X-GiftRegistry add-on module
for X-Cart 4.1.12

User Manual

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User Manual

This User Manual is intended for X-GiftRegistry add-on module for X-Cart v. 4.1.12. It covers most of the areas of the add-on module's installation and use and is applicable for both X-Cart GOLD and X-Cart PRO versions.

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Thank you for choosing X-Cart software solutions!

1 Introduction

X-GiftRegistry is an optional add-on for X-Cart shopping cart software. Designed for your customers' convenience, this module is a powerful means to promote the efficiency of your online sales.

X-GiftRegistry meets the specialized needs of customers who believe planning is the right way to success. Using the module enables you to expand the scope of services offered by your store, which is sure to enhance the appeal of your site for visitors and increase client satisfaction.

X-GiftRegistry module is a reliable and up-to-date solution that makes your business competitive. You can purchase this add-on at www.x-cart.com.

The module is intended for creating Gift Registries for different events (for instance a birthday, a wedding, etc). Gift Registries are a good tool for managing put off products (Wish list) and allow to:
  • sort out products by event according to what products you'd like to buy for this or that occasion;
  • inform your friends about your plans and wishes;
  • keep track of products being bought

This module supplements the Wish List and can't be activated without activation of the Wish List. It increases the functionality of the Wish List with a number of new features. Namely, you get the ability to:
  • create and manage 'events'. Each event has the following set of characteristics:
    • status: public/private/disabled
    • date of event
    • title
    • description shown to the guests in the events list of Search results and in the Wish List of the event
    • HTML-card which is customized HTML content created by the author of the event (for example, detailed info about place and time of an event) which is opened in a pop-up window when a guest visits event wish list
  • create 'event wish lists' - sets of products you would like to be bought for a particular occasion (including Gift Certificates and configurations).
  • control who may access event information and event wish lists.
  • create 'recipients lists' - lists of names and e-mail addresses of event participants to whom notifications of the event and event wish list contents will be sent.
  • edit and preview the e-mail notification content
  • import/ export recipients list in CSV-format (the option may be switched off in General settings/Gift Registry options)
  • use guest books where visitors can leave messages regarding this or that event (it may be disabled)
  • move products between event wish lists and the main wish list (any product may be added to the event wish list only through the main wish list)

• track the amount of purchased products in event wish list

Distributives of X-GiftRegistry module are provided as an archive file x-giftreg-x.y.z.tgz, where x.y.z. are numbers of the version. Module distributives are released together with new X-cart versions and are numbered according to the X-cart version.

2 Installation

Learn to install and uninstall X-GiftRegistry:

- installing X-GiftRegistry
- uninstalling X-GiftRegistry

2.1 Installing the module

The process of installing the module X-GiftRegistry is the same for X-Cart Gold and X-Cart Pro.

To install the module, take the following steps:

1. Download the module distributive from the File area. The file you need is named **x-giftreg-x.y.z.tgz**, where x, y and z are the numbers of the module version (must be the same as the version of your X-Cart).

2. Uncompress the archive file **x-giftreg-x.y.z.tgz** and copy the resulting files to the directory where your X-Cart is installed. The file INSTALL.X-GIFTREG provides instructions for installing the module.

   Note: Please make sure you keep the directory structure during unpacking and uploading, otherwise some necessary files can be overwritten!

3. Run in the browser the installation script: **http://www.yourhost.com/xcart_dir/install-xgiftreg.php** X-GiftRegistry installation wizard will be launched.

4. Enter your authentication code, read the License Agreement and, if you accept the terms and conditions of the License Agreement, click the **Next** button.

   Note. The authentication code is issued on completion of X-Cart installation. It is used to prevent unauthorized re-installation of X-Cart. You also need to know this code to install any purchased X-Cart modules. If you do not remember your Auth code, you can look it up at any time in the file include/install.php.

5. The installation script will copy the files and make all the necessary changes in the database.

   Note. If, while running the installation, you get any messages marked red, it means some errors were encountered and the installation has not been completed properly. Resolve the issues causing the installation process to be interrupted and run the installation wizard from the beginning.

   Click on **Next** to proceed.

6. After the installation is completed, you will get a message informing you of the completion of the installation process.

Now you need to enable the module and configure it for work with your X-Cart based store.

2.2 Uninstalling the module

To uninstall X-GiftRegistry, do the following:

1. Launch the Installation Wizard (Point your browser at the location of your store with the addition of / install-xgiftreg.php)

2. At the first step of the Installation Wizard (**Step 1: License agreement**), select the 'Un-install the module' radio button.

3. Click the **Next** button.

4. The Installation Wizard will remove the module files and deactivate the module (**Step 2: Uninstalling the module**). Click **Next** to proceed.

5. **Step 3: Uninstallation complete** is the final step of the uninstallation process. It notifies you that the module has been successfully uninstalled.

Important: After uninstalling X-GiftRegistry, be sure to remove the module distribution package from your web directory.

3 Using X-GiftRegistry

3.1 Enabling and configuring the module

Log in to the Admin area. Go to the 'Modules' section. Enable the module **Gift Registry** by selecting the checkbox next to it. Click on **Update** at the bottom of the page.

Go to the General settings/Gift registry options section and adjust the module settings:

- **Maximum number of lists per user:** the maximum amount of events that each user can determine. Default number is 5.

- **Maximum number of recipients per user:** the maximum amount of recipients for each event. Default number is 15.

- **Events per page:** an amount of events displayed on one page with results of search.

- **Disable the recipients import/export possibility for the customer:** this option is used to forbid import/export of recipients list for users. If admin thinks that the computer skills of his store users are not too good and there are not enough comments on 'Recipients import/export' page he can use this option and disable this ability.

- **Enable HTML cards:** if you enable this option, event creators will be able to enter their own HTML code to create HTML cards for their events.

  To reduce the risk of malicious code being injected into web pages displaying such cards, X-Cart will process the HTML code entered by event creators to strip out all potentially dangerous code (like OBJECT tags and JavaScript), leaving only safe HTML tags.

Note. If the module Wish list is disabled then Gift Registry module will also be disabled.

3.2 Event Creation

Events may be created in one of these ways

1. Through the main wish list : Wish List menu >click on New Event link
2. Through Gift Registry: Gift Registry Menu> click on New Event link

To create an event you are supposed to fill in the following fields:

- Status
- Title
- Event Date

Status field displays the current state of an event and sets the access level for visitors of the site.

- public - all visitors can see and buy products from the event wish list.
- private – only registered users whose e-mail addresses were entered in the recipients list can see and buy products from the event wish list.
- disabled - the event is not accessible to users.

Note. Until an event has some products in wish list and recipient list you'd better assign 'disabled' status to this event.

In HTML-content field you need to enter the code of the HTML page which will be opened in a pop-up window when a user visits this page. The contents of this field will be displayed in the pop-up window without any changes and additions, that's why you are supposed to have some knowledge and skills of HTML language to create HTML pages. You can also use Microsoft Frontpage for making HTML pages.

Note: You need to check the way an HTML page looks when transferring it to HTML-card. You can use a link in event list in "HTML-card" column for it.
A page that was correctly displayed on a local computer may be distorted when transferred to HTML-card due to loss of images or other objects. That is why you should use only HTML formatted text in HTML card or place image files on some other site and give correct links to them.

3.3 Recipients List

Recipients list contains info about all recipients of an event including:

• e-mail;

• name;

• current status

Recipients list can be filled in manually or imported through the corresponding interface (the feature can be disabled by administrator). The maximum amount of recipients in the list is limited by administrator.

Add new recipient

Recipient name	Recipient's e-mail

[Update]

Import recipients list

The recipients list can be imported from a CSV-format file. This file should contain columns with data for recipients names and/or recipients e-mails separated by the delimiter you choose. After import is completed, all imported recipients will get the status 'Pending' and you will have to send a confirmation request to activate them in the recipients list.

Column order:
The list below defines the order of columns in CSV file ('NULL' means there is no field).
0: [recipient_name ▼]
1: [recipient_email ▼]

CSV delimiter:
[Semicolon ▼]

CSV file for upload:
[_____] [Обзор...]

☐ Overwrite recipient's name for existing e-mails

[Import]

To avoid spam each recipient should confirm their participation in the list of event delivery. You should perform the following actions:

1. Mark checkboxes opposite the recipients
2. Send a request to confirm the recipients' participation by clicking on 'Send confirmation request' link. The current status will be displayed in the field 'Status': "Sent" and the date of the last status change.

The notification contains the offer to confirm or cancel your participation in delivery list, for example:

```
Mr. [Sender name] has sent this invitation for you.

_____

Dear [Recipient name],

Your e-mail address has been included into the Gift registry's mailing list for
Please confirm or decline your participation by clicking on the links below.

_____

Click here to confirm:
```
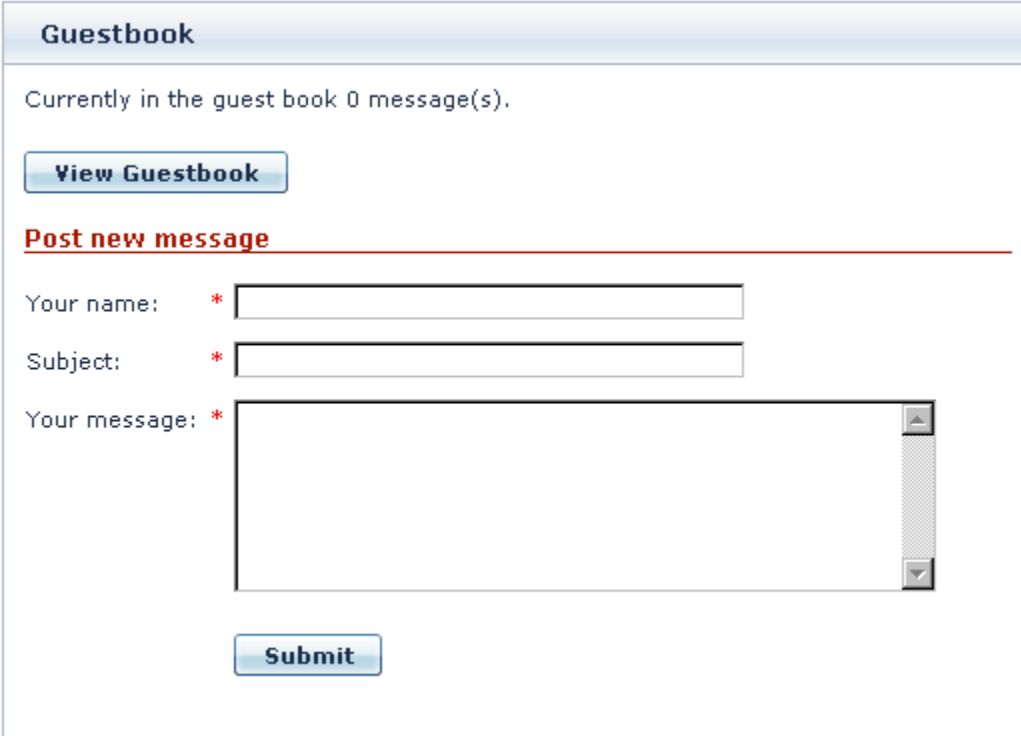
```
http://www.yourhost.com/xcart_dir/customer/giftregs.php?cc=782ab3a60469e12499e13259519e2


Click here to decline:

http://www.yourhost.com/xcart_dir/customer/giftregs.php?cc=c72ce5192251b1fb9f9ff1eea0c944




--

Thank you for using

X-Cart shopping system

X-CART

Phone: 1-800-555-5555

Fax: 1-800-555-5555

URL:    WWW.X-CART.COM
```

After the recipient chooses one of the variants, his participation will either be cancelled or confirmed, and the confirmation date will appear besides the current status ('Confirmed'   'Declined') in the field 'Status'

3.4 Guestbook

Recipients can leave their messages and comments regarding any event in the Guestbook. To post a message to the Guestbook a recipient is supposed to enter:

• his name;

• subject;

• message text.

Filling in all the fields is a must.

The owner of the event can answer and delete messages. His replies are highlighted.

Messages are displayed in the reverse chronological order.

The Guestbook can be disabled by the owner of the event.

3.5 Adding Products to Event Wish List

You can add products and Gift Certificates to events wish list only through the main wish list:

    1. First, a product is added to the Wish list ('Add to wish list' button)

    2. Then in the Wish list this product may be partially of fully moved to the wish list of a registered event.

By partial moving the following is meant:

There is a product N quantity=5 in Wish list:

Main wish list: product N (quantity=5)

You can move some items of the products to event wish list 'Birthday'

Main wish list: product N (quantity=3)

'Birthday' event wish list: product N (quantity=2)

Note: If you change the amount of product items in event wish list, for example

'Birthday' event wish list: product N (quantity=1)

then the amount in the Main wish list will not be changed, i.e. you'll get:

Main wish list: product N (quantity=3)

'Birthday' event wish list: product N (quantity=1)

and the total amount of product items will be changed.

The functionality of event wish list is the same as of the main wish list, thus you can:

• add a product to cart

• delete a product from the wish list

• change the amount of product items

• see detailed info about a product

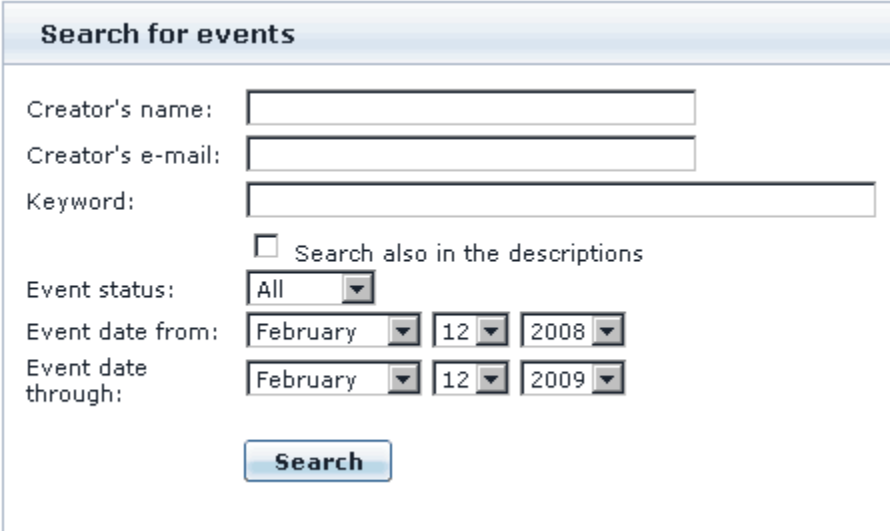The maximum number of events that a user can define is limited by administrator.

3.6 Event Search

All site visitors can search for and look through the events that have 'public' status and buy products included in event wish lists.

Only registered users whose e-mails are included in recipients list of this event can look through 'private' events.

Event search is fulfilled by the following criteria.
- template of the event owner's name
- event owner's e-mail
- a key word for search in the header and product description
- event status
- timeframes of an event

If no search criteria were assigned, all events of the database will be delivered.

3.7 Event Viewing and Purchase of Products

To enter an event page and see the wish list the following conditions need to be met:

1. An event has "public" status
2. An event has "private" status if a visitor is a registered user and his/her e-mail is included into Recipients list of this event

Only registered store users have the ability to add products from event wish list to their cart.

To add a product to your cart you should click on 'Add to cart' link. The product will be placed in your cart with the options and number of items defined in the wish list. If a customer is not satisfied with these settings they can be changed right in the cart.

After checkout is successfully finished, either the number of bought items is displayed below the corresponding products in event wish list or 'All items already purchased' if the whole product is bought (such a product cannot be added to cart from event wish list)

Shipping and taxes cost calculations are made depending on the customer's location and the purchased products are sent to this address.

3.8 E-mail Notification

To successfully send a notification about this or that event there should be at least one recipient in the recipient list who confirmed his/her participation.

On 'E-Mail Notification' page you can edit the text of the notification, indicate the subject of the e-mail and the way of posting, which can either be HTML page or plain text. It is highly recommended to preview your text message before sending.

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