate, you can check its current amount and status here.

Gift certificate:

### Gift Certificate details

- 1. Who are you sending this to?**  
The gift certificate will include the sender's name, the recipient's name and a message.  
From:   
To:
- 2. Add a message**  
Enter the text that the recipient will see in the e-mail  
Message:
- 3. Choose an amount**  
Specify the amount in currency.

## Roles in Gift Certificates module management

If you are an X-Cart GOLD administrator/provider or an X-Cart PRO administrator:

- You can enable/disable and configure the module Gift Certificates (See [Enabling and Configuring 'Gift Certificates'](#)).
- You can create gift certificates (Check out [Creating Gift Certificates](#)).
- You can manage existing gift certificates (Check out [Managing Gift Certificates](#)):
  - view/edit gift certificate details,
  - change gift certificate statuses,
  - print gift certificates,
  - delete gift certificates.
- You can change the design of printable gift certificates by editing gift certificate templates (See [Gift Certificate Templates](#) for details).

## 8.11.1 Enabling and Configuring 'Gift Certificates'

To begin using the module:

1. Enable Gift Certificates module (Administration menu->Modules).

When the module is enabled, you can see:

- a) Gift certificates link in the Special menu in the Customer zone;
- b) Gift certificates link in the Management menu in the store back-end;
- c) Gift Certificates options section in General settings/Modules options.

2. Adjust the module settings via General settings/Modules options->Gift certificates options.

**General settings**

---

**Gift Certificates options**

---

**General gift certificate options**

Minimum GC value:	<input type="text" value="10"/>
Maximum GC value (0 if unlimited):	<input type="text"/>
Gift Certificate blocking period (to prevent multiple usage of the same Gift Certificate) (minutes):	<input type="text" value="120"/>
Enable posting Gift Certificates by mail:	<input checked="" type="checkbox"/>
Print Gift Certificates on separate pages:	<input type="checkbox"/>
Show expired Gift Certificates:	<input checked="" type="checkbox"/>
Default template for Gift Certificate:	<input type="text" value="template_default.tpl"/>
Allow customers to choose a design for Gift certificate cards that will be sent by postal mail:	<input checked="" type="checkbox"/>

**Email notifications**

Gift certificate notification to orders department:	<input checked="" type="checkbox"/>
Gift certificate notification to purchaser:	<input checked="" type="checkbox"/>

- a) Adjust the options affecting the module in general ('General gift certificate options' subsection):



- Minimum GC value: The minimum amount for which a gift certificate can be issued.
- Maximum GC value (0 if unlimited): The maximum amount for which a gift certificate can be issued.
- Gift Certificate blocking period (to prevent multiple usage of the same Gift Certificate) (minutes): Time period (in minutes) for which a gift certificate used to pay for an order should be blocked.

**Note:** Setting this option helps prevent multiple usage of the same gift certificate.

- Enable posting Gift Certificates by mail: If selected, customers are allowed to choose, whether a purchased gift certificate should be sent by email or by postal mail. If unselected, all gift certificates are always sent by email.
  - Print Gift Certificates on separate pages: If selected, gift certificate cards are printed one card per page (a page break is inserted after each gift certificate).
  - Show expired Gift Certificates: If selected, expired gift certificates are displayed in the 'Gift certificates' section of the store back-end. If you do not wish to see expired gift certificates, leave this check box unselected.
  - Allow customers to choose a design for Gift certificate cards that will be sent by postal mail: If selected, customers are allowed to choose a design for printable gift certificates. If unselected, choosing a design is available only to the store administrator.
- b) Set up the options affecting sending of email notifications ('Email notifications' subsection):
- Gift certificate notification to orders department: If selected, a notification is sent to the orders department when someone purchases a gift certificate (in fact, when the order by which the GC is purchased gets the status *Processed*).

Plain text mail templates for this notification	HTML mail templates for this notification
mail/giftcert_notification.tpl	mail/html/giftcert_notification.tpl
mail/mail_header.tpl	mail/html/mail_header.tpl
mail/giftcert.tpl	mail/html/giftcert.tpl
mail/signature.tpl	mail/html/signature.tpl
mail/giftcert_notification_subj.tpl	

- Gift certificate notification to purchaser: If selected, a notification is sent to the purchaser of a gift certificate when the order by which the GC is purchased gets the status *Processed*.

Plain text mail templates for this notification	HTML mail templates for this notification
mail/giftcert_notification.tpl	mail/html/giftcert_notification.tpl
mail/mail_header.tpl	mail/html/mail_header.tpl
mail/giftcert.tpl	mail/html/giftcert.tpl
mail/signature.tpl	mail/html/signature.tpl
mail/giftcert_notification_subj.tpl	

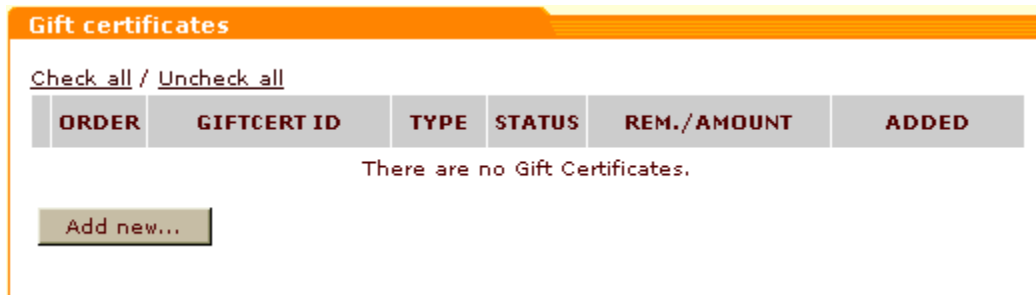
c) Click the **Save** button.

## 8.11.2 Creating Gift Certificates

Normally, gift certificates are created by customers in the Customer zone. However, there may be situations in which the store administrator might need to create a gift certificate. This can be done directly in the Admin zone.

To create a gift certificate:

1. Go to the Gift certificates section of the store administration back-end (Management menu->Gift certificates). You should see a dialog box titled 'Gift certificates'. This dialog box is a place where you can see all the gift certificates in your store (The list may be empty if no gift certificates have been created):



2. Click the **Add new** button at the bottom of the 'Gift Certificates' dialog box. This should open a form titled 'Gift Certificate details':

**Gift Certificate details**

**1. Who are you sending this to?**  
The gift certificate will include the sender's name, the recipient's name and a message.

From \*

To \*

**2. Add a message**  
Enter the text that the recipient will see in the e-mail

Message

**3. Choose an amount**  
Specify the amount in currency.

\$ \*

---

First Name \*

Last Name \*

Address \*

City \*

State

Country

Zip/Postal code \*

Phone

**Create Gift Certificate >>**

3. Complete the 'Gift Certificates details' form:

a) Section 1: Who are you sending this to?

- From: Name of the person or company on whose behalf you are sending the gift certificate.
- To: Name of the gift certificate recipient.

b) Section 2: Add a message

- Message: A message to be sent along with the gift certificate (will be included into the gift certificate).

c) Section 3: Choose an amount

- Specify the amount in currency [*Currency*]: Amount for which you want the gift certificate to be

issued.

d) Section 4: Choose a delivery method

- Send via E-mail/Send via Postal Mail: Method by which you wish the gift certificate to be sent to the recipient (Depending on the selected option, provide an email address or a postal address of the gift certificate recipient. For a gift certificate that will be sent by postal mail, select a [design template](#) from the 'Template' drop-down box).

**Note:** The 'Template' drop-down box appears at the bottom of the 'Send via Postal Mail' section only when sending by postal mail is selected as a delivery method.

4. Preview the gift certificate: click the **Preview** link at the bottom of the the 'Gift Certificates details' form.
5. Click the **Create Gift Certificate** link at the bottom of the 'Gift Certificates details' form. The gift certificate should be added to the list of gift certificates with the status *Pending*. You should see an information box with a confirmation message.
6. Activate the gift certificate by changing its status to *Active*.

### 8.11.3 Managing Gift Certificates

Gift certificates can be managed using the 'Gift Certificates' section of the store administration back-end (Management menu->Gift certificates). This section provides a list of all the gift certificates in your store:

**Gift certificates**

[Check all](#) / [Uncheck all](#)

	ORDER	GIFTCERT ID	TYPE	STATUS	REM./AMOUNT	ADDED	
<input type="checkbox"/>	n/a	<a href="#">912B3239213949D0</a>	Mail	Active	\$0.00/\$100.00	Your Company Name 27-12-2005 19:28:53	<a href="#">Delete</a>
<input type="checkbox"/>	<a href="#">#1007</a>	<a href="#">713C0956ED2AF8DF</a>	Mail	Pending	\$100.00/\$100.00	<a href="#">John Doe</a> 28-12-2005 15:45:50	
<input type="checkbox"/>	<a href="#">#1008</a>	<a href="#">988496545BA729E0</a>	Mail	Pending	\$110.00/\$110.00	<a href="#">Jane Smith</a> 28-12-2005 15:47:43	

[Update all](#)

WARNING: When you update the status of a Gift Certificate to active, this certificate will be automatically sent to the recipient's email.

[Print selected](#)

[Add new...](#)

**Note:** By default, this section does not show *expired* gift certificates. If you wish expired gift certificates to be shown in this section, enable the option 'Show expired Gift Certificates' in General settings/Modules options->Gift certificates options.

For each of the gift certificates in the list, the following information is available:

- **ORDER:** Number of the order in which the gift certificate was ordered ('*n/a*' for gift certificates created by the store administrator, as no order is placed when a gift certificate gets created in the Admin zone).
- **GIFTCERT ID:** A unique identification code assigned to the gift certificate at the time of creation (the code which the Gift certificate owner can enter on checkout to redeem the gift certificate).

**Tip:** Clicking on the ID of a gift certificate displays the details of the gift certificate.

- **TYPE:** Type of the gift certificate ('*Mail*' - for a gift certificate meant for sending by postal mail, '*E-Mail*' - for a gift certificate meant for sending by email).
- **STATUS:** Current status of the gift certificate.

*Pending* - a status automatically assigned to a gift certificate after the order by which the gift certificate is purchased gets placed or after the gift certificate is created by the store administrator.

*Active* (the only status with which a gift certificate can be redeemed) - a status automatically assigned to a gift certificate after the order containing this gift certificate gets *Processed* (In cases when the gift certificate is created by the administrator, the status *Active* must be assigned to a gift certificate manually).

*Blocked* - a status automatically assigned to a gift certificate created as a result of a redemption attempt made during a blocking period.

*Disabled* - a status which can be assigned to a gift certificate in order to make its redemption temporarily unavailable.

*Expired* - a status which can be assigned to outdated gift certificates (to prevent their future usage).

*Used* - a status automatically assigned to any gift certificate after it gets redeemed.

- **REM./AMOUNT:** balance on the gift certificate. The first number shows the amount of money currently remaining on the gift certificate, the second one shows the amount for which the gift certificate was issued.
- **ADDED:** Name of the gift certificate sender + date and time when the gift certificate was created.

## Viewing/editing gift certificate details

If necessary, you can view/edit the details of any gift certificate in your store.

To view/edit the details of a gift certificate:

1. Find the gift certificate whose details you wish to edit in the 'Gift Certificates' section and click on its ID. The gift certificate details will be opened for viewing/modification.

2. Change all the necessary details in the 'Gift Certificate details' form.
3. Click the **Update Gift Certificate** link at the bottom of the 'Gift Certificate details' form. The gift certificate should be updated. You should see an information box with a confirmation message.

## Changing gift certificate statuses

If needed, you can manually change the statuses of your gift certificates.

To change the status of one or more gift certificates:

1. Find the gift certificates whose statuses need to be changed in the 'Gift Certificates' section.
2. Select the desired statuses from the drop-down boxes in the STATUS column.
3. Click the **Update all** button. The statuses should be updated. You should see an information box with a confirmation message.

## Printing gift certificates

To send gift certificates by mail, you first need to print them.

To print one or more gift certificates:

1. Find the gift certificates you wish to print in the 'Gift Certificates' section.
2. Select these certificates for printing by selecting their check boxes.
3. Click the **Print selected** button. The selected gift certificates should be opened in one or more pop-up windows (depending on the number of templates: gift certificates based on the same template are opened in the same pop-up window).
4. Print the gift certificate page(s).

**Note:** It is possible to print only gift certificates meant for sending by regular mail. You cannot print emails.

## Deleting gift certificates

You can delete gift certificates created in the Admin zone directly in the 'Gift certificates' section.

To delete a gift certificate created by the store admin:

1. Find the gift certificate you wish to delete in the 'Gift Certificates' section.

2. Click the **Delete** button opposite this gift certificate. The certificate should be deleted. You should see an information box with a confirmation message.

Gift certificates created by customers can be deleted:

- by deleting the orders by which these gift certificates are purchased;
- by removing the gift certificates from the respective orders (using X-Cart's X-AOM add-on module).

## 8.11.4 Gift Certificate Templates

The design of a printable gift certificate depends on the template used for this certificate. Gift Certificates module is shipped with two pre-designed templates for printable gift certificates:



template\_sample\_1.tpl



template\_sample\_2.tpl

You can use these templates or design your own templates for use with Gift Certificates module.

The two pre-designed templates for printable gift certificates are located in the directory `/skin1/modules/Gift Certificates`. If you decide to create and use your own gift certificate templates, they also need to be uploaded to this directory. The name of a template file must have a prefix 'template\_' (like *template\_certificate1.tpl*) so the module can identify it as a template for printable gift certificates. If the styles of your template need to be defined by CSS, use a separate CSS file (like *template\_certificate1.css*). As soon as you add a gift certificate template file to the `skin1/modules/Gift Certificates` directory, it should become available for selection from the 'Template' drop-down box on the page for creation of a gift certificate ('Gift certificate details' form).

## 8.12 Google Analytics

### What Google Analytics module does

X-Cart's Google Analytics module enables you to use Google Analytics system with your store.

Information on Google Analytics is available at <https://www.google.com/analytics/home>.

### Roles in Google Analytics module management

If you are an X-Cart GOLD administrator/provider or an X-Cart PRO administrator:

- You can enable/disable the module Google Analytics and adjust its configuration settings (See [Enabling and Configuring 'Google Analytics'](#)).

### 8.12.1 Enabling and Configuring 'Google Analytics'

Before you begin using Google Analytics with X-Cart:

1. Sign in to your Google account to access Google Analytics. If you haven't yet got a Google account, sign up for one at <http://www.google.com/analytics/home/>.
2. Sign in to Google Analytics and set up an account:
  - a) Provide general information: Website's URL (URL of the site you wish to track), Account name (a name as it should appear in your Google Analytics reports), Time zone country or territory and Time zone.  
**Note:** If you'd like to track more than one website, you can add more sites once your account has been set up.)
  - b) Provide your contact information: Last name, First name, Phone number, Country or territory.
  - c) Accept the User Agreement.

You will then be provided with a code segment similar to the one below:

```
<script src="http://www.google-analytics.com/urchin.js" type="text/javascript">
</script>
<script type="text/javascript">
_uacct = "XX-XXXXXXX-X";
urchinTracker();
</script>
```

In this segment, you will find your Tracking code - the value of the variable `_uacct` (corresponds to "XX-XXXXXXX-X" in the example above). You will need to enter this Tracking code on the General settings/Modules options->Google Analytics options page of your store.



3. If you wish to use E-Commerce Analysis, let Google Analytics know that your site is an e-Commerce website. To do so, edit the profile settings of your store's website in your Google Analytics account as follows:

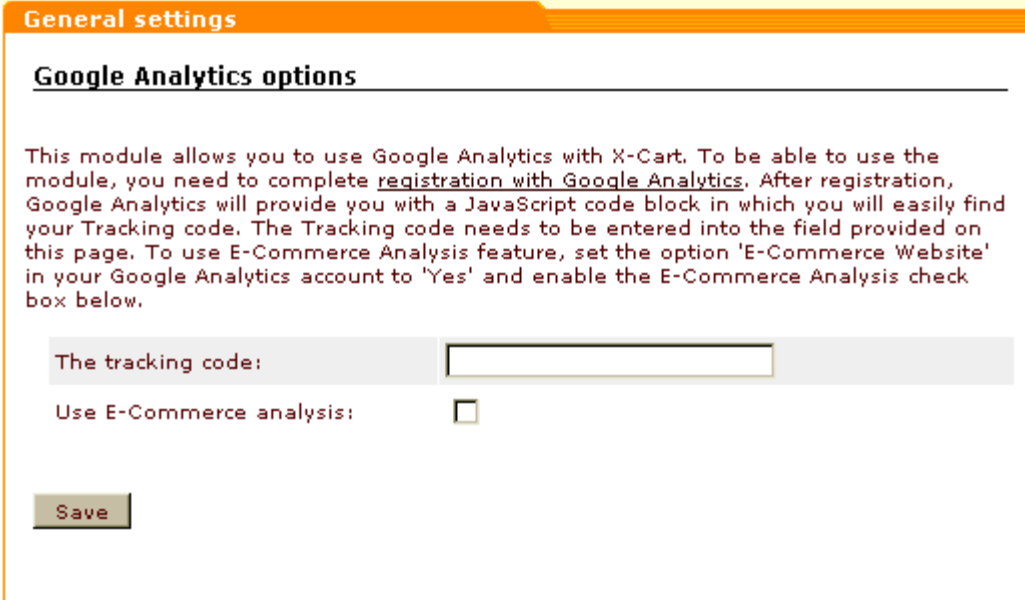
- a) In the 'Website profiles' section, click the 'Edit' link opposite your store website URL. The 'Profile Settings' page for the selected website opens.
- b) On the 'Profile Settings', click the 'Edit' link at the top of the 'Main Website Profile Information' box.
- c) Set the option 'E-Commerce Website' to Yes.
- d) Click the **Save Changes** button.

After you have completed the above steps, you can go to the administration back-end of your store to enable and configure Google Analytics module:

1. Go to the 'Modules' section of your store (Administration menu->Modules) and enable Google Analytics module.

When the module is enabled, a section titled Google Analytics options appears in General settings/Modules options.

2. Adjust the module settings via General settings/Modules options->Google Analytics options.



**General settings**

### Google Analytics options

This module allows you to use Google Analytics with X-Cart. To be able to use the module, you need to complete registration with Google Analytics. After registration, Google Analytics will provide you with a JavaScript code block in which you will easily find your Tracking code. The Tracking code needs to be entered into the field provided on this page. To use E-Commerce Analysis feature, set the option 'E-Commerce Website' in your Google Analytics account to 'Yes' and enable the E-Commerce Analysis check box below.

The tracking code:

Use E-Commerce analysis:

**Save**

- a) The tracking code: Copy your Tracking code from the code segment provided to you as a result of Google Analytics account signup and paste it into this field.
- b) Use E-Commerce Analysis: Select this check box to be able to generate e-commerce reports. For more information on this read <http://www.google.com/adwords/learningcenter/text/31865.html>.
- c) Click the **Save** button to save the changes.

## 8.13 Google Checkout

### What Google Checkout module does

Google Checkout is a module that integrates [Google Checkout flow](#) with your store website. The integration does not remove the standard X-Cart's checkout method, it just provides an alternative allowing your customers to choose, which of the two checkout methods they wish to use. The store administrator processes the orders created through Google Checkout using X-Cart's 'Google Checkout: Order processing' interface.

### Roles in Google Checkout module management

If you are an X-Cart GOLD administrator/provider or an X-Cart PRO administrator:

- You can enable/disable the module Google Checkout (See the section [Enabling Google Checkout Module](#) in the chapter [Preparing to Use 'Google Checkout'](#)).
- You can configure the module Google Checkout (See the section [Configuring Google Checkout Module](#) in the chapter [Preparing to Use 'Google Checkout'](#)).
- You can control which of the products in the store should be available through Google Checkout (See the section [Disabling Google Checkout for Certain Types of Products](#) in the chapter [Preparing to Use 'Google Checkout'](#)).
- You can process orders created through Google Checkout and update their statuses as necessary (See the chapter [Processing Google Checkout Orders](#)).

If you are an X-Cart PRO provider:

- You can control which of your products should be available through Google Checkout (See the section [Disabling Google Checkout for Certain Types of Products](#) in the chapter [Preparing to Use 'Google Checkout'](#)).

### 8.13.1 How 'Google Checkout' Module Works

Google Checkout is a service that offers Internet users the ability to conveniently and securely buy products from multiple online stores using a single buyer profile. Online merchants that provide their customers the ability to use Google Checkout at their stores use special Google Checkout merchant accounts to accept and process Google Checkout orders.

X-Cart's Google Checkout module integrates Google Checkout service with X-Cart system in such a way that the merchant can process Google Checkout orders directly from the store's administration back-end.

To provide Google Checkout service at an X-Cart-based store, the merchant needs to set up an [account](#) with Google Checkout. The merchant will be able to use this account in two ways. On the one hand, he or she will be able to use this account to log in to the Google Checkout Merchant Center and process orders from there. On the other hand, the merchant will be able to specify his or her Google Checkout account information on the Google Checkout module configuration page in the store's administration back-end and thus to enable the store to function in close connection with Google's Merchant Center. In the latter case, the merchant will not have to go the Merchant Center every time he or she needs to check Google Checkout orders, because all the essential information will be available to him or her in X-Cart's Orders Management section.

Google Checkout orders will appear in the Orders list along with orders placed in the traditional X-Cart checkout way. The merchant will instantly be able to identify them as placed through Google Checkout by the look of the drop-down boxes showing their X-Cart statuses: the Status boxes of Google Checkout orders look inactive (grayed out). That is perfectly normal, because, due to the way Google Checkout module functions, the X-Cart statuses of orders created using Google Checkout do not need to be updated manually the way you do it for orders placed using the standard checkout method.

On the whole, processing of Google Checkout orders differs from processing of orders created using X-Cart's standard checkout.

The first thing that needs to be understood is that, although both Google Checkout and X-Cart treat order processing as updating of an order's status, they are entirely different systems and use different terms to describe the process. X-Cart's Google Checkout module combines the two systems in one, so the merchant has to deal with order statuses both [in terms of Google Checkout](#) and [in terms of X-Cart](#).

Plainly speaking, every Google Checkout order in an X-Cart-based store is characterized by two statuses: its Google Checkout status and its X-Cart status. The Google Checkout status of an order is a reflection of the order's financial and fulfillment state in Google Checkout system. The order's X-Cart status is a reflection of the order's progress in X-Cart. As Google Checkout system plays a primary role in processing of orders created through Google Checkout, an order's X-Cart status is fully dependent on the order's status in Google Checkout system.

The Orders Management section of X-Cart's administration back-end provides an interface that allows the merchant to interact with Google Checkout system - a section titled 'Google Checkout: Order processing'. The section is displayed on every Order details page (below the 'Order details' dialog box) and allows the merchant to process the order opened for viewing/modification in terms of Google Checkout. The merchant uses the controls of this section to issue commands to Google Checkout telling

Google Checkout what to do with the order (update the order's financial or fulfillment state, add information to the order, etc). When Google Checkout performs a command issued to it by the merchant, it sends X-Cart a notification as to whether the requested action has been performed successfully. X-Cart receives the notification and updates the order's X-Cart status accordingly.

Registered X-Cart customers can track the progress of orders placed through Google Checkout both in X-Cart and in their personal Google Checkout buyer accounts. Anonymous customers can place orders using Google Checkout, but, as they do not have access to the orders history in X-Cart, can track orders only using the Purchase history page in Google Checkout.

For more information on Google Checkout module, study the following chapters:

- [Google Checkout Order States](#) - A description of the system of order states in Google Checkout.
- [Understanding Google Checkout Flow in X-Cart](#) - A detailed description of how orders get placed through Google Checkout and how Google Checkout and X-Cart order statuses are updated while an order is being processed.
- [Restrictions Imposed by 'Google Checkout' Module](#) - A list of Google Checkout restrictions.
- [Preparing to Use 'Google Checkout'](#) - Information on how Google Checkout module can be enabled and configured.
- [Processing Google Checkout orders](#) - Instructions on how specific Google Checkout commands can be issued using the Google Checkout: Order processing' interface.

## 8.13.2 Google Checkout Order States

At any moment in time any order created using Google Checkout exists in two states:

- financial order state (identifies the financial status of the order),
- fulfillment order state (indicates the status of the order in the order handling process).

The possible financial order states are:

REVIEWING - The order is being reviewed by Google.

CHARGEABLE - The order is ready to be charged.

CHARGING - The order is being charged. The merchant may not refund or cancel an order until the charge is completed.

CHARGED - The order has been successfully charged.

PAYMENT\_DECLINED - The charge attempt failed.

CANCELLED - The seller canceled the order. An order's financial state cannot be changed after the order is canceled.

CANCELLED\_BY\_GOOGLE - Google canceled the order. If Google cancels an order, the merchant is notified of the reason the order was canceled in the <reason> tag of an order state change notification.

The possible fulfillment order states are:

NEW - The order has been received but not prepared for shipping.

PROCESSING - The order is being prepared for shipping.

DELIVERED - The seller has shipped the order.

WILL\_NOT\_DELIVER - The seller will not ship the order. This status is used for canceled orders.

According to Google's system of order states, the states of an order that has just been placed are REVIEWING and NEW. As the order's financial and fulfillment information changes, its Google Checkout states are updated.

In X-Cart, the merchant can see the history of state changes of any order in the Order state log displayed on the Order details page pertaining to that order.

### 8.13.3 Understanding Google Checkout Flow in X-Cart

When Google Checkout module is enabled and configured, customers shop at the store as usual adding items to the shopping cart. As soon as a customer adds to the cart an item that can be paid for using Google Checkout, two checkout buttons appear on the storefront: one for X-Cart's internal checkout, and one for Google Checkout. The buttons can be seen at the top of any store page (below the page header) and on the cart page (below the list of cart items).

To use Google Checkout, the customer should click the **Google Checkout** button. After the customer clicks the button, the store forms an encrypted XML Checkout API request to Google Checkout server. This request contains complete information about the customer's shopping cart (a list of product items contained in the shopping cart, information on their prices and quantity, a complete set of taxes that can be applied to the cart with a listing of tax rates and definitions of destination zones to which they should be applied, a list of shipping methods that a customer may use to ship the order, information as to whether any gift certificates or discount coupons can be redeemed when paying for the order, etc). When the customer is redirected to Google Checkout, Google displays a Sign In/Sign Up page from which the customer can sign in to his or her existing Google account or create a new Google account. If the customer has recently been shopping with Google Checkout and has a valid cookie, the Sign In/Sign Up page does not appear, and the customer goes directly to a page where he or she can create an order - the Place Order page.

After the customer signs in, creating a new account if necessary, Google displays the Place Order page. The customer uses the controls of the Place Order page to choose an address to which he or she wishes

the order to be shipped and a shipping option. If the customer has a gift certificate or a coupon code that he or she wishes to apply to the order, he or she can enter these codes using a field provided for this purpose on the Place Order page. After the customer selects a shipping address or enters a gift certificate or coupon code, Google forms a merchant-calculation-callback which it sends to the store in the form of an XML request. The data provided by this callback (the list of shipping addresses, shipping methods and codes entered by the customer on the side of Google Checkout) allows the store to calculate the order total amount for every possible combination of a shipping method and a customer address considering the taxes, the cost of shipping and the discount amount that need to be applied. The store then sends the results of the merchant calculations as a merchant-calculation-results response to Google Checkout server. Google Checkout displays the results of merchant calculations on the Place Order page, updating the values dynamically if the customer changes the shipping address or the shipping option to be used.

**Note:** Google allows three seconds for the store's calculations service to perform any necessary calculations and return a merchant-calculation-results response. If the merchant calculation fails for any reason, or if Google does not receive a response within three seconds, Google uses the backup tax and shipping values.

The customer submits the order by clicking the button **Place your order now**. Immediately, a new order is created on the side of Google. Google sends the store a new-order-notification. After the notification is received, a new order is created in X-Cart with the status *Queued*.

Having successfully placed an order, the customer sees a Thank you message from Google and can return to the store. In the store, the customer sees a message confirming order placement and is provided with an invoice for the order. Next, he or she receives an order placement confirmation email from Google Checkout.

The merchant is also notified about the new order by email: one notification is sent to the merchant's Google Checkout account by Google, another one is sent to the Orders department email address by X-Cart (The latter is sent only if the respective notification is enabled in General settings->Email notifications options). The merchant can then access the order in the store's administration back-end, review the order details and process it.

Processing of a Google Checkout order typically includes:

- reviewing the order,
- charging the customer,
- adding tracking information to the order,
- shipping and confirming the order.

Upon receiving a new order, Google Checkout assigns to it its first fulfillment status - NEW. (When the merchant begins processing the order, he or she may choose to update this status to PROCESSING by clicking a **Process order** button in the 'Google Checkout: Order processing' interface; however, this step is optional).

Shortly after the order gets placed, Google Checkout begins reviewing it, which corresponds to the financial status REVIEWING. The most important part of the process of reviewing is payment authorization. Google Checkout authorizes the customer's credit card for the amount of the purchase and, as soon as the payment is authorized, it sends X-Cart an order state change notification confirming that the order can now be charged. The order's financial status is updated to CHARGEABLE.

During the stage of reviewing, Google Checkout also performs some risk checks to prevent fraud and sends X-Cart a risk-information-notification providing the customer's IP, partial credit card number, account age information, AVS, CVN, eligible-for-protection statuses and other data that may help make a decision as to whether the order is fraudulent or not.

Normally, the merchant does not have to review the risk information for every order: he or she can [configure](#) X-Cart's Google Checkout module to review the results of the risk checks performed by Google and, according to the results of these checks, either to send Google Checkout a request to charge the order or to put the order off for manual processing by the merchant. A properly configured Google Checkout module will scan all incoming risk information notifications for the customers' AVS, CVN and eligible-for-protection statuses and will check them against the conditions set by the merchant on X-Cart's General settings->Google Checkout options page. If the conditions are satisfied, X-Cart will automatically send a request to Google Checkout to charge the order. If the risk information received from Google does not meet the conditions, the order will remain in the *Queued* status indefinitely until the merchant chooses to process it manually. In the latter case, if the merchant finds the risks associated with processing the order acceptable, he or she will be able to send a request to Google to charge the order by clicking a **Charge order** button in the 'Google Checkout: Order processing' interface.

Provided that the order is in the CHARGEABLE state, upon receiving a charge-order request from the store, Google attempts to charge the amount specified in the order to the customer's account. While the order is being charged, its financial state appears in the order details as CHARGING. Once the charge is completed, Google sends the store a charge-amount-notification, and the financial order state is updated to CHARGED. A change of the Google Checkout financial order state to CHARGED induces an automatic update of the order status in X-Cart: in terms of X-Cart order statuses, the order becomes *Processed*. If, however, Google's effort to authorize or charge a customer's credit card fails, Google puts the order in the PAYMENT\_DECLINED state and emails the customer to request a new credit card. If the customer does not provide a new credit card in 72 hours, the order's financial state is updated to CANCELLED\_BY\_GOOGLE, fulfillment state - to WILL\_NOT\_DELIVER. When that happens, the status of the order in X-Cart becomes *Failed*.

As you would expect, orders that get charged successfully are shipped. The merchant can add carrier tracking information to Google Checkout orders, so the customers will be able to track them in their Google Checkout buyer accounts. A tracking number is added to an order as usual (using the 'Tracking

number' field in the 'Order details' section) and is associated with the order in Google Checkout system by clicking an **Add tracking data** button in the 'Google Checkout: Order processing' interface.

Once an order gets shipped, the merchant informs the customer that the order is on its way by updating the fulfillment order state to DELIVERED. The updating is done with a click of a **Deliver order** button. As a result, the order is marked 'Shipped' in the Merchant Center and on the buyer's account page; a system-generated email is sent to the customer by way of shipping confirmation. After the Google Checkout fulfillment state becomes DELIVERED, the X-Cart status of the order is updated to *Completed*.

X-Cart's 'Google Checkout: Order processing' interface allows the merchant to post messages to the Google Checkout account of any customer who has placed a Google Checkout order at the store. If necessary, the message posted to a customer's Google Checkout account can be duplicated to the customer's email address.

The module also provides the merchant with the ability to perform order cancellations and refunds.

Order cancellations are done using a **Cancel order** button provided by the 'Google Checkout: Order processing' interface. The financial state of an order that gets canceled by the merchant is updated to CANCELLED, the fulfillment status - to WILL\_NOT\_DELIVER. The order automatically becomes *Failed* in X-Cart. For each order being canceled, the merchant can provide a reason for cancellation and a comment (Both the reason and the comment will be visible in the customer's buyer account and in the Merchant Center after the order status is updated).

Orders that have already been charged need to be refunded before they can be canceled. To issue a refund to a customer, the merchant uses a **Refund order** button. A refund amount, a reason and a comment can be sent to Google using a simple form provided by the 'Google Checkout: Order processing' interface.

### 8.13.4 Restrictions Imposed by 'Google Checkout' Module

Google Checkout module imposes some restrictions on X-Cart functionality:

- For compatibility with Google Checkout:
  - taxes may not be included into the product price;
  - cart totals may not be displayed with tax included.

To meet this restriction, disable the tax options 'Included into the product price', 'Display product price including tax' and 'Display cart/order totals including tax'.

- When sending information about a customer address in the merchant-calculation-callback, Google Checkout passes to the store the customer's country code, state, city and postal code. The address and



county fields are not passed. Accordingly, X-Cart cannot identify the customer's destination zone based on address or county masks.

Considering this restriction, you may want to avoid using destination zones based on address or county masks in your store.

- Google Checkout API does not support discount coupons entered on the side of X-Cart. To redeem a discount coupon, your customers will be supposed to enter its code using a field on Google Checkout's Place Order page.
- Google Checkout does not discriminate between discount coupons and gift certificates: the Place Order page provides a single input field that can be used for both types of codes. As a result, the store itself has to determine, whether the code sent to it in the merchant-calculation-callback request is a gift certificate or a discount coupon. The mechanism that checks the code on the side of the store first matches the code entered by the customer against the discount coupon codes stored in the store database to determine whether the code is a discount coupon, and only if no match is found does it start matching the code against gift certificate codes. This has an important consequence: the codes used for discount coupons and gift certificates should be different, otherwise X-Cart will not be able to discriminate between gift certificates and discount coupons correctly (If the code of some gift certificate happens to be the same as the code of some discount coupon, the system will identify this gift certificate as a discount coupon).
- Using real-time shipping rates calculation in X-Cart increases the risk of X-Cart's not being able to provide a merchant-calculation-results response to Google's merchant-calculation-callback within the allowed period of three seconds. If Google does not receive a response within three seconds, it will use the backup tax and shipping values it received in the Checkout API request. If this represents a problem, disable real-time shipping rates calculation at your store.

## 8.13.5 Preparing to Use 'Google Checkout'

### Setting up a Google Checkout merchant account

To be able to use Google Checkout at your store, you will need a Google Checkout merchant account. If you have not yet signed up for one, you can do so [at this page](#). Sign in to your merchant account to obtain your *Merchant ID* and *Merchant Key*. These values will be used by your store to encode order information before it is submitted to Google Checkout. You will need to specify both of these values on the General settings/Modules options->Google Checkout options page (Make sure you use these values only in Live mode. For Test mode, the Merchant ID/Merchant Key pair needs to be obtained separately. See the section [Setting up test accounts in Google Checkout Sandbox service](#) further in this chapter). In your merchant account, your Merchant ID is located on the 'Settings' tab under 'Primary contact information'

header, Merchant Key - in the 'Integration' section ('Settings' tab->'Integration') under 'Account information' header.

## Setting up test accounts in Google Checkout Sandbox service

If you wish to experiment with Google Checkout before offering the service to your customers, create two test accounts in the [Sandbox](#). The Sandbox is a development system that is designed to help you test your Google Checkout implementation. One of your Sandbox accounts needs to function as a customer account and the other needs to function as your merchant account.

A Sandbox customer account can be created at <https://sandbox.google.com/checkout>, a Sandbox merchant account - at <https://sandbox.google.com/checkout/sell>.

Sign in to your test merchant account to locate your *Merchant ID* and *Merchant Key* for Test mode. You will need to specify these values on the General settings/Modules options->Google Checkout options page when running your Google Checkout module in Test mode. In your merchant account, both your Merchant ID and your Merchant Key are listed in the 'Integration' section ('Settings' tab->'Integration') under the 'Account information' header.

## Adjusting the settings that will enable your store to accept callbacks from Google Checkout

When processing orders, Google Checkout and X-Cart exchange data in the form of various notifications and messages. To enable your store to receive notifications and other callbacks from Google, you need to provide Google with an HTTPS API callback URL (an HTTP URL may be used for Test mode). An API callback URL tells Google Checkout where to send notifications about new orders, order state changes, and other events. Your API callback URL needs to be entered into the field 'API callback URL' in your Google Checkout merchant account ('Settings' tab->'Integration'). The URL that you need to specify needs to point to the script `payment/ps_gcheckout.php`.

**Note:** A URL pointing to the location of the `payment/ps_gcheckout.php` script in your store is provided on the General settings/Modules options->Google Checkout options page in the administration back-end.

Your API callback URL needs to be secured by SSL v3 or TLS using a valid certificate from a major Certifying Authority. Please note that the certificate being used needs to be signed: Google Checkout does not trust unsigned certificates, so if the certificate used at your site is not signed, your store will not be able to receive any messages or notifications from Google Checkout, so the module will not be able to function correctly.

Please also note that, for Live mode, you need to provide HTTP authentication for access to the script `payment/ps_gcheckout.php`, for example, an `.htaccess` file if you are using Apache web server. According to [http://code.google.com/apis/checkout/developer/index.html#security\\_precautions](http://code.google.com/apis/checkout/developer/index.html#security_precautions) it only accepts messages that are authenticated by HTTP Basic Authentication, using your Merchant ID and Merchant Key as the username and password.

So you need to create a password to protect access to the `ps_gcheckout.php` file with the username = Merchant ID and the password = Merchant Key

For example, if your Merchant ID is `abc123` and Merchant Key password `123`, then the password protection can be done as follows:

1. Open Summary page of X-Cart admin area and find the X-Cart directory path (something like `/home/user/www/xcart`).

2. If you have shell access to your hosting server enter the following command:

```
htpasswd -c .htpasswd abc123
```

press enter and then enter the merchant key (password) two times.

3. Copy the `.htpasswd` file into the X-Cart's payment folder

4. Open `payment/.htaccess` and add into this file the following information:

```
<Files "ps_gcheckout.php">
AuthType Basic
AuthName "Google Checkout"
AuthUserFile /home/user/www/xcart/payment/.htpasswd # where replace /home/user/
require valid-user
</Files>
```

As an alternative you may use a password to protect access to the `payment/ps_gcheckout.php` file using the password protection setup facility in Control panel of your hosting account.

In addition to your API callback URL, you need to specify the callback method for your store ('Settings' tab->'Integration' in your Google Checkout merchant account). Google Checkout supports two methods: XML and HTML (name/value pairs). X-Cart expects callbacks to be in XML format, so you need to select XML.

Please note that, if PHP on your server runs in CGI mode, the module Google Checkout may function incorrectly: there may be problems with Google Checkout module accepting callback requests from the Google Checkout server. To ensure that Google Checkout can work correctly with PHP running in CGI mode, make sure `mod_rewrite` is installed and `.htaccess` file in the `payment/` directory contains the following lines:

```
<IfModule mod_rewrite.c>
```

```
RewriteEngine on
RewriteRule .* - [E=REMOTE_USER:%{HTTP:Authorization},L]
</IfModule>
```

If this does not help, or if mod\_rewrite is not installed on the server, you can choose to ignore HTTP authentication in the callback script. To do so, uncomment the line:

```
define('GCHECKOUT_IGNORE_AUTH', 1);
```

in the modules/Google\_Checkout/init.php file.

**Warning!** Please only uncomment this line if your callback script is protected by HTTP authentication via the server configuration (.htaccess).

## Enabling Google Checkout module

To enable the module:

1. Go to Administration menu->Modules.
2. In the list of modules, find the name of the module - Google Checkout - and select the check box next to it.
3. Click **Update**.

The module is enabled. You should see a link [Configure](#) to the right of the module description. This link can be used to access the General settings/Modules options->Google Checkout options page where the module can be configured.

## Configuring Google Checkout module

After enabling the module, you need to adjust its configuration. This can be done using the General settings/Modules options->Google Checkout options page:

You need to complete the fields on the Google Checkout options page as follows:

1. Set your account options:
  - Merchant ID: Enter your Merchant ID (a unique numeric code assigned to your business by Google).
  - Merchant key: Enter your Merchant key (a unique alphanumeric code that helps secure your communications with Google). Both your store and Google will use this key to authenticate and verify the integrity of any messages they exchange.
  - Test/Live mode: Select whether you wish to use your Sandbox account (test mode) or actual

Google Checkout account (live mode). The Sandbox works just like the production version of Google Checkout, except that test credit card numbers are allowed, and no funds are ever taken from or paid to anyone.

- Seller account currency: Specify the type of currency supported by your seller account. Your X-Cart store will send prices to Google Checkout in this currency (There is no currency converter, so it is expected that your store uses the same currency). At present, Google Checkout supports only two types of currency - Pounds Sterling (GBP) and United States Dollar (USD).

**IMPORTANT:** The Merchant ID and Merchant key that need to be entered for Test and Live modes are different!

2. Set up the conditions on which orders should be charged:

- Charge order if the result of AVS check-up is: *Full AVS match (address and postal code) / Partial AVS match (postal code only) / Partial AVS match (address only) / No AVS match / AVS not supported by issuer*. Select the AVS status (or statuses) on which the system should charge the order. To select multiple statuses, hold down the CTRL key while clicking on the appropriate status names with your mouse.
- Charge order if the result of CVN check-up is: *CVN match / No CVN match / CVN not available / CVN error*. Select the CVN status (or statuses) on which the system should charge the order. To select multiple statuses, hold down the CTRL key while clicking on the appropriate status names with your mouse.
- Charge order only if it is eligible for Google Checkout's payment guarantee policy: Select this check box if you wish the system to charge only the orders that are eligible for Google Checkout's payment guarantee policy.

3. Adjust the options in the section 'Other options':

- Cancel order if merchant calculations fail: Select this check box if you wish Google Checkout to cancel orders for which it does not receive the correct results of merchant calculations in response to merchant-calculation-callback. Google may fail to receive the said results if, for example, the XML being sent to Google Checkout contains errors or if the response time of your server to Google's merchant-calculation-callback exceeds 3 seconds because of high server load or the server being unstable. If you leave the check box 'Cancel order if merchant calculations fail' unselected, Google Checkout will use the default values it has gotten from X-Cart - the 'Default shipping cost' (may be specified further in the section 'Other options'), the backup tax rate that has been sent to Google Checkout with the shopping cart, etc.
- Disable notifications to customers about placed orders: Specify whether you wish order placement notifications from X-Cart to be sent to customers placing orders through Google Checkout.

**IMPORTANT:** Google Checkout program policy discourages use of order confirmation emails by merchants in order to reduce the

number of redundant emails sent to customers. Because Google itself sends the necessary confirmations, X-Cart's order placement notifications to customers are disabled by default and are not sent unless you re-enable them. We strongly recommend you keep the check box for the option 'Disable notifications to customers about placed orders' selected.

- **Default shipping cost** (will be used if Google Checkout does not receive a correct XML response from your store): Specify a shipping cost that you wish to be sent to Google Checkout if, for some reason, your store cannot provide Google Checkout with a shipping cost value calculated based on the customer's shipping address (For example, if the XML being sent to Google Checkout contains errors or if the response time of your server to Google's merchant-calculation-callback exceeds 3 seconds because of high server load or the server being unstable).
- **Display a note about products not available through Google Checkout in the cart:** Select this check box if you wish a note "Sorry, this product is not available through Google Checkout" to be displayed on the cart page next to the title of each product not available through Google Checkout.

**Note:** According to [Google Checkout: Content policies](#), certain types of products cannot be sold through Google Checkout. If your store sells such products, you will need to [disable Google Checkout](#) for each of them using a special check box on the Product details page. If a customer adds a product for which Google Checkout is disabled to the shopping cart, checkout through Google becomes unavailable for the entire cart (the Google Checkout button becomes inactive). The option 'Display a note about products not available through Google Checkout in the cart' determines whether you let the customer know why this happened or just disable Google Checkout without explanations.

## Meeting Google Checkout restrictions

To ensure seamless integration of Google Checkout with your store, X-Cart's Google Checkout module imposes some restrictions on the store configuration. To make sure the configuration of your store meets these restrictions, go to the General settings/Modules options->Google Checkout options page. Any serious issues that might prevent the module from functioning correctly will be displayed in the section 'Issues found' (Please note that this section appears on the page only when there are problems). If you see any errors listed in this section, make changes to the configuration of your store as appropriate. The error messages should disappear.

For more information on Google Checkout restrictions, see the chapter [Restrictions Imposed by 'Google Checkout' Module](#).

## Disabling Google Checkout for Certain Types of Products

Google Checkout cannot be used for certain types of products (see [Google Checkout: Content policies](#) for

details). If your store sells products that do not comply with Google Checkout content policies, you should disable Google Checkout for these products.

To disable Google Checkout for a product:

1. Open the product's 'Product details' page.
2. Unselect the check box 'Enable Google Checkout for this product'.

**Note:** The check box 'Enable Google Checkout for this product' is displayed only when the module Google Checkout is enabled and functions correctly.

3. Click the **Save** button.

To disable Google Checkout for more than one product, use the [Group product editing](#) feature.

## Using Google Checkout Integration Issues Console

Google Checkout Merchant Center includes an Integration Issues console that identifies the errors and warnings from the API requests that you have sent to Google Checkout. Errors and warnings appear in the console as they occur, enabling you to debug errors as they occur. The console will display error and warning messages from the previous seven-day period. If there are more than 1000 errors and warnings from the previous seven days, only the most recent 1000 messages will be accessible.

We recommend you check the console periodically to ensure that your Google Checkout integration is working as you expect.

To locate the Integration Issues console, log in to your Merchant Center account and click the 'Settings' tab. Then click the 'Integration' link in the menu on the left side of the page. The console displays in the center of the page.

You can use the console to debug errors in your test environment or your production environment. To view errors in your test environment, log in to your Sandbox account. To view errors in your production environment, log in to your Google Checkout account.

More information about the Integration Issues Console is available at [http://code.google.com/apis/checkout/developer/index.html#integration\\_issues\\_console](http://code.google.com/apis/checkout/developer/index.html#integration_issues_console).

## 8.13.6 Processing Google Checkout Orders

Processing of Google Checkout orders is performed using the 'Google Checkout: Order processing' interface. This interface can be accessed through the 'Order details' page: all you need to do is open a Google Checkout order for viewing/modification and scroll down to the lower part of the page. The '

Google Checkout: Order processing' section is located just below the 'Order details' section. It provides information about the order currently displayed and allows you to perform various operations affecting the order's financial and fulfillment states in Google Checkout.

The upper part of the 'Google Checkout: Order processing' section provides the most essential information about the order like so:

```
Google Checkout Order: #622748452041546
Total amount: $83.90
Current state:
  Fulfillment state: NEW (2006/11/15 08:11:00)
  Financial state: CHARGEABLE (2006/11/15 08:11:01)
```

Below the information about the order's Google order number, total amount and current state, an Order state log box is displayed. The Order state log provides a complete history of order state changes of the order like this:

```
[2006/11/15 08:11:00] Fulfillment state: NEW
[2006/11/15 08:11:00] Financial state: REVIEWING
[2006/11/15 08:11:01] Financial state changed from REVIEWING to CHARGEABLE
[2006/11/15 08:11:02] RISK INFO received
```

The information in the Order state log will be updated as you process the order by issuing Google Checkout financial and fulfillment commands.

Below is a complete list of Google Checkout commands that can be issued using the controls of the 'Google Checkout: Order processing' section.

## Financial commands

### Charge order command

The 'Charge order' subsection of the 'Google Checkout: Order processing' section allows the merchant to manually charge the order. Manual charging may be performed within 72 hours after the order has been assigned the status CHARGEABLE.

To perform a charge, click the **Charge order** button.

The store will send a request to Google Checkout to charge the order. You should see a confirmation in an Information box.

When Google Checkout begins charging the order, the order's financial state will appear in the Order state log as CHARGING. Once the charge is completed, the financial order state will become CHARGED. The status of the order in X-Cart will be updated to *Processed*.



If Google's attempt to charge the customer's credit card is unsuccessful, Google will put the order in the `PAYMENT_DECLINED` state and will send the customer an email message to request a new credit card. If the customer does not provide a new credit card in 72 hours, the order's financial state will be updated to `CANCELLED_BY_GOOGLE`, fulfillment state - to `WILL_NOT_DELIVER`. If that happens, the status of the order in X-Cart will become *Failed*.

### Cancel order command

The 'Cancel order' subsection allows the merchant to cancel the order. This section is available only when the financial order state is `REVIEWING` or `CHARGEABLE`. It does not appear while the order is in the `CHARGING` or `CHARGED` state.

**Note:** If you wish to cancel an order that has already been charged, you first need to refund the order. The section 'Cancel order' will become available after the order becomes `REFUNDED`.

To cancel the order:

1. Use the 'Reason' drop-down box to select a reason for the cancellation.
2. If necessary, provide a comment in the 'Comment' field.
3. Click the **Cancel order** button.

The store will send a request to Google Checkout to cancel the order. You should see a confirmation in an Information box.

After Google Checkout cancels the order, the order will be marked `CANCELLED` in the Google Checkout Merchant Center. A notification will be sent to the customer containing the reason and the comment that you provided.

In X-Cart, the Order state log will show the order's Google Checkout financial state updated to `CANCELLED`. The X-Cart status of the order will be updated to *Failed*.

**Note:** You will not be able to change the order's financial state after the order is canceled.

### Refund order command

The 'Refund order' subsection allows the merchant to refund the order. Note that this section becomes available only after the order has been charged and is in the `CHARGED` financial order state.

To issue a refund:

4. Specify the amount that needs to be refunded in the 'Refund amount' field (Partial refunds supported).
5. Provide a reason in the 'Reason' field.
6. If necessary, provide a comment in the 'Comment' field.

7. Click the **Refund order** button.

The store will send a request to Google Checkout to refund the order. You should see a confirmation in an Information box.

After Google Checkout performs the refund, the order will be marked REFUNDED in the Google Checkout Merchant Center. A notification will be sent to the customer containing the refund reason and the comment that you provided.

In X-Cart, the Order state log will show the order's Google Checkout financial state updated to REFUNDED. The refund amount will be displayed in brackets after the word REFUNDED. Please note that if you perform several partial refunds, you will get a separate REFUNDED record for each of the refunds in your Order state log.

**Note:** The 'Refund order' command will not affect the X-Cart status of the order in your store. If you wish the order state change caused by the refund to take effect on the side of the store, you need to edit the order manually using X-AOM (Advanced Order Management) add-on module.

## Fulfillment commands

### Process order command

After an order gets placed, it is assigned its first fulfillment status - NEW. When the merchant begins processing the order, he or she may wish to mark the order as being processed (This step is completely optional).

To mark the order as being processed, click the **Process order** button in the 'Process order' subsection. The order's fulfillment state will be updated to PROCESSING.

**Note:** The 'Process order' command does not affect the order's X-Cart status.

### Add tracking data command

The merchant can add carrier tracking information to the order so the customer will be able to track the order via his or her Google Checkout buyer account.

When you ship the order, you assign a carrier tracking number to it using the 'Tracking number' field in the 'Order details' section. To associate this tracking number with the order, click the **Add tracking data** button. You should see a confirmation message.

**Note:** The 'Add tracking data' button looks inactive if the order does not have a tracking number. It will be activated after you enter the tracking number into the appropriate field of the 'Order details' section and click the 'Update' button.

### Deliver order command

Once the order has been shipped, the merchant can inform the customer that the order is on its way. To do so, the merchant can send a system-generated shipping confirmation message to the customer's Google Checkout buyer account and, optionally, to the customer's email address.

To send a shipping confirmation to the customer's buyer account, click the **Deliver order** button. You should see a confirmation message.

If you also wish to send the shipping confirmation by email, be sure to select the 'Send e-mail to the customer' check box before clicking on **Deliver order**.

After the shipping confirmation is sent, the order's fulfillment state will be updated to DELIVERED. The X-Cart status of the order will change to *Completed*.

The order will be marked 'Shipped' in the Merchant Center and on the buyer's account page.

## Sending messages

The 'Send message' subsection allows the merchant to send messages to the customer who placed the order. It contains a 'Message' text area, a 'Send e-mail to the customer' check box and a **Send message** button.

To post a message to the customer's Google Checkout buyer account:

1. Enter the text of the message into the 'Message' text area.
2. Click the **Send message** button.

The message will be posted. You should see a confirmation message in an Information box.

If, in addition to posting the message to the customer's buyer account, you also wish to send the same message to the customer's email address, select the 'Send e-mail to the customer' check box before clicking the **Send message** button.

**Note:** The 'Send message' command does not impact the order's fulfillment state.

## Archiving commands

The module provides the merchant with an archiving feature that allows the merchant to manage the list of orders in his or her Merchant Center inbox by moving orders to and from the Merchant Center archive.

When you are finished with an order, you can remove it from the list of orders that appear on the Orders page of the Merchant Center: simply click the **Archive order** button in the 'Archiving commands'

subsection. The order will be archived. You should see an Information box with a confirmation message.

**Note:** Archiving Google Checkout orders is optional; you may choose not to archive orders.

To restore an order from the archive, click the **Unarchive order** button. Again, a confirmation message will be displayed in an Information box.

## 8.14 Greet Visitor

### What Greet Visitor module does

This module greets your customers by the name when they return to your store website.

The screenshot displays the X-Cart website interface. At the top, there is a navigation bar with 'HOME', 'SHOPPING CART', and 'CONTACT US' buttons. Below this, a search bar and a language selector are visible. The main content area is divided into several sections:

- Categories:** Lists various product categories like Books, CD - DVD - Video, Computer hardware, etc.
- Help:** Includes links for Contact us, Privacy statement, and Terms & Conditions.
- Welcome back, John Smith:** A personalized greeting message for a registered user. A callout box points to this message with the text: "When a registered user returns to the store site, he or she is greeted by the name".
- Featured products:** Displays a product titled "Javascript (Definitive Guide)" with its price, quantity, and a "Buy Now" button.
- Your cart:** Shows that the cart is empty and provides options to view the cart, checkout, or modify the profile.
- Authentication:** Indicates that a customer is logged in and provides a "Log out" button.

**Note:** Greet Visitor module does not work if http:// and https:// domains are different. For example, <http://www.example.com> and <https://www.example.myhosting.com>. For the correct module operation both the protocol (http or https) and the domain (www.example.com and example.myhosting.com) parts must match.

### Roles in Greet Visitor module management

If you are an X-Cart GOLD administrator/provider or an X-Cart PRO administrator:

- You can enable/disable the module Greet Visitor via the Modules section of X-Cart administration back-end (Administration menu->Modules).

## 8.15 Image Verification

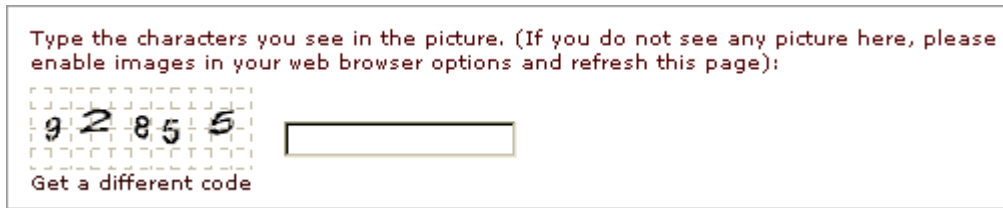
### What Image Verification module does

X-Cart's Image Verification module is a solution designed to prevent automated form submissions in your store. The problem of automated submissions is caused by spam robots (spambots) - software programs that impersonate human beings and imitate their online activities for various malicious purposes. In an X-Cart-based store not using Image Verification module, spambots are likely to attempt to take advantage of the following forms:

- 'Profile details' form (customer registration page);
- 'Authentication' form (any pages from which existing customers can log in);
- 'Send to friend' form (product details page);
- 'Customer reviews' form (product details page);
- 'Contact us' form (one of the help pages available through X-Cart's 'Help' menu);
- 'Subscribe to newlists' form (news subscription page for anonymous customers);
- Survey forms (any pages on which surveys can be completed/submitted).

The damage induced by automated submissions of the above forms by spambots may vary from insignificant to serious, but, in the most general case, is likely to include automated registrations of customer accounts (up to thousands of accounts every minute), dictionary/brute force attacks aiming to defeat the store's password system by continuously submitting to it various words/combinations of characters making the server iterate through the entire space of passwords, sending spam messages to the email addresses of the store owner/company ('Contact us' form) and email addresses of other Internet users ('Send to friend' form), distortion of survey statistics and posting annoying messages as product reviews.

Image Verification module generates tests that allow X-Cart system to determine whether it is dealing with a human or with a program pretending to be human (a spambot). Tests are designed in such a way that they can be easily passed by most humans, but cannot be passed by current computer programs. A test is pretty simple: the user is required to type a sequence of characters (letters, digits or both) that is displayed to him or her as an obscured, distorted image on the screen:



While the disguised code cannot be read by a computer program, it is easily read by a human. As a result, only human beings are allowed to submit forms.

It should be said that, although most code strings can be read by humans without problems, as a result of image distortion, certain combinations of characters may be poorly legible. You should not worry about that, as there is a link 'Get a different code' displayed below each distorted image, which allows the user to choose a different image at any time he or she wishes to do so.

The module is rather flexible in that you can adjust the type of characters (letters, digits or both) and the length of string that may appear in images protecting the store forms. It is also possible to choose, which of the forms that can be protected by image verification should actually be protected (all the forms or just some of the forms).

## Roles in Image Verification module management

If you are an X-Cart GOLD administrator/provider or an X-Cart PRO administrator:

- You can enable/disable the module Image Verification and adjust its configuration settings (See [Enabling and Configuring 'Image Verification'](#)).

### 8.15.1 Enabling and Configuring 'Image Verification'

To begin using the module:

1. Enable Image Verification module (Administration menu->Modules).

When the module is enabled, a section titled Image Verification options is added to General settings/Modules options.

2. Adjust the module settings via General settings/Modules options->Image Verification options.

**General settings**

---

**Image Verification options**

---

**Image generator options**

Image generator:

Type of string that should be used for the image:

Length of string:

The code must be case sensitive:

**Where to display**

On Registration page:

On pages with an authentication form (after 3 unsuccessful attempts to log in):

On Contact us page:

On Send to friend page:

On customer reviews page:

On survey page:

On news subscription page:

a) Adjust the options affecting the module in general ('Image generator options' subsection):

- Image generator: Select the type of image generator that you wish to use. At present, the only available option is the *default* generator.
- Type of string that should be used for the image: Select the type of characters that should be displayed in the image (*Numbers only*, *Letters only*, *Numbers and letters*).

**Note:** Please be aware that image verification tests using letters are case-sensitive. If a distorted image displayed on the screen includes any letters, the user needs to enter them in the appropriate case. If you think that might represent a difficulty for your customers, disable use of letters for your image verification tests.

- Length of string: Specify the number of characters that should be displayed in the image.
- The code must be case sensitive: Select the check box if you wish the code to be case-sensitive.

b) Specify, what forms should be protected by image verification. To do so, select the check box

opposite the name of each location in which you wish the protecting image to be displayed ('Where to display' subsection):

- On Registration page: Select this to prevent automated registrations of new customer accounts.
- On pages with an authentication form (after 3 unsuccessful attempts to log in): Select this to prevent multiple log-in attempts by spambots trying to fit passwords to customer accounts. When this option is enabled, the protecting image appears in the form only after a user makes three unsuccessful attempts to sign in.
- On Contact us page: Select this to prevent spam being sent through the 'Contact us' help section of your store.
- On Send to friend page: Select this to prevent spam being sent through the 'Send to friend' section of the product details page.
- On customer reviews page: Select this to prevent automated postings of reviews.
- On survey page: Select this to prevent automated submissions of survey forms aiming to distort survey results.
- On news subscription page: Select this to prevent automated subscriptions of emails to your store's news.

c) Click the **Save** button to save the changes.

## 8.16 Import 3x-4x

### What Import 3x-4x module does

This module allows a store based on X-Cart 4.1.x to import data exported from a 3.x.x or 4.0.x store (ensures compatibility of data formats).

### Roles in Import 3x-4x module management

If you are an X-Cart GOLD administrator/provider or an X-Cart PRO administrator:

- You can enable/disable the module Import 3x-4x and adjust its configuration settings (See [Enabling and Configuring 'Import 3x-4x'](#)).



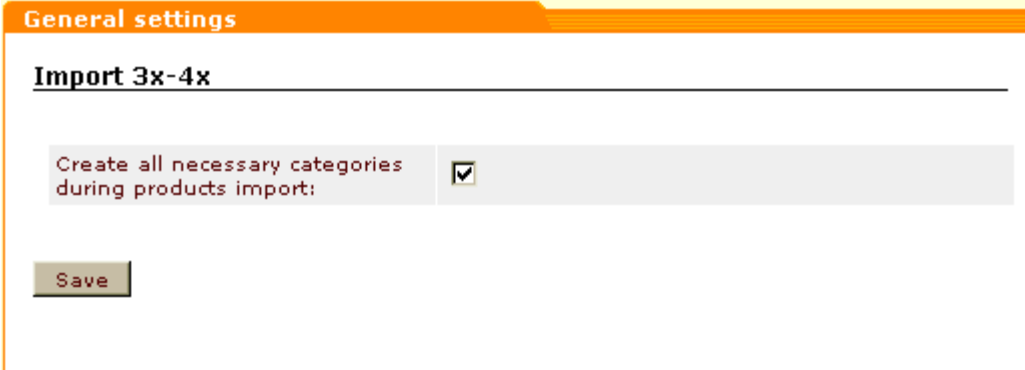
## 8.16.1 Enabling and Configuring 'Import 3x-4x'

To begin using the module:

1. Enable Import 3x-4x module (Administration menu->Modules).

When the module is enabled, a section titled Import 3x-4x is added to General settings/Modules options.

2. Adjust the module settings via General settings/Modules options->Import 3x-4x:



The screenshot shows a web interface for configuring the 'Import 3x-4x' module. The title bar is orange and says 'General settings'. Below it, the section is titled 'Import 3x-4x'. There is a checkbox labeled 'Create all necessary categories during products import:' which is checked. Below the checkbox is a 'Save' button.

- a) Adjust the check box 'Create all necessary categories during products import'. If this check box is selected, during import X-Cart creates all the categories specified in the product details of the products being imported that have not existed in the store by the time of data import. If unselected, X-Cart refuses to import products that, according to their details, belong to a product category that does not already exist in the store (An error is generated for each unknown category).
- b) Click the **Save** button to save the changes.

## 8.17 Interneka

### What Interneka module does

This module enables you to use Interneka Affiliate Tracking Software with your X-Cart-based store.

### Roles in Interneka module management

If you are an X-Cart GOLD administrator/provider or an X-Cart PRO administrator:

- You can enable/disable the module Interneka and adjust its configuration settings (See [Enabling and Configuring 'Interneka'](#)).

## 8.17.1 Enabling and Configuring 'Interneka'

To begin using the module:

1. Enable Interneka module (Administration menu->Modules).

When the module is enabled, you can see: Interneka options section in General settings/Modules options.

2. Adjust the module settings via General settings/Modules options->Interneka options:

The screenshot shows a web interface for configuring the Interneka module. It is titled 'General settings' and 'Interneka options'. There is a text input field for 'Enter your Interneka ID:'. Below it are two checkboxes, both of which are checked: 'Check this to enable 'per Sale, %' payment model:' and 'Check this to enable 'per Lead, \$' payment model:'. At the bottom left of the form is a 'Save' button.

- a) Use the 'Enter your Interneka ID' field to specify your Interneka ID.
- b) If you wish to enable 'per Sale, %' payment model, select the appropriate check box.
- c) If you wish to enable 'per Lead, \$' payment model, select the appropriate check box.
- d) Click on **Save**.

## 8.18 Maintenance Agent

### What Maintenance Agent module does

This module enables X-Cart to send email notifications to the store administrator with information about the store functioning during a certain period. These notifications can include visits statistics, orders statistics, various log messages (error logs, logs of file operations, DB backup/restore, data import, changes of environment settings, operations on products and orders, etc).

## Roles in Maintenance Agent module management

If you are an X-Cart GOLD administrator/provider or an X-Cart PRO administrator:

- You can enable/disable the module Maintenance Agent and adjust its configuration settings (See [Enabling and Configuring 'Maintenance Agent'](#))

### 8.18.1 Enabling and Configuring 'Maintenance Agent'

To begin using the module:

1. Enable Maintenance Agent module (Administration menu->Modules).

When the module is enabled, you can see: Maintenance Agent options section in General settings/Modules options.

2. Adjust the module settings via General settings/Modules options->Maintenance Agent options:

General settings

#### Maintenance Agent options

Periodic sending of e-mails to the store administrator about the store activity:	Once a day <input type="text"/>
Periodic e-mail sending mode:	Manual <input type="text"/>
Include messages from shop logs into periodic e-mails:	<div style="border: 1px solid gray; padding: 5px;">           Database operations            File operations            Order-related operations            Product-related operations            Errors in receiving realtime shipping rates            Online payment processing errors            PHP errors            SQL errors            Environment changes            Debug messages         </div>
Include site visits statistics into periodic e-mails:	<input checked="" type="checkbox"/>
Include orders statistics into periodic e-mails:	<input checked="" type="checkbox"/>
<input type="button" value="Save"/>	

- a) Use the field 'Periodic sending of e-mails to the store administrator about the store activity' to specify, how often you wish to receive email notifications from Maintenance Agent ( *Once a day, Once a week, Once a month*).

Periods are calculated as follows:

- a *day* is a period of 24 consecutive hours from midnight to midnight;
  - a *week* is a period of 7 consecutive days;
  - a *month* is a period from a day in one month to a day numerically corresponding to that day in the following month, less one day.
- b) Use the field 'Periodic e-mail sending mode' to specify, whether you want Maintenance Agent notifications to be sent automatically or in manual mode.

When *Automatic* mode is selected, the script that sends Maintenance Agent notifications is activated by any store script being run first in a period following the period covered in the report.

*For example*, you enable Maintenance Agent module on April 27, setting the period of sending email notifications to '*Once a day*'.

In this case, the first Maintenance Agent notification is sent to the site administrator email address immediately after you click the Save button in General settings/Modules options->Maintenance Agent options. The report in this notification covers the period from 12:00am April 26 to 12:00am April 27.

The next notification is sent on April 28, provided that at least one shop script is run on that day. The report in this notification covers the period from 12:00am April 27 to 12:00am April 28.

If no one uses the store on April 28 (no script is run), and the next script is called only on April 29, no notification is sent on April 28, while on April 29 the site administrator receives a report covering the period from 12:00am April 27 to 12:00am April 29.

Selecting *Manual* mode provides you more flexibility in adjusting the period of sending email notifications. Using this mode, you can set a cron script to periodically run `admin/send_periodic.php` - a script that sends Maintenance Agent notifications:

```
/usr/local/bin/php /path/to/your/store/admin/send_periodic.php
```

**Note:** The script `admin/send_periodic.php` is used only in *Manual* mode and can be run only from the command line (you cannot run it using the browser's address line).

- c) If you wish messages from shop logs to be included into Maintenance Agent notifications, select titles of logs messages from which you wish to receive.
- d) If you wish statistics on visits to the store site to be included into Maintenance Agent notifications, select the appropriate check box.
- e) If you wish orders statistics to be included into Maintenance Agent notifications, select the appropriate check box.
- f) Click on **Save**.

## 8.19 Manufacturers

### What Manufacturers module does

If your store sells goods for more than one manufacturers, some of your customers may be interested in

being able to find products by the name of an individual or company that produced them.

The module Manufacturers helps you meet the needs of such customers, as it allows you to categorize your products by the producer (manufacturing firm, provider, developer, etc).

*Examples:*

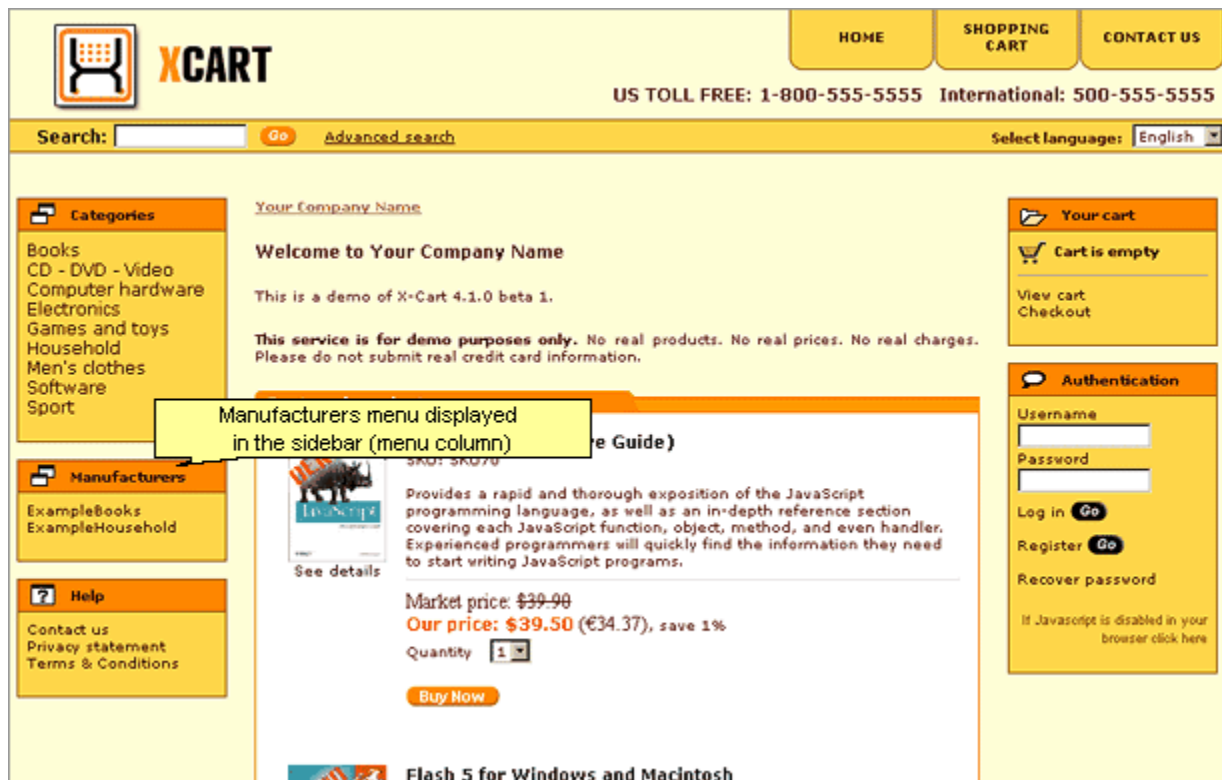
A shop specializing in mobile phones could have categories based on brand names: 'Nokia', 'Siemens', 'SonyEricsson', etc.

Using manufacturer categories is optional: if you do not want to use them, you do not have to.

Manufacturer categories can help your customers in one of the two ways:

- Customers can find products by browsing manufacturer categories in a way similar to browsing custom product categories.
- Customers can specify a manufacturer in the Advanced search options when searching for products using X-Cart's Product search functionality.

Depending on the module settings, the list of available manufacturer categories can either be displayed in the Manufacturers menu in the Customer area sidebar (menu column):



or be hidden under the Manufacturers link of the Special menu:

The screenshot shows the X-Cart homepage. At the top, there is a navigation bar with 'HOME', 'SHOPPING CART', and 'CONTACT US' buttons. Below this is a search bar and a language selector set to 'English'. The main content area is divided into several sections:

- Categories:** Lists various product categories like Books, CD - DVD - Video, Computer hardware, etc.
- Special:** Contains a link for 'Manufacturers'. A yellow callout box points to this link with the text: "Manufacturers menu hidden under a link in Special menu".
- Help:** Includes links for 'Contact us', 'Privacy statement', and 'Terms & Conditions'.
- Your Company Name:** A central section with a welcome message and a 'Buy Now' button for a product.
- Your cart:** Shows 'Cart is empty' and options to 'View cart' or 'Checkout'.
- Authentication:** A login section with fields for 'Username' and 'Password', and buttons for 'Log in', 'Register', and 'Recover password'.

Clicking on a manufacturer category name allows a customer to view all the products in your store which are produced by this manufacturer.

The screenshot shows the 'Manufacturers' page in X-Cart. The breadcrumb trail at the top reads: 'Your Company Name :: Manufacturers :: ExampleBooks'. The page displays the following information:

- URL:** <http://www.example.com>
- Description:** My description of the manufacturer
- Manufacturer List:** A list of manufacturers including 'ExampleBooks' and 'ExampleHousehold'.
- Product List:** A list of products under the 'ExampleBooks' manufacturer, sorted by 'Default'. The first product is 'New Masters of Flash' (SKU: SKU65) with a market price of \$79.99 and a current price of \$59.99 (25% off). The second product is 'Professional Java Server Programming' (SKU: SKU66).
- Your cart:** Shows 'Cart is empty' and options to 'View cart', 'Checkout', or 'Orders history'.
- Authentication:** A login section with fields for 'Username' and 'Password', and buttons for 'Log in', 'Register', and 'Recover password'.

Both administrators and providers have the ability to create manufacturer categories and assign specific

products to them.

## Roles in Manufacturers module management

If you are an X-Cart GOLD administrator/provider or an X-Cart PRO administrator:

- You can enable/disable and configure the module Manufacturers (See [Enabling and Configuring 'Manufacturers'](#)).
- You can create manufacturer categories (Check out the section [Adding Manufacturers](#)).
- You can control all existing manufacturer categories (Study the section [Managing Existing Manufacturers](#)):
  - [adjust the order in which manufacturer categories appear on the storefront](#),
  - [enable/disable manufacturer categories](#),
  - [modify the details of any manufacturer categories](#);
  - [delete any manufacturer categories](#).
- You can assign products to manufacturer categories (See [Assigning Products to Manufacturers](#)).
- You can enable/disable product search by manufacturers for customers (See [Enabling Product Search by Manufacturers](#)).

If you are an X-Cart PRO provider:

- You can create manufacturer categories (Check out the section [Adding Manufacturers](#)).
- You can control manufacturer categories that you own (For details, see [Managing Existing Manufacturers](#)):
  - [modify the details of any manufacturer categories you created](#) (except that you cannot rename your own manufacturer categories if they are used by some other providers),
  - [delete any manufacturer categories you created](#) if none of the other providers in the store are using them.
- You can assign products to manufacturers (See [Assigning Products to Manufacturers](#)).
- You cannot control the order in which manufacturer categories appear on the storefront or enable/disable manufacturer categories.
- You cannot modify or delete manufacturer categories created by other providers.

### 8.19.1 Enabling and Configuring 'Manufacturers'

To begin using the module:

1. Enable Manufacturers module (Administration menu->Modules).

When the module is enabled, you can see:

- a) Manufacturers item in the Management menu;

- b) Manufacturers link in the 'Product Management' section menu (when a product is opened for editing);
  - c) Manufacturers options section in General settings/Modules options.
2. Adjust the module settings via General settings/Modules options->Manufacturers options:

**General settings**

**Manufacturers options**

Manufacturers list limit (leave empty if unlimited):

Show manufacturers list in the menu column:

Manufacturers per page (admin):

**Save**

- a) Use the 'Manufacturers list limit (leave empty if unlimited)' field to specify the maximum number of manufacturer categories which can appear in the Manufacturers menu (If the number of manufacturer categories in your store is greater than this limit, all the manufacturer categories beyond this limit will be concealed under the Other manufacturers... link.
- b) If you wish your manufacturer categories to be displayed in the Manufacturers menu of the Customer area sidebar, select the 'Show manufacturers list in the menu column' check box.
- c) Use the 'Manufacturers per page (admin)' field to specify the maximum number of manufacturers which can be displayed on one page in the 'Manufacturers list' dialog box in the Admin zone.
- d) Click on **Save**.

## 8.19.2 Adding Manufacturers

### Creating manufacturer categories

To add a manufacturer category:

1. Open the 'Manufacturers' section of the store back-end:
  - (If you are an X-Cart GOLD administrator/provider or an X-Cart PRO administrator): Click on Manufacturers in the Management menu.
  - (If you are an X-Cart PRO provider): Click on Manufacturers in the Products menu.



You should see a dialog box titled 'Manufacturers list'. The first time you enter the 'Manufacturers' section, this form will be empty:

MANUFACTURER	PROVIDER	PRODUCTS	ORDERBY	ACTIVE
No manufacturers				

[Add new...](#)

On your subsequent visits, after you add some manufacturer categories, the 'Manufacturers list' dialog box will contain a list of existing categories.

[Check all](#) / [Uncheck all](#)

	MANUFACTURER	PROVIDER	PRODUCTS	ORDERBY	ACTIVE
<input type="checkbox"/>	<a href="#">ExampleBooks</a>	Provider, Provider (provider)	10	<input type="text" value="10"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<a href="#">ExampleHousehold</a>	Provider, Provider (provider)	16*	<input type="text" value="20"/>	<input checked="" type="checkbox"/>

**Note:** The manufacturer category includes products of more than one providers

[Delete selected](#)    [Update](#)

[Add new...](#)

2. Click the **Add new** button at the bottom of the 'Manufacturers list' dialog box. A form titled 'Manufacturer details' should be opened.

**Manufacturer details**

[Manufacturers list](#) **Go**

**Manufacturer:** \*

**Logo:**

**Description:**

**URL:**

**OrderBy:**

**Availability:**

3. Use the 'Manufacturer details' form to provide all the necessary details for the manufacturer category being created:
  - a) Use the 'Manufacturer' field to enter a name for the new manufacturer category.
  - b) Select an image that will be displayed as the manufacturer's logo.
  - c) Use the 'Description' field to enter a description of the manufacturer.
  - d) Use the 'URL' field to enter an URL of the manufacturer's site.
  - e) Use the 'OrderBy' field to enter a number that will define the position position of the manufacturer category relative to the other manufacturer categories in the manufacturers list.
  - f) Select the 'Availability' check box to activate the manufacturer.

**Note for X-Cart PRO users:** The 'OrderBy' field and the 'Availability' check box are available only to administrator users, as only administrators can activate manufacturer categories and set up their order in the manufacturers list. When a provider creates a new manufacturer category, the store administrator needs to specify its position number and activate it. New manufacturers do not appear on the storefront until they are activated.

**Manufacturer details** [Manufacturers list](#) **Go**

**Manufacturer:** \*

**Logo:**

**Description:**

**URL:**

**OrderBy:**

**Availability:**

4. Click on **Save**. The new manufacturer category should be added. After an automatic page refresh, you should see an information box with a confirmation message.

Now, if you wish, you may add [international descriptions](#) for the newly created manufacturer category.

To add more manufacture categories, scroll down to the 'Manufacturer details' form and click the Add Manufacturer link at its top. This should open a new 'Manufacturer details' form which you will be able to use for creating another manufacturer category.

You can return to the 'Manufacturers list' dialog box at any time by clicking the **Manufacturers list** link at the top of the 'Manufacturer details' form.

**Note for X-Cart PRO users:** Only administrators can activate manufacturer categories and set up their order in the manufacturers list. Thus, when a provider creates a new manufacturer category, the store administrator needs to specify its position number and activate it. New manufacturers do not appear on the storefront until they are activated.

## Managing international descriptions for manufacturer categories

If your store supports more than one languages, you need to provide names and descriptions for your manufacturer categories in all the languages supported by your store. In X-Cart, a combination of a name and a description for a manufacturer category in a language other than the default store language is

traditionally referred to as manufacturer's *international description*.

To add an international description for a manufacturer category:

1. Open the 'Manufacturer details' form with the details of the manufacturer category for which you wish to create an international description.

*If you are working on a manufacturer category that has just been created:* After you see an information box with a message confirming successful creation of the manufacturer category, scroll down to the bottom of the page. In the 'Manufacturer details' form with the details of the newly created manufacturer category, you should see a language selector.

*If you are working on a category that was created some time ago:* Open the manufacturer category for modification by clicking on its name in the 'Manufacturers list' dialog box. In the 'Manufacturer details' form with the details of the manufacturer category, you should see a language selector.

**Manufacturer details**

[Manufacturers list](#) **Go**   [Add Manufacturer](#) **Go**

Language: English

**Manufacturer: \*** ExampleBooks

**Logo:** No image Available  
Change image

**Description:** My description of the manufacturer

**URL:** http://www.example.com

**OrderBy:** 10

**Availability:**

Save

2. Use the language selector to select a language in which you want to add an international description. The language of the interface should change and, after an automatic page refresh, you should see the 'Manufacturer details' form in the selected language.

**Herstellerdetails**

[Herstellerliste](#) **Go**    [Einen Hersteller hinzufügen](#) **Go**

Sprache:

**Hersteller:** \*

**Logo:**  **Bild ändern**

**Kurzbeschreibung:**

**URL:**

**Sortieren nach:**

**Verfügbarkeit:**

**Speichern**

3. Edit the necessary manufacturer category details (enter a name and a description for the manufacturer category in the selected language).
4. Save the changes. The international description should be added. You should see an information box with a confirmation message.
5. If necessary, select a different language from the language selector and create a description in that language using the method described above.

To edit an international description of a manufacturer category:

1. Open the details of the manufacturer category for editing in the 'Manufacturer details' form.
2. Use the language selector to select the language of the international description that needs to be edited.
3. Edit the name and/or description of the manufacturer category.
4. Save the changes. The international description should be updated.

## 8.19.3 Managing Existing Manufacturers

### Changing the order in which manufacturer categories appear on the storefront

To change the order in which your manufacturer categories appear on the storefront, do the following:

1. Open the 'Manufacturers list' dialog box.
2. Change the position number of one or more manufacturer categories.
3. Click on **Update**.

The order of the manufacturer categories in the Customer zone should change.

### Enabling/Disabling manufacturer categories

To temporarily disable one or more manufacturer categories, do the following:

1. Open the 'Manufacturers list' dialog box.
2. Unselect the check boxes in the ACTIVE column for the manufacturer categories which you want to be temporarily disabled.
3. Click on **Update**. The disabled categories should disappear from the storefront.

To enable one or more manufacturer categories, select the check boxes in the ACTIVE column for these categories and click on **Update**. The categories should appear on the storefront.

### Modifying the details of manufacturer categories

To rename a manufacturer category, to change its icon, description or any other parameter(s), do the following:

1. Open the 'Manufacturers list' dialog box.
2. Click on the name of the manufacturer category whose details you wish to modify.
3. Change the necessary details.
4. Click on **Save**. The details of the manufacturer category should be updated. You should see an information box with a confirmation message.

### Deleting manufacturer categories

To completely remove a manufacturer category, do the following:

1. Open the 'Manufacturers list' dialog box.
2. Select the check boxes next to the names of the manufacturer categories you wish to delete.
3. Click on **Delete selected**. The selected manufacturer categories should be removed. You should see an information box with a confirmation message.

## 8.19.4 Assigning Products to Manufacturers

Each product in your store can be assigned to one of the defined manufacturer categories.

To assign a product to a manufacturer category:

1. Find the product for which you want to define a manufacturer. Open this product for modification in the 'Product Management' section. The product's details should be displayed in the 'Product details' form.
2. Select the product's manufacturer from the 'Manufacturer' drop-down box in the 'Classification' section of the 'Product details' form.

**Product details**

**Product thumbnail**

**Thumbnail**  
(recommended size 50x50-150x150)

No image Available

Change image

**Classification**

**Main category:** Computer hardware/Memory chips

**Additional categories:**

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

**Manufacturer:** Manufacturer is not specified

**Availability:** Available for sale

Manufacturer drop-down box

Save

3. Click the **Save** button.

The product should be assigned to the selected manufacturer category and added to this manufacturer category on the storefront.

## 8.19.5 Product Search by Manufacturers

When the module Manufacturers is enabled, product search by manufacturers is available: 'Manufacturers' field is added to the product search form for customers. This field can be used by customers to specify products of which manufacturer(s) need to be found.

'Manufacturers' field is enabled in 'General settings/Product search options' by default, so you needn't worry about enabling it when you begin using Manufacturers module.



**General settings**

**Product search options**

FIELD NAME	ACTIVE	DEFAULT VALUE
Manufacturers	<input checked="" type="checkbox"/>	Manufacturer is not specified ExampleBooks ExampleHousehold
Category	<input checked="" type="checkbox"/>	<input type="text"/>
Price	<input checked="" type="checkbox"/>	<input type="text"/> - <input type="text"/>
Weight	<input checked="" type="checkbox"/>	<input type="text"/> - <input type="text"/>

However, if you wish to disable search by manufacturers, you can disable this field at any time. Simply go to the 'General settings/Product search options' section, unselect the ACTIVE check box for 'Manufacturers' field and click on **Save**.

## 8.20 News Management

### What News Management module does

News Management module allows you to inform your customers about different kinds of news at your store (special offers, discounts, new products, etc):

- you can create messages about your store news using the 'News management' section of the administration back-end;
- the messages appear in the 'News' section of the Customer zone and/or get sent to those of your clients who are subscribed to your newsletter.

The module functions in such a way that any news message created with it is posted not independently, but as part of a *news list*. News lists are news categories that organize your news messages by topic. Setting up several news lists in one store provides more flexibility for your customers who subscribe to the store newsletter: they can subscribe not to all of your news, but just to the news lists in which they are interested.

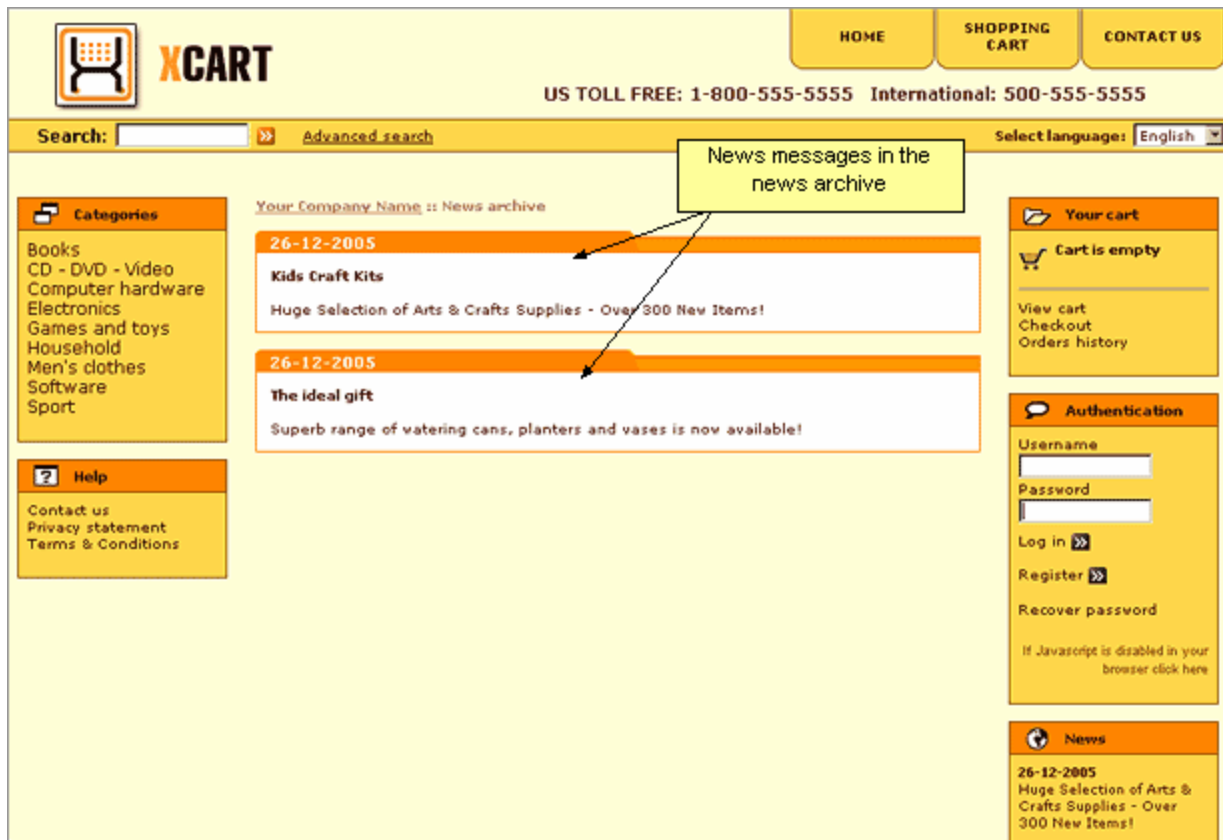
## 'News' section

The 'News' section is a place in the Customer zone which can display your latest news.

The screenshot shows a typical e-commerce front-end. On the left, there are navigation menus for 'Categories' (Books, CD - DVD - Video, Computer hardware, Electronics, Games and toys, Household, Men's clothes, Software, Sport) and 'Help' (Contact us, Privacy statement, Terms & Conditions). The main content area features a 'Featured products' section with two items: 'Javascript (Definitive Guide)' and 'Flash 5 for Windows and Macintosh'. Each product listing includes a 'See details' link, market price, current price with a discount percentage, a quantity selector, and a 'Buy Now' button. On the right, there are sections for 'Your cart' (showing 'Cart is empty'), 'Authentication' (with fields for Username and Password, and buttons for Log in, Register, and Recover password), and 'News'. The 'News' section is highlighted with a callout box and shows a news item from 26-12-2005: 'Huge Selection of Arts & Crafts Supplies - Over 300 New Items!'. Below the news item is a 'Previous news' link and an email subscription form with a 'Subscribe' button.

This section appears on the front-end only when there is at least one news list which is *active* and needs to be *shown as news*.

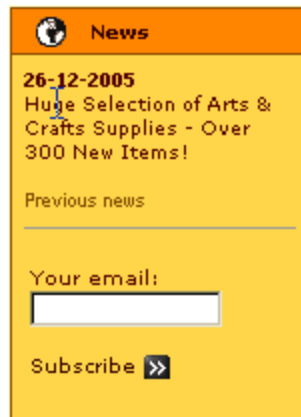
Before you post any news messages, the 'News' section says 'No news available at the moment'. After you have added one or more news messages, the message added latest of all appears in the 'News' section. The news messages posted previously are available for viewing in the news archive (accessible by clicking the 'Previous news' link).



## Newsletter

Newsletter is an information letter available to store users by subscription. In order to receive newsletter emails, a client needs to provide an email address and specify, which of the available news lists he or she would like to read. When you have news lists which are *active* and *available for subscription*, newsletter subscription is available to any visitors of your store site, no matter if they are registered or anonymous.

Anonymous visitors can subscribe by entering their email address into 'Your email' field in the 'News' section:



**News**

**26-12-2005**  
Huge Selection of Arts & Crafts Supplies - Over 300 New Items!

[Previous news](#)

Your email:

Subscribe >>

and select the news lists to which they would like to subscribe from the list in the 'Subscribe to newslists' form (This form is displayed as soon as an email address is entered in the 'News' section):



**Subscribe to newslists**

**New Arrivals**  
*Join our mailing list and receive a weekly listing of "New Arrivals"*

**Coupons and Special Offers**  
*Subscribe to our Newsletter and receive exclusive coupons and special offers.*

Subscribe

**Note:** The 'Subscribe to newslists' form can be protected by image verification. See the chapter [Image Verification](#) for details.

Registered customers and new clients getting registered can subscribe to the newsletter using the 'Newsletter' section of the 'Profile details' form:

**Profile details**

**Personal information**

Title \*    
First Name \*

**Newsletter**

If you wish to receive our Newsletter, please select the News lists to which you want to subscribe:

New Arrivals  
*Join our mailing list and receive a weekly listing of "New Arrivals"*

Coupons and Special Offers  
*Subscribe to our Newsletter and receive exclusive coupons and special offers.*

Clicking "SUBMIT" you agree with our Terms & Conditions.

**Note:** The same form can be used by registered customers to change the set of news lists included into their newsletter subscription (to add more news lists or to unsubscribe from any news lists).

As soon as a client subscribes to a news list, his or her email address is automatically added to the *mailing list* for that news list so the client can begin getting the newsletter.

If you wish, you can enable notification emails to subscribers. Notification emails not only notify your new subscribers of the fact that their email address has been entered into a mailing list, but also provide a confirmation link allowing these subscribers to confirm their desire to receive newsletter emails. When such notification emails are enabled, no news messages are sent to new subscribers until they confirm their subscription. This prevents spam and ensures that your newsletter emails are sent only to those clients who really wish to receive them.

An 'Unsubscribe' link is provided with each newsletter, so if any of your customers wish to discontinue their newsletter subscription, they will be able to do so at any time.

## Roles in News Management module management

If you are an X-Cart GOLD administrator/provider or an X-Cart PRO administrator:

- You can enable/disable and configure the module News Management (See [Enabling\\_and Configuring 'News Management'](#)).
- You can create and manage news lists (Check out [News lists](#))
- You have full control over mailing lists (Check out [Mailing lists](#)).

You can:

- add email addresses to any mailing list (manually or by importing a file with a list of email addresses),
- delete email addresses from a mailing list,
- export email addresses from a mailing list.
- You can create messages for news lists, manage created news messages and send them to newsletter subscribers (See [News List Messages](#))

If you are an X-Cart PRO provider:

- You cannot post any news on the store site or send newsletters by yourself.

### 8.20.1 Enabling and Configuring 'News Management'

To begin using the module:

1. Enable News Management module (Administration menu->Modules).

When the module is enabled, you can see:

- a) News management link in the Management menu;
  - b) News management options section in General settings/Modules options.
2. Adjust the module settings via General settings/Modules options->News management options.

**General settings**

### News management options

---

#### General news management options

Newsletter limit to show:	<input style="width: 60px;" type="text" value="30"/>
Send the message to N subscribers per one pass when sending newsletters:	<input style="width: 60px;" type="text" value="All"/>
Interval in seconds between the passes:	<input style="width: 60px;" type="text" value="0"/>

#### Email notifications

Reply-To newsletter email address:	<input style="width: 150px;" type="text"/>
'Client is subscribed' notification to subscriber:	<input checked="" type="checkbox"/>
'Client is subscribed' subscribe notification to Reply-To newsletter email address:	<input checked="" type="checkbox"/>
'Client is unsubscribed' notification to subscriber:	<input checked="" type="checkbox"/>
'Client is unsubscribed' notification to Reply-To newsletter email address:	<input checked="" type="checkbox"/>

- a) Adjust the options affecting the module in general ('General news management options' subsection):
- **Newsletter limit to show:** Maximum number of newsletters which can be displayed on one page in the 'News list' dialog box in the store back-end.
  - **Send a message to N subscribers per one pass when sending newsletters:** Number of subscribers to which a newsletter message can be sent per one pass (Set this option if you wish to send newsletter emails in batches, N emails at a time).
  - **Interval in seconds between the passes:** An interval between the passes in which newsletter messages are sent.
- b) Set up the options affecting sending of email notifications ('Email notifications' subsection):
- **Reply-To newsletter email address:** An email address that appears in the 'From:' field of newsletter emails sent to customers (might be used by your customers to reply to your newsletter

emails).

- 'Client is subscribed' notification to subscriber: If selected, an email notification is sent to a store site visitor who joins a newsletter mailing list that he or she has subscribed to a newsletter .

Plain text mail templates for this notification	HTML mail templates for this notification
mail/newsletter_subscribe.tpl	mail/html/newsletter_subscribe.tpl
mail/mail_header.tpl	mail/html/mail_header.tpl
mail/signature.tpl	mail/html/signature.tpl
mail/newsletter_subscribe_subj.tpl	

- 'Client is subscribed' subscribe notification to Reply-To newsletter email address: If selected, an email notification is sent to the Reply-To newsletter email address that a new client has subscribed to a newsletter.

Plain text mail templates for this notification	HTML mail templates for this notification
mail/newsletter_admin.tpl	mail/html/newsletter_admin.tpl
mail/mail_header.tpl	mail/html/mail_header.tpl
mail/signature.tpl	mail/html/signature.tpl
mail/newsletter_admin_subj.tpl	

- 'Client is unsubscribed' notification to subscriber: If selected, an email notification is sent to a subscriber who has unsubscribed from a newsletter that his or her subscription is terminated.

Plain text mail templates for this notification	HTML mail templates for this notification
mail/newsletter_unsubscribe.tpl	mail/html/newsletter_unsubscribe.tpl
mail/mail_header.tpl	mail/html/mail_header.tpl
mail/signature.tpl	mail/html/signature.tpl
mail/newsletter_unsubscribe_subj.tpl	

- 'Client is unsubscribed' notification to Reply-To newsletter email address: If selected, an email notification is sent to the Reply-To newsletter email address if somebody unsubscribes from a newsletter.



Plain text mail templates for this notification	HTML mail templates for this notification
mail/newsltr_unsubscr_admin.tpl	mail/html/newsltr_unsubscr_admin.tpl
mail/mail_header.tpl	mail/html/mail_header.tpl
mail/signature.tpl	mail/html/signature.tpl
mail/newsltr_unsubscr_admin_subj.tpl	

**Note:** 'Client is subscribed' and 'Client is unsubscribed' email notifications are available only for cases when clients subscribe to or unsubscribe from a newsletter by themselves. No notification is sent when a client's email address is added to or removed from a mailing list by the store admin.

c) Click on **Save**.

## 8.20.2 News Lists

### Creating news lists

Before you can create any news messages, you need to create one or more news lists. News lists are categories in which specific news messages are created.

*Examples:*

'New Arrivals' could be a good name for a news list intended for messages like 'Newest & hottest products for your Mac' or 'Over 50 new items in *Books* category'.

'Coupons and Special Offers' could be a good name for a news list intended for messages like '20% off of any order Dec 20 - Jan 1' or 'Buy 2 books - get a 3rd one FREE!'.

You can create as many news lists as you need in any of the languages supported by your store.

To create a news list:

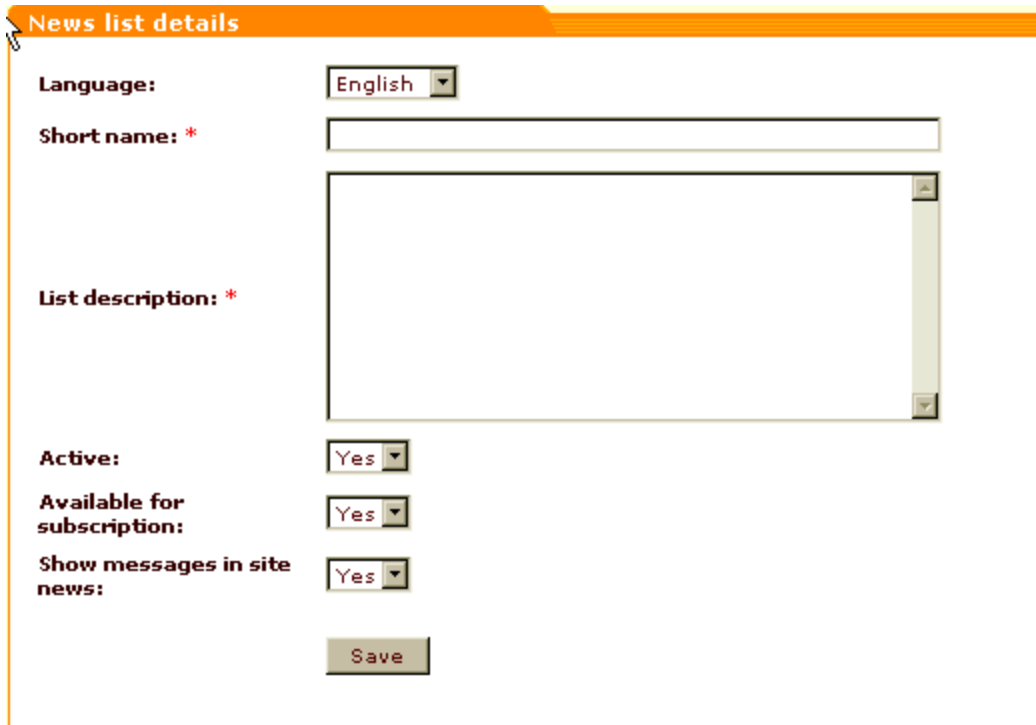
1. Go to the 'News Management' section of the store back-end (Management menu->News management). You should see a dialog box titled 'News Lists'. The first time you enter the 'News Management' section, this form will be empty:



On your subsequent visits, after you add some news lists, the 'News Lists' dialog box will contain a list

of existing news lists.

2. In the 'News Lists' dialog box, click the **Add new** button. This should open a form titled 'News list details'.



The screenshot shows a web form titled "News list details" with an orange header. The form contains the following elements:

- Language:** A dropdown menu currently set to "English".
- Short name: \*** A single-line text input field.
- List description: \*** A large multi-line text area.
- Active:** A dropdown menu currently set to "Yes".
- Available for subscription:** A dropdown menu currently set to "Yes".
- Show messages in site news:** A dropdown menu currently set to "Yes".
- Save** button at the bottom center.

3. Use the 'News list details' form to provide information about the news list being created:
  - a) Each news list can exist only in one language, so you need to specify the language of the news list being created. Use the 'Language' drop-down box to select a language.
  - b) Use the 'Short name' field to provide a title for the news list.
  - c) Enter a description for the news list into the 'List description' field.
  - d) Use the 'Active' drop-down box to enable/disable the news list.

News lists which are enabled ('Active' = Yes) are available to customers. Depending on the 'Available for subscription' and 'Show messages in site news' options, such news lists may be available for subscription or may show messages in the 'News' section of the Customer zone.

News lists which are disabled ('Active' = No) are not available for subscription and do not appear in the site news ('News' section or news archive) regardless of the 'Available for subscription' and 'Show messages in site news' options.
  - e) Use the 'Available for subscription' drop-down box to specify, whether the news list should be available for subscription
  - f) Use the 'Show messages in site news' drop-down box to specify, whether the news list messages should be shown in the site news.

**News list details**

Language:

Short name: \*

List description: \*

Active:

Available for subscription:

Show messages in site news:

4. Click on **Save**. The news list should be created. After an automatic page refresh, you should see an information box with a confirmation message.

To view the newly created news list added to the list of news lists within the 'News Lists' dialog box, click the News lists link in the 'See also' menu at the top of the page. Your 'News Lists' dialog box with the added news list will look like this:

**News lists**

[Check all](#) / [Uncheck all](#) Language:

	LIST NAME	SHOW AS NEWS	ACTIVE
<input type="checkbox"/>	<u>New Arrivals</u>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

After you have created a news list, you may want to set up its mailing list or create messages that will be sent to the news list subscribers or shown as news on your site.

## Managing existing news lists

You can view/modify the details of any news list (rename, edit the description or change the status), as well as delete any news list if you are not going to use it any more.

All the operations on existing news lists can be performed using the controls of the 'News lists' dialog box in the 'News Management' section of the store back-end (Management menu->News management ).

	LIST NAME	SHOW AS NEWS	ACTIVE
<input type="checkbox"/>	<u>New Arrivals</u>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<u>Coupons and Special Offers</u>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Buttons: Delete selected, Update, Add new

To view/modify the details of a news list (rename, edit the description or change the news list's 'Available for subscription' status):

1. Open the 'News lists' dialog box.
2. Use the language selector at the top of the 'News lists' dialog box to select the language of the news list which you wish to view/modify. This should produce a list of all the available news lists for the selected language.
3. Find the news list whose details you wish to view/modify and click on its name. The details of the news list should be opened in the 'News list details' form.

**Note:** The language selector in this 'News list details' form should be inactive, as it is not possible to change the language of news lists.

4. If necessary, edit any of the news list details.
5. Click on **Save** to save the changes.

The updated details should be saved. An information box with a confirmation message should appear.

If you need just to enable/disable a news list, or change a news list's show as news status, you can do it

directly in the 'News lists' dialog box:

1. Open the 'News lists' dialog box.
2. Use the language selector at the top of the 'News lists' dialog box to select the language of the news list(s) whose status(es) you wish to change. This should produce a list of all the available news lists for the selected language.
3. Find the news list(s) whose statuses you wish to change.
4. Select the check boxes in the ACTIVE column for all the news lists that need to be enabled (unselect to disable).
5. Select the check boxes in the SHOW AS NEWS column for all the news lists whose news messages you wish to be displayed on the store front-end.
6. Click on **Save** to save the changes.

The statuses should be updated. An information box with a confirmation message should appear.

To delete one or more news lists:

1. Open the 'News lists' dialog box.
2. Use the language selector at the top of the 'News lists' dialog box to select the language of the news list(s) you wish to delete. This should produce a list of all the available news lists for the selected language.
3. Select the check boxes next to the names of the news list(s) you wish to delete.
4. Click on **Delete selected**.

The selected news lists should be removed. An information box with a confirmation message should appear.

## 8.20.3 Mailing Lists

### Adding email addresses to a mailing list

Each of the news lists that you make *available for subscription* is supposed to have its own *mailing list* - a list of subscriber email addresses to which messages of this news list are sent. Normally, email addresses get added to the mailing lists of your news lists automatically as store site visitors subscribe to these news lists. However, there may be situations in which you might need to be able to add one or more email addresses to a mailing list by yourself. There are two methods in which you can add email addresses to a

mailing list: by adding them manually one by one or by importing email addresses from a file. The former seems applicable for situations in which there are just a few addresses that need to be added; the latter allows you to add large numbers of email addresses at once, which may be especially helpful when moving your subscribers' data to a new shop or simply when setting up a news list mailing list on the basis of an already existing one.

To edit a news list's mailing list, you first need to open this mailing list:

1. (If necessary) Find the news list whose mailing list you wish to edit.
2. Open the details of the news list for viewing/modification (Click on the news list name in the 'News Lists' dialog box).
3. Click the Subscriptions link in the 'News Management' section menu.

This should open a dialog box titled 'News list mailing list'.

Before any email addresses are added to the mailing list of the current news list (by you or your customers), the mailing list will be empty:

**News list mailing list**

E-MAIL	SINCE DATE
No subscribers are found	

**Add to the subscription**

E-Mail:

**Import list of subscribers**

File for uploading:

After some of your customers subscribe to the news list (or after you add some email addresses to the mailing list from the Administration back-end), the mailing list will contain a list of subscriber email addresses:

**News list mailing list**

[Check all](#) / [Uncheck all](#)

	E-MAIL	SINCE DATE
<input type="checkbox"/>	jane_doe@example.com	27-12-2005
<input type="checkbox"/>	john_doe@example.com	26-12-2005

**Add to the subscription**

E-Mail:

**Import list of subscribers**

File for uploading:

(The dates in the SINCE DATE column opposite the email addresses are the dates when the corresponding subscriptions were set up).

To add an e-mail address to a mailing list manually:

1. Open the mailing list to which you wish to add an email address.
2. Enter the e-mail address into the 'E-Mail' field of the 'Add to the subscription' subsection of the 'News list mailing list' dialog box.
3. Click the **Add** button. The email address should be added to the list. An information box with a confirmation message should appear.

To add e-mail addresses to a mailing list by importing:

1. Obtain a text file with a list of email addresses that need to be imported.

**Tip:** If you wish to add to the mailing list email addresses from another mailing list, first open that mailing list and [export the email addresses](#) you need to a text file.

The format of the file should be the following:

```
email1@example.com
email2@example.com
email3@example.com
```

2. Open the mailing list to which you wish to import the email addresses from your file.
3. Use the **Browse** button next to the 'File for uploading' field in the 'Import list of subscribers' subsection of the 'News list mailing list' dialog box to locate and select the file that needs to be imported.
4. When the name of the import file appears in the 'File for uploading' field, click the Import button. The email addresses contained in your import file should be added to the mailing list.

### Managing email addresses contained in a mailing list

You can delete email addresses from mailing lists to unsubscribe owners of these email addresses from the newsletter.

To delete one or more email addresses from a mailing list:

1. Open the mailing list from which you wish to delete email addresses.
2. Select the check boxes next to the email addresses which you wish to delete.
3. Click the **Delete selected** button.

You can export some or all of the email addresses contained in a mailing list to a separate file (This file can then be [re-imported](#) into X-Cart in order to add email addresses to some other mailing list).

To export e-mail addresses from a mailing list:

1. Open the mailing list from which you wish to export email addresses.
2. In the 'News list mailing list' dialog box, select the addresses you wish to export.
3. Click the **Export selected** button.
4. Save the export file.

## 8.20.4 News List Messages

### Adding messages to a news list

After you have created a news list, you can create messages for it.

To add a news message:

1. (*If necessary*) Find the news list to which you wish to add a news message.



- Open the details of the news list for viewing/modification (Click on the news list name in the 'News Lists' dialog box).
- Click the Messages link in the 'News Management' section menu. This should open a dialog box titled 'News list messages'.

Before any messages are added to the current news list, the list of messages in the 'News list messages' dialog box will be empty:

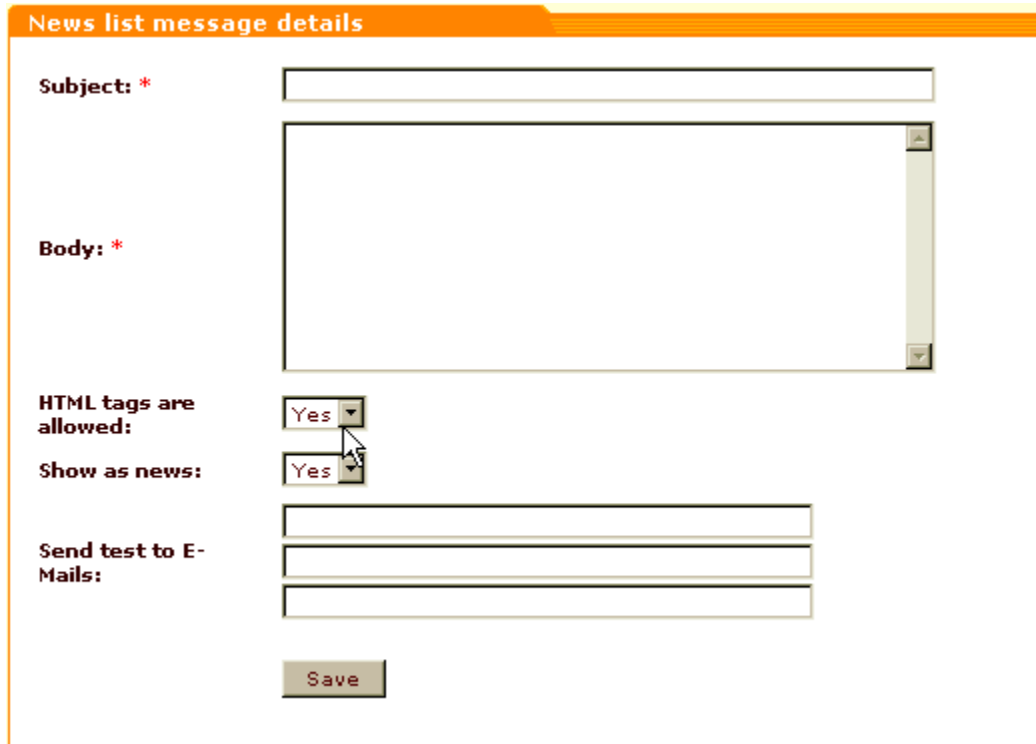


SUBJECT	CREATED	STATUS	SEND MESSAGE
No messages are found			

Add new

On your subsequent visits, after you add some messages to the news list, the 'News list messages' dialog box will contain a list of news list messages.

- Click the **Add new** button at the bottom of the 'News list messages' dialog box. A form titled 'News list message details' should appear:



News list message details

**Subject: \***

**Body: \***

**HTML tags are allowed:**

**Show as news:**

**Send test to E-Mails:**

Save

- Use the 'News list message details' form to provide information about the news message being

created:

- a) Use the 'Subject' field to specify the subject of the message (If the news list is available for subscription, the subject specified in this field will be used as the subject of the email message sent to the news list subscribers).
- b) Use the 'Body' field to enter the text of the news message.

**Note:** If you wish to use HTML tags to format your news message, enable the 'HTML tags are allowed' option.

- c) Use the 'HTML tags are allowed' drop-down box to specify whether you want to use HTML tags in the news message.
- d) Use the 'Show as news' drop-down box to specify whether the message should be shown in site news.
- e) (*Optional*) If you are intending to send the message as a newsletter, you may want to make sure it looks OK when sent by email before you actually send it to customers. To do so, specify 1-3 email addresses in the 'Send test to E-Mails' fields.

**News list message details**

**Subject: \***

**Body: \***

**HTML tags are allowed:**

**Show as news:**

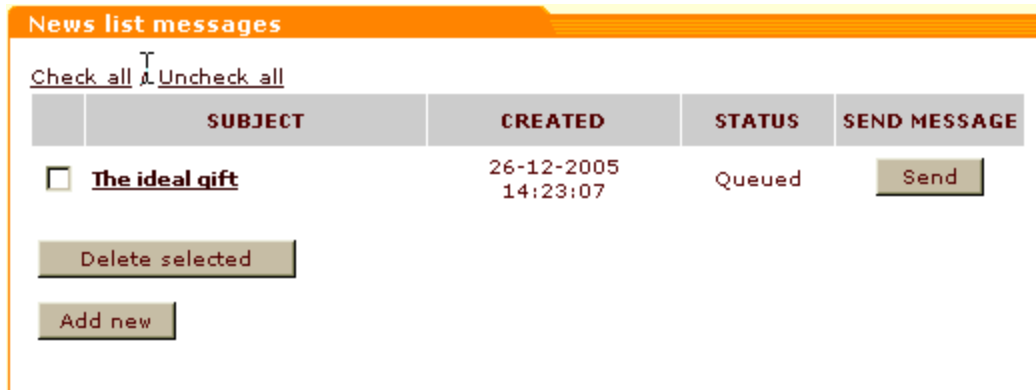
**Send test to E-Mails:**

6. Click the **Save** button. The created message gets added to the list of news list messages. After an automatic page refresh, you should see an information box with a confirmation message.

If you have specified any email addresses for sending a test newsletter, the message gets sent to these email addresses as soon as you click the **Save** button.

To view the newly created news message added to the list of messages for the news list, click the

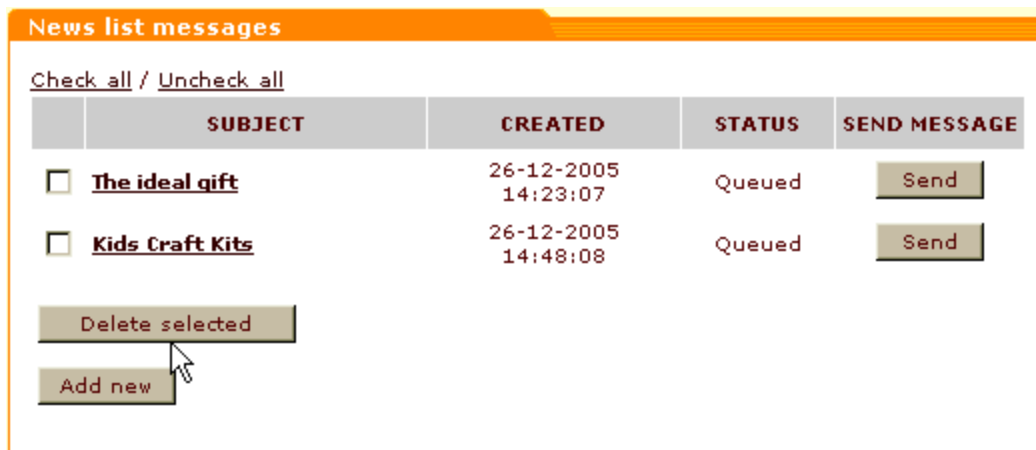
Messages link in the 'News Management' section menu at the top of the page. The added message should look something like this:



## Managing news list messages

You can view/modify the details of any news messages, delete news messages and send news messages to newsletter subscribers.

All the operations on messages of a specific news list can be performed using the 'News list messages' dialog box:



To view/modify a news message:

1. Open the 'News list messages' dialog box.
2. In the list of news messages, find the message you wish to view/modify.
3. Click on the subject of the message. This should open the 'News list message details' form with the message details.

4. Modify the necessary details.
5. Click on **Save**. The message should be updated. You should see an information box with a confirmation message.

To delete one or more news message from a news list:

1. Open the 'News list messages' dialog box.
2. In the list of news messages, find the messages you wish to delete and select the check boxes next to them.
3. Click the **Delete selected** button. The selected messages should be deleted. You should see an information box with a confirmation message.

To send a news list message to newsletter subscribers:

1. Open the 'News list messages' dialog box.
2. In the list of news messages, find the news message you wish to send to newsletter subscribers.
3. Click the **Send** button opposite this message. The message should be sent. You should see the status '*Queued*' change to '*Sent*' for this message.

A sent message can be sent again by clicking on the **Resend** button.

## 8.21 Order Tracking

### What Order Tracking module does

If you use UPS, USPS, FedEx or Australia Post postal services to ship products to customers, the module Order Tracking allows you to track your shipments.

Every parcel that is shipped by the above named services gets a tracking number. The module Order Tracking enables you to assign the tracking numbers you get from these services to specific orders.

As soon as you get a tracking number for your shipment, you enter it into the details of the corresponding order using the 'Tracking number' field of the 'Order details' form (Admin or Provider zone):

Tracking number:

Then, you save the changed order details, and this is it. As the order is transported to the buyer, you can track it using the **Track It!** button in the same 'Order details' form:

**Track It!**

Clicking this button you will be redirected to United Parcel Service site.

When you click this button, the module redirects you to the site of the appropriate postal service. There you can find all the necessary information regarding your shipment.

## Importing order tracking numbers

If you are a UPS customer shipping from your own location, you are very likely using UPS's own software - UPS Online WorldShip - to record the shipments.

To be able to use UPS Online WorldShip software for orders created in X-Cart, you need to do the following:

1. When you are ready to ship an order, export the order information from X-Cart to a CSV file.
2. Download the created CSV file onto your machine.
3. Use UPS Online WorldShip Connection Assistant to map the fields in the X-Cart-exported CSV file to the corresponding fields within WorldShip and import the order data into WorldShip.
4. Allow WorldShip to process the order data communicating with UPS server.
5. Export the resulting data from WorldShip. The result will be a CSV file in the format suitable for importing into X-Cart.
6. Re-import the CSV file back into X-Cart through the 'Import order tracking numbers' section.

**Note:** Please note that of the fields contained in the CSV file exported from WorldShip only two are mandatory for importing into X-Cart: 'PackageReference1' (corresponds to X-Cart's OrderId) and 'PackageTrackingNumber' (corresponds to the tracking number assigned to the order by UPS).

If you edit the CSV file before importing into X-Cart, please make sure the said two fields are intact and go in the first two columns.

**Note:** For help with technical questions on UPS Online WorldShip, consult the Help system provided with UPS Online WorldShip software or contact UPS technical support.

## Roles in Order Tracking module management

If you are an X-Cart GOLD administrator/provider or an X-Cart PRO administrator:

- You can enable/disable Order Tracking module via the Modules section of X-Cart administration back-end (Administration menu->Modules).
- You can assign tracking numbers to orders and track order shipments.

If you are an X-Cart PRO provider:

- You can assign tracking numbers to orders and track order shipments.

## 8.22 Product Options

### What Product Options module does

If you wish to sell products that differ from one another but slightly (e.g. in color or in size), there's no need to create a separate X-Cart product for each of these variations. Instead, you can treat them as one product and sell them under the same product title. To enable your customers to choose the necessary product variation, you can describe the difference between the variations in terms of *product options* - choices available to select from when ordering a product item. When adding an item to the shopping cart, your customers will choose the desired option or combination of options and thus will let you know which of the variations they want.

The module Product Options allows you to use options for products. Depending on the nature of the product being sold and on the quantity of variations of the product that need to be made available for sale, your approach to defining product options will be different.

The module allows you to define product options of three types: *price modifier*, *product variant* and *custom text field*.

*Price modifier* is an option type that allows you to define how choosing this or that product option modifies the price of the product item. The amount by which the product's price is increased or reduced can be expressed as an absolute or a percentage value.

*Example:*

Product: "Gone With The Wind", a book by Margaret Mitchell

Base price: \$7.99

Options: Paperback (base price), Hardcover (+ \$19.01).

Prices of product variations (based on the product base price modified by options):

Paperback - \$7.99,

Hardcover - \$27.00 (= \$7.99 + \$19.01)

Options of the price modifier type are good for describing features that can be made available to the customer on demand (like gift wrap, or anything that you can obtain as soon as a customer orders it - for example, red color for a t-shirt, provided you are the t-shirt producer and red is one of the standard colors that you use for t-shirts).

*Product variant* is an option type that helps you define all the possible combinations of product options available in specific product items. Product variations treated as product variants can have their own SKUs, prices, weights and product images, and you can track their quantity in stock separately.

*Example:*

Product: T-shirt

Options:

Color: White, Blue

Size: S, M, L, XL

Product variants:

White + S      Blue + S

White + M      Blue + M

White + L      Blue + L

White + XL     Blue + XL

*Custom text field* is an option type that facilitates customization and personalization for product items. It enables customers to provide a detailed description of the options they wish to go with the item. For example, when a customer purchases a product item as a gift for someone else, he or she might want a card to be sent along with it; a custom text field in the list of the item's options would be a nice way to allow the customer to create a custom card message.

## Roles in Product Options module management

If you are an X-Cart GOLD administrator/provider or an X-Cart PRO administrator:

- You can enable/disable Product Options module and adjust its configuration settings (See [Enabling and Configuring 'Product Options'](#)).
- You can create and manage options of any type for any product in the store (See [Managing Product Options](#)):
  - [add product option groups and define specific option values](#);
  - [manage product option groups and specific option values](#).
- You can define product option exceptions to disable certain combinations of product options (Study [Managing Product Option Exceptions](#)).
- You can define properties (prices, weights, stock quantities) of previously created product variants and add images for them (See [Managing Product Variants](#)).

If you are an X-Cart PRO provider:

- You can create and manage options of any type for any of your products (See [Managing Product Options](#)):
  - [add product option groups and define specific option values](#);
  - [manage product option groups and specific option values](#).
- You can define product option exceptions to disable certain combinations of product options (Study [Managing Product Option Exceptions](#)).
- You can define properties (prices, weights, stock quantities) of previously created product variants and add images for them (See [Managing Product Variants](#)).

## 8.22.1 Enabling and Configuring 'Product Options'

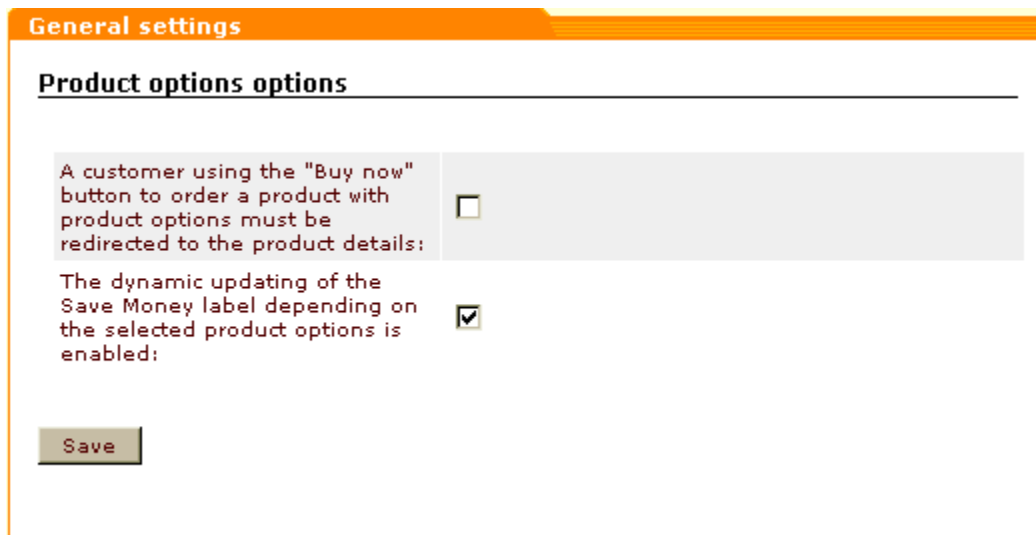
To begin using the module:

1. Enable Product options module (Administration menu->Modules).

When the module is enabled, you can see:

- a) Product options link in the 'Product Management' section menu (when a product is opened for editing);
- b) Product options options section in General settings/Modules options.

2. Adjust the module settings via General settings/Modules options->Product options options.



The screenshot shows a web interface for configuring product options. At the top, there is a header 'General settings' in an orange bar. Below it, the title 'Product options options' is displayed. The main content area contains two settings, each with a text description and a checkbox:

- The first setting has the text: "A customer using the 'Buy now' button to order a product with product options must be redirected to the product details:". The checkbox next to it is unchecked.
- The second setting has the text: "The dynamic updating of the Save Money label depending on the selected product options is enabled:". The checkbox next to it is checked.

At the bottom left of the settings area, there is a 'Save' button.

- a) If you wish a customer using the "Buy now" button to order a product with product options to be redirected to the 'Product details' page, select the check box 'A customer using the "Buy now" button to order a product with product options must be redirected to the product details'. Leave the check box unselected to allow the customer to be redirected to the cart page, as usual (To edit the options of a product added to the cart, the customer will have to use the 'Edit options'



link.)

- b) If you wish the Save Money label on the 'Product details' page to be dynamically updated depending on the product options selected by a customer, select the check box 'The dynamic updating of the Save Money label depending on the selected product options is enabled'. Leave the check box unselected if you wish the Save Money label value to depend solely on the base price of the product.
- c) Click on **Save**.

## 8.22.2 Managing Product Options

### Adding option groups

Before you start defining any product options, a few words need to be said about product option groups.

You might already have guessed that individual product options like *white*, *blue*, *S*, *M*, *L*, *XL*, *paperback* or *hardcover* do not go into X-Cart unsorted. For a customer who decides to purchase a color t-shirt, it would be natural, firstly, to think, what properties of a t-shirt would be essential (for most people, these are likely to be *size* and *color*), and then to decide, how exactly these properties need to be expressed in the t-shirt being purchased (for example, *XL* and *red*). When defining options for products, you will want to adopt a similar approach, so your customers will find your options easy to understand and use. X-Cart's approach to creating product options stands in accord with this allowing you to proceed naturally from stating the product's property that needs to be defined (for example, *size*) to providing values by means of which the property can be defined (for example, *S*, *M*, *L*, *XL*). This means that any options that you create in your store are created not independently, but in groups (for example, a group of options defining *size*, a group of options defining *color*, etc). To add product options means to add a *product option group* and (in the case of price modifier and product variant option types) to define individual *option values* that will be available within this group. Note that, in the case of the custom text field type, you do not define any option values, as the value is to be defined by the customer.

To add a *price modifier/product variant/custom text field* product option group for a specific product:

1. Find the product for which you wish to define price modifier product options, product variants or a custom text field. Open this product for modification.
2. In the 'Product Management' section menu, click the link 'Product Options'. This opens the section of your store that allows you to define and edit product options for the product being viewed/modified. If you have not yet defined any options for the product, you should be able to see a dialog box titled 'Add new option group':

Add new option group

**Option group name:** \*   
Each option group must have a unique name

**Option text:** \*   
This text will be displayed on the customer's frontend

**Option group type:**

**OrderBy:**

**Availability:**

**Options list:**  
Leave it empty if you chose 'Custom text field' as an option group type  
Example:  
Red=-4%  
Blue=+5  
Brown

If you have already added at least one option group, you should be able to see a dialog box 'Product option groups'. To access the 'Add new option group' dialog box from the 'Product option groups' list, click the **Add new** button.

### 3. Adjust the fields of the 'Add new option group' dialog box:

#### *Price modifier type:*

- Option group name - Name by which the option group will be identified in the 'Product option groups' list.
- Option text - Description of the option group that will appear on the 'Product details' page of the Customer zone as the name of the field from which your customers will select specific option values.
- Option group type - Type of the options that will be created within the group (Select *Price modifier*).
- OrderBy - Numeric value defining the position of the option group field relative to the other option group fields that will be displayed on the same 'Product details' page .
- Availability - Check box defining the availability of the option group to customers (Selecting the

check box makes the option group field visible in the Customer zone and enables your customers to select option values from this group. Unselecting the check box hides the option group field from the Customer zone).

- Option values list - Specific option values from which your customers will be able to choose when ordering the product.

Enter one option per line and press ENTER after each option to create a new line.

For options that are not going to modify the product's price, simply enter option names. For options that will make the product's price cheaper or more expensive, describe how exactly the product's price is going to be changed if the option is selected. Use the symbols = (equals), + (plus), - (minus) and % (percent).

*For example, if you were selling color t-shirts:*

'White' would mean 'Choosing the color *white* will not affect the price of the t-shirt'.

'Red=+3%' would mean 'A *red* t-shirt will be 3% more expensive than a white t-shirt'.

**Add new option group**

**Option group name:** \*   
Each option group must have a unique name

**Option text:** \*   
This text will be displayed on the customer's frontend

**Option group type:**

**OrderBy:**

**Availability:**

**Options list:**  
Leave it empty if you chose 'Custom text field' as an option group type  
Example:  
Red=-4%  
Blue=+5  
Brown

White  
Blue=+3%

*Product variant type:*

- Option group name - Name by which the option group will be identified in the 'Product option

groups' list.

- Option text - Description of the option group that will appear on the 'Product details' page of the Customer zone as the name of the field from which your customers will select specific option values.
- Option group type - Type of the options that will be created within the group (Select *Product variant* ).
- OrderBy - Numeric value defining the position of the option group field relative to the other option group fields that will be displayed on the same 'Product details' page .
- Availability - Check box defining the availability of the option group to customers (Selecting the check box makes the option group field visible in the Customer zone and enables your customers to select option values from this group. Unselecting the check box hides the option group field from the Customer zone).
- Option values list - Specific option values from which your customers will be able to choose when ordering the product.

Enter one option per line and press ENTER after each option to create a new line.

As product variants' prices are defined on a separate page, you just need to define option names.

Add new option group

**Option group name:** \*   
Each option group must have a unique name

**Option text:** \*   
This text will be displayed on the customer's frontend

**Option group type:**

**OrderBy:**

**Availability:**

**Options list:**  
Leave it empty if you chose 'Custom text field' as an option group type  
Example:  
Red=-4%  
Blue=+5  
Brown

White  
Blue

*Custom text field type:*

- Option group name - Name by which the custom text field option being created will be identified in the 'Product option groups' list.
- Option text - Description of the option that will appear on the 'Product details' page of the Customer zone as the name of the custom text field.
- Option group type - Type of the option (Select *Custom text field*).
- OrderBy - Numeric value defining the position of the custom text field relative to the other option group fields that will be displayed on the same 'Product details' page .
- Availability - Check box defining the availability of the option to customers (Selecting the check box makes the custom text field visible in the Customer zone and enables your customers to enter text into it. Unselecting the check box hides the custom text field from the Customer zone).
- Option values list - *the field is inactive, as custom text fields are not supposed to provide options to select from.*

### Add new option group

**Option group name:** \*   
Each option group must have a unique name

**Option text:** \*   
This text will be displayed on the customer's frontend

**Option group type:**

**OrderBy:**

**Availability:**

**Options list:**  
Leave it empty if you chose 'Custom text field' as an option group type  
Example:  
Red=-4%  
Blue=+5  
Brown

4. Click the **Add option group** button. You should see an Information box with a confirmation message. This means the option group has been added to the list of product option groups.

Now you can edit the details of the option group, add a translation for the option group, view the list of available option groups or add another option group.

To edit the option group details, scroll down to the bottom of the page, on which the Information box is displayed. Use the dialog box titled 'Update option group' to change any details that need to be changed and click the **Update option group** button to save the changes.

To add a translation for the option group, from the language selector located at the top right-hand corner of the 'Update option group' dialog box select a language in which you wish to add a translation, replace the values displayed in the dialog box fields by values in the selected language and save the changes. For information on product option translations, see [Multilingual product options](#) further in this section.

To view the list of product option groups, click the link [Back to option groups list](#) at the top of the 'Update option group' dialog box.

To add another product option group, click the link [Add new option group](#).

(If you created a Product variant option group) To set prices, weights and stock quantities for the individual product variants within the created option group, go to the 'Product variants' section (Click the link 'Product variants' in the 'Product Management' section menu). For information on managing product variants, refer to [Managing Product Variants](#) further in this section of this manual.

## Managing product option groups and product option values

Previously created product option groups can be viewed in the 'Product option groups' dialog box, which is available in the 'Product Options' section:

**Product option groups**

Below you can see a list of product option groups. You can use this section to update the position and availability of option groups, as well as to add new groups and delete the groups you do not need. Click on an option group title to edit the option group details.

[Check all](#) / [Uncheck all](#)

	#	OPTION CLASS	OPTION TYPE	ORDERBY	AVAILABILITY	OPTIONS LIST
<input type="checkbox"/>	456	<a href="#">Color</a>	Product variant	<input type="text" value="1"/>	<input checked="" type="checkbox"/>	White Blue
<input type="checkbox"/>	457	<a href="#">Size</a>	Product variant	<input type="text" value="2"/>	<input checked="" type="checkbox"/>	S M L XL
<input type="checkbox"/>	458	<a href="#">T-shirt back message</a>	Custom text field	<input type="text" value="3"/>	<input checked="" type="checkbox"/>	Options list is empty.
<input type="checkbox"/>	459	<a href="#">Gift wrap</a>	Price modifier	<input type="text" value="4"/>	<input checked="" type="checkbox"/>	No Yes 1.00 \$

The table columns provide the following information regarding each of the listed product option groups:

# - CLASSID number (a unique number generated automatically and assigned to a product option group for the purpose of identification).

OPTION CLASS - Name of the option group.

OPTION TYPE - Type of the option group (Price modifier, Product variant, Custom text field).

ORDERBY - Numeric value defining the position of the product option group relative to the other product option groups of the same product (affects the order of product option groups in the 'Product option groups' list and the order of option fields on the 'Product details' page of the product in the

Customer zone.

AVAILABILITY - Check box defining the availability of the product option group to customers (Selecting the check box makes the corresponding product option group field visible in the Customer zone. Unselecting the check box hides the option group field from the Customer zone, but leaves it available for editing in the store back-end).

OPTIONS LIST - List of option values defined in the option group.

The controls of the 'Product option groups' dialog box allow you to perform certain operations on existing product option groups.

To change the order of the product option groups, edit the values in the ORDERBY column for all the groups whose position needs to be changed and click the **Update** button.

To change the availability status of a product option group, change the value of the AVAILABILITY check box opposite its name and click the **Update** button.

To delete a product option group, select the check box opposite its name and click the **Delete selected** button.

To modify an option group:

1. Click on the option name link in the 'Product option groups' dialog box. This should open a dialog box 'Update option group' allowing you to edit the parameters of the product option group and to change the set of option values included into the option group.
2. If necessary, edit the parameters of the product option group:
  - a) Edit the values of the 'Option group name', 'Option text', 'Option group type', 'OrderBy' and 'Availability' fields.
  - b) Click the **Update option group** button to save the changes.
3. If necessary, edit the set of option values in the 'Options list' section.

To change an existing option value in a group of the product variant type, adjust the fields in the following columns:

OPTION VALUE - Name of the option value.

ORDERBY - Number reflecting the position of the option value within the option group.

AVAILABILITY - Availability of the option value to customers.

For the price modifier type, in addition to the columns OPTION VALUE, ORDERBY and AVAILABILITY, which have the same meaning as in the Product variant type, also adjust the fields in these columns:

OPTION - Number defining the amount by which the product's price is modified. Can be positive (like "3.00") for mark-ups or negative (like "-3.00") for discounts.



SURCHARGE - Type of the surcharge (*Absolute* or *Percent*).

If you wish to remove one or more of the option values from the option group being edited, select the check boxes to the left of those option values that need to be removed and click the **Delete selected** button.

To add some more option values, first add the desired number of field rows in the 'Add option value' subsection using the **Add row** button, then complete these fields and save the changes using the **Update option group** button (Rows created on accident, which do not need to be added to the options list, can be removed by clicking the **Remove row** button in the respective rows).

After editing any values in the 'Options list' subsection, be sure to click the **Update option group** button to save the changes.

### Multilingual product options

If your store supports more than one languages, you need to provide translations of your product option groups into all the languages supported by your store.

**Note:** The recommended workflow for defining product options in a multilingual store is to create product options in the default admin language (defined in the 'Languages' section of the Admin zone) and then translate them into other languages. This is essential because product options first created in a language other than the default admin language will have empty names in the default admin language.

Translations for any option group can be added at any time after the creation of the option group is completed.

To add a translation for a product option group:

1. Open the details of the product option group so you can edit them using the 'Update option group' dialog box.
2. Use the language selector located in the 'Update option group' dialog box to select the language in which you wish to add a translation. The interface changes to the selected language.
3. Replace the values of the fields 'Option group name', 'Option text' and, if necessary, 'Options list' with new values in the selected language.
4. Click the **Update option group** button to save the changes.

## 8.22.3 Managing Product Option Exceptions

### Product option exceptions

When using more than one option groups of the price modifier or product variant types for one product, not

all the possible combinations of the options may be actually available. This problem can be handled by setting up exceptions. An exception is a combination of options with which a product cannot be added to the shopping cart.

*Example:*

You sell t-shirts available in two colors: white and blue. White t-shirts are available in four sizes: S, M, L and XL. Blue t-shirts are available in the sizes S, M, L, but not available in XL.

You set up product variants for the product T-shirt, defining the product option groups as follows:

Color: White, Blue  
Size: S, M, L, XL

This leaves you with all the t-shirts available in all the sizes. However, you do not want to allow your customers to order blue XL t-shirts, as there is not such a thing. So, you need to disable the combination 'blue + XL'.

A good way to handle that is to add the said combination to the list of product option exceptions. Then, when a customer selects the color blue and the size XL for a t-shirt, the page will display a message saying that the selected combination of options is unavailable. If, regardless of the message, the customer attempts to add the product to the cart without first changing the options, he or she will get a JavaScript warning pop-up with the same message and will not be allowed to proceed to checkout until the options are readjusted.

### Adding product option exceptions

To add a combination of options to the list of product option exceptions:

1. In the 'Product Options' section, scroll down to the dialog box titled 'Product option exceptions':

The 'Add exception' section of the dialog box contains some drop-down boxes titled by the names of the defined option groups.

2. Use the drop-down boxes to create the unavailable combination of options (In the above example, you would have to select *Blue* from the box titled 'Color' and *XL* from the box titled 'Size').
3. Click the button **Add exception**.

The combination gets added to the list of unavailable option combinations in the upper section of the 'Product option exceptions' dialog box:

### Product option exceptions

Product option exceptions allow you to define option combinations that are not available.

OPTIONS COMBINATION
<input type="checkbox"/> Color: Blue Size: XL

#### Add exception

Color:

Size:

### Deleting product option exceptions

To delete one or more product option exceptions:

1. In the list of product option exceptions, select the check boxes next to the exceptions that need to be removed.
2. Click the **Delete selected** button.

### Product options validation

The dialog box titled 'Validation script (Javascript)', which is located in the 'Product Options' section, allows you to provide JavaScript validation for product options. The text area provided in this dialog box is intended for adding JavaScript code that you wish to be called when a customer selects a certain combination of options.

### Validation script (Javascript)

Below you can write a client-side Javascript code that will be launched when a customer decides to add a product to cart and starts selecting options with which the product should be added. This script will validate the selection of options and warn the customer if the selected option combination is unavailable without page reloading. You need to have skills in Javascript programming to avoid errors on the customer frontend.

Validation JavaScript code can be typed into the text area of the 'Validation script (Javascript)' dialog box directly or pasted from clipboard. To save the code entered into the text area, click the **Update** button.

For example, talking about the same t-shirts and the combination of options that we chose to be unavailable (Blue + XL), you may wish to add some code that would produce a JavaScript warning (like "Sorry, the combination of Blue and XL is not available currently. Please check back later") on the screen when someone tries to add a blue XL t-shirt to the cart.

The following code sample highlights the use of JavaScript for creating a JavaScript warning:

```
var value = product_option_value("Color");
var value2 = product_option_value("Size");
if (value !== false && value == "Blue" && value2 !== false && value2 == 'XL')
    alert("Sorry, the combination of Blue and XL is not available currently.
check back later");
return false;
}
```

In the above code sample, *Color* and *Size* are option group names in the default admin language, *Blue* and *XL* - names of specific option values in the default admin language (Note that some users may prefer using ClassId numbers instead of option group names).

The `return false` statement at the end stops the submission of the form, which results in the product not getting added to the cart. However, if we use `return true` instead, the warning message becomes merely informative and the customer is allowed to proceed to checkout.

It is possible to create different scenarios for different languages:

```
if (store_language == "FR") ...
```

Please note that names of product option groups and option values contained in your validation code need

to be kept in sync with the descriptions of the respective option groups in the language that is the store's default admin language. This means that if some of your product option groups (and - along with that - option values) change their names in the default admin language, you will have to replace the names contained in the validation code by the new names and update the code in order to keep your validation script functional. You should understand that a change of option group/option value names may occur not only as a result of direct editing of the names in the group details, but also as a result of internal processes which may be caused by actions seemingly unrelated to editing of option group or option value names. An example of the latter case may be a change of the name of a product option group and all the names of option values within that group as a result of updating the option group after changing the store's default admin language.

To better understand the interdependencies, consider the following situation:

Your store has German for the default admin language. The interface of the back-end you are currently using is in German, and you create a product option group named 'Größe' (the German word for 'Size').

Next, you add an English translation for the group, and in that translation the name of the group is, naturally, 'Size'.

You also create a validation script in which you refer to the option group as 'Größe'.

So far so good.

Then at some point you decide you want English to be your store's default admin language, not German, so you readjust the default admin language. At first, after the language change, your script based validation continues functioning correctly. However, one day your validation suddenly stops working. What happened?

Most probably, after the change of the default admin language, you used an English interface to view the details of the product option group in question and, intentionally or accidentally, updated the option group details by clicking the **Update** option group button. As at that time English was already your store's default admin language, clicking the button while the current interface was in English caused all the German names in the original description of the option group (including 'Größe') to be replaced by English equivalents from the English description.

So, in fact, it is natural that your validation script has stopped working: the group name used in the validation script code is still 'Größe', while the correct identifier of the option group is now 'Size'.

## 8.22.4 Managing Product Variants

Individual option values from different option groups of the product variant type are joined by X-Cart to form *product variants* (T-shirts: Blue+S, Blue+M, Blue+L, Blue+XL, etc).

A product's list of variants can be viewed at any moment after the necessary option groups are defined:

1. Open the product for modification.
2. In the 'Product Management' section menu, click the link 'Product Variants'.

The 'Product Variants' dialog box that is displayed at this point allows you to view the product's variants and to adjust their specific properties.

For example, if you set a product's details as follows:

```
Product details:  
Product name: T-shirt  
SKU: SKU17430  
Price: $14.99  
Weight: 1 lbs  
Quantity in stock: 100  
Product options:  
Color: White, Blue  
Size: S, M, L, XL
```

in the 'Product variants' section you should see something like this:

**Product variants**

You can use filtering to reduce the number of variants displayed in this section. To view a full size image of a specific variant, click on the image icon. Use the checkboxes on the left to update thumbnails/product images for the selected variants.

[+ Filter product variants](#)

[Check all](#) / [Uncheck all](#)

	VARIANTS	IMAGE	SKU	WEIGHT	QUANTITY IN STOCK	PRICE	DEF
<input type="checkbox"/>	Color: White Size: S		SKU17430	1.00	100	14.99	<input type="radio"/>
<input type="checkbox"/>	Color: Blue Size: S		SKU17430	1.00	100	14.99	<input type="radio"/>
<input type="checkbox"/>	Color: White Size: M		SKU17430	1.00	100	14.99	<input type="radio"/>
<input type="checkbox"/>	Color: Blue Size: M		SKU17430	1.00	100	14.99	<input type="radio"/>
<input type="checkbox"/>	Color: White Size: L		SKU17430	1.00	100	14.99	<input type="radio"/>
<input type="checkbox"/>	Color: Blue Size: L		SKU17430	1.00	100	14.99	<input type="radio"/>
<input type="checkbox"/>	Color: White Size: XL		SKU17430	1.00	100	14.99	<input type="radio"/>
<input type="checkbox"/>	Color: Blue Size: XL		SKU17430	1.00	100	14.99	<input type="radio"/>

**Edit selected images:**

The column VARIANTS shows all the possible combinations of options that form variants of the product.

**Note:** If not all of the combinations listed in the 'Product variants' section are actually available, you can use product option exceptions and/or product options validation to disallow customers from ordering the unavailable ones.

The link [\[+\] Filter product variants](#) allows you to reduce the number of product variants displayed on the page.

The fields in the SKU, WEIGHT, QUANTITY IN STOCK and PRICE columns allow you to edit the respective values for each of the listed variants, while the controls of the 'Edit selected images' subsection allow you to manage the product images of specific variants.

When you first enter the 'Product variants' page, the values displayed in the WEIGHT, QUANTITY IN STOCK and PRICE columns equal those of the base product ('Weight', 'Quantity in stock' and 'Price' fields on the 'Product details' page), while the SKU values represent the slightly modified SKU of the

base product. You can keep the suggested values or change them according to your needs. If you choose to change any values, be sure to click the **Update** button to save the changes.

The column IMAGE is intended for icons of product variant images. Initially, this column contains only 'No image available' icons. A 'No image available' icon opposite a specific product variant means that a product image for that product variant has not been defined. If you do not add an image specifically for a product variant, the product image of the base product will be displayed to the customer when the variant is selected. To add an image for a product variant, select the check box next to that variant (or - if you wish to apply the same image to several variants - select the check boxes next to all the variants to which the image needs to be applied), click the **Add/Update** button in the 'Edit selected images' line and use the 'Image selection' window to select an image to be added. After the selected image appears in the IMAGE column, click on **Update** to apply. Before the **Update** button has been clicked, you can cancel the application of the selected image by clicking on **Reset**. It is also possible to remove the previously added images: unselect the check boxes next to the variants for which the images need to be removed and click the **Delete** button.

The column DEF allows you to set the product's *default* variant - a variant whose options are to be shown in the 'Products list' and on the 'Product details' page by default. To set a specific variant as default, select the radio button opposite it and click the **Update** button.

**Note:** if you have Wholesale Trading module enabled, you can modify wholesale prices for selected product variants. Read more on how to do it in the section "[Setting Wholesale Prices For Product Variants](#)".

## 8.23 QuickBooks

### What QuickBooks module does

This module enables you to export orders in IIF (QuickBooks 2002, 2003) format.

### 8.23.1 Enabling and Configuring 'QuickBooks'

To begin using the module:

1. Enable QuickBooks module (Administration menu->Modules).

When the module is enabled, you can see QuickBooks options section in General settings/Modules options.



2. Adjust the module settings via General settings/Modules options->QuickBooks options:

**General settings**

---

**QuickBooks options**

Transactions class name.:	<input type="text" value="Website:Retail"/>
The name of the income account you use to track taxes. The type of this account should be INC.:	<input type="text" value="Website:Tax"/>
The name of the income account you use to track product sales. The type of this account should be INC.:	<input type="text" value="Sales:Product"/>
The name of the income account you use to track Gift Certificate sales. The type of this account should be INC.:	<input type="text" value="Sales:Gift Certificate"/>
The name of the income account you use to track discounts by Gift Certificates. The type of this account should be INC.:	<input type="text" value="Sales:Gift Certificate Discoun"/>
The name of the income account you use to track shipping cost. The type of this account should be INC.:	<input type="text" value="Sales:Shipping"/>
The name of the income account you use to track discounts. The type of this account should be INC.:	<input type="text" value="Sales:Discount"/>
The name of the income account you use to track discounts by Discount Coupons. The type of this account should be INC.:	<input type="text" value="Sales:Coupon Discount"/>
The name of the asset account for the inventory items:	<input type="text" value="Inventory Asset"/>
Declare order products as inventory items:	<input checked="" type="checkbox"/>
The minimum quantity of inventory items you want to keep in stock at any time:	<input type="text" value="0"/>
The name of the COGS account for the inventory items:	<input type="text" value="Cost of Goods Sold"/>
Export information about processed orders:	<input checked="" type="checkbox"/>
Order number prefix for identification of transactions in Quickbooks.:	<input type="text"/>

3. Click on **Save**.

## 8.24 Recommended Products

### What Recommended Products module does

The module Recommended Products enables an auto-generated recommended products list. This list is displayed on the Product details page of any product in the store.

**Recommended products list**

Customers who bought this product also bought the following products:

- **Spring Faitout**
- **Universal Car Charger**
- **Labtec Spin-55 Black**
- **T-Shirt with pocket (summer colors)**
- **Compaq iPAQ H3130**
- **Scary Movie 2**
- **Antec Plus660-AMG Metallic Gray**
- **Solid tank**
- **Motherboard P3APA VIA 694, UltraDMA 66, AGP 4x, 133Mhz FSB**
- **Palm OS m125**

## 8.25 Shipping Label Generator

### What Shipping Label Generator module does

X-Cart's Shipping Label Generator module allows you to create and print shipping labels for orders whose shipping option is defined as UPS, USPS or DHL/Airborne and uses real-time calculated shipping rates.

You probably already know that X-Cart has a standard functionality for generating shipping labels: the button **Quick labels for selected** in the Orders Management section allows administrator and provider users to create shipping labels for selected orders. The process of generating the labels is very quick, as it is performed by X-Cart internally, without exchanging any data with the servers of carrier companies.

The disadvantage of quick labels is that they have the most basic design and do not provide such all-round information about shipments as can be provided by shipping labels generated by specialized software. Shipping Label Generator module is an extension to X-Cart's shipping label printing functionality that provides you the ability to create good-looking and information-rich shipping labels for the most popular

shipping methods like UPS, USPS or DHL/Airborne.

To use the module, you need to have accounts with those shipping services for which you want to be able to get shipping labels. The account information is entered into X-Cart and is stored there permanently so the module can use it automatically. When you tell the module to generate a shipping label, the module uses your account information to contact the respective shipping service server or (in the case of UPS) to generate a CSV-formatted data file that can be imported into an external program that will contact the shipping label generating server of the shipping service provider company. The shipping service server processes the information received from X-Cart, generates the required shipping label and sends it back to the application that has submitted the request (X-Cart for USPS and DHL/Airborne; UPS WorldShip for UPS). After that you can freely download the shipping label onto your computer and print it out.

**Note:** please remember that shipping labels can be generated only for real-time calculated shipping methods.

## Roles in Shipping Label Generator module management

If you are an X-Cart GOLD administrator/provider or an X-Cart PRO administrator:

- You can enable/disable the module Shipping Label Generator and adjust its configuration settings (See [Enabling and Configuring 'Shipping Label Generator'](#)).
- You can generate/regenerate shipping labels for any orders in the store (Study [Generating Shipping Labels](#)).

If you are an X-Cart PRO provider:

- You can generate/regenerate shipping labels for any of your orders (Study [Generating Shipping Labels](#)).

### 8.25.1 Enabling 'Shipping Label Generator'

To begin using the module:

1. Ensure that your X-Cart store can communicate with the servers of the carrier companies whose shipping labels you will need for your orders:
  - a) You need to have a valid account with each shipping service that you are going to use for generating shipping labels.
  - b) The account details need to be specified in your X-Cart:
    - *USPS*: Adjust the fields of the 'U.S.P.S. account details' subsection of the 'General settings/Shipping options' dialog box.
    - *DHL/Airborne*: Adjust the fields of the 'DHL/Airborne account details' subsection of the 'General settings/Shipping options' dialog box. (If you are intending to generate DHL/Airborne

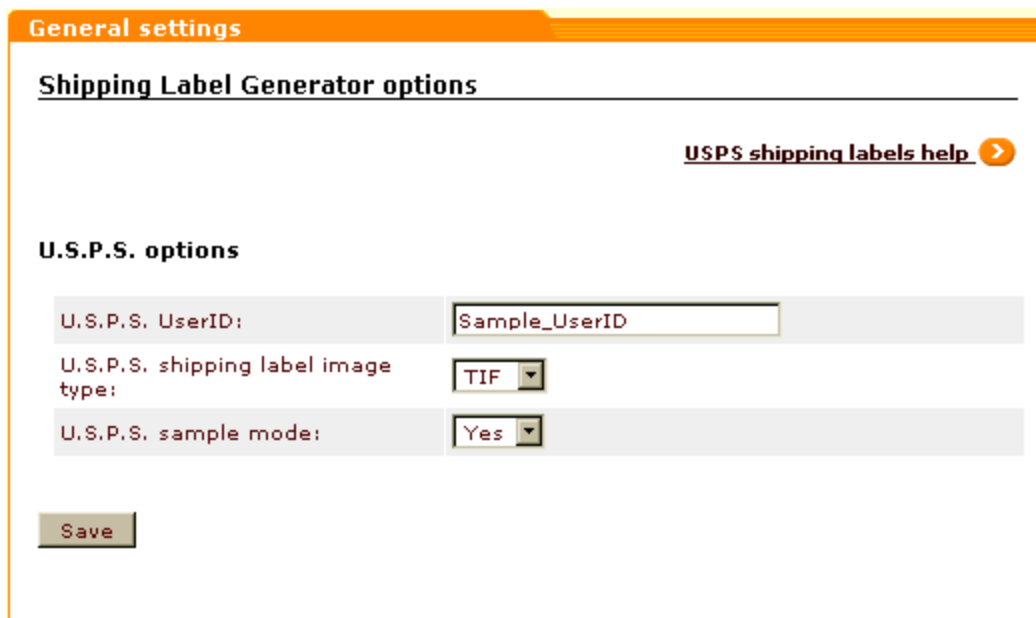
shipping labels in test mode, be sure to enable the option 'Use DHL/Airborne test server'. For live (production) mode, disable the option).

- *UPS*: Enable and configure X-Cart's UPS Online ® Tools module.

2. Enable Shipping Label Generator module (Administration menu->Modules).

After the module is enabled, a section titled Shipping Label Generator options will be added to General settings/Modules options.

3. Adjust the module settings via General settings/Modules options->Shipping Label Generator options.



**General settings**

### Shipping Label Generator options

[USPS shipping labels help](#)

**U.S.P.S. options**

U.S.P.S. UserID:

U.S.P.S. shipping label image type:

U.S.P.S. sample mode:

At present, you only need to adjust Shipping Label Generator options if you are going to generate shipping labels for USPS. Provide the following values:

- U.S.P.S. UserID: User ID that you received from USPS as a result of completing USPS registration process (For instructions on completing USPS registration, read the help section available through the link 'USPS shipping labels help').
- U.S.P.S. shipping label image type: Image type for your USPS shipping labels. Depending on your selection, the shipping labels generated by USPS Web Tools server will be either in TIF or PDF format.
- U.S.P.S. sample mode: An option that sets the module to work either in test or live mode. If you need to generate sample USPS labels, set the drop-down box to *Yes*. If you need production quality labels, select *No*.

Click on **Save**.

## 8.25.2 Generating Shipping Labels

### Generating shipping labels

To generate shipping labels for one or more orders:

1. Go to the 'Orders management' section of the store back-end.
2. Find the orders for which you need shipping labels and select these orders.
3. Click the button **Get shipping labels for selected**.

The labels will be generated. On the next page ('Shipping labels' section) the results will be presented in the form of a table.

**Selected orders**

[Go Back](#)

To obtain a USPS shipping label for an order, download the label image generated by USPS for that order and print it out. To obtain a UPS shipping label, download the CSV file generated by X-Cart, import it into UPS WorldShip, allow UPS WorldShip to generate a shipping label, then print out the resulting label image.

[Check all](#) / [Uncheck all](#)

	ORDER	CUSTOMER	DATE	SHIPPING METHOD	SHIPPING LABEL
<input type="checkbox"/>	<a href="#">#1040</a>	customer	01-02-2007	DHL/Airborne Express 10:30 AM	<a href="#">Download</a>
<input type="checkbox"/>	<a href="#">#1042</a>	j_doe	01-02-2007	USPS Express Mail	<a href="#">Download</a>
<input type="checkbox"/>	<a href="#">#1043</a>	j_doe	01-02-2007	UPS Ground	<a href="#">Download</a>
<input type="checkbox"/>	<a href="#">#1044</a>	cust	07-02-2007	UPS Ground	<a href="#">Download</a>

[Download all shipping labels for UPS](#)

**Note:** The button below allows you to get shipping labels for orders whose shipping method is defined as UPS or USPS.

Update shipping labels for selected

The table columns will provide the following information about each of the orders that you have selected:

- ORDER - Order ID.
- CUSTOMER - Full name and username of the customer who placed the order.
- DATE - Date when the order was created.
- SHIPPING METHOD - Method of delivery selected for the order by the customer.
- SHIPPING LABEL - Shipping label download link (for UPS, USPS or DHL orders) or "n/a" (for orders

with a different shipping option).

Generation of a shipping label for an individual order can also be done from the 'Order details' page of the respective order. To generate a shipping label for an order being viewed, you just need to click the **Shipping label** button at the top of the 'Order details' dialog box. The label will be generated and the result will be presented in the form of a table in the 'Shipping labels' section the same way as when you generate several labels at once.

On the 'Shipping labels' page, the download links in the SHIPPING LABEL column point to files that are either shipping labels or files that can be processed in an external program to obtain shipping labels. The table below provides information on the possible types of files that are generated for different shipping services and gives instructions on how to print shipping labels from these files.

Shipping service	Shipping label file	Instructions on using the shipping label file
USPS	PDF or TIF file (generated by USPS Web Tools server).  The file type (PDF or TIF) depends on the module settings as defined in the 'Shipping Label Generator options' section.	Download the shipping label image file onto your local computer and print it out.
DHL/Airborne	PNG image file (generated by DHL/Airborne server)	Download the shipping label image file onto your local computer and print it out.
UPS	CSV file (generated by X-Cart) - is not a shipping label, but can be used by an external program, UPS WorldShip, to generate a shipping label.	Download the CSV file onto your local computer, import it into UPS WorldShip and allow UPS WorldShip to contact the UPS server that will generate a shipping label based on the information provided. Follow UPS WorldShip instructions on how to print the label.  Download a .pdf file containing the instructions on how to import a CSV file into UPS WorldShip <a href="#">here</a> .

USPS and DHL shipping label download links only make it possible to download individual shipping labels (There is no option that would allow you to download shipping labels for several orders at once). For UPS,

shipping label files for different orders can either be downloaded separately or be combined into a single file and be downloaded at once (The latter option is provided by the link 'Download all shipping labels for UPS').

## Updating shipping labels

X-Cart's Shipping Label Generator module functions in such a way that all order shipping labels that once have been generated in your store remain in the store database unchanged regardless of whether or not you change the details of the respective orders - unless you manually regenerate them. In other words, if you generate a shipping label for a certain order and then modify that order by editing the customer's shipping address, next time you click the button **Shipping label** on the 'Order details' page of that order, you are provided with a download link to the shipping label that was generated before you edited the order details. To get a shipping label with the updated customer address, you need to regenerate the shipping label. Regeneration of shipping labels is easy: on the 'Shipping labels' page, you just need to select the shipping labels that need to be regenerated and click the button **Update shipping labels for selected**. The updated shipping label files become available for download immediately after the 'Shipping labels' page is refreshed.

## 8.26 Simple Mode

### What Simple Mode module does

Simple mode is a module included with X-Cart PRO distribution package only. This module allows you to enable an operational mode in which the Admin and Provider interfaces of your store are combined into one interface. The module works in such a way that any admin accounts existing in the store are disabled, while all provider accounts get administrator privileges. As a result, you no longer have separate admin and provider accounts: when Simple mode is enabled, the Management and Administration menus, typically available just in the Admin zone, appear in the Provider zone along with the Products and Inventory menus.

Simple mode may be useful:

- when an X-Cart PRO-based store is run by one person, and this person wants to have both the admin and provider settings in one interface;
- or*
- when, before a store goes live, one person wants to configure it both for admin and provider without

having to switch endlessly between the Admin and Provider zones.

Using Simple mode in live stores with many providers is hardly reasonable. Of course, you may set up as many provider accounts as you like, and each of these accounts will be able to have its own product set, shipping and tax rates, discounts, etc; however, please be aware that all of the provider account users in your store will have total control over the store configuration and appearance (which means, any modifications regarding the store configuration and appearance made by a specific provider will affect not just his or her section, but the entire store).

**Important:** Simple mode is **not** the same thing as [Single Store mode](#). Simple mode puts together the menus of the Admin and Provider interfaces; Single Store mode allows multiple providers to have a common product set and to use common destination zones, tax rates, shipping rates, discounts, etc.

## Roles in Simple Mode module management

If you are an X-Cart PRO administrator:

- You can enable the module Simple Mode via the Modules section of X-Cart administration back-end (Administration menu->Modules).

**Warning:** Before you enable Simple mode, make sure there is at least one active provider account in your store. You need to have provider access to the store to be able to use the administration back-end.

If you are an X-Cart PRO provider who possesses administrator privileges in a store operating in Simple mode:

- You can disable the module Simple Mode via the Modules section of X-Cart administration back-end (Administration menu->Modules).

## 8.27 SnS connector

### What SnS connector module does

The module Sales-n-Stats connector allows you to integrate your X-Cart-based store with Sales-n-Stats software.

### Roles in SnS connector module management

If you are an X-Cart GOLD administrator/provider or an X-Cart PRO administrator:

- You can enable/disable the module and adjust its configuration settings (Check out [Enabling and](#)



[Configuring 'SnS connector'](#)).

## 8.27.1 Enabling and Configuring 'SnS connector'

To begin using the module:

1. Enable SnS connector module (Administration menu->Modules).
2. Adjust the module settings via General settings/Modules options->Sales-n-Stats connector options:

**General settings**

---

**Sales-n-Stats connector options**

Path to Sales-n-Stats collector (HTTP protocol):	<input type="text"/>
Path to Sales-n-Stats collector (HTTPS protocol):	<input type="text"/>
Extension for the files of Sales-n-Stats collector:	<input type="text" value="php"/>
Shop display name (cannot be empty):	<input type="text" value="Test"/>
Display Live Help button:	<input checked="" type="checkbox"/>
Data collector access passphrase:	<input type="text"/>

- a) Specify the location of your Sales-n-Stats Data Collector:
  - Enter the HTTP URL of your Sales-n-Stats Data Collector;
  - *(If applicable)* Enter the HTTPS URL of your Sales-n-Stats Data Collector.
- b) Depending on the platform of your Sales-n-Stats collector (php or ASP.Net), specify the extension of Sales-n-Stats collector files (*php* or *asp*).

**Note:** For the current version of Sales-n-Stats, only a php-based collector is available, so choose php.

- c) Enter the display name of your shop (If you are going to use your Sales-n-Stats for monitoring more than one shops, this field will help you tell one shop from another).

**Important:** Even if you are going to monitor a single shop, do not leave this field empty.

- d) If you are going to use Sales-n-Stats Live Help functionality, select the 'Display Live Help button' check box.

- e) Enter your passphrase for access to the Data collector.
- f) Click on **Save**.

After installing and configuring the integration module, you will need to import X-Cart-specific settings into your Sales-n-Stats. Please refer to Sales-n-Stats documentation for details.

## 8.28 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.

When the Stop List module is enabled, adjust the module settings via General settings/Modules options->Stop List options.

These are the default settings:

**General settings**

---

**Stop List options**

---

Check if the current set of products in the cart coincides with the product set from an order originating from a blocked IP:	<input checked="" type="checkbox"/>
Maximum transaction from one unique IP address (per day):	<input type="text" value="10"/>
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:	<input type="text" value="10"/>
Failed transaction limit in one session, there is IP address placed in the Stop list:	<input type="text" value="10"/>
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:	<input type="text" value="5"/>
Minimum time of order placement ensuring that the order was placed by a person, not by a script:	<input type="text" value="30"/>
Fail checkout process, if customer proxy is anonymous:	<input checked="" type="checkbox"/>

The option names are self-explanatory, so simply adjust the settings according to your needs.

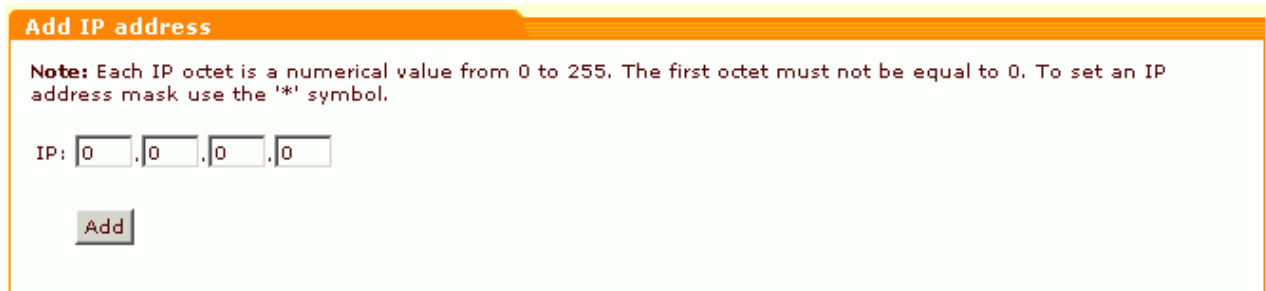
**Important:** please note that customers using anonymous proxy servers will automatically be blocked if you do not switch the last option off.

To access the 'Stop list' section, click on Stop list in the Management menu.

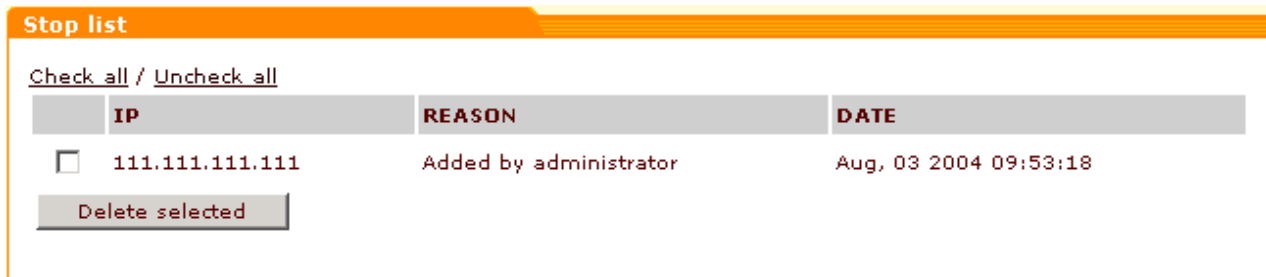
Before you enter any IP addresses to the Stop list, it is empty.



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.



Enter the necessary IP address into the provided form. Click on **Add**. The new IP address will appear in the 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.

Stop list				
<a href="#">Check all</a> / <a href="#">Uncheck all</a>				
IP	REASON	DATE	DETAILS	
<input type="checkbox"/> 111.111.111.111	Added by administrator	Aug, 03 2004 09:53:18	<a href="#">&gt;&gt;</a>	
<input type="button" value="Delete selected"/>				

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.

X-CART. Powerful PHP shopping cart software - Microsoft Internet Explorer

Antifraud service

**Lookup address**

IP:  City: \*

State: \*

Country: \*

Zip/Postal code: \*

The fields marked with \* are mandatory.

Copyright © 2004 Your Company Name

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.

Antifraud service

**Lookup address**

IP:	<input type="text" value="111.111.111.111"/>	City:	* <input type="text" value="Test city"/>
City	La Verne	County:	* <input type="text" value="CA"/>
County	CA	Country:	* <input type="text" value="US"/>
Country	US	Postal code:	* <input type="text" value="50001"/>
Postal code	Unknown		

The fields marked with \* are mandatory.

[Close window](#)

Copyright © 2004 Your Company Name

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).

Antifraud service

**Lookup address**

IP:	<input type="text" value="111.111.111.111"/>	City:	* <input type="text" value="Test city"/>
City	La Verne	County:	* <input type="text" value="CA"/>
County	CA	Country:	* <input type="text" value="US"/>
Country	US	Postal code:	* <input type="text" value="50001"/>
Postal code	Unknown		

Distance: 2340 km

The fields marked with \* are mandatory.

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## 8.29 Subscriptions

### What Subscriptions module does

Subscriptions is an X-Cart module that allows you to use recurring billing. If your store has to deal with regularly scheduled payments (such as membership dues or installment payments), this module can take a load of work off the shoulders of the staff involved with processing them.

With Subscriptions, your customers' accounts can be charged automatically. You specify, which products in your store should be available by subscription, and set up a recurring billing plan for each of these products. A recurring billing plan includes information about the amount and frequency to be charged to a customer's credit card.

**Note:** if you want to use recurring billing, make sure you disable the anonymous checkout option, otherwise the billing cannot be

performed as no credit card data will be stored in the anonymous customer's profile.

When customers order a subscription product, they consent to allow your store take payments from their account at regular periods of time. Then, a special script, which can be launched either manually or automatically, uses the billing information contained in the customers' profiles to charge an appropriate amount to their credit cards. An optional e-mail can be sent to the orders department of your store every time a customer's account is charged to help you monitor your recurring billing transactions.

In any case, using the module reduces processing time and administrative hassle, reduces risk of human error from manual processing and provides you better control over your cash flow.

**Important:** Please be aware that if you want your store to be able to perform periodic billing transactions with Subscriptions module, the values of the `$store_cc` and `$store_cvv2` variables in `config.php` must be set to 'true'.

## Roles in Subscriptions module management

If you are an X-Cart GOLD administrator/provider or an X-Cart PRO administrator:

- You can enable/disable Subscriptions module and adjust its configuration settings (Check out [Enabling and Configuring 'Subscriptions'](#)).
- You can perform all operations regarding subscription management in your store: search for existing subscriptions, view the details of subscription orders, change future pay dates, activate/disable/cancel subscriptions, etc (Study [Managing Subscriptions](#)).
- You can manually charge accounts of customers signed up for a recurring billing plan or set up an external application that will charge these accounts automatically (See [Running\\_admin/pay\\_subscriptions.php](#)).

If you are an X-Cart PRO provider:

- You can specify, which products you would like to be paid for on a recurring basis and set up recurring billing plans for these products (See [Adjusting Setup Fees and Recurring Billing Plans](#)).

### 8.29.1 Enabling and Configuring 'Subscriptions'

To begin using the module:

1. Open the file `config.php` in a text editor. Set the values of the `$store_cc` and `$store_cvv2` variables to 'true'. Save the file.
2. Enable Subscriptions module (Administration menu->Modules).

When the module is enabled, you can see:

- a) Subscriptions item in the Management menu;

- b) Subscriptions link in the 'Product Management' section menu (when a product is opened for editing);
  - c) Subscriptions options section in General settings/Modules options.
3. Adjust the module settings via General settings/Modules options->Subscriptions options.

The screenshot shows the 'Subscriptions options' configuration page. It features an orange header with the text 'General settings' and a sub-header 'Subscriptions options'. Below the sub-header, there are two main settings: a text input field for a 'Secret key to avoid non-authorized usage of Subscriptions module:' and a checkbox for 'Recurring billing notification to orders department:' which is currently checked. At the bottom left of the form area, there is a 'Save' button.

- a) If you are going to run the `admin/pay_subscriptions.php` script from the command line or to automate recurring billing using a scheduling program (like cron), set a secret key for your Subscriptions module. A secret key must consist of alpha-numeric symbols and can have up to 64 symbols.
- b) Specify if you want notifications to be sent to the orders department after billing has been performed.

**Note:** The text of the recurring billing email notification is hard-coded in `admin/pay_subscriptions.php`.

- c) Click on **Save**.

## 8.29.2 Adjusting Setup Fees and Recurring Billing Plans

If you want to sell products using subscription, you need to define a subscription setup fee and a recurring billing plan for each of these products.

### To define a subscription setup fee for a product:

1. Find the product for which you want to set up a recurring billing plan. Open this product for modification in the 'Product Management' section.
2. Enter the desired setup fee into the 'Price' field.



## To set up a recurring billing plan for a product:

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

PAY PERIOD	PERIOD FEE (£)	COST OF ONE DAY (£)	DAYS SAME PERIOD
Annually			

days

Apply Delete

3. Complete the fields of the 'Subscription' dialog box:
  - a) Specify the frequency at which a customer's account should be charged:
    - select *Annually, Quarterly, Monthly* or *Weekly* from the 'PAY PERIOD' drop-down box, or
    - select *By period* from the 'PAY PERIOD' drop-down box and enter your own period into the field below. The period must be specified in days.
  - b) Specify a period fee - an amount that will be charged to a customer's account per period. For example, if a monthly payment must be \$20, you should enter 20.00 into the 'PERIOD FEE' field.
  - c) Use the 'COST OF ONE DAY' field to specify how much it will cost to use the product for one day.
  - d) Use the 'DAYS SAME PERIOD' field to specify the number of days in the period specified in the 'PAY PERIOD' field.

**Note:** Adjusting the 'COST OF ONE DAY' and 'DAYS SAME PERIOD' fields enables your customers to sign up for recurring billing plans at any time, without having to wait till the beginning of the next pay period.

*Example:*

You would like to set up a recurring billing plan for a certain product so that regular payments of \$20 are taken from the accounts of customers who purchase this product monthly (say, on the 10th day of the month). You set the 'PAY PERIOD' field to Monthly and the 'PERIOD FEE' field to 20.00. Assuming the product's setup fee is set to 0.00, a customer who signs up for the recurring billing plan on May 10th will be supposed to pay \$20 at once, then another \$20 on June 10th, then \$20 on July 10th and so on.

Now think of a situation where a customer comes to your store on May 1st and signs up for the recurring billing plan. How much is this customer supposed to pay? It does not seem fair to charge him the full period fee amount of \$20 on May 1st, as he will be supposed to pay \$20 again in just 10 days. Subscriptions module helps you handle this situation using the values of 'COST OF ONE DAY' and 'DAYS SAME PERIOD' fields. As his first payment, the customer who signs up for the recurring billing plan 10 days before the established pay date will only be charged for the time he uses the product in the current period (10 days). To find out how much money the customer is supposed to pay for 10 days, Subscriptions module will multiply the cost of one day of using the product (the value of the 'COST OF ONE DAY' field) by the number of days before the next pay period (the value of the 'DAYS SAME PERIOD' field). In our example, the cost of one day is \$20.00 (period fee) / 30 days (the average number of days in a month) = \$0.666667; the number of days before the next pay period is 10. This means that the cost of using the product for 10 days before

the next period is approximately \$6.67

The sum that will be charged to your customer's account on May 1st will be calculated according to the formula 'setup fee + cost of using the product for 10 days' (\$0.00 + \$6.67) and will equal \$6.67.

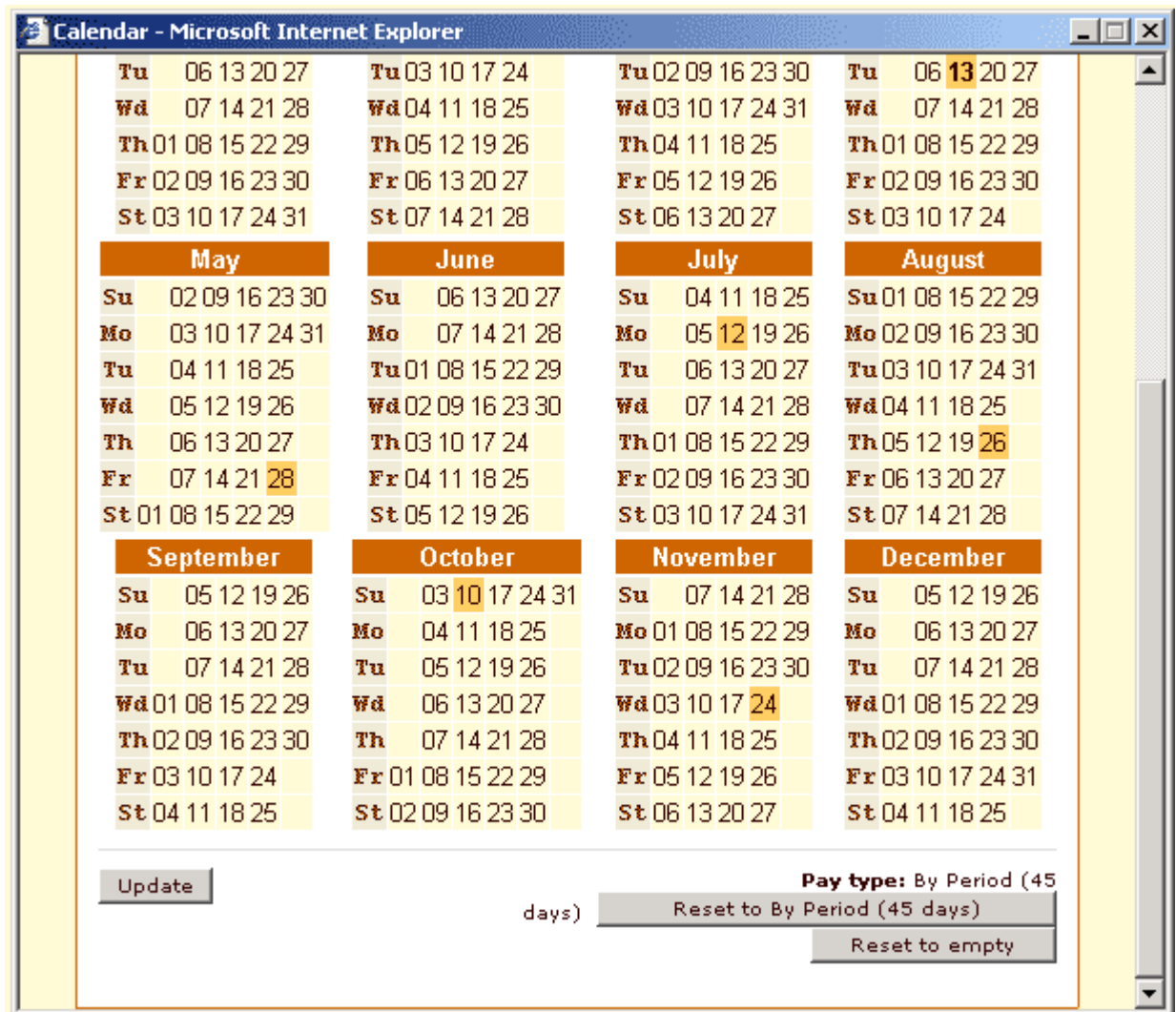
**Subscription**

PAY PERIOD	PERIOD FEE (\$)	COST OF ONE DAY (\$)	DAYS SAME PERIOD
Monthly	20.00	0.666667	30
<input type="text"/>			

days

4. Click on **Apply**. Pay dates button will appear.

5. Click the **Pay dates** button. Use the calendar to select the dates on which payments will be supposed to be taken.



You might want to accept the dates offered by the program or select different dates. All the selected dates can be unselected with one click (use the **Reset to empty** button). To select a pay date, click on the appropriate date in the calendar. The date 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 recurring billing plan:**

1. Find the product whose recurring billing plan you want to delete. Open this product for modification in the 'Product Management' section.
2. Click the **Subscriptions** link in the 'Product Management' section menu. 'Subscription' dialog box

will be opened.

3. Click on the **Delete** button at the bottom of the 'Subscription' dialog box. The dialog box fields should be cleared.

## 8.29.3 Managing Subscriptions

Existing subscriptions can be managed through the 'Subscriptions Management' section of the store's Administration back-end. To access the 'Subscriptions Management' section, click on Subscriptions in the Management menu.

### Finding subscriptions

To find one or more existing subscriptions:

1. Go to the 'Subscriptions Management' section.
2. Use the Search form to provide the details of the subscriptions you would like to be found.



The screenshot shows a search form with an orange header bar labeled "Search form". Below the header, there are three input fields: "Product ID:" with a small text box, "Product title:" with a larger text box, and "Customer login:" with a medium-sized text box. At the bottom of the form, there are two buttons: "Search Go" and "List all Go".

Complete one or more of the following fields:

- a) 'Product ID' - to find a subscription by the ID of the subscription product;
  - b) 'Product title' - to find a subscription by the title of the subscription product.
  - c) 'Customer login' - to find a subscription by the login of the customer signed up for the appropriate recurring billing plan.
3. Click on **Search**.

To list all existing subscriptions:

1. Go to the 'Subscriptions Management' section.
2. Click on **List all** at the bottom of the Search form (without providing any details).

## Subscription search results

No matter whether you search for a specific subscription or tell X-Cart to list all the subscriptions existing in your store, the search results are listed in the form of a table in the 'Subscriptions' form. The table format description provided in the upper part of the 'Subscriptions' form can help you read the table.

**Subscriptions**

**Table Format:**  
 <Product> (<Next Pay Date>): <Subscribers>  
 <Login> <Date of Subscription> (<Subscription Order Status>) <Last Paid Date> (<Last Paid Order Status>)  
**Note:** Order status codes: **Q** - Queued, **P** - Processed, **B** - Backordered, **D** - Declined, **F** - Failed, **C** - Complete.

CUSTOMER	SUBSCRIPTION DATE	LAST PAID DATE	STATUS
<b>Lamp</b> (06/18/2004): subscriber(s)			
dohtur	06/16/2004 (Q)	06/16/2004 (Q)	Active <input style="vertical-align: middle;" type="button" value="▼"/> <a href="#" style="color: red; text-decoration: none; font-weight: bold;">Charge</a>

To view the details of a found subscription product, click on the <Product> link.

To view/modify the payment schedule defined for the product, clicking on the <Next Pay Date> link.

To view/modify the profile details of a user signed up for the recurring billing plan corresponding to the found subscription, click on the user's <Login> link.

To view/modify the details of an order corresponding to the first payment in a recurring billing plan, click on the <Date of Subscription> link (SUBSCRIPTION DATE column).

To view/modify the details of an order corresponding to the most recent payment in a recurring billing plan, click on the <Last Paid Date> link (LAST PAID DATE column).

To change the status of a customer's subscription to a certain product, use the drop-down box located in the STATUS column opposite the customer's login: select the desired status (*Active*, *Unsubscribed* or *Disabled*) and wait for the page to be refreshed.

(If you process payments manually) To charge an appropriate amount to a customer's credit card, click the **Charge** link opposite the customer's login.

## 8.29.4 Running admin/pay\_subscriptions.php

To be able to accept periodic payments from customers, you will need to periodically run the script `<xcart_dir>/admin/pay_subscriptions.php`.

To run the script, do one of the following:

- Request that the accounts of customers supposed to make a periodic payment be charged using the controls of X-Cart Administration back-end:
  - a) Click the Subscriptions link in in the Management menu to access the 'Subscriptions Management' section.
  - b) Search for the customer accounts that need to be charged.
  - c) Click the **Charge** link.
- Launch the script `admin/pay_subscriptions.php` from the command line.

Use one of the following commands:

```
/usr/bin/curl --get http://www.mystore.com/admin/pay_subscriptions.php?key=s
```

or

```
/usr/bin/wget -q -O- http://www.mystore.com/admin/pay_subscriptions.php?key=s
```

or

```
/ustr/bin/fetch -o- http://www.mystore.com/admin/pay_subscriptions.php?key=s
```

where `http://www.mystore.com` is the address of your store and `secret` is your secret key for Subscriptions module.

- Adjust a scheduling program (for example, cron) to periodically run the script `admin/pay_subscriptions.php`. This method seems the most convenient, as the process of charging your customers' accounts becomes fully automated.

No matter which of the three methods is used to launch the script `admin/pay_subscriptions.php`, you do not need to remember the exact payment due date: the script charges only the accounts of customers for whom the time has come to make a payment (according to the subscription plan).

After the appropriate accounts get charged, you should find a proper number of orders placed.

## 8.30 UPS OnLine® Tools

### What UPS OnLine® Tools module does

The module UPS OnLine® Tools enables UPS real-time shipping rate calculation at your store.

## Roles in UPS OnLine® Tools module management

If you are an X-Cart GOLD administrator/provider or an X-Cart PRO administrator:

- You can enable/disable UPS OnLine® Tools module, perform UPS OnLine® Tools registration and configure the module settings (See [Enabling and Configuring 'UPS OnLine® Tools'](#)).

### 8.30.1 Enabling and Configuring 'UPS Online® Tools'

To begin using the module:

1. Make sure your store meets the system requirements for installing and using UPS OnLine® Tools module. The following components are required:
  - EXPAT extension for php;
  - HTTPS module like Net:SLeay, libCURL, CURL, Open SSL or HTTPS-cli.

**Note:** You can use the Summary page (Administration menu->Summary) to find out whether these components are installed on your system. If you select Net:SLeay perl module as your preferred HTTPS module, be sure to specify the full path to Perl interpreter executable in General settings->General options.

2. Enable UPS OnLine® Tools module (Administration menu->Modules).  
When the module is enabled, a link 'UPS OnLine® Tools' appears in the Management menu of the administration back-end of your store.
3. Register your UPS OnLine® Tools with UPS:
  - a) Go to the 'UPS OnLine® Tools' section of your store (Management menu->UPS OnLine® Tools). You should see a dialog box titled 'UPS Online® Tools - Main page'.

**UPS OnLine® Tools - Main page**



**UPS OnLine® Tools**

You have not registered your UPS Online Tools.

To start the licensing and registration process for UPS OnLine® Tools click on the 'Register' button


[Register](#)

---

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- b) Click the **Register** button. UPS Online® Tools Licensing & Registration Wizard will be launched to guide you through the registration process.

**UPS OnLine® Tools Licensing & Registration Wizard - Step 1**



**UPS OnLine® Tools Licensing & Registration Wizard**

This wizard will assist you in completing the necessary licensing and registration requirements to activate and use the UPS OnLine Tools from this application.

If you do not wish to use any of the functions that utilize the UPS OnLine Tools, click the Cancel button and those functions will not be enabled. If, at a later time, you wish to use the UPS OnLine Tools, return to this section and complete the UPS OnLine Tools licensing and registration process.

[Next](#)      [Cancel](#)

---

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- c) Complete the registration:

At Step 1, click the button **Next** to proceed with the registration.

At Step 2, read the UPS Technology Agreement.



**UPS OnLine® Tools Licensing & Registration Wizard - Step 2**



UPS TECHNOLOGY AGREEMENT Version UT&1072006 PLEASE CAREFULLY READ THE FOLLOWING TERMS AND CONDITIONS OF THIS UPS TECHNOLOGY AGREEMENT. BY INDICATING BELOW THAT YOU AGREE TO BE BOUND BY THE TERMS AND CONDITIONS OF THIS AGREEMENT, YOU HAVE ENTERED INTO A LEGALLY BINDING AGREEMENT WITH UNITED PARCEL SERVICE GENERAL SERVICES CO. ("UPS").

This Agreement comprises (1) these General Terms and Conditions (including attached Exhibit A (Definitions)); (2) the End User Rights (including attached Exhibit A (Definitions), Exhibit B (UPS Technology), and Exhibit C (Permitted Territory)) available here

such registration, (2) and that has been assigned the UPS account you first use with the first UPS Technology you


Yes, I Do Agree  
 No, I Do Not Agree

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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 to accept the terms and conditions of the Agreement, select 'No, I Do Not Agree' and click on **Next** (In this case you will exit the registration process).

At Step 3, 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).

**UPS OnLine® Tools Licensing & Registration Wizard - Step 3**



Contact Name:

Title:

Company name:

Street Address:

City:

State:

Country:

Zip/Postal code:

---

Number:

To open a UPS Account [click here](#) or call 1-800-PICK-UPS.

I would like a UPS Sales Representative to contact me about opening a UPS Shipping Account:

Yes  No

To fill in the form by data from your personal profile click on the 'Fill From Profile' button.

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:

**UPS OnLine® Tools Licensing & Registration Wizard - Registration Successful**



**Registration Successful!**

Thank you for registering to use the UPS OnLine® Tools.

To learn more about the UPS OnLine® Tools, please visit [www.ec.ups.com](http://www.ec.ups.com)

Still handwriting your UPS shipping labels? **UPS Internet Shipping** allows you to electronically prepare domestic and international shipments from the convenience of any computer with Internet access. To learn more or to begin using UPS Internet Shipping, [click here](#).

To go to the main UPS OnLine Tools page click on the 'Finish' button

**Finish**

---


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Click on **Finish** to return to 'UPS Online® Tools - Main page'.

4. Adjust your store to use UPS Online® Tools:

- a) Ensure that the option 'Real-time shipping calculation' is enabled and the option 'Intershipper calculation services' is disabled in General settings->Shipping options section.
- b) Again, go to the 'UPS OnLine® Tools' section of your store. After you have registered your UPS Online® Tools with UPS, a **Configure** button appears in the 'UPS Online® Tools - Main page' dialog box:

**UPS OnLine® Tools - Main page**



**UPS OnLine® Tools**

You have already registered with UPS.

To go through the licensing and registration process for UPS OnLine® Tools again, click on the 'Register' button

To configure UPS Rates & Service Selection and Address Validation Tools click on the 'Configure' button


**Configure**      **Register**

---

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Click this button. A dialog box titled 'UPS Online® Tools Rates & Service Selection' opens.

UPS OnLine® Tools Rates & Service Selection



### Rates & Service Selection OnLine Tool

The fields marked with \* are mandatory.

**UPS account number:**

**Your merchant account type:\*** Daily Pickup  
Occasional  
Suggested Retail Rates

Click here for help

**Destination type:\***  Residential address  Commercial address

**Packaging type:** Unknown

**Package dimensions\***

Enter package dimensions and select an oversize category for your

To go to the UPS OnLine® Tools main page click on the 'Main page' button.

Main page
Test

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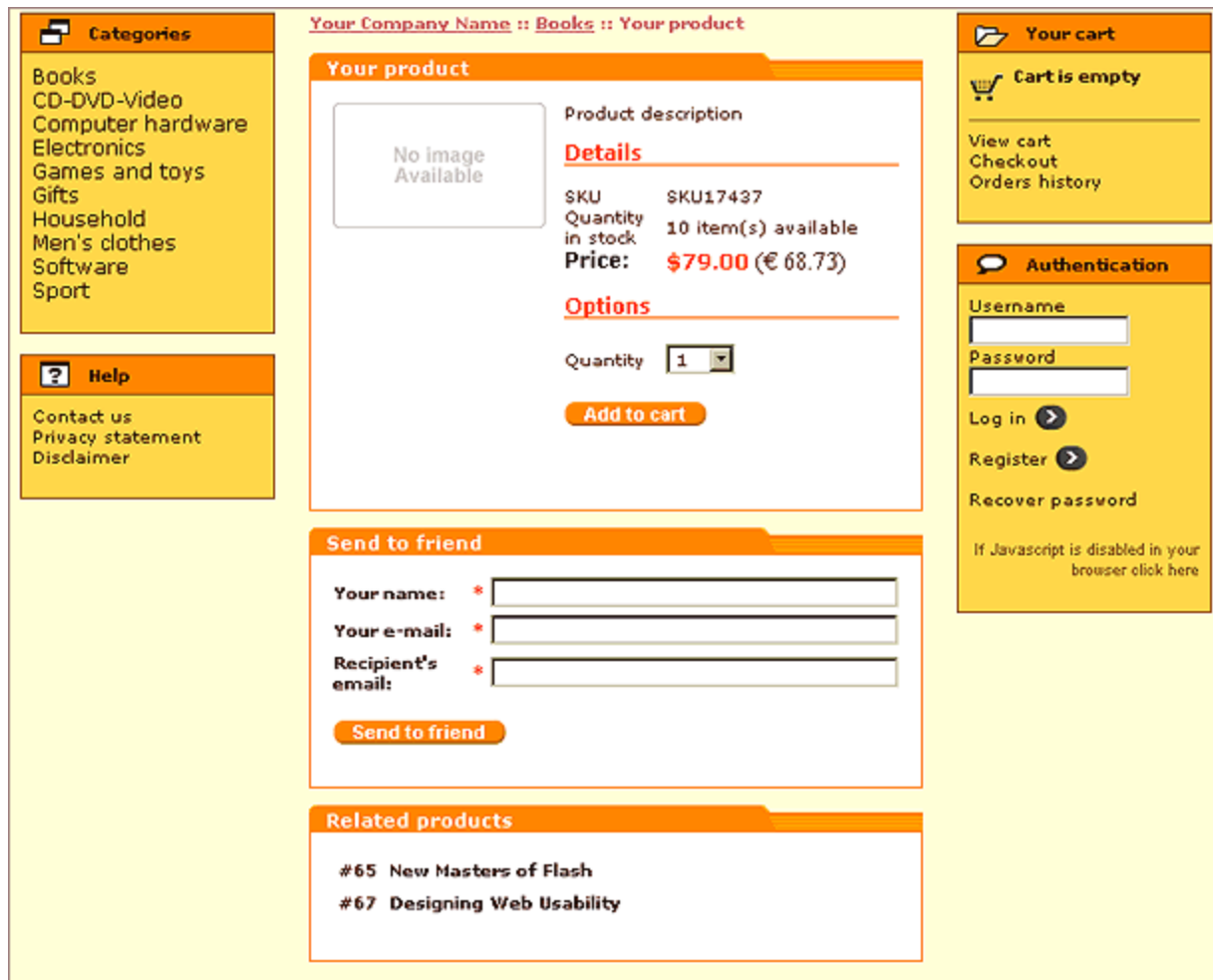
- c) Complete the fields in the 'Rates & Service Selection OnLine Tool' and 'Address Validation OnLine Tool' subsections of the 'UPS Online® Tools Rates & Service Selection' dialog box.
- d) Click the **Update** button.

**Note:** The button Test can be used to test the Rates & Service Selection and Address Validation Tools.

## 8.31 Upselling Products

### What Upselling products module does

The module Upselling products enables upselling/cross selling at your store. It allows you to create links between products, so that, when a store visitor views the details page of a certain product, he or she is offered other items as alternatives or in addition to the item on view. Links to the items related to the item on view are displayed in a section titled 'Related products':



The links by which upselling/cross selling relationships between products are established are termed *upselling links*. Depending on your wish, an upselling link can lead in a single direction (from product A to product B), or be bidirectional (pointing both ways, from product A to product B *and* from product B to product A).

## Roles in Upselling products module management

If you are an X-Cart GOLD administrator/provider or an X-Cart PRO administrator:

- You can enable/disable Upselling products module and adjust its configuration settings (Check out [Enabling and Configuring 'Upselling products'](#)).
- You can add upselling links to any products in your store (See [Adding Upselling Links](#)).
- You can manage upselling links (Study [Managing Upselling Links](#))

If you are an X-Cart PRO provider:

- You can add upselling links to your products (See [Adding Upselling Links](#)).

- You can manage your own upselling links (Study [Managing Upselling Links](#)).

## 8.31.1 Enabling and Configuring 'Upselling Products'

To begin using the module:

1. Enable Upselling products module (Administration menu->Modules).

When the module is enabled, you can see: Upselling products options section in General settings/ Modules options.

2. Adjust the module settings via General settings/Modules options->Upselling products options:



The screenshot shows a dialog box titled "General settings" with a sub-section "Upselling products options". Inside this section, there is a text label: "Open Product details page in a new window when a customer clicks on a product link in 'Related products' list.:". To the right of this text is an unchecked checkbox. Below the checkbox is a "Save" button.

- a) The option 'Open Product details page in a new window when a customer clicks on a product link in "Related products" list' defines where the Product details page will be opened if a customer clicks on an upselling link.

If you wish the Product details page to be opened in a new browser window, select the check box; however, if you wish the Product details page to be opened in the same browser window, leave the check box unselected.

- b) Click the **Save** button to save the changes.

## 8.31.2 Adding Upselling Links

To create an upselling link:

1. Find the product for which you wish to create an upselling link. Open this product for modification in the 'Product Management' section.
2. Click on the Upselling links link in the 'Product Management' section menu. The 'Upselling links' dialog box opens.

**Upselling links**

POS.	PRODUCT ID	SKU	PRODUCT
No products			

**Add new link**

Product:

Bidirectional link

3. Use the 'Add new link' section to specify the link that needs to be added:

- a) Select the product to which the upselling link should point. Instructions for [selecting a product for an upselling link](#) are provided below.

**Upselling links**

POS.	PRODUCT ID	SKU	PRODUCT
No products			

**Add new link**

Product:

Bidirectional link

- b) If you wish the link being created to be bidirectional, select the check box 'Bidirectional link'.

**Note:** A bidirectional upselling link is a link that establishes such a relationship between two products that the 'Related products' section of each of them provides a link to the other product.

4. Click the **Add/Update** button. The link is added to the list of upselling links of the current product.

	POS.	PRODUCT ID	SKU	PRODUCT
<input type="checkbox"/>	1	#65	SKU65	New Masters of Flash

**Add new link**

Product:

Bidirectional link

An Information box with a confirmation message is displayed.

### Selecting a product for an upselling link

To select a product for the 'Product' field in the 'Add new link' section of the 'Upselling links' dialog box, follow these steps:

1. Click the **Browse** button next to the 'Product' field. A new window opens displaying a dialog box titled 'Choose a product':

**Choose a product**

**Bookmarks:**

---

**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
- Computer hardware/CD & DVD
- Computer hardware/CPU Coolers
- Computer hardware/Cases
- Computer hardware/Keyboards
- Computer hardware/Memory chips
- Computer hardware/Monitors
- Computer hardware/Motherboards
- Computer hardware/Mouses
- Computer hardware/Personal assistants (PDA)
- Computer hardware/Portable computers
- Computer hardware/Printers
- Computer hardware/Processors

There are no available products under this category.

On the left-hand side of the dialog box, you should see a selectbox labeled 'Categories'. This selectbox



provides a list of all the categories in your store.

2. In the 'Categories' selectbox, find the name of the category that contains the product to which you wish to create an upselling link.
3. Tell X-Cart to list all the products contained in this category. Do one of the following:
  - Double-click on the name of the category.
  - Click on the name of the category (once, so the name is highlighted) and then click the button **Show products** at the bottom of the dialog box.

The contents of the selected category gets displayed on the right-hand side of the dialog box - in a selectbox labeled 'Products':



(If the 'Products' selectbox does not appear and you just see a message *There are no available products under this category*, it means that the category that has been selected does not contain any products and you should choose a different category).

4. In the 'Products' selectbox, find the product to which you wish to create an upselling link.
5. Select this product. Do one of the following:
  - Double-click on the product name.
  - Click on the product name (once, so the name is highlighted) and then click the **Select** button at the bottom of the dialog box.

The product name appears in the 'Product' field in the 'Add new link' section.

While using the 'Choose a product' dialog box, you can use bookmarks. Bookmarks allow you to pre-select products (add products to a list of bookmarked items from which they can be quickly selected at a later time).

To bookmark a product:

1. Click on the product name (once, so the name is highlighted).
2. Click the **Bookmark** button at the bottom. The product is added to the 'Bookmarks' list at the top of the 'Choose a product' dialog box.

To select a bookmarked product:

1. Find the product in the 'Bookmarks' list at the top of the 'Choose a product' dialog box.
2. Click on the product name. The product name appears in the 'Product' field in the 'Add new link' section.

## 8.31.3 Managing Upselling Links

### Changing the order of upselling links for a certain product

You can change the order in which the upselling links of a certain product appear in the 'Related products' section.

To change the order of upselling links:

1. In the POS. column of the 'Upselling links' dialog box, change the position numbers of the links whose positions need to be changed.
2. Click the **Add/Update** button. The order of links in the 'Related products' section changes. An Information box with a confirmation message is displayed.

### Editing upselling link details

Editing the details of an upselling link (changing the product to which the link points, readjusting the 'bidirectional' feature) is not possible. If you need to change the details of any of your existing links, delete it and create it again.

### Deleting upselling links

---

If you no longer need a previously created upselling link, you can delete it.

To delete an upselling link:

1. In the 'Upselling links' dialog box, select the check box next to the link that needs to be deleted.
2. Click the **Delete selected** button. The link is removed from the list of upselling links of the current product. An Information box with a confirmation message is displayed.

It is possible to delete multiple upselling links of one product at a time. To do so, select all the links that need to be deleted by selecting their check boxes and click the **Delete selected** button.

## 8.32 Users Online

### What Users Online module does

The module Users online enables 'Users online statistics' subsection in the 'Statistics' section of your store's administration back-end (Management menu->Statistics).

'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.

Users online				
CUSTOMER	DATE		CURRENT PAGE	CART CONTENT
	FIRST ENTRY	LAST ENTRY		
<a href="#">John John</a>	21/07/2004 11:03:30	21/07/2004 11:03:30	<a href="http://example.com/eshop/cart.php">http://example.com/eshop/cart.php</a>	<b>Javascript (Definitive Guide):</b> 1 x £39.50 = £39.50 Cover: Soft
<a href="#">John John</a>	21/07/2004 11:31:40	21/07/2004 11:32:51	<a href="http://example.com/eshop/cart.php?mode=wishlist">http://example.com/eshop/cart.php?mode=wishlist</a>	<b>Javascript (Definitive Guide):</b> 1 x £39.50 = £39.50 Cover: Soft  <b>Designing Web Usability:</b> 1 x £27.50 = £27.50 Cover: Soft

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.

## 8.33 Wholesale Trading

### What Wholesale Trading module does

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.

### Roles in Wholesale Trading module management

If you are an X-Cart GOLD administrator/provider or an X-Cart PRO administrator:

- You can enable/disable Wholesale Trading module.
- You can define wholesale prices for products (Study [Setting Wholesale Prices](#)).

If you are an X-Cart PRO provider:

- You can define wholesale prices for products (Study [Setting Wholesale Prices](#)).

## 8.33.1 Setting Wholesale Prices

You can define wholesales pricing for the product. The product will be sold for the wholesale price if a customer from a specified membership group buys a quantity of product items that is greater or equal to the quantity specified in the 'Quantity' field. If the product has product variants, any wholesale prices defined here will be ignored.

To set a wholesale price:

1. Find the product for which you want to set a wholesale price. 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.

**Wholesale prices**

**Note:** When defining wholesale prices, please be aware that the list of prices that is displayed to a customer in the Customer area is sorted and filtered in a special way so that a customer can see only the prices actually available to him. [more...](#)

QUANTITY	PRICE (\$)	MEMBERSHIP
1	1790.00	All

**Add new price**

---

▼

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 membership group 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.

For example, the line '10 - 49.99 - Wholesale' in the screenshot below sets a wholesale price on the product in such a way that a member of the *Wholesale* membership level will be able to order the product at \$49.99 per item if the order contains 10 or more items of the product:

**Wholesale prices**

**Note:** When defining wholesale prices, please be aware that the list of prices that is displayed to a customer in the Customer area is sorted and filtered in a special way so that a customer can see only the prices actually available to him. [more...](#)

	QUANTITY	PRICE (\$)	MEMBERSHIP
	1	1790.00	All

**Add new price**

---

**Note:** Instead of adding wholesale prices one by one, you can import them from a CSV file.

To change a previously defined wholesale price, edit the corresponding price value and/or membership and click the **Add/Update** button.

When defining wholesale prices, please be aware that the list of prices that is displayed to a customer in the Customer area is sorted and filtered in a special way so that a customer can see only the prices actually available to him:

- Individual prices are arranged in the order of increasing the quantity of items for which the price is defined and decreasing the price amount (For example, 10+ items - \$5 per item, 20+ items - \$4 per item, 30+ items - \$3 per item).
- The prices are filtered by customer membership: customers without a membership see only the prices available to "All"; customers with a specific membership see both the prices available to "All" and to their membership.
- The final filtering that defines which prices need to be displayed to a specific customer is performed according to the principle of the lowest price: at each level of wholesale pricing, customers are shown only the lowest price available to them.

For example, if in the store's administration back-end the prices are defined like this:

Base price - \$6 per item - Membership: *All*,  
 10+ items - \$5 per item - Membership: *All*,  
 20+ items - \$3 per item - Membership: *Premium*,  
 30+ items - \$4 per item - Membership: *All*,  
 40+ items - \$2.5 per item - Membership: *Premium*,  
 100+ items - \$2 per item - Membership: *Wholesale*

in the Customer area, a customer with *Premium* membership will be shown just the following prices:

- Base price - \$6 per item - Membership: *All*,
- 10+ items - \$5 per item - Membership: *All*,
- 20+ items - \$3 per item - Membership: *Premium*,
- 40+ items - \$2.5 per item - Membership: *Premium*

The price "100+ items - \$2 per item - Membership: *Wholesale*" will be excluded from the list as unavailable to the *Premium* membership.

The price "30+ items - \$4 per item - Membership: *All*" will be excluded as fully replaceable by the price "20 + items - \$3 per item - Membership: *Premium*" being the lowest price available to *Premium* members buying any number of items from the quantity range of 20-40 items.

To delete a price, select the check boxes next to the necessary prices and click **Delete selected**.

### 8.33.2 Setting Wholesale Prices for Product Variants

Perform the following steps to modify wholesale prices for selected product variants:

1. Select the check boxes next to the necessary variants.
2. Click on the [\[+\] Modify wholesale prices for selected variants](#) link.
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 membership group that you want to be able to purchase the product at this price.

For example, the line '10 - 13.99 - *Premium*' in the screenshot below sets a wholesale price on the product in such a way that a member of the *Premium* membership level will be able to order the product at \$13.99 per item if the order contains 10 or more items of the product:

**Modify wholesale prices for selected variants**

Please remember, that the prices will be updated only for selected variants. Use 'Update' button to apply the modifications.

**Note:** When defining wholesale prices, please be aware that the list of prices that is displayed to a customer in the Customer area is sorted and filtered in a special way so that a customer can see only the prices actually available to him. [more...](#)

QUANTITY	PRICE	MEMBERSHIP	
<input type="text" value="10"/>	<input type="text" value="13.99"/>	<input type="text" value="Premium"/>	<input type="checkbox"/> +
<input type="text" value="100"/>	<input type="text" value="11.99"/>	<input type="text" value="Wholesale"/>	<input type="checkbox"/> + <input type="checkbox"/> -

Click on the plus sign on the right to add another wholesale price using other item quantity or membership level, for the same selected product variants.

6. Click on **Update wholesale prices**. The new wholesale price will be added to the prices list.

## 8.34 Wishlist

### What Wishlist module does

'Wishlist' is a module that allows the users of your store to keep *wish lists*. A wish list is a place where a customer can add and store product titles and detailed info of the products that he or she intends to buy in the future.

**Note:** Wish list functionality is available only to registered customers.

Adding a product to the wish list does not mean ordering it. The idea is that, by entering a product into a wish list, customers make a reminder for themselves to buy it at a later time or give their friends an idea for a gift.

A registered customer can add a product to the wish list directly from the page on which the product is displayed (a Products list page or a Product details page). To add a product to the wish list, the customer only needs to click the **Add to wish list** button below the desired product.



The screenshot displays an e-commerce interface with a yellow theme. At the top, there is a search bar with a 'Go' button and a link to 'Advanced search'. A language selector is set to 'English'. Below the search bar, the page is divided into several sections:

- Categories:** Lists various product categories such as Books, CD - DVD - Video, Computer hardware, Electronics, Games and toys, Household, Men's clothes, Software, and Sport.
- Bestsellers:** Shows a list of top-selling items, with the first being '1. PATRICK Maracana HG Cleats'.
- Manufacturers:** Lists 'ExampleBooks' and 'ExampleHousehold'.
- Special:** Offers 'Gift certificates' and 'Feature-based search'.
- Help:** Provides links for 'Contact us', 'Privacy statement', and 'Terms & Conditions'.

The main content area is titled 'Sport' and features two product listings:


- PATRICK Maracana HG Cleats (SKU: C98715):** Described as 'Soft full grain leather for superb comfort and fit stitched padded vamp piece, reinforced heel counter, molded rubber hardground sole for optimum traction, EVA wedge for excellent shock absorption. Stitched heel and toe bumper for increased stability and durability.' The market price is \$47.67, and the current price is \$41.95 (€36). A callout box points to the 'Add to wish list' button, stating: 'By clicking this button, a customer can add the product 'PATRICK Maracana HG Cleats' to Wish list.'
- Brine ATTACK Soccer Ball (SKU: SOCBALL01):** Described as 'High Gloss Cover. Multi-layer Fabric Back. Butyl Bladder'. The market price is \$15.06, and the current price is \$12.95 (€11.27), representing a 14% discount.

On the right side, there is a 'Your cart' section showing 'Cart is empty' and options to 'View cart', 'Checkout', 'Wish list', 'Modify profile', 'Delete history', 'Orders history', and 'Returns'. Below that is an 'Authentication' section indicating 'customer is logged in' and a 'Log out' button. At the bottom right, there is an 'Affiliates' section with a link to 'Click here to register as an affiliate'.

Wish lists associated with specific user profiles are saved in the database the same way as registered customers' cart info is saved and stored, so after logging into the store next time a wish list owner finds his or her wish list intact and can quickly order the products contained there.

Keeping info about the desired products in one list saves a customer's time and effort. When a customer decides to buy a product found at the store on a previous visit (provided the product was saved to the customer's wish list), he or she does not have to go through all the categories again or bother to formulate keywords for the search engine: all the customer needs to do is click the link Wish list in Your cart menu, find the necessary product in the Wish list and add it to the shopping cart.

**Wish list**



**Lord of the Rings Board Game**  
 Here's your chance to prove you are worthy to save Middle Earth Enter the world envisioned in J.R.R. Tolkien's book Lord of the Rings and become a...


**Selected options:**  
 Gift pack: No

**Edit options** Go

**\$34.99** x  = **\$34.99**    **Update** Go

**Details** Go    **Add to cart** Go    **Delete item** Go

---



**PATRICK Maracana HG Cleats**  
 Soft full grain leather for superb comfort and fit stitched padded vamp piece, reinforced heel counter, molded rubber hardground sole for optimum t...

**Details** Go    **Add to cart** Go    **Delete item** Go

---

**Send entire wish list by e-mail:**  Go

**Clear wish list** Go

It is possible to view the detailed description of any product in the wish list, edit the options with which the product is selected, update the number of product items desired and add the product to the shopping cart directly from the wish list.

If necessary, the entire wish list can be sent by email to any address provided by the wish list owner.

## Roles in Wish list module management

If you are an X-Cart GOLD administrator/provider or an X-Cart PRO administrator:

- You can enable/disable Wishlist module and adjust its configuration settings (Check out [Enabling and Configuring 'Wishlist'](#))
- You can find and view any wish list created by a customer in your store (Study [Viewing\\_Your](#)

[Customers' Wish lists](#)).

If you are an X-Cart PRO provider:

- You can find and view wish lists containing your products (See [Viewing Your Customers' Wish lists](#)). Please note that you cannot view what products of the other providers are contained in wish lists.

## 8.34.1 Enabling and Configuring 'Wishlist'

To begin using the module:

1. Enable Wishlist module (Administration menu->Modules).

When the module is enabled, you can see:

- a) Wishlists item in the Management menu;
- b) Wishlist options section in General settings/Modules options.

2. Adjust the module settings via General settings/Modules options->Wishlist options:

**General settings**

**Wishlist options**

Show the 'Add to wishlist' button to users who are not registered or not logged in (After clicking this button, such a user will be prompted to log in or to get registered before he will be allowed to access the wishlist):

Save

If you want the **Add to wish list** button to be shown not only to registered customers, but also to users who are not registered or not logged in, select the appropriate check box. Click on **Save**.

When this check box is selected, **Add to wish list** buttons are displayed on the storefront at all times, so any store visitor can see them. However, if an anonymous user clicks such a button, he or she will be prompted to log in or to get registered before he or she are allowed to access the wish list.

## 8.34.2 Viewing Your Customers' Wish Lists

When Wishlist module is enabled, you can search for wish lists created by your customers. Existing wish lists can be found through the 'Search for wish lists' section of the store's Admin or Provider back-end.

To access the 'Search for wish lists' section:

- (If you are an X-Cart GOLD administrator/provider or an X-Cart PRO administrator) Click on Wish lists in the Management menu.
- (If you are an X-Cart PRO provider) Click on Wish lists in the Products menu.

### Finding wish lists

To find one or more wish lists:

1. Go to the 'Search for wish lists' section.
2. Use the 'Search for wish lists' form to provide the details of the wish lists you would like to be found.



The screenshot shows a web form titled "Search for wish lists" with an orange header. The form contains four input fields: "Customer:", "SKU:", "Product ID:", and "Product:". Each field is followed by a text input box. At the bottom of the form is a "Search" button.

Complete the fields:

- a) 'Customer' to specify the login name of a wish list owner.
  - b) 'SKU' to specify the SKU of a product contained in a wish list.
  - c) 'Product ID' - to specify the ID of a product contained in a wish list.
  - d) 'Product' - to specify the title of a product contained in a wish list.
3. Click the **Search** button at the bottom of the 'Search for wish lists' form.

To list all existing wish lists:

1. Go to the 'Search for wish lists' section.

2. Click the **Search** button at the bottom of the 'Search for wish lists' form (without providing any details).

### Wish list search results

No matter whether you search for a specific wish list or tell X-Cart to list all the wish lists existing in your store, the search results are output in the form of a two-column table.

The screenshot shows a table titled "Search results" with two columns: "CUSTOMER" and "ITEMS". The "CUSTOMER" column contains the text "John Doe (customer)". The "ITEMS" column contains the text "2 item(s) in wish list". There is a "Search again" button with a "Go" icon in the top right corner.

CUSTOMER	ITEMS
John Doe (customer)	<a href="#">2 item(s) in wish list</a>

The first column (CUSTOMER) provides full and login names of wish list owners. Each name is a link that enables you to view the customer's profile details.

The second column (ITEMS) allows you to see the number of product titles in each wish list.

To view the contents of a wish list, click on the link corresponding to this wish list in the ITEMS column. The wish list will be opened in the 'Wish list' form:

The screenshot shows a table titled "Wish list" for customer "John Doe (customer)". It lists two items with their SKUs, product names, selected options, and amounts. There is a "Search again" button with a "Go" icon in the top right corner.

SKU	PRODUCT	SELECTED OPTIONS	AMOUNT
<a href="#">SKU93</a>	<a href="#">Lord of the Rings Board Game</a>	Gift pack: No	2
<a href="#">C98715</a>	<a href="#">PATRICK Maracana HG Cleats</a>	Size: XS Color: Brown	1



# 9 Most Popular Payment Methods Supported by X-Cart

This section provides information on some of the most popular payment methods used with X-Cart:

- [PayPal](#)
- [Authorize.Net](#)

## 9.1 PayPal

PayPal is one of the most popular online payment options worldwide, and it is also the most popular payment method among X-Cart's customers.

X-Cart software is pre-integrated with PayPal, so any X-Cart store can be easily set up to accept payments through PayPal. X-Cart supports both Standard and Pro PayPal solutions. More information on the PayPal solutions supported by X-Cart is available in the section '[X-Cart's PayPal Integration Overview](#)'.

Instructions for upgrading your X-Cart store in order to use the 4.1.7 PayPal integration are available in the section '[Upgrading X-Cart v.4.1.6 and Below to Use the 4.1.7 PayPal Integration](#)'.

Instructions on how to begin using PayPal as a payment method in an X-Cart store are available in the section '[Putting PayPal to Work with X-Cart](#)'.

The basics of PayPal integration testing are provided in the section '[Testing X-Cart's PayPal Integration](#)'.

Information about using the Order details page of orders paid through PayPal is available in the section '[Working with Orders Paid through PayPal](#)'.

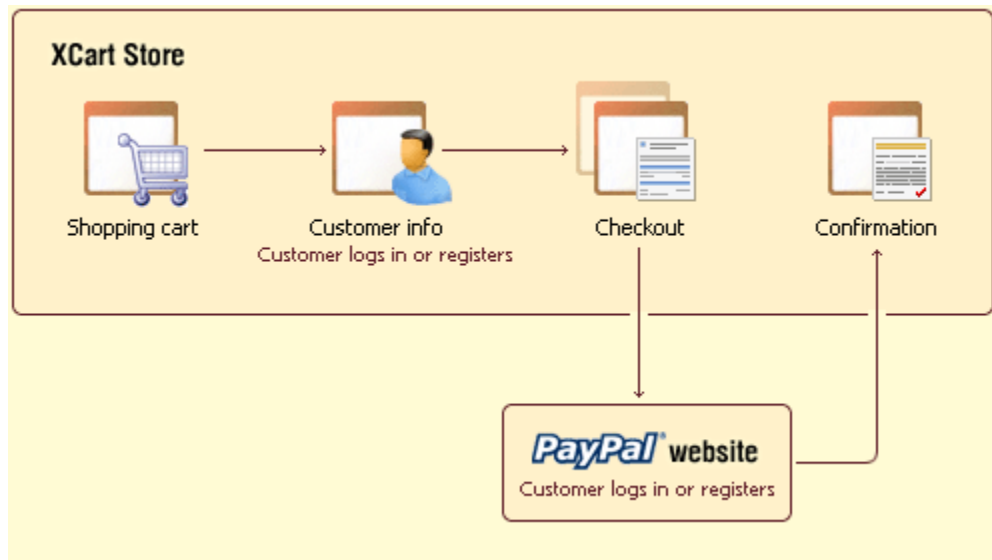
### 9.1.1 X-Cart's PayPal Integration Overview

X-Cart supports the following PayPal solutions:

- Website Payments Standard
- Website Payments Pro
- Express Checkout as an additional payment option
- Website Payments Pro Payflow Edition

#### Website Payments Standard

Website Payments Standard is a simple PayPal solution available to merchants worldwide. It provides a payment method that allows your customers to shop on your website and to checkout on PayPal. In a store using Website Payments Standard, customers going to checkout see PayPal as one of the payment methods available for the order. A customer who submits an order selecting PayPal as a payment method is redirected to PayPal website. There he or she can log in to an existing PayPal account and pay using that account, or choose to pay without logging in - simply by providing the details of a credit card or a bank account. Returning to your store website from PayPal, the customer sees a confirmation page. The process of checking out through Website Payments Standard is presented in the scheme below:



## Website Payments Pro

Website Payments Pro is a PayPal solution currently available only to US merchants. It is an advanced solution composed of two payment capabilities: credit card processing with Direct Payment and PayPal payment processing with Express Checkout.

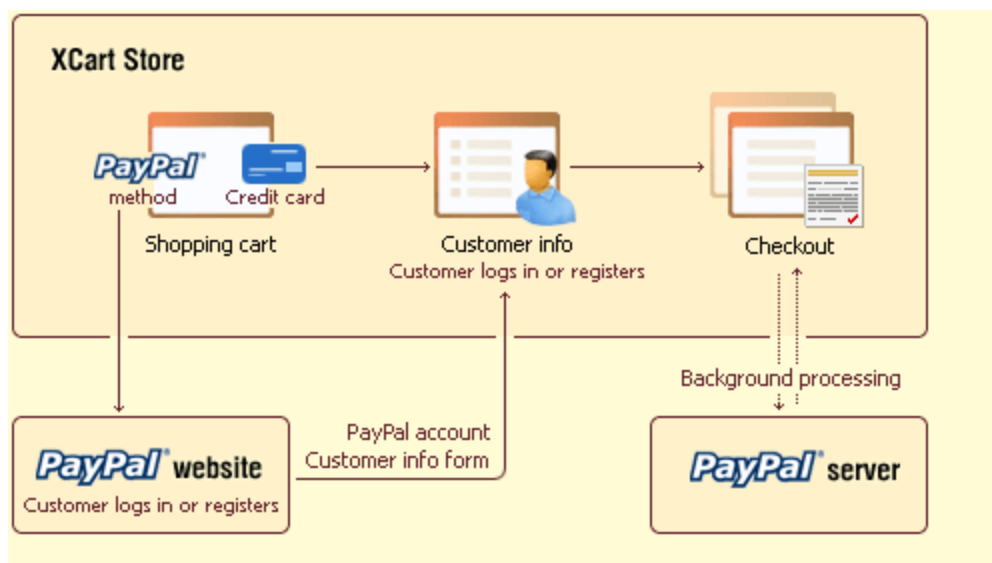
Direct Payment is a method that allows your customers to pay you with a credit card without leaving your store website. A customer enters his or her credit card information on your site, and the payment is processed in the background with PayPal's Direct Payment API. Data exchange between X-Cart and PayPal server happens transparently to the user. The customer stays on your website throughout the entire process of checkout.

Express Checkout is a fast and convenient method offering a "wallet" capability: your customer uses the billing information stored in his or her PayPal account and does not have to enter payment details or shipping information on your site. Because all the information required for order placement is taken from the customer's PayPal account, the customer may freely skip the step of logging in/getting registered at



the store and complete the checkout process anonymously. When using Express Checkout, the customer is redirected to PayPal website. There, the customer logs in or signs up for a new account, selects a funding source and confirms contact and shipping information. Customer information is then passed from the customer's PayPal account to the store and is used to complete the checkout process.

The scheme below demonstrates how checkout happens with Direct Payment and Express Checkout methods:



In an X-Cart store using Website Payments Pro solution, Direct Payment and Express Checkout are provided to customers as two alternative PayPal payment options. The customers themselves choose, which of the two options they wish to use.

X-Cart's implementation of Website Payments Pro is officially PayPal Certified since X-Cart version 4.1.7.

## Express Checkout

Merchants who do not wish to process credit cards through PayPal, but would still like to make PayPal available to their customers as a payment option, have the ability to use Express Checkout separately (without Direct Payment). We refer to this option as 'Express Checkout as an additional payment option', or, simply, 'Express Checkout standalone'. To be able to use Express Checkout as an additional payment option, you should sign up for PayPal's Website Payments Pro solution without submitting the Website Payments Pro application; in X-Cart, you should select the option '[Express Checkout](#)' on the PayPal configuration page.

Unlike Website Payments Pro, Express Checkout standalone is not limited to the US.

## Website Payments Pro Payflow Edition

In addition to Website Payments Pro, X-Cart provides support for another PayPal's solution - Website Payments Pro Payflow Edition. If you are from the US or UK and are interested in using this solution, you should discuss the possibility with a US or UK sales representative or account manager from PayPal.

## 9.1.2 Upgrading X-Cart v.4.1.6 and Below to Use the 4.1.7 PayPal Integration

If you are using X-Cart 4.1.6 or earlier and wish to use X-Cart's PayPal integration as provided by X-Cart 4.1.7, you need to upgrade your X-Cart software.

The complexity of the process of upgrading will vary depending on the version of X-Cart you are using and on the number and complexity of customizations (modifications) implemented in the store.

Below are instructions for upgrading X-Cart to the version 4.1.7. Please choose a method that best suits the type of your X-Cart installation.

### **Non-customized or slightly customized stores, X-Cart 4.1.x branch:**

If the version of your X-Cart lies in the range 4.1.0-4.1.6, all you need to do is apply an upgrade pack that will convert the version you are currently using to 4.1.7. The necessary upgrade pack can be created using the Help Desk.

To create an upgrade pack for upgrading from 4.1.0-4.1.6 to 4.1.7:

1. Log in to the Help Desk.
2. Go to the section 'My Licenses'.
3. In the list of your licenses, find the license of the shop that you wish to upgrade and click on the link 'Upgrade' opposite this license.

You are redirected to a section titled 'Get upgrade pack for [license\_number] X-Cart ([license\_URL])'. In this section, a drop-down box labeled 'Licenses' displays the license you have just selected. The 'Modules' list below the 'Licenses' drop-down box shows a list of add-on modules and skin sets available on the selected license.

3. Make sure the license shown in the 'Licenses' drop-down box is the one that needs to be upgraded (if not, use the drop-down box to select a different license).
4. In the 'Modules' list, select the add-ons and skin sets that need to be upgraded with the shop (Select the appropriate check boxes).
5. From the 'Upgrade pack' drop-down box, select the upgrade pack that is intended for upgrading your store version to 4.1.7.

6. Click the 'Get upgrade pack' button.

The system generates the upgrade pack and offers to save it to your computer in the form of a TGZ file. The extension .tgz means that it is an archive: a bundle of files packaged with tar and subsequently compressed with gzip.

7. Save the file to your local computer.

Now you can apply the upgrade pack to your X-Cart installation. Before applying the upgrade pack, *be sure to back up your store*.

To apply an upgrade pack to your X-Cart installation:

1. Upload the upgrade pack TGZ file to the store server and unpack it to the directory in which X-Cart is installed.
2. In the administration back-end of your store (Admin area), go to the section 'Patch/Upgrade center' (Administration menu->Patch/Upgrade).
3. In the 'Upgrade' dialog box, use the 'Target version' selector to select the version 4.1.7.
4. Click the **Apply** button at the bottom of the 'Upgrade' dialog box.
5. Follow the instructions on the screen to complete the upgrade.

The upgrade script will automatically patch all the files it can patch; the files that have not been patched by the script automatically will need to be patched manually. To be able to apply patches manually, one needs experience in PHP, HTML and MySQL. If you need assistance with applying patches, please feel free to contact X-Cart technical support.

#### **Non-customized or slightly customized stores, other X-Cart branches (4.0.x, 3.5.x):**

If the version of your X-Cart belongs to the 3.5.x or the 4.0.x branch, upgrading to 4.1.7 will be a very complicated task. You will need to do the following:

1. Apply one or more patches to bring your X-Cart version to the latest version of the branch (3.5.14 or 4.0.19 respectively).

The necessary patches can be downloaded from the Help Desk File area. Unfortunately, there are no upgrade packs for the 3.5.x and 4.0.x branches that can bring the older versions to the latest version of the branch directly. To upgrade an older version from the 3.5.x or 4.0.x branch to 3.5.14 or 4.0.19 respectively, you will probably need to apply several upgrade patches successively one after another. For example, you cannot just upgrade from 4.0.6 to 4.0.19: first, you will have to upgrade from 4.0.6 to 4.0.17 (using a jump patch), then from 4.0.17 to 4.0.18, and then from 4.0.18 to 4.0.19. You should understand that you will be able to apply the upgrade patches automatically through your store's Patch/Upgrade center only if your store is not customized. If your store has customizations, the patches will have to be applied manually, which requires experience in PHP, HTML and MySQL.

2. Upgrade your store's database to 4.1.7.

Upgrading of the database can be performed using a database upgrader provided in the Help Desk

File area. It is a utility that upgrades your store's database from the latest version of the branch to 4.1.7. Please note that you will be able to use the database upgrader only if your store's database structure has not been changed by a customization. Make sure you back up your store's database before upgrading it.

To perform the upgrade:

- a) Log in to the Help Desk.
  - b) In the File area, find the database upgrader:
    - 3.5.14-4.1.7\_sql\_upgrade.tgz - for the 3.5.x branch
    - 4.0.19-4.1.7\_sql\_upgrade.tgz - for the 4.0.x branch
  - c) Download the database upgrader TGZ file to your local computer.
  - d) Upload the TGZ file to the store server and unpack it to the directory in which X-Cart is installed.
  - e) Run the script `upgrade_sql.php`. To do so, point your web browser to the location `<Your_X-Cart_store_URL>/upgrade_sql.php` (like `http://www.example.com/xcart/upgrade_sql.php`) and press ENTER.
3. Install a new 4.1.7 X-Cart store. While running the 4.1.7 installer, specify the upgraded store database as the database to be used with the new installation. Also, select the checkbox 'Update config.php only' to keep the existing data.
  4. If your older store has any customizations, re-install them in the 4.1.7 store. Be prepared to resolve any conflicts that might arise as a result of transferring the code of your customizations to the newer X-Cart version.

If you cannot perform the upgrade yourself using the instructions above, feel free to order upgrade services from X-Cart technical support.

#### **Heavily customized stores:**

If your store has a lot of customizations, upgrading your X-Cart store will be very difficult, regardless of the version. It is best to order upgrade services from X-Cart technical support.

### **9.1.3 Putting PayPal to Work with X-Cart**

If you wish to use PayPal payment method at your X-Cart store, you need to follow these steps:

1. If you haven't yet done so, obtain a verified PayPal business account.  
See ['Obtaining a Verified PayPal Business Account'](#).
2. Apply and get approved for Website Payments Pro.  
(This step is required only for Website Payments Pro. Should not be performed for Website Payments Standard or Express Checkout used as an additional payment option):  
See ['Applying for Website Payments Pro'](#).

3. Set up your API access.

(This step is required for Website Payments Pro and for Express Checkout used as an additional payment option):

See '[Setting up Your API Access](#)'.

4. Add PayPal to the list of your store's active payment methods.

See '[Adding PayPal to the List of Your Store's Active Payment Methods](#)'.

5. Adjust PayPal configuration settings on the PayPal configuration page in X-Cart.

See '[Adjusting PayPal Configuration Settings in X-Cart](#)'.

If, after trying one PayPal solution, you decide to switch to a different one, you can readjust your PayPal configuration.

See '[Switching to a Different PayPal Solution](#)'.

If, after enabling PayPal payment method at your store, you decide not to use it, you can delete it.

See '[Deleting PayPal from the List of Your Store's Payment Methods](#)'.

### 9.1.3.1. Obtaining a Verified PayPal Business Account

To be able to use PayPal as a production payment method (no matter whether you wish to use Website Payments Standard, Website Payments Pro, Website Payments Pro Payflow Edition or Express Checkout standalone), you need a verified PayPal Business account. You can obtain a PayPal Business account either by signing up for a new Business account or by upgrading your existing PayPal account (Personal or Premier) to a Business account.

Merchants from the US and other countries (except the UK) should use the paypal.com website, UK merchants - the paypal.co.uk website.

If you do not have an existing PayPal account and wish to set up a new Business account:

1. Go to PayPal website and open the 'Merchant Services' page:

[http://www.paypal.com/cgi-bin/webscr?cmd=\\_merchant-outside](http://www.paypal.com/cgi-bin/webscr?cmd=_merchant-outside) for the US website,

[https://www.paypal.com/uk/cgi-bin/webscr?cmd=\\_merchant-outside](https://www.paypal.com/uk/cgi-bin/webscr?cmd=_merchant-outside) for the UK website.

2. Select a PayPal solution that you would like to use (Website Payments Standard / Website Payments Pro) and click the 'Sign Up' link below its name. You may also click the 'Sign Up' link at the top of the page and choose a PayPal solution later.

**Note:** If you wish to use Express Checkout as an additional payment option, you should select Website Payments Pro, but you do not need to submit the Website Payments Pro application and do not need to complete the Pro billing agreement.

3. Choose a Business account.

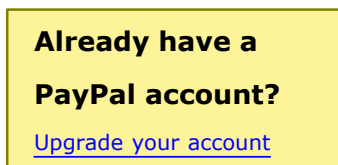
4. Select the country or region where you live from the drop-down menu.

5. Provide the information required to set up a Business account (account/business owner name, address, email, business name and address, customer service information).

6. Confirm the email address that you used for sign up (Check your email inbox. Click the link in the PayPal confirmation email. Enter your password and click 'Confirm'.)
7. Add and confirm a bank account to become a Verified member. The process may take up to 3-5 business days.

If you already have a Personal or Premier PayPal account and wish to upgrade to a Business account:

1. (US merchants): Point your browser to [https://www.paypal.com/cgi-bin/webscr?cmd=\\_registration-run](https://www.paypal.com/cgi-bin/webscr?cmd=_registration-run).  
(UK merchants): Point your browser to [https://www.paypal.com/uk/cgi-bin/webscr?cmd=\\_registration-run](https://www.paypal.com/uk/cgi-bin/webscr?cmd=_registration-run).
2. Click the 'Upgrade your account' link in the yellow box towards the upper right hand corner:



3. Click the 'Upgrade Now' button.
4. Follow the instructions to upgrade to a Business account.
5. Add and confirm a bank account to become a Verified member. The process may take up to 3-5 business days.

### 9.1.3.2. Applying for Website Payments Pro

*This step is only required for Website Payments Pro (Should not be performed for Website Payments Standard or Express Checkout used as an additional payment option).*

To apply for PayPal Website Payments Pro:

1. Go to [https://www.paypal.com/us/cgi-bin/webscr?cmd=\\_dcc\\_hub-inside](https://www.paypal.com/us/cgi-bin/webscr?cmd=_dcc_hub-inside).
2. Click on the 'Submit Application' link on the page and provide the required information.
3. Submit the application.
4. Wait to be approved (Approval takes between 24 and 48 hours.) Check your email for the approval notice.
5. Once approved, go back to [https://www.paypal.com/us/cgi-bin/webscr?cmd=\\_dcc\\_hub-inside](https://www.paypal.com/us/cgi-bin/webscr?cmd=_dcc_hub-inside). You should see the 'Complete Billing Agreement' link. Click on this link to accept the Pro billing agreement.

**Important:** You will not be able to use DirectPayment API unless you get approved and accept the Pro billing agreement.

### 9.1.3.3. Setting up Your API Access

*This step is required for Website Payments Pro and Express Checkout used as an additional payment option.*

To enable X-Cart to work with your PayPal Business account, you need to obtain your API credentials from PayPal. API credentials identify you when you make API calls. API credentials for X-Cart consist of an API username, an API password, and a third credential that can be either an API signature or an API SSL client-side certificate.

To obtain your API credentials:

1. Log in to your PayPal account and click the 'Profile' subtab.
2. Click 'API Access' in the 'Account Information' column.
3. Click 'Request API Credential'.
4. Select the type of credential: API signature or API SSL client-side certificate. (API signature is a 128-bit signature that is included in your API calls to identify you as an authorized caller. API SSL client-side certificate is an SSL certificate that is installed on your web server).

**Important:** Please note that to be able to use an API SSL client-side certificate as your credential, you need to be able to install the certificate on the web server in the directory `<xcart_dir>/payment/certs/`, where `<xcart_dir>` is the name of the directory in which X-Cart is installed.

5. Click 'Submit'.

If you select API Signature, your credentials will simply be provided to you on the next page. From now on, they will be stored in your profile ('Profile' subtab->'API Access' link->'View or Remove Credentials').

If you select API SSL client-side certificate, your API Username and API Password will be provided to you on the next page the same way as if you had requested an API Signature, while the API Certificate will need to be downloaded. To download your API certificate, click the 'Download Certificate' button on the 'Download or Remove API Certificate' page. You will be prompted to download a file called `cert_key_pem.txt`. This file is your API Certificate. You will need to put this file in `<xcart_dir>/payment/certs/`.

### 9.1.3.4. Adding PayPal to the List of Your Store's Active Payment Methods

To provide PayPal payment method to your customers, you need to add PayPal to the list of your store's payment methods and to enable it:

1. Go to the 'Payment methods' section in X-Cart Admin area (Administration menu->Payment methods).

2. Add PayPal to the list of payment methods in the 'Payment methods' dialog box:
  - a) Scroll down to the 'Payment gateways' dialog box at the bottom of the page.
  - b) Select 'PayPal' from the list of payment gateways (PayPal can be found in the 'Payment systems' subsection of the list).
  - c) Click the **Add** button.

A payment method titled 'PayPal' is added to the bottom of the list in the 'Payment methods' dialog box.

**Payment methods** Language: English

[Check all](#) / [Uncheck all](#)

	METHODS	SPECIAL INSTRUCTIONS	PROTOCOL	MEMBERSHIP	POS.
<input checked="" type="checkbox"/>	<input type="text" value="Credit Card"/> Extra charge: <input type="text" value="0.00"/> \$ <input type="checkbox"/> Cash on delivery method	<input type="text" value="Visa, Mastercard, American Express"/>	<input type="text" value="HTTPS"/>	<input type="text" value="All"/> <input type="text" value="Premium"/> <input type="text" value="Wholesale"/>	<input type="text" value="0"/>
<input checked="" type="checkbox"/>	<input type="text" value="Check"/> Extra charge: <input type="text" value="0.00"/> \$ <input type="checkbox"/> Cash on delivery method	<input type="text" value="Check payment"/>	<input type="text" value="HTTP"/>	<input type="text" value="All"/> <input type="text" value="Premium"/> <input type="text" value="Wholesale"/>	<input type="text" value="0"/>
<input checked="" type="checkbox"/>	<input type="text" value="Gift Certificate"/> Extra charge: <input type="text" value="0.00"/> \$	<input type="text" value=""/>	<input type="text" value="HTTP"/>	<input type="text" value="All"/> <input type="text" value="Premium"/> <input type="text" value="Wholesale"/>	<input type="text" value="15"/>
<input type="checkbox"/>	<input type="text" value="PayPal"/> Extra charge: <input type="text" value="0.00"/> \$	<input type="text" value=""/>	<input type="text" value="HTTP"/>	<input type="text" value="All"/> <input type="text" value="Premium"/> <input type="text" value="Wholesale"/>	<input type="text" value="999"/>

Payment systems **PayPal**: [Configure](#) | [Delete](#)

4. Enable PayPal payment method:
  - a) In the 'Payment methods' dialog box, select the check box to the left of 'PayPal' payment method.
  - b) Click the **Update** button at the bottom of the dialog box.

The page is refreshed. The payment method for PayPal is enabled in the store.

If, after adding PayPal payment method, you look at 'PayPal' entry in the 'Payment methods' dialog box, you should see the following line below it:



Payment systems **PayPal**: [Configure](#) | [Delete](#)

The link [Configure](#) allows you to go to a page where you can adjust PayPal configuration settings. After adding and enabling PayPal, you should follow this link to configure PayPal configuration settings (Instructions for adjusting PayPal configuration settings for different PayPal solutions are available in the chapter '[Adjusting PayPal Configuration Settings in X-Cart](#)').

### 9.1.3.5. Adjusting PayPal Configuration Settings in X-Cart

The page allowing you to adjust PayPal configuration settings can be accessed by clicking the link '[Configure](#)' below PayPal entry in the 'Payment methods' dialog box. The page is titled 'Payment gateways', and it contains a dialog box titled 'Settings'. The upper part of the 'Settings' dialog box provides names of PayPal solutions pre-integrated with X-Cart and allows you to choose a solution that you would like to use at your store. The lower part provides a set of fields that need to be adjusted to configure the selected solution (The contents of the lower part changes depending on the solution selected).

To adjust the configuration settings for your store's PayPal payment method, you need to select the PayPal solution that you wish to use and to adjust the respective set of configuration fields that will appear in the lower part of the dialog box.


#### Adjusting Website Payments Standard settings

To adjust settings for PayPal Standard:

1. In the 'Settings' dialog box, select the 'Website Payments Standard' option:

Settings

Please, select the PayPal solution you want to use:



**Website Payments Standard**  
Customers shop on your website and pay on PayPal.

**Website Payments Pro**  
Customers shop and pay on your website. Available only to US merchants.  
[Click here for signup guidelines >>](#)

**Website Payments Pro Payflow Edition**  
Customers shop and pay on your website. Please only select this option after talking with a US or UK sales representative or account manager from PayPal.

**Express Checkout**  
PayPal is provided to customers as an additional payment option. Customers use the shipping and billing information stored at PayPal to pay at your store.  
[Click here for signup guidelines >>](#)

---

Account:

Payment for:

Currency:

Order prefix:

Test/Live mode:

Note: To use test mode you need to get additional accounts at [PayPal Sandbox](#) and [PayPal Developer Central](#).

2. Adjust the fields in the lower part of the dialog box as follows:

- Account: Enter the e-mail address you use to access your PayPal Business account.
- Payment for: Provide a generic description of the products being sold. This field will show what the customer is buying (i.e. books, music, etc). This field is optional.
- Currency: Select the currency to be used for PayPal payment transactions.
- Order prefix: Enter your trading name or any other prefix that will help you identify a payment transaction as originating from this store. This field is not required.
- Test/Live mode: Select PayPal operating mode ('live' should be selected for live stores, 'test' - for

testing. Information on using PayPal in test mode is provided in the section '[Testing X-Cart's PayPal Integration](#)').

3. Click the **Update** button to save the changes.

## **Adjusting the settings for Website Payments Pro and Website Payments Pro Payflow Edition**

For PayPal Pro, X-Cart provides two options: 'Website Payments Pro' and 'Website Payments Pro Payflow Edition'.

### **To adjust settings for Website Payments Pro:**

1. In the 'Settings' dialog box, select the option 'Website Payments Pro':

### Settings


Please, select the PayPal solution you want to use:

**Website Payments Standard**  
Customers shop on your website and pay on PayPal.

**Website Payments Pro**  
Customers shop and pay on your website. Available only to US merchants.  
[Click here for signup guidelines >>](#)

**Website Payments Pro Payflow Edition**  
Customers shop and pay on your website. Please only select this option after talking with a US or UK sales representative or account manager from PayPal.

**Express Checkout**  
PayPal is provided to customers as an additional payment option. Customers use the shipping and billing information stored at PayPal to pay at your store.  
[Click here for signup guidelines >>](#)



---

API Access username:

API Access password:

Use PayPal authentication method:  API Signature  API Certificate

API certificate filename: xcart\_dir/payment/certs/

API Signature:

Currency:

Test/Live mode:  Note: to use test mode you need to get an additional account at PayPal Sandbox

Order prefix:

2. Adjust the fields in the lower part of the dialog box as follows:

- API Access username and API Access password: Enter your API Username and API Password as provided by your PayPal account.
- Use PayPal authentication method: Select the authentication method that you would like to use (API Signature or API Certificate).

- API certificate filename: Specify the location of your API certificate file (Only needs to be completed if you selected API Certificate as your PayPal authentication method).
- API signature: Copy and paste your API Signature (Only needs to be completed if you selected API Signature as your PayPal authentication method).
- Currency: Select the currency to be used for PayPal payment transactions.
- Test/Live mode: Select PayPal operating mode. ('live' should be selected for live stores, 'test' - for testing. Information on using PayPal in test mode is provided in the section [Testing X-Cart's PayPal Integration](#)).
- Order prefix: Provide a prefix that will help you identify a payment transaction as originating from this store (Not required).

3. Click the **Update** button to save the changes.

**To adjust settings for Website Payments Pro Payflow Edition:**

1. In the 'Settings' dialog box, select the option 'Website Payments Pro Payflow Edition':

### Settings


Please, select the PayPal solution you want to use:

**Website Payments Standard**  
Customers shop on your website and pay on PayPal.

**Website Payments Pro**  
Customers shop and pay on your website. Available only to US merchants.  
[Click here for signup guidelines >>](#)

**Website Payments Pro Payflow Edition**  
Customers shop and pay on your website. Please only select this option after talking with a US or UK sales representative or account manager from PayPal.

**Express Checkout**  
PayPal is provided to customers as an additional payment option. Customers use the shipping and billing information stored at PayPal to pay at your store.  
[Click here for signup guidelines >>](#)



---

Vendor:	<input style="width: 100%;" type="text"/>
Partner:	<input style="width: 100%;" type="text"/>
User:	<input style="width: 100%;" type="text"/>
Password:	<input style="width: 100%;" type="password"/>
Express Checkout specific: Require Confirmed Shipping Address:	<input type="checkbox"/> No <input type="checkbox"/>
Express Checkout specific: Page Style:	<input style="width: 100%;" type="text"/>
Express Checkout specific: Header Image URL:	<input style="width: 100%;" type="text"/>
Currency:	<input style="width: 100%;" type="text" value="US Dollar (United States)"/>
Test/Live mode:	<input type="checkbox"/> test <input type="checkbox"/> <small>Note: to use test mode you need to get an additional account at PayPal Sandbox</small>
Order prefix:	<input style="width: 100%;" type="text"/>

2. Adjust the fields in the lower part of the dialog box as follows:

- Vendor: Enter the vendor name (login ID).
- Partner: Enter the partner name.
- User: Enter your user name, if used.

- Password: Enter your password.

**Note:** The values for the fields 'Vendor', 'Partner', 'User' and 'Password' are supplied to you by PayPal after you sign up for Website Payments Pro Payflow Edition.

- Currency: Select the currency to be used for PayPal payment transactions.
- Test/Live mode: Select PayPal operating mode. ('live' should be selected for live stores, 'test' - for testing. Information on using PayPal in test mode is provided in the section ['Testing X-Cart's PayPal Integration'](#)).
- Order prefix: Provide a prefix that will help you identify a payment transaction as originating from this store (Not required).

3. Click the **Update** button to save the changes.

No matter whether you configure Website Payments Pro or Website Payments Pro Payflow Edition, you will end up with two 'PayPal' entries under 'Payment Methods': one for Direct Payment and one for Express Checkout:

**Payment methods** Language:

[Check all](#) / [Uncheck all](#)

	METHODS	SPECIAL INSTRUCTIONS	PROTOCOL	MEMBERSHIP	POS.
<input checked="" type="checkbox"/>	<input type="text" value="Credit Card"/> Extra charge: <input type="text" value="0.00"/> \$ <input type="checkbox"/> Cash on delivery method	<input type="text" value="Visa, Mastercard, American Express"/>	<input type="text" value="HTTPS"/>	<input type="text" value="All"/> <input type="text" value="Premium"/> <input type="text" value="Wholesale"/>	<input type="text" value="0"/>
<input checked="" type="checkbox"/>	<input type="text" value="Check"/> Extra charge: <input type="text" value="0.00"/> \$ <input type="checkbox"/> Cash on delivery method	<input type="text" value="Check payment"/>	<input type="text" value="HTTP"/>	<input type="text" value="All"/> <input type="text" value="Premium"/> <input type="text" value="Wholesale"/>	<input type="text" value="0"/>
<input checked="" type="checkbox"/>	<input type="text" value="Gift Certificate"/> Extra charge: <input type="text" value="0.00"/> \$	<input type="text"/>	<input type="text" value="HTTP"/>	<input type="text" value="All"/> <input type="text" value="Premium"/> <input type="text" value="Wholesale"/>	<input type="text" value="15"/>
<input type="checkbox"/>	<input type="text" value="PayPal Pro: ExpressChe"/> Extra charge: <input type="text" value="0.00"/> \$	<input type="text"/>	<input type="text" value="HTTP"/>	<input type="text" value="All"/> <input type="text" value="Premium"/> <input type="text" value="Wholesale"/>	<input type="text" value="999"/>
Payment systems <b>PayPal Pro:</b> <a href="#">Configure</a>   <a href="#">Delete</a>					
<input checked="" type="checkbox"/>	<input type="text" value="PayPal Pro: DirectPaym"/> Extra charge: <input type="text" value="0.00"/> \$	<input type="text"/>	<input type="text" value="HTTP"/>	<input type="text" value="All"/> <input type="text" value="Premium"/> <input type="text" value="Wholesale"/>	<input type="text" value="999"/>
Payment systems <b>PayPal Pro:</b> <a href="#">Configure</a>   <a href="#">Delete</a>					

The names of PayPal methods suggested by X-Cart ('PayPal Pro: DirectPayment' and 'PayPal Pro: ExpressCheckout'), although quite informative for the store administrator, may not be informative enough for your customers. You by no means have to use the suggested names 'as is'. If you wish to change the names of your PayPal payment options, simply edit the corresponding names in the METHODS column and click the **Update** button.

## Adjusting Express Checkout settings


To adjust settings for Express Checkout as an additional payment option:

1. In the 'Settings' dialog box, select the 'Express Checkout' option:



### Settings

Please, select the PayPal solution you want to use:



- Website Payments Standard**  
Customers shop on your website and pay on PayPal.
- Website Payments Pro**  
Customers shop and pay on your website. Available only to US merchants.  
[Click here for signup guidelines >>](#)
- Website Payments Pro Payflow Edition**  
Customers shop and pay on your website. Please only select this option after talking with a US or UK sales representative or account manager from PayPal.
- Express Checkout**  
PayPal is provided to customers as an additional payment option. Customers use the shipping and billing information stored at PayPal to pay at your store.  
[Click here for signup guidelines >>](#)

---

API Access username:

API Access password:

Use PayPal authentication method:  API Signature  API Certificate

API certificate filename: xcart\_dir/payment/certs/

API Signature:

Currency:

Test/Live mode:  Note: to use test mode you need to get an additional account at PayPal Sandbox

Order prefix:

2. Adjust the fields in the lower part of the dialog box the same way as for [Website Payments Pro](#).

### 9.1.3.6. Switching to a Different PayPal Solution

If, after configuring X-Cart to work with a certain PayPal solution, you decide to change the PayPal solution being used (for example, if you wish to switch from Website Payments Standard to Express Checkout), you can easily do so:

1. Click the [Configure](#) link below the existing 'PayPal' entry in the 'Payment methods' dialog box.

**Note:** If the 'Payment methods' dialog box contains two 'PayPal' entries, which happens in stores using Website Payments Pro solution, feel free to use any of the [Configure](#) links displayed under these entries.

2. From the 'Settings' dialog box, select the PayPal solution that you wish to use instead of the one used currently.
3. Adjust the configuration fields for the selected solution (See the section '[Adjusting PayPal Configuration Settings in X-Cart](#)').
4. Click the **Update** button to save the changes.

### 9.1.3.7. Deleting PayPal from the List of Your Store's Payment Methods

If, after PayPal has been added to the list of your store's payment methods, you decide not to use PayPal, you can remove it from the list of your store's payment methods. To do so, click the link [Delete](#) below the 'PayPal' entry in the 'Payment methods' dialog box.

**Note:** If the 'Payment methods' dialog box contains two 'PayPal' entries, which happens in stores using Website Payments Pro solution, feel free to use any of the [Delete](#) links displayed under these entries.

Note that, if you add PayPal to the list of your store's payment methods again after PayPal has been removed from there, the PayPal solution and the configuration settings used by the restored PayPal payment method will be the same as in the PayPal payment method that was removed.

## 9.1.4 Testing X-Cart's PayPal Integration

Before you make PayPal publicly available as a payment method on your store website, you may want to run some PayPal transactions in test mode to familiarize yourself with PayPal and to ensure that everything works correctly.

Follow these steps:

1. Obtain a verified PayPal business account.  
See the chapter '[Obtaining Accounts for Testing](#)'.
2. Set your store's PayPal integration to work in test mode.

See the chapter '[Setting Your Store's PayPal Integration to Work in Test Mode](#)'.

3. Conduct test PayPal transactions.

See the chapter '[Using PayPal in Test Mode](#)'.

### 9.1.4.1. Obtaining Accounts for Testing

**Testing of PayPal's Website Payments Standard, Website Payments Pro and Express Checkout solutions** is performed using the *PayPal Sandbox* - a self-contained testing environment for PayPal applications. The Sandbox is a mirror of the real PayPal site except that real financial transactions are not made. To be able to access the PayPal Sandbox, you need to have an account at Developer Central. You do not need an existing live PayPal account in order to sign up for Developer Central. After becoming a member of Developer Central, you will be able to access the Sandbox either directly or by launching it after you log in to Developer Central.

To sign up for a Developer Central account:

1. Go to <https://developer.paypal.com>.
2. Click 'Sign Up Now'.
3. Follow the on-screen instructions.

After you submit the required information to PayPal, PayPal sends login instructions to the email address you used to sign up. Follow the instructions provided to you in the email message to log in to Developer Central. Now you can create the accounts required for testing.

Basically, you need accounts of two types: Business and Personal. A Personal Sandbox account is needed to make test payments via PayPal, a Business Sandbox account - to accept these payments.

Creating a test account in the Sandbox is easy:

1. After logging in to Developer Central, click 'Sandbox'.
2. Click the link 'Create account'.
3. Select the type of account that you wish to create (Business or Personal).
4. Follow the on-screen instructions to create the account.

After creating the necessary Sandbox accounts, you will be able to log in to the Sandbox as a test user of the necessary type.

To log in to the Sandbox using a specific test account:

1. Log in to Developer Central.
2. Click the 'Sandbox' tab.
3. Select the test user that represents the feature you want to test.
4. Click 'Launch Sandbox'.

Please note the following:

- Sandbox accounts are not in any way tied to your PayPal account on [www.paypal.com](http://www.paypal.com).
- When creating a Sandbox account, your email address attached to that account does not need to be real. It can be any email address, as long as the email address does not already exist on the Sandbox.
- Email from the Sandbox will never be delivered to the email address you enter. All email generated by the Sandbox is captured and displayed by the Developer Central email client.
- After creating a Sandbox account, you may want to confirm the email address for the sandbox user. Check the email client on Developer Central to confirm your email address.
- After creating a Sandbox account, you can also attach a test credit card and bank account for testing.
- More information about the Sandbox is available in the PayPal's Sandbox User Guide ([https://developer.paypal.com/en\\_US/pdf/PP\\_Sandbox\\_UserGuide.pdf](https://developer.paypal.com/en_US/pdf/PP_Sandbox_UserGuide.pdf)).

**Testing of PayPal's Website Payments Pro Payflow Edition solution** is performed using the *PayPal Manager* - the same administration interface that you should use for live transactions, <https://manager.paypal.com>. You will be able to access this interface as soon as you set up your production merchant account.

### 9.1.4.2. Setting Your Store's PayPal Integration to Work in Test Mode

Your store's PayPal integration can be set to work in test mode as follows:

#### **Website Payments Standard:**

1. Go to the PayPal configuration page in X-Cart Admin zone.
2. From the 'Settings' dialog box, select the desired option ('Website Payments Standard').
3. Adjust the configuration fields for the selected option:
  - Specify your Sandbox Business account.
  - Configure the fields 'Payment for', 'Currency', 'Order prefix' as desired.
  - Set PayPal operating mode to 'Test'.
5. Click the **Update** button to save the changes.

#### **Website Payments Pro and Express Checkout used as an additional payment option:**

1. Log in to your Sandbox Business account to obtain API credentials for the test mode (The Sandbox Business account backoffice is organized similarly to the backoffice of your production PayPal Business account, so API credentials for the test mode can be obtained the same way as described in the section '[Setting up Your API Access](#)', with the difference that the Business account in the Sandbox should be used instead of the production account).
2. Go to the PayPal configuration page in X-Cart Admin zone.

3. From the 'Settings' dialog box, select the desired option ('Website Payments Pro' or 'Express Checkout').
4. Adjust the configuration fields for the selected option:
  - Specify the API access credentials as provided by your Sandbox Business account.
  - Configure the fields 'Currency' and 'Order prefix' as desired.
  - Set PayPal operating mode to 'Test'.
5. Click the **Update** button to save the changes.

#### Website Payments Pro Payflow Edition:

1. Go to the PayPal configuration page in X-Cart Admin zone.
2. From the 'Settings' dialog box, select the desired option ('Website Payments Pro Payflow Edition').
3. Adjust the configuration fields for the selected option:
  - Configure the fields 'Vendor', 'Partner', 'User' and 'Password'.
  - Configure the fields 'Currency' and 'Order prefix' as desired.
  - Set PayPal operating mode to 'Test'.
6. Click the **Update** button to save the changes.

When you return to the list of your store's payment methods after setting PayPal to work in test mode as described above, there should be a warning message below the 'PayPal' entry:



<input type="checkbox"/>	PayPal		HTTP	All	999
	Extra charge: 0.00	\$		Premium Wholesale	
Payment systems <b>PayPal</b> : <a href="#">Configure</a>   <a href="#">Delete</a>					
 Warning! PayPal Pro is currently set up to work in test mode!					

This is normal when X-Cart's PayPal integration is in test mode. Now you can perform test PayPal transactions.

### 9.1.4.3. Using PayPal in Test Mode

#### Website Payments Standard, Website Payments Pro and Express Checkout solutions:

The test accounts that you set up in the PayPal Sandbox allow you to explore how PayPal works for merchants and customers. To find out about the merchant's side of the matter, you need to log in to the Sandbox as a user of the 'Business' type. To make test PayPal payments and to learn about the customer's side of the matter, you need to log in to the Sandbox using a 'Personal' account.

**Important:** In the test mode, to pay for an order using a PayPal payment method, you need to be logged in to Developer Central. Developer Central sessions time out quickly, so it is recommended you log in to Developer Central shortly before going to checkout. The recommended method for logging in to Developer Central is to open a new window in the web browser being used for viewing the store directly before you click the **Checkout** button on the Shopping cart page and to use that window for logging in to Developer Central. Please note that, if you happen to go to checkout without previously logging in to Developer Central, or if your Developer Central session expires by the time you begin checking out, you will be able to complete checkout, but the process will be a little less streamlined (After selecting PayPal as a payment method and clicking the **Submit order** button, you will be offered to log in to Developer Central. After logging in, you will be supposed to click the **Back** button of your web browser several times to return to the store's 'Place order' page. There you will need to click the **Submit order** button again to resume the checkout process.)

**Website Payments Pro Payflow Edition solution:**

The first time you log in to PayPal Manager, you are in Test status (the Home page of PayPal Manager indicates this). This means that you can run mock or test transactions to familiarize yourself with PayPal Manager and make sure your account is set up correctly. These test transactions are not sent to financial institutions for processing, and no money trades hands.

When you are ready to run actual transactions, you will change to Active, or Live status. To change to Active status or see which status you are in, go to the Home page of PayPal Manager and look at the 'Your Account Status' section on the right side. Even after your account is active, you can still perform test transactions if necessary.

At any time, you can activate your account (change to Live status) by clicking the **Activate Your Account** button on the Home page.

Make sure you have an internet merchant account before you activate your PayPal services account. Otherwise, your live transactions will fail.

## 9.1.5 Working with Orders Placed through PayPal

### Obtaining information about orders placed through PayPal

Orders that your customers place selecting PayPal as a payment method are accumulated in the 'Orders Management' section of your store, along with all other orders.

The current status of an order placed through PayPal appears in the 'STATUS' box pertaining to that order - the same way as for orders paid by other methods.

Detailed information is available on the 'Order details' page. Information about the payment transaction (s) pertaining to the order appears on the 'Order details' page as follows:

- 'Order info' section of the 'Order details' dialog box: Name of the payment method used, order amount.

<b>Order info</b>	
Payment method	PayPal Pro: ExpressCheckout (PayPal Pro, in test mode)
Delivery method	
Subtotal	\$59.99
Discount	\$0.00
Coupon saving	\$0.00 ()
Shipping cost	\$0.00
<b>TOTAL</b>	<b>\$59.99</b>

- 'Order details (not visible to customer and provider)' section of the 'Order details' dialog box: Advanced info about the transaction by which the customer paid for the order (as received from PayPal and interpreted by X-Cart's PayPal payment module).

Order details (not visible to customer and provider):

[View mode](#)   [Edit mode](#)

```

--- Advanced info ---
Reason: Approved; Accepted Status: Completed Reason: none ( TransactionID:
9U746167AB6315614, TransactionType: express-checkout, GrossAmount: 59.99,
FeeAmount: 2.04, TaxAmount: 0.00)
CVV info: not set /
                    
```

- 'PayPal transactions' dialog box (not available for orders paid using Website Payments Standard):
  - 'Original transaction' section - Comprehensive information about the transaction by which the customer paid for the order.
  - 'Refund transactions' section - Information about the refund transaction (or a series of partial refund transactions) by which the original payment was refunded. Is displayed only if the original transaction was refunded by the store administrator.

### PayPal transactions

This section allows you to view detailed information about the PayPal payment transaction, update the information about the transaction and issue a full or partial refund for the transaction.

---

#### Original transaction

Payment method: PayPal Website Payments Pro  
 Used API: Express Checkout  
 Transaction ID: 9U746167AB6315614  
 Transaction type: expresscheckout  
 Payer ID: QSTLJ3Q756JE4  
 Payer status: verified  
 Payer email: xcart\_paypal@example.com  
 Receiver ID: XPFKZPRQR79U6  
 Amount: 59.99 USD  
 Last updated: 15-03-2007 22:02:18

---

#### Refund transactions

TRANSACTION ID	AMOUNT	DATE	NOTE
Refunds list is empty			

---

#### Issue refund

Creating a refund transaction does not affect the state of the order in your store. It affects neither the status of the order nor its total amount.

Amount:

Note:

## Understanding the statuses of orders placed through PayPal

As orders placed through PayPal are processed, they receive statuses according to the scheme used by X-Cart (see the chapter [X-Cart Order Statuses](#)). The statuses that you most typically see in the 'STATUS' boxes of orders for which PayPal is used as a payment method are *Not finished*, *Queued*, *Processed* and *Failed*. These statuses are assigned to orders automatically based on the statuses of the respective payment transactions on PayPal:

- When a customer places an order selecting PayPal as a payment method, the order is created with the status *Not finished*.
- Sometimes it happens that a transaction cannot be processed by PayPal immediately and is assigned



a temporary status 'Pending'. After X-Cart receives a notification thereof from PayPal, the status of the respective order in X-Cart is changed from *Not finished* to *Queued*.

- As soon as a customer's payment is processed by PayPal, the order status in X-Cart is changed to *Processed*.
- If a customer's payment is declined by PayPal, the status of the respective order in X-Cart is changed to *Failed*.

Assigning of any other statuses to orders paid through PayPal has to be done manually. For example, if an order successfully processed by PayPal and completed by the store needs to be marked as such, you have to select *Complete* from the 'STATUS' box of the respective order and update the status.

## Updating information about the transaction by which the customer paid for the order

For orders paid through Website Payments Pro, Website Payments Pro Payflow Edition or Express Checkout, detailed information about the transaction by which the customer paid for the order is displayed in the 'Paypal transactions' dialog box in the 'Orders Management' section (See the 'Original transaction' subsection). You can obtain the latest available information about this transaction at any time: simply click the **Update** button in the 'Original transaction' section. X-Cart will submit your request to PayPal server and the information in the 'Original transaction' section will be updated.

## Issuing refunds

X-Cart allows you to issue refunds for orders paid through Website Payments Pro, Website Payments Pro Payflow Edition and Express Checkout.

Orders paid for using Website Payments Pro or Express Checkout can be refunded either at once (by issuing a single refund transaction for the entire sum of the original transaction) or in portions (by issuing several partial refund transactions one after another). If you choose to do a refund as a series of partial refund transactions, you will have to specify the amount for each of the partial refund transactions separately.

Orders paid for using Website Payments Pro Payflow Edition can be refunded only by issuing a refund for the entire sum of the original transaction at once.

To issue a refund:

1. Open the 'Order details' page of the order that needs to be refunded.
2. Scroll down to the 'PayPal transactions' dialog box.

3. Use the 'Issue refund' section of the 'PayPal transactions' dialog box to create a refund:
  - a) In the 'Amount' field, enter the amount to be refunded (*Available only for Website Payments Pro. For Website Payments Pro Payflow Edition, the refund amount is already specified, and it equals the order amount*).
  - b) In the 'Note' field, provide a note stating the reason of the refund.
  - c) Click the **Create** button.

As soon as the refund request is successfully received and processed by PayPal, the refund transaction appears in the 'Refund transactions' section of the 'PayPal transactions' dialog box. For each refund transaction, the following information is available:


- TRANSACTION ID - Transaction ID;
- AMOUNT - Refund amount;
- DATE - Date when the transaction was performed;
- NOTE - Note with which the refund was issued.

## 9.2 Authorize.Net

To set up the "Authorize.Net: AIM" payment method in X-Cart you should follow the steps below:

1. Enable the "Authorize.Net: AIM" payment method: log into X-Cart as administrator, then go to the Administration -> Payment methods page and select the check box to the left of "Authorize.Net: AIM".
2. Set a MD5-Hash value: log in to the Authorize.Net back-office, go to the Account page, scroll down to the Security Settings section and click on the MD5-Hash link.
3. Request a Transaction Key: log in to the Authorize.Net back-office, click on Settings and Profile, under the Security heading, click on Obtain Transaction Key. You will be prompted to submit the *Secret Question/Answer* for the account in order to receive your transaction key.
4. Update the "Authorize.Net: AIM" payment method settings: log into X-Cart back-end, go to the Administration -> Payment methods page, click on the Configure link to the right of the "Credit Card processor AuthorizeNet: AIM":

### Settings

**Authorize.Net**  
Certified  
Shopping Cart

Account type:

API Login ID:

Transaction key:


Currency:

MD5 hash value:

Test/Live mode:   
If you choose LIVE mode in the selectbox above, please make sure LIVE mode is set up in your merchant account settings.

Order prefix:

Supports 3-D Secure Payer Authentication. Go to [3-D Secure Transaction options](#) to enable it.



**Account type:** Authorize.Net

**API Login ID:** enter the login to your Merchant account.

**Transaction key:** enter the transaction key you have received from Authorize.Net.

**Currency:** select the currency to be used in Authorize.Net transactions.

**MD5 hash value:** enter the MD5 Hash Value to use the MD5 security checks.

**Test/Live mode:** select *test* or *live* mode from the drop-down box.

**Order prefix:** any value, can be blank

**Note:** If you choose LIVE mode in the "Test/Live mode" selectbox, please make sure LIVE mode is set up in your merchant account settings.

Authorize.Net supports 3-D Secure Payer Authentication. Go to General settings -> 3-D Secure Transaction options to enable it.



# 10 Appendices

This section provides supplementary materials on the use of X-Cart:

- [Origin-Destination Tables for X-Cart's Real-time Shipping Modules](#)

## 10.1 Origin-Destination Tables for X-Cart's Real-time Shipping Modules

The following are Origin->Destination tables for real-time shipping methods supported by X-Cart:

### Intershipper

USA -> USA

USA -> Canada

Canada -> USA

### FedEx (table-based)

USA -> USA

USA -> Canada

USA -> Puerto Rico

USA -> Alaska

### FedEx (FedEx Direct API)

Worldwide

### CanadaPost

Canada -> Canada

Canada -> USA

### UPS

USA -> Worldwide

Europe -> Worldwide

Canada -> Worldwide

Mexico -> Worldwide

Puerto Rico -> Worldwide

Other origins -> Worldwide

### USPS

USA -> USA

USA -> Worldwide

**DHL/Airborne**

USA -> USA

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