

# X-Cart v. 4.2.3

## User manual



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



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## User manual

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*This is the User manual for X-Cart shopping cart software, v. 4.2.3. This manual covers the installation and use of X-Cart 4.2.3 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 4.2.3.*

## **X-Cart v.4.2.3. User Manual.**

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## Welcome to X-Cart 4.2.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 4.2 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.
- Check out [What's New in X-Cart 4.2](#) for details on the new features introduced in X-Cart 4.2.
- Study [Licensing](#) for a 'plain words' explanation of X-Cart's licensing policy.

## 1.1 Getting Help

This User 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.qtmsoft.com>).

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](#)

- [Types of 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 website promotion tools, search engine optimization, multilanguage 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's back end (the area 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's 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's 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's back end will affect the entire store. The way in which the store's 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 areas with separate access: *Admin area* and *Provider area*. Store administration and management staff members are given access to this or that area 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 users with the administrator profile 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 Types of 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* or simply *admin*). 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 area 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 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 area. 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 area and Provider area 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 administrator 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 administrator</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</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>

Type of task	Administrator account is used to:	Provider account is used to:
	<ul style="list-style-type: none"> <li>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>	
Customizing the store's look&feel	<ul style="list-style-type: none"> <li>• edit X-Cart templates</li> <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's back end is a single environment in which there is no subdivision into Admin and Provider areas. 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 can only be created manually by users with full administrator privileges (store administrators not assigned to [membership level](#) 'Fulfillment staff') via the 'Users Management' section of the Admin area.

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

## 1.3 What's New in X-Cart 4.2

Here's a list of improvements introduced in X-Cart 4.2:

### Design and appearance

#### ▪ CSS based layout

The pages of X-Cart's Customer area now use a DIV-based, tableless layout. The <table> tag is no longer used for layout purposes; tables are used only to display tabular data. The appearance of the Customer area is now fully controlled by CSS.

The advantages brought about by using CSS instead of tables include the following:

- The structural organization of X-Cart's pages has been improved. This is good for SEO, because web crawlers now find relevant content in the source code of X-Cart's pages more easily.
- With the presentational items placed separately in CSS files, X-Cart's pages have become smaller. This means that your server experiences less load, the page content is downloaded faster and uses less bandwidth.
- The main content of pages is now placed at the top of the source code. This causes the information to display first, leaving the presentational elements to load at the end. This way the main content of the page is immediately visible to the user; the user does not have to wait for an entire table with content and graphics to load as it happened with table based layout.
- The appearance of the storefront can now be changed significantly by editing the styles in CSS files (skin1/main\*.css).

At present, X-Cart's layout is based on the 'Light & Lucid' visual scheme. The rest of X-Cart's traditional layouts (3-columns, 2-columns, small shop), color schemes and dingbat sets have been removed.

#### ▪ Separate template sets for the store's Customer area and back end.

The templates of X-Cart's back end have been completely separated from the templates of X-Cart's

Customer area. Now you can customize the look and feel of the Customer area without fearing that you might ruin the design of the back end.

- **CSS/DIV-based pop-up windows**

X-Cart's Customer area now uses CSS/DIV-based pop-up windows instead of the standard pop-up windows used in the previous X-Cart versions. The new pop-up windows can be moved and resized.

- **No splash page**

X-Cart's splash page `index.html` has been removed. Now visitors of the store's Customer area get directly onto the Home page.

- **New method of displaying detailed product images**

It has become possible to enable such a mode of display of detailed product images where all the detailed images of a product will be displayed in the Customer area on the Product details page of the respective product as thumbnails below the main product image. When the mouse hovers over one of the detailed product image thumbnails, the respective detailed product image will be displayed in the place of the product's main product image; the size of the detailed product image in this case will be reduced to the size of the main product image. When a mouse click occurs on a detailed product image thumbnail, the respective detailed product image will be displayed at full size in a modal window. The modal window used to display detailed product images provides simple navigation controls allowing the user to view the next/previous detailed image of the product or select a specific detailed image of the product from the set. For more information, see the section [Detailed Product Images](#).

## SEO improvements

- **"Clean" URLs support**

Now it is possible to define user and search engine friendly URLs for the pages of products, categories, manufacturers and embedded static pages - "clean" URLs. X-Cart allows you to keep a history of clean URL changes for each page so users can find the pages they have bookmarked even after the clean URLs of these pages change. For more information, see the section [Using Clean URLs](#).

- **Changes in the way meta tags are defined and used**

It has become possible to define description and keywords meta tags for the product pages of your store. In previous versions of X-Cart, these meta tags were generated for product pages automatically based on the contents of the 'Product name' and 'Short description' fields. Now you have full control over the meta description and keywords of your product pages and can adjust these tags separately.

It has also become possible to define description and keywords meta tags for the manufacturer and embedded static pages of your store.

We also added an option allowing the description and keywords meta tags defined for a category to be used for the subcategories and products contained in that category.

As before, the 'General settings/SEO options' section of the Admin area allows you to provide description and keywords meta tags for your store site in general; however, these meta tags are now used differently: they are now applied only to those pages that do not have any meta description and keywords tags of their own and are not using any other meta description and keywords. For more information, see the section [Using Page Title and Meta Tags](#).

## Images

- **Automatic generation of product image thumbnails** (GDLib 2.0 or better is required)

When creating or editing a product, it is now possible to automatically generate a product thumbnail from a previously uploaded product image. The resulting product thumbnail will be a reduced-size version of the product image from which it is generated. The size of automatically generated product thumbnails can be set by the store administrator. For more information, see the section [Defining Product Details](#).

## Shipping

- **Dimensional shipping**

It has become possible to specify dimensions for each of the products in the store (See the Product details page) and to use these dimensions for shipping rates calculation by such online real-time shipping rate calculation services as UPS, USPS, FedEx, etc.

X-Cart now provides a packaging algorithm that allows it to split a single shipment into multiple packages in accordance with the limitations (maximum package weight and dimensions) imposed by the selected online real-time shipping rate calculation service. With this algorithm, it has become possible to receive real-time shipping rates for a shopping cart even if this cart contains a large quantity of products whose total weight and volume make sending these products in a single package impossible due to the limitations of the selected online real-time shipping rate calculation service.

- **Shipping from providers and per-provider shipping cost** (X-Cart PRO)

It has become possible to specify an individual seller address for each provider and to use this seller address for shipping rates calculation by online real-time shipping rate calculation services. This improvement makes it possible to use X-Cart PRO for warehouse stores in which a common storefront is used to showcase the products of several different stores that ship products from different locations. A provider's seller address can be specified in the provider's user profile.

## Payment modules

- **Pre-authorization support for the following payment modules:**

The store administrator can now specify the mode in which they wish the payment transaction to be performed on order placement if a customer chooses to pay for the order using one of the following payment methods:

- \* PayPal Website Payments Standard
- \* PayPal Website Payments Pro
- \* PayPal Website Payments Pro Payflow Edition
- \* Express Checkout
- \* LinkPoint
- \* AuthorizeNet: AIM
- \* AuthorizeNet: SIM
- \* NetRegistry e-commerce
- \* Sage Pay VSP Direct
- \* Virtual merchant (New payment module that replaced ViaKlix)

Two modes are supported: “Auth and Capture” and “Auth only”:

- In the “Auth and Capture” mode, the customer’s card is billed at once as soon as the customer completes the payment (the authorization and capture actions are completed simultaneously; the store administrator does not have to perform any additional actions to capture the funds).

- In the “Auth only” mode, when the customer completes the payment, only authorization is performed to make sure the required funds are available on the customer’s account; the action of capturing the funds that have been authorized is postponed until the moment the store administrator manually performs the capture. The administrator may choose not to capture the authorized amount and unlock the temporary hold placed on the customer’s funds; in this case the administrator can void the authorization. For PayPal, Authorize.Net, LinkPoint, Sage Pay VSP Direct and NetRegistry e-commerce, the capture and void actions can be performed through X-Cart’s Admin area (using the ‘Capture’ and ‘Decline’ buttons on the order details page) or through the respective payment system account backoffice; for VirtualMerchant, the capture and void actions can be performed only through the VirtualMerchant account backoffice.

The system of X-Cart order statuses has been changed to accommodate the ‘Auth only’ mode: Now,

when a payment is performed as 'Auth only', the order is assigned the status 'Pre-Authorized'. Later on, after the authorized amount is successfully captured, the order status is changed to 'Processed'. If the initial authorization is voided, the order status is automatically changed to 'Declined'.

In connection with the Pre-authorization support feature, the following options have been added:

- Number of days in advance that you want a reminder to be sent to the Orders department e-mail address about an order in Pre-authorized status for which the authorization period is going to expire ([General settings/General options](#))
- Maximum fraud risk factor value after which an online payment transaction is performed in 'Auth only' mode, even if the payment module is set to work in a different mode ([General settings/Antifraud options](#))
- Allow customers ordering egoods to use only payment modules that support Pre-Authorization ([General settings/Egoods options](#))

#### ▪ **Payment module changes**

The following payment modules have been removed and are no longer supported:

- 2Checkout ver.1
- World Swift
- Bank of Asia
- Cambist
- EZTP
- GZS:PayMaster
- IO\*NGATE
- Secure-I
- Smart people
- SmartPag
- SurePay
- Trolley Gateway
- Velocity Pay
- viaKlix
- Bank of America
- Bank of America (web-based)

## **Miscellaneous**

#### ▪ **A customizable 404 error page for your store site**

X-Cart now has its own 404 error page. This is a new page in your store which can be used to display the 'Page not found' error (HTTP/1.0 404 Not Found) when a visitor attempts to access the store site

using a URL for which no page exists.

The 404 error page looks similar to the rest of your store site and provides navigation links allowing the visitor to go back to the store's home page or to take a look around the site.

The look and feel of X-Cart's 404 error page, as well as its textual content, can be changed by editing an HTML file. In stores supporting languages other than English, a version of the 404 error page can be easily created for each of the languages.

For more information, see the section [Adjusting the 404 Error Page](#).

- **More efficient management of news list mailing lists**

X-Cart now provides an easy method to export the entire list of subscribers of any news list to a CSV file. It has also become possible to remove selected subscriber addresses from a specific mailing list or from all the mailing lists by importing them into X-Cart as a list in CSV format. For more information, see the section [Mailing Lists](#).

- **Adjustable page filename format for the HTML catalog**

X-Cart now provides editable templates that define the format according to which X-Cart generates filenames for the product, category, manufacturer and embedded static pages when generating an HTML catalog. For each of the said types of pages, you can set up a separate page filename template. This feature gives you full control of the filename format by providing you with the ability to specify the components that you wish to be included into the filename and the order in which these components must be included. For more information, see the section [Adjusting the Format of Page Filenames for the HTML Catalog](#).

- **Adjustable currency symbol display format**

It has become possible to define the currency symbol display format for the primary currency and the alternative currency. For more information, see the section [General Options](#).

- **More flexible security settings**

A group of new security options has been added in the 'General settings/Security options' section. For more information, see the section [Security Options](#).

- **New logging options**

X-Cart now supports logging of user activity with secured data. For more information, see the section [Logging Options](#).

- **User interface improvements**

A number of small usability improvements have been made to X-Cart's user interface.

- **Smarty changes**

Smarty has been updated to the version 2.6.20 and moved from X-Cart root to the directory <xcart\_dir>/include/lib/smarty.

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

### 2.1 System Requirements

This section lists system requirements for X-Cart 4.2.

See:

- [Server Requirements](#)
- [Client-side Requirements](#)

#### 2.1.1 Server Requirements

##### Operating system



##### PHP configuration

###### PHP version

Version 4.1.0 - 5.x.

###### php.ini settings

required values:

safe\_mode = off

file\_uploads = on

magic\_quotes\_sybase = off

sql.safe\_mode = off

allow\_url\_fopen = on

ini\_set = on

memory\_limit >= 16M

recommended values:

disable\_functions = NULL

post\_max\_size >= 2M

upload\_max\_filesize >= 2M

max\_execution\_time >= 30

memory\_limit >= 32M

max\_input\_time >= 30

sendmail\_from = ...@domain.com (an email address, from which sending mail is allowed)

### PHP extensions

required:

PCRE

MySQL

recommended:

FTP - to be able to upload files to GoogleBase

Zlib - for data compression on the fly

GDLib 2.0 or better - required for automatic generation of product thumbnails from product images, for the 'Image Verification' module and for cache generation in the 'Detailed Product Images' module. GDLib must be compiled with libJpeg (ensure that PHP is configured with the option --with-jpeg-dir=DIR, where DIR is the directory where libJpeg is installed).

Mcrypt - highly recommended to speed up the Blowfish data encrypting process

xml/Expat - for Intershipper, UPS or USPS shipping modules.

cURL - for some of the online credit card processing modules and for shipping modules.

OpenSSL - for iDEAL Advanced and iDEAL RaboBank Professional payment modules.

### Other recommendations

- PHP should be compiled with the "--enable-memory-limit" option (strongly recommended).
- PHP should be compiled with the "--enable-mbstring" option. *mbstring* is designed to handle languages which use multibyte character encodings. For more information and a list of supported encodings, see the corresponding section of PHP manual.
- If you wish to use an external mail program (like qmail or postfix) instead of the PHP "mail()" function, this mail program must be installed and configured.
- If you wish to use an SMTP server instead of the PHP "mail()" function to send mail from the store, the SMTP server must be installed and configured.
- PHP function "exec()" must be allowed for the correct functioning of most of the CC payment processing modules used with X-Cart (SaferPay, Credomatic, CyberSource, HSBC, Ogone, Ogone Web, PayBox, PaySystems Client, VaultX), HTTPS modules (Net::SSLey, CURL, OpenSSL, https\_cli), GnuPG/PGP.
- PHP functions "popen()" & "pclose()" must be allowed for the correct functioning of some HTTPS modules (CURL, Net::SSLey, OpenSSL, https\_cli), payment modules (Saferpay, CyberSource), SMTP mailer (PHPMailer).

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

## MySQL configuration

### MySQL version

Supported versions: 3.23 - 5.X

Recommended version: 4.1.22

Not recommended versions: 5.0.50, 5.0.51 (These versions contain some known bugs that may prevent X-Cart from operating correctly).

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

### MySQL server settings

MAX\_CONNECTIONS >= 200 (required)

### MySQL user privileges

Required basic privileges:

select\_priv

insert\_priv

update\_priv

delete\_priv

lock\_tables\_priv

index\_priv

Privileges, required for software installation/upgrade:

create\_priv

drop\_priv

alter\_priv

### MySQL user limitations

Required values:

MAX\_QUESTIONS - no limitations

MAX\_UPDATES - no limitations

MAX\_QUERIES\_PER\_HOUR - no limitations

MAX\_USER\_CONNECTIONS - no limitations

Recommended values:

max\_allowed\_packet - 8-16 MB recommended

wait\_timeout - minimum 7200 (28800 recommended)

**Note:** a 'Lost connections' error may appear if the values of the options 'max\_allowed\_packet' and 'wait\_timeout' are too low.

### Apache configuration

Apache is the recommended web server. The settings described below refer to Apache only.

### Distributed configuration file

- The name of the file must be ".htaccess" (AccessFileName .htaccess).
- You must have sufficient permissions to change the settings of the web directory via the .htaccess file (AllowOverride = ALL).

### PHP running mode

If PHP is installed as CGI, it must be compiled with --enable-force-cgi-redirect (without --enable-discard-path).

### Apache modules

Basic modules:

- mod\_dir - is required for correct operation of DirectoryIndex
- mod\_access - is required for correct operation of Deny From All and Allow From All
- mod\_auth - is required for correct operation of HTTP authentication (HTTP authentication is used in Google Checkout module for additional Admin area protection)

Recommended modules

- mod\_userdir - is required for access to the website via a temporary URL (http://IP/~user).
- mod\_rewrite - is required for correct operation of the Clean URLs functionality.
- mod\_expires - is required to set up file caching.
- mod\_gzip / mod\_deflate - is required for page compression.

### HTTPS settings

- DocumentRoot directories for HTTP and HTTPS must be the same.
- PHP on HTTP and HTTPS must be run under the same user account.
- The php.ini file must be the same for HTTP and HTTPS.

### Disk space

A fresh installation of X-Cart 4.2.3 uses at least 30 megabytes of disk space (if installed without add-ons). 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 customizations.

## MySQL space

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 5 megabytes for small shops to over 500 megabytes for large stores.

## Advanced requirements and recommended settings

### Network settings

- Outgoing connections must be allowed for ports 80, 443 and 1129. Some payment and shipping systems may require additional ports.
- The server firewall must allow loopback connections. This is required for HTML catalog feature.
- External domains must be resolved on the level of PHP as well as on the system level. Such PHP functions as `gethostbyaddr` and `gethostbyname` must work without limitations.
- Domains hosted on a hosting with localhost must be resolved to an external IP address if the server is behind NAT.

### Other requirements

- A valid SSL certificate from the list of SSL certificates accepted by Google Checkout is required for correct operation of Google Checkout module. For more information, see the section ["What SSL certificates does Google Checkout accept?"](#) of Google Checkout Merchant Help.
- Windows or Linux operating system is required for HSBC payment method.
- The following functionality requires no less than 32 MB of memory: backing up/restoring the database, import and product modification.

**Important!** These are the basic system requirements. Some specific settings may be needed for different store configurations.

## 2.1.2 Client-side Requirements and Recommendations

### JavaScript

The users of X-Cart's back end must have JavaScript enabled in the web browser.

For the users of X-Cart's storefront, enabled JavaScript is recommended: JavaScript is not required for the basic storefront functionality: a user can register, log in, add a product to cart and check out without

JavaScript enabled; however, anything above that is not guaranteed to work without enabled JavaScript. For example, although a user will be able to buy a regular product with JavaScript disabled, they will not be able to buy a configurable product or a gift certificate.

If a user enters the store with JavaScript disabled, X-Cart displays a message asking this user to enable JavaScript in the web browser.

## Cookies

Both the users of X-Cart's storefront and back end must set their web browser to accept cookies. If a user enters the store using a browser that does not accept cookies and attempts to perform an operation that requires enabled cookies, X-Cart displays a message asking this user to enable cookies in the web browser.

## Screen resolution

Minimum required screen resolution for the storefront is 800x600 (recommended: 1024x768 or higher).

Minimum required screen resolution for the back end is 1024x768.

## Browser compatibility

X-Cart can be used with most web browsers, including the following:

- Microsoft Internet Explorer 6, 7, 8
- Mozilla FireFox for Windows v1.5, v2, v3
- Mozilla FireFox for MacOS v2, v3
- Mozilla FireFox for Linux v2, v3
- Opera for Windows v9.2, v9.5
- Opera for FreeBSD v9.5
- Opera for Linux v9.5
- Opera for MacOS v9.5
- Safari for Windows v3.1
- Safari for MacOS v2.0, v3.0, v3.1
- Mozilla for Linux v1.8
- Mozilla for FreeBSD v1.8

- Google Chrome

## 2.2 Installing X-Cart

X-Cart shopping cart software can be installed using X-Cart Installation Wizard or manually. Wizard installation is the recommended installation method; manual installation can be performed by advanced users.

See:

- [Installing X-Cart Using the Installation Wizard](#)
- [Installing X-Cart Manually](#)

### 2.2.1 Installing X-Cart Using the Installation Wizard

#### Installation procedure

To install X-Cart using the Installation Wizard:

1. Obtain an X-Cart distribution package by downloading it from the File Area section of your HelpDesk account <https://secure.gtmssoft.com> . 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 your hosting account.

*If you use a Windows-based server, or a UNIX-based 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 your hosting account.

*If you use a UNIX-based 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 your hosting account.
- b) Unarchive the package using one of the following commands:

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

or

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

After you decompress the archive with the distribution package you should get 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, feel free to rename 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. (For users of UNIX-based servers only) Change the permissions for the /xcart directory, 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 how to use the chmod utility, run command `man chmod` in the command line.

4. Open a web browser, and in the address bar enter the URL of the directory containing the X-Cart files plus the /install.php postfix (the filename of the installation script).

*For example*, if your domain name is `www.example.com` and the X-Cart files are located in directory /xcart inside the web root, the URL should be `http://www.example.com/xcart/install.php` .

This launches the X-Cart Installation Wizard.

5. Follow the instructions on the screen. Button **Next** moves to each new step step of the Installation Wizard.

Make sure you complete all of the steps. At the final step the Wizard displays a screen saying that the installation is complete together with the authorization code (Auth code) for the installed copy of the X-Cart software and instructions on how to access the store.

The steps of the Installation Wizard are as follows:

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

At the first step of the Installation Wizard, the script asks you to accept the X-Cart Software License Agreement. Carefully read the Agreement and select the 'I accept the License Agreement' check box if you agree with the terms and conditions expressed by in Agreement.

**Important!**

If you do not agree with the term and conditions of the X-Cart Software License Agreement, do not install the software and quit the Installation Wizard by closing the respective page of the web browser.

Click the **Next** button to continue the installation.



**X-Cart Installation Wizard**  
**Step 1: License agreement**

Version 4.2

**Thank you for choosing X-Cart.**  
**This wizard will provide you with the installation instructions and will handle most of the installation tasks for you.**

SOFTWARE LICENSE AGREEMENT

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PLEASE READ

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If it is not the first time you've launched the Installation Wizard on this server, you will also be asked to provide your *Auth code*:



**Auth code:**

This is a protection from unauthorized use of installation script

I accept the License Agreement

**Note:** An Auth code is a special key code that you get at the final step of the Installation Wizard when you install X-Cart for the first time. For details, see 'Step 10: Installation complete'.

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

At this step, the setup program performs environment checks (verifies that the files of the X-Cart distribution package you are using are unaltered and checks that the files and directories involved in the installation process have the required permissions) 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"):

<b>Environment checking</b>	
<b>Verification steps</b>	<b>Status</b>
Verifying the integrity of essential files ...	- [OK]
<b>Checking file permissions</b>	
	<b>Status</b>
Checking whether directory "files" is writable ...	- [OK]
Checking whether directory "catalog" is writable ...	- [OK]
Checking whether directory "images" is writable ...	- [OK]
Checking whether directory "skin1" is writable ...	- [OK]
Checking whether directory "var" is writable ...	- [FAILED]
Checking whether directory "var/cache" is writable ...	- [OK]
Checking whether file "config.php" is writable ...	- [FAILED]
Checking whether file "admin/newsletter.sh" is executable ...	- [OK]
Checking whether file "payment/ccash.pl" is executable ...	- [OK]
Checking whether file "payment/csrb.pl" is executable ...	- [OK]
Checking whether file "payment/netscleay.pl" is executable ...	- [OK]
<b>Inspecting server configuration</b>	
<b>Checking critical dependencies</b>	
	<b>Status</b>
PHP Version (min 4.1.0 required) ... 5.2.6	- [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]
<b>Checking non-critical dependencies</b>	
	<b>Status</b>
Disabled functions list ... none	- [OK]
Maximum file size for upload is ... 2M	- [OK]
fopen() function can open URLs ... On	- [OK]
GD library 2.0 ... OK	- [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 4.2

### Environment checking

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

Checking file permissions	Status
Checking whether directory ".pgp" is writable ...	- [OK]

Checking whether directory "var/cache" is writable ...	- [OK]
Checking whether file "config.php" is writable ...	- [OK]
Checking whether file "admin/newsletter.sh" is executable ...	- [OK]
Checking whether file "payment/ccash.pl" is executable ...	- [OK]
Checking whether file "payment/csrc.pl" is executable ...	- [OK]
Checking whether file "payment/netssleay.pl" is executable ...	- [OK]



fopen() function can open URLs ... On	- [OK]
Checking blowfish encryption mode ... OK	- [OK]

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

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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](#)

For successful installation, only two conditions are essential: 1) The files of the original X-Cart distribution package 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/user/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?

[Send report](#)

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 4.2

### 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 database name</b> The name of the database you connect to	<input type="text" value="xcart"/>
<b>MySQL user name</b> The name of the MySQL user	<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 the **Next** button. 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

Version 4.2

<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 database name</b> The name of the database you connect to	xcart
<b>MySQL user name</b> The name of the MySQL user	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)	English
<b>States table</b> States of the country where the shop is located (use Ctrl key to select multiple options)	Luxembourg Netherlands Spain United Kingdom (Great Britain) United States
<b>Sample categories/products</b> Would you like to setup sample categories and products?	Yes
<b>Configuration settings</b> Apply pre-configured settings to selected country	
<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>Blowfish key</b> If you want to use the database from another X-Cart installation (trial, etc.), enter the blowfish key which was used to encrypt the data in your database.	
<b>Store images in</b> Select where you want to store your images	File system

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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 using the 'Remove data' tool available in 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:** This option allows you to define whether you wish to keep the data stored in the MySQL database you specified at the previous installation step.

If you leave the 'Update config.php only' check box unselected, the installation script will drop any existing X-Cart tables from the database, create new tables and populate them with new data. If you select this check box, the installation script will just update the information in X-Cart's configuration file config.php keeping the existing database tables and data.

- **Blowfish key:** You must complete this field only if you have chosen to install X-Cart using a database left from another X-Cart installation (The check box 'Update config.php only' is selected). In this field, you must specify the Blowfish key by which the data in the database you are using is encrypted.
- **Store images in Database / File system:** This field allows you to define the location of your store's image repository.

Click the **Next** button.

#### 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.



### X-Cart Installation Wizard Step 4: Installing X-Cart database

Version 4.2

```
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_ing] ... [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_change_password] ... [OK]
Creating table: [xcart_class_ing] ... [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 the **Next** button to continue.

#### e) Step 5: Layout settings.

Select a layout that you wish to use for the front end of your store.

**X-Cart** X-Cart Installation Wizard  
Step 5: Layout settings

Version 4.2

**Layout settings:**

Select shop layout

Push the "Next" button below to begin the installation

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This step may be missing if there is only one layout skin available.

After the desired settings are selected, click the next **Next** button. 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.

**X-Cart Gold** X-Cart Installation Wizard  
Step 6: Setting up templates

Version 4.2

**Creating directories...**

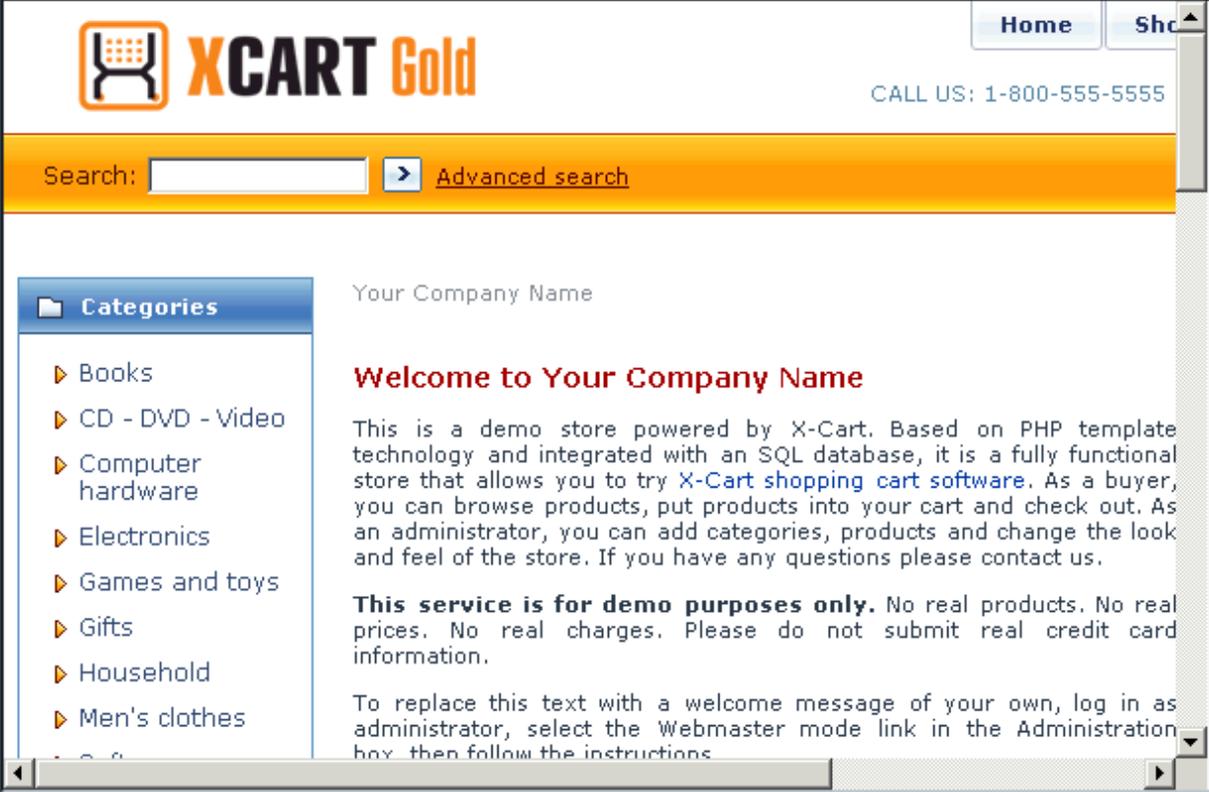
Creating directory: [var/log] ... [Already exists]  
 Creating directory: [var/tmp] ... [Already exists]  
 Creating directory: [var/templates\_c] ... [Already exists]  
 Creating directory: [var/upgrade] ... [Already exists]  
 Creating directory: [files/master] ... [OK]

**Copying templates...**

Creating directory: [skin1/404] ... [OK]  
 Creating directory: [skin1/admin] ... [OK]  
 Creating directory: [skin1/admin/main] ... [OK]  
 Creating directory: [skin1/buttons] ... [OK]  
 Creating directory: [skin1/customer] ... [OK]

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

Color/layout preview (click to refresh)



Home Show

CALL US: 1-800-555-5555

Search:

**Categories**

- ▶ Books
- ▶ CD - DVD - Video
- ▶ Computer hardware
- ▶ Electronics
- ▶ Games and toys
- ▶ Gifts
- ▶ Household
- ▶ Men's clothes

Your Company Name

### Welcome to Your Company Name

This is a demo store powered by X-Cart. Based on PHP template technology and integrated with an SQL database, it is a fully functional store that allows you to try X-Cart shopping cart software. As a buyer, you can browse products, put products into your cart and check out. As an administrator, you can add categories, products and change the look and feel of the store. If you have any questions please contact us.

**This service is for demo purposes only.** No real products. No real prices. No real charges. Please do not submit real credit card information.

To replace this text with a welcome message of your own, log in as administrator, select the Webmaster mode link in the Administration box, then follow the instructions.

Push the "Next" button below to continue

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If you are satisfied with the preview and wish to accept the selected layout style for your own store, click the **Next** button.

**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 Admin area of your store.



## X-Cart Installation Wizard Step 7: PayPal payment processing

**Version 4.2**

Do you wish to enable PayPal payment processing now?

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Click the **Next** button.

**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

**Version 4.2**

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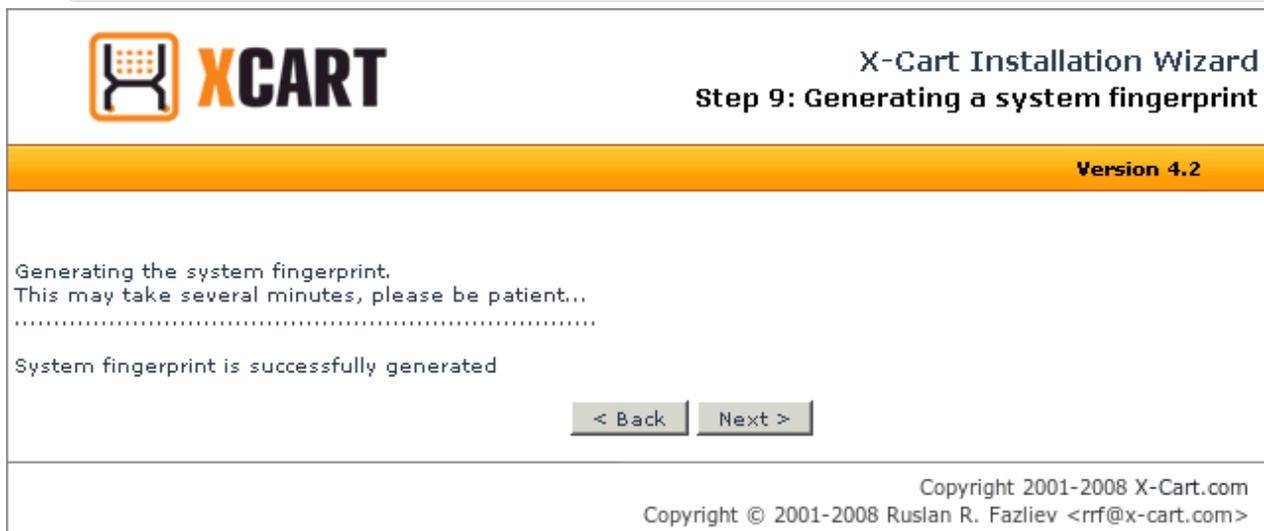
Click the **Next** button. A verification message will be sent to the email address provided at this step. To enable PayPal payments in your store, confirm your desire to use PayPal by clicking a web link in this

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 the **Next** button.

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. On the screen, you can see the following information:

- links for access to the newly installed store and credentials for access to the password-protected areas;
- Auth code for your X-Cart installation;
- security related post-install tips.



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

Version 4.2

### Installation complete

X-Cart software has been successfully installed. You can access your store using the links below:

1. **CUSTOMER AREA**
2. **ADMIN AREA**  
Username: master  
Password: xxxxxxxx

After you login to the Admin area for the first time using the credentials above, you will be prompted to change your password. Password change is required for security reasons.

Your auth code is **XXXXXXXXXX**.

You will need this code for access to the installation script in the future. You do not have to remember this code now, as you will be able to look it up at any time in the **'Summary'** section of your store's Admin area or in the file **include/install.php**.

To ensure the security of your X-Cart installation, the file **install.php** has been renamed to **install-file-YY-MM-DD-xxxxx.php**. If, in the future, you decide to re-install your store, change its skin set or install any X-Cart add-on modules, before you run the installation, you will need to rename the file **install-file-YY-MM-DD-xxxxx.php** back to **install.php**. If you are not going to use the installation script again, you can simply delete the file **install-file-YY-MM-DD-xxxxx.php**.

**Important:** To prevent unauthorized access to X-Cart source code, be sure to remove your X-Cart distribution package archive from your web-accessible directory.

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The same information is sent to the email address you provided at *Step 3* of the installation process (*Preparing to install X-Cart database*). In addition, the message you receive via e-mail also includes your Blowfish encryption key.

Auth code and Blowfish encryption key are two special key codes that you get after X-Cart installation is completed.

**Auth code** is a code 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. It is not necessary to remember this code: after X-Cart is installed, you can look it up at any time in the file `include/install.php` (see the variable `$installation_auth_code`). Also, you can find this code in the 'Summary' section of your store's Admin area.

**Blowfish key** is a code used to encrypt all sensitive data in your store including user passwords, order details, etc. This code is stored in the variable `$blowfish_key` in X-Cart's configuration file `config.php`. More

information about Blowfish key is available in the [Blowfish](#) section of this manual.

## Security related post-install tips

After the installation is completed, you must ensure the security of your X-Cart installation and source code. It is strongly recommended you do the following:

1. Protect the installation script `install.php`.

You must ensure that the installation script `install.php` you used to install X-Cart is well protected from unauthorized access. This is essential because anyone with access to this script can re-install your store or change your store's skin set/layout.

X-Cart provides a mechanism protecting the script `install.php` after the installation: at the last step of the installation procedure, `install.php` is renamed to something like `install-file-YY-MM-DD-xxxxx.php` (The new filename is displayed to you at the last step of the installation procedure and sent to you in the email notification). In the filename `install-file-YY-MM-DD-xxxxx.php`, the portion `YY-MM-DD` stands for the year, month and date when the file was renamed, and the portion `xxxxx` is a randomly generated code. After the renaming, the installation script cannot be run. To be able to use the installation script again, you need to change its name back to `install.php` using FTP, SSH or any other type of direct access to the file system (Control Panel and the like).

The renaming mechanism may fail if, for example, file renaming is forbidden on your system. If X-Cart fails to rename `install.php`, the 'Installation complete' message at the last step of X-Cart installation will say so. In this case, you will need to either rename the file `install.php` manually or remove it from the web-accessible directory keeping a copy of the file in a safe place. Later, if you need to re-install your X-Cart store, you will be able to re-upload the script `install.php` to `/xcart` directory and run the installation the same way you did it the first time.

2. Protect the X-Cart distribution package.

To prevent unauthorized access to X-Cart source code, be sure to remove the X-Cart distribution package archive you used to install your store from the web-accessible directory.

3. Protect X-Cart files and directories.

You must ensure that the files and directories of your X-Cart installation are protected by secure permissions.

During X-Cart installation, the installation script automatically sets the required secure permissions on the files and directories that need to be protected. If it is not able to change the permissions, the 'Installation

complete' message at the last step of X-Cart installation will say so and provide a list of files/directories for which the permissions need to be re-adjusted. Be sure to re-adjust the permissions as advised.

## 2.2.2 Installing X-Cart Manually

It is assumed that you are installing X-Cart on a UNIX-based server with terminal access and you have adequate skills in using the basic UNIX commands.

### Installation procedure

To install X-Cart manually:

1. Obtain an X-Cart distribution package by downloading it from the File Area section of your HelpDesk account <https://secure.gtmssoft.com> . The distribution package you need is contained in the archive file x-cart-x.y.z.tgz, where x, y and z are the X-Cart version numbers.
2. Use an FTP client to upload the archive with the distribution package to a web accessible directory of your server or your hosting account.
3. Decompress the package using one of the following commands:

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

or

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

After you decompress the archive with the distribution package you should get 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, feel free to rename 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.

4. Change directory to the X-Cart root directory.

```
> cd xcart
```

5. Setup a MySQL database which you are going to use with X-Cart.

**Note:** The shell commands listed below use the following abbreviations:

<name> : the username for your MySQL user account;

<pswd> : the password for your MySQL user account;

<db\_host> : the DNS name or the IP-address of your MySQL server;

<db\_name> : the name of your MySQL database.

- a) Clear all the data which the database might contain, create the required tables and populate them with data. You can use the following shell commands:

```
> mysql -u<name> -p<pswd> -h<db_host> <db_name> < sql/dbclear.sql
> mysql -u<name> -p<pswd> -h<db_host> <db_name> < sql/xcart_tables.sql
> mysql -u<name> -p<pswd> -h<db_host> <db_name> < sql/xcart_data.sql
> mysql -u<name> -p<pswd> -h<db_host> <db_name> < sql/xcart_language_US.s
```

- b) If you want to test the newly installed store and import a sample product catalog which is similar to the one you could try with the online demo available at the product website [www.x-cart.com](http://www.x-cart.com) , run the following shell command:

```
> mysql -u<name> -p<pswd> -h<db_host> <db_name> < sql/xcart_demo.sql
```

Later on you will be able to remove the sample catalog using the Remove data tool available in the Summary/Tools section of the Admin area.

- c) If your company is based in a country that has states, or if you are planning to sell internationally and your customers are going to be from countries that have states, you may want to import the names of the states for each of these countries. Later on you will be able use the imported state names for setting up destination zones, your company address and user addresses.

To import the names of the states, run the shell command

```
> mysql -u<name> -p<pswd> -h<db_host> <db_name> < sql/states_<ctry>.sql
```

replacing the <ctry> part with one of the following values:

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

US for the United States.

If a particular country is missing from the list, you will be able to manually add the country and its states later. The instructions on how to carry out this task are available in the [States](#) section of this manual.

- d) For some countries X-Cart enables you to define pre-configured store settings. These settings include generic tax rules and rates, destination zones, default company and customer addresses and phone numbers, language variables which may differ from one country to another (e.g. *postal code* instead of *zip code*), etc.

By default, the store is installed with pre-configured settings for the United States. If your store is based in a country other than the United States, you may find it useful to import some pre-configured settings and thus speed up the process of configuring your store.

Currently pre-configured settings are available for the following countries: Australia, Canada and the United Kingdom (Great Britain). To import pre-configured settings for any of these countries, run the shell command

```
> mysql -u<name> -p<pswd> -h<db_host> <db_name> < sql/xcart_conf_<ctry>.s
```

replacing the *<ctry>* part with one of the following values:

AU for Australia

CA for Canada

UK for United Kingdom.

## 6. Create the required directories and set proper permissions.

- a) Set up permissions 777 for directories /files, /catalog and /var.

```
> chmod 777 files catalog var
```

- b) If you are planning to use the PGP encryption method, create the directory .pgp and set its permissions to 755.

```
> mkdir .pgp
> chmod 755 .pgp
```

- c) Set permissions to 755 for the script admin/newsletter.sh (The this script is used by the News Management module for sending newsletters).

```
> chmod 755 admin/newsletter.sh
```

- d) Set permissions to 755 for all the payment modules (files with the \*.pl extension inside the payment/ directory).

```
> chmod 755 payment/*.pl
```

## 7. Set up the skin.

a) Copy the contents of the directory /skin1\_original to the directory /skin1.

```
> cp -Rp skin1_original/* skin1
```

This will set up the default interface including the default skin Light & Lucid for the Customer area.

b) If you want to replace the default skin Light & Lucid with one of the alternative skins that come with the X-Cart distribution package, copy the directory with the skin to the directory /skin1. Use the command:

```
> cp -Rpf schemes/templates/<Skin_name>/* skin1
```

replacing the <Skin\_name> part with one of the following values:

artistictunes_business	for Artistic Tunes Business
artistictunes_car_tires	for Artistic Tunes Car Tires
artistictunes_fragrances_and_makeup	for Artistic Tunes Fragrances and Makeup
artistictunes_water_colour	for Artistic Tunes Water Colour
fashion_mosaic_blue	for Fashion Mosaic Blue
fashion_mosaic_green	for Fashion Mosaic Green
fashion_mosaic_grey	for Fashion Mosaic Grey
fashion_mosaic_pink	for Fashion Mosaic Pink
neon_lights_flowers	for Neon Lights Flowers
neon_lights_household	for Neon Lights Household
neon_lights_music	for Neon Lights Music
neon_lights_sport	for Neon Lights Sports
vivid_dreams_lotus	for Vivid Dreams Lotus
vivid_dreams_violet	for Vivid Dreams Violet
vivid_dreams_aquamarine	for Vivid Dreams Aquamarine

c) After you copy the skin files to the directory /skin1, set the permissions of every subdirectory and file inside the directory /skin1 to 777.

```
> chmod -R 777 skin1
```

d) To see the changes, clear the directory `var/templates_c` which contains compiled templates.

```
> rm -rf var/templates_c
```

8. Open X-Cart's main configuration file `config.php` for editing and set the true values for 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";
```

## Blowfish key

To ensure the safety of sensitive data in the database (user info, order details, etc.), X-Cart uses the Blowfish encryption algorithm. Encryption is performed using a special key code. In X-Cart, this code is referred to as a *Blowfish key*. The same code is used to decrypt the data when you or your authorized personnel is trying to access the encrypted data (e.g. when viewing an order in the Admin area).

X-Cart keeps the Blowfish in the main configuration file `config.php` in the variable `$blowfish_key`. Before the store is installed, the `$blowfish_key` variable contains a default value. When you install X-Cart using the Installation Wizard, the installation script `install.php` generates a new Blowfish key and writes it to the `$blowfish_key` variable in the `config.php` file. With manual installation, a new Blowfish key is never generated. And after the installation is complete, the `$blowfish_key` variable still contains the default value. Using the default Blowfish key is not secure, because its value is known to many people. And you need to generate a new value for the Blowfish key.

To generate a new Blowfish key you should go to the 'Summary/Tools' section of the Admin area and use the 'Re-generate the Blowfish encryption key' tool. For details on how to carry out this task see section [X-Cart's Advanced Tools](#).

If the newly installed store is supposed to use a database that was previously used by another X-Cart installation, the data in such database is already encrypted by the Blowfish key generated by that store. It means that neither you nor any of your customers will be able even to log in to their accounts, because the value of the variable `$blowfish_key` is different to the value of the key which was used to encrypt the store database. To resolve this issue, you need to open the main configuration file `config.php` for editing and change the value of the variable `$blowfish_key` to the value of the Blowfish key that was used by the

previous X-Cart installation.

## Security-related tips

After the installation is completed, you must ensure the security of your X-Cart installation and the source code of the software. We strongly recommend you follow the tips below.

### 1. Protect the installation script `install.php`.

It is important to protect the installation script `install.php`, located inside the X-Cart distribution package, from unauthorized access. Otherwise, anyone can run the script remotely and re-install the software, change the skin template and/or drop the store database.

Rename the installation script `install.php` or move it from the web-accessible directory to a safe place on the server so that nobody could run the script. If you need to run the installation script later, you can upload file `install.php` back to the X-Cart root directory or rename it back to `install.php` if you decided to change the filename.

For renaming and moving the script you can use FTP, SSH or any facility which provides direct access to the file system where the X-Cart files and directories are physically located.

### 2. Protect the X-Cart distribution package.

To prevent unauthorized access to source code of the X-Cart software, remove the archive with the X-Cart distribution package that you used to install your store (`x-cart-x.y.z.tgz`) from the web-accessible directory.

### 3. Protect X-Cart files and directories.

For all X-Cart files and directories must be set up secure permissions. Change the permissions as advised below.

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

## 2.3 X-Cart's Configuration Files

In X-Cart, the majority of configuration tasks can be done via your store's Admin area. However, system settings and settings that you are not going to change often are stored in X-Cart configuration files. To adjust these settings, you will need to edit the configuration files directly. At present X-Cart has two configuration files: `config.php` and `top.inc.php`.

See:

- [Configuration File config.php](#)
- [Configuration File top.inc.php](#)

**Important:** We strongly recommend you refrain from changing the configuration files unless you clearly understand what you are doing. Always make a backup copy of the file you are going to edit before you change anything.

## 2.3.1 Configuration File config.php

X-Cart's main configuration file config.php is located in the X-Cart root directory. config.php is a plain text file which keeps global definitions and directives for the installed copy of the X-Cart software. The values of the variables inside the file config.php should be edited very carefully since these settings affect general operating capability of your store.

The instructions below aim at helping you understand what each of the variables answers for so that you could configure your store correctly.

### SQL database details

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

This section of the config.php file keeps the details of the MySQL database that you use for your X-Cart based store. X-Cart uses the values of the variables inside this section to connect to the database. If the variables contain incorrect values, X-Cart won't be able to connect to the database and open any of the store pages. Instead, you will see an error message saying that X-Cart cannot connect to the MySQL server.

With automatic installation via the Installation Wizard you do not need to modify the values of these variables, because the installation script writes the new values to the variables according to info that you provide at the 3rd step of the Installation Wizard (Step 3: Preparing to install X-Cart database).

However, if you install X-Cart manually you need to edit the values of the variables and provide correct access info for the database and the database server. You may also need to edit the values of these variables when you transfer/copy your store to a different server or when your MySQL server details changes.

The variables in this section answer for:

- `$sql_host`: The DNS name or the IP-address of your MySQL server;
- `$sql_user`: The username for your MySQL user account;
- `$sql_db`: The name of your MySQL database;
- `$sql_password`: The password for your MySQL user account.

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

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

This section of the `config.php` file keeps the info about the physical location of the X-Cart files. X-Cart uses the values of the variables inside this section to correctly address to scripts, templates and other X-Cart files. If the variables contain incorrect values, X-Cart won't be able display pages correctly.

With automatic installation via the Installation Wizard you do not need to modify the values of these variables, because the installation script writes the new values to the variables according to info that you provide at the 3rd step of the Installation Wizard (Step 3: Preparing to install X-Cart database).

However, if you install X-Cart manually you need to edit the values of the variables and provide correct names of the host and the X-Cart root directory. You may also need to edit the values of these variables when you transfer/copy your store to a different server/location or when you change the DNS.

The variables in this section answer for:

- `$xcart_http_host`: The host name of the server on which X-Cart is installed.
- `$xcart_https_host`: The host name of the secure server which provides access to X-Cart via the HTTPS protocol.
- `$xcart_web_dir`: The web accessible directory of your server/hosting account where X-Cart files are located.

The variables `$xcart_http_host` and `$xcart_https_host` must contain host names only (**no** protocol prefixes 'http://' or 'https://', **no** trailing slashes). If you are not sure what the host name of your secure server is, contact your hosting team for help. In most cases the names of your secure and non-secure servers will be the same.

The name of your X-Cart directory must represent how the directory can be accessed from the Web, not from the file system. The general rule here is to put a slash before the name of the directory and no slash at the end (for example, `/xcart`). An exception to this applies to the situation you install X-Cart to the WWW root. In this case you must leave the variable empty.

*Example 1:*

If the store URLs are:

`http://www.example.com/xcart` and

`http://www.securedirectories.com/example.com/xcart`

the variables must have the following values:

```
$xcart_http_host = "www.example.com" ;
```

```
$xcart_https_host = "www.securedirectories.com/example.com" ;
```

```
$xcart_web_dir = "/xcart" ;
```

*Example 2:*

If the store URLs are:

`http://www.example.com/` and `https://www.example.com/`

the variables must have the following values:

```
$xcart_http_host = "www.example.com" ;
```

```
$xcart_https_host = "www.example.com" ;
```

```
$xcart_web_dir = "" ;
```

You can use domain aliases for your store; however, your store visitors will be redirected to the primary domain if they open the store through an alias. For example, if the store is installed to domain name `example.com` which has an alias `www.example.com`, store visitors will be redirected to `http://example.com` even if they open in their browsers `http://www.example.com`.

## Storing Customers' Credit Card Info

```
$store_cc = false;
```

The variable `$store_cc` allows you to define whether you wish to keep your customers' credit card info in the store database or not. Customers provide their credit card details at the checkout. This info includes:

- cardholder's name;
- card type;
- card number;
- "valid from" date (*for certain types of cards*);
- expiration date;
- card issue number (*for certain types of cards*).

The two possible values for the `$store_cc` variable are 'true' and 'false'. By default, the variable is set to 'false'. It means that X-Cart does not keep in its database any credit card info that your customers provide when paying for the products with their credit cards.

In this case, your customers' credit card info goes directly to the payment gateway which then processes the payment and sends the money to your merchant account. This way of accepting credit card payments online is common practice these days, because it allows you not to pay special attention to the advanced secure environment which is a must when it comes to keeping sensitive credit card info. Besides, keeping credit card info in a store database is **not** recommended by the major credit card authorities like VISA and MasterCard, because this task requires high security level of the environment that is used to operate the store (including servers and local computers) which can hardly be ensured by an individual or a medium-size business. Remember: when keeping credit card info in the store database, any possible vulnerability of the environment may result in data theft and potentially involves legal liability.

However, if your business model supposes keeping credit card info and you have adequate resources to ensure the required security level, you can allow X-Cart to keep credit card info in its database by changing the value of the variable `$store_cc` to 'true'. Or you can leave the value of the variable as 'false' and consider an alternative way of taking credit card info of your customers.

Also, the variable `$store_cc` must be set to 'true' if you are planning to use the Subscriptions module which introduces the ability to use recurring billing where money for certain products is automatically withdrawn from customer's credit cards at scheduled periods of time. For details on how to use the Subscriptions module, study section [Subscriptions](#) further in this manual.

## Storing CVV2 codes

```
$store_cvv2 = false;
```

The variable `$store_cvv2` allows you to define whether you wish to keep CVV2 codes of your customers' credit cards in the store database or not.

The two possible values for the `$store_cvv2` variable are 'true' and 'false'. By default, the variable is set to 'false'. It means that X-Cart does not keep in its database the CVV2 codes that your customers provide when paying for the products with their credit cards.

In this case, the CVV2 codes go directly to the payment gateway which then processes the payment and sends the money to your merchant account. This way of accepting credit card payments online is common practice these days, because it allows you not to pay special attention to the advanced secure environment which is a must when it comes to keeping sensitive credit card info including CVV2 codes. Besides, keeping CVV2 codes (especially with the rest credit card info) in a store database is **not** recommended by the major credit card authorities like VISA and MasterCard, because this task requires high security level of the environment that is used to operate the store (including servers and local computers) which can hardly be ensured by an individual or a medium-size business. Remember: when keeping credit card info (including CVV2 codes) in the store database, any possible vulnerability of the environment may result in data theft and potentially involves legal liability.

However, if your business model supposes keeping CVV2 codes and you have adequate resources to ensure the required security level, you can allow X-Cart to keep the codes in its database by changing the value of the variable `$store_cvv2` to 'true'. Or you can leave the value of the variable as 'false' and consider an alternative way of taking CVV2 codes of your customers' credit cards.

Also, the variable `$store_cvv2` must be set to 'true' if you are planning to use the Subscriptions module which introduces the ability to use recurring billing where money for certain products is automatically withdrawn from customer's credit cards at scheduled periods of time. For details on how to use the Subscriptions module, study section [Subscriptions](#) further in this manual.

## Storing Customers' Checking Account Details

```
$store_ch = false;
```

The variable `$store_ch` allows you to define whether you wish to keep your customers' checking account details in the store database or not. Customers provide their checking account details at the checkout. This info includes:

- bank account number;
- bank routing number;
- fraction number.

The two possible values for the `$store_ch` variable are 'true' and 'false'. By default, the variable is set to 'false'. It means that X-Cart does not keep in its database the checking account details that your customers provide when paying for the products with their personal checks.

In this case, the checking account details go directly to the payment gateway which then processes the payment and sends the money to your merchant account. This way of accepting credit card payments online is common practice these days, because it allows you not to pay special attention to the advanced secure environment which is a must when it comes to keeping sensitive data including checking account details. Along with keeping credit card details, keeping checking account details also requires high security level of the environment that is used to operate the store (including servers and local computers) which can hardly be ensured by an individual or a medium-size business. Remember: when keeping checking account details in the store database, any possible vulnerability of the environment may result in data theft and potentially involves legal liability.

However, if your business model supposes keeping checking account details and you have adequate resources to ensure the required security level, you can allow X-Cart to keep this data in its database by changing the value of the variable `$store_ch` to 'true'. Or you can leave the value of the variable as 'false' and consider an alternative way of taking checking account details from your customers.

## Default images

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

The variable `$default_image` allows you to define what image file should be used as the default “No image available” placeholder. A placeholder here means the image that appears in place of any missing image in your store. The default value of the variable is “default\_image.gif”. The image file `default_image.gif` is physically located in the X-Cart root directory.



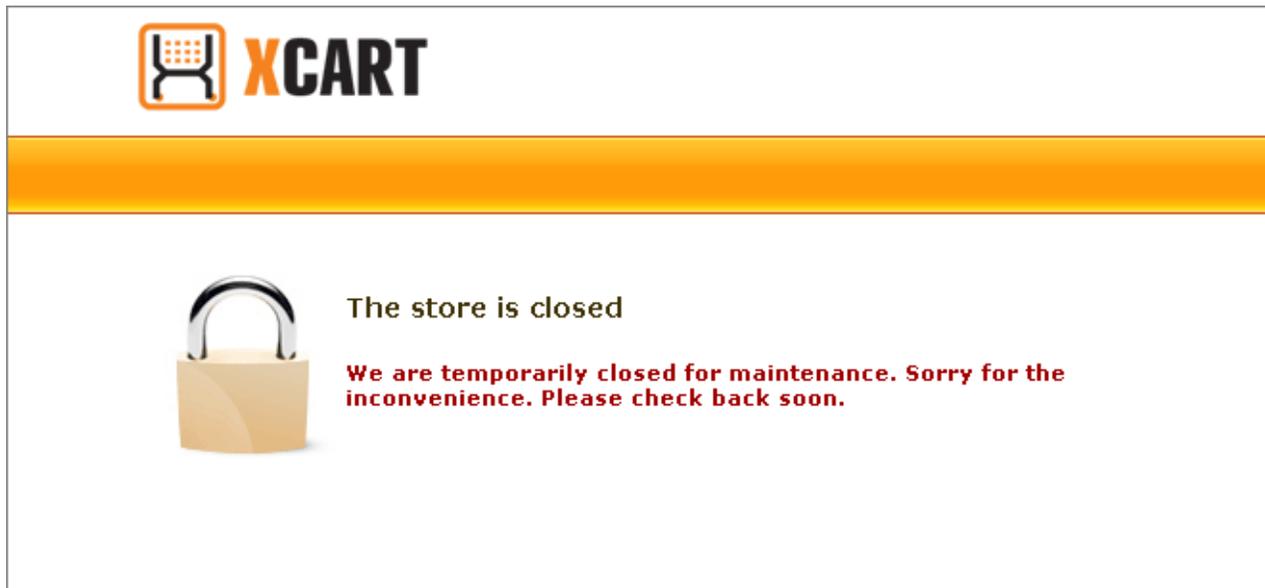
default\_image.gif

If you wish to use a different placeholder image, you can either replace the default image file with a different file having the same name or change the value of the variable `$default_image` and specify the path to the image file and the image filename.

**Note:** You can upload your own image placeholders for missing X-Cart images of different types (product thumbnails, product images, category icons, detailed images, variant images, manufacturer logos, product class images). You can do it through the Images location section of the Admin area.

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

The variable `$shop_closed_file` allows you to define what HTML page should be displayed in place the Customer area when you store is temporally closed for visitors. The default value of this variable is “shop\_closed.html”. The HTML file is physically located in the X-Cart root directory.



shop\_closed.html (fragment)

If you wish to use a different HTML page, you can either replace the default image file with a different file having the same name or change the value of the variable `$shop_closed_file` and specify the path to the HTML page and page filename.

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

```
$single_mode = true;
```

The variable `$single_mode` allows you to enable/disable the Single Store mode if your store is based on X-Cart PRO. The Single Store mode is an operating mode which represents your X-Cart PRO based store as a unified environment shared by multiple providers who can edit the products of other store providers. When the Single Store mode is enabled, shipping rates, discounts and discount coupons, taxes and other settings and components are the same for all the store providers.

The two possible values for the `$single_mode` variable are 'true' and 'false'. Setting the value to 'true' enables the Single Store mode. And setting the value to 'false' restores the normal mode where your store providers can control their products only and can have own shipping rates, discounts, taxes, etc.

**Note:** If your store is based on X-Cart GOLD, the value of `$single_mode` must always be set to 'true'. Changing the value to 'false' will not turn your X-Cart GOLD into X-Cart PRO.

You should only change the value of the `$single_mode` variable **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 settings, these settings will be corrupted.

## FedEx Rates directory

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

The variable `$fedex_default_rates_dir` keeps the location of the directory with files which control correct calculation of the FedEx shipping rates. By default, the value of this variable is set to `'$xcart_dir."/shipping/FedEx/'`, where `$xcart_dir` means the X-Cart root directory.

## Log directory

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

The variable `$log_dir` keeps the the location of the directory with the X-Cart log files. By default, the value of this variable is set to `'/log'`. The `'/'` sign means that the log directory is located inside the X-Cart root directory.

## Cache directory

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

The variable `$data_cache_dir` keeps the location of the directory with the X-Cart cache files. By default, the value of this variable is set to `'/cache'`. The `'/'` sign means that the cache directory is located inside the X-Cart root directory.

## Export directory

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

The variable `$export_dir` keeps the location of the directory to which X-Cart exports CSV files with data. By default, the value of this variable is set to `'$log_dir'` where `$log_dir` means the directory with the X-Cart log files.

## Correcting debug mode

```
$debug_mode = 2;
```

The variable `$debug_mode` allows you to defines the amount of the debugging information which can be displayed on the Customer area. By default, the value of this variable is set to 3. Changing the value to 2 allows you to hide from your store visitors all the debugging information.

## 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 the X-Cart architecture. And tampering with these settings may cause considerable damage to your store.

However, sometimes it may be critical to know what the constants of this section mean.

#### ▪ **USE\_DATA\_CACHE**

This constant defines whether your store should use data caching or not. The two possible values for this constant are 'true' and 'false'. By default, USE\_DATA\_CACHE is set to 'true'. It means that caching is enabled.

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

Changing the value to 'false' is reasonable if only you experience problems in using the store with the enabled caching (e.g. if you keep getting error messages about the files in the /var/cache directory of your X-Cart installation).

#### ▪ **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 area and need to be able to keep working in your store's back end without losing your user session after you open the Customer area 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 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 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 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 key provided with X-Cart tools (For details, see the section ['Re-generate the Blowfish Encryption Key'](#) of this manual).

## 2.3.2 Configuration File top.inc.php

### 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 of your X-Cart. By default, the scripts of X-Cart Customer area are located in X-Cart root directory, the scripts of X-Cart Admin and Provider areas – 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 area. If, for some reason, you want to change the location of your major X-Cart areas, 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 area scripts into X-Cart root directory (`/home/user/public_html/xcart`), so that your customers will be able to access the Customer area 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 area scripts into the directory `/home/user/public_html/xcart/customer`, so that your customers will be able to access the Customer area at `http://www.example.com/xcart/customer`.

## 2.4 Getting Started

After X-Cart has been installed, you can access the main working areas of your store using the following URLs:

**Customer area:** `http://<xcart_http_host>/<xcart_web_dir>/<dir_customer>/`

**Admin area:** `http://<xcart_http_host>/<xcart_web_dir>/<dir_admin>/`

**Provider area (X-Cart PRO):** `http://<xcart_http_host>/<xcart_web_dir>/<dir_provider>/`

where `<xcart_http_host>` and `<xcart_web_dir>` are the values of the `$xcart_http_host` and `$xcart_web_dir` variables from the file `config.php` respectively, and `<dir_admin>`, `<dir_provider>` and `<dir_customer>` are directory location definitions from the file `top.inc.php`.

For example, if the host name of the server where X-Cart is installed is `www.example.com`, X-Cart is installed in the web root, and the directories corresponding to the main working areas of the store are defined as follows:

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

you can access your store's main areas using the following URLs:

Customer area: `http://www.example.com/`

Admin area: `http://www.example.com/admin/`

Provider area: <http://www.example.com/provider/>

For access to X-Cart's back end, a user needs a user account. After installation, your X-Cart based store provides the following default user accounts:

X-Cart GOLD: administrator/provider;

X-Cart PRO: administrator, provider and 'root' provider.

If you installed X-Cart using the script `install.php`, you have been provided with credentials for access to your store's default user accounts at the final step of the installation process.

If you installed X-Cart manually, the credentials for access to the default accounts are the following:

X-Cart GOLD	X-Cart PRO
<b>Administrator/provider account</b> Username: master Password: master	<b>Administrator account</b> Username: admin Password: admin  <b>Provider account</b> Username: provider Password: provider  <b>'Root' provider account</b> Username: root Password: root

Using the default accounts without changing the passwords is not secure, so the first thing you must do after installing your store is log in to each of the default user accounts and change the passwords.

## 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 Admin area ( 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 screenshot shows the X-Cart administration interface. At the top, the X-Cart logo is on the left, and 'admin is logged in! Log out' is on the right. Below the logo, the current language is set to 'English'. The main content area is titled 'Main page :: General settings'. A yellow box highlights the top part of the 'General settings' menu, with arrows pointing to various subsections. Another yellow box highlights the bottom part of the 'General settings' menu, with arrows pointing to various subsections. The left sidebar contains 'Management' and 'Administration' menus. The main content area lists various options under 'In this section:' and 'Modules options:'.

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 administrator 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 area, 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 area (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 area.
- Orders per page (admin): The maximum number of orders which can be displayed on a Search results page in Admin/Provider area.
- Users per page (admin): The maximum number of users which can be displayed on a Search results page in Admin area.
- 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.

Possible values: SKU, Product, Default, Price.

**Note:** The SKU option is only available when the 'Display product code (SKU) in the products list' option is enabled.

Sorting by *SKU* arranges products in a category so their SKU numbers increase towards the page bottom (in 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.

- Display subcategories list in multiple columns: This option allows you to specify how subcategories must be displayed within a category. If this option is enabled, the subcategories are displayed in multiple columns. If this option is disabled, the subcategories are displayed as a list (one below another).
- Show the number of products in categories: If enabled, 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).
- Number of items up to which the Quantity box should be displayed as a selectbox (With larger numbers, the box will appear as an input box): the Quantity box will look as a selectbox

until the number of items in it exceeds the value of this option. For large numbers of items you might want to use an input box, so that customers could enter the quantity manually.

- Enable buttons "Buy Now" and "Add to wish list": If enabled, a 'Buy Now' button (and a 'Add to wish list' button, if the Wish List module is enabled) is added below each product description in the Products list. Customers can use these buttons to add a product to the shopping cart or to the wish list 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 enabled, 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.
- The section 'Send to friend' on the Product details page is enabled: If enabled, 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 enabled, your customers can see the SKU of each product in the Products list.
- Maximum thumbnail width and Maximum thumbnail height: The maximum width and height of thumbnail images of products and categories.
- Maximum product image width and Maximum product image height: The maximum width and height of product images displayed on Product details pages.

### **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 must be 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 enabled, 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 enabled, 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 enabled, 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 enabled, the original language of the store 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 enabled, 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: The name of your store. The value entered into this field replaces the dummy text 'Your Company Name' everywhere in your store: in the 'Shop name' element of the page title in all your store's pages; in the breadcrumb navigation bar (location.tpl), etc. It also appears as the name of your company in order invoices.

**Note:** If you wish, you can use the value of the 'Company name' field only for your order invoices, and specify a different company name for use on the store site. All you need to do is provide a value for the `lbl_site_title` variable in the Administration menu->Languages section. When defined, the value of the `lbl_site_title` variable is used for your site, whereas the value of the 'Company name' field appears only in your store's invoices.

- Company website: The address (URL) of your company website. The value of this field is included into the signature in email notifications.
- Year when the store started its operation: The time since when your company is in business. The value of this field is used as the initial year in all the drop-down boxes used for year selection; for example, in the field for selecting the time period when searching for users or orders, in the field for specifying the validity period for a discount coupon, etc.

#### Company contacts

- Company phone: The phone number which your customers should use to contact your company. The value of this field is displayed in the site header in the Customer area and is included into the signature in email notifications.
- Company phone 2: The alternative phone number. The value of this field is displayed in the site header in the Customer area.

- Company fax: The company fax number. The value of this field is included into the signature in email notifications.

### **Company location address**

The address specified in this section is used for real-time shipping calculation:

- In X-Cart GOLD, this address is used as the origin address for all orders.
  - In X-Cart PRO, this address is used a) as the origin address for the orders shipped from providers that do not have a seller address specified in their user profile; b) as the default origin address when testing the store's ability to receive real-time shipping rates.
- Company address: The street address of your company.
  - Company city: The city where your company is located.
  - Company state: The state where your company is located.
  - Company zip/postal code: The zip/postal code of the area where your company is located.
  - Company country: The country where your company is located.

### **Company e-mails**

X-Cart can track different types of events that occur in your online store and send notifications about these events to the members of your store staff. The 'Company e-mails' section allows you to specify the email addresses to which the notifications will be sent.

By default, all the fields in this section contain the email address that was specified during the X-Cart installation. And all the notifications are sent to this address. If the store staff responsible for processing the notifications consists of more than one person who have separate email addresses, or you simply want to use different email addresses for different types of notifications, you need to readjust the settings in this section.

X-Cart allows you to specify 4 company email addresses:

- Site administrator e-mail address: for notifications about incorrect and potentially unsafe GET and POST requests to the site, SQL and login errors, notifications sent by the built-in [Maintenance Agent](#).
- Users department e-mail address: for notifications about newly created, modified and deleted user profiles.
- Orders department e-mail address: for notifications about placed orders and changed order statuses, product quantity warnings etc.

- Help/Support department e-mail address: for messages submitted through the Contact Us form.

The exact set of notifications that you will receive at the company email addresses can be readjusted in the 'General settings/Email notifications options' section of the Admin area. For details, study section '[Email Notifications Options](#)' of this manual.

### 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 order notifications sent to the store administrator.
- 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
--	--

- 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/mail_header.tpl mail/signature.tpl mail/login_error_subj.tpl	mail/html/login_error.tpl mail/html/mail_header.tpl mail/html/signature.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

Select all the customer notifications which you want to be sent:

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

- 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: This option allows you 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 area 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 page in the Customer area see X-Cart's '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:** This field allows you to enter a key that you or the other store staff will be able to use for access to the Customer area while the store is closed. For example, if your store's Customer area home page URL is `http://example.com/xcart/home.php` and the key is '123', the Customer area can be accessed by pointing the browser to `http://example.com/xcart/home.php?shopkey=123`.

**Important:** For security reasons, the key must never be the same as the master, FTP or MySQL password.

- **If ticked, the categories list always shows root categories:** If selected, root categories are shown in the Categories menu of the Customer area 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.
- **Enable 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:** The 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:** The zip/postal code used as the zip/postal code of the default customer.
- **Default state:** The state used as the state of residence of the default customer.
- **Default city:** The 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).

**Note:** Shipping rate estimates are displayed to anonymous customers only when the 'Fast lane checkout' module is disabled.

### General parameters

- **Primary currency symbol:** The symbol to be used for the primary currency.
- **Primary currency display format:** The location of the primary currency symbol relative to the amount: before the amount, after the amount, with or without a space between the currency symbol and the amount.
- **Alternative currency symbol (empty to disable).** Note that credit card charges are made using primary currency: The symbol to be used for the alternative currency. If specified, all the prices in your store will be displayed twice: first in the currency defined as primary, 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 display format:** The location of the alternative currency symbol relative to the amount: before the amount, after the amount, with or without a space between the currency symbol and the amount.
- **Alternative currency exchange rate:** The conversion rate to be used by X-Cart to convert prices defined in the primary currency to the alternative currency.
- **Weight symbol:** The symbol to be used for units of weight (like *lbs*, *kg*, etc.)
- **Grams in the unit of weight defined by the weight symbol:** The 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.
- Number of days in advance that you want a reminder to be sent to the Orders department e-mail address about an order in Pre-authorized status for which the authorization period is going to expire: This setting allows you 1) to set up X-Cart to send email notifications to your store's Orders department about orders for which the authorization period is going to expire soon and 2) to specify the number of days before the end of the authorization period that you wish such notifications to be sent. If you do not wish notifications of this kind to be sent, set this value to "0" (zero).

## 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 Admin area 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): The HTTPS module that you wish to use for sending HTTPS queries (Net::SSLLeay, 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 Admin area (Administration menu->Summary).

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

- Allow provider users to edit their Seller Address: This option is available only in X-Cart PRO. Using this option, you as a store administrator can allow/forbid your store's providers to access the Seller Address section in their user profile and edit its contents. If this option is enabled, your store's providers will be able to define the address from which their products will be shipped by themselves; they will also be able to edit this address at any time. If this option is disabled, only you (and other store administrators, if any) will be able to define and edit provider seller addresses.
- Key for launch of the cron.php script: This field allows you to set a key that you will use to launch cron.php from the command line. cron.php is X-Cart's script that launches execution of periodic tasks. The key is needed to prevent unauthorized access to this script. The key must be an alphanumeric code no less than 6 characters in length. After the value entered into this field is saved, X-Cart will automatically generate a command that you will be able to use to launch cron.php from the command line. This command will be displayed below the 'Key for launch of the cron.php script' field like the following:

Note: Command for launch of the cron.php script: `php /home/user/public_html/xcart/cron.php --key=XXXXXXXXXXXXXX`

- Run the script that launches execution of periodic tasks once per N user sessions (Set to 0 or leave empty if you do not wish to use this script): This setting allows you to set up X-Cart to automatically launch the script cron.php once per a predetermined number of user sessions (The desired number of user sessions can be entered into this field).

### 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;
- User activity with secured data - this includes the following:
  - password changes (any password changes, including requests for password regeneration using the 'Forgot password' feature);
  - changes of option values in the General settings section, activation and deactivation of modules;
  - decryption of credit card info, including decryption status (successful/failed);
  - removal of credit card info with the 'Remove Credit Card information' tool from the 'Summary/Tools' section;
  - administrators' login/logout, failed login attempts;
  - creation/deletion/editing of administrator and provider profiles.
- Initialization of logs - creation of new log files;
- 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 of payment gateways that occur during online payment transactions;
- Debug messages - debug messages;
- GD extension errors - GDlib function errors and 'function is disabled' messages;
- Online payment checkout processing notices - notices of successful online payment transactions resulting in order statuses changed to 'Processed', 'Pre-authorized' or 'Queued';
- Errors in the decryption of data - details of data decryption failures;
- Benchmark reports - internal benchmark messages;
- XSS injection attempts - details of XSS injection attempts, if any.

**Note:** Every time X-Cart is launched, it checks whether there have been any changes in the X-Cart

environment: PHP settings or PHP extensions. The results of this check are written to the error log, which can become very large, if the environment is changed significantly.

To adjust your store's logging options, do the following:

1. On the 'General settings/Logging options' page, specify what X-Cart must do about each type of events:

The drop-down box opposite each event type provides four options: *do nothing*, *log only*, *email only* and *log and email*. Adjust the values of all the drop-down boxes so they define what action must be performed by the system with regard to each specific event type:

- *do nothing* stands for "do not write information about events of this type to the log file and do not send notifications about such events by email",
- *log only* stands for "write information about events of this type to the log file",
- *email only* stands for "send notifications about events of this type by email",
- *log and email* stands for "write information about events of this type to the log file and send notifications about such events by email".

2. If you have enabled email notifications for any event types, specify the e-mail addresses to which log notifications must be sent:

Into the field 'Notification e-mail addresses (use ',' to separate multiple e-mail addresses)', enter a list of e-mail addresses separated by commas.

3. Click the **Save** button to save the changes.

### 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 the **Save** button.

## 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.
- Enable merchant key based blowfish encryption method: Enabling this option enables Merchant key-based 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.

## PCI DSS compliance options

- Number of failed login attempts after which a user account must be suspended: The number of login attempts that a user is allowed to make using an incorrect password before X-Cart automatically suspends their account. For compliance with PCI Data Security Standard, set this value to 6.
- Lockout duration in minutes (Leave empty if you do not want to automatically re-enable automatically suspended users): The time period for which a user must remain suspended after having been automatically suspended by the system after a number of failed login attempts. For compliance with PCI Data Security Standard, set this value to 30 minutes or leave the field empty.
- Number of days of inactivity after which an administrator account must be suspended (Set to 0 or leave empty if you do not wish to suspend unused administrator accounts): The number of days that an administrator account may remain inactive before getting automatically suspended by X-Cart. For compliance with PCI Data Security Standard, set this value to 90 days.
- Use password strength check: This option allows you to enable password strength check for passwords created by the users of your store. If this option is enabled, every time a user creates a new password for their account, X-Cart will perform a check to ensure that this password contains both numeric and alphabetic symbols and is no less than 7 symbols in length. If this option is disabled, no such check will be performed. For compliance with PCI Data Security Standard, enable this option.
- Number of days after which non-customer users must be requested to change their password: The number of days since the user's most recent login after which X-Cart must request the user to change their password. This setting is relevant only for non-customer users (administrators, providers). For compliance with PCI Data Security Standard, set this value to 90 days.
- Do not allow a user to submit a new password that is the same as any of the last four passwords they have used: This option helps you ensure that users who are requested to change their password will change their password to something new (not a password they have already used). For compliance with PCI Data Security Standard, enable this option.

## 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 provides a set of options that you can use to optimize your store site for search engines.

### Note on the usage of clean URLs

This section of the 'General settings/SEO options' page offers a brief explanation of Clean URLs and provides instructions on how this functionality can be enabled in your store.

### Clean URL options

- Enable Clean URLs (requires Apache web server with mod\_rewrite module enabled): This option enables the Clean URLs functionality at your store. **Important:** Additional steps are required; for details, see the Note on the usage of clean URLs on the 'General settings/SEO options' page.
- Maximum number of URLs that can be stored in the Clean URLs history for one page: The maximum number of previously entered clean URL values that your store must be able to keep for any object (product, category, manufacturer or embedded static page). When the Clean URL history of an object contains the number of clean URL values specified by this option, saving another clean URL value to the Clean URL history of this object removes from the history the clean URL value that was added earliest. If you do not wish to limit the number of clean URL values that can be stored, leave this field empty or set its value to '0' (zero).
- Redirect dynamic PHP URLs to the corresponding Clean URLs: This option allows you to specify whether a visitor who requests a page in your store using a dynamic URL must be redirected to the clean URL of that page. If this option is enabled, the visitor will be redirected to the clean URL of that page with the "HTTP/1.1 301 Moved Permanently" HTTP status code. If this option is disabled, the dynamic page will be served (no redirection will occur).
- Clean URL extension for category pages: The extension to be used for the clean URLs of all your

store's category pages.

- Clean URL extension for product pages: The extension to be used for the clean URLs of all your store's product pages.
- Clean URL extension for manufacturer pages: The extension to be used for the clean URLs of all your store's manufacturer pages.
- Clean URL extension for static pages: The extension to be used for the clean URLs of all your store's embedded static pages.

### General options

- Site META description: The description to be used in the description meta tag of pages that do not have a meta description of their own and are not using any other meta description (Maximum 500 characters).
- Site META keywords: The keywords to be used in the keywords meta tag of pages that do not have meta keywords of their own and are not using any other meta keywords (Maximum 500 characters).
- Page title format: The format of page titles to be used for all the pages in your store.
- Maximum length of page title element (leave 0 or empty if not applicable): The maximum number of characters to be displayed 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.

- Use product dimensions for shipping rates calculation: This setting allows you to specify whether you wish product dimensions to be used for shipping rates calculation. If this option is enabled, calculation of shipping rates will be performed with the consideration of product dimensions, not just weight. If this option is disabled, the calculation of shipping rates will be performed based on product weight only; product dimensions will be ignored.

**Note:** The option 'Use product dimensions for shipping rates calculation' is relevant only for real-time shipping calculation.

### Real-time shipping options

- Enable real-time shipping calculation: If selected, your customers will see an estimation of shipping cost for orders before they are placed. These shipping rates will be received directly from the shipping carriers. Consult the ['Real-time Shipping Calculators'](#) section for more information.

**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 service: 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.

### Dimensions of the shipping box for small items (for real-time shipping)

This section allows you to set the length, width and height of the shipping box that you will use to ship orders containing only small items (Small items are products for which the option 'Use the dimensions of this product for shipping cost calculation' on the 'Product details' page is disabled).

**Note:** The settings in this section need to be adjusted only if the options 'Enable real-time shipping calculation' and 'Use product dimensions for shipping rates calculation' are enabled in your store.

### Intershipper account details

This section allows you to provide your InterShipper account details.

### U.S.P.S account details

This section allows you to provide your U.S.P.S. account details.

### CanadaPost account details

This section allows you to provide your CanadaPost account details.

### DHL/Airborne account details

This section allows you to provide your DHL/Airborne account details.

### FedEx options

This section allows you to provide your FedEx account details.

### 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 section [User Access Control](#) to find out how you can forbid access to your store's back end from unauthorized IP addresses.
- Study the section [Blowfish](#) to learn how you can protect order information in your store.
- See the section [PGP/GnuPG](#) for information on using PGP encryption for X-Cart's email notifications.

- Refer to the section [3-D Secure Payment Authentication](#) to find out how you can enable support for *Verified by Visa* and *MasterCard SecureCode* programs in your store.
- Study the section [Using Active Content \(X-Cart PRO\)](#) to find out how you can grant "trusted" status to specific providers in X-Cart PRO so they can use active content.

## 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 area 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 area, 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 area.

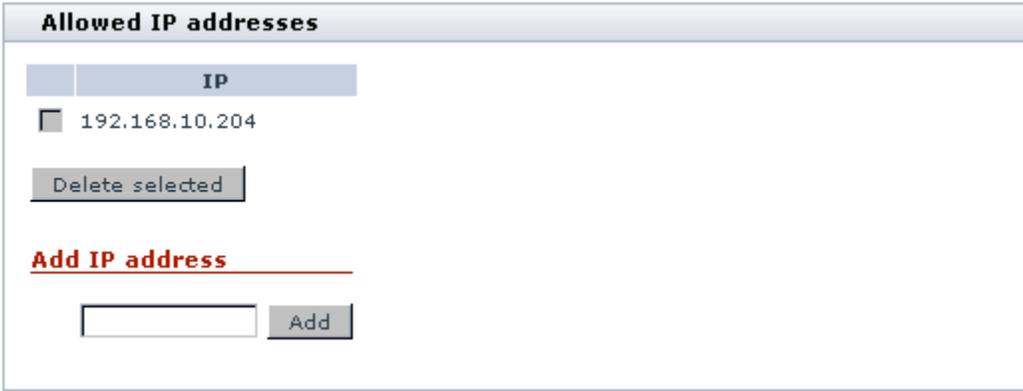
## Managing your store's list of allowed IP addresses

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 Admin area.

To view your store's list of IP addresses:

1. Go to the 'Summary' section (Administration menu->Summary).
2. In the section menu, click the 'User access control' link. 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:



The screenshot shows a window titled "Allowed IP addresses". At the top, there is a header bar with the title. Below it is a table with one column labeled "IP". The table contains one row with the IP address "192.168.10.204". To the left of the IP address is a small square checkbox. Below the table is a button labeled "Delete selected". Underneath this is a section titled "Add IP address" in red text, underlined. Below this section is a text input field and a button labeled "Add".

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.

IP
<input type="checkbox"/> 192.168.10.83

Register selected      Delete selected

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, this algorithm provides two levels of data encryption:

1. Blowfish key-based encryption (used for order details, user passwords and some internal data);
2. Merchant key-based encryption (used for order details).

Blowfish key-based encryption is used by default, whereas Merchant key-based encryption can be enabled at your wish to ensure a still higher level of security for your customers' data.

### Blowfish key-based encryption

During installation, X-Cart generates a secret key to help you ensure store security - *Blowfish key*. This key gets written to X-Cart's config.php file as the value of the \$blowfish\_key variable, and, immediately after this key is generated, X-Cart begins using this key to encrypt user passwords, order details (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 a malicious user gains access to your database - provided this user did not get access to the file config.php of your X-Cart installation and your Blowfish key has not been compromised.

### Changing your 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, see the section [X-Cart's Advanced Tools](#) in the 'Maintaining Your Store' section of this manual).

Never try to change your Blowfish 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. Editing \$blowfish\_key manually will corrupt all the user passwords, including the administrator 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.

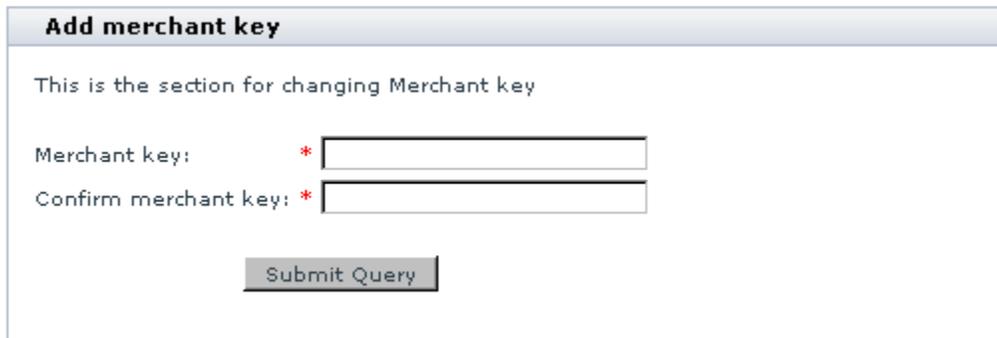
### Merchant key-based encryption

Blowfish data encryption based on using a Merchant key is still more secure than Blowfish key-based 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 your store's database. If the signatures are deemed to be identical, you will be allowed to access the details of any orders during the current administrator session.

### Enabling Merchant key-based encryption

To enable Merchant key-based Blowfish encryption in your store, do the following:

1. In the 'General Settings/Security options' section of your store's Admin area, enable the option 'Enable merchant key based blowfish encryption method'. A page titled 'Add merchant key' opens. This page provides a form for creating a Merchant key:



**Add merchant key**

This is the section for changing Merchant key

Merchant key: \*

Confirm merchant key: \*

2. Think of a password that you would like to use for access to order details in your store and enter it into the 'Merchant key' field of the 'Add merchant key' form. Make sure this password is at least 6 characters long.
3. Enter the password once again into the 'Confirm merchant key' field.
4. Click the **Submit Query** button.

After you click on **Submit Query**, Merchant key-based Blowfish encryption is enabled in your store. Any data which has been encrypted by this time using the hard-coded Blowfish key from config.php is decrypted and re-encrypted using the Merchant key you provided. On completion, a message is displayed confirming that the order details have been successfully re-encrypted with the Merchant key.

### 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 will not be displayed 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 Blowfish encryption key stored in the variable `$blowfish_key` in `config.php`. After you enter your Merchant key into the system, the new orders accumulated by this time will be decrypted and re-encrypted using the Merchant key.

Using the 'Enter merchant key' form in the Admin area is not the only way of providing your Merchant key to the system. You can initiate re-encrypting of order details remotely by entering the following line into the address bar of your web browser:

```
http://www.example.com/xcart/admin/post_recrypt.php?merchant_password=12345
```

replacing `http://www.example.com/xcart/` with the actual address of your store and `12345` with your actual Merchant key.

Alternatively, you can use the command line:

```
/usr/bin/php {xcart_root_dir}/admin/post_recrypt.php merchant_password=12345
```

(`{xcart_root_dir}` must be replaced by your X-Cart root directory and `12345` with your Merchant key).

### Changing your Merchant key

It is possible to change a previously created Merchant key, but before you are allowed to create a new Merchant key, you will need to disable the 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 area.

To disable Merchant key-based Blowfish encryption, do the following:

1. Go to the 'General Settings/Security options' section of the Admin area.

If you have already entered your Merchant key in the current session, the option 'Enable merchant key based blowfish encryption method' will look as follows:

Check if payment gateway response is coming from the IP's specified here (enter a comma separated list)	<input type="text"/>
Enable merchant key based blowfish encryption method	<input type="checkbox"/> <a href="#">Need help?</a>
Check MD5 of compiled templates for better store protection at a shared hosting	<input checked="" type="checkbox"/>

This means you can proceed to step 2.

If you have not yet entered your Merchant key in the current session, the option 'Enable merchant key based blowfish encryption method' will look as follows:

Check if payment gateway response is coming from the IP's specified here (enter a comma separated list)	<input type="text"/>
Enable merchant key based blowfish encryption method	Enabled
<b>The option cannot be disabled without first entering a valid Merchant key on the Order details page.</b>	
Check MD5 of compiled templates for better store protection at a shared hosting	<input checked="" type="checkbox"/>

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 'Enable merchant key based blowfish encryption method'. Proceed to step 2.

2. Unselect the 'Enable merchant key based blowfish encryption method' check box.
3. Click the **Save** button.

When you click on **Save**, Merchant key-based Blowfish encryption is 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+obtB1KQpwXuxwgiLak6wPLrn6FPWoNL2Yw8ZxMz862Nc4HinZtACKw+AT0dhIU
IFsL38LifAu5iC7dkSGe5D80tgrV1VEx9D6LOiw64QgA2NgUUgEQeuoB4xR2x7Za
2hz5AUyOu15fqyV01veg7EUFohGa4hHxjxegUrSkCPRk4mpIEZJ9gh7j+h+o8otA
+9Z3YzEsrQbdJKeuK/SH8he6qjohO9KzpEhqomVcrgwR6+AhpjXNpdcl8xKVOevn
Phwed7oFSyJCRih2Q3EwJMd7rB+vaAWtLgeG9jgS5njld3QdfcvL8dDGXW6HjrV
Og3LjH7N2I/2p70AFhMJYNBedqvymRBb5SKu7DRjwzt4pAuh3ebEZYdqqWxWoW8A
FSKN4qsT0sHkoEbWgF9JpBB9SUKqJ/okuyrtOzaNmcTstM7T4L81j01WjANbaDEr
JtJLASoyjVvmyxyEtr6dWaBIA5rdL4MypQWEDhUkRuaCwh567GMyq4/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)
  (2) DSA (sign only)
  (5) RSA (sign only)
Your selection? 1
DSA keypair will have 1024 bits.
ELG-E keys may be between 1024 and 4096 bits long.
What keysize do you want? (2048)
Requested keysize is 2048 bits
Please specify how long the key should be valid.
    0 = key does not expire
    <n> = key expires in n days
    <n>w = key expires in n weeks
    <n>m = key expires in n months
    <n>y = key expires in n years
Key is valid for? (0) 1m
Key expires at Fri Jun 10 14:39:04 2005 MSD
Is this correct? (y/N) y

You need a user ID to identify your key; the software constructs the user ID from
Real Name, Comment and Email Address in this form:
```



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)

mQGibEKB4RMRBADEAlmSy+zABeoW+jF5hHdhfQpEP3YTkvkWO78a/EGpIoEnL8Ck
WUcADwRlilRr0BDNuamfpFwNPU58dlvFLPXn14FHJ0rfa8eIty50eV6puA61oANn
XNaoJ2cAaxC6cYC+N7PDkTbnRbMZArc3p9T6gKJeGyc1Ty1dhUS7JJ/G/wCg27fn
FYWlMAF9yT8EhMk7p5oa6k8D/j8T8YahBrXSZouahp8VsmCr8/TTYfoVTTcCFW6a
1ECgv4M1Eslh9pTAmIzxmu4yGLzU9EOovi3511OLOxoq6GhpR9n+VKzB2qUxWdqv
LJpXYty+DjtI7o9OIh9w0bDkkVgmblyJIRF0gMk3nluYYiqrd8udkYOYfGJeSnf+
MB0rBACc7Q4LrCdElee3/ZI7uDugYcgNyPRwtb/IGzY0VNF+1tkYxwHOIy7yJUuM
a8CngJQlMc9xjX3jSyOeFjIj8ldmLWh5TIqEZGOQP7RYfO8XtJyZRIWgl2sRSq0a
yTZW+oRLL6QLjMDQTVy4YrMA5eGFmGx9C8sxPhQPASNq1Bu+hLQjSm9obiBTbWl0
aCA8am9obi5zbWl0aEBleGFtcGxllmNvbT6IZAQTQIAJAUCQoHhEwIbAwUJACeN
AAYLCQgHAWIDFQIDAyYCAQIeAQIXgAAKCRCFPQd8/ueYgTXHAJ0Y33tia6tnUHpm
o/qhRalpXm+5/wCfrpxiQ1SI8FQYotJP4ZNtlh5ESha5Ag0EQoHhGRAIAON902gU
dsodYnV+nVZQdwtqNiDfifOpNP+gGHQsYzH5cu0YC3mxFGjZK2s3/0GPq9+5AYW
lkkYlvompmKTF8rYXT7vnSizFiUSf4V+63XzSxnY3NexIyjj94Lvpz66SOJXq3
K3P/jaxllb8tQxKU/gl0HuynKlRI1YuEXIDx4xfXqtnFHbF+a+GqERz9MlCpq3Zt
lHq/4becsx9zfWVxsduzRn/3J+bRLmXYOCQNM0m9kNmzH8RMyZ96q4J5Q8+b+GDO
V0swG3xcy3OZpTwtqPQ84LmqcCmMVUfi7tN1EH++J+ClnCx2u6eOb/2kPUON03BP
WHfwANCn+LniEb8AAwUIAM64Cx2ryhHt jJtizFAsU3V4tH256cHdPaijSRoNcy9L
YJinDgDl90CEvcF9ME7E3Ly6+aWBBcCw3ghXQQUF0/Xc7DNlhvcWN5dDWf4lPt2Z
Xo/dYjwHjD+PaOQoxeZ6SDmXWxGwoF83yglDVVX9b8gaHW0GI588v+62h0RVKrIa
caivXdDTqh80lh8N9CVGoIFS3uA8nRxDG1jjWawcHdN14wyRqdXlz+a4/RK+ZlUx
oJ2dIQokiQEEhohMzmvd/lXXjCzKnQjPES5HUTgI/3HmgCyAM7tAzcuJccAI3iHw
```

```
nM1m9m+mEQW1IX6zi1lOo/IsV2GOJ/EJlhDjRD2yyX6ITwQYEQIADwUCQoHhGQIb
DAUJACeNAAAKCRCFPQd8/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, some of which are:

- 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.

- Sage Pay 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:

To ensure the security of your transactions, we're proud to partner with these programs:



learn more



learn more

After you click the "Submit" button, your transaction will be processed. For your security, Verified by Visa may ask you for information on the next page.

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 Using Active Content (X-Cart PRO)

A provider can use active content (that is unfiltered HTML and Javascript in product descriptions and extra field values and validation Javascript in Product Options).

When the 'Allow this provider to use active content on product pages' option on the provider profile page in the admin section is enabled, this provider becomes trusted and can use active content without any validation.

When this option is disabled, the provider is 'untrusted'. When such a provider imports or updates data, the following data from this provider will be filtered to exclude the possibility of an XSS attack:

- product descriptions (including international descriptions);
- extra fields values.
- Product Configurator data
- manufacturers data
- special offer promo texts

When an untrusted provider imports data, all the HTML tags are excluded.

A validation Javascript field for Product Options is not displayed to untrusted providers.

In case the data have already been entered or modified by the admin, and the option 'Allow this provider to use active content on product pages' is disabled (the provider becomes untrusted), data/values of the fields defined above will be filtered before being displayed in the customer area.

Validations Javascript code for Product Options will be ignored.

**Important!** Enabling/disabling the 'Allow this provider to use active content on product pages' option does not change the data in the products of the providers. Only the provider profile is changed.

## 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 Admin area (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  
 Asia    Africa    Antarctica

Check all / Uncheck all

CODE	COUNTRY	HAS STATES	ACTIVE
CA	<input type="text" value="Canada"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
GL	<input type="text" value="Greenland"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PM	<input type="text" value="St. Pierre and Miquelon"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>US</b>	<input type="text" value="United States"/>	<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. If you disable the check box for such countries after destination zones have been defined, the zones, which include this country, will be confused and shipping rates might be calculated incorrectly.  
 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 the **Change** button.

3. Use the language selector to switch the current language of the Admin area 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

For each of your store's 'active' countries that needs states, you must create a state list. State lists can be created and managed using the 'States Management' section of the Admin area (Management menu->States).

During X-Cart installation, you can import pre-configured state lists for some countries (For information about importing states, see the chapter [Installing X-Cart](#)). If, during X-Cart installation, you imported states for your 'active' countries, you can view the respective state lists in the 'States Management' section: simply click on a country name link at the top of the 'States' dialog box, and the state list for the selected country will be displayed below:

### States

[Australia](#)   [Austria](#)   [Belgium](#)   **Canada**   [France](#)   [Germany](#)   [Italy](#)  
[Luxembourg](#)   [Netherlands](#)   [Spain](#)   [United Kingdom \(Great Britain\)](#)   [United States](#)

[Check all](#) / [Uncheck all](#)

	Code	State	Counties
<b>Canada</b>			
<input type="checkbox"/>	AB	Alberta	<a href="#">n/a</a>
<input type="checkbox"/>	BC	British Columbia	<a href="#">n/a</a>
<input type="checkbox"/>	MB	Manitoba	<a href="#">n/a</a>
<input type="checkbox"/>	NB	New Brunswick	<a href="#">n/a</a>
<input type="checkbox"/>	NF	Newfoundland/Labrador	<a href="#">n/a</a>
<input type="checkbox"/>	NT	Northwest Territories	<a href="#">n/a</a>
<input type="checkbox"/>	NS	Nova Scotia	<a href="#">n/a</a>
<input type="checkbox"/>	NU	Nunavut	<a href="#">n/a</a>
<input type="checkbox"/>	SK	Saskatchewan	<a href="#">n/a</a>
<input type="checkbox"/>	YT	Yukon	<a href="#">n/a</a>

**Add new state**

Code	State	Country
<input style="width: 50px;" type="text"/>	<input style="width: 90%; border: none;" type="text"/>	Canada <input style="width: 50px;" type="text"/>

By looking at a state list, you can find out the following information for each state:

- **CODE:** The state code (must be unique on a per-country basis). State codes are used for X-Cart's inner processes and also appear in customer addresses on the invoice.
- **STATE:** The state name.
- **COUNTIES:** The number of counties in the state ('n/a' is displayed if no counties are defined).

**Note:** COUNTIES column is displayed only when use of counties in the store is enabled. To enable use of counties, enable the option 'Use counties' in General settings->General options.

**Important:** We cannot guarantee that X-Cart's pre-configured state lists are complete or correct. For example, we haven't been able to find a standard list of counties for the United Kingdom, so the list of UK counties shipped with X-Cart provides a combination of lists from [http://www.gbet.com/AtoZ\\_counties/](http://www.gbet.com/AtoZ_counties/) and <http://www.ons.gov.uk/about-statistics/geography/products/geog-products-area/names-codes/eurostat/index.html> with some corrections added by our clients residing in the UK. Before you use X-Cart's pre-configured state lists in your live store, please ensure they are adequate. You can edit any existing state list by adding, removing or editing the states contained in them as described below.

## 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.

### Multilanguage state names

Multilanguage state names are currently not implemented in X-Cart.

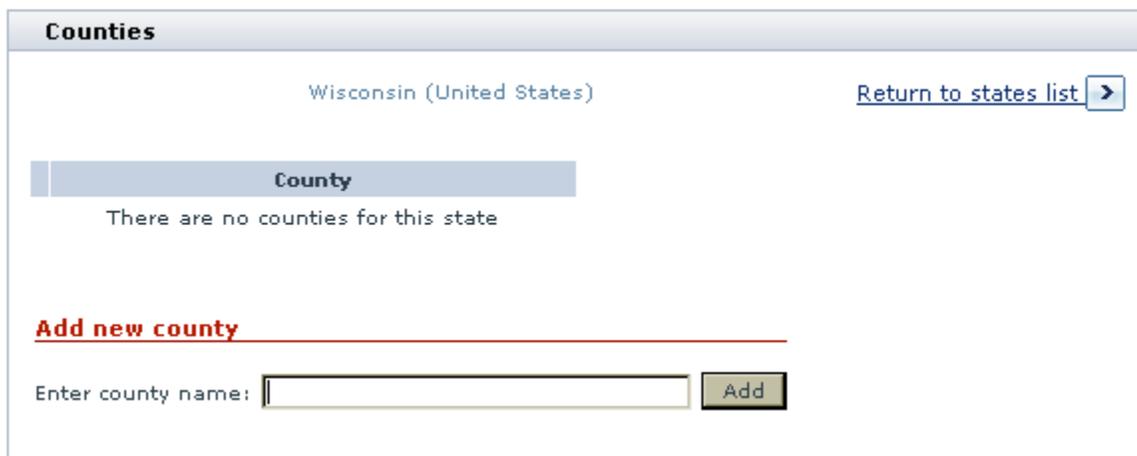
## 3.3.3 Counties

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 Admin area. 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 on 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
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](#)

	County
<input type="checkbox"/>	Adams
<input type="checkbox"/>	Ashland
<input type="checkbox"/>	Bayfield

Add new county

---

Enter county name:

## Adding counties

To add a county for a state:

1. Open the 'Counties Management' section (Click on 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 on 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 on 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 destination 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 on 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.

- Destination zones must not intersect. The territories, already included into one of the destination zones, must not be included into another destination zone.

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 the '[North America](#)' link).

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 destination 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 the **Update** button.
  - 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 the **Save zone details** button 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 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 can be set up to calculate the cost of shipping for products being ordered by customers.

By default, shipping calculation in your store is disabled. If you wish to provide shipping cost calculation to your customers, you must enable this functionality. This can be done by disabling the option **DISABLE SHIPPING** in the 'General settings/Shipping options' section of the store's Admin area.

After you enable shipping cost calculation, you will need to set up the shipping methods that your store will use to deliver orders to customers. You can either define your own shipping methods or use the pre-defined shipping methods provided by such popular carriers as USPS, UPS, FedEx, DHL/Airborne, Canada Post and Australia Post.

If you decide to define and use your own shipping methods, the shipping rates for these methods will need to be entered into X-Cart manually.

If you decide to use the shipping methods provided by the carrier companies like USPS, UPS, FedEx, etc, the shipping rates for these methods will need to be obtained from the respective carrier companies. These rates will need to be entered into X-Cart manually or to be obtained in real time from the online shipping calculators provided by the respective carrier companies or InterShipper service.

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.

No shipping calculation

DISABLE SHIPPING (General settings/Shipping options) = on

Real-time shipping calculation

1. DISABLE SHIPPING (General settings/Shipping options) = off
2. Enable real-time shipping calculation (General settings/Shipping options) = on
3. Activate the real-time shipping methods that you wish to use:
  - a) Go to the 'Shipping methods' section.
  - b) In the 'Real-time calculated shipping methods' subsection of the 'Shipping methods' dialog box,

enable the 'Active' check boxes opposite the methods you wish to use).

c) Click the **Update** button.

4. Enable your store to use real-time shipping cost calculators

Non-real time shipping calculation

1. DISABLE SHIPPING (General settings/Shipping options) = off

2. Enable real-time shipping calculation (General settings/Shipping options) = off

## Roles in shipping settings management

If you are an X-Cart GOLD administrator/provider:

- You can define the shipping methods that will be used by your store. The methods can be real-time and non-real time (See the chapter [Shipping Methods](#)).
- If you decide to use 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 decide to use non-real time shipping methods, you can adjust shipping rates for them (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 the shipping methods that will be used by your store. The methods can be real-time and non-real time (See the chapter [Shipping Methods](#)).
- If you decide to use 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:

- You can adjust shipping rates for non-real time shipping methods (See the chapter [Shipping Charges](#)).
- You can adjust markups for real-time shipping methods (See the chapter [Shipping Markups](#)).

### 3.4.1 Shipping Methods

X-Cart allows you to define the shipping methods by which your store will ship ordered products to customers. You can define your store's shipping methods using the 'Shipping Methods' section of the Admin area (Management menu->Shipping methods). The 'Shipping Methods' section provides a

dialog box titled 'Edit shipping methods':

### Shipping methods

**Real-time calculated shipping methods**

[Expand all](#) / [Collapse all](#)

+ <a href="#">Australia Post</a>	7 active method(s) out of 7	<a href="#">Options &gt;&gt;</a>
+ <a href="#">DHL/Airborne</a>	7 active method(s) out of 7	<a href="#">Options &gt;&gt;</a>
+ <a href="#">Canada Post</a>	24 active method(s) out of 24	<a href="#">Options &gt;&gt;</a>
+ <a href="#">DHL</a>	0 active method(s) out of 1	
+ <a href="#">FedEx</a>	20 active method(s) out of 20	<a href="#">Options &gt;&gt;</a>
+ <a href="#">UPS</a>	32 active method(s) out of 32	
+ <a href="#">U.S.P.S.</a>	33 active method(s) out of 33	<a href="#">Options &gt;&gt;</a>

**Defined shipping methods**

Shipping method	Delivery time	Destination	Weight limit (lbs)	Pos.	Active	COD
-----------------	---------------	-------------	--------------------	------	--------	-----

**Add shipping method**

-

**Note:** If you do not see the 'Edit shipping methods' dialog box in the 'Shipping methods' section, this means that shipping is disabled in your store. To be able to define shipping methods, you will need to go to the General settings->Shipping options section and activate shipping by unselecting the 'Disable shipping' check box.

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 area. 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 (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).

**Note:** The weight limit settings limit not the total order weight, but the weight of one shipping package. All orders above the weight limit will be split into several packages so that the weight of each package is below the limit. X-Cart calculates shipping charges for each package and then adds them together to get the total order shipping cost.

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 the **Update** button. 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 the **Update** button.

### 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 the **Update** button.

### **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 the **Update** button.

#### **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 the **Update** button.

**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 [Server Requirements](#) in 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 Admin area, go to the 'General settings->Shipping options' section.
  - b) On the 'General settings->Shipping options' page, select the check boxes 'Enable real-time shipping calculation' and 'Use Intershipper calculation service'.
  - 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 Admin area (Management menu->Shipping methods).
  - b) In the section menu, click the 'Real-time processors options' link. A dialog box titled 'InterShipper options' opens.

**InterShipper options**

[Manage shipping methods](#)

**Type of delivery:**

**Type of pickup:**

**Package type:**

**Nature of Shipment Contents:**

**Package COD Value in cents:**

**Optional services:**

Additional Handling

Saturday Delivery

Proof of Delivery

**Maximum package weight (lbs)\*:**  (Should not exceed 150 lbs)

**Maximum package dimensions (inches)\*:**

Length	x	Width	x	Height
0		0		0

**Always use the same package dimensions as specified in the "Maximum package dimensions" fields:**

\* The settings "Maximum package weight" and "Maximum package dimensions" define the maximum weight and size of the shipping package that you do not wish to be exceeded when products are shipped to customers. If the total weight and/or volume of the products ordered by a customer exceed the limitations defined by these settings, the shipment is split into several packages. Please note that the maximum package weight and maximum package dimensions that you set on this page must not exceed the actual limitations imposed by InterShipper (currently 150 lbs). If you set the maximum package weight to zero, X-Cart will consider the maximum package weight for your store equal to the maximum weight limit for packages established by InterShipper. If you set any of the maximum package dimension values to zero, X-Cart will treat the respective package dimension as unlimited. Although you may use unlimited dimensions for your packages, doing so is not recommended, because in this case X-Cart may form so large a package that it will not be accepted by InterShipper.

c) Adjust the settings provided in the 'InterShipper options' dialog box according to your preferences.

d) Click the **Apply** button.

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/registration/>).

You will receive an e-mail with your username, password and the test server name. Reply to the e-mail you received and tell them that you would like to be moved to the production server because you are using X-Cart and that it doesn't work with the test server. You may get a response asking which API you are using. Tell them you are using the Rates Calculator.

You will receive another e-mail with the production server name, which is also not completely correct, so don't enter that in X-Cart either.

3. Enable your store to use the real-time shipping calculator provided by USPS:

- a) In your store's Admin area, go to the 'General settings->Shipping options' section.

- b) On the 'General settings->Shipping options' page, select the check box 'Enable real-time shipping calculation'. Unselect the check box 'Use Intershipper calculation service'.

- c) Use the 'U.S.P.S account details' subsection of 'General settings->Shipping options' page to provide the required information.

- USPS Server name: production.shippingapis.com
- Web Tools User ID: the name you were sent in the e-mail

- d) Click **Save**.

4. Adjust USPS options:

- a) Go to the 'Shipping methods' section of your store's Admin area (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):

Maximum package weight (lbs)\*:

Maximum package dimensions (inches)\*: Length  x Width  x Height

Always use the same package dimensions as specified in the "Maximum package dimensions" fields:

Girth (required for non-rectangular Priority Mail large pieces) (inches):

First Class Mail Type:

\* The settings "Maximum package weight" and "Maximum package dimensions" define the maximum weight and size of the shipping package that you do not wish to be exceeded when products are shipped to customers. If the total weight and/or volume of the products ordered by a customer exceed the limitations defined by these settings, the shipment is split into several packages.  
Please note that the maximum package weight and maximum package dimensions that you set on this page must not exceed the actual limitations imposed by USPS service. If you set the maximum package weight or any of the maximum package dimension values to zero, X-Cart will use the default limitations established by USPS.

- c) Adjust the options according to your preferences.
- d) Click the **Apply** button.

**Note:** Since USPS bases their rates on weight, make sure you have a weight assigned to all of your products. It defaults to lbs, so if you are using ounces be sure to change the conversion in General Settings.

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 Admin area, go to the 'General settings->Shipping options' section.
  - b) On the 'General settings->Shipping options' page, select the check box 'Enable real-time shipping calculation'. Unselect the check box 'Use Intershipper calculation service'.
  - 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 Admin area (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>	<input type="text" value="Package"/>
<b>Ship in a specified number of days:</b>	<input type="text" value="1"/>
<b>Additional protection type:</b>	<input type="text" value="Not required"/>
<b>Additional protection value in \$:</b>	<input type="text" value="0"/>
<b>Hazardous Materials:</b>	<input type="checkbox"/>
<b>COD payment:</b>	<input type="text" value="Cashier's Check or Money Order"/>
<b>COD value in \$:</b>	<input type="text" value="0"/>
<b>Allow customers to provide their own DHL/ Airborne account at checkout:</b>	<input type="checkbox"/>
<b>Maximum package weight (lbs)*:</b>	<input type="text" value="0"/> (Should not exceed 149 lbs)
<b>Maximum package dimensions (inches)*:</b>	Length <input type="text" value="0"/> x Width <input type="text" value="0"/> x Height <input type="text" value="0"/>
<b>Always use the same package dimensions as specified in the "Maximum package dimensions" fields:</b>	<input type="checkbox"/>

\* The setting "Maximum package weight" defines the maximum weight of the shipping package that you do not wish to be exceeded when products are shipped to customers. Please note that the maximum package weight that you set on this page must not exceed the actual limitations imposed by DHL/Airbone service. If you set the maximum package weight to zero (recommended value), X-Cart will consider the maximum package weight for your store equal to the maximum weight limit for packages established by DHL/Airbone (currently 149 lbs).

c) Adjust the options according to your preferences.

d) Click the **Apply** button.

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

To use FedEx real-time shipping cost calculation, you must complete end-user certification with FedEx.

#### Setting up shipping cost calculation for FedEx

To set up shipping cost calculation for FedEx, 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 Admin area, go to the 'General settings->Shipping options' section.
  - b) On the 'General settings->Shipping options' page, select the check box 'Enable real-time shipping calculation'. Unselect the check box 'Use Intershipper calculation service'.
  - c) Use the 'FedEx account details' subsection of 'General settings->Shipping options' page to provide your FedEx account information.
  - d) Obtain a *meter number* from FedEx:

Go to the 'Shipping methods' section of your store's Admin area (Management menu->Shipping methods). Find FedEx in the list of real-time shipping methods and click the Options >> link opposite it. A dialog box titled 'FedEx options' opens:

### FedEx options

[FedEx shipping methods](#)

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="New York"/>
<b>Postal code:</b>	*	<input type="text" value="10001"/>
<b>Country:</b>	*	<input type="text" value="United States"/>

The 'FedEx options' dialog box provides a form that you must complete to obtain a meter number. Be sure to complete all the required fields, then click the **Get the FedEx meter number** button.

After you click on **Get the FedEx meter number**, X-Cart software will connect to FedEx and request a meter number for your account. As soon as the meter number is obtained, the contents of the 'FedEx options' dialog box will be reloaded and you will see a form like the following (Note that your meter number will be displayed at its top):

### FedEx options

[FedEx shipping methods](#)

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:** xxxxxxxx

Clear the FedEx meter number

Specify the options that will be used for getting shipping rates from FedEx:

<b>Carrier type:</b>	<input type="text" value="FedEx Express"/>
<b>Packaging (FedEx Express):</b>	<input type="text" value="FedEx Envelope"/>
<b>Packaging (FedEx Ground):</b>	<input type="text" value="FedEx Envelope"/>
<b>Dropoff type:</b>	<input type="text" value="Regular pickup"/>
<b>Ship date (days):</b>	<input type="text" value="0"/>
<b>Currency code:</b>	<input type="text" value="USD"/>

---

**Package limits**

The settings "Maximum package weight" and "Maximum package dimensions" define the maximum weight and

---

**Dangerous Goods/Accessibility:**

**Signature option:**

<input type="checkbox"/> Shipment contains alcohol	<input type="checkbox"/> Shipment is Hold at Location
<input type="checkbox"/> Shipment contains dry ice	<input type="checkbox"/> Nonstandard container is used for a shipment
<input type="checkbox"/> Shipment is Inside Pickup	<input type="checkbox"/> Shipment is Inside Delivery
<input type="checkbox"/> Shipment is scheduled for Saturday pickup	<input type="checkbox"/> Shipment is scheduled for Saturday delivery
<input type="checkbox"/> <b>Shipment is Residential Delivery</b> If Recipient Address is in a rural area (defined by table lookup), additional charge will be applied. This element is not applicable to the FedEx Home Delivery service.	

---

**Handling charges**

**Charge amount:**

Apply

4. Adjust the settings in the 'FedEx options' dialog box according to your preferences.

5. Click the **Apply** button to save the changes.

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.

### 3.4.2.5. 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 Admin area, go to the 'General settings->Shipping options' section.
  - b) On the 'General settings->Shipping options' page, select the check box 'Enable real-time shipping calculation'. Unselect the check box 'Use Intershipper calculation service'.
  - 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 Admin area (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:**

**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.

**Maximum package dimensions (inches)\*:** Length  x Width  x Height

**Always use the same package dimensions as specified in the "Maximum package dimensions" fields:**

**Maximum package weight (lbs)\*:**  (Should not exceed 66.1376 lbs)

\* The settings "Maximum package weight" and "Maximum package dimensions" define the maximum weight and size of the shipping package that you do not wish to be exceeded when products are shipped to customers. If the total weight and/or volume of the products ordered by a customer exceed the limitations defined by these settings, the shipment is split into several packages.  
Please note that the maximum package weight and maximum package dimensions that you set on this page must not exceed the actual limitations imposed by Canada Post service. If you set the maximum package weight or any of the maximum package dimension values to zero, X-Cart will use the default limitations established by Canada Post.

- c) Adjust the options according to your preferences.
- d) Click the **Apply** button.

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 Admin area, go to the 'General settings->Shipping options' section.
  - b) On the 'General settings->Shipping options' page, select the check box 'Enable real-time shipping calculation'. Unselect the check box 'Use Intershipper calculation service'.
3. Adjust Australia Post options:
- a) Go to the 'Shipping methods' section of your store's Admin area (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.

**Australia Post options**

Maximum package weight (lbs):

Maximum package dimensions (inches):  
Length:  × Width:  × Height:

Split the shipment into multiple packages if its weight/dimensions exceed the limitations:

Always use the same package dimensions as specified in the "Maximum package dimensions" fields:

**Note:** The settings "Maximum package weight" and "Maximum package dimensions" define the maximum weight and size of the shipping package that you do not wish to be exceeded when products are shipped to customers. If the total weight and/or volume of the products ordered by a customer exceed the limitations defined by these settings, and the checkbox "Split the shipment into multiple packages" is selected, the shipment is split into several packages.  
Please note that the maximum package weight and maximum package dimensions that you set on this page must not exceed the actual limitations imposed by Australia Post service. Currently weight must not exceed 20 kg, dimensions - 105 cm, and girth - 140 cm.  
If you set the maximum package weight or any of the maximum package dimension values to zero, X-Cart will use the default limitations established by Australia Post.

- c) Adjust the options according to your preferences.
- d) Click the **Apply** button.

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 Admin area (Management menu->Shipping methods) and click the 'Test Real-time Shipping Rates Calculation' link 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 (Inventory menu->Shipping charges). 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:** You can make any shipping method available for more than one destination zone, or set up different shipping rules for the same method within one destination zone.

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

In X-Cart GOLD, both shipping methods and shipping charges are defined by the store administrator. If he fails to define shipping charges for certain shipping methods, such methods will be unavailable to customers.

In X-Cart PRO, the store administrator defines only shipping methods, shipping charges for these methods are defined by providers. If providers fail to define shipping charges for some shipping method, the shipping cost for this method will be "0" (zero).

## Defining shipping charges

1. Go to the 'Shipping charges' section.
2. Scroll to the 'Add shipping charge values' section of the 'Shipping charges' form.
3. Define the shipping rule, adjust the fields as follows:
  - Shipping method: The shipping method for which you wish the shipping rule to be used.
  - Zone: The destination zone for which you wish the shipping rule to be used.
  - Weight range: The weight range for which you wish the shipping rule to be used. Must be set in units of weight used by the store.
  - Order subtotal range: The order subtotal range for which you wish the shipping rule to be used. Must be set in units of primary currency used by the store.

**Note:** If you do not wish to limit the weight and/or order subtotal ranges, set the respective values to 999999.9.

- Flat charge: The fixed amount that you wish to charge per order. Must be set in units of primary currency used by the store.
- Percent charge: The amount that you wish to charge based on the order subtotal. Must be set in percent.
- Per item charge: The fixed amount that you wish to charge for each item in the shopping cart. Must be set in units of primary currency used by the store.

- Per *<unit of weight>* charge: The fixed amount that you wish to charge per unit of weight (For example, the amount you wish to charge per kilogram of total order weight). Must be set in units of primary currency used by the store.

4. Click the **Add** button.

After shipping charges are defined, the cost of shipping in your store will be 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 Shipping cost.

**Rate** is the amount defined by the 'Flat charge' field.

**Weight\_Rate** is the amount defined by the 'Per <unit of weight> charge' field.

**Item\_Rate** is the amount defined by the 'Per item charge' field.

**Percent\_Rate** is the amount defined by the 'Percent charge' field.

**TOTAL\_WEIGHT** is the total weight of the order (sum of weights of all the items in the shopping cart).

**ITEMS** is the total number of items in the shopping cart.

**SUM** is the order total amount.

## Modifying shipping charges

1. Go to the 'Shipping charges' section.
2. Select the group of shipping methods the charges for which you need to modify. Select the destination 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 the **Update** button.

## Deleting shipping charges

1. Go to the 'Shipping charges' section.
2. Select the group of shipping methods to which the shipping charge you need to delete applies. Select the destination 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 the **Delete selected** button.

### 3.4.4 Shipping Markups

You can 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).

Shipping markups are defined using X-Cart's 'Shipping markups' section (Inventory menu->Shipping markups).

**Note:** The 'Shipping markups' item appears in the Inventory menu only after the option 'Enable real-time shipping calculation' is enabled in General settings/Shipping options.

Shipping markups are defined similar to shipping charges.

After you define markups, the shipping cost in your store will be calculated according to the formula:

**SHIPPING = Rate + Markup + TOTAL\_WEIGHT\*Weight\_Markup + ITEMS\*Item\_Markup + SUM\*Percent\_Markup/100**

Where:

**SHIPPING** is the shipping cost.

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

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

**Weight\_Markup** is a shipping markup based on product weight (the value of the 'Per lbs charge' field).

**Item\_Markup** is a shipping markup applied per item ordered (the value of the 'Per Item charge' field).

**Percent\_Markup** is a shipping markup calculated as percent of the total order amount (the value of the

'Percent charge (%)' field)

**TOTAL\_WEIGHT** is the sum of weights of all the items in the shopping cart (variable).

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

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

If a markup needs to 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.

### 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's 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 Admin area (Management menu->Taxing system). A dialog box titled 'Taxes' opens:

Taxes			
TAX	APPLY TAX TO	PRIORITY	STATUS
There are no taxes defined			
<input type="button" value="Add new..."/>			

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](#) >

**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. A tax service name may include letters (A-Z, a-z) and digits (0-9), may not exceed 10 characters in length and must begin with a letter. This value will not appear anywhere in your store's Customer area.
- **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 the **Save**

button.

- 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 the **Save** button. 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 Admin area 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"/>	VAT17_5	DST+SH	10	Enabled
<input type="checkbox"/>	VAT5	DST+SH	20	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 Admin area (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	<a href="#">Taxes list</a> >
<b>Tax display name:</b>	VAT 17%	
<b>Status:</b>	Enabled	
<b>Apply tax to:</b>	DST+SH	
<b>Rates depend on:</b>	Shipping Address	

**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
No tax rates defined			

---

**Add tax rate**

Rate value: \*  %

Zone: \*

Membership: \*

Premium  
Wholesale

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.

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 happen 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	All	17.500 %	DST+SH

Update    Delete selected

---

**Add tax rate**

Rate value: \*  %

Zone: \*

Membership: \* 

- All
- Premium
- Wholesale

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.

Apply tax to:

=

Undo    Redo    Clear

+   -   \*   /

Add

Add

Add

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:

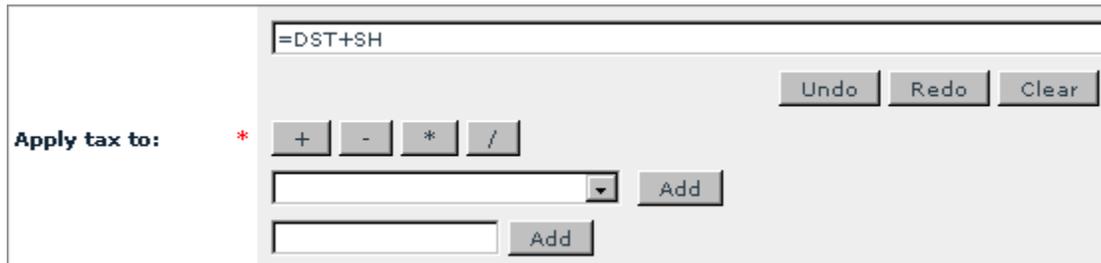
1. In the 'Taxes' dialog box, find the tax rate that you would like to change and click on its name. The 'Tax details' section opens.
2. In the '<Tax name>: Tax rates' dialog box, find the rate whose details you wish to edit.
3. Click either on the membership link (MEMBERSHIP column) or on the tax formula 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 the **Delete selected** button.

### 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.



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 the **Add** button.
- b) Click on [ + ].

c) Select *SH* from the drop-down box, click the **Add** button.

You can cancel the latest action using the **Undo** button, re-apply the change after the cancellation by clicking on **Redo**, 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:	<input checked="" type="checkbox"/>
Display a tax rate for each product in cart/order:	<input checked="" type="checkbox"/>
Enable tax exemption for customers:	<input type="checkbox"/>
Allow customers to modify their tax number after tax exemption is enabled:	<input type="checkbox"/>

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:</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 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:</b>	<b>\$156.45</b> (€ 136.11)
			<b>Shipping cost:</b>	<b>\$13.73</b> (€ 11.95)
			<b>TOTAL:</b>	<b>\$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%	<b>\$100.00</b>	<b>\$100.00</b>
1	SKU17514	Product_2	Sales tax: 5%	<b>\$49.00</b>	<b>\$49.00</b>
<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 Admin area 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 the **Save** button.

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 the **Add** button.

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 administrator, others depend on external online processing services like PayPal, Authorize.Net, 2Checkout, WorldPay, Sage Pay 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 Admin area (Administration menu->Payment methods). This section contains two dialog boxes - 'Payment methods':

**Payment methods**

Language: English ▼

[Check all](#) / [Uncheck all](#)

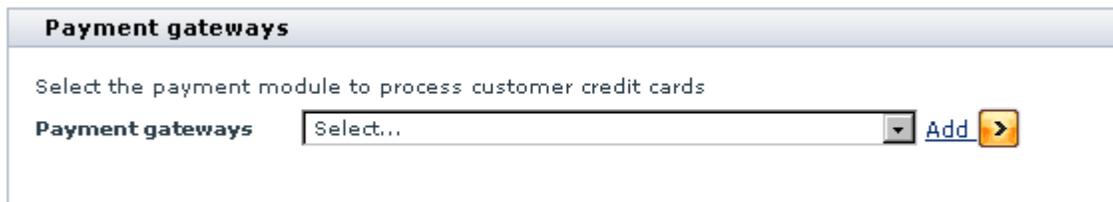
	Methods	Special instructions	Protocol	Membership	Pos.
<input checked="" type="checkbox"/>	<input type="text" value="Credit Card"/> Extra charge: <input type="text" value="0.00"/> \$ <input type="checkbox"/> Cash on delivery method	<input type="text" value="Visa, Mastercard, American Express"/>	<input type="text" value="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="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"/>	<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"/>

Cash on delivery method

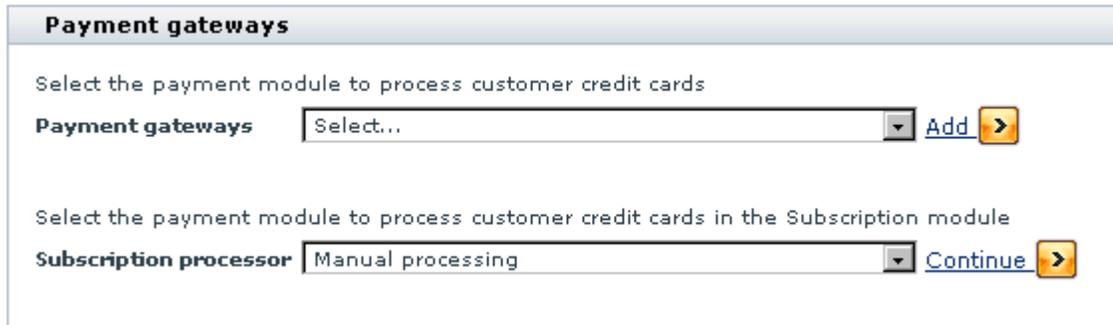
Extra charge:  \$

Cash on delivery method

and 'Payment gateways':



(The latter one may contain an additional drop-down box when Subscriptions module is enabled):



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 administrator 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.

**Note:** You can specify negative surcharge. In this case this amount will work as a payment discount in the customer area.

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.

**Note:** If you use any online payment methods, make sure you do not close access to the <xcart\_root>/payment directory by your .htaccess file. In case access to this directory is closed, when an external server of a payment gateway tries to send a callback to X-Cart, it gets an "access denied" reply. As a result, the order will never be processed.

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.

**Important:** The files of payment method certificates or keys are usually stored in the payment/certs directory. If they are stored in some other directory (for example, the key files of CyberSource are stored in the payment/ics/keys), make sure this directory is protected by the .htaccess file. Otherwise your certificates can be stolen.

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 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: 80%;" type="text"/>	<input style="width: 95%;" 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 the **Add new** button.

**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 check box.
3. Click the **Update** button.

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 the **Delete selected** button.

## 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 Admin area (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 Admin area (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 user manual of the add-on (User 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 displays the X-Cart v.4.2.3 user interface. At the top, there is a navigation bar with links for Home, Shopping Cart, and Contact Us, along with contact information: CALL US: 1-800-555-5555 International: 500-555-5555. Below this is a search bar and a language selector set to English. A yellow callout box points to the 'Categories' menu in the sidebar, which is displayed horizontally. The sidebar also includes a 'Help' section with links for Contact us, Privacy statement, and Terms & Conditions. The main content area features a welcome message, a 'Featured products' section with two items: 'Javascript (Definitive Guide)' and 'Flash 5 for Windows and Macintosh', and a 'Your cart' section showing an empty cart. The 'Authentication' section includes 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.

The screenshot displays the X-Cart e-commerce interface. At the top, there are navigation links for Home, Shopping Cart, and Contact Us, along with contact information: CALL US: 1-800-555-5555 and International: 500-555-5555. A search bar and a language selector (set to English) are also present.

The main content area shows the category page for 'Books'. A yellow callout box points to the subcategory 'Internet Software' with the text 'Subcategories of the category 'Books''. The 'Books' category is listed with '6 Products', and 'Internet Software' is listed with '4 Products'. A 'Printable version' link is visible in the top right of the main content area.

On the left, there is a 'Categories' sidebar with a list of product categories: Books, CD - DVD - Video, Computer hardware, Electronics, Games and toys, Gifts, Household, Men's clothes, Software, and Sport. Below this is a 'Help' section with links for Contact us, Privacy statement, and Terms & Conditions.

On the right, there is a 'Your cart' section showing 'Cart is empty' and links for View cart, Checkout, Wish list, and Orders history. Below that is an 'Authentication' section with fields for Username and Password, and buttons for Log in and Register. A Recover password link is also present.

At the bottom of the page, it says 'Powered by X-Cart ecommerce shopping cart software' and 'Copyright © 2005-2008 Your Company Name'.

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:

The screenshot displays the X-Cart storefront interface. At the top, there is a navigation bar with links for Home, Shopping Cart, and Contact Us, along with contact information: CALL US: 1-800-555-5555 International: 500-555-5555. Below this is a search bar and a language selector set to English. The main content area features a left sidebar with a 'Categories' menu listing various product types like Books, CD - DVD - Video, Computer hardware, etc. The main content area shows the 'Books' category page, with a heading 'Your Company Name :: Books' and a description 'My Description of the category'. A yellow box labeled 'Description of the category 'Books'' points to this text. Below the description is a table listing products under the 'Books' category, with a yellow box labeled 'Category icon' pointing to the 'Internet Software' product icon. On the right side, there are sections for 'Your cart' (showing 'Cart is empty') and 'Authentication' (with fields for Username and Password, and buttons for Log in, Register, and Recover password). The footer contains the text 'Powered by X-Cart ecommerce shopping cart software' and 'Copyright © 2005-2008 Your Company Name'.

Custom product categories can be created and managed through the 'Categories Management' section of the Admin area (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

In a new store, before any products can be added, you must create categories. You can create as many categories as you like, but please be aware that the number of categories in your store will affect the store's performance: using a large number of categories and/or a large number of levels of category nesting can make your store slower or, on some configurations, even render your store unusable. We recommend that, wherever possible, you keep the number of categories to a minimum and adjust the `memory_limit` value in `php.ini` adequately to the number of categories used in your store (the more categories and levels of category nesting you use, the more memory will be required). For example, if you need 2500 categories (all at the same level, without nesting), we recommend you set the `memory_limit` value to at least 16 Mb; if you need more categories, the `memory_limit` will need to be set to an even larger value.

To create a new category/subcategory:

1. Go to the 'Categories Management' section of the Admin area (Management menu->Categories). In this section, a dialog box titled 'Categories' is displayed:



2. (*This must be done only if you wish to create a subcategory*): Navigate to the level of the category tree where you wish the category to be located. See [Navigating the category tree](#) for details.
3. Click the **Add new** button. This opens a dialog box titled 'Add category'.
4. In the 'Add category' dialog box, define the details of the new category (See [Defining Category Details](#)).
3. Click the **Save** button at the bottom of the 'Add category' dialog box.

When you click on **Save**, the category is created. A message is displayed confirming that the category has been created successfully.

## 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 area (Management menu->Categories):

Categories				
POS.	CATEGORY NAME	PRODUCTS*	SUBCATEGORIES	ENABLED
<input type="text" value="10"/>	<input checked="" type="radio"/> Books	n/a (14)	2	<input type="text" value="Yes"/>
<input type="text" value="20"/>	<input type="radio"/> CD - DVD - Video	n/a (18)	3	<input type="text" value="Yes"/>
<input type="text" value="30"/>	<input type="radio"/> Computer hardware	16 (16)	16	<input type="text" value="Yes"/>
<input type="text" value="40"/>	<input type="radio"/> Electronics	10 (10)	10	<input type="text" value="Yes"/>
<input type="text" value="55"/>	<input type="radio"/> Gifts	2 (3)	n/a	<input type="text" value="Yes"/>
<input type="text" value="60"/>	<input type="radio"/> Household	n/a (16)	6	<input type="text" value="Yes"/>
<input type="text" value="65"/>	<input type="radio"/> Men's clothes	n/a (6)	2	<input type="text" value="Yes"/>
<input type="text" value="70"/>	<input type="radio"/> Software	2 (2)	n/a	<input type="text" value="Yes"/>
<input type="text" value="80"/>	<input type="radio"/> Sport	n/a (2)	n/a	<input type="text" value="Yes"/>

\*Note: The number in parentheses is the number of products in the category including all the subcategories.

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:

The screenshot shows a web interface for managing categories. At the top, the title is 'Categories'. Below it, a breadcrumb navigation bar shows 'Root level > Books'. The current category is 'Books', and there are three buttons: 'Modify category', 'Category products', and 'Delete category'. Below this is a section for 'Subcategories' with a table listing them. The table has columns for 'POS.', 'CATEGORY NAME', 'PRODUCTS\*', 'SUBCATEGORIES', and 'ENABLED'. There are two subcategories: 'Internet' and 'Software'. A note explains that the number in parentheses in the 'PRODUCTS\*' column includes all subcategories. At the bottom, there are buttons for 'Update', 'Modify selected', 'Delete selected', and 'Add new...'. Annotations with arrows point to the breadcrumb 'Books', the 'Current category: "Books"' text, and the 'Software' row in the table.

POS.	CATEGORY NAME	PRODUCTS*	SUBCATEGORIES	ENABLED
<input type="checkbox"/>	<input checked="" type="radio"/> Internet	6 (6)	n/a	<input type="checkbox"/> Yes
<input type="checkbox"/>	<input type="radio"/> Software	4 (4)	n/a	<input type="checkbox"/> Yes

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)

**Subcategories**

POS.	CATEGORY NAME	PRODUCTS*	SUBCATEGORIES	ENABLED
<input type="text" value="0"/>	<input checked="" type="radio"/> Internet	6 (6)	n/a	<input type="text" value="Yes"/>
<input type="text" value="0"/>	<input type="radio"/> Software	4 (4)	n/a	<input type="text" value="Yes"/>

\*Note: The number in parentheses is the number of products in the category including all the subcategories.

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 area (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 the **Update** button. The order of the categories in the Customer area 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 area.

To disable one or more categories:

1. Go to the 'Categories Management' section of the Admin area (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 the **Update** button. 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 area (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 IN STOCK	PRICE (\$)
<input type="checkbox"/>	SKU83	<b>ViaVoice Pro 7.0 Millennium Edition</b>	<input type="text" value="0"/>	<input type="text" value="100"/>	<input type="text" value="33.99"/>
<input type="checkbox"/>	SKU174	<b>Windows Millennium</b>	<input type="text" value="0"/>	<input type="text" value="100"/>	<input type="text" value="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 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 area (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 description:**

---

**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 the **Save** button 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 area (Management menu->Categories). You should see a form titled 'Categories'.
2. Use the 'Categories' form to locate the category you wish to delete.

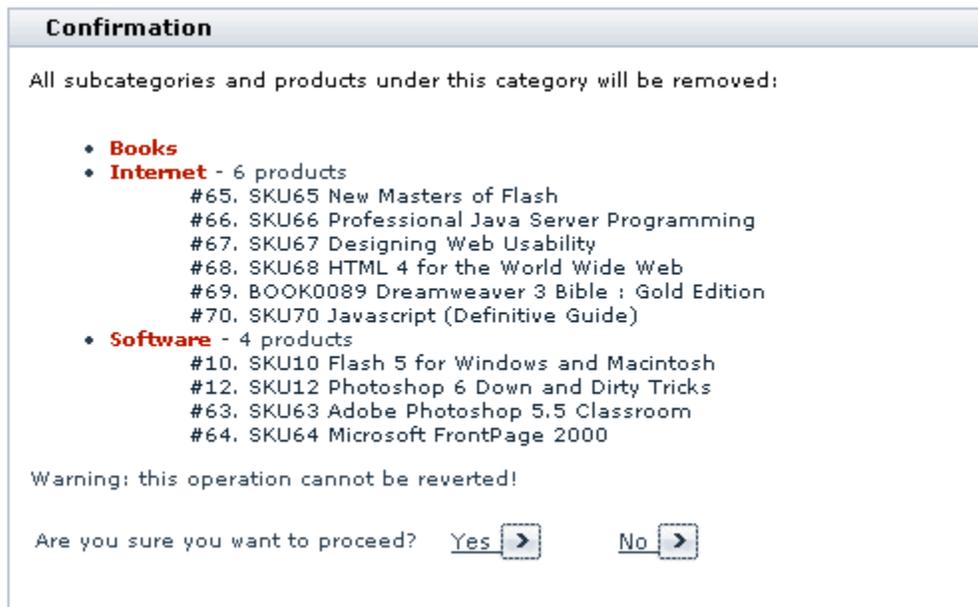
**Note:** You can freely move between category levels by using category name links and the category level navigation bar: clicking on the name of a category brings you to a lower level in your category tree; clicking on a link in the category level navigation bar brings you to that specific level. See [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.

### 4.1.3 Defining Category Details

The details of a category (including the category location, description, category icon, etc) are defined in the 'Add category' dialog box.

### Add Category

Current category: "Root level"

**Category icon:** 

**Position:**

**Category:** \*

**Clean URL:**  [What is Clean URL?](#)  
**Note:** The Clean URLs functionality is now disabled. You can enable it through the [General settings->SEO options](#) section.

---

**META keywords:**

**META description:**

**Use the META data of this category for all the subcategories and products contained in this category:**   
**Note:** The META data of this category will be used only for the subcategories and products that do not have META data of their own.

To define the details of a category:

1. Use the 'Category icon' section of the 'Add category' dialog box to add an icon for the category.

If you choose not to add an icon for the category, the category will use the icon of its parent category (or - if the parent category does not have an icon of its own - of its grandparent category). If the category is located at the root level, it will not use any icon.

2. Complete the following fields:

- **Position:** The position of the category in the list of categories. The position of a category 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 are placed closer to the top of the list.

If you choose 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.

- **Category:** The name by which you and your customers will be able to identify the category.
- **Clean URL:** The clean URL value for this category. Instructions for adjusting this field are available in the section [Defining Clean URL Values](#) of this manual.

**Note:** The field 'Clean URL' needs to be adjusted only if X-Cart's Clean URLs functionality is enabled in your store. If the Clean URLs functionality is disabled, the field 'Clean URL' is inactive.

- **Description:** The description of this category (will be displayed to customers).

**Note:** You can enter the description in WYSIWYG mode if your store has the module HTML Editor enabled. For details, see the section [HTML Editor](#) in this manual.

- **Membership:** The membership level(s) that you wish to be able to view this category. *All* 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 makes the category visible only to the members of this level; non-members and users of other membership levels will not be able to see this category.
- **Availability:** This option allows you to specify whether this category must be visible in the Customer area. *Enabled* means that the category will be visible to all the visitors of the Customer area who meet the membership requirement. *Disabled* means that the category will not visible to anyone.
- **META keywords:** The keywords to be used in the keywords meta tag on the pages of this category.
- **META description:** The description to be used in the description meta tag on the pages of this category.

For more information on using the description and keywords meta tags, see the section [Using HTML Meta Tags](#) of this manual.

- **Use the META data of this category for all the subcategories and products contained in this category:** This option allows you to specify whether the meta keywords and meta description of this category must be used for the subcategories and products contained in this category. If this option is enabled, the subcategories and products of this category which do not have meta keywords of their own will use the meta keywords of this category, whereas the subcategories and products which do not have a

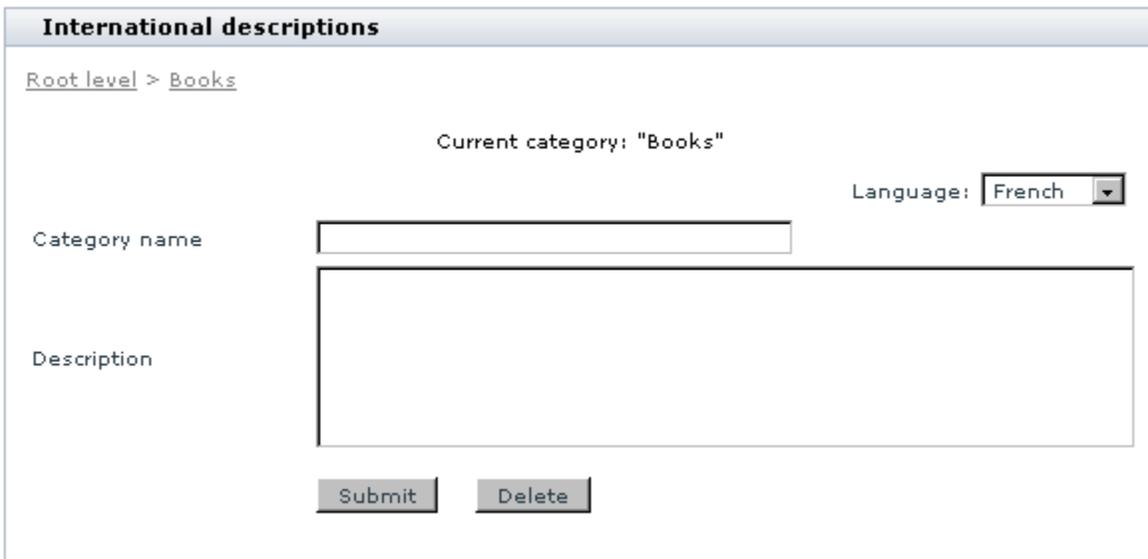
meta description of their own will use the meta description of this category. If this option is disabled, the subcategories and products of this category which do not have meta keywords of their own will use the global meta keywords defined on the 'General settings/SEO options' page, whereas the subcategories and products of this category which do not have a meta description of their own will use the global meta description defined on the 'General settings/SEO options' page.

## 4.1.4 Defining International Category Descriptions

If your store supports more than one languages, you must provide names and descriptions for your categories in all the languages supported by your store. In X-Cart, a combination of the name and description of a category in a language other than default is called the category's *international description*.

To add an international description for a category:

1. Find the category for which you wish to add an international description and open it for editing.
2. Click on link 'International descriptions' in the section menu. This displays a dialog box titled 'International descriptions'.



The screenshot shows a web interface for editing international descriptions. At the top, there's a title bar 'International descriptions' and a breadcrumb 'Root level > Books'. Below that, it says 'Current category: "Books"'. To the right, there's a 'Language:' dropdown menu currently set to 'French'. The main area contains two input fields: 'Category name' (a single-line text box) and 'Description' (a larger multi-line text area). At the bottom, there are two buttons: 'Submit' and 'Delete'.

3. In the 'International descriptions' dialog box, switch the language selector to the language in which you wish to add an international description. The language of the interface changes to the selected language.
4. Edit the name and description of the category translating them into the selected language.

5. Click the **Save** button.

When you click on **Save**, the international description is added. A message is displayed confirming that the international description has been updated successfully.

To edit an international description of a category:

1. Find the category whose international description you wish to edit and open it for editing.
2. To open the 'International descriptions' dialog box, use the link 'International descriptions' in the section menu.
3. In the 'International descriptions' dialog box, switch the language selector to the language of the international description that you wish to edit. The language of the interface changes to the selected language.
4. Edit the name and/or description of the manufacturer category.
5. Click the **Save** button.

When you click on **Save**, the international description is updated. A message is displayed confirming that the international description has been updated successfully.

To delete an international description of a category:

1. Find the category whose international description you wish to delete and open it for editing.
2. To open the 'International descriptions' dialog box, use the link 'International descriptions' in the section menu.
3. In the 'International descriptions' dialog box, switch the language selector to the language of the international description that you wish to delete. The language of the interface changes to the selected language.
4. Click the **Delete** button.

When you click on **Delete**, the international description is deleted. A message is displayed confirming that the international description has been deleted successfully.

## 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.

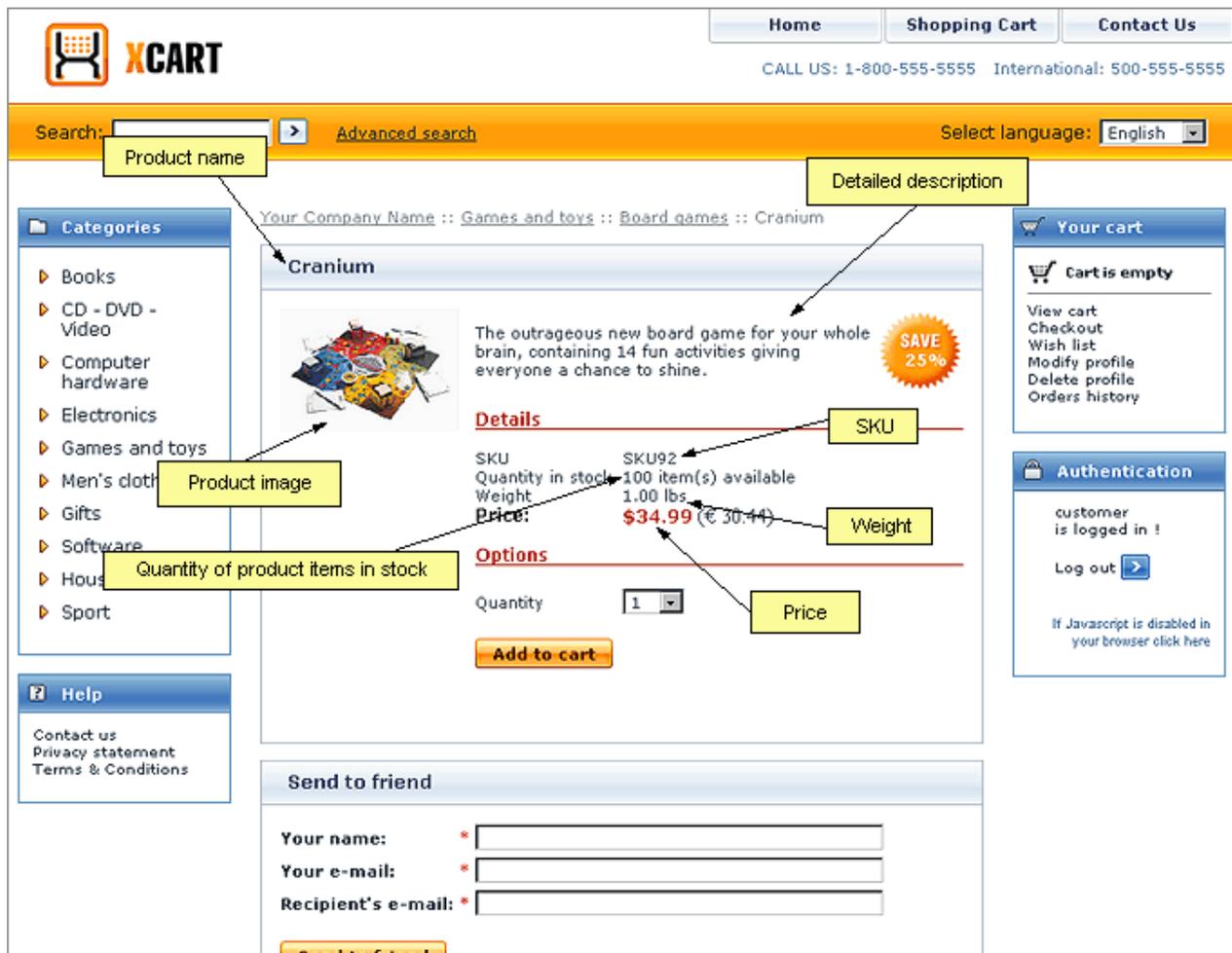
Your customers will be able to access this information by browsing through the product catalog or by viewing the results returned by a product search.

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 displays the X-Cart v.4.2.3 user interface. At the top, there is a navigation bar with links for Home, Shopping Cart, and Contact Us, along with contact information: CALL US: 1-800-555-5555 and International: 500-555-5555. Below this is a search bar with a search button and a link to Advanced search. The main content area is titled 'Board games' and features a list of products. The first product is 'Cranium', with a thumbnail image, a product image, a short description, a market price of \$46.65, and a current price of \$34.99 (€ 30.44), representing a 25% discount. A quantity selector is set to 1, and a 'Buy Now' button is visible. The second product is 'Lord of the Rings Board Game', with a similar layout. The left sidebar contains a 'Categories' menu with options like Books, CD - DVD - Video, Computer hardware, Electronics, Games and toys, Gifts, Household, Men's clothes, Software, and Sport. A 'Help' section is also present. The right sidebar shows 'Your cart' (empty) and 'Authentication' options, including a 'Log out' button. Annotations with yellow boxes and arrows point to specific elements: 'Thumbnail image' points to the small product image; 'Product image' points to the larger product image; 'Short description' points to the text below the product image; 'List (Market) price' points to the market price; and 'Price' points to the current price.

'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):



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](#)):
  - [search](#) for products by specific 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,
  - [export](#) products to a CSV file.

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,
  - [export](#) products to a CSV file.
- You cannot control products created by any other providers.

## 4.2.1 Adding Products

X-Cart provides three methods by which products can be added:

- [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's back end),
- [cloning](#) (New products are created by making copies of already existing products),
- [import](#) from a CSV file (Specially formatted product information is imported into the database using X-Cart's import/export functionality).

### Creating products (manually)

In X-Cart, products can be created only inside categories. To create products, you must have at least one category in your store.

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:* Go to the 'Products Management' section (Management menu->Products), then click on the link Add product in the 'Products Management' section menu.

*If you are an X-Cart PRO provider:* Click on the link Add new product in the Products menu.

In the 'Products Management->Add product' section, a dialog box titled 'Product details' is displayed.

2. In the 'Product details' dialog box, define the details of the new product (See the section [Defining Product Details](#)).
3. Click the **Save** button at the bottom of the 'Product details' dialog box.

When you click on **Save**, the product is created. A message is displayed confirming that the product has been created successfully.

After a product has been created, you can define other product information for it (See the section [Defining Other Product Information](#)).

## 4.2.2 Managing Existing Products

### Searching for products

To be able to view or modify the details of a product, you need to find this product. At any moment, you can do so using X-Cart's 'Search for products' form.

To search for a product:

1. In your store's back end, open the 'Search for products' form:

*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.

The 'Search for products' form opens:

### Search for products

Search for pattern:

All words  Any word  Exact phrase

Search in:  Product title  Short description  Detailed description  Search keywords

---

Search-and-modify

Export search results to a CSV file

[More search options](#)

[Reset filter](#)

2. Use the 'Search for products' form to provide criteria for your search:

- Into the 'Search for pattern' field, enter your search string.
- *(If the search string you provided consists of multiple words)* Use the 'All words' / 'Any word' / 'Exact phrase' radio buttons to specify whether the results returned by the search must match all the words, any word or the exact phrase you entered into the 'Search for pattern' field.
- Specify, where you wish X-Cart to search for the string you provided: In the 'Search in' line, select all that apply (Product title, Short description, Detailed description, Search keywords).
- 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.
- If you wish, you can specify more parameters for your search. The link **[+] More search options** allows you to expand the search form and provide more information about the product.

### Search for products

Search for pattern:

All words  Any word  Exact phrase

---

**More search options**

Search in category:

as  Main category  Additional category

also search in subcategories

SKU:

Product ID#:

Provider:

Price (\$):  -

Quantity:  -

Weight (lbs):  -

Availability:

Free shipping:

Global discounts:

Minimum order quantity:

List price:

Shipping freight:

Tax exempt:

Low limit in stock:

[Reset filter](#)

The more details you provide, the more accurate the search results will be.

3. Click the **Search** button.

After you click on **Search**, X-Cart searches for the product in the database and provides a list of search results in a dialog box titled 'Search results':

**Search results** [Search again](#) >

Check all / Uncheck all

	SKU	PRODUCT	QUANTITY IN STOCK	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 the following information about each found product:

- SKU - Product SKU.
- PRODUCT - Product name.
- QUANTITY IN STOCK - Quantity of product pieces available for sale.
- PRICE - Base price.

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.

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):

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.

After you click on **Update**, the edited quantities/prices are updated.

X-Cart GOLD administrator/provider and X-Cart PRO providers can update product quantities and prices by importing them from a CSV-formatted file:

1. Prepare a CSV file with the new product quantities or prices.

### Example:

Below is a sample CSV file with semicolon delimiter:

```
SKU1638; 10.55
SKU1638; Wholesale:5:9.89
SKU1640; 11.25
SKU1640; 5:10.99
```

2. Open the 'Update inventory' section (Products menu->Update inventory). You should see a dialog box titled 'Update inventory'.
3. Depending on what information you wish to be updated, from the 'Update' drop-down box, select either *Quantity in stock* or *Pricing*.
4. From the 'CSV delimiter' drop-down box, select the delimiter used in your CSV file.
5. Use the **Browse...** button to locate your CSV file. Select this file.
6. Click the **Update** button.

After you click on **Update**, the quantities/prices are updated.

## Previewing product details

You can 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 opens a product preview page with a summary of the product's details:

### Cranium



SKU	SKU92
Category	Board games
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 in stock	100 item(s) available
Weight	1.00 lbs

[Modify](#) > [Clone](#) > [Delete](#) >

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 opens a page with the details of the selected product.

3. Edit the product information as desired. For details, see the section [Defining Product Details](#) and [Defining Other Product Information](#).

### 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). You can use the [Check all](#) link to select all the products on the page.
3. Click the **Modify selected** button.

This opens a page with a list of products selected for modification:

Product list	
SKU	PRODUCT
SKU94	Monopoly Junior
<b>SKU92</b>	<b>Cranium</b>
SKU182	DUO
SKU93	Lord of the Rings Board Game
SKU183	MAESTRO

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 images

**Image:**

No image available

No image uploaded

**Thumbnail:**



[Need help?](#)

125x86, 7 kb  
(recommended size: 50x50-150x150)

---

---

#### Details

**SKU:**

**Product name:**

**Clean URL:**

**Search keywords:**

**Short description\* :**

SKU92

Cranium

[What is Clean URL?](#)

**Note:** The Clean URLs functionality is now disabled. You can enable it through the [General settings->SEO options](#) section.

The outrageous new board game for your whole brain, containing 14 fun activities giving everyone a chance to shine.

**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 that need to be applied to all of the products in the 'Product list'.

**Note:** You will notice that the check boxes next to some of the fields in the 'Product details' dialog box are inactive; for example, the check boxes next to the fields SKU and Clean URL. These check boxes are made inactive intentionally so they cannot be selected in group editing mode: the values of the respective fields must be unique for each product.

7. Click the **Save** button at the bottom of 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.

When you click on **Save**, the product details you have changed are updated (The ones with selected check boxes are 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).

## Cloning products

When you need to create a product that is just a little bit different from one of the products that is already in your store's database, you may find it convenient to clone the product that already exists instead of creating the new product from scratch. To clone an existing product means to create an exact copy of that product -

a *clone product* - which 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. This creates a clone product. This product is an exact copy of the original product in everything but the name. The name of the clone product is formed of the name of the original product with the addition of '(CLONE)'. A dialog box titled 'Product details' opens displaying the details of the clone product.
4. Edit the details of the clone product as desired: change the product name, description, price, etc. For details, see the section [Defining Product Details](#).

After you save the changes, the new product is created.

**Important:** If the original product had any other product information besides product details, be sure to edit this information for the new product (See the section and [Defining Other Product Information](#)).

## 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 on 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](#) 

**HTML-code:**

```
<table cellspacing="0"
class="SimpleButton"><tr><td><a class="Button"
href="http://example.com/shop/cart.php?
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 that need to be added to the shopping cart and to specify the product options with which they wish these items to 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 = "/shop";
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 for a product:

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.

After you click on **Generate HTML links**, X-Cart generates HTML links for the selected product. Now you can copy the HTML code for the desired link(s) and paste it into any web page.

## Deleting products

Products that you do not wish to sell and keep in your store 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. When prompted, confirm the deletion:



After you confirm the deletion, the selected products are removed. A message is displayed confirming that the selected products have been deleted successfully.

## Exporting products

You can export some or all of the products from the search results to a CSV file.

To export specific products from the search results to a CSV file:

1. In the 'Search results' dialog box, select the products you wish to export (Select the respective check boxes).
2. Click the **Export selected** button. This opens your store's 'Export data' section.
3. Use the 'Export data' section to export the products (See [Exporting Data](#)).

To export all the found products from the search results to a CSV file:

1. In the 'Search results' dialog box, click the **Export all found** button. This opens your store's 'Export data' section.
2. Use the 'Export data' section to export the products (See [Exporting Data](#)).

### 4.2.3 Defining Product Details

When you create a new product or modify an existing product, the details of the product are defined in the 'Product details' dialog box. This 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.

**Note:** The fields 'Apply taxes' and 'Membership' appear in the 'Product details' dialog box only if membership levels and taxes have been adjusted in your store.

**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.

#### Product images

This section allows you to add the images that will represent the product on the storefront: a product image and a product thumbnail. A product thumbnail 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.

**Product details**

**Product images**

**Image:**

No image available

No image uploaded

Upload image

**Thumbnail:**

No image available

[Need help?](#)

No thumbnail uploaded  
(recommended size: 50x50-150x150)

Upload thumbnail

To add a product image:

1. Click the **Upload image** button below the 'Image' area. A dialog box titled 'Image selection' appears.
2. Use the 'Image selection' dialog box to select the desired image:
  - If the file is located on the server or on your local computer, use the appropriate **Browse...** button to select the image filename and click the **Apply** button.
  - If the image is located on the Internet, enter the image URL and click the **Apply** button.

After you click on **Apply**, the selected image appears in the 'Image' area of the 'Product details' dialog box. The new image is marked '*modified*' to show that it has not been saved yet. After you finish completing the fields of the 'Product details' dialog box and click the **Save** button, the image will be saved.

Before the uploaded image has been saved with the **Save** button, you can reset it to the image used previously with the **Reset image** button (This button appears below the 'Image' area after you upload an image to be used as the product's product image).

After you save the image, the resetting operation becomes unavailable, but you can upload a different product image instead of the currently saved one using the **Change image** button.

To remove a previously saved image, use the **Delete image** button.

A product thumbnail can be uploaded separately or generated from the product image.

**Note:** Generation of product thumbnails from product images is available only if GD library is installed on the system.

To add a product thumbnail:

1. Click the **Upload thumbnail** button below the 'Thumbnail' area. A dialog box titled 'Image selection' appears.
2. Use the 'Image selection' dialog box to select the desired image:
  - If the file is located on the server or on your local computer, use the appropriate **Browse...** button to select the image filename and click the **Apply** button.
  - If the image is located on the Internet, enter the image URL and click the **Apply** button.

After you click on **Apply**, the selected image appears in the 'Thumbnail' area of the 'Product details' dialog box. The new image is marked '*modified*' to show that it has not been saved yet. After you finish completing the fields of the 'Product details' dialog box and click the **Save** button, the image will be saved.

To generate a product thumbnail from a product image:

1. Add a product image as described above.
2. Click the **Generate thumbnail** button below the 'Thumbnail' area.

After you click on **Generate thumbnail**, the thumbnail image is generated automatically. The new image is marked '*modified*' to show that it has not been saved yet. After you finish completing the fields of the 'Product details' dialog box and click the **Save** button, the image will be saved.

Before the uploaded thumbnail image has been saved with the **Save** button, you can reset it to the image used previously with the **Reset thumbnail** button (This button appears below the 'Thumbnail' area after you upload an image to be used as the product's thumbnail).

After you save the thumbnail image, the resetting operation becomes unavailable, but you can upload a different thumbnail image instead of the currently saved one using the **Change thumbnail** button.

To remove a previously saved thumbnail image, use the **Delete thumbnail** button.

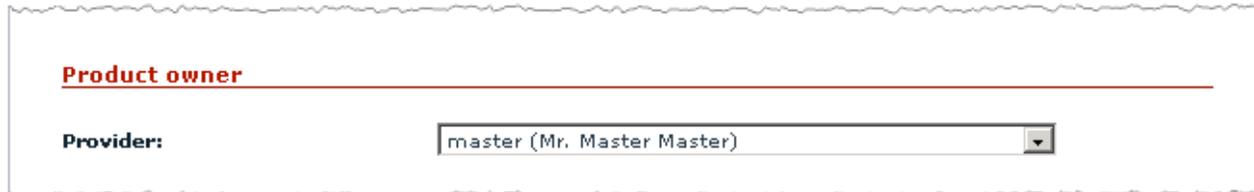
You may choose not add a thumbnail image for the product; in this case, the default 'No image available' image will be displayed in the place of the product's thumbnail.

**Note:** The default 'No image available' images can be defined via Administration menu->Images Location.

You may choose not to add a product image for the product and just add a product thumbnail; in this case, the product's thumbnail image will be displayed in the place of the product image.

### 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 administrator created the product).



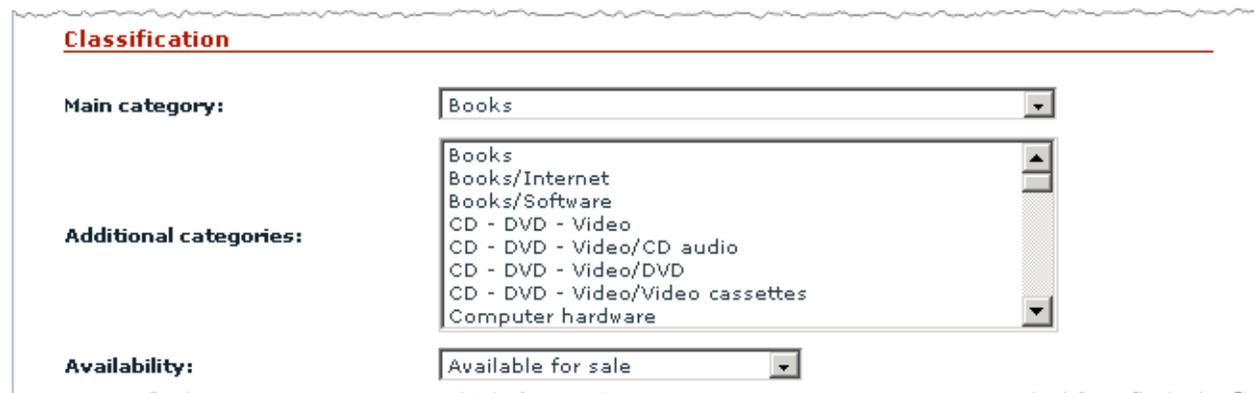
**Product owner**

**Provider:** master (Mr. Master Master)

The contents of this section is defined automatically in X-Cart GOLD and in the Provider area 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 must 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:

**SKU:**

**Product name:**

**Clean URL:**

[What is Clean URL?](#)  
**Note:** The Clean URLs functionality is now disabled. You can enable it through the [General settings>SEO options](#) section.

**Note:** The maximum length of a clean URL value is 255 characters. Allowed characters are A-Z, a-z, 0-9, slash (/), dot (.), hyphen (-), and underscore (\_). Do not use spaces, and do not include slashes at the beginning or at the end. Do not include the web path to your store's directory or file extensions, like ".html" (Extensions are set separately for each type of pages through the [General settings->SEO options](#) section).

**Search keywords:**

[Default editor](#) [WYSIWYG editor](#)

**Short description\* :**

[Default editor](#) [WYSIWYG editor](#)

**Detailed description\* :**

- **SKU:** Stock Keeping Unit; the 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.

- **Product name:** The title by which you and your customers will be able to identify the product.
- **Clean URL:** The clean URL value for this product. Instructions for adjusting this field are available in the section [Defining Clean URL Values](#) of this manual.

**Note:** The field 'Clean URL' needs to be adjusted only if X-Cart's Clean URLs functionality is enabled in your store. If the Clean URLs functionality is disabled, the field 'Clean URL' is inactive.

- Search keywords: The words or phrases by which you and your customers will be able to find the product.
- Short description: The short description of the product (will appear in the 'Products list').
- Detailed description: The detailed description of the product (will appear on the product's 'Product details' page).

**Note:** You can enter the short and detailed descriptions in WYSIWYG mode if your store has the module HTML Editor enabled. For details, see the section [HTML Editor](#) in this manual.

Portion 2:



The screenshot shows two text input fields. The top field is labeled "META keywords:" and the bottom field is labeled "META description:". Both fields are empty and have a vertical scrollbar on the right side, indicating they are multi-line text areas.

- META keywords: The keywords to be used in the keywords meta tag on the page of this product.
- META description: The description to be used in the description meta tag on the page of this product.

For more information on using the description and keywords meta tags, see the section [Using HTML Meta Tags](#).

Portion 3:



The screenshot shows two text input fields. The top field is labeled "Price (\$)" and the bottom field is labeled "List price (\$)". Both fields contain the value "0.00".

- Price: The price that will be used as the base price for this product. The price must 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.

- List price: The 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 base 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 4:

Quantity in stock (items)	<input type="text" value="1000"/>
Low limit in stock	<input type="text" value="10"/>
Minimum order quantity	<input type="text" value="1"/>

- **Quantity in stock (items):** Quantity of product pieces available for sale. As your customers order the product, X-Cart's inventory tracking system will track the number of pieces of this product 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 pieces than you actually have.

**Note:** As soon as the last product piece is ordered (and the order is placed with the status 'Queued'), the product's quantity in stock becomes 0 (zero). From that moment, the product is no longer available for ordering. The product is marked 'Out of stock' and remains on the storefront, unless the store administrator 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 area).

- **Low limit in stock:** The number of product pieces remaining in stock that you wish to 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.
- **Minimum order quantity:** The 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 5:

Weight (lbs)	<input type="text" value="1.00"/>
Free shipping	<input type="text" value="No"/>
Shipping freight (\$)	<input type="text" value="0.00"/>
Use the dimensions of this product for shipping cost calculation:	<input type="checkbox"/>
Shipping box dimensions (inches)	Length <input type="text" value="10.00"/> × Width <input type="text" value="8.00"/> × Height <input type="text" value="10.00"/> <a href="#">Check for unavailable shipping methods</a>
Ship in a separate box	<input type="checkbox"/>
Quantity per shipping box	<input type="text" value="1"/>

- Weight: The weight of one piece of this product (must be specified in the units of weight supported by your 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.

- Free shipping: This option allows you to specify whether shipping for this product must be free. Select *No* if you want to charge purchasers of this product for shipping.
- Shipping freight: The fee 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/packaged/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 fee.

**Note:** The field 'Shipping freight' is ignored (shipping freight is not charged) if the option 'Free shipping' is set to Yes.

- Use the dimensions of this product for shipping cost calculation: This option allows you to specify whether you wish the dimensions of this product to be used for shipping rates calculation. If this option is enabled, calculation of shipping rates for orders containing this product will be performed with the consideration of the product's dimensions (not just the product's weight). If this option is disabled, the product will be considered a *small item* (an item whose dimensions are so small that it can fit into any shipping package together with other items without affecting the overall cost of shipping for the package).

**Note:** The option 'Use the dimensions of this product for shipping cost calculation' is relevant only for real-time shipping calculation and works only if the option 'Use product dimensions for shipping rates calculation' in the 'General settings/Shipping options' section is enabled.

- Shipping box dimensions: The length, width and height of the product, or the length, width and

height of the container in which this product will be placed into a shipping package. The dimensions specified here will be used by the packaging algorithm to fit the product into a shipping package. They will also be used by X-Cart to define the list of shipping methods available for the contents of a shopping cart if the cart contains this product (X-Cart will check whether the product's shipping box dimensions meet the package size limitations of each real-time shipping method used by the store, and if it finds that the product's shipping box dimensions exceed the limitations for a specific shipping method, it will make the respective shipping method unavailable for selection by the customer. After you specify the shipping box dimensions for the product and save the product's details by clicking the **Save** button at the bottom of the 'Product details' dialog box, you will be able to view the list of shipping methods that will be unavailable for orders containing this product using the link [Check for unavailable shipping methods](#) displayed next to the 'Shipping box dimensions' field).

**Note:** Shipping box dimensions need to be adjusted only if the option 'Use the dimensions of this product for shipping cost calculation' is enabled.

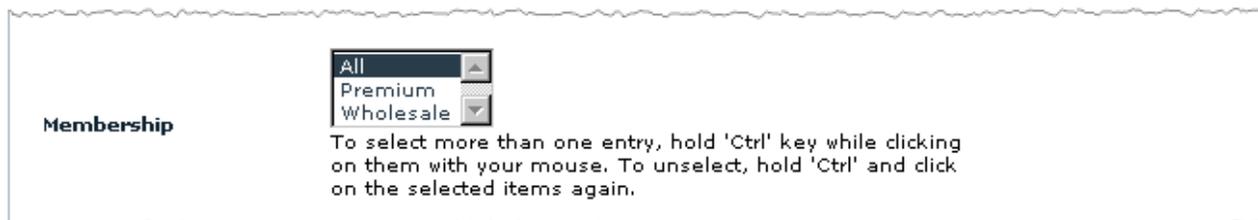
- **Ship in a separate box:** This option allows you to specify whether you wish this product to be shipped separately from any other products ordered in the same order.

**Note:** The option 'Ship in a separate box' needs to be adjusted only if the option 'Use the dimensions of this product for shipping cost calculation' is enabled.

- **Quantity per shipping box:** The number of pieces of the product that fit into one shipping box (the box whose dimensions you specified above in the 'Shipping box dimensions' field). Typically, this value must be set to "1".

**Note:** The setting 'Quantity per shipping box' needs to be adjusted only if the option 'Ship in a separate box' is enabled.

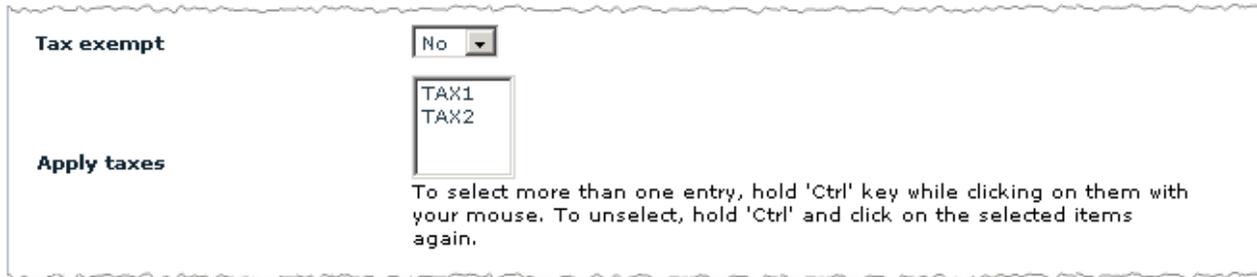
Portion 6:



- **Membership:** The membership levels to which you wish the product to be available. *All* means that the product will be available to all visitors, including non-members and users who are not logged in. Selecting a specific membership level makes the product available only to the members of this level; non-members and users of other membership levels will not be able to see this product. (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 7:



The screenshot shows a dialog box with two main sections. The first section is labeled 'Tax exempt' and contains a dropdown menu with 'No' selected. The second section is labeled 'Apply taxes' and contains a list box with 'TAX1' and 'TAX2' items. Below the list box, there is a note: '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.'

- Tax exempt: This option allows you to specify whether any taxes must be applied to this product. Select Yes if you want this product to be tax exempt.
- Apply taxes: The taxes that you wish to 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 administrator.

Portion 8:



The screenshot shows a dialog box with a single section labeled 'Apply global discounts' and a checked checkbox.

- Apply global discounts: This option allows you to specify whether global discounts must be applied to this product. Select the check box to apply global discounts.

## 4.2.4 Defining Other Product Information

Besides product details, you can provide the following information about your products:

- international product descriptions (this feature is part of X-Cart's basic functionality);
- detailed images (this feature is enabled by X-Cart's [Detailed Product Images](#) module);
- product options/variants (this feature is enabled by X-Cart's [Product Options](#) module);
- wholesale prices (this feature is enabled by X-Cart's [Wholesale Trading](#) module);
- customer reviews (this feature is enabled by X-Cart's [Customer Reviews](#) module);
- upselling links (this feature is enabled by X-Cart's [Upselling Products](#) module);

- subscriptions (this feature is enabled by X-Cart's [Subscriptions](#) module).

### Defining international product descriptions

If your store supports more than one languages, you must provide names and descriptions for your products in all the languages supported by your store. A combination of the name, search keywords, short description and detailed description of a product in any language other than default is called the product's *international description*.

To add an international description for a product:

1. Find the product for which you wish to add an international description and open it for editing.
2. Click on the link 'International descriptions' in the section menu. This displays a dialog box titled 'International descriptions'.
3. In the 'International descriptions' dialog box, switch the language selector to the language in which you wish to add an international description. The language of the interface changes to the selected language.
4. Edit the details of the product translating them into the selected language.
5. Click the **Apply** button.

When you click on **Apply**, the international description is added. A message is displayed confirming that the international description has been updated successfully.

To edit an international product description:

1. Find the product whose international description you wish to edit and open it for editing.
2. To open the 'International descriptions' dialog box, use the link 'International descriptions' in the section menu.
3. In the 'International descriptions' dialog box, switch the language selector to the language of the international description that you wish to edit. The language of the interface changes to the selected language.
4. Edit the name and/or description of the product.
5. Click the **Apply** button.

When you click on **Apply**, the international description is updated. A message is displayed confirming that the international description has been updated successfully.

To delete an international product description:

1. Find the product whose international description you wish to delete and open it for editing.
2. To open the 'International descriptions' dialog box, use the link 'International descriptions' in the section menu.
3. In the 'International descriptions' dialog box, switch the language selector to the language of the international description that you wish to delete. The language of the interface changes to the selected language.
4. Click the **Delete** button.

When you click on **Delete**, the international description is deleted. A message is displayed confirming that the international description has been deleted successfully.

## 4.3 Featured Products

### Featured products in X-Cart

X-Cart allows the store administrator to promote specific products by making them *featured* and showcasing them in featured products lists. Featured products lists are lists of featured products displayed prominently on the main page or on the category pages in the Customer area like this:

The screenshot displays the X-Cart interface for a category page. At the top, there are navigation links for Home, Shopping Cart, and Contact Us, along with contact information. A search bar and language selector are also present. The left sidebar contains a 'Categories' menu and a 'Help' section. The main content area is titled 'Your Company Name :: Books' and includes a 'My Description of the category' section. Below this, there are sub-sections for 'Books' (listing Internet and Software products) and 'Featured products'. The featured product is 'Photoshop 6 Down and Dirty Tricks', with its price and a 'Buy Now' button highlighted. On the right, there are sections for 'Your cart' (showing it is empty) and 'Authentication' (with login and register buttons).

The Customer area main page and the pages of categories can each have a featured products list of their own. The store administrator can choose which products must be added to each specific featured products list.

**Note:** Featured products lists are displayed in the store only when they are not empty. To be displayed on a store page, a featured products list must contain at least one featured product.

## Roles in featured products management

If you are an X-Cart GOLD administrator/provider or an X-Cart PRO administrator:

- You can add any existing product to a featured products list (Check out [Adding Featured Products](#)).
- You can manage products contained in featured products lists (See [Managing Featured Products](#)).

If you are an X-Cart PRO provider:

- You cannot control whether any of your products will appear in a featured products list.

### 4.3.1 Adding Featured Products

You can add products to featured products lists. Any product can be added to as many featured products lists as necessary.

To add a product to a featured products list:

1. Go to the 'Categories Management' section of the Admin area (Management menu->Categories).
2. Browse to the category level where you wish to add a featured product (Instructions for [navigating the category tree](#) are available in the section [Managing Existing Categories](#)). Below the 'Categories' dialog box, you should see a dialog box titled 'Featured products'.

PRODUCT NAME	POS.	ACTIVE
No featured products		

**Add product**

This dialog box allows you to add products to the featured products list at the current level of the category tree.

3. Use the 'Featured products' dialog box to add the product to the featured products list.
  - a) In the 'Add product' section of the 'Featured products' dialog box, select the product to be added as featured. The name of the product must appear in the 'Add product' section as follows:

Featured products			
Check all / Uncheck all			
	PRODUCT NAME	POS.	ACTIVE
<input type="checkbox"/>	Javascript (Definitive Guide)	<input type="text" value="3"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Flash 5 for Windows and Macintosh	<input type="text" value="4"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	PATRICK Maracana HG Cleats	<input type="text" value="5"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Adobe Photoshop 5.5 Classroom	<input type="text" value="7"/>	<input checked="" type="checkbox"/>
<input type="button" value="Delete selected"/>		<input type="button" value="Update"/>	
<b>Add product</b>			
<input type="text" value="New Masters of Flash"/>		<input type="text"/>	<input checked="" type="checkbox"/>
<input type="button" value="Browse..."/>			
<input type="button" value="Add new"/>			

b) (*Optional*) Use the field in the POS. column to specify the position at which you wish this product to appear in the featured products list. If 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.

c) Use the check box in the ACTIVE column to specify whether this product must be visible in the featured products list immediately after creation.

4. Click the **Add new** button.

When you click on **Add new**, the product is added to the featured products list. A message is displayed confirming that the featured product has been added successfully.

## 4.3.2 Managing Featured Products

### Changing the order of products in a featured products list

You can change the order in which products appear in a featured products list on the storefront.

To change the order of products in a featured products list, do the following:

1. Go to the 'Categories Management' section of the Admin area (Management menu-

- >Categories).
- Browse to the category level where the featured products list is located (Instructions for [navigating the category tree](#) are available in the section [Managing Existing Categories](#)).
  - In the 'Featured products' dialog box, readjust the position numbers for the products in the list.

**Featured products**

Check all / Uncheck all

	PRODUCT NAME	POS.	ACTIVE
<input type="checkbox"/>	Javascript (Definitive Guide)	<input type="text" value="3"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Flash 5 for Windows and Macintosh	<input type="text" value="4"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	PATRICK Maracana HG Cleats	<input type="text" value="5"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Adobe Photoshop 5.5 Classroom	<input type="text" value="7"/>	<input checked="" type="checkbox"/>

---

**Add product**

- Click the **Update** button.

When you click on **Update**, the order of products in the featured products list changes. A message is displayed confirming that the featured products list has been updated successfully.

## Disabling/enabling featured products

You can disable featured products. Disabling a featured product is different from disabling a product: when you disable a featured product, it is removed from the current featured products list; it is not removed from any categories to which it is assigned, nor from any other featured products lists on any other pages.

To temporarily disable one or more products contained in a featured products list, do the following:

- Go to the 'Categories Management' section of the Admin area (Management menu->Categories).
- Browse to the category level where the featured products list is located (Instructions for [navigating the category tree](#) are available in the section [Managing Existing Categories](#)).

3. In the 'Featured products' dialog box, locate the featured products that you wish to disable and unselect the ACTIVE check box opposite their names.

4. Click the **Update** button.

When you click on **Update**, the selected products are removed from the featured products list on the storefront. A message is displayed confirming that the featured products list has been updated successfully.

To re-enable one or more previously disabled featured products, do the following:

1. Go to the 'Categories Management' section of the Admin area (Management menu->Categories).

2. Browse to the category level where the featured products list is located (Instructions for [navigating the category tree](#) are available in the section [Managing Existing Categories](#)).

3. In the 'Featured products' dialog box, locate the featured products that you wish to enable and select the ACTIVE check box opposite their names.

4. Click the **Update** button.

When you click on **Update**, the selected products re-appear in the featured products list on the storefront. A message is displayed confirming that the featured products list has been updated successfully.

## Deleting featured products

You can delete featured products. Deleting a featured product is different from deleting a product: when you delete a featured product, it is removed from the current featured products list; it is not removed from any categories to which it is assigned, nor from any other featured products lists on any other pages.

To delete one or more products from a featured products list, do the following:

1. Go to the 'Categories Management' section of the Admin area (Management menu->Categories).

2. Browse to the category level where the featured products list is located (Instructions for [navigating the category tree](#) are available in the section [Managing Existing Categories](#)).

3. In the 'Featured products' dialog box, locate the featured products that you wish to delete and select the check boxes to the left of their names.

3. Click the **Delete selected** button.

When you click on **Delete selected**, the selected products are removed from the featured products list. A message is displayed confirming that the selected featured products have been deleted successfully.

# 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 the section [User Memberships](#) for information on setting up and using memberships.
- See the section [Discounts](#) for information on creating and using discounts.
- Check out the section [Orders](#) for information on managing orders.
- See the section [Files](#) for information on managing files.
- See the section [Import/Export Procedures](#) for information on the procedures of importing and exporting data.
- Refer to the section [Store Statistics](#) for information on using statistical data gathered by X-Cart.

## 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,
  - export 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 Admin area (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. In the 'Profile details' dialog box define the details of the new user profile (See the section [Defining User Profile Details](#)).
4. Click the **Save** button.

After you click on **Save**, the user profile is 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.

**Note** (for users of X-Cart PRO only): After creating a provider profile, you can define a seller address for this provider (See [Defining a Provider's Seller Address](#)). If you wish, you can enable your store providers to define their own seller addresses by enabling the option 'Allow provider users to edit their Seller address' in General settings/General options.

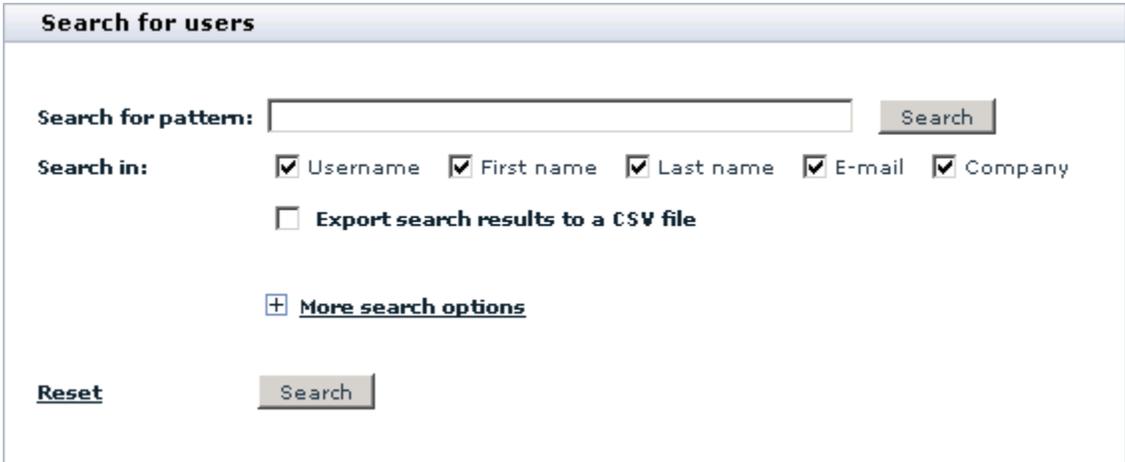
## 5.1.2 Managing User Profiles

### 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:



**Search for users**

Search for pattern:

Search in:  Username  First name  Last name  E-mail  Company

Export search results to a CSV file

[+ More search options](#)

[Reset](#)

(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 wish to immediately export the search results to a CSV file, select the 'Export search results to a CSV file' check box.

- 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 'More search options' enables you to be more specific in setting the parameters for your search. To expand the 'More search options' section, click on the **[+] More search options** link.

[-] **More 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 <input type="checkbox"/> Suspended by admin <input type="checkbox"/> Suspended automatically
<b>During the period:</b>	<input checked="" type="radio"/> This month <input type="radio"/> This week <input type="radio"/> Today <input type="radio"/> From <input type="text" value="November"/> <input type="text" value="24"/> <input type="text" value="2008"/> Through <input type="text" value="November"/> <input type="text" value="24"/> <input type="text" value="2008"/>

**Note:** Customer registration type is required if you search for customer usertype only.

**Reset**

It is not necessary to fill out all the fields in the 'More search options' section. Specify only the parameters relevant to your search. The more information you 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 administrators 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 Website address.
6. You can search for users who got registered, last logged in, suspended by the administrator or automatically during a certain period. Select 'Registered', 'Last logged in', 'Suspended by admin' or 'Suspended automatically', then specify the period (select 'This month', 'This week', 'Today' or 'From - Through' and set the dates)
7. Click the **Search** button.

### Search results

The search results are displayed in the 'Search results' form:

### Search results

[Search again](#)

[Check all](#) / [Uncheck all](#)

Username	Name / E-mail	Usertype	Last logged in
<input checked="" type="checkbox"/> <a href="#">admin</a>	<b>Admin Admin</b> / admin@example.com	Administrator	24-11-2008 15:40:54
<input type="checkbox"/> <a href="#">provider</a>	<b>Provider Provider</b> / provider@example.com	Provider (131 products)	21-11-2008 15:52:26
<input type="checkbox"/> <a href="#">customer</a>	<b>John Smith</b> / customer@example.com	Customer	21-11-2003 10:31:12

**Change of password on next log in should be required**

**Suspend/enable login for accounts**

**Disable/enable activity of accounts**  
(providers will not be able to sell their products, partners will not receive commissions)

of selected users   
  of all found users

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 logins, click on the LAST LOGGED IN column header).

**Note:** for 'user type' the sorting is done according to priority, not in the alphabetical order. For example as administrators have a higher priority, you can set decreasing sorting for user type to display all store administrators at the top of the list.

Clicking on the username or name link of a user allows you to modify his profile details.

The buttons below the list of found user profiles allow you to perform various operations on the found profiles: you can delete selected profiles, as well as export all or some of the found profiles to a CSV file. 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 also select to perform the following actions:

- To require users to change their passwords: select 'Change of password on next log in should be required'.
- To suspend/enable login: select 'suspend' or 'enable' from the drop-down list. Select 'do not change' to keep everything as is.
- To disable/enable activity: select 'disable' or 'enable' from the drop-down list. If you disable activity, providers will not be able to sell their products, partners will not receive commissions. Select 'do not change' to keep everything as is.

Using the corresponding radio buttons, specify if the selected actions should be applied only to selected users or to all found users. Click the **Apply** button.

### 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 area ('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.

**Note** (for users of X-Cart PRO only): When modifying a provider profile, you can add or edit the Seller

address for this provider. See [Defining a Provider's Seller Address](#).

4. Click the **Save** button.

To return to the list of user profiles, click [Go to users lists](#) link in the top right corner of the 'Profile details' dialog.

## Deleting user profiles

Every user can delete his own profile. The administrator can delete any profile.

To delete one or more user profiles:

1. Find the user profiles that need to be deleted.
2. In the 'Search results' form, select the check boxes next to these user profiles.
3. Click the **Delete selected** button. When prompted, confirm the deletion.

**Confirmation**

[Return to the search results](#) >

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.

- **test:** Customer  
**Ms. Jill Backer**  
Phone: phone / E-mail: jill\_backer79@hotmail.com  
Web site: n/a

<i>Shipping Address:</i>	<i>Billing Address:</i>
Test address, Test city, WI (Wisconsin) 54821, United States	Test address, Test city, WI (Wisconsin) 54821, United States

Warning: this operation cannot be reverted!

Are you sure you want to proceed? [Yes](#) > [No](#) >

After you confirm the deletion, the selected user profiles are removed.

## Exporting user profiles

You can export some or all of the user profiles from the search results to a CSV file.

To export specific user profiles from the search results to a CSV file:

1. In the 'Search results' dialog box, select the user profiles you wish to export (Select the respective check boxes).
2. Click the **Export selected** button. This opens your store's 'Export data' section.

3. Use the 'Export data' section to export the user profiles (See [Exporting Data](#)).

To export all the found user profiles from the search results to a CSV file:

1. In the 'Search results' dialog box, click the **Export all found** button. This opens your store's 'Export data' section.
2. Use the 'Export data' section to export the user profiles (See [Exporting Data](#)).

### 5.1.3 Defining User Profile Details

When you create a new profile or modify an existing profile, the details of the profile are defined in the 'Profile details' dialog box. This dialog box provides four sections: 'Personal information', 'Billing address' (an additional section 'Shipping address' appears, if you select the 'Ship to a different address' option), 'Contact information' and 'Username & password'. The instructions below explain how to complete each of these sections. After you provide all the necessary profile details in all the sections, be sure to click the **Save** button at the bottom of the 'Profile details' dialog box to save the changes.

### Profile details

#### Personal information

---

Title \*  ▾

First name \*

Last name \*

Company

Referred by Unknown

---

Account status:  ▾

Activity:  ▾

Require to change password on next log in

Allow this provider to use active content on product pages.

**Information** All information you provide to us will be kept confidential. We will never sell, exchange or market it in any way.

### Personal information

This section contains general personal information:

[Go to users lists](#) >

#### Personal information

---

Title \*  ▾

First name \*

Last name \*

Company

Referred by Unknown

- Title: The user's title.

- First name, Last name: The user's name.
- Company: The name of the user's company.
- Referred by: This field is completed automatically.

### Billing Address

Use this section to enter the billing address. If the shipping address must differ, select the 'Ship to a different address' option and enter the shipping address into the provided fields. If you leave the 'Ship to a different address' option unselected, billing address will be used as the shipping address as well.

**Billing Address**

---

Address \*

Address (line 2)

City \*

County \*

State \*

Country \*

Zip/Postal code \*

**Ship to a different address**

### Contact Information

Use this section to enter the user's phone number, e-mail, fax and website URL.

**Contact Information**

---

Phone \*

E-mail \*

Fax

Web site

## Username & Password

Use this section to assign memberships and control the account status and activity.

**Username & Password**

---

Signup for membership:

Membership:

Username: **provider**

Password \*:

Confirm Password \*:

Account status:

Activity:

Require to change password on next log in

Allow this provider to use active content on product pages.

- If you wish to assign some membership to the user whose profile you are editing, 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.

- Enter a username and a password.
- Account status: select *suspended* from the drop-down box to suspend the account. Select *enabled* to enable the account.
- Activity: select *disabled* from the drop-down box to disable the activity of the user. Select *enabled* to enable the activity.

- Require to change password on next log in: select this check box 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*).
- Allow this provider to use active content on product pages: (*available only in X-Cart PRO*) select this check box to enable the provider to use unfiltered HTML code, Javascript and validation Javascript code in Product Options. When this option is disabled, the provider is 'untrusted'. When such a provider imports or updates data, the following data from this provider will be filtered to exclude the possibility of an XSS attack:
  - product descriptions (including international descriptions);
  - extra fields values.
  - Product Configurator data
  - manufacturers data
  - special offer promo texts

An untrusted provider is also not allowed to use malformed HTML tags.

```
<ul>
  <li>
  <li><strong>32.00 General Credits</strong></li>
  <li>Which includes these credits:</li>

  <ul>
    <li><strong>6.00 Ethics Credits</strong></li>
  </ul>

</ul>
```

HTML Purifier will decline this code due to absence of end tag of <li> element and nested <ul> element.

When an untrusted provider imports data, all the HTML tags are excluded.

A validation Javascript field for Product Options is not displayed to untrusted providers.

In case the data have already been entered or modified by the admin, and the option 'Allow this provider to use active content on product pages' is disabled (the provider becomes untrusted), data/values of the fields defined above will be filtered before being displayed in the customer area.

**Important!** Enabling/disabling the 'Allow this provider to use active content on product pages' option does not change the data in the products of the providers. Only the provider profile is changed.

For detailed information about this functionality, read the section ['Using Active Content \(X-Cart PRO\)'](#) in this manual.

## 5.1.4 Defining a Provider's Seller Address (X-Cart PRO)

You can define a seller address for each of the providers in your store. A provider's seller address is an address that will be used by online real-time shipping rate calculation services to calculate shipping rates for orders shipped from this provider.

To define a seller address for a provider, do the following:

1. Click the [Seller address](#) link above the 'Profile details' dialog box. This displays the 'Seller address' form:

**Seller address**

This address will be used for shipping rate calculations by real-time shipping services.

Address

Address (line 2)

City \*

State \*

Country \*

Zip/Postal code \*

This address will be used for shipping rate calculations by real-time shipping services. Make sure this address is in the country **United States**.

2. Enter the desired address into the fields of the 'Seller address' form. The country of the seller address must be the same as the country specified in the 'Company country' field of the company location address (See the section 'Company location address' in General settings/Company options).
3. If your store is using real-time shipping calculation via the API provided by DHL (the option 'Enable real-time shipping calculation' in General settings/Shipping options is enabled and any of the DHL shipping methods are 'active'), you will see that the 'Seller address' form also contains a section

for DHL account information:

### Seller address

This address will be used for shipping rate calculations by real-time shipping services.

Address

Address (line 2)

City \*

State \*

Country \*

Zip/Postal code \*

This address will be used for shipping rate calculations by real-time shipping services. Make sure this address is in the country **United States**.

---

### DHL account

DHL/Airborne API System ID:

DHL/Airborne API password:

DHL/Airborne Account Number:

DHL/Airborne Shipping key for shipments within the U.S.:

DHL/Airborne Shipping key for shipments from the U.S. to other countries:

**Note:** The store is using real-time shipping rate calculation via the API provided by DHL. If you wish your own DHL account to be used when calculating the cost of shipping by DHL for products shipped from your seller address, enter the credentials for access to this account here. If you choose not to specify your DHL account details on this page, real-time shipping calculation for the DHL orders shipped from your seller address will be performed using the DHL account specified by the store administrator.

Please note that if your seller address is different from the address stored on file at DHL for the account used for DHL real-time shipping calculation, tracking of shipments by sender account number will not be possible.

This section can be used to specify a DHL account different from the one specified on the General settings/Shipping options page.

If you wish to use the DHL account specified on the General settings/Shipping options page for this provider, leave the fields in the 'DHL account' section of the 'Seller address' form empty.

If you wish to use a separate DHL account for this provider, complete the 'DHL account' section providing the credentials for access to this account.

Please note that if the seller address is different from the address stored on file at DHL for the account

used for DHL real-time shipping calculation, tracking of shipments by sender account number will not be possible.

4. Click the **Save** button.

## 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 the respective X-Cart areas.

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 area 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 administrator 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 administrator 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 classifying users with administrator and provider privileges.

Administrator and provider memberships can be assigned to users only by administrators.

Depending on the value of the option 'Enable 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 'Enable 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 'Enable 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 administrator).
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 administrator).
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 administrator) and select the check box next to it.
3. Click the **Delete selected** button. The membership level should be removed.

## 5.3 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 the administrator,
  - print order invoices and shipping labels,
  - export orders.

- You cannot delete any orders.

## 5.3.1 X-Cart Order Statuses

### Statuses of orders paid for by offline payment methods

When a customer chooses to pay for an order using an offline payment method (a payment method that requires manual processing of payment by the store administrator), the order is created with the status *Queued*. This is the initial status indicating that the order has been created in the store's database and is waiting to be processed by the store administrator.

After an order has been placed with the status *Queued*, the store administrator must process it: arrange for the payment to be received from the customer and ensure that the order is packed and shipped to the customer. Typically, each store processes orders according to its own workflow. The store administrator can track the stages of the process in X-Cart by manually updating the status of the order at each order processing stage. The following order statuses can be used:

- *Processed* - The status indicating that the payment has been received by the store.
- *Complete* - The status indicating that all work on the order has been completed. For example, this status can be assigned to an order by the store administrator or (in X-Cart PRO) by the product provider after the order has been shipped.
- *Declined* - The status indicating that the order has been canceled by the store administrator. For example, this status may be used when an order is found to be fraudulent.
- *Backordered* - The status indicating back orders. It can be manually assigned to orders containing products that are temporary out of stock.
- *Failed* - The status indicating that the payment transaction has not been completed successfully.

### Statuses of orders paid for by online payment methods

When a customer chooses to pay for an order using an online payment method, the order is created with the status *Not finished*. This is the initial status indicating that the order has been created in the store's database, but a response from the online payment processor has not been received yet; the transaction is neither successful nor failed.

After the order has been placed, the online payment processor processes the payment and exchanges information about the status of the payment transaction with X-Cart. X-Cart interprets the information received from the payment processor and automatically updates the order's status. The following statuses

may occur:

- *Queued* - The status indicating that the online payment processor has returned a temporary status indicating waiting (for example, an order processed through PayPal may get the status 'Queued' when PayPal returns 'Pending' status).
- *Processed* - The status indicating that the payment has been successfully processed by the online payment processor and the amount corresponding to the order total has been received by the store.
- *Pre-Authorized* - The status indicating that the amount corresponding to the order total has been successfully authorized; this status occurs only in orders paid for using a payment method working in 'Auth only' mode.
- *Failed* - The status indicating that payment processing has failed.

Orders that receive the status *Pre-Authorized* require further manual processing by the store administrator: the store administrator must either capture the amount for which authorization was issued or void the transaction. If he or she performs the 'capture' action and the payment is captured successfully, the status of the order is updated to *Processed*. If he or she performs the 'void' action, the authorization is voided and the order status is updated to *Declined*. If the store administrator fails to capture or void the authorization within the time limit defined by the payment processor, X-Cart updates the order status to *Declined* automatically.

Please note that the statuses *Complete* and *Backordered* are not assigned to orders paid for by online payment methods automatically. If you wish to use these statuses for orders, you can assign them manually.

## 5.3.2 Managing Orders

### Finding orders

X-Cart allows you to search for orders contained in the store's 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

From:

To:

**Export search results to a CSV file**

**More search options**

[Reset filter](#)

and advanced search (accessible by clicking the **[+] More search options** link):

**More search options**

**Order id:**  -

**Order total (\$):**  -

**Payment method:**

**Delivery method:**

**Order status:**

**Provider:**

**Order features:**

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.

**Search for pattern:**

**Search in:**  Product title  Options

**SKU:**

**Product ID#:**

**Price (\$):**  -

**Customer:**

**Search in:**  Username  First name  Last name

**Company:**

**Search by address:**  Ignore address  Billing  Shipping  Both

**City:**

**State:**

**Country:**

**Zip/Postal code:**

**Phone/Fax:**

**E-mail:**

[Reset filter](#)

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 adjust the 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. 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 provide the following information:

- 'Order id' - Range of order IDs that needs to be found. You need to specify the initial and the final IDs 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 that 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' - Payment method used for the order(s). The 'Payment method' drop-down box contains only those payment methods that have actually been used for orders in your store.
- 'Delivery method' - Shipping method used for the order(s). The 'Delivery method' drop-down box contains only those shipping methods that have actually been used for orders in your store.
- 'Order status' - Order's status (*Not finished, Queued, Processed, Pre-Authorized, Backordered, Declined, Failed or Complete*).
- 'Provider' - The provider whose products are contained in the order(s).
- 'Order features' - Features describing the order(s). To select multiple features, hold down the 'Ctrl' key while clicking the names of features with your mouse.
- '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 substring 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(s).
  - 'Product ID #' - ID of the product contained in the order(s).
  - 'Price' - Price range that includes the price of the product contained in the order(s).
  - '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*' - Whether the customer's address must be used and the type of this address.
    - 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.

After you click on **Search**, X-Cart searches for the order(s) in the database and outputs a list of search results in a dialog box titled 'Search results':

**Search results**

[Search again](#) >

[Check all](#) / [Uncheck all](#)

<input type="checkbox"/>	#	Status	Customer	Provider	Date	Total
<input type="checkbox"/>	<a href="#">#1032</a>	Queued	<a href="#">John Smith (customer)</a>	provider	<a href="#">09-12-2008 09:29:06</a>	<a href="#">\$1374.08</a>
<input type="checkbox"/>	<a href="#">#1031</a>	Queued	<a href="#">John Smith (customer)</a>	provider	<a href="#">09-12-2008 09:28:56</a>	<a href="#">\$687.04</a>
<input type="checkbox"/>	<a href="#">#1023</a>	Complete	John Smith (anonymous1) <b>deleted</b>	provider	<a href="#">09-12-2008 09:20:56</a>	<a href="#">\$46.19</a>
<input type="checkbox"/>	<a href="#">#1022</a>	Queued	John Smith (anonymous1) <b>deleted</b>	provider	<a href="#">09-12-2008 09:20:46</a>	<a href="#">\$687.04</a>

Gross total: **\$2794.35**  
Total paid: **\$46.19**

---

**Export orders**

Click on the button below to export all the orders found by this search query.

File format for export:

For each of the found orders, the 'Search results' dialog box provides the following details:

- # - The order ID.
- STATUS - The current status of the order.
- CUSTOMER - The full name and username of the customer who placed the order. For registered customers, the name and username represent a link that can be used to view the customer's user profile. For customers whose user profile has been deleted no link is provided; such customers are marked in the order search results as 'deleted'.
- PROVIDER (the column is visible only to store administrators) - The username of the provider who is the owner of the products contained in the order.
- DATE - The date on which the order was placed.
- TOTAL - The 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 administrator and X-Cart GOLD administrator/provider users* can update order statuses and delete selected orders.
- *all users (X-Cart PRO administrator, X-Cart PRO provider and X-Cart GOLD administrator/provider)* can print invoices and shipping labels for selected orders and export orders.

X-Cart retains the parameters you define for an order 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 that you do not need for your new search, you can quickly clear this section by clicking the '[Reset filter](#)' link at the bottom of the 'Search for orders' form.

## Updating order statuses

Users with administrator privileges (X-Cart GOLD and PRO) can change the statuses of orders displayed as a list in the 'Search results' dialog box.

To change the status(es) of one or more orders, do the following:

1. Find the orders whose statuses need to be changed.
2. In the 'Search results', re-adjust the STATUS drop-down boxes opposite these orders.
3. Click the **Update status** button.

**Note:** This method cannot be used to change the status of an order to 'Pre-Authorized', because this status cannot be assigned to orders manually. An order can receive the status 'Pre-Authorized' only if the payment processor by which the order was paid for successfully authorizes the transaction. Also, this method cannot be used to change the 'Pre-Authorized' status of an order to a different status. To change the order status to 'Processed' or 'Declined', you must use the buttons Capture or Decline on the 'Order details' page (See the section [Processing a Pre-Authorized order](#) below).

## 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 opens the 'Order details' page with all the information about the order:

**Order details**  
**Order #1032** [Go to orders lists](#) >  
Date: 20-11-2008 16:36:51  
<< [Order #1031](#)  
[Print order](#) > [Print invoice](#) >  
**Products info**  

---

**#144. Nikon Coolpix 880**

SKU	SKU144
Provider	provider
Price	\$680.00
Quantity	2 item(s)

[View mode](#) [Edit mode](#)

```
action : place_order
Ship to: John Smith
Customer Notes : I admired to get this camera long time ago.
```

Order notes (not visible to customer):

[Apply changes](#)

By clicking on this button you apply the changes made to the order details. The customer is immediately informed by e-mail.

The 'Order details' page provides the following information:

- 'Products information' section: Information about the products contained in the order.
- 'Order information' section: Payment method and shipping method selected for the order, order subtotal amount, discounts applied, shipping cost, order total amount.
- 'Customer info' section: Information about the customer who placed the order.
- 'Customer notes' field: Notes entered by the customer at the time of order placement.
- 'Status' field: Order status.
- 'Tracking number' field: Order tracking number.
- 'Order details (not visible to customer and provider)' section: Notes about the order that are visible only to the store administrator. For orders paid for using an online payment method, this section also contains a link titled '[Payment gateway log](#)'. Clicking on this link allows you to view information about this order that was received from the payment processor.
- 'Order notes (not visible to customer)' section: Notes about the order that are visible only to the store administrator and (in X-Cart PRO version) product providers.

To go back from the 'Order details' page to the orders list, you can use the link [Go to orders list](#) at the top.

## Editing order details

### Updating the status of an order

The status of an order opened for viewing can be updated directly from the 'Order details' page.

*Administrator users:*

If the order is in a status other than *Pre-Authorized*, you can change its status as follows:

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.

When you click on **Apply changes**, the order status changes to the status you selected.

*Provider users:*

You can assign the status *Complete* to orders that have been successfully processed and now have the status *Processed*: Click the **Complete order** button at the bottom of the 'Order details' form. The order status changes to *Complete*.

### Processing a Pre-Authorized order

If the order is in *Pre-Authorized* status, you can either capture the authorized amount or void the authorization.

For PayPal, Authorize.Net, LinkPoint, Sage Pay VSP Direct or NetRegistry e-commerce orders, you can do this using the buttons below the 'Order details' field:

- To perform the 'capture' action, click the button **Capture**.
- To perform the 'void' action, click the button **Decline**.

After the action chosen by you is successfully completed, the status of the order is automatically updated to *Processed* or *Declined*, respectively.

For VirtualMerchant orders, the ability to perform the 'capture' and 'void' actions from X-Cart's interface is not supported (the buttons **Capture** and **Decline** are not displayed); however, you can perform these actions using your VirtualMerchant account backoffice.

### Editing customer notes

If necessary, you can edit customer notes stored with an order.

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.

### 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 customer)' text area.
2. Type your notes into this text area.
3. Click the **Apply changes** button.

### Editing the 'Order details' field of an order

Administrator users can edit the contents of the 'Order details' field of orders.

To edit the contents of the 'Order details' field, do the following:

1. On the 'Order details' page, find the section 'Order details (not visible to customer and provider)'. In this section, you should see a field containing the order details.

2. To start editing the contents of this field, click the [Edit mode](#) link at the top right-hand corner of the field. This enables Edit mode.
3. Edit the contents of the 'Order details (not visible to customer and provider)' field.
4. Click the **Apply changes** button. This turns off the Edit mode and saves 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 (administrator 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 creates a set of orders for exporting via X-Cart's 'Import/Export' section.

If you have chosen any format other than *standard*, you are 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 selected** button.

If you have chosen to export orders in the *standard* format, X-Cart creates a set of orders for exporting via X-Cart's 'Import/Export' section.

If you have chosen any format other than *standard*, you are offered to save the results of order export on your local computer in the form of a CSV or IIF file.

## Deleting orders

X-Cart allows administrator 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. When prompted, confirm the deletion:

**Confirmation**

[Go Back](#) >

Do you really want to remove the orders:

You have **4** orders in your store that will be deleted.

Warning: this operation cannot be reverted!

Are you sure you want to proceed? [Yes](#) > [No](#) >

After you confirm the deletion, the orders are deleted.

To delete 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. When prompted, confirm the deletion:

**Confirmation**

[Return to the search results](#) >

Do you really want to remove the orders:

- **Order #3 - \$12.95**  
Date: 03-02-2006  
Status: Queued  
Provider: provider
- **Order #4 - \$41.95**  
Date: 03-02-2006  
Status: Declined  
Provider: master

Warning: this operation cannot be reverted!

Are you sure you want to proceed? [Yes](#) > [No](#) >

After you confirm the deletion, the orders are deleted.

## 5.4 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.

## 5.4.1 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			
<b>Add new discount</b>			
<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="Percent, %"/>	<input type="text" value="All"/>
<input type="button" value="Add"/>			

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 the **Add/Update** button. The discount is added to the list of available purchase discounts in the upper part of the dialog box.

	ORDER SUBTOTAL	DISCOUNT	DISCOUNT TYPE	MEMBERSHIP
<input type="checkbox"/>	1000.00	5.00	Percent, %	All Premium Wholesale

Buttons: Delete selected, Update

---

**Add new discount**

<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	Percent, %	All Premium Wholesale
-----------------------------------	-----------------------------------	------------	-----------------------------

Button: Add

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.

## 5.4.2 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.

## 5.5 Files

### Files in X-Cart

X-Cart provides a repository where the store staff can keep files; for example, the files of downloadable products (like software or e-books). The store staff can view and manage the contents of this repository using X-Cart's built-in file manager.

In X-Cart GOLD, the files repository corresponds to the directory `/xcart/files`, where `/xcart` is X-Cart installation directory. This repository is a common file storage space accessible equally to all of the store users with administrator/provider privileges.

In X-Cart PRO, the files repository also corresponds to the directory `/xcart/files`; however, only users with unlimited administrator privileges have the ability to view and manage the contents of this repository in its entirety. For each of the store provider, a separate area is established within the repository beyond which they cannot access. This area corresponds to the directory `/xcart/files/provider_login`, where `/xcart` is X-Cart installation directory, and `provider_login` is the login name of the respective store provider.

### Roles in file management

*If you are an X-Cart GOLD administrator/provider or an X-Cart PRO administrator, you can perform the following tasks using X-Cart's file manager:*

- you can view the contents of the store's files repository `/xcart/files` (See [Viewing the Contents of the Files Repository](#)).

- you can manage the contents of the store's files repository `/xcart/files` (See [Managing the Contents of the Files Repository](#)).

*If you are an X-Cart PRO provider:*

- you can view the contents of your area in the store's files repository `/xcart/files/provider_login` (See [Viewing the Contents of the Files Repository](#)).
- you can manage the contents of your area in the store's files repository `/xcart/files/provider_login` (See [Managing the Contents of the Files Repository](#)).

## 5.5.1 Viewing the Contents of the Files Repository

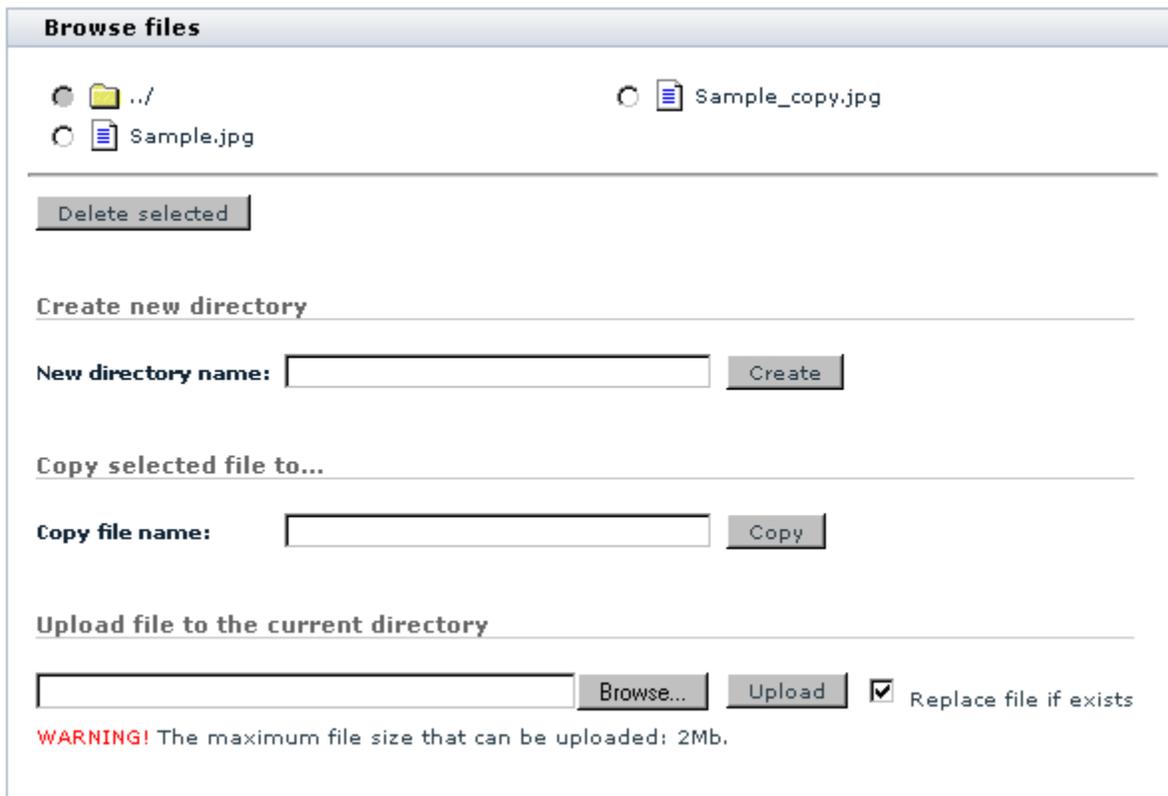
Depending on the role you perform in the store, you can view the contents of either the store's entire files repository or of your personal area within that repository.

To view the contents of the files repository / your files repository area, do the following:

1. Open X-Cart's file manager:

- If you are an X-Cart GOLD administrator/provider or an X-Cart PRO administrator: Click on Files in the Administration menu.
- If you are an X-Cart PRO provider: Click on Files in the Inventory menu.

You should see a dialog box titled 'Browse files'.



**Browse files**

../  
Sample.jpg

Sample\_copy.jpg

Delete selected

Create new directory

New directory name:  Create

Copy selected file to...

Copy file name:  Copy

Upload file to the current directory

Browse... Upload  Replace file if exists

**WARNING!** The maximum file size that can be uploaded: 2Mb.

This is the file manager.

2. At the top of the 'Browse files' dialog box, you should see the contents of the files repository / your files repository area.

The top section of the 'Browse files' dialog box is a file browser, you can use it for navigation.

## 5.5.2 Managing the Contents of the Files Repository

Depending on the role you perform in the store, you can manage the contents of either the store's entire files repository or of your personal area within that repository.

### Creating directories in the files repository / your files repository area

You can create directories in the files repository / your files repository area.

To create a directory, do the following:

1. Open X-Cart's file manager.
2. Use the file browser at the top of the 'Browse files' dialog box to navigate to the location where you

wish to create the new directory.

3. Into the field 'New directory name', enter the desired directory name.
4. Click the **Create** button.

When you click on **Create**, the directory is created at the current location. A message is displayed confirming that the directory has been created successfully.

## Deleting directories from the files repository / your files repository area

You can delete the directories you no longer need. Deleting a directory deletes all the files and sub-directories under that directory.

To delete a directory:

1. Open X-Cart's file manager.
2. Use the file browser at the top of the 'Browse files' dialog box to locate the directory you wish to delete.
3. Select the radio button next to the name of this directory.
4. Click the **Delete selected** button. When prompted, confirm the deletion.

When you confirm the deletion, the selected directory is deleted. A message is displayed confirming that the selected directory has been deleted successfully.

## Uploading files to the files repository / your files repository area

You can upload files to the files repository / your files repository area from your local computer.

To upload a file:

1. Open X-Cart's file manager.
2. Use the file browser at the top of the 'Browse files' dialog box to navigate to the location to which you wish to upload a file.
3. Use the 'Upload file to the current directory' section of the 'Browse file' dialog box to select the file that you wish to be uploaded.
4. If you are uploading the file in order to replace its older version residing in the current directory, select the 'Replace file if exists' check box.
5. Click the **Upload** button.

When you click on **Upload**, the file is uploaded to the current directory. A message is displayed

confirming that the selected file has been uploaded successfully.

## Creating copies of files stored in the files repository / your files repository area

You can create copies of files stored in the files repository / your files repository area.

To create a copy of a file:

1. Open X-Cart's file manager.
2. Use the file browser at the top of the 'Browse files' dialog box to 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 the **Copy** button.

When you click on **Copy**, the file copy is created. A message is displayed confirming that the file has been copied successfully.

## Deleting files from the files repository / your files repository area

You can delete files stored in the files repository / your files repository area.

To delete a file:

1. Open X-Cart's file manager.
2. Use the file browser at the top of the 'Browse files' dialog box to locate the file you wish to delete.
3. Select the radio button next to the name of this file.
4. Click the **Delete selected** button. When prompted, confirm the deletion.

When you confirm the deletion, the selected file is deleted. A message is displayed confirming that the selected file has been deleted successfully.

# 5.6 Import/Export Procedures

## Import/Export procedures in X-Cart

X-Cart 4.2.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 v4.2.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).

## 5.6.1 Exporting Data

Export of X-Cart data can be performed using the 'Export data' section of your store's back end.

To access this section:

1. Go to the 'Import/export data' section of your store's 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**

---

Select the provider's username here. This is required if you are going to export provider related data such as products, destination zones, tax rates etc.

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	1 Change / Remove data range
<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 filename 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.

## 5.6.2 Importing Data

Import of X-Cart data can be performed using the 'Import data' section of your store's back end.

To access this section:

1. Go to the 'Import/export data' section of your store's 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

Select the provider's username here. This is required if you are going to import provider related data such as products, destination zones, tax rates etc.

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.:  
/home/user/public\_html/xcart/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) are not displayed and 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 import process is completed, you should see an Information box with a confirmation message.

## 5.7 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 Admin are (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.

### 5.7.1 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 Admin area (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:

<b>Total statistics</b>	
<b>TOTAL STATISTICS</b>	
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
<b>GENERAL STATISTICS FOR PERIOD: 01-06-2004 00:00:00 - 15-06-2004 12:19:12</b>	
New customers	1
New providers	0
New products	0
New orders	3

## 5.7.2 Log-in History

The 'Log-in history' section allows you to get information about the users that logged in to 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 Admin area (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:

Login history					
DATE	LOGIN	USERTYPE	ACTION	IP	STATUS
15-06-2004 15:11:51	customer	C	login	192.168.10.66	success
15-06-2004 15:12:09	admin	A	logout	192.168.10.66	success
15-06-2004 15:12:16	admin	A	login	192.168.10.66	success
15-06-2004 15:12:59	customer	C	logout	192.168.10.66	success
15-06-2004 15:13:09	customer	C	login	192.168.10.66	failure

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.

### 5.7.3 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 Admin area (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 environment 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.

## 5.7.4 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 Admin are (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		
Check all / Uncheck all		
	SEARCH STRING	DATE
<input type="checkbox"/>	design	Jun 15, 2004 20:02:20
<input type="checkbox"/>	web	Jun 15, 2004 19:51:53

Delete selected

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.

# 6 Optimizing Your Store for Search Engines

This section provides information on ways to optimize your X-Cart based store for search engines.

- Study the section [Using Clean URLs](#) to learn how you can enable your store to use search engine friendly page URLs.
- Check out the section [Using Page Title and Meta Tags](#) for information on how you can adjust the keywords, description and title meta tags for your store's pages to try to improve your store site's ranking with search engines.

Please note that X-Cart's HTML Catalog feature, whose main purpose is to improve your store's performance, also contributes to making your store site search engine friendly. For information on using this feature, see the section [Using the HTML Catalog Feature](#).

## 6.1 Using Clean URLs

### Clean URLs in X-Cart

Pages of X-Cart based stores are generated dynamically, which means, their URLs are also dynamic: each page URL is formed from a query to the store's database and contains a query string. For example, a typical product page URL in X-Cart looks like the following: `http://www.example.com/xcart/product.php?productid=16133`.

Dynamic URLs containing query strings pose a problem for SEO, because they stop many search engines from indexing the pages in which they are used. They are also not user friendly for your site's human visitors (difficult to read and remember).

X-Cart provides a feature that allows you to solve the problem of dynamic URLs: the so-called "Clean" URLs. Clean URLs are custom SEO-friendly URLs that are used instead of the original dynamic ones. For a product page, a clean URL could look something like this: `http://www.example.com/xcart/Product-Name.html`.

In your store, clean URLs can be defined for the pages of such objects as products, categories, manufacturers and embedded static pages.

After a clean URL is defined for an object, your store's visitors will be able to access the page of this object by using the clean URL. Also, all the links in your store pointing to the page of this object will point to the

page's clean URL, not the dynamic URL.

At present, X-Cart's Clean URLs feature works only for Apache web servers with the module `mod_rewrite` enabled. The supported versions are Apache v1.3, Apache v2.0 and Apache v2.2.

## Roles in Clean URLs management

If you are an X-Cart GOLD administrator/provider or an X-Cart PRO administrator:

- You can enable and configure Clean URLs in your store (See [Enabling Clean URLs](#)).
- When the Clean URLs feature is enabled in your store, you can define clean URL values for any products, categories, manufacturers and embedded static pages in your store (See [Defining Clean URL Values](#)).

If you are an X-Cart PRO provider:

- When the Clean URLs feature is enabled in your store, you can define clean URL values for the products you own (See [Defining Clean URL Values](#)).

**Important notice for all roles:**

- In some cases, clean URL values in your store may be generated automatically (See [Automatic Generation of Clean URL Values](#)).

### 6.1.1 Enabling Clean URLs

By default, the Clean URLs feature is disabled in X-Cart. To enable Clean URLs in your store, follow the procedure below:

1. Ensure that the following minimum requirements are met:
  - Your store site is powered by Apache web server.
  - The Apache web server has the module `mod_rewrite` configured and enabled.
2. Back up the `.htaccess` file located in your X-Cart installation directory.

The `.htaccess` file located in your X-Cart installation directory will need to be edited to insert the required configuration directives. On some servers, because of the specific server configuration, inserting the said directives into your `.htaccess` file may render your store site inaccessible to users - even if the insertion has been performed correctly. To be on the safe side, you should make a backup copy of the `.htaccess` file prior to inserting the directives, so the original `.htaccess` file can be restored if anything goes wrong. For the same reason, we recommend you perform the editing of your `.htaccess`

file at the time of least activity on your store site.

3. Edit the .htaccess file located in your X-Cart installation directory to insert the required configuration directives:

a) Open the .htaccess file in a plain text editor.

b) In your store's Admin area, go to the section 'General settings/SEO options' and find a block of lines generated by X-Cart that looks like the following:

At present, X-Cart's Clean URLs functionality works only for Apache web servers with the module mod\_rewrite enabled. By default, this functionality is disabled in X-Cart. If your store's site is powered by Apache web server that has the Apache mod\_rewrite module configured and enabled, you can enable usage of clean URLs in your store as follows:

1. Edit the file /u/user/public\_html/.htaccess to insert the following lines:

```
# Clean URLs [[[
Options +FollowSymLinks -MultiViews -Indexes

RewriteEngine On
RewriteBase /~user/
RewriteCond *(REQUEST_URI) !~/~user/(payment|admin|provider|partner)/
RewriteCond *(REQUEST_FILENAME) !\.(gif|jpe?g|png|js|css|swf|php|ico)$
RewriteCond *(REQUEST_FILENAME) !-f
RewriteCond *(REQUEST_FILENAME) !-d
RewriteCond *(REQUEST_FILENAME) !-l
RewriteRule ^(.*)$ dispatcher.php [L]

# /Clean URLs ]]]
```

Warning: In rare cases, because of the specific configuration of your server, inserting the above lines into your .htaccess file may render your store site inaccessible to users. For this reason, we recommend that before editing .htaccess you make a backup copy of the original .htaccess file so it can be restored if anything goes wrong. We also recommend you experiment with your .htaccess file at the time of least activity on your store site, or close the store for visitors before you make any changes to .htaccess.

c) Copy the entire block.

d) In the plain text editor, paste the block you have copied at the end of the .htaccess file.

e) Save the .htaccess file.

4. After inserting the required configuration directives into your .htaccess file, try to open X-Cart's home page. If you do not see any error messages returned by the server, all is well, and you can proceed to the next step. If you see error messages, restore the original .htaccess file from backup and contact your hosting provider about the problems you are having with the functionality of Apache's mod\_rewrite module (Send them the lines you have tried to insert into your .htaccess file).

5. Run a basic test to see whether the Clean URLs functionality can work at your store.

In your web browser, open the page <Your\_store\_URL>/clean-url-test. Requesting this page will launch an automated test of the Clean URLs functionality. When the page opens, you should see an

only message:

*'Clean URLs system test completed successfully.'*

If you see this message, it means that the test has been completed successfully, and you can proceed to the next step. If, instead of the above message, you see any error messages, contact X-Cart's support team for assistance.

3. In the 'Clean URL' options section of the 'General settings/SEO options' page, enable the option 'Enable Clean URLs'.
4. Click the **Save** button at the bottom of the page.

When you click on **Save**, the Clean URLs functionality in your store is enabled. Now X-Cart can use search engine friendly URLs for your product, category, manufacturer and embedded static pages.

After you have enabled Clean URLs in your store, you should check out the 'Clean URL options' section of the 'General settings/SEO options' page and set up the Clean URLs preferences for your store. For details, see the section [SEO Options](#) in the 'General settings' chapter of this manual.

## 6.1.2 Defining Clean URL Values

When the Clean URLs feature in your store is enabled, you can define clean URL values for any objects (products, categories, manufacturers and embedded static pages) which you can manage according to the role you perform in the store.

Clean URL values can be defined manually (for all types of objects) or through import (only for categories and products).

### Defining clean URL values manually

The clean URL value for any object can be defined manually through the 'Clean URL' field on the object's Details page.

To define the clean URL value for an object, go the Details page of this object and use the 'Clean URL' field to enter a string of characters that you wish to be used as the object's clean URL. The value entered into the 'Clean URL' field must be unique within your store and must not be used as a path to any actual file located in your X-Cart installation directory. The maximum allowed length for a clean URL value is 255 characters. Allowed are alphanumeric characters (A-Z, a-z, 0-9), slash (/), dot (.), hyphen (-) and underscore (\_).

**Important:** When defining a clean URL value, do not use spaces, and do not include slashes at the

beginning or at the end. Also, do not include the web path to your store's directory, or any extensions, like ".html" (Extensions are set separately for each type of pages using the 'Clean URL extension for <page type> pages' option group in the 'General settings/SEO options' section).

Please note that, after the object's name is entered on the Details page, X-Cart offers a clean URL value suggestion for the 'Clean URL' field. This suggestion is, in fact, the value entered into the object's name field, in which all unallowed characters are replaced by hyphens. The suggestion of a clean URL value is offered solely for your convenience; you can accept it, or replace it by a value of your own.

At any moment, you can re-define the clean URL value previously defined for an object. To accomplish this, you must edit the contents of the 'Clean URL' field on the object's Details page.

**Note:** When you re-define an object's clean URL value, you can specify whether its previous clean URL value should be saved to the Clean URL history. For information on Clean URL history, see the section [Using Clean URL History](#).

## Defining clean URL values through import

When product or category data is imported into your store from a CSV file, the field CLEAN\_URL can be used to import clean URL values. The format requirements for the CLEAN\_URL field are exactly the same as for the field 'Clean URL' on the Details page (see [above](#)).

As a result of import, clean URL values are added/updated for all the products and categories for which a clean URL value is provided in the CLEAN\_URL field. For the products and categories, for which the CLEAN\_URL field is empty, clean URL values are generated automatically (See [Automatic Generation of Clean URL Values](#)).

### 6.1.3 Using Clean URL History

After the page of a certain object becomes available to visitors via a clean URL, some visitors may bookmark it so it can be found later. If, after that, you change the object's clean URL value, the bookmark will no longer work.

X-Cart addresses this issue by allowing you to keep a Clean URL history for each of the objects that have a clean URL. A clean URL history is a history of clean URL changes for the object. It stores a list of the object's most recent clean URL values.

When you use the Clean URL history feature, you can change the clean URL value for any object without the risk that for the visitors who have bookmarked the page of this object the bookmark will become invalid: as long as the clean URL value used by the bookmark is stored in the object's Clean URL history, the

bookmark will remain fully functional. This works as follows: When a user accesses a page in your store using an outdated clean URL, which is stored in the Clean URL history, they are redirected (with the "HTTP/1.1 301 Moved Permanently" status code) to the page of your store for which this clean URL was used before.

The number of clean URL values that can be stored in the Clean URL history of any object can be set using the option 'Maximum number of URLs that can be stored in the Clean URLs history for one page' on the 'General settings/SEO options' page.

You have full control over what clean URL values are saved to the Clean URL history. If you change the clean URL value for a specific object, and you wish to save the previous clean URL value of this object to the object's Clean URL history, select the check box 'Save the old value in the Clean URL history if the new value is different' located below the 'Clean URL' field on the object's Details page. When the form with the object's details is submitted, the new clean URL value will be saved, whereas the old one will be added to the object's Clean URL history.

**Note:** If you do not wish to save the old clean URL value to the object's Clean URL history, simply do not select the 'Save the old value in the Clean URL history if the new value is different' check box before saving the object's details.

After at least one clean URL value is added to the Clean URL history of an object, a dialog box titled 'Clean URL history' appears below the form with the object's details:



Clean URL history	
<a href="#">Check all / Uncheck all</a>	
<input type="checkbox"/>	Clean URL value
<input type="checkbox"/>	old_clean_url
<input type="button" value="Delete selected"/>	

This dialog box allows you to view and manage the contents of the object's Clean URL history. You can access this dialog box at any time simply by scrolling down the page with the object's details.

Sometimes you may want to remove certain clean URL values from the Clean URL history of an object (for example, you may want to remove mistyped clean URL values, or clean URL values entered into the history by mistake).

To remove one or more clean URL values from the Clean URL history, do the following:

1. In the 'Clean URL history' dialog box, find the clean URL values that you wish to be removed and mark them for deletion by selecting the respective check boxes.

2. Click the **Delete selected** button.

When you click on **Delete selected**, the selected clean URL values are removed from the Clean URL history. A message is displayed confirming that the selected clean URL values have been removed successfully.

## 6.1.4 Automatic Generation of Clean URL Values

In some cases, generation of clean URL values in X-Cart is performed automatically.

Automatic generation of clean URL values takes place in the following cases:

- when a new object is created in a store with the Clean URLs feature disabled (See the section [Automatic generation of clean URL values with the Clean URLs feature disabled](#));
- when a product is created by cloning (See the section [Automatic generation of clean URL values as a result of product cloning](#));
- when a provider creates a manufacturer in a store based on X-Cart PRO not using Simple Mode (See the section [Automatic generation of clean URL values for manufacturers created by providers in X-Cart PRO when Simple Mode is off](#));
- when products or categories are imported from a CSV file with no clean URL values in the CLEAN\_URL field (See the section [Automatic generation of clean URL values during the import of products and categories](#));
- when X-Cart's automatic generator tool is used to generate clean URLs (See the section [Automatic generation of clean URL values by X-Cart's clean URL generator](#)).

In all the above named cases, the automatic generation of clean URL values is performed in exactly the same way (See the section [How automatic generation of clean URL values is performed](#)).

### Automatic generation of clean URL values with the Clean URLs feature disabled

While the Clean URLs feature is disabled in your store, clean URL values for all the objects being created are generated automatically. This is done so that if the Clean URLs feature becomes enabled, each of the objects in the store would already have a clean URL.

Automatic generation of clean URL values with the Clean URLs feature disabled works as follows: When you start creating a new object, the field 'Clean URL' on the page where you enter the object details is greyed out, and, below this field, a message is displayed saying 'The Clean URLs functionality is now disabled'. This means that, at present, you cannot control the object's clean URL value. After the form with

the details of the new object is submitted, the clean URL value is generated by X-Cart automatically based on the object's name. After the creation of the new object is completed, you can view the clean URL value generated for the object by X-Cart in the 'Clean URL' field of the object's Details page. Note that this clean URL value is not used anywhere in your store up until the moment the Clean URLs feature is enabled. After the Clean URLs feature is enabled, the clean URL value defined for the object using automatic generation becomes the actual clean URL value of the object's page. If necessary, you can change this clean URL value by editing the contents of the 'Clean URL' field on the object's Details page.

### **Automatic generation of clean URL values as a result of product cloning**

When a product is cloned, the clean URL value for the clone product is generated automatically immediately after the name of the clone product is generated. If necessary, you can change this clean URL value by editing the contents of the 'Clean URL' field on the Details page of the clone product.

### **Automatic generation of clean URL values for manufacturers created by providers in X-Cart PRO when Simple Mode is off**

In stores based on X-Cart PRO, where the module Simple Mode is disabled, providers cannot define or re-define clean URL values for manufacturers. The right to control clean URL values of the manufacturers created by providers belongs to the store administrator.

When a manufacturer is created by a provider, the clean URL value for it is generated automatically. The provider has no control over this value. When the manufacturer is approved by the store administrator, the administrator can re-define its clean URL value.

### **Automatic generation of clean URL values during the import of products and categories**

When products or categories are imported from a CSV file containing the CLEAN\_URL field, the products/categories for which no clean URL values are provided in the CLEAN\_URL field receive automatically generated clean URL values.

### **Automatic generation of clean URL values by X-Cart's clean URL generator**

When your store's database is upgraded from 4.1 to 4.2, or changes are made to the data in your store's database tables directly (not through X-Cart's user interface), objects without clean URL values may appear in your store. For such objects, the store administrator can generate clean URL values using X-Cart's 'Generate clean URL values' tool. This tool is available in the 'Summary/Tools' section of the store's Admin area (See the section [Generate Clean URL Values](#)).

At any moment, the store administrator can find out whether there are any objects with missing clean URL values in the store using the 'Clean URLs info' section of the Summary page (See the section [Using the Summary Page](#)).

### **How automatic generation of clean URL values is performed**

As a result of automatic generation, a clean URL value is created based on the name of the object for which it is intended. All the characters in the name of the object which are not allowed in clean URLs are replaced by hyphens (-). Sometimes, when a unique clean URL value cannot be generated based solely on the object's name, X-Cart ensures uniqueness of the clean URL value by adding other elements (like an ID, SKU or postfix) to the clean URL value formed from the object's name.

## **6.2 Using Page Title and Meta Tags**

### **Page title and meta tags in X-Cart**

The HEAD section of every page in your store contains elements providing metadata about the page. Some of these elements (title, meta description, meta keywords) have significant impact on how the page is ranked by search engines and how it is described in search engine results pages. In X-Cart, you have substantial control over the meta elements and can use them for SEO optimization.

#### **Title element**

The title element contained in the <title> tag defines the page title:

```
<title>Your Company Name</title>
```

When a visitor opens the page in their web browser window, the title element appears in the browser title bar. If the visitor bookmarks the page, the title element is used as the words to describe the page in their bookmarks list.

The title element is very important for search engines. The text contained in the title tag of a page is one of the most important factors that determine how the page is ranked. In addition to that, in all major search engines, the text of the title element is displayed as the title of the page in the search results.

X-Cart provides controls allowing the store administrator to adjust the format and length of text used for the title element.

#### **Meta description and keywords tags**

The meta description tag provides a brief and concise summary of your page's content. This tag looks as follows:

```
<meta name="description" content="X-Cart: full-featured PHP/MySQL shopping cart software & amp;
ecommerce solutions for the best ecommerce websites" />
```

The description is the text that goes between the quotation marks after the "content=" portion of the tag.

The text used in the meta description tag of a page has little to no effect on the page's ranking in the search engines; however, this tag can still come in handy for SEO, because it allows you to influence the description of your store's pages in the web crawlers that support this tag. Different crawlers use this tag differently, but you should expect that if the meta description of your page is deemed relevant by a web crawler, at least a portion of it will be displayed as the description of the page in the search results. If this description is enticing enough, you may get more targeted traffic to your site.

The meta keywords tag is another meta tag that has some significance for SEO. It allows you to provide relevant keywords for your pages. The meta keywords tag takes the following form:

```
<meta name="keywords" content="x-cart, xcart, cart, shopping cart, php, php4, mysql, shop,
e-commerce, store, web store, gift certificates, wish list, top sellers" />
```

Today, very few search engines rely on this tag for information about a page. However, you can still try to use this tag to reinforce the terms you think a page is important for.

In X-Cart, meta description and keywords tags can be defined for each page of the store site.

## Roles in page title and meta tags management

If you are an X-Cart GOLD administrator/provider or an X-Cart PRO administrator:

- You can control the format and length of the page title element (See [Adjusting the Page Title Element](#)).
- You can define the meta description and keywords for the pages of any categories, products, manufacturers and embedded static pages in your store, as well as your store's global meta description and keywords (See [Adjusting Meta Description and Keywords](#)).

If you are an X-Cart PRO provider:

- You can define the meta description and keywords for the pages of the products and manufacturers you own (See [Adjusting Meta Description and Keywords](#)).

## 6.2.1 Adjusting the Page Title Element

You can adjust the format and length of the page title element using the 'Page title format' and 'Maximum length of page title element' options on the 'General settings/SEO options' page.

The 'Page title format' option allows you to specify the desired page title format for all the pages in your store. At present, you can choose one of the following two formats:

- Shop name :: Category name :: Product name
- Product name :: Category name :: Shop name

The elements of which the page title is formed are the same in both cases; what is different is the order in which they appear in the page title. You can use the format that best suits your business needs.

The 'Maximum length of page title element' option allows you to specify the maximum page title length.

For more information on the 'Page title format' and 'Maximum length of page title element' options, see the section [SEO Options](#).

## 6.2.2 Adjusting Meta Description and Keywords

Description and keywords meta tags for the pages of products, categories, manufacturers and embedded static pages can be defined when you create or edit the respective objects. To provide meta description and keywords for the page of a specific object, all you need to do is enter the desired description and keywords into the 'META description' and 'META keywords' fields located on the object's Details page and save the changes.

As a rule of thumb, it is best to provide description and keywords meta tags for each page specifically. However, X-Cart now provides an option that allows you to get meta tags defined for a category applied to all the subcategories and products contained in this category. This option is called 'Use the META data of this category for all the subcategories and products contained in this category'. You can find it on the Details page of each category in your store. For more information about the option 'Use the META data of this category for all the subcategories and products contained in this category', see the section [Defining Category Details](#).

If you are a store administrator, you can also define global description and keywords meta tags for your store site using the 'Site META description' and 'Site META keywords' fields located on the 'General settings/SEO options' page. The global description and keywords meta tags are used only for the pages

that do not have description and keywords meta tags of their own and are not using any other description and keywords meta tags:

- the Customer area main page;
- the pages of manufacturers and embedded static pages that do not have description and keywords meta tags of their own;
- the pages of products and categories that do not have description and keywords meta tags of their own and are not using the description and keywords meta tags of their parent category.

*Examples:*

For example, you have a product X in the category Y. The category Y is located within the category Z.

If...	then...
<p>Description and keywords meta tags are defined for:</p> <ul style="list-style-type: none"> <li>- the product X,</li> <li>- the category Y,</li> <li>- the category Z,</li> <li>- the site in general.</li> </ul>	<p>The product X, the category Y and the category Z each use their own description and keywords meta tags.</p>
<p>Description and keywords meta tags are defined for:</p> <ul style="list-style-type: none"> <li>- the product X,</li> <li>- the category Z,</li> <li>- the site in general,</li> </ul> <p>but not defined for the category Y.</p> <p>The option 'Use the META data of this category for all the subcategories and products contained in this category' is enabled for the category Z.</p>	<p>The product X and the category Z use their own description and keywords meta tags. The category Y uses the description and keywords meta tags of the category Z.</p>
<p>Description meta tags are defined for:</p> <ul style="list-style-type: none"> <li>- the product X,</li> <li>- the category Y,</li> <li>- the category Z,</li> </ul>	<p>The category Y and the category Z use their own description and keywords meta tags.</p> <p>The product X uses the description meta tags of its own and the keywords meta tags defined for the site in general.</p>

If...	then...
<p>- the site in general.</p> <p>Keywords meta tags are defined for all the above, except for the product X.</p> <p>The option 'Use the META data of this category for all the subcategories and products contained in this category' is disabled for the category Y.</p>	
<p>Description and keywords meta tags are defined for the category Z and the site in general, but not defined for the product X and the category Y.</p> <p>The option 'Use the META data of this category for all the subcategories and products contained in this category' is enabled for the categories Y and Z.</p>	<p>The category Z uses its own description and keywords meta tags. The category Y and the product X use the description and keywords meta tags of the category Z.</p>
<p>Description and keywords meta tags are defined for the category Z and the site in general, but not defined for the product X and the category Y.</p> <p>The option 'Use the META data of this category for all the subcategories and products contained in this category' is enabled for the category Z, but disabled for category Y.</p>	<p>The category Z uses its own description and keywords meta tags. The category Y uses the description and keywords meta tags of the category Z. The product X uses the description and keywords meta tags defined for the site in general.</p>



# 7 Optimizing X-Cart Performance

Mid-sized and large-sized stores based on X-Cart often experience problems with X-Cart performance. If this is the case with your store, you should consider optimizing X-Cart to speed things up.

This section provides information on ways to optimize X-Cart performance.

- Study the section [Using the HTML Catalog Feature](#) to learn how you can reduce load on your server by creating and using a static version of the storefront.
- Check out the section [Other Ways to Speed Up Your X-Cart](#) for information on other methods of improving your X-Cart performance.

## 7.1 Using the HTML Catalog Feature

### HTML catalog in X-Cart

X-Cart's pages are dynamic. This means that, whenever a user opens a page in your store, the content that belongs in this page is generated on the fly from data contained in the database.

If your store's product catalog is large, your database server takes longer to handle requests, and your store's visitors may experience slow page load times. With a large number of visitors using your store site at the same time, the problem gets worse, as the number of requests that your server needs to handle also increases. At some point, your web and MySQL servers may become overloaded.

X-Cart provides a solution that allows you to avoid server overload and significantly improve the performance of your store's site: the *HTML Catalog* feature.

HTML catalog is a static version of the storefront, which you can generate and use on the same domain with your store simultaneously with the dynamic version. In stores supporting multiple languages, a separate HTML catalog can be provided for each of the supported languages.

An HTML catalog consists of static HTML pages and includes the following:

*required:*

- `index.html` (the main index page; the content of this page corresponds to the content of the dynamic page `home.php` at the time of catalog generation);

**Note:** If `home.php` contains a list of bestsellers and featured products, the pages of these products are also included during HTML catalog generation.

*optional:*

- category pages;
- manufacturer category pages (if the module Manufacturers is enabled and manufacturers are defined);
- product pages;
- embedded static pages.

After you create an HTML catalog for your store site, your store's visitors use it to view the information contained in your product catalog. They stay in the static part of the store most of the time and are sent to the dynamic part only when they add something to their cart, do a search, or login. Because the pages in an HTML catalog are pure HTML, displaying them in the web browser does not involve accessing the database, so they are served faster, and the load on your web & MySQL servers is reduced. As a result, the overall performance of your store site is improved.

Using the HTML Catalog feature is also good for SEO. Because many search engines give better rankings to static HTML pages than to pages generated dynamically, due to the presence of a static HTML catalog, your site may be ranked higher in search engine listings.

Please note that, however powerful, the HTML Catalog feature has its limitations:

- The minicart displayed on HTML catalog pages does not get updated, ever after a product is added to cart.
- Your HTML catalog has to be re-generated every time you update or rearrange your product catalog.
- If your store's product catalog is large, HTML catalog generation may take an extremely long time, which may render the use of the HTML Catalog feature impractical.

## **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.

## 7.1.1 Generating an HTML Catalog

X-Cart allows you to create a separate HTML catalog for each of the languages supported by your store. Before telling X-Cart to generate an HTML catalog for a specific language, you must create a directory to which X-Cart will be able to write the files of this HTML catalog. This directory must be located within your X-Cart installation directory. To enable X-Cart to write files to this directory, you must ensure that the user under which PHP runs on your server has full access to this directory (write and execute permissions to the directory on Unix systems, or "Full Control" over the directory on Windows systems).

To generate an HTML catalog for a specific language, do the following:

1. Go to the 'HTML catalog' section of your store's Admin area (Administration menu->HTML catalog). A dialog box titled 'HTML catalog' opens:

### HTML catalog

**Note:** If your store has many products and categories, the generation of an HTML catalog may take considerable time. That is why, if you need SEO-friendly URLs, we recommend using [X-Cart's Clean URLs](#) functionality.

**Generate catalogs for the following languages:**

Language	Catalog path	Catalog is stored here
German	<input type="text"/>	
French	<input type="text"/>	
Swedish	<input type="text"/>	
English	<input type="text" value="/catalog"/>	

**Delete all HTML files in target folder:**  Warning! This option will remove all \*.html files (except for the ones which are part of X-Cart) in the catalog directory before generating a new html catalog.

**Generate HTML pages for:**

- Categories
- Products
- Static pages

**Include contents of categories:**

**Include contents of subcategories:**

**Number of pages per one pass:**  Note: Use this if you get timeouts when generating the catalog in one pass.

**Category page filename template:**

**Product page filename template:**

**Manufacturer page filename template:**

**Static page filename template:**

**Replace spaces and slashes in page filenames by this character:**

- Choose the language for which you would like X-Cart to generate an HTML catalog and specify the directory to which you wish this HTML catalog to be generated:

At the top of the 'HTML catalog' dialog box, you can see a subsection titled 'Generate catalogs for the following languages'. This subsection provides a table listing all the languages currently

supported by your store. Locate the language for which you wish the HTML catalog to be generated and use the 'Catalog path' field opposite the name of this language to specify the directory in which the HTML catalog must be created. The directory path must 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 wish the HTML catalog to be accessible at the URL `http://www.example.com/xcart/catalog/` (which corresponds to the directory `/home/user/public_html/xcart/catalog`), specify the directory path as `"/catalog"`.

You can choose to generate HTML catalogs for multiple languages in one run. In this case, complete the 'Catalog path' field for each of the languages that need an HTML catalog.

It is recommended that you use separate directories for the HTML catalogs generated for different languages. Creating HTML catalogs for multiple languages in the same directory will result in that the files of these catalogs will get mixed up. When, in the future, you need to update one of the HTML catalogs stored in this directory, you will not be able to use the option 'Delete all HTML files in target folder' (see below) without deleting the files of all the other HTML catalogs in this directory.

For similar reasons, it is recommended that you do not create HTML catalogs directly in your X-Cart installation directory if you use this directory to store any HTML files.

3. Use the check box 'Delete all HTML files in target folder' to specify whether you wish to delete all HTML files from the directory to which the HTML catalog will be generated before the generation process begins. Generating the HTML catalog with this check box selected will cause the removal from the directory of all the files with the `.html` or `.htm` extension, except for the file `shop_closed.html`, should this file be located in the said directory.
4. Specify the pages that you wish to include into your HTML catalog. Please note that the `index.html` page of your HTML catalog will provide links to all of your store's root categories and embedded static pages, and the pages of categories will provide links to the pages of subcategories and products contained in them. For this reason, if you choose not to include specific pages into your HTML catalog, your HTML catalog will have broken links.

To specify the pages that you wish to include into your HTML catalog, do the following:

- a) In the subsection 'Generate HTML pages for', specify the types of objects whose pages need to be included into the HTML catalog. You can select some or all of the following: *Categories*, *Products*, *Manufacturers* and *Static pages*. For the creation of a complete HTML catalog, select all the types.
- b) From the 'Include contents of categories' drop-down box, select the category/categories to be included. For the creation of a complete HTML catalog, select the option *Root categories*.

- c) Use the check box 'Include contents of subcategories' to specify whether the subcategories of the selected category/categories must be included. For the creation of a complete HTML catalog, select this option.
5. For now, leave the option 'Number of pages per one pass' set to *All* (This option needs to be readjusted only if you get timeouts in the process of generation; see [below](#) for an explanation).
  6. Adjust the page filename format for the HTML catalog. For instructions, see the section [Adjusting the Format of Page Filenames for the HTML Catalog](#)).
  7. Click the **Generate catalog** button.

When you click on **Generate catalog**, X-Cart begins generating the HTML catalog to the specified directory. While X-Cart is generating the catalog, you will be able to see the progress on the screen. Please be patient and allow sufficient time for the procedure to be completed.

At the end, a message should appear indicating the successful completion of the process: 'HTML catalog was created successfully. Time elapsed: XX.XX second(s)'. Shortly after the success message is displayed, you should be redirected back to the 'HTML catalog' page. If you are not redirected automatically in 30 seconds, use the link '[continue >>](#)' at the bottom of the page.

For your convenience, after the generation process is completed, X-Cart displays the location of the generated HTML catalog opposite the name of the language for which it was generated (See the table column 'Catalog is stored here').

Normally, X-Cart generates all the pages of an HTML catalog in one run. However, if your store's product catalog is very large, you might not be able to complete the process of generating your HTML catalog in one run without getting timeouts. If you get timeouts, try readjusting the option 'Number of pages per one pass'. By default, this option is set to *All*. You can select a different value to tell X-Cart to generate the HTML catalog in portions. The values available for selection from the 'Number of pages per one pass' drop-down box correspond to the number of HTML catalog pages that X-Cart will generate per one pass. You will probably have to experiment with this option to find the number of pages that will be appropriate for your database size and server performance.

After the process of generating the HTML catalog is completed, be sure to change the permissions on the directory to which the catalog was generated back to normal.

Once generated, the catalog can be left in the directory to which it was generated or moved to any other directory on the same domain.

## 7.1.2 Updating an Existing HTML Catalog

An HTML catalog is made of static pages. Unlike the contents of your store's dynamic pages, the contents of these pages does not change automatically just because you updated the information in the product catalog of your dynamic store (added or deleted a product, renamed a category, etc). To keep the information in your existing static HTML catalogs in sync with the information in your dynamic store, you must update your existing HTML catalogs every time you update or rearrange your product catalog. The updating of an HTML catalog can be accomplished either by re-generating the entire HTML catalog anew or by re-generating just the portion affected by the changes.

To update an HTML catalog, do the following:

1. Go to the 'HTML catalog' section (Administration menu->HTML catalog). A dialog box titled 'HTML catalog' opens.
2. In the subsection 'Generate catalogs for the following languages', locate the name of the language for which you would like to update the HTML catalog. Make sure the 'Catalog path' field for this language contains the correct path to the directory where the HTML catalog that needs to be updated is stored.

You can choose to update the HTML catalogs for multiple languages in one run. In this case, check the catalog paths for all the languages for which the catalog will be updated.

Clear the 'Catalog path' field for all the languages for which you do not wish to update the catalog this time.

3. Adjust the check box 'Delete all HTML files in target folder'. If the purpose of updating is just to add new pages to the catalog, leave this check box unselected; this ensures that X-Cart will not waste time deleting and re-generating the pages that did not change. If, however, the purpose of updating is not just to add new pages, but to replace/remove some existing pages, select this check box; this ensures that X-Cart will remove all HTML files from the HTML catalog directory before re-generating the catalog.
4. Specify the portion of the HTML catalog that you wish to be updated:
  - a) In the subsection 'Generate HTML pages for', specify the types of objects whose pages need to be generated. You can choose from *Categories*, *Products*, *Manufacturers* and *Static pages*. Select the check box for each type of objects for which pages need to be generated.
  - b) Use the 'Include contents of categories' drop-down box to select the category/categories in your HTML catalog that you wish to be updated. To tell X-Cart to re-generate the entire HTML catalog, select *Root categories*. To tell X-Cart to re-generate 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 wish to exclude this product from your HTML catalog, select the category *Books* from the 'Category' drop-down box).

- c) Use the check box 'Include contents of subcategories' to tell X-Cart whether you wish the subcategories of the selected category/categories to be updated.
5. Leave the option 'Number of pages per one pass' set to the same value that you normally use when generating a new HTML catalog.
6. Ensure that the page filename format settings (the page filename templates and the character for replacing spaces and slashes in page filenames) are adjusted the same way as when the HTML catalog was originally generated.
7. Click the **Generate catalog** button.

When you click on **Generate catalog**, X-Cart begins the generation process. When the process is completed, the HTML catalog for the selected language is updated.

### 7.1.3 Adjusting the Format of Page Filenames for the HTML Catalog

Before telling X-Cart to generate an HTML catalog, you can adjust the format according to which X-Cart will generate the page filenames for this catalog.

Adjusting the format of page filenames includes two tasks:

1. Adjusting a [page filename template](#) for each type of pages in your HTML catalog.
2. Adjusting the [character for replacing spaces and slashes](#) in page filenames.

Both the tasks can be performed in the 'HTML catalog' section of your store's Admin area.

#### Adjusting page filename templates

Typically, an HTML catalog includes pages of products, categories, manufacturers and embedded static pages. For each of the said types of pages, X-Cart provides an editable template defining the format of the page filename. This template specifies the components that must be included into the page filename and the order in which they must be included.

The default template values are the following:

- Category page filename template: {catname}-{order}-p-{page}-c-{catid}.html

- Product page filename template: {prodname}-p-{productid}.html
- Manufacturer page filename template: {manufname}-{order}-p-{page}-mf-{manufid}.html
- Static page filename template: {pagename}-sp-{pageid}.html

In the templates, everything that goes outside the curly brackets is the invariable part of the page filename. The portions surrounded by curly brackets are special tags that hold a place for variable parameters. When X-Cart generates an HTML catalog, these special tags are replaced by the actual parameter values as follows:

- {catname} - Category name.
- {prodname} - Product name.
- {manufname} - Manufacturer name.
- {pagename} - Embedded static page name.
- {catid} - Category ID.
- {productid} - Product ID.
- {manufid} - Manufacturer ID.
- {pageid} - Embedded static page ID.
- {order} - Product sort order; includes an indication of the method by which the sorting is done (orderby, sku, title, price) and the sorting direction (0 - ascending, 1 - descending).
- {page} - Page number.

To understand how page filename templates work, consider the following example:

If you have a product named "Lightbulb" whose product ID is defined as 42, and the product page filename template for your HTML catalog is defined as {prodname}-p-{productid}.html, the filename of the respective product page in the HTML catalog will be Lightbulb-p-42.html.

To readjust the page filename template value for a specific type of pages, do the following:

1. In the 'HTML catalog' section, click on the [+] icon next to the template value you wish to edit. This opens the template value in edit mode:



Product page filename template:

[Need help?](#)

Now the template value is displayed inside an editable field.

## 2. Edit the template value.

To find out the format requirements, use the link 'Need help?' displayed in edit mode next to the template value. When the mouse hovers over this link, a tooltip is displayed with a list of characters and special tags which can be used in the template. The set of allowed characters is the same for all the templates: alphanumeric characters (A-Z, a-z, 0-9), dot (.), hyphen (-) and underscore (\_). The set of allowed special tags depends on the type of pages for which the template is intended. Note that, for each page type, there is a set of required parameters, which must be included into the page name. You will be required to include the special tags that stand for these parameters. The maximum length of a page filename template value is 200 characters (This includes the characters in the names of special tags).

Below the editable field containing the template value, you can see a set of links named after special tags. These links represent the special tags which can be used in the template. The links are provided for your convenience so you do not have to type out the names of special tags: clicking on a special tag link inserts the special tag into the template at the current cursor position; clicking the same link again removes the special tag from the template.

As you edit the template value, X-Cart dynamically checks its format for correctness. As long as the format requirements are met, the frame of the field containing the template value being edited is displayed as green. If the frame of the template field becomes red, and an error message is displayed, it means that the format of the template value is invalid and must be changed.

3. At any moment, you can use the [Reset](#) link to undo any changes you made to the template value during the current editing session. Clicking on this link resets the template value to its pre-editing state.
4. After you are done editing, click the **Apply** button to save the changes.

When you click on **Apply**, the template is updated.

**Note:** At this point, the changes made to the template are not yet saved. The saving is done when you click the Generate catalog button at the bottom of the 'HTML catalog' dialog box to start catalog generation.

5. To exit template edit mode, click the [ - ] icon next to the template you are editing.

## Adjusting the character for replacing spaces and slashes in page filenames

Filenames of the pages of products, categories, manufacturers and embedded static pages in HTML catalog include names of products, categories, manufacturers and embedded static pages, respectively, as variable parameters. The names of the said objects (products, categories, manufacturers and embedded static pages) may contain spaces and slashes. Using spaces and slashes in filenames and URLs is not considered good practice, so X-Cart provides a mechanism that replaces space and slash characters in filenames by another character at the time of HTML catalog generation.

You can specify which character must be used to replace spaces and slashes in the HTML catalog page filenames. This can be done by adjusting the option 'Replace spaces and slashes in page filenames by this character' in the 'HTML catalog' section of your store's Admin area. This option appears as a drop-down box with two values: *Hyphen (-)* and *Underscore (\_)*. Before you tell X-Cart to generate an HTML catalog, you must select one of these values, and it will be used to replace any space and slash characters in the page filenames of this HTML catalog.

Consider the following example:

If you have a product named "Lord of the Rings /DVD/" whose product ID is defined as 24, the product page filename template for your HTML catalog is defined as {prodname}-p-{productid}.html, and the character for replacing spaces and slashes is defined as hyphen (-), the filename of the respective product page in the HTML catalog will be Lord-of-the-Rings-DVD-p-24.html.

## 7.2 Other Ways to Speed Up Your X-Cart

Besides the HTML Catalog feature, X-Cart provides a few more ways to improve your store site's performance. It is recommended you do the following:

- **Move your images to the file system**

Storing your images in the database is not a good idea from the viewpoint of performance. To speed up your store, ensure that your images are in the file system, not in the database. You can easily change the location of your images using the 'Images location' section of your store's Admin area. For details, study the section [Images Location Management](#).

- **Disable Advanced Statistics**

It is strongly recommended you disable all the modules and functions that you do not need. If you experience problems with X-Cart performance, one of the first things you should do is disable the module Advanced Statistics. This module significantly slows down X-Cart by storing statistical information in the database. Advanced Statistics and any other modules that you do not need can be disabled via the 'Modules' section of X-Cart's Admin area. For details, study the section [Modules and](#)

[Add-ons.](#)

- **Optimize database tables**

X-Cart stores its data in database tables, and over time these tables may become fragmented/less organized. This is especially true if you make changes to the data in your store's database tables directly.

X-Cart provides a tool that allows you to defragment the database and reclaim the unused space: 'Optimize tables'. For details on using this tool, see the section [X-Cart's Advanced Tools](#).

## 8 Customizing the Look and Feel

This section provides some basic information about ways to customize X-Cart's look and feel.

- Refer to the chapter [Reinstalling skins](#) to find out how you can change the current skin.
- See the chapter [Editing X-Cart's Skin Files](#) to learn about ways to change X-Cart's look and feel by editing its skin files.
- 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.
- Read the section [Adjusting the 404 Error Page](#) to find out how you can adjust the page displaying the 'Page not found' error in X-Cart.

### 8.1 Reinstalling skins

#### Before re-installing skins

Make sure you know the Auth code for the installed copy of X-Cart 4.2.3.

To find out the Auth code, use one of the following methods:

- Retrieve the value of the variable '\$installation\_auth\_code' from the file 'include/install.php' inside the X-Cart root directory;
- In the Admin area, open the 'Summary' section (Administration menu->Summary) and see the Auth code BEFORE the 'License info' subsection.

Skins for X-Cart 4.2.3 can be reinstalled either manually or via the X-Cart installation Wizard. The exact instructions on how to reinstall the skins depend on which of the methods you use.

#### To reinstall skins via the X-Cart Installation wizard:

1. In the X-Cart root directory, locate the file 'install-file-xx-xx-xx-xxxxx.php' where the symbol 'x' stands for the numbers and letters (e.g. 'install-file-09-01-22-077ce.php') and rename it to 'install.php'.
2. Run the Installation Wizard by opening in a web browser the URL `http://<YOUR_XCART_DOMAIN>/install.php` where the variable `<YOUR_XCART_DOMAIN>` stands for the true name of the domain where X-Cart is installed.
3. Choose the 'Re-install skin files' option, enter the Auth code and select the 'I accept the License Agreement' check box. Click the **'Next'** button to continue the installation.
4. In the 'Select shop layout' drop-down box, choose one of the available skins and click the **'Next'** button.

The installation script starts copying the template structure of the chosen skin from the directory `<xcart_root>/schemes/templates/<skin_name>` to the main X-Cart's skin directory `<xcart_root>/skin1` and creates a new layout. The progress is displayed on the screen.

5. Wait till the installation script copies the templates and creates the layout. After the process is completed, the installation script displays a preview of the Customer area with the chosen skin.

If you are satisfied with the preview and wish to accept the skin, click the **'Next'** button to continue the installation.

If you want to choose a different skin, click the **'Back'** button. This moves you to the previous step of the Installation Wizard where you will be able to choose a different skin.

6. Wait till the system generates a new system fingerprint and click the 'Next' button to complete the installation.

### To reinstall skins manually:

1. Copy the contents of the directory '`<xcart_root>/schemes/templates/<skin_name>`' to to the main X-Cart's skin directory '`<xcart_root>/skin1`'. If prompted, choose to overwrite the existing files.

**Note:** The '`<skin_name>`' part stands for the name of the folder with the skin that you want to use. It can have one of the following values:

- `artistictunes_business`;
- `artistictunes_car_tires`;
- `fashion_mosaic_green`;
- `fashion_mosaic_pink`;
- `vivid_dreams_aquamarine`;
- `neon_lights_sport`;

etc.

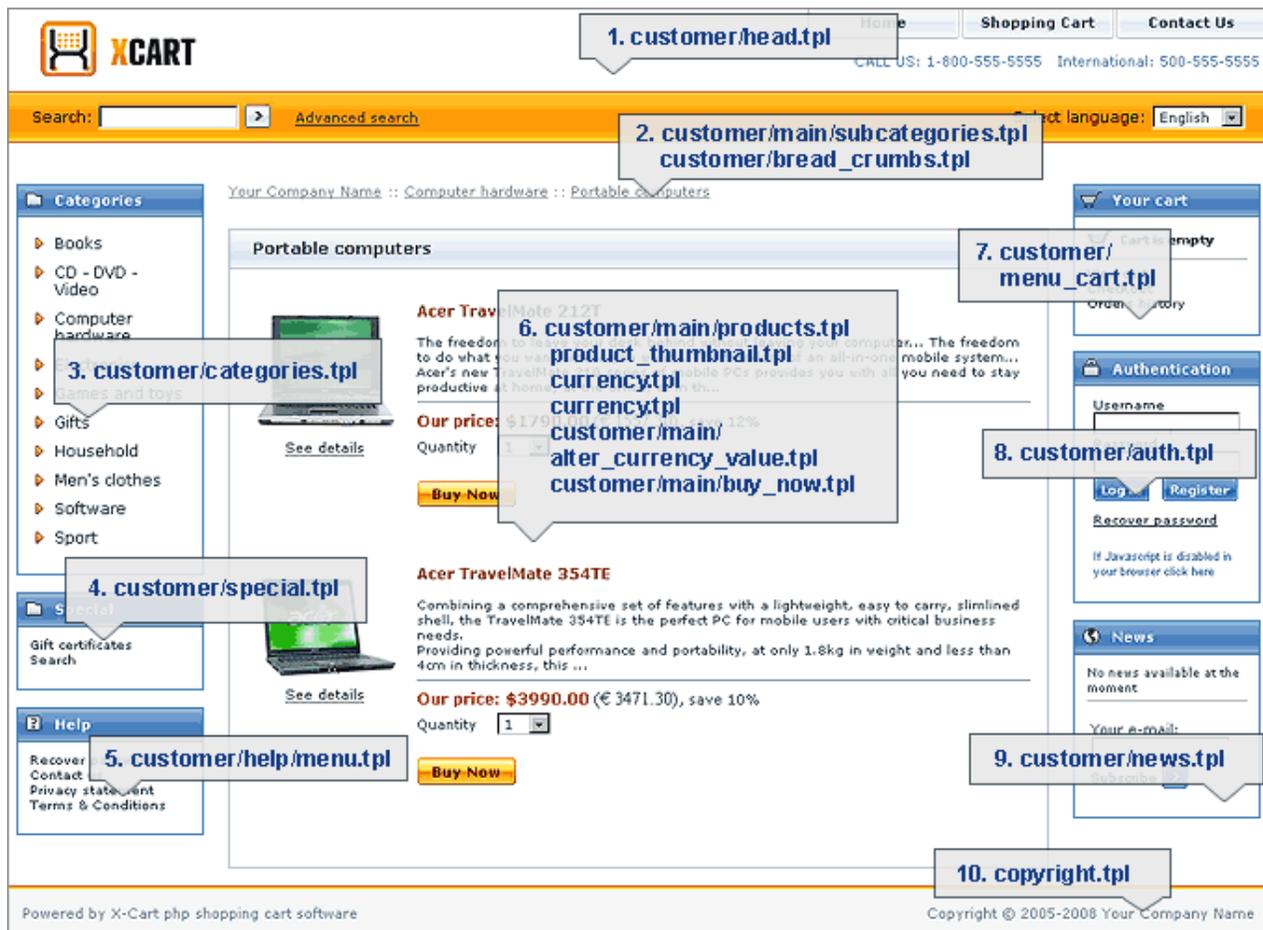
2. After you copy the skin files to the directory 'skin1/', set the permissions of every subdirectory and file inside the directory 'skin1/' to 777 (write, read and execute for everybody).
3. To see the changes, clear the contents of the directory `<xcart_root>/var/templates_c` which contains previously compiled templates.

## 8.2 Editing X-Cart's Skin Files

An X-Cart skin typically includes PHP Smarty templates, CSS files, JavaScript files and, in some cases, HTML files.

The PHP Smarty templates of your store's skin are files out of which your store's pages are built. Each template file defines how a specific element of the site appears. Template files are made up of HTML/CSS and Smarty; all of them have the .tpl file extension.

The screenshot of the customer front end below provides an example of how a page is created using templates:



The CSS files of your store's skin are style sheets that define the presentation of your store's pages. They use the extension `.css`.

The JavaScript files of your store's skin are files that contain JavaScript code which can be called on your store's pages. They use the extension `.js`.

If you wish to change the look of a specific element of your store site, you need to edit the skin files that control this element. Most typically, you will need to edit X-Cart's template and CSS files. To be able to edit X-Cart's template and CSS files, you must possess substantial knowledge of HTML, CSS and Smarty. Here is a list of online resources that might be helpful:

#### 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:

Smarty resources: <http://www.smarty.net/>

Smarty online documentation: <http://www.smarty.net/docs.php>

All the files of your X-Cart skin are stored in the directory `/xcart/skin1`, where `/xcart` stands for the X-Cart installation directory. Your store's Admin area provides a section that allows you to view and manage the contents of this directory (see the section [Managing X-Cart's Skin Files](#)).

The number of skin files in X-Cart is really large, so finding out which file controls what elements may require a great deal of effort. We recommend you begin by studying the chapters [Overview of X-Cart's Templates](#) and [Overview of X-Cart's CSS Files](#). When you begin working on the skin files more closely, we also recommend you use the Debugging Console, a tool that will help you to find out the skin files for each page of the your X-Cart based store (See the section [Using X-Cart's Debugging Console](#)).

X-Cart's skin files can be edited in X-Cart's built-in template editor (see the section [Using X-Cart's Template Editor](#)), or in any decent external text editor.

## 8.2.1 Managing X-Cart's Skin Files

You can manage the contents of X-Cart's `/xcart/skin1` directory using the 'Browse templates' section of your store's Admin area (Administration menu->Edit templates). The functionality of this section is similar to that of the 'Browse files' section (Administration menu->Files): it provides a file browser that you can use to view the contents of the directory `/xcart/skin1`, to upload your own files, to copy and delete existing files, to create and delete sub-directories. In addition to the said operations, the file browser in this section allows you to compile templates (See the section [Compiling templates](#)) and to restore any skin files that have been edited to their original state (See [Restoring all files](#)).

### Browse templates

<input type="radio"/> ../	<input type="radio"/> dialog_message.tpl
<input type="radio"/> admin/	<input type="radio"/> dialog_printable.tpl
<input type="radio"/> buttons/	<input type="radio"/> dialog_tools.tpl
<input type="radio"/> customer/	<input type="radio"/> dialog_tools_cell.tpl
<input type="radio"/> CVS/	<input type="radio"/> editor.js
<input type="radio"/> fulfilment/	<input type="radio"/> editor_common.js
<input type="radio"/> help/	<input type="radio"/> editorns.js
<input type="radio"/> images/	<input type="radio"/> form_validation_js.tpl
<input type="radio"/> jquery/	<input type="radio"/> generate_required_fields_js.tpl
<input type="radio"/> mail/	<input type="radio"/> head.tpl
<input type="radio"/> main/	<input type="radio"/> head_admin.tpl

---

**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.

The Quick access menu above the 'Browse templates' dialog box allows you to quickly access specific files/groups of files in `/xcart/skin1`:



## Compiling templates

X-Cart allows you to "compile" templates, i.e. to replace the language variables used in your store's templates with the values of these variables. When your store's templates are compiled, the text stored in the language variables used in this template is inserted directly into the template code. This feature is useful for stores using only one language: compiling templates significantly reduces the time needed for template processing, because X-Cart does not need to use language variables.

If you choose to compile your store's templates, you will be able to edit any textual elements of your store's user interface in X-Cart's built-in template editor, but you will not be able to edit them using the 'Edit languages' section (Administration menu->Languages) or Webmaster mode.

To compile your store's templates, do the following:

1. Go to the 'Browse templates' section of your store's Admin area (Administration menu->Edit templates). You should see a dialog box titled 'Browse templates'. 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.
2. From the 'Language' drop-down box, select the language you wish to use in the compiled templates.
3. Click the **Compile templates** button. When prompted, confirm the deletion.

When you do that, X-Cart begins the compiling process. While X-Cart is compiling, you will be able to see the progress on the screen. Please be patient and allow sufficient time for the procedure to be completed.

At the end, a message should appear indicating the successful completion of the process: 'All templates are successfully compiled'. Shortly after the success message is displayed, you should be redirected back to

the 'Browse templates' page.

## Restoring all files

At any time you can restore your store's skin files to their original state (as in a fresh X-Cart installation). This is possible because X-Cart's directory `/xcart/skin1_original` stores a backup of the original skin files. When you perform the restoration procedure, any modified files of your store's skin are overwritten by the original files from this directory.

To enable X-Cart to restore the files of your store's skin from `/xcart/skin1_original`, you must ensure that the user under which PHP runs on your server has read and write permissions for the directory `/xcart/skin1`, as well as read and write permissions for all the files of the current skin stored in this directory.

To restore all the files of your X-Cart store, do the following:

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. In the 'Browse templates' dialog box, click the **Restore All** button.

When you click on **Restore All**, the skin files of your X-Cart stored in `/xcart/skin1` are replaced by the original files from the directory `/xcart/skin1_original`.

## 8.2.2 Overview of X-Cart's Templates

### Templates stored in the directory `/xcart/skin1`

The templates stored in the directory `/xcart/skin1`, except for `product_thumbnail.tpl` and `currency.tpl`, are used only for the store's back end. Some of the major templates in this directory are the following:

- `rectangle_top.tpl` - The template that controls the overall width and height of the store's layout (affects only the store's back end).
- `dialog.tpl` - The template that provides the main 'wrapper' of all content in the main window of X-Cart (affects only the store's back end).
- `menu.tpl` - The template that provides the 'wrapper' for the side menu boxes.
- `head_admin.tpl` - The template that controls the 'header' row for the Admin and Provider areas. It contains the logo and the language selector.
- `head.tpl` - The template that controls the 'header' row for the Partner area. It contains the logo and the

language selector.

- `bottom.tpl` - The template that controls the 'footer' of the site. It contains the 'Powered by' ( `poweredby.tpl`) and 'Copyright' text (`copyright.tpl`).
- `rectangle_bottom.tpl` - The counterpart to `rectangle_top.tpl` (affects only the store's back end).
- `dialog_message.tpl` - The template that controls the top message box that pops up at the top of the main window in the store's back end.
- `auth.tpl` - The template that controls the side menu login box (affects only the store's back end).
- `authbox.tpl` - The template that controls the side menu login box for logged in users (affects only the store's back end).
- `help.tpl` - The template that controls the side menu help box containing links to the help pages. This template also contains the code that automatically adds a link when you add a new embedded static page.
- `location.tpl` - The template that contains the code for the breadcrumb navigation (at the top of the main content area).
- `news.tpl` - The template that controls the side menu newsletter sign-up box.
- `today_news.tpl` - The template that controls the side menu that shows the current news.

The templates `product_thumbnail.tpl` and `currency.tpl` are used both for the back end and the Customer area:

- `product_thumbnail.tpl` - The template that controls the thumbnail of a product.
- `currency.tpl` - The template that controls the format of the currency.

## Templates stored in the sub-directories of `/xcart/skin1`

The template files contained in the sub-directories of `/xcart/skin1` are the following:

- `skin1/admin` and `skin1/provider` - Templates for the store's back end.
- `skin1/single` - Templates for the store's Admin area, X-Cart GOLD.
- `skin1/customer` - Templates for the store's Customer area.
- `skin1/partner` - Templates for the store's Partner area (X-Affiliate add-on module).
- `skin1/fulfilment` - Templates for the pages intended for fulfillment staff users.

- skin1/main - Miscellaneous templates for the main content area.
- skin1/mail - Mail templates.
- skin1/buttons - Button templates for all areas.
- skin1/help - Templates for help pages (like FAQ, Contact us, Terms and conditions, etc).
- skin1/pages - Templates for embedded static pages.
- skin1/payments - Templates for payment processors' pages.
- skin1/images - Images.
- skin1/modules - Templates for X-Cart's modules and add-ons.

Some of the template files contained in the sub-directory `/xcart/skin1/customer` are the following:

- customer/home.tpl - The main template for the Customer area of the store.
- customer/head.tpl - The template that controls the 'header' row for the Customer area. By default, it contains the logo, the Speed bar tabs, the search box (customer/search.tpl) and the language selector.
- customer/auth.tpl - The template that controls the side menu login box for the Customer area.
- customer/authbox.tpl - The template that controls the side menu login box for logged in customers.
- customer/categories.tpl - The side menu category template.
- customer/dialog.tpl - The template that provides the main 'wrapper' of all content in the main window of X-Cart in the Customer area.
- customer/home\_main.tpl - The template that controls what is displayed in the main content area.
- customer/menu\_cart.tpl - The template that controls the side menu cart.
- customer/search.tpl - The search box template.
- customer/special.tpl - The side menu Special template.

Some of the template files contained in the sub-directory `/xcart/skin1/customer/main` are the following:

- customer/main/cart.tpl - The template that controls the main shopping cart structure page.
- customer/main/checkout.tpl - The template that controls the checkout process structure.
- customer/main/subcategories.tpl - The template that controls the sub-category display, and also is

the 'wrapper' for the products display.

- `customer/main/products.tpl` - The template that includes either `products_list.tpl` or `products_t.tpl` depending on how the setting 'Display products list in multiple columns (1-3) (leave empty to use standard format)' is adjusted in the section General Settings/Appearance options.
- `customer/main/products_list.tpl` - The template that controls the products display under a category for a single column layout.
- `customer/main/products_t.tpl` - The template that controls the products display under a category for a multi-column layout.
- `customer/main/product.tpl` - The template that controls the product details page.
- `customer/main/order_message.tpl` - The template that controls the confirmation screen for checkout.

Some of the template files contained in the sub-directory `/xcart/skin1/mail` are the following:

- `mail/html/order_invoice.tpl` - The template that controls the invoice on the order confirmation screen and order e-mails.
- `mail/html/order_data.tpl` - The template that controls the product data on the invoice.

The template files contained in the sub-directory `/xcart/skin1/modules/Fast_Lane_Checkout` are used to control the look of cart and checkout pages if the Fast Lane Checkout module is enabled. Some of the templates are the following:

- `Fast_Lane_Checkout/home.tpl` - The template that controls the structure of cart and checkout pages.
- `Fast_Lane_Checkout/home_main.tpl` - The template that controls what is displayed in the main content area - the cart itself and checkout steps (authorization/registration, shipping method selection, payment method selection, preview).
- `Fast_Lane_Checkout/head.tpl` - The template that controls the 'header' row for cart and checkout pages.

## 8.2.3 Overview of X-Cart's CSS Files

X-Cart's CSS files for the Customer area are the following:

- skin1/main.css - Main CSS file for the Customer area.
- skin1/main.FF.css - Browser-specific CSS for Mozilla FireFox, Customer area.
- skin1/main.IE6.css - Browser-specific CSS for Microsoft Internet Explorer 6, Customer area.
- skin1/main.IE7.css - Browser-specific CSS for Microsoft Internet Explorer 7, Customer area.
- skin1/main.popup.css - CSS for layer-based popups, Customer area.
- skin1/main.popup.IE6.css - Browser-specific CSS for layer-based popups in Microsoft Internet Explorer 6, Customer area.

X-Cart's CSS files for the store's back end (Admin and Provider areas) are the following:

- skin1/skin1\_admin.css - Main CSS file for the Admin area.
- skin1/skin1\_printable.css - CSS file for the printable version of the Admin area.

CSS files for X-Cart's built-in modules are the following:

### *Fast Lane Checkout*

- skin1/modules/Fast\_Lane\_Checkout/main.css - Main CSS file for the Customer area, Fast Lane Checkout module.

### *Gift Certificates*

- skin1/modules/Gift\_Certificates/template\_sample\_1.css - CSS file for template\_sample\_1.tpl, Gift certificates module.
- skin1/modules/Gift\_Certificates/template\_sample\_2.css - CSS file for template\_sample\_2.tpl, Gift certificates module.

### *HTML Editor*

- skin1/modules/HTML\_Editor/scripts/style/editor.css - CSS file for the WYSIWYG editor, Admin area, HTML Editor module (*editing not recommended*).

### *Subscriptions*

- skin1/modules/Subscriptions/calendar.css - CSS file for the calendar in the Admin area, Subscriptions module.

CSS files for X-Cart's add-ons are the following:

*X-Affiliate*

- skin1/modules/XAffiliate/main.css - Main CSS file for the Customer area, X-Affiliate add-on.

*X-Configurator*

- skin1/modules/Product\_Configurator/main.css - Main CSS file for the Customer area, X-Configurator add-on.

*X-Fancy categories*

- skin1/modules/Fancy\_Categories/main.css - Main CSS file for the Customer area, X-FancyCategories add-on.

*X-FeatureComparison*

- skin1/modules/Feature\_Comparison/main.css - Main CSS file for the Customer area, X-FeatureComparison add-on.
- skin1/modules/Feature\_Comparison/main.IE6.css - Browser-specific CSS for Microsoft Internet Explorer 6, Customer area, X-FeatureComparison add-on.

*X-GiftRegistry*

- skin1/modules/Gift\_Registry/main.css - Main CSS file for the Customer area, X-GiftRegistry add-on.

*X-Magnifier*

- skin1/modules/Magnifier/main.css - Main CSS file for the Customer area, X-Magnifier add-on.

*X-RMA*

- skin1/modules/RMA/main.css - Main CSS file for the Customer area, X-RMA add-on.

*X-SpecialOffers*

- skin1/modules/Special\_Offers/main.css - Main CSS file for the Customer area, X-SpecialOffers add-on.

*X-Survey*

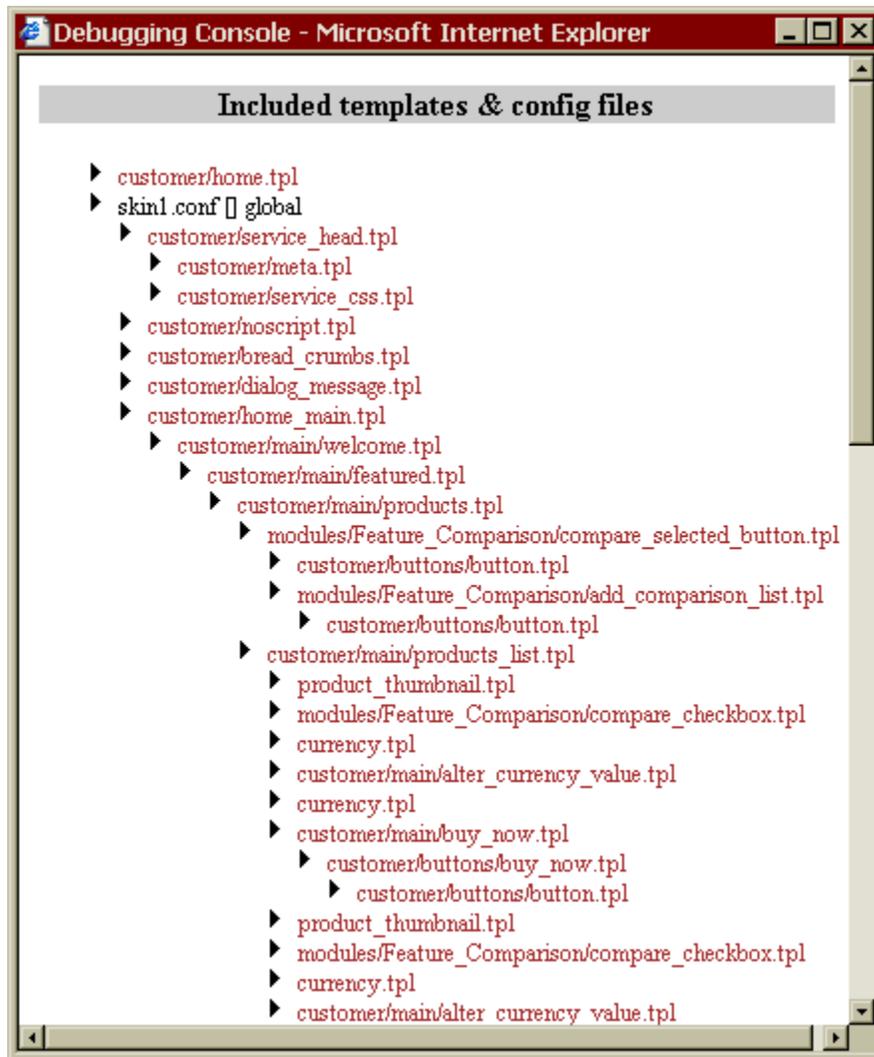
- skin1/modules/Survey/main.css - Main CSS file for the Customer area, X-Survey add-on.

## 8.2.4 Using X-Cart's Debugging Console

When working on X-Cart's templates, you may want to use X-Cart's Debugging console. It is a 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.

When enabled, the Debugging console is displayed in a separate browser window. This window contains a list of templates and config files used for the current page. Note that this list is organized hierarchically, so you can see which template includes what. For example, if you use the Debugging console to explore the template structure of the Customer area front page, the result may be something like this:



As you move about the store, the contents of the Debugging console window gets updated for each page.

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: clicking on the name of a template opens the respective file in X-Cart's template editor (See [Using X-Cart's Template Editor](#)).

## 8.2.5 Using X-Cart's Template Editor

X-Cart provides a built-in template editor. This editor allows you to view and edit your store's skin files.

To open a skin file in X-Cart's template editor, use one of the following methods:

- With X-Cart's Debugging console enabled, locate the file you wish to edit and click on its name in the Debugging console window.

*or*

- Go to the section 'Browse templates' (Administration menu->Edit templates), use the file browser to locate the file you wish to edit and click on its name.

As a result, the contents of the selected file opens in X-Cart's template editor as follows:



**Edit file**

skin1/main

File: /main/orders.tpl

```
{*
$Id: orders.tpl,v 1.78 2008/11/17 12:47:41 max Exp $
vim: set ts=2 sw=2 sts=2 et:
*}
{include file="page_title.tpl"
title=$lng.lbl_orders_management}
{include file="dialog_tools.tpl"}
<br />
{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"
src="{ $SkinDir}/reset.js"></script>
<script type="text/javascript">
<!--
var txt_delete_orders_warning
= "{$lng.txt_delete_orders_warning|wm_remove|escape:j
avascript|strip_tags}";
```

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

Now you can edit this file as necessary.

To save the changes after the editing has been completed, click the **Save** button. To quit editing without saving your changes, click on **Cancel**. To restore the original file, click on **Restore**.

If the file opened in the template editor is a template, you can preview the element whose appearance is defined by this template the way it will appear in your store. To do so, use the **Preview** button. If you click on **Preview** with the check box 'Use default stylesheet for template preview' selected, the

presentation of the element corresponding to the template will be defined by the main CSS file for the respective X-Cart area.

Typically, any changes you make to X-Cart's templates become visible in your store immediately after you click on **Save**. However, in some cases, some of the changes may not appear in the store because an older version of the template was cached. If you know you edited a specific template, but the changes do not appear in your store after the file has been saved, you must clear your store's templates cache (the contents of the directory `/templates_c`). You can either remove the entire contents of the directory `/templates_c` manually, or use X-Cart's 'Clear templates cache' tool (See [X-Cart's Advanced Tools](#)).

## 8.3 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 area.

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](#)).

### 8.3.1 Managing X-Cart's Language Variables

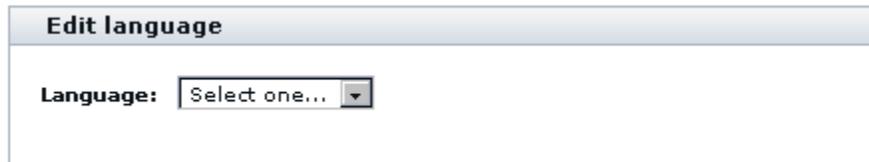
X-Cart's 'Languages' section allows you to edit the values of existing language variables, add new language variables and delete the language variables that you do not need in your store.

#### 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's 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.



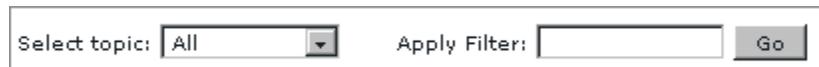
The page will be refreshed to display all the tools needed for editing the variables of the selected language.

## 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 Admin area 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's back end;
- Options - titles of subsections of the 'General settings' section of the store's back end, names of

specific options and settings, help notes for specific options and settings;

- 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.

## 8.3.2 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.

The following browsers support Webmaster mode:

IE 6.0.3790

IE 7.0.6000.16386

Firefox 2.0.0.5

**Note:** If you are using Firefox and the browser status line (at the bottom) does not change when you move the mouse over the site, with the Webmaster mode enabled, please make sure the option "Change status bar text" (Browser settings -> Content -> Advanced (Advanced JavaScript Settings) is enabled in your browser.

Opera 9.22

Mozilla 1.7.13

Safari 2.0.4

Safari 3.0.4

Netscape Navigator 9.0.05 (limited support: hyperlinks cannot be edited after pressing the "e" button)

Konqueror 3.5.7

Ephiphany 2.18.3

Other browsers may support Webmaster mode, but we cannot guarantee it as thorough testing has not been carried out.

**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 Admin area (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**.

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:

**Management**

- Users
- Categories
- Manufacturers
- Wish lists
- Orders
- News management
- Statistics
- Shipping methods
- Tax system
- Edit ratings
- Countries
- States
- Gift certificates
- UPS OnLine® Tools

**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

Main page :: Webmaster mode

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.

Close 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).

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 area, simply browse to it (the same way you would in the normal mode).
  - If the desired page is in the Customer area, 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 area 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).

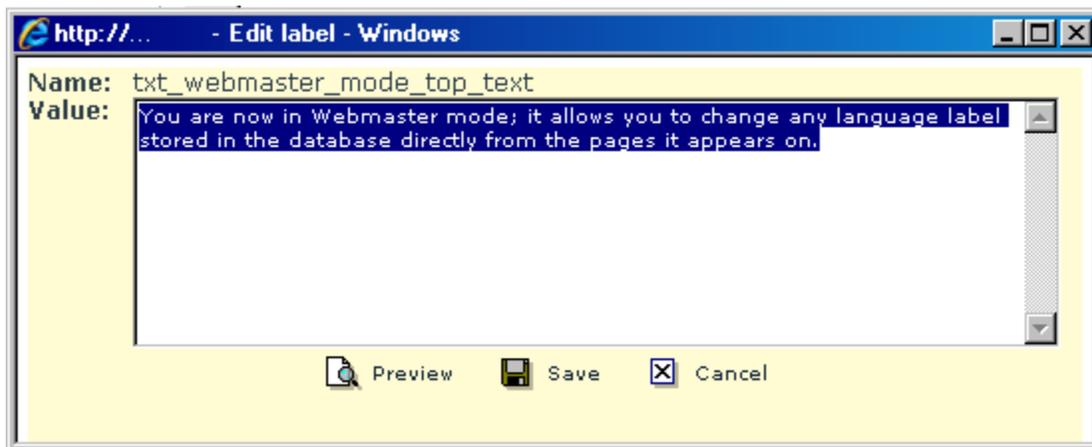
- (*In X-Cart PRO*): If the desired page is in the Provider area, open the Admin area in a new browser window or tab in the same session, then go to that new window or tab, edit the URL in the browser address bar so it points to the Provider area and press ENTER. After the Provider area authorization 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:

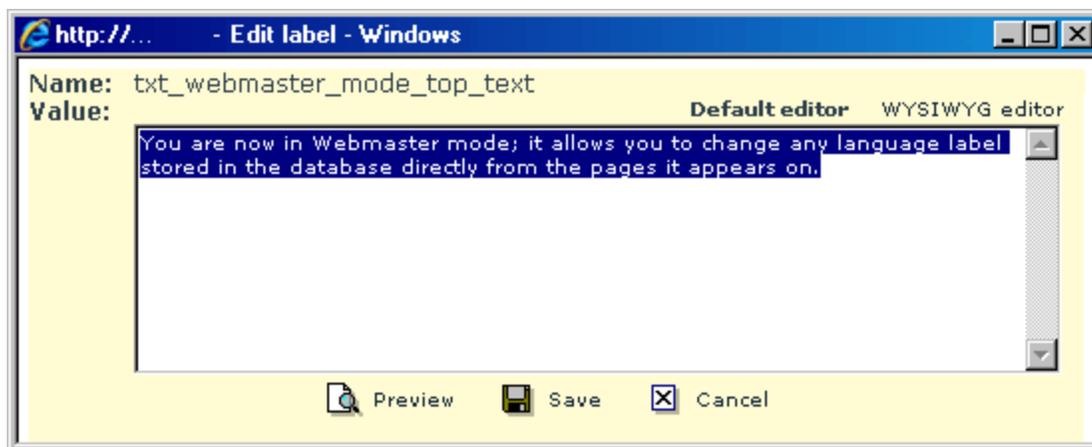


4. Edit the language variable value displayed in the 'Edit label' pop-up window and save the changes. For information on the 'Edit label' pop-up window, see the section [The 'Edit label' pop-up](#) below.

### 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 Admin area (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.

## 8.4 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.

**Note:** X-Cart out of the box does not support UTF-8 character encoding.

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 area. This selector is a simple drop-down box which may be labeled, depending on the area 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 area 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 Admin area. 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 area 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](#)).

## 8.4.1 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 area (Administration menu->Languages).
2. Scroll down to the 'Add/Update language' dialog box:

**Add/Update language**

Choose a language:

CSV delimiter:

**The source of import file:**

Server  
 Home computer

**CSV file is located on the server:**

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

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:

**Edit language**

Language:

CSV delimiter:

**Language options**

Charset:

Right-to-left text direction

**Note:** If you choose to use right-to-left direction, please make sure your store's skin set supports right-to-left mode.

If you need your text to be displayed in the right-to-left direction, select the 'Right to left text direction' check box.

**Important:** Before enabling right-to-left text direction, ensure that your store's skin set supports right-to-left mode.

**Note:** If you select the 'Right-to-left text direction' option, be aware that if 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.

Click the **Apply** button to save the changes.

2. Use the language selector at the top of the page to switch the current language of the Admin area 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:

The screenshot shows a dialog box titled "Edit language entries" with a sub-header "TOPIC: COUNTRIES". It contains two entries, each with a checkbox and a text box:

- country\_AD: The text box contains "Andorra".
- country\_AE: The text box contains "United Arab Emirates".

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](#)).

## 8.4.2 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 area (Administration menu->Languages).
3. Scroll down to the 'Add/Update language' dialog box:

**Add/Update language**

Choose a language:

CSV delimiter:

**The source of import file:**

Server  
 Home computer

**CSV file is located on the server:**

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

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.
  - 4) 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.
    - d) 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.

### 8.4.3 Exporting Languages

To export a language:

1. Go to the 'Edit languages' section of the Admin area (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". Inside the dialog box, there is a label "Language:" followed by a drop-down menu. The drop-down menu currently displays "Select one..." with a small downward-pointing arrow on the 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:

CSV delimiter:

---

#### Language options

Charset:

Right-to-left text direction

**Note:** If you choose to use right-to-left direction, please make sure your store's skin set supports right-to-left mode.

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.

## 8.4.4 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 area and (when X-Affiliate add-on module is used) of the Partner area.

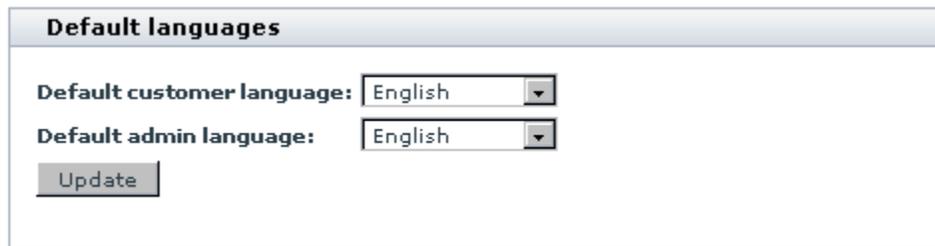
Default admin language is a language in which the user interface appears by default to users of the Admin area and (in X-Cart PRO) of the Provider area. It is also the language used for all email notifications to the Orders department.

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 the customer profile. 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 that was stored in the user profile.

To set the default admin/customer languages:

1. Go to the 'Edit languages' section of the Admin area (Administration menu->Languages). On

the page, find the dialog box titled 'Default languages':



**Default languages**

Default customer language: English

Default admin language: English

Update

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).

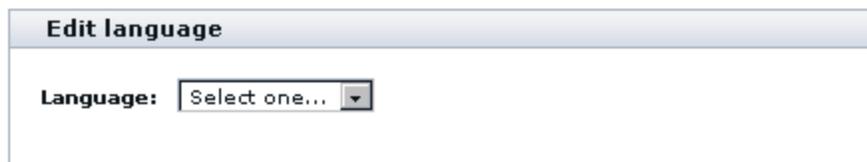
3. Click the **Update** button.

## 8.4.5 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 area (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.



**Edit language**

Language: Select one...

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

*Note: If you choose to use right-to-left direction, please make sure your store's skin set supports right-to-left mode.*

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.

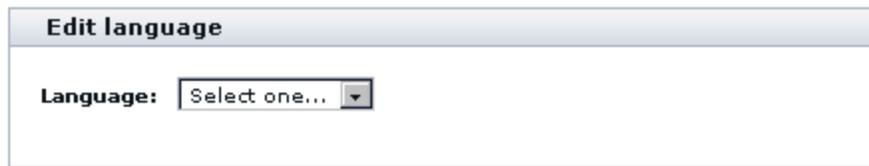
## 8.4.6 Deleting Languages

You can permanently delete languages that you do not need.

To delete a language:

1. Go to the 'Edit languages' section of the Admin area (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

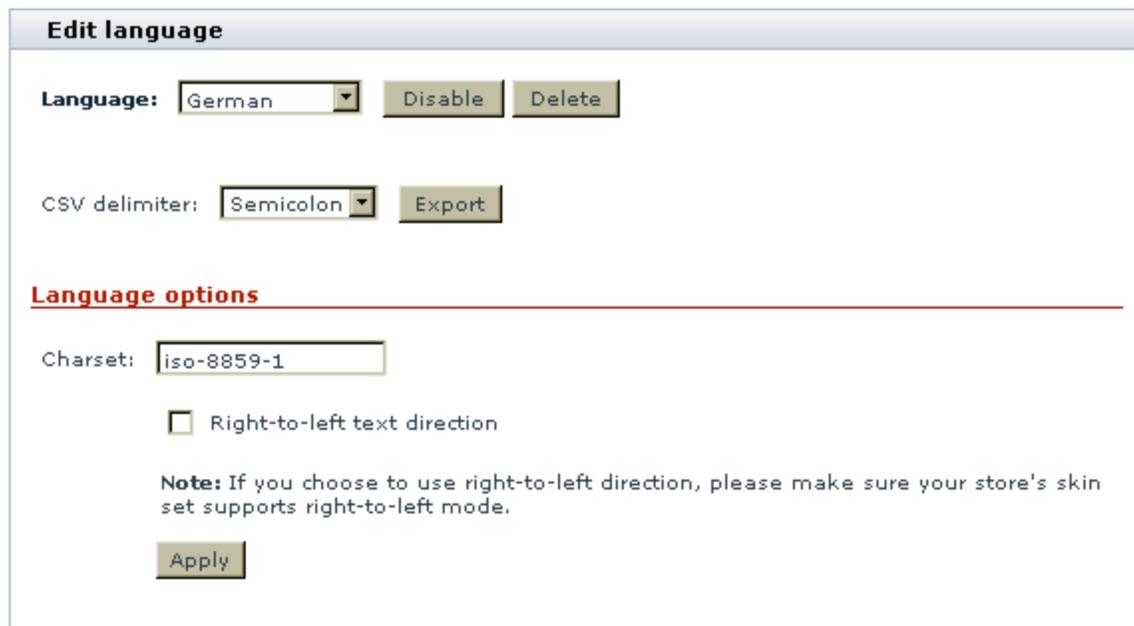
to delete.



**Edit language**

Language:

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:

CSV delimiter:

**Language options**

Charset:

Right-to-left text direction

**Note:** If you choose to use right-to-left direction, please make sure your store's skin set supports right-to-left mode.

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.

## 8.5 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](#).

### 8.5.1 Adding Static Pages

To add a new static page:

1. Go to the 'Static pages' section of your store's Admin area (Administration menu->Static pages ). A dialog box 'Static pages' opens.

**Static pages**

**Embedded level**

POS.	PAGE TITLE	SHOW LINK	STATUS
No embedded pages defined			

Add new...

**Root level**

POS.	PAGE TITLE	SHOW LINK	STATUS
No root pages defined			

Add new...

Find pages

2. (If your store supports more than one language) From the Language selector at the top of the 'Static pages' dialog box, select the language for which the static page is going to be added.
3. If you are creating an embedded page, click the **Add new...** button in the subsection 'Embedded level'. If you are creating a root level page, click the **Add new...** in the subsection 'Root level'.

A dialog box titled 'Static page details' opens.

4. In the 'Static page details' dialog box, provide the details of the static page being created (See [Defining Static Page Details](#)).
5. Click the **Save** button at the bottom of the 'Static page details' dialog box.

When you click on **Save**, the static page is created. A message is displayed confirming that the static page has been created successfully.

To return to the list of your store's static pages, click the **Pages list** link at the top of the 'Static page details' dialog box.

## 8.5.2 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 the **Save** button.

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 the **Delete selected** button.

## 8.5.3 Defining Static Page Details

The details of a static page are defined in the 'Static page details' dialog box:

**Static page details** [Pages list](#) >

**Level:** Embedded

**Page file:** \* /u/user/public\_html/skin1/pages/US/page\_001.html

**Page name:** \* Page1

**Clean URL:**   
[What is Clean URL?](#)  
**Note:** The Clean URLs functionality is now disabled. You can enable it through the [General settings > SEO options](#) section.

**Page content:** \* **Default editor** [WYSIWYG editor](#)  
Page1 content

**META keywords:**

**META description:**

**Status:** \* Enabled

**Position:** 10

**Show a link to the page in Help menu?:**

For an embedded static page, provide the following details:

- Page file: The filename for this static page.
- Page name: The name by which you and your customers will be able to identify this static page.

- Clean URL: The clean URL value for this static page. Instructions for adjusting this field are available in the section [Defining Clean URL Values](#) of this manual.

**Note:** The field 'Clean URL' needs to be adjusted only if X-Cart's Clean URLs functionality is enabled in your store. If the Clean URLs functionality is disabled, the field 'Clean URL' is inactive.

- Page content: The content/HTML code of this page.

**Note:** You can enter the content of the page in WYSIWYG mode if your store has the module HTML Editor enabled. For details, see the section [HTML Editor](#) in this manual.

- META keywords: The keywords to be used in the keywords meta tag of this static page.
- META description: The description to be used in the description meta tag of this static page.

For more information on using the description and keywords meta tags, see the section [Using HTML Meta Tags](#) of this manual.

- Status: This option allows you to specify whether this page must be available for viewing to the visitors of your store's Customer area.
- Position: The position of this static page in the list of static pages displayed in the 'Static pages' dialog box and (if the option 'Show a link to the page in Help menu?' is enabled) in the Help menu box of your store's Customer area.
- Show a link to the page in Help menu?: This option allows you to specify whether a link to this page must be included into the Help menu box of your store's Customer area.

For a root level static page, provide the following details:

- Page file: The filename for this static page.
- Page name: The name by which you will be able to identify this static page.
- Page content: The content/HTML code of this page.

## 8.5.4 Creating Versions of a Static Page for Other Languages

If your store supports more than one language, you must create the same static page in each of the supported languages.

To create a new language version of an existing static page:

1. Select the language in which the static page exists as current for the Admin area (Use the 'Current

language' selector).

2. Go to the 'Static pages' section.
3. In the 'Static pages' dialog box, find the page that you wish to translate into another language and click on its name. This opens the 'Static page details' dialog box with the details of the page you selected.
4. Switch the 'Current language' selector to the language into which you wish to translate the page.
5. In the 'Static page details' dialog box, edit the page details.

Provide a language-specific page name, page content, status and position.

For an embedded static page, provide language-specific meta keywords and meta description, and specify, whether a link to this language version of the page must be included into the Help menu box of your store's Customer area.

6. Click the **Save** button.

When you click on **Save**, the new language version of the page is created. A message is displayed confirming that the page has been updated successfully.

## 8.6 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](#).

## 8.6.1 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
<input type="checkbox"/>	10	Home	home.php	<input checked="" type="checkbox"/>
<input type="checkbox"/>	20	Shopping Cart	cart.php	<input checked="" type="checkbox"/>
<input type="checkbox"/>	30	Contact Us	help.php?section=contactus&mode=update	<input checked="" type="checkbox"/>

Delete selected
Update

**Add Link**


---

Add

2. (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.
3. 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 will 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).

4. Click the **Add** 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:

1. 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.
2. 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.
3. Click the **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.

## 8.6.2 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 **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 **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 **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 check box in the ACTIVE column opposite this link.

10. Click the **Update** button.

To delete one or more links from the speed bar:

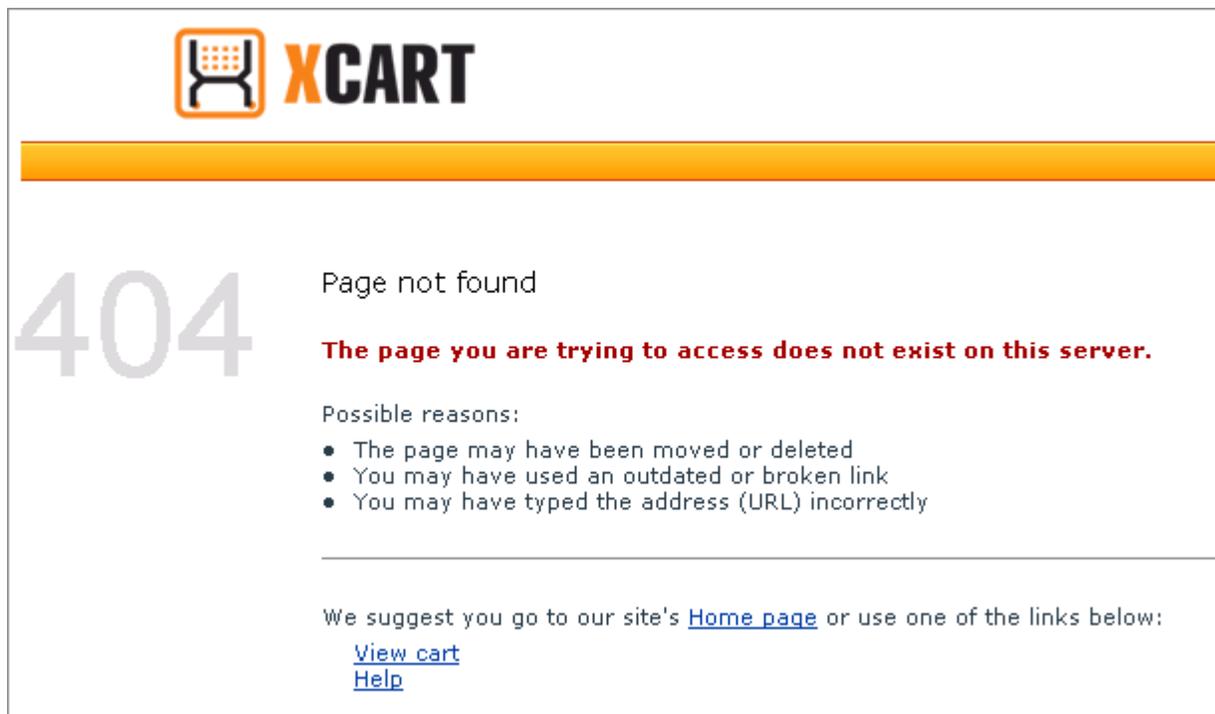
1. In the 'Speed Bar Management' dialog box, find the links that need to be removed from the speed bar and mark them for deletion by selecting the check boxes next to them.

2. Click the **Delete selected** button.

## 8.7 Adjusting the 404 Error Page

X-Cart provides a 404 error page. The 404 error page is a page used to display the 'Page not found' error message when a visitor attempts to access the store site using a URL for which no page exists. Typically, this happens if the URL being used is spelled wrong, or if the page being requested has been removed.

The 404 error page in X-Cart serves to provide a more user-friendly experience for your store's users: unlike the default 404 error message returned by the web server, it looks nice, follows the design of the other pages in your store, explains the problem in plain words and provides navigation links allowing the user to try other pages on your store site:



At any moment, you can view your store's 404 error page by pointing your browser to the location of your

store with the addition of /404.php. For example, if your store's URL is <http://example.com>, you can view its 404 error page by pointing your browser to <http://example.com/404.php>.

Please note that X-Cart's 404 error page does not work out of the box. To use it in your store, you need to enable it. The procedure is different depending on the web server you are using. Instructions for enabling the 404 page in X-Cart on the most popular web servers are available in the following sections:

- [Enabling X-Cart's 404 Error Page on Apache](#)
- [Enabling X-Cart's 404 Error Page on IIS](#)

X-Cart's 404 error page is easily customizable. To find out how you can change the content of your store's 404 error page, see the section [Customizing X-Cart's 404 Error Page](#).

The 404 error page included with the X-Cart distribution package is intended for the English language. If you wish to enable the users of your store speaking in languages other than English to read the contents of the 404 error page in their own languages, you must create a version of the

provide 404 error pages for languages other than English, you must create them. For instructions, see the section [Creating Versions of the 404 Error Page for Other Languages](#).

## 8.7.1 Enabling X-Cart's 404 Error Page on Apache

If you are using Apache web server, to enable use of X-Cart's 404 error page in your store, you must edit the .htaccess file located in your X-Cart installation directory as follows:

1. Uncomment the following line:

```
# ErrorDocument 404 /404.php
```

by removing the leading "#".

2. If your X-Cart is installed in a subdirectory (not in the root of the website), edit the uncommented line above to include the full relative path to the 404.php script.

For example, if your X-Cart is installed in the folder /store, so the store is available at the address <http://example.com/store/home.php>, the said line in your .htaccess file must read as follows:

```
ErrorDocument 404 /store/404.php
```

(Note the absence of "#" at the beginning of the line).

## 8.7.2 Enabling X-Cart's 404 Error Page on IIS

If you are using IIS web server and wish to use X-Cart's 404 error page in your store, you must configure IIS to use the file `<xcart_dir>/404.php` for the custom 404 error message.

In order to configure IIS, you must be an administrator of the web server (or a member of the Web Site Operators group) and have access to an IIS admin interface. If you do not have administrator privileges and/or physical access to the computer on which the server is run, you will have to ask your administrator to take these steps on your behalf.

To enable use of X-Cart's 404 error page on IIS, do the following:

1. In the Internet Information Services snap-in, select your website, right-click, and choose 'Properties'.
2. Select the 'Custom Errors' tab.
3. Select the HTTP error that you would like to change, in this case 404.
4. Click the **Edit Properties** button.
5. From the 'Message Type' drop-down box, select *File*.
6. Enter the full path that points to the file `<xcart_dir>/404.php`, or use **Browse...** to locate this file.
7. Click the **OK** button.

## 8.7.3 Customizing X-Cart's 404 Error Page

The content of X-Cart's 404 error page for the English language is defined by the file `404_US.html` located in the directory `/xcart/skin1/404/`. You can easily change the look and feel, as well as the textual content of your store's 404 error page by editing this file. The editing can be done in X-Cart's built-in template editor (see the section [Using X-Cart's Template Editor](#)), or in any decent external text editor.

## 8.7.4 Creating Versions of the 404 Error Page for Other Languages

If your store supports languages other than English, it is recommended you create a version of the 404 error page for each of the languages in your store. This way your store's non-English speaking users will be able to read the contents of the 404 error page in the language they use to view the rest of your store.

**Note:** Unless you provide a version of the 404 error page for each of the languages supported by your

store, in case of 404 error users that view your store in a language for which no 404 error page exists will be served the first available language version of the 404 error page that X-Cart will be able to find.

To create a version of the 404 error page for a language other than English, do the following:

1. Save the file 404\_US.html from the directory `/xcart/skin1/404` as 404\_XX.html, where XX is an ISO 3166-1 alpha-2 code of the country corresponding to the desired language.

In X-Cart, you can accomplish this using the 'Browse templates' section of your store's Admin area (Administration menu->Edit templates):

- a) Browse to the directory `/xcart/skin1/404`.
  - b) Select the radio button next to the filename 404\_US.html.
  - c) In the section 'Copy selected file to...', enter the filename for the new language version of the 404 error page. For example, if you wish to create a version of the 404 error page in German, you must use the filename 404\_DE.html.
  - d) Click the **Copy** button.
2. Open the file 404\_XX.html that has been created in a text editor. For example, you can use X-Cart's built-in template editor (See [Using X-Cart's Template Editor](#)).
  3. Edit the textual content of the 404\_XX.html file translating it from English into the desired language.
  4. Make sure the page for the language version you are creating uses the correct charset. The charset of X-Cart's 404 error page for the English language is specified in the 404\_US.html file as iso-8859-1. If the language into which you are translating this page uses a different charset, be sure to correct the encoding and charset values in your 404\_XX.html file.
  5. Save the file.

Now any users browsing your store in the language of 404\_XX.html who get a 404 error will be served the content of 404\_XX.html.

To make sure the 404 error page works properly for a specific language, do the following:

1. On any page within your store, switch the Language selector at the top of the page to the desired language.
2. Edit the URL in the address bar of your web browser so it points to any location that you know does not exist in your store.
3. Press ENTER.

As a result, you should see your store's 404 error page in the selected language.



## 9 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](#)
- [X-Cart's Advanced Tools](#)
- [System Fingerprints](#)
- [X-Cart's Script for Periodic Tasks](#)
- [Logs](#)
- [Images Location Management](#)
- [DB Backup/Restore](#)
- [Upgrading X-Cart](#)
- [Applying Patches](#)

### 9.1 Summary Page

X-Cart provides a page with a summary of information about the store - the so-called Summary page. You can use this page to learn about the current state of your store and to find out whether there are any inconsistencies in the store configuration. Depending on your access level, you may be able to view the following information:

- The store's Auth code;
- License info;
- General info;
- Payment methods info;
- Environment info.

**Note:** All the above sections are available to X-Cart GOLD users with administrator/provider privileges and X-Cart PRO administrators. X-Cart PRO providers can view only some of the General info.

To access the Summary page, do one of the following:

- *If you are an X-Cart GOLD administrator/provider or an X-Cart PRO administrator.* Click on the link 'Summary' in the Administration menu.
- *If you are an X-Cart PRO provider.* Click on the link 'Summary' in the Inventory menu.

Information about each of the sections on the Summary page is available below.

## Auth code

The top section of the Summary page provides your store's Auth code. It is a key code used to prevent unauthorized access to X-Cart's installation script `install.php`. When you re-install X-Cart, install an add-on or change your store's skin set, X-Cart requires you enter this code.

## License info

This section includes X-Cart's copyright information and provides two links:

- a link to the text of X-Cart's License Agreement,
- a link that you can use to verify your X-Cart license status.

## General info

This section tells you the following:

- **Single Store mode status** (*enabled or disabled*)

This entry is displayed only in X-Cart PRO. It shows whether Single Store mode is enabled.

**Note:** More info on [Single Store mode](#) is available in the section [Configuration file config.php](#).

- **Your store's open/closed status**

This entry shows whether your store is currently open to visitors or closed.

**Note:** Your store's open/closed status can be controlled using the option 'Check this to close your shop temporarily' in X-Cart's 'General settings/General options' section. For details, see the description of the option 'Check this to close your shop temporarily' in the section [General Options](#).

- **Date of your store's latest database backup**

If your store's database has ever been backed up using X-Cart's 'DB backup/restore' page, this entry displays the date when the backup was performed. The link 'click here to backup >>' displayed in this section allows you to go to the 'DB backup/restore' page.

- **Information on the number of products with a zero price**

This entry tells you how many of your products have a zero price. The link 'click here to check >>' allows you to view the list of products that have been detected to have a zero price.

**Note:** By products with a zero price X-Cart means only regular, non-configurable products whose base price OR the price of the default product variant is defined as 0 (zero). Regular products that have a non-default variant with a zero price and configurable products are not counted as products with a zero price.

- **Orders info**

This subsection provides a table with information about orders. In this table, you can see the number of processed, failed/declined, not finished and queued orders for specific periods (Since last login / Today / This week / This month).

- **Shipping methods info**

This subsection tells you the total number of enabled shipping methods and provides a table displaying the number of enabled shipping methods per carrier.

- **Shipping rates info**

This subsection tells you the total number of defined shipping rates and provides a table displaying the number of defined shipping rates per carrier. It also tells you the status of real-time shipping rates calculation (*enabled* or *disabled*).

## Clean URLs info

This subsection provides information about missing clean URLs. It tells you the overall number of products, categories, manufacturers and embedded static pages in your store and tells you, how many objects of each type do not have a clean URL value. If your store has any objects for which clean URL values are missing, you can use X-Cart's 'Generate clean URL values' tool to generate the missing clean URL values. The 'Generate clean URL values' tool is available in the 'Summary/Tools' section of the store's Admin area (See the section [Generate Clean URL Values](#)).

## Payment methods info

This subsection tells you whether the payment methods enabled at your store can be used on your system.

## Environment info

This subsection provides information about your store's environment.

## Directories that need to have write permissions

This subsection tells you the status of directories that must have write permissions.

## 9.2 X-Cart's Advanced Tools

X-Cart provides tools that allow you to perform a variety of advanced tasks:

- generate clean URL values for the object that do not have clean URL values defined;
- remove credit card information from processed and completed orders;
- optimize database tables to increase your store's overall performance;
- check database integrity;
- force (re)generation of cache files and quick tables;
- clear statistics;
- clear the templates cache;
- re-generate the cache of resized images;
- re-generate the Blowfish encryption key;
- remove unnecessary store data.

These tools are available via the 'Summary/Tools' section of your store's Admin area. To access the 'Summary/Tools' section, do the following:

1. Go to the 'Summary' section of your store's Admin area (Administration menu->Summary).
2. In the 'Summary' section menu, click the link Tools.

**Important:** To avoid loss of important data, make sure you clearly understand what you are doing before you use any of X-Cart's advanced tools.

### 9.2.1 Generate Clean URL Values

This tool automatically generates clean URL values for the products, categories, manufacturers and static pages that do not have clean URL values defined. This tool is available only when the option 'Enable Clean URLs' in the 'General settings/SEO options' section is enabled.

To generate clean URL values using this tool, do the following:

1. Specify the types of objects for which you wish clean URL values to be generated by selecting the respective check boxes:

**Generate clean URL values**

This tool automatically generates clean URL values for the products, categories, manufacturers and static pages that do not have clean URL values defined.

Generate clean URL values for Products

Generate clean URL values for Categories

Generate clean URL values for Manufacturers

Generate clean URL values for Static pages

2. Click the **Submit** button.

When you click on **Submit**, X-Cart generates URL values for all the objects of the selected type(s) that do not have clean URL values defined. A message is displayed confirming that the clean URL values have been generated successfully.

## 9.2.2 Remove Credit Card Information

This tool allows you to remove credit card data from processed and completed orders.

To use this tool, select the necessary options and click the **Apply** button:

**Credit card information removal**

Remove from customers' profiles

Remove from completed and processed orders

Remove from all orders

Save the last 4 digits of credit card numbers in order details

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.

Be careful when removing credit card information, this operation is irreversible.

**Note:** If you remove credit card information from orders, you will not be able to perform Capture or Void

transactions for Pre-Authorized orders created using NetRegistry or LinkPoint payment modules.

### 9.2.3 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.

### 9.2.4 Check Database Integrity

This tool allows you to improve the consistency and quality of data structures in your store's 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. Performing a database integrity check with X-Cart's 'Check database integrity' tool allows you to ensure that all the tables required for the store's operation are present in the MySQL database used by the store and helps you to detect any flaws and inconsistencies that may appear as a result of alterations to the database design caused by maintenance or new inclusions to the database structures performed bypassing X-Cart interface.

### 9.2.5 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 administrator has modified the database or some files manually, or you suspect that some data may have been calculated incorrectly due to an interrupted procedure.

## 9.2.6 Clear Statistics

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.

Please be careful when clearing statistics, this operation is irreversible.

## 9.2.7 Clear Templates Cache

This tool allows you to remove precompiled Smarty templates and free some disk space.

To use this tool, click the **Clear** button.

## 9.2.8 Re-generate the Image Cache

This tool allows you to re-generate the cache of resized images (for example, detailed product image thumbnails).

To re-generated the image cache, click the **Regenerate** button.

## 9.2.9 Re-generate the Blowfish Encryption Key

This tool allows you to generate a new Blowfish key and replace your current Blowfish key with it.

Your current Blowfish key is stored in the file config.php. To enable X-Cart to replace the current Blowfish key with a new one, you must set write permissions on the file config.php. On Unix this can be accomplished by using the following command:

```
chmod 666 config.php
```

Before you use this tool, you must **back up the file config.php and the database** of your store. This is essential, because if the re-generation procedure fails, you will not be able to log in to the store, and a lot of important information will be lost, including customer data and order details.

To use the tool, click the **Regenerate** button. After you click on **Regenerate**, X-Cart generates a new Blowfish key and starts re-encrypting the data encrypted by the old key using the new key. While X-Cart is performing the re-encryption, you can see the progress on the screen. Please be patient and allow sufficient time for the procedure to be completed.

**Important:** You must ensure that the re-encryption procedure runs uninterrupted up until the moment you see a message indicating its successful completion. If you happen to lose Internet connection, close the browser window or simply leave the page demonstrating the re-encrypting process before the procedure is successfully completed, you will lose all the data that has not been re-encrypted with the new Blowfish key.

## 9.2.10 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 the settings related to products, categories, manufacturers, shipping rates etc. 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.

## 9.3 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 Admin area:
  - 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 Admin area.

To delete a system fingerprint:

1. Open the 'System fingerprints' section of X-Cart Admin area:
  - 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 filename 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 Admin area.

To upload a system fingerprint to the directory `/xcart/var/log`:

1. Open the 'System fingerprints' section of X-Cart Admin area:
  - 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 filename 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 Admin area:
  - 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':

**Compare system fingerprints**

**Compare the current status with a system fingerprint**  
System fingerprint: 08-12-2005 14:02:58 - Fingerprint\_8Dec2005

**Compare system fingerprints**  
System fingerprint #1: 08-12-2005 14:02:58 - Fingerprint\_8Dec2005  
System fingerprint #2: 08-12-2005 14:02:58 - Fingerprint\_8Dec2005

**Select a file range to be displayed:**

Templates only  
 PHP scripts only  
 All files

Changed files  
 New files  
 Missing files  
 Unreadable files

Compare

**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.

## 9.4 X-Cart's Script for Periodic Tasks

X-Cart provides a script `cron.php` which you can use to launch execution of periodic tasks.

The tasks include:

1. Checking whether authorization has expired for any payment transactions in *Pre-authorized* status and setting the status of the respective orders to Declined.
2. Checking whether authorization is going to expire for any payment transactions in *Pre-authorized* status and sending email notifications thereof to the store's Orders department.

**Note:** You can define how many days in advance such notifications must be sent using the setting 'Number of days in advance that you want a reminder to be sent to the Orders department e-mail address about an order in Pre-authorized status for which the authorization period is going to expire' in the 'General settings/General options' section.

3. Sending out survey invitations (when X-Survey add-on module is used).

You can choose to launch the script `cron.php` from the command line or to set up X-Cart to launch this script automatically. Launching `cron.php` from the command line gives you a bit more control: you can decide exactly when you wish the script to be launched. Allowing X-Cart to launch this script automatically saves you time and effort: X-Cart will launch the script once per a predetermined number of user sessions.

If you choose to launch the script from the command line, you will need to adjust the setting 'Key for launch of the `cron.php` script' field in the 'General Settings/General options' section.

If you decide to set up X-Cart to launch `cron.php` automatically, you will need to adjust the setting 'Run the script that launches execution of periodic tasks once per N user sessions' in the 'General Settings/General options' section.

## 9.5 Logs

X-Cart logs are stored in the directory `/xcart/var/log`. 'Logs' section of your X-Cart based store's back end allows you to view and manage X-Cart logs via your store's interface.

To access 'Logs' section:

1. Go to the 'Summary' section of the store Admin area (Administration menu->Summary).
2. In the 'Summary' section menu, click the link Logs.

In the 'Logs' section, you can see a dialog box titled 'View shop logs':

**View shop logs**  
**Date period:**  All dates  This month  This week  Today  
 Specify the period below  
**Log date from:** December 03 2008  
**Log date through:** December 03 2008  
**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  
 Errors in the decryption of data  
 Benchmark reports  
 HTTPS module errors  
 GD extension errors  
 User activity with secured data  
**View N latest records:** 5  
Enter '0' (zero) to view all records

You can use this dialog box to view and manage X-Cart logs.

To view logs for a specific period:

1. Select the period for which you wish to view log records. Select one of the preset options (*All dates*, *This month*, *This week*, *Today*) or specify an exact period (Select *Specify the period below* and enter the desired period into the 'Log date from' and 'Log date through' fields).
2. Select the types of log records you wish to view (select the respective check boxes).

3. Use the 'View N latest records' field to specify how many records from each of the selected logs you wish to be displayed. For example, if you set this value to "5", X-Cart will display five most recent records from each of the logs you have selected. To view all records, set this value to "0" (zero).
4. Click the **Search** button.

When you click on **Search**, the selected log records are displayed in the 'Search results' section below.

To clear logs for a specific period:

1. Select the period for which you wish log records to be removed. Select one of the preset options (*All dates, This month, This week, Today*) or specify an exact period (Select *Specify the period below* and enter the desired period into the 'Log date from' and 'Log date through' fields).
2. Select the types of log records you wish to be removed (select the respective check boxes).
3. Click the **Clean selected logs** button.

When you click on **Clean selected logs**, the selected log records are removed.

## 9.6 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's 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 whether 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.

## 9.7 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](#)

### 9.7.1 Making a Backup Copy of the Database

To back up your database:

1. Go to the 'Database Backup/Restore' section of your store's Admin area (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)

**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.

**WARNING!** The maximum file size that can be uploaded: 10Mb.  
**Note:** Database restoration can take several minutes. Please be patient.

2. 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:*

- a) Click the **Generate SQL file** button
- b) When the 'Save file' window appears, use it to specify the filename 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:*

- a) Select the check box offering to write your backup file to xcart/var/tmp/xcartdump.sql.
- b) 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.

## 9.7.2 Restoring the Database from an SQL File

To restore your X-Cart database from a previously generated SQL file:

1. Go to the 'Database Backup/Restore' section of your store's Admin area (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 filename 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.

## 9.8 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. You can get an improved version of X-Cart software by upgrading.

For details, study the following sections:

- [Upgrading Within the Branch](#)
- [Upgrading Between Branches](#)

Upgrading is 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.

### 9.8.1 Upgrading Within the Branch

#### X-Cart upgrade packs

Upgrading within the same branch of X-Cart (for example, from 3.5.8 to 3.5.14, or from 4.0.6 to 4.0.17) is done using upgrade packs. An 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 area 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](#)).

### 9.8.1.1. 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 area 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.

### 9.8.1.2. 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 for the store 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 store (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.

### 9.8.1.3. 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:*

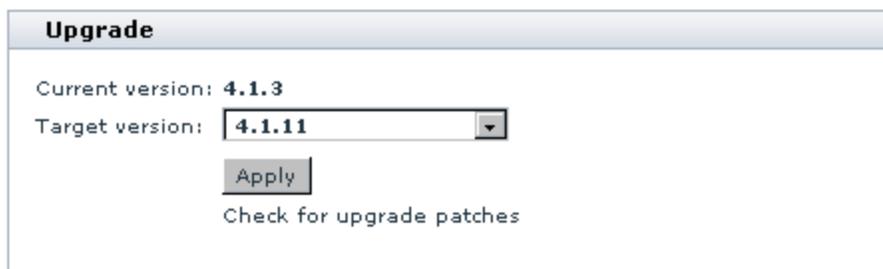
- a) Use an FTP client to upload the upgrade pack TGZ archive to the directory where your X-Cart is installed.
- b) Decompress the archive using one of the following commands:

```
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:



**Upgrade**

Current version: 4.1.3

Target version: 4.1.11

Apply

Check for upgrade patches

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 the **Apply** button.

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>

#### 9.8.1.4. 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 to each area 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 (for details, see the section [Installing X-Cart Manually](#)) and remove all the temporary files from the directory `<xcart>/templates_c`.

### 9.8.1.5. 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 area 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](#).

## 9.8.2 Upgrading Between Branches

When the store needs to be upgraded between branches, upgrading X-Cart with standard upgrade packs is not possible. All you can do is upgrade your existing database, install a new X-Cart version and use it with the upgraded database.

### Upgrading from the 3.5.x or 4.0.x branch to 4.1.x

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 Within the Branch](#).
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 package 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 package 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 check box '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.

## Upgrading from the 4.1.x branch to 4.2.0

To upgrade, follow these steps:

1. Upgrade your store to the latest version of the branch (4.1.12). For instructions, see the section [Upgrading Within the Branch](#).
2. Upgrade your store's database to 4.2.0. 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 `4.1.12-4.2.0_sql_upgrade.tgz`.

- 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 4.1.12 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 4.2.0:

- 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 X-Cart 4.2.0 from the distribution package and point it to the upgraded database:

Obtain a distribution package of X-Cart 4.2.0. While running the 4.2.0 installer, specify the upgraded database as the database to be used with the new installation. Also, select the check box 'Update config.php only' to keep the existing data.
  4. If your 4.1.x store has any customizations that you wish to use in the new 4.2.0 store, re-implement them in the new installation.

## 9.9 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.

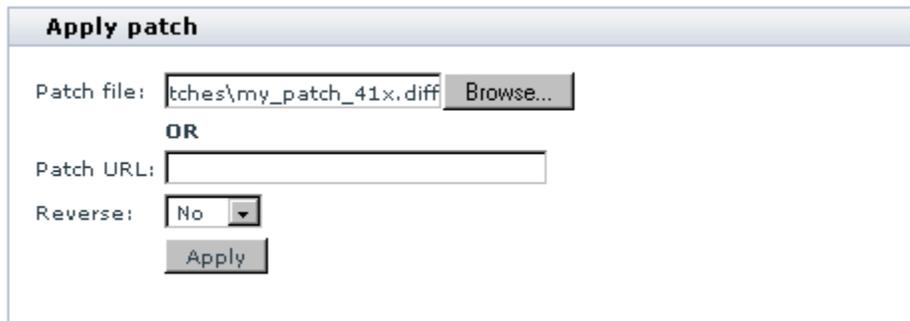
### 9.9.1 Applying File Patches

The 'Patch/Upgrade center' section of X-Cart allows you to apply file patches supplied by X-Cart developers using the Admin area 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 Admin area, by issuing the command 'patch' or manually.

### To apply a patch via X-Cart Admin area:

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 in to the Admin area of your X-Cart and go to the 'Patch/Upgrade' section. You see the 'Apply patch' form:



The screenshot shows a web form titled "Apply patch". It contains the following fields and controls:

- "Patch file:" followed by a text input field containing "tches\my\_patch\_41x.diff" and a "Browse..." button.
- "OR" centered below the first field.
- "Patch URL:" followed by an empty text input field.
- "Reverse:" followed by a dropdown menu currently set to "No".
- An "Apply" button at the bottom.

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 the **Apply** button.

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_centi.php ... OK
payment/cc_chargeit.php ... OK
payment/cc_delta.php ... OK
payment/cc_edinar.php ... OK
payment/cc_egateway.php ... OK
```

Patch results show what files the patch was successfully applied to, and what files failed to be patched. You can see patch log for details.

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.

## 9.9.2 Applying SQL Patches

The 'Patch/Upgrade center' section of X-Cart allows you to apply SQL patches to your database using the Admin area 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 in to 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 the **Apply** button.

5. The text of the patch will be shown to you in the 'Patch text' field.

Click on **Apply patch** to continue.

6. The results of patching your database will be shown to you.

**Applying patch**

**PATCH RESULTS**  
The database was successfully patched !

**PATCH LOG**  
Patch was applied successfully

If no errors occurred, click on **Finish**.



# 10 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](#)
- [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 Admin area (Administration menu->Modules).

## 10.1 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.

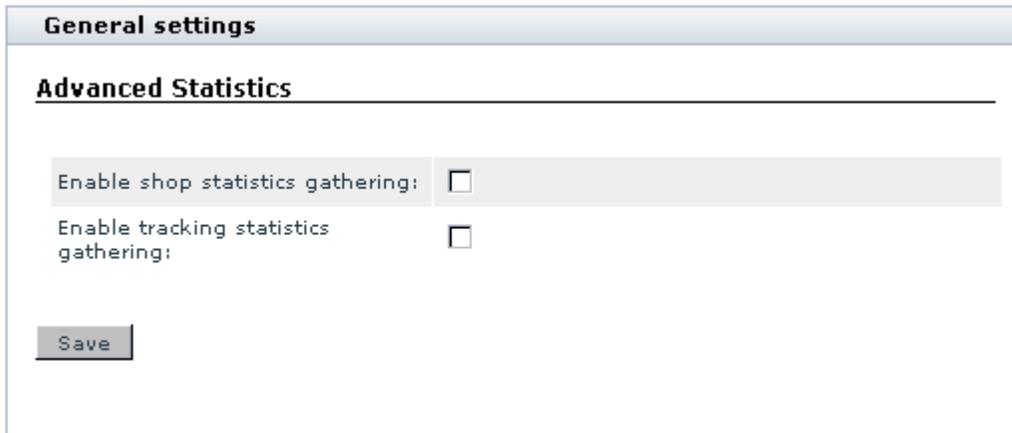
## 10.1.1 Enabling and Configuring 'Advanced Statistics'

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:



The screenshot shows a web interface for configuring the 'Advanced Statistics' module. The page is titled 'General settings' and 'Advanced Statistics'. It contains two checkboxes: 'Enable shop statistics gathering:' and 'Enable tracking statistics gathering:', both of which are currently unchecked. A 'Save' button is located at the bottom left of the form.

- a) Enable shop statistics gathering: Select this check box to start gathering shop statistics. Unselect to stop.
- b) Enable tracking statistics gathering: Select this check box to start gathering tracking statistics. Unselect to stop.
- c) Click the **Save** button to save the changes.

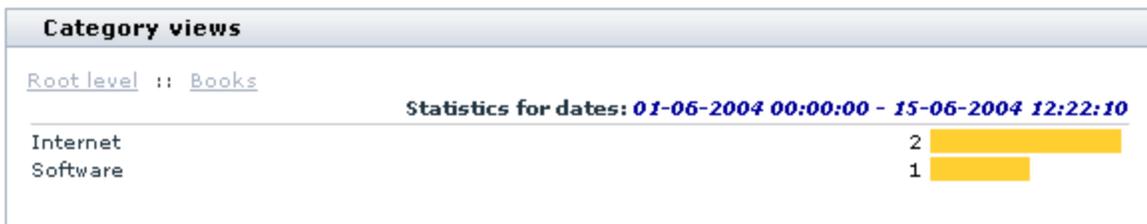
## 10.1.2 Understanding Shop Statistics

'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.

Deleted from the cart	
<b>Statistics for dates: 01-06-2004 00:00:00 - 15-06-2004 12:22:10</b>	
#67 Designing Web Usability	1 

'Referrer statistics' section allows you to find out what sites referred visitors to your store most effectively.

Referred from	
<a href="http://www.example.com/my_referrer/page.html">http://www.example.com/my_referrer/page.html</a>	1 

### 10.1.3 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. /home.php?cat=23 (7.00) 2. /home.php?cat=3 (3.00)	1	11.11
2	1. /home.php?cat=3 (3.00) 2. /home.php?cat=23 (7.00) 3. /home.php?cat=3 (3.00)	1	11.11
3	1. /home.php?cat=3 (3.00) 2. /home.php?cat=23 (7.00)	1	11.11
4	1. /home.php?cat=23 (7.00) 2. /home.php?cat=3 (3.00) 3. /home.php?cat=23 (7.00)	1	11.11
5	1. /home.php?cat=3 (3.00) 2. /home.php?cat=23 (7.00) 3. /home.php?cat=3 (3.00) 4. /home.php?cat=23 (7.00)	1	11.11
6	1. /home.php?cat=23 (7.00) 2. /home.php?cat=23 (2.00)	1	11.11
7	1. /home.php?cat=3 (3.00) 2. /home.php?cat=23 (7.00) 3. /register.php (0.00)	1	11.11
8	1. /home.php?cat=23 (7.00) 2. /home.php?cat=3 (3.00) 3. /home.php?cat=23 (7.00) 4. /register.php (0.00)	1	11.11
9	1. /home.php?cat=3 (3.00) 2. /home.php?cat=23 (7.00) 3. /home.php?cat=3 (3.00) 4. /home.php?cat=23 (7.00) 5. /register.php (0.00)	1	11.11

**Paths through site** - The sequence of pages a visitor views, from the entry page to the exit page.

**Average time** - The average time the visitors spend on each page in the specified path (in seconds).

**Visits** - The number of visits to the specified path.

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 page views			
PAGE URL	AVERAGE TIME	VISITS	%
1. /cart.php	4	21	42.86
2. /home.php	3	7	14.29
3. /home.php?cat=75	4	5	10.20
4. /product.php?productid=67	1	4	8.16
5. /register.php?	14	2	4.08
6. /home.php?cat=3	3	2	4.08
7. /home.php?cat=23	2	2	4.08
8. /register.php	72	1	2.04
9. /error_message.php?login_incorrect	34	1	2.04
10. /home.php?cat=79	5	1	2.04
11. /giftcert.php	3	1	2.04
12. /home.php?cat=243	2	1	2.04
13. /home.php?cat=81	2	1	2.04

**Page URL** - The URL of the page viewed by the visitor.  
**Average time** - The average time the visitors spend on the specified page (in seconds).  
**Visits** - The number of visits to the specified page.

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 to the store website.

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.

## 10.2 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.

## 10.2.1 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.qtmsoft.com>)
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 Service.

General settings	
<b>Antifraud Service</b>	
<b>General antifraud service options</b>	
Antifraud module subscription key	<input type="text"/>
Fraud risk factor threshold value (Antifraud module). If fraud risk factor is greater than this limit, order status will be 'Queued'	<input type="text" value="5"/>
Antifraud safe distance (km)	<input type="text" value="350"/>
Order total threshold (an order is considered large if the order total exceeds this amount)	<input type="text" value="500"/>
Run anti-fraud check on orders with zero 'order total'	<input checked="" type="checkbox"/>
Maximum fraud risk factor value after which an online payment transaction is performed in 'Auth only' mode, even if the payment module is set to work in a different mode (This setting is relevant only for the payment modules that support 'Auth only')	<input type="text" value="0"/>
<b>Email notifications</b>	
'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"/>
<input type="button" value="Save"/>	

a) Provide the following information:

#### General Antifraud service options

- Antifraud module subscription key: Your Antifraud module subscription key.
- Fraud risk factor threshold value (Antifraud module). If fraud risk factor is greater than this limit, order status will be 'Queued': 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.

- Antifraud safe distance (km): The distance between a billing address location and an IP address location that you wish to be treated 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.

- Order total threshold: The order subtotal amount starting from which an order must 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.
- Run anti-fraud check on orders with zero 'order total': This option allows you to specify whether you wish orders whose order total amount has been calculated as '0' (zero) to be screened by Antifraud service.
- Maximum fraud risk factor value after which an online payment transaction is performed in 'Auth only' mode, even if the payment module is set to work in a different mode: Orders with a fraud risk factor exceeding this value will be processed in 'Auth only' mode, even if the payment processor used for payment is set to work in 'Auth and Capture' mode.

#### Email notifications

- 'Antifraud service key is invalid' notification to orders department: This option allows you to specify whether you wish an email notification to be sent to the store's Orders department if the value entered into the 'Antifraud module subscription key' field is not a valid subscription key.
- 'Antifraud service key is expired' notification to orders department: This option allows you to specify whether you wish an email notification to be sent to the store's Orders department when your Antifraud module subscription key expires.

b) Click the **Save** button.

4. Define on which orders AntiFraud check should be performed:

a) Log in to your store's Admin area.

b) Go to the 'Payment methods' page.

c) Select the 'Check' check-box of the payment methods for which you want to use the AntiFraud check feature.

d) Click **Update** to apply the changes.

AntiFraud check will be performed on orders placed using payment methods which have the 'Check' setting enabled.

## 10.2.2 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: 'No information regarding requested IP is found'. 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: 'The order has not been checked by Antifraud service because Antifraud module was turned off at the time of order placement'.

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: '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)'. 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: 'Warning! Antifraud service key is invalid! You can purchase Antifraud Service subscription [here](#) or or get your trial key [here](#) (if it has not been used)'. 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.

### 10.2.3 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 displays a web interface for the 'IP Lookup service'. At the top left, there is a dropdown menu showing 'Queued'. Below it, the text 'Tracking number:' is followed by an empty text input field. Underneath that, the text 'IP: 111.111.111.111' is displayed, with a button labeled 'Lookup address' positioned below it. At the bottom of the interface, the text 'Order details (not visible to customer and provider):' is shown, followed by a large text area labeled 'Customer notes:'.

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'.

X-CART. Powerful PHP shopping cart software - Windows Internet Explorer

Antifraud service

**Lookup address**

IP:  City: \*

Proxy IP:  State: \*

Country: \*

Zip/Postal code: \*

The fields marked with \* are mandatory.

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:

IP:  City: \*

Proxy IP:  State: \*

City: La Verne Country: \*

State: CA Zip/Postal code: \*

Country: US

Zip/Postal code: Unknown

The fields marked with \* are mandatory.

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:

**Lookup address**

IP:	<input type="text" value="111.111.111.111"/>	City:	* <input type="text" value="Test city"/>
Proxy IP:	<input type="text"/>	State:	* <input type="text" value="CA"/>
City:	La Verne	Country:	* <input type="text" value="US"/>
State:	CA	Zip/Postal code:	* <input type="text" value="50001"/>
Country:	US		
Zip/Postal code:	Unknown	Distance:	2340 km

The fields marked with \* are mandatory.

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:

## 10.3 Bestsellers

### What Bestsellers module does

The module Bestsellers helps you to 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 status of the order containing this product is set to '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 area:

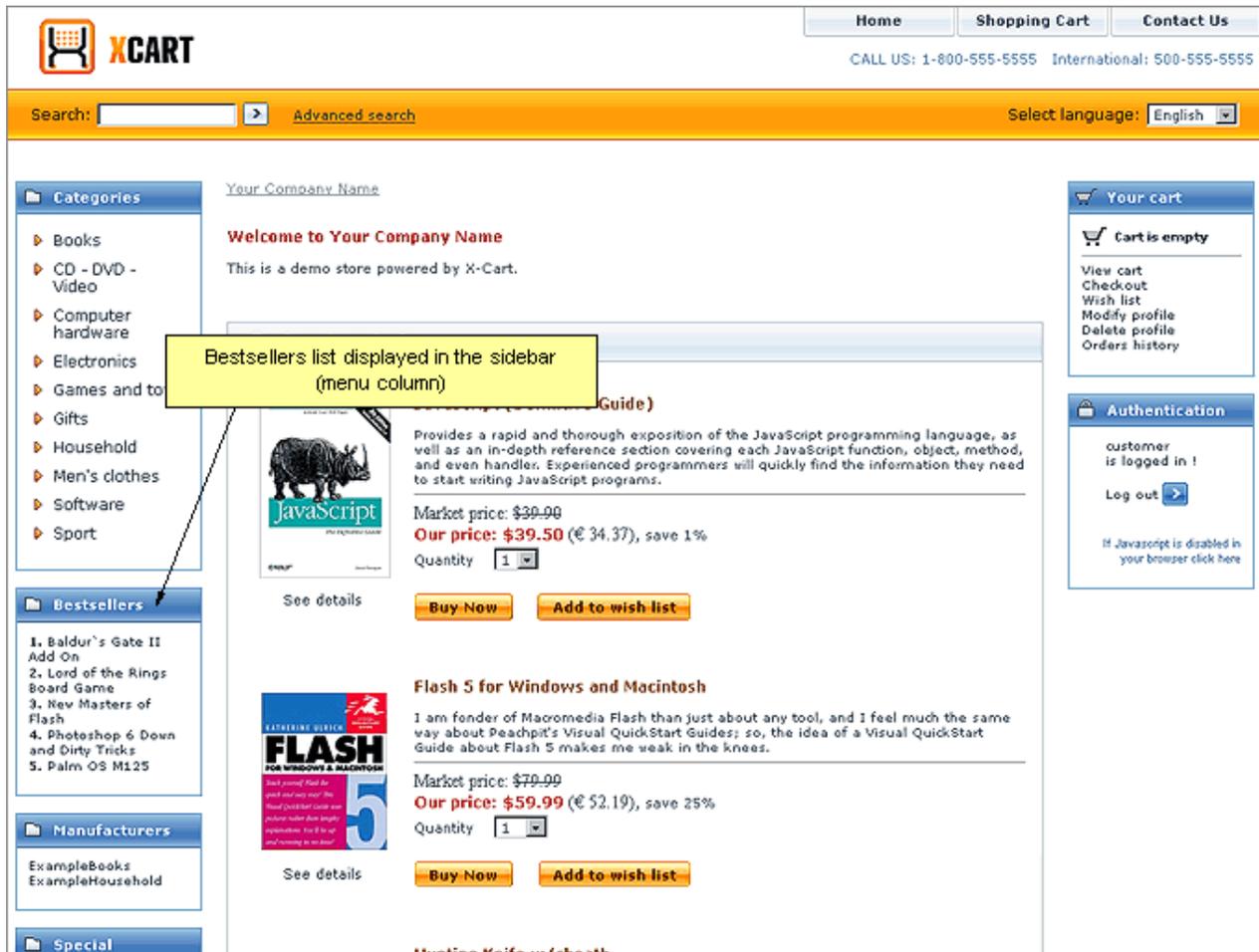
The screenshot displays the X-Cart storefront interface. At the top, there is a navigation bar with links for Home, Shopping Cart, and Contact Us, along with contact information: CALL US: 1-800-555-5555 and International: 500-555-5555. Below this is a search bar with a search button and a link to Advanced search, and a language selection dropdown 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, Gifts, 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.
- Welcome Message:** A central message area with the text "Welcome to Your Company Name" and "This is a demo store page".
- Bestsellers:** A central section displaying a list of best-selling products with their titles and prices:
  - Balder'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)
- Featured products:** A section highlighting a featured product, "Javascript (Definitive Guide)", with a description: "Provides a rapid and thorough exposition of the JavaScript programming language, as well as an in-depth reference section covering each JavaScript function, object, method, and even handler. Experienced programmers will quickly find the information they need".
- Your cart:** A sidebar section showing "Cart is empty" and options like View cart, Checkout, Wish list, Modify profile, Delete profile, and Orders history.
- Authentication:** A sidebar section showing "customer is logged in !" and a Log out button, along with a note: "If Javascript is disabled in your browser click here".

A yellow callout box with a black border points to the Bestsellers list, containing the text: "Bestsellers list displayed in the central area of the store's page".

or in the sidebar (menu column) of the Customer area:



**Note:** The section 'Bestsellers' is not displayed unless at least one of the products at the current level has been viewed by a customer.

## 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'](#))

### 10.3.1 Enabling and Configuring 'Bestsellers'

To begin using the module:

1. 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).

2. Enable Bestsellers module (Administration menu->Modules).

When the module is enabled, you can see: Bestsellers options section in General settings/Modules options.

3. Adjust the module settings via General settings/Modules options->Bestsellers options:

**General settings**

**Bestsellers**

Number of products in bestsellers list:  
**Note:** If the value of this option is 0, the Bestsellers list includes all the products from the category being viewed that have been sold at least once

Show thumbnails in bestsellers list (This option can be used only when the option 'Show bestsellers list in the menu column' is disabled):

Show bestsellers list in the menu column:

Save

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 the **Save** button.

## 10.4 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'.

The screenshot displays the X-Cart e-commerce interface. At the top, there is a navigation bar with links for Home, Shopping Cart, and Contact Us. Below this, a search bar and a language selector (set to English) are visible. 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, Gifts, Household, Men's clothes, Software, and Sport.
- Product Page:** The main product is 'Cranium'. It features a product image, a description: 'The outrageous new board game for your whole brain, containing 14 fun activities giving everyone a chance to shine.', and a price of \$34.99 (€30.44). The page also shows details like SKU (SKU92), quantity in stock (100), and weight (1.00 lbs). There is an 'Add to cart' button and a quantity selector set to 1.
- Your cart:** A sidebar section indicating 'Cart is empty' and providing links for View cart, Checkout, Modify profile, Delete profile, and Orders history.
- Authentication:** A sidebar section showing 'customer is logged in !' and a 'Log out' button.

The screenshot shows the 'Customer feedback' form. It is titled 'Customer feedback' and contains the following sections:

- Customer Reviews:** A section indicating 'There have been no reviews for this product.'
- Add your review here:** A section for submitting a new review. It includes:
  - Your name:** A text input field with an asterisk indicating it is required.
  - Product rating:** A dropdown menu currently set to 'Excellent!' with an asterisk indicating it is required.
  - Your message:** A large text area for the review content with an asterisk indicating it is required.
  - A note: 'Maximum review length is 2000 characters'.
  - An 'Add review' button.

At the bottom of the page, there is a footer with the text 'Powered by X-Cart shopping-cart-software' and 'Copyright © 2002-2008 Your Company Name'.

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

---

#### Customer Reviews

---

There have been no reviews for this product.

---

#### Add your review here

---

Your name: \*

Product rating: \*

Your message: \*

Excellent!  
Very good  
Good  
Fair  
Poor

Maximum review length is 2000 characters

The 'Customer Reviews' section allows customers to post their own reviews of a product:

### Customer feedback

---

#### Customer Reviews

---

There have been no reviews for this product.

#### Add your review here

---

Your name: \*

Product rating: \*

Your message: \*

Maximum review length is 2000 characters

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

---

#### Customer Reviews

---

**Product rating** ★★★★★

Author: **John Smith (j\_smith@example.com)**  
Great item, exactly as described, fast delivery. Highly recommended!

---

#### Add your review here

---

Your name: \*

Product rating: \*

Your message: \*

Maximum review length is 2000 characters

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](#)).

## 10.4.1 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 'Customer Reviews'. It is titled 'General settings' and has a sub-section 'Customer Reviews'. There are four settings:

Enable product ratings	<input checked="" type="checkbox"/>
Enable customer reviews	<input checked="" type="checkbox"/>
Who must be allowed to add ratings	Registered users
Who must be allowed to add reviews	Registered users

At the bottom left, there is a 'Save' button.

- a) Specify whether you want to enable your customers to rate products: select the "Enable product ratings" 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" 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 and see ratings: select *All users* or *Registered users* from the 'Who must be allowed to add ratings' selectbox.
- d) Specify who can create and see reviews: select *All users* or *Registered users* from the 'Who must be allowed to add reviews' selectbox.
- e) Click the **Save** button.

## 10.4.2 Managing Product Ratings

### Viewing product ratings from the Admin area

You can obtain comprehensive information about the product ratings posted by your customers via the 'Edit ratings' section of the the Admin area 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

	SKU	PRODUCT	REMOTE IP	VOTE
<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

	SKU	PRODUCT	REMOTE IP	VOTE
<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

	SKU	PRODUCT	REMOTE IP	VOTE
<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 ▼

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 Admin area.

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 the **Update** button.

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 the **Delete selected** button.

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).

## 10.4.3 Managing Customer Reviews

### Viewing customer reviews from the Admin area

You can view customer reviews for any product without leaving the Admin area.

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:

Edit reviews	
Check all / Uncheck all	
AUTHOR	MESSAGE
No reviews for this product	
<a href="#">Add new review</a>	
<input type="text"/>	<input type="text"/>
<input type="button" value="Add/Update"/>	

Then, as your store visitors begin posting reviews, reviews form a list in the upper part of the 'Edit reviews' dialog box:

### Edit reviews

Check all / Uncheck all

	AUTHOR	MESSAGE
<input type="checkbox"/>	John Smith (j_smith@example.)	Great item exactly as described, fast delivery. Highly recommended!
<input type="checkbox"/>	Jane Doe (jane_doe@example)	Excellent quality!

**Add new review**

## Adding customer reviews from the Admin area

You can use the 'Edit reviews' dialog box to add reviews of your own directly from the Admin area.

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 the **Add/Update** button.

Your review should be added to the list of customer reviews both in the Customer area and the store's Admin area.

## 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 the **Add/Update** button.

The edited review should be updated both in the Customer area and the Admin area.

## 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 area and the Admin area.

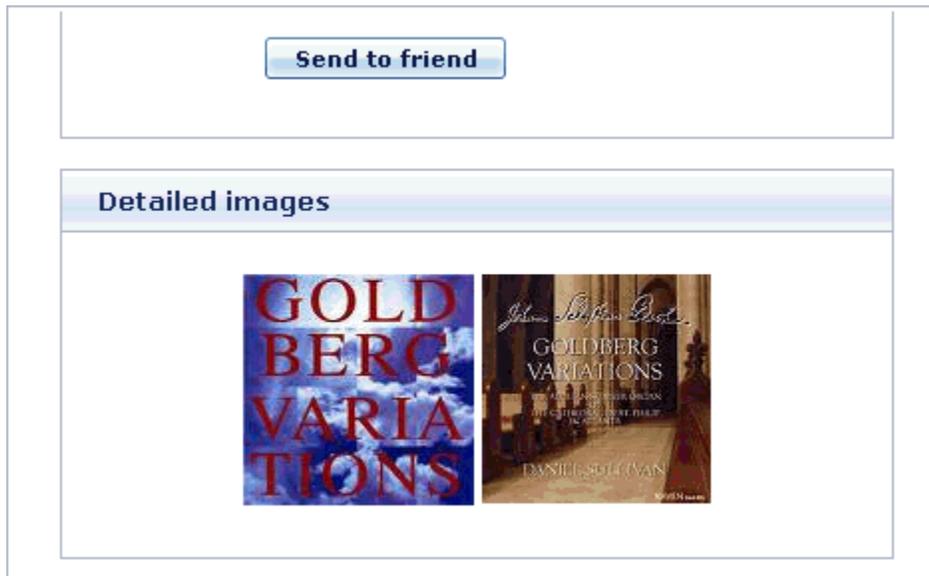
# 10.5 Detailed Product Images

## What Detailed Product Images module does

Detailed Product Images module allows you to add detailed images for products. A detailed product image is an image that helps a customer to get a better idea of a product by showing it in detail.

Depending on the module settings, detailed product images in your store can be displayed in one of the following display modes:

- Mode I: Detailed product images are displayed within the body of the Product details page in the Detailed images section.



- Mode II: Detailed product images are not displayed on the Product details page, but a link [View detailed images \(N\)](#), where N is the number of detailed images available for the product, is displayed below the product image.

### Bach's Goldberg Variations



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.

[View detailed images \(1\)](#)

#### Details

---

SKU	SKU76
Quantity in stock	100 item(s) available
Weight	1.00 lbs

**Price:**            **\$13.99** (€12.17)

#### Options

---

Quantity

[Add to cart](#)

When a customer clicks on the link, detailed product images are displayed in a pop-up window.

- Mode III: Detailed product image thumbnails are displayed below the product image.

### Bach's Goldberg Variations



[View detailed images \(1\)](#)



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	100 item(s) available
Weight	1.00 lbs

**Price:**      **\$13.99 (€12.17)**

---

**Options**

Quantity

Add to cart

When the mouse cursor is placed over a thumbnail, the corresponding detailed image is displayed in the place of the product image. When a customer clicks on a thumbnail, a pop-up window opens displaying the selected detailed image and the thumbnails of the other detailed images. Clicking on thumbnails inside the pop-up window opens the corresponding detailed images.

The pop-up window used to display detailed images is identical for Mode II and Mode III. It displays a full-sized detailed product image and a gallery of thumbnails of all the other detailed images of the product:



After opening this window, a customer can view any of the product's detailed images at full size by clicking on the respective thumbnail.

## 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](#)).

### 10.5.1 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	
<b>Detailed Product Images</b>	
Display detailed product images	<input type="text" value="in a popup window"/> <a href="#">Need help?</a>
Display detailed product image thumbnails below the product image (This setting is relevant only when detailed product images are displayed in a popup window)	<input type="checkbox"/>
Number of detailed image thumbnails that must be displayed in the thumbnail area	<input type="text" value="0"/>
Maximum width of a detailed product image thumbnail	<input type="text" value="64"/>
Maximum height of a detailed product image thumbnail	<input type="text" value="52"/>
<b>Note:</b> Readjusting the maximum dimensions of a detailed product image thumbnail will cause all the detailed product image thumbnails in your store to be re-generated.	
Number of detailed image thumbnails that must fit into the width of the thumbnail area	<input type="text" value="3"/>
<input type="button" value="Save"/>	

**Note:** While adjusting the module settings, please consider the recommendations provided in the section [Detailed Images: Performance Tips](#).

- Display detailed product images: This setting allows you to specify where you want detailed product images to be displayed. To adjust this setting, select either *within the body of the Product details page* or *in a pop-up window* from the drop-down box.
- Display detailed product image thumbnails below the product image: This option allows you to specify whether detailed product image thumbnails must be displayed in the thumbnail area (the area located below the product image on the Product details page). If this option is enabled, detailed product image thumbnails will be displayed in the thumbnail area below the product image. If this option is disabled, the thumbnails will not be displayed below the product image. This setting is relevant only when

detailed product images are displayed in a pop-up window.

- Number of detailed image thumbnails that must be displayed in the thumbnail area: This setting allows you to specify how many detailed image thumbnails you wish to be displayed in the thumbnail area (the area located below the product image on the Product details page). This setting is relevant only when detailed product image thumbnails are displayed below the product image. If you do not wish to limit the number of detailed image thumbnails displayed in the thumbnail area (i.e. if you wish to display thumbnails for all the detailed images of the product), set this value to '0' (zero).
- Maximum width of a detailed product image thumbnail, Maximum height of a detailed product image thumbnail: The maximum dimensions of a detailed product image thumbnail.

**Note:** Readjusting the maximum dimensions of a detailed product image thumbnail will cause all the detailed product image thumbnails in your store to be re-generated to fit the maximum dimensions.

- Number of detailed image thumbnails that must fit into the width of the thumbnail area: This setting allows you to specify how many detailed image thumbnails you wish to be displayed in one row of the thumbnail area (the area located below the product image on the Product details page). This setting is relevant only when detailed product image thumbnails are displayed below the product image.

3. Click the **Save** button.

## 10.5.2 Detailed Images: Performance Tips

When using X-Cart's Detailed Product Images module, remember that images require bandwidth. Using excessively large images or too many images may cause bandwidth waste and slow page load times for your customers. To ensure that your customers have a positive shopping experience while you are using Detailed Product Images, please consider the following recommendations:

- Avoid using excessively large images. Ensure that the average size of detailed product images used in your store does not exceed 1 Mb. Avoid using detailed product images whose dimensions exceed the average browser window size (1024 x 768 pixels). Remember that thumbnails also add to the weight of your store's pages, so make them small (if possible, no larger than 100 x 100 pixels).
- Keep the number of images displayed in a page within a reasonable limit (on average, 10-15 detailed images per product). If you are using the mode in which detailed product images are displayed within the body of the Product details page (Mode I), keep the number of detailed images per product to a minimum. If you are using the mode in which detailed product image thumbnails are displayed below the product image (Mode III), be sure to limit the number of thumbnails displayed in the thumbnail area (Set the 'Number of detailed image thumbnails that must be displayed in the thumbnail

area' to a reasonably small value).

- If you are using one of the modes in which detailed product images are displayed in a pop-up window (Mode II or Mode III), ensure that image caching is used on your system, and a full cache of reduced size detailed images is available at all times.

To be able to use image caching, X-Cart needs GDLib (GD extension for PHP) installed on the server and properly configured. While GDLib is available, every time a detailed product image is uploaded for a product, X-Cart generates two reduced size copies of this image: a thumbnail for use in Modes II and III, and an image for displaying in the place of the product image in Mode III. These reduced size copies of the detailed product image are saved to the image cache (the directories `/xcart/images/D/D.cache.dpthmbn` and `/xcart/images/D/D.cache.dpicon`, respectively). When a user views the 'Product details' page in Mode II or Mode III, these reduced size copies of the detailed image ensure that the full-sized image does not have to be loaded into the page till the user requests to view the image at full size. This saves bandwidth and reduces page load time. If, for some reason, a reduced size copy of a detailed image cannot be loaded from the image cache (for example, if the image cache is missing or corrupted), a full-size detailed image is loaded for every thumbnail; this causes a considerable slowdown in page loading. That is why it is very important that your store has a full image cache at all times. If you suspect a problem with your store's image cache, you can re-generate it at any time using the 'Re-generate the image cache' tool in X-Cart's 'Summary/Tools' section (See [X-Cart's Advanced Tools](#)).

### 10.5.3 Adding Detailed Images

The number of detailed images that you can add for a product, as well as the image size, are unlimited; however, before adding any detailed images, please consider the recommendations provided in the section [Detailed Images: Performance Tips](#).

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 opens a dialog box titled 'Detailed images'.

### Detailed images

**Note:** Detailed images will be displayed in a popup window. Please make sure the detailed images of products comply with the recommendations provided below:

- detailed images dimensions do not exceed the average browser window size (1024 × 768);
- there are not more than 10-15 detailed images per product;
- detailed images average size does not exceed 1 Mb.

Image	Pos.	Availability	Alternative text	Image properties
No images				

**Add new detailed image**

**Preview:** 

Select a file:

Alternative text:

3. Select an image to be uploaded:

- In the 'Add new detailed image' section of the 'Detailed images' dialog box, click on **Browse**. A dialog box titled 'Image selection' appears in a new window.
- 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).
- Click on **Apply**. The desired image appears in the 'Preview' subsection.

4. Click the **Upload** button. The image is added to the list of the product's detailed images.

### Detailed images

**Note:** Detailed images will be displayed in a popup window. Please make sure the detailed images of products comply with the recommendations provided below:

- detailed images dimensions do not exceed the average browser window size (1024 × 768);
- there are not more than 10-15 detailed images per product;
- detailed images average size does not exceed 1 Mb.

	Image	Pos.	Availability	Alternative text	Image properties
<input type="checkbox"/>		0	Enabled ▾		JPEG, 116×116, 5021b

---

**Add new detailed image**

**Preview:** No image available

Select a file:

Alternative text:

5. If necessary, change the details of the added detailed image:

- Set the position number for the detailed image (relative to the other detailed images of the same product).
- Enter alternative text for the image (will be shown in the place of the image if images are disabled in the web browser).
- Use the 'Availability' selectbox to specify whether the image should be displayed on the storefront or not.

Click the **Update** button to save the changes.

## 10.5.4 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 opens.
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 the **Update** button.

### Deleting detailed images

Detailed images that 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 opens.
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.

## 10.6 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 Goldenberg 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:** **\$25.98** (€ 22.60)

**Note:** Order total will be calculated more exactly after you log in.

Update  Clear cart

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

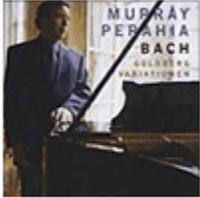
Submit

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 Goldenberg 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/>	
<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.

## 10.6.1 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					
<b>Add new coupon</b>					
<b>Coupon code:</b>	*	<input type="text"/>			
<b>Coupon type:</b>		<input type="text" value="% off"/>			
<b>Discount:</b>	*	<input type="text" value="0.00"/>			
<b>Times to use:</b>		<input type="text" value="1"/>	<input type="checkbox"/>	Per logged in customer	
<b>Status:</b>		<input type="text" value="Active"/>			
<b>Expires:</b>		<input type="text" value="Nov"/>	<input type="text" value="18"/>	<input type="text" value="2005"/>	
<b>Apply discount if:</b>		<input checked="" type="radio"/>	Order subtotal equals or exceeds the amount of... (\$)		
			<input type="text" value="0.00"/>		
		<input type="radio"/>	Cart contains the product...		
			<input type="text"/>		<input type="button" value="Browse..."/>
		<input type="radio"/>	Cart contains products from the category...		
			<input type="text" value="Books"/>		
			and its subcategories <input type="checkbox"/>		
<b>Note:</b> "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.					
<input type="button" value="Add coupon"/>					

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 logged in 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:

<b>Times to use:</b> <input type="text" value="1"/> <input type="checkbox"/> Per logged in 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:

<b>Times to use:</b> <input type="text" value="1"/> <input checked="" type="checkbox"/> Per logged in 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 the **Add coupon** button.

## 10.6.2 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"/>	FLASH	Active	\$5.00	\$0.00	0/10	15-12-2005 15:36:03
This coupon applies to orders which contain product #10 Discount is applied once per order						
<input type="checkbox"/>	FLASH2	Active	\$5.00	\$0.00	0/10	15-12-2005 15:36:03
This coupon applies to orders which contain product #10 Discount is applied to each item of this product						
<input type="checkbox"/>	CD	Active	\$2.00	\$0.00	0/10	15-12-2005 15:36:03
This coupon applies on orders which contain product(s) from category #105 Discount is applied once per order						
<input type="checkbox"/>	CD2	Active	\$5.00	\$0.00	0/10	15-12-2005 15:36:03
This coupon applies on orders which contain product(s) from category #105 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 the **Update** button.

### 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.

## 10.7 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.

**Availability:** Available for sale

**Details**

**SKU:** SKU83

**Product name:** ViaVoice Pro 7.0 Millennium Edition

**Search keywords:**

**ESD distribution:** /provider/via\_voice\_70.

**Short description\* :** <b>Features:</b><u> type="disc"><|>Use voice commands to control and navigate your desktop, applications, and the Internet<|>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<|>Explore specialized topics such as Cuisine, Chatters Jargon, Business & Finance. and Computer<|>Proofread your

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's 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.

**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.

### 10.7.1 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

Download key TTL (hours)	<input type="text" value="24"/>
Disable online payment methods for orders containing egoods	<input type="checkbox"/> <a href="#">Need help?</a>
Disable payment methods without manual processing or 'Auth only' mode for orders containing egoods	<input type="checkbox"/>

- **Download key TTL (hours):** The time period for which a download key sent to the customer of a ESD product must be valid.
- **Disable online payment methods for orders containing egoods:** This option allows you to specify whether you wish to allow customers ordering egoods to pay using an online payment method. If this option is enabled, all payment methods providing online payment processing will be made unavailable for orders containing egoods (In this case, you must ensure that at least one offline payment method is available at your store). If this option is disabled, payment methods providing online payment processing will be available, no matter whether the order contains egoods or not.
- **Disable payment methods without manual processing or 'Auth only' mode for orders containing egoods:** This option allows you to specify whether you wish to allow customers ordering egoods to pay using a payment method working in a mode other than 'Auth only'. If this option is enabled, customers ordering egoods will be able to use only payment methods that require manual processing of payments by the store administrator or those online payment processors that are set to work in 'Auth only' mode. If this option is disabled, customers ordering egoods will be able to use any payment method.

**Note:** If you wish to enable the option 'Disable payment methods without manual processing or 'Auth only' mode for orders containing egoods', you must disable the option 'Disable online payment methods for orders containing egoods'.

3. Click the **Save** button.

## 10.8 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:**

**Search keywords:**

**Short description\* :**

---

**Free shipping**

**Shipping freight (\$)**

**Apply global discounts**

**ISBN**

**Author**

Extra fields

↙ ↘

X-Cart supports product search by extra fields both in the Customer area and in the store's 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 the Customer area, 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 the Customer area.

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](#)).

### 10.8.1 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**

---

Extra fields limit (per provider):

Display default values in all extra fields for which non-default values have not been defined:

Click the **Save** button.

## 10.8.2 Adding Extra Fields

### Creating extra fields

To add an extra field:

1. Go to the 'Extra fields' section of the store's 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**

---

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's back end and in the Customer area).

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 area. Unselecting the check box hides the extra field from the Customer area, but leaves it available for editing in the store's 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 the **Add new** button. 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 area until you visit the Product details page of that product in the store's 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**

---

SERVICE\_NAME

2. 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's back end change to the language you selected.
3. 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.

4. Click the **Update** button to save the changes. The new values should be applied. You should see an Information box with a confirmation message.

### 10.8.3 Assigning Values to Extra Fields

To assign a value to an extra field:

1. Find the product for which you wish to define an extra field value and open the product for modification.
2. On the 'Product details' page, find the necessary extra field.
3. 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.
4. Click the **Save** button. The field value will be saved, and you should be able to see it in the Customer area.

## 10.8.4 Managing Extra Fields

### Editing extra fields

To edit a previously created extra field:

1. In the 'Extra fields' section of the store's 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's 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.

## 10.8.5 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).

## 10.9 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.



**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 Goldenberg 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.

  
**Your cart Personal details Shipping & Payment Place order**

**Personal details**

Returning customer	New customer
<p>If you already have an account, you can authenticate yourself by filling in the form below. The fields marked with * are mandatory.</p> <p><b>Login</b> * <input type="text" value="customer"/></p> <p><b>Password</b> * <input type="password" value="*****"/></p> <p><b>Submit</b></p> <p><b>Recover password</b> <a href="#">&gt;</a></p>	<p><b>New customer? Click here to register</b></p>

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

<p><b>Shipping Address</b></p> <p>10 Main street Fillmore Oklahoma United States 84631</p> <p><b>Modify</b> </p>	<p><b>Delivery method</b></p> <p><input checked="" type="radio"/> test_national - 10-15 days (\$1.00)</p>
<p><b>Billing Address</b></p> <p>10 Main street Fillmore Oklahoma United States 84631</p> <p><b>Modify</b> </p>	<p><b>Payment method</b></p> <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 the **Submit order** button.

## 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 Admin area (Administration menu->Modules).

## 10.10 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](#)).

## 10.10.1 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	
<b>Froogle/GoogleBase</b>	
Froogle/GoogleBase username:	<input type="text"/>
Froogle/GoogleBase password:	<input type="password"/>
Types of currency in which prices on your products need to be displayed in Froogle/GoogleBase. Must be accepted by your store.:	<input type="text" value="United States of America, Dollars"/>
Generate links to the HTTPS part of the store:	<input type="checkbox"/>
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.:	<input type="text"/>
Additional instructions to explain your payment policies:	<input type="text"/>
How many days the information on your products in Froogle/GoogleBase needs to be considered up-to-date:	<input type="text" value="1"/>
<input type="button" value="Save"/>	

- 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=40051>).
- 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 the **Save** button.

## 10.10.2 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's back end:
  - a) Open the 'Import/export data' section of the store's 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 ▾

Filename username.txt

Export
Download
Upload

3. Select a language to be used for export.

4. 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.

5. 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 a store administrator) or to the directory files/*your\_provider\_name* (if you are a provider).

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.

**Note:** learn how to upload export files using FTP here: <http://base.google.com/support/bin/topic.py?topic=2928>

**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.

## 10.11 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).

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

---

Your Company Name :: Checkout :: Payment details

**Categories**

- ▶ Books
- ▶ CD - DVD - Video
- ▶ Computer hardware
- ▶ Electronics
- ▶ Games and toys
- ▶ Gifts
- ▶ Household
- ▶ Men's clothes
- ▶ Software
- ▶ Sport

**Special**

- Gift certificates

**Help**

- Contact us
- Privacy statement
- Terms & Conditions

**Checkout: Step 1 of 2**

Qty	SKU	Product	Price	Total
<input type="text" value="1"/>	SKU65	New Masters of Flash	\$59.99	\$59.99
			<b>Subtotal:</b>	<b>\$59.99</b> (€ 52.19)
			<b>TOTAL:</b>	<b>\$59.99</b> (€ 52.19)

[Update](#)

**Payment method**

- Credit Card American Express
- Check Check payment
- Gift Certificate**
- Phone Ordering Phone: (555) 555-5555
- Fax Ordering Fax: (555) 555-5555
- Money Order US Banks Only
- Purchase Order

[Continue](#)

**Your cart**

**Items: 1**  
**Total: \$59.99**

View cart  
Checkout  
Wish list  
Modify profile  
Delete profile  
Orders history

**Authentication**

customer is logged in !

[Log out](#)

If Javascript is disabled in your browser click here

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
- ▶ Gifts
- ▶ Household
- ▶ Men's clothes
- ▶ Software
- ▶ Sport

**Special**

- Gift certificates

**Help**

Your Company Name :: Checkout :: Payment details

**Checkout: Step 1 of 2**

Qty	SKU	Product	Price	Total
<input type="text" value="1"/>	SKU65	New Masters of Flash	\$59.99	\$59.99
			<b>Subtotal:</b>	<b>\$59.99</b> (€ 52.19)
			<b>TOTAL:</b>	<b>\$59.99</b> (€ 52.19)

[Update](#)

Payment method: Gift Certificate

**Payment details**

Personal information:

Title: Mr.  
 First name: John  
 Last name: Smith  
 Phone: 927927927

**Your cart**

Items: 1  
**Total: \$59.99**

View cart  
 Checkout  
 Wish list  
 Modify profile  
 Delete profile  
 Orders history

**Authentication**

customer is logged in !

[Log out](#)

If Javascript is disabled in your browser click here

---

**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 ecommerce shopping cart software Copyright © 2005-2008 Your Company Name

Field for entering a gift certificate code

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 certificate verification' from 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.

**Categories**

- Books
- CD - DVD - Video
- Computer hardware
- Electronics
- Games and toys
- Gifts
- Household
- Men's clothes
- Software
- Sport

**Special**

- Gift certificates

**Help**

- Contact us
- Privacy statement
- Terms & Conditions

**Your cart**

Cart is empty

- View cart
- Checkout
- Wish list
- Modify profile
- Delete profile
- Orders history

**Authentication**

customer is logged in !

Log out

If Javascript is disabled in your browser click here

## 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).

## 10.11.1 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 area;
  - b) Gift certificates link in the Management menu in the store's 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	
<b>Gift Certificates</b>	
<b>General gift certificate options</b>	
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"/>
<b>Email notifications</b>	
Gift certificate notification to orders department:	<input checked="" type="checkbox"/>
Gift certificate notification to purchaser:	<input checked="" type="checkbox"/>
<input type="button" value="Save"/>	

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's 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.

## 10.11.2 Creating Gift Certificates

Normally, gift certificates are created by customers in the Customer area. 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 area.

To create a gift certificate:

1. Go to the Gift certificates section of the store Admin area (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):

**Gift certificates**

Check all / Uncheck all

ORDER	GIFTCERT ID	TYPE	STATUS	REM./AMOUNT	ADDED
There are no Gift Certificates.					

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*.

### 10.11.3 Managing Gift Certificates

Gift certificates can be managed using the 'Gift Certificates' section of the store's Admin area ( 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="#">8254725E47CFE753</a>	E-mail 	Pending	\$100.00/\$100.00	Your Company Name 04-12-2008 15:12:52
<input type="checkbox"/>	n/a	<a href="#">4D9546AB84F46807</a>	Mail	Pending	\$300.00/\$300.00	Your Company Name 04-12-2008 15:14:28
<input checked="" type="checkbox"/>	#1033	<a href="#">15FCE1A236D13D90</a>	E-mail 	Pending	\$150.00/\$150.00	<a href="#">John Smith</a> 04-12-2008 15:16:33

WARNING: When you update the status of a Gift Certificate to active, this certificate will be automatically sent to the recipient's e-mail.

**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: The ID of the order by which the gift certificate was purchased ('n/a' for gift certificates created by the store administrator, as no order is created when a gift certificate is created in the Admin area).
- 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: The 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: The 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: The 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: The name of the gift certificate sender + the 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** button.

When you click on **Update Gift Certificate**, the gift certificate is updated.

## 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** button.

When you click on **Update**, the statuses are updated.

## Printing gift certificates

To send gift certificates by mail, you first need to print them. It is possible to print only those gift certificates for which the delivery method has been specified as 'Send via Postal Mail'. You cannot print gift certificates for which the delivery method has been specified as 'Send via E-mail'.

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.

This opens the selected gift certificates in new browser windows. Now you can print the gift certificate page(s).

## Deleting gift certificates

The controls of the 'Gift certificates' section allow you to delete gift certificates created by the store administrator.

To delete one or more gift certificates:

1. In the 'Gift Certificates' section, find the gift certificates you wish to delete.
2. Click the **Delete selected** button.

When you click on **Delete selected**, the selected certificates are deleted.

Gift certificates created by customers cannot be deleted using the 'Gift certificates' section (You will notice that the check boxes next to such certificates are disabled). To delete a gift certificate created by a customer, you will need either to delete the order by which this gift certificate was purchased or to remove the gift certificate from the order using X-Cart's X-AOM add-on module.

## 10.11.4 Gift Certificate Templates

When creating a gift certificate to be sent by postal mail, the user must select a design template from the 'Template' field of the 'Gift Certificate details' dialog box. The selected template will define the look of the gift certificate card.

Gift Certificates module is shipped with two pre-designed templates for printable gift certificates: `template_sample_1.tpl` and `template_sample_2.tpl`. Gift certificate cards created using these

templates look as follows:



template\_sample\_1.tpl



template\_sample\_2.tpl

You can freely use X-Cart's pre-designed templates for gift certificates at your store.

Alternatively, you can create your own custom templates, or, at least, make some changes to the pre-designed ones. If you decide to customize the gift certificate templates at your store, you should know the following:

- The pre-designed templates `template_sample_1.tpl` and `template_sample_2.tpl` are stored in the directory `/skin1/modules/Gift Certificates`. It is the directory where X-Cart looks for gift certificate templates. If you create your own templates for gift certificates, you must put them into this directory. As soon as you add a design template file to the directory `skin1/modules/Gift Certificates`, it becomes available for selection from the 'Template' field of the 'Gift Certificate details' dialog box.
- If you wish, you can use external style sheets for your gift certificates. External style sheets for gift certificates must also be stored in the directory `/skin1/modules/Gift Certificates`. The pre-designed gift certificate templates `template_sample_1.tpl` and `template_sample_2.tpl` use the CSS files `template_sample_1.css` and `template_sample_2.css` respectively.
- To enable X-Cart to use your custom files for gift certificates, you must adhere to the following file naming conventions:
  - The name of a design template file for a gift certificate must include the prefix 'template\_' and end in `.tpl`; for example, `template_certificate1.tpl`.
  - (If you use CSS files) The name of a CSS file must be identical to the name of the template file for which it is used in all but the file extension (the CSS file must end in `.css`). For example, for a file

named `template_certificate1.tpl`, the CSS file must be named `template_certificate1.css`.

## 10.12 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'](#)).

### 10.12.1 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. In this segment, you will find your account number (find a line:

```
var pageTracker = _gat._getTracker("UA-xxxxxxx-x");
```

The value replaced by "UA-xxxxxxx-y" in the example is your account number). You will need to enter this

number 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 Admin area 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

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 tracking code block in which you will easily find your account number. The Google Analytics account number 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.

Google Analytics account number

Use E-Commerce analysis

- a) Google Analytics account number: Copy your account number 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.

## 10.13 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'](#)).

## 10.13.1 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 Admin area.

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 Admin area 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 Admin area 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.

## 10.13.2 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.

### 10.13.3 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 Admin area, 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.

## 10.13.4 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 allows customers to use discount coupons created by the X-Cart administrator. However to redeem a discount coupon, your customers will be supposed to enter its code using a field on Google Checkout's Place Order page. Coupons entered on X-Cart checkout pages will not be used. Merchants in the U.K. cannot yet use the Merchant Calculations API to calculate coupons or gift certificates, for more details please refer to: [http://code.google.com/apis/checkout/developer/index.html#coupons\\_and\\_discounts](http://code.google.com/apis/checkout/developer/index.html#coupons_and_discounts).
- 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.

## 10.13.5 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 Admin area.

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/v
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).

## 10.13.6 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.

## 10.14 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 storefront interface. At the top, there are navigation links for Home, Shopping Cart, and Contact Us, along with contact information: CALL US: 1-800-555-5555 and International: 500-555-5555. A search bar and a language selector (set to English) are also visible. The main content area features a personalized welcome message: "Welcome back, John Smith" in red text, with a yellow callout box pointing to it that says "When a registered user returns to the store, he or she is greeted by the name". Below the welcome message, it states "This is a demo store powered by X-Cart." The featured products section displays a book titled "Javascript (Definitive Guide)" with a price of \$39.50 (save 1% from the market price of \$39.90). The right sidebar contains sections for "Your cart" (showing it is empty) and "Authentication" (showing the user is logged in).

**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

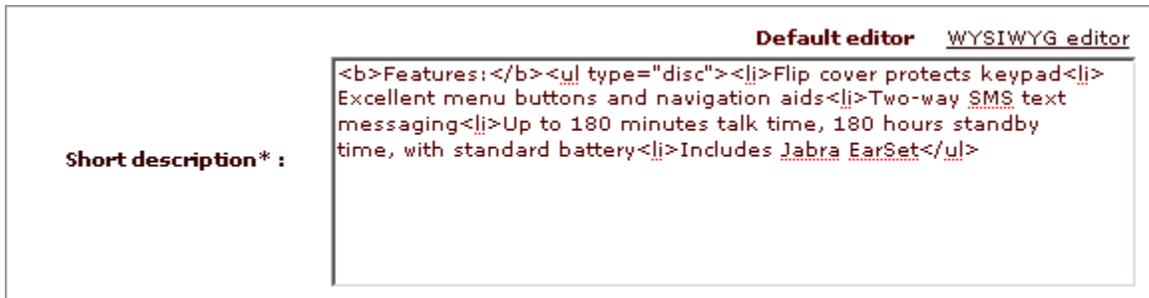
If you are an X-Cart GOLD administrator/provider or an X-Cart PRO administrator:

- You can enable/disable the module Greet Visitor via the Modules section of X-Cart Admin area (Administration menu->Modules).

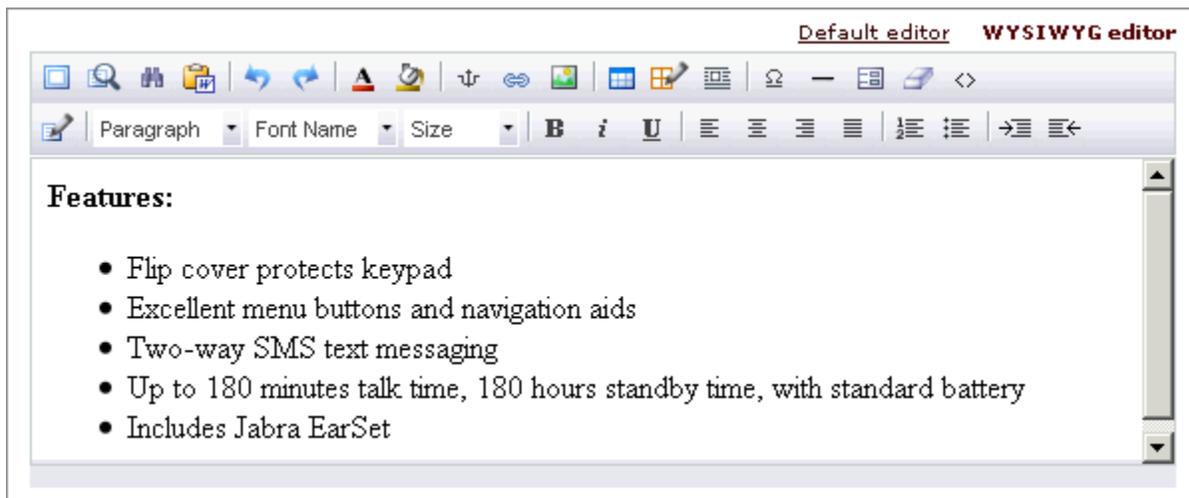
## 10.15 HTML Editor

### What HTML Editor module does

HTML Editor allows to edit text fields which include formatted text in WYSIWIG mode, without having to spell out HTML tags. Click the 'WYSIWIG editor' link above such a field to open the editor window.



When the editor window opens, you can use all the controls on the toolbar to format text the way you want it to look like.



The functionality is similar to most text editors. Place the mouse cursor over a button to see a tooltip with a hint, what this buttons does.

### Roles in HTML Editor module management

If you are an X-Cart GOLD administrator/provider or an X-Cart PRO administrator:

- You can enable/disable the module HTML Editor via the Modules section of X-Cart Admin area (Administration menu->Modules).

## 10.16 Image Verification

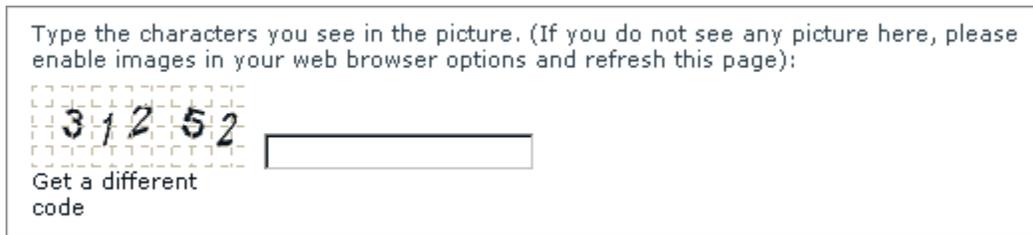
### What Image Verification module does

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'](#)).

### 10.16.1 Enabling and Configuring 'Image Verification'

X-Cart's 'Image Verification' module requires GDLib (GD extension for PHP). Before enabling the module, please ensure that GDLib is installed and properly configured on your system.

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

##### Image generator options

Image generator:	default ▾
Type of string that should be used for the image:	Numbers only ▾
Length of string:	5
The code must be case sensitive:	<input type="checkbox"/>

##### Where to display

On Registration page:	<input type="checkbox"/>
On pages with an authentication form (after 3 unsuccessful attempts to log in):	<input checked="" type="checkbox"/>
On Contact us page:	<input checked="" type="checkbox"/>
On Send to friend page:	<input type="checkbox"/>
On customer reviews page:	<input checked="" type="checkbox"/>
On news subscription page:	<input checked="" type="checkbox"/>

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.

## 10.17 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'](#)).

## 10.17.1 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. The window title is 'General settings'. Below the title bar, the section is titled 'Interneka'. There are three main input areas: a text box for 'Enter your Interneka ID:', a checkbox for 'Check this to enable 'per Sale, %' payment model:' which is checked, and another checkbox for 'Check this to enable 'per Lead, \$' payment model:' which is also checked. 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 the **Save** button.

## 10.18 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'](#))

### 10.18.1 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

---

Periodic sending of e-mails to the store administrator about the store activity: Once a day ▾

Periodic e-mail sending mode: Manual ▾

Include messages from shop logs into periodic e-mails:
 

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

Include site visits statistics into periodic e-mails:

Include orders statistics into periodic e-mails:

- 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 the **Save** button.

## 10.19 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', 'SonyEriccson', 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):

The screenshot displays the X-Cart v.4.2.3. Customer area sidebar. The sidebar is divided into several sections:

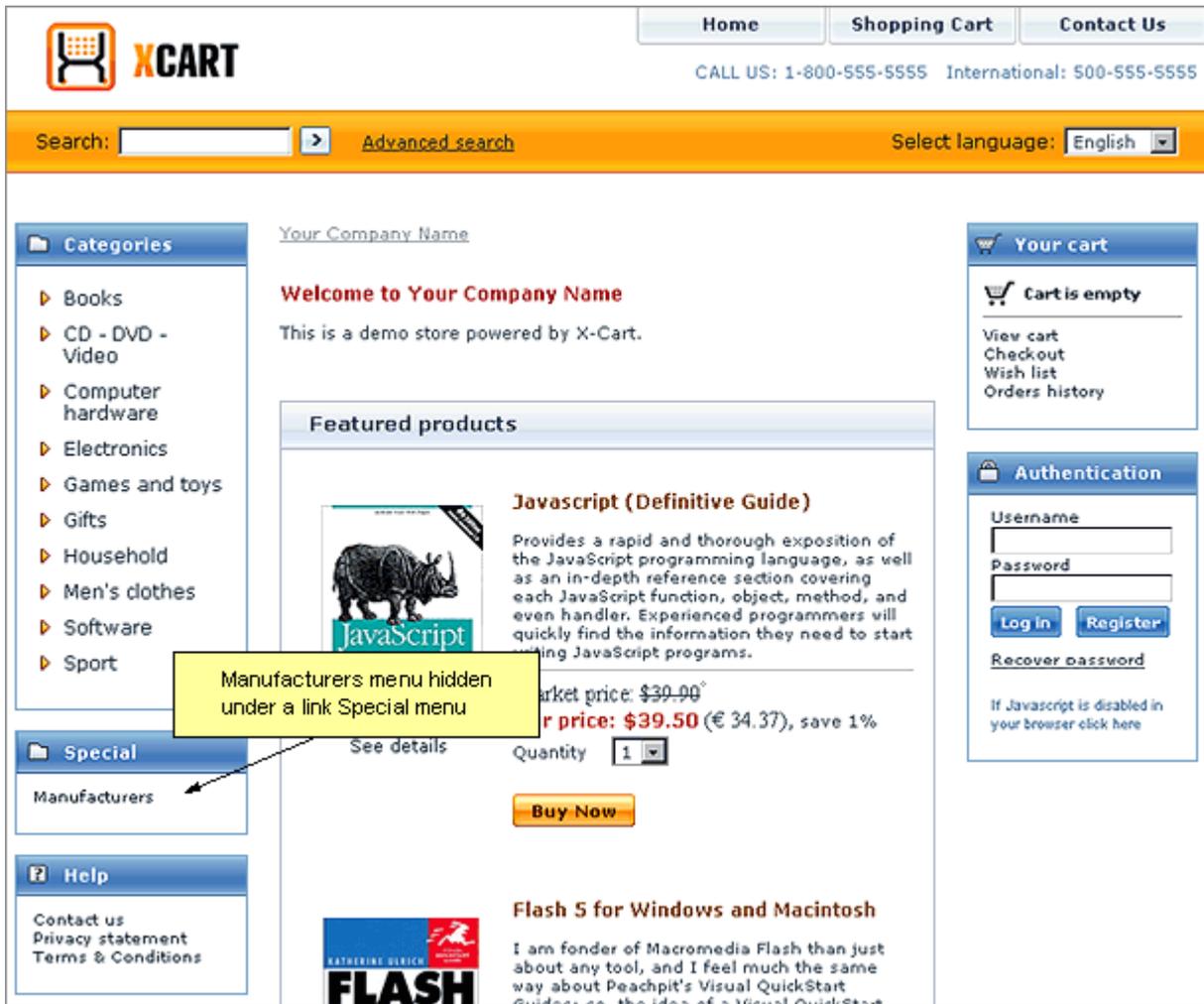
- Categories:** A list of product categories including Books, CD - DVD - Video, Computer hardware, Electronics, Games and toys, Gifts, Household, Men's clothes, Software, and Sport.
- Manufacturers:** A section containing a list of manufacturer names: ExampleBooks and ExampleHousehold. A yellow callout box with an arrow pointing to this section contains the text: "Manufacturers menu displayed in the sidebar (menu column)".
- Help:** A section containing links for Contact us, Privacy statement, and Terms & Conditions.

The main content area of the page shows a "Featured products" section with two items:

- Javascript (Definitive Guide):** A book with a rhinoceros on the cover. The price is \$39.50 (€ 34.37), save 1% from a market price of \$39.99. A "Buy Now" button is visible.
- Flash 5 for Windows and Macintosh:** A book with a red and white cover. The market price is \$79.00.

Other elements visible in the screenshot include the X-Cart logo, navigation links (Home, Shopping Cart, Contact Us), a search bar, a language selector (English), and a "Your cart" section showing an empty cart.

or be hidden under the Manufacturers link of the Special menu:



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 displays the X-Cart storefront interface. At the top, there are navigation links for 'Home', 'Shopping Cart', and 'Contact Us', along with contact information: 'CALL US: 1-800-555-5555 International: 500-555-5555'. A search bar is located below the navigation, with a 'Search:' label, a text input field, and a 'Search' button. To the right of the search bar is a 'Select language:' dropdown menu set to 'English'. The main content area is divided into several sections:

- Categories:** A list of product categories including Books, CD - DVD - Video, Computer hardware, Electronics, Games and toys, Gifts, Household, Men's clothes, Software, and Sport.
- Manufacturers:** A list of manufacturer categories including ExampleBooks and ExampleHousehold.
- Help:** Links for Contact us, Privacy statement, and Terms & Conditions.
- Your Company Name :: Manufacturers :: ExampleBooks:** A section for the manufacturer, showing the URL 'www.example.com' and a description 'My description of the manufacturer.'
- ExampleBooks Product Listing:** A list of products from the manufacturer. The first product is 'New Masters of Flash', with a description: 'Learning by doing is always good, especially if you have good role models to follow. As part of the publisher's "Shoving It" series, this book brings together 19 of the most innovative designers who are working in motion graphics, and gives them lots of page room to talk about their work in general.' The market price is \$70.00, and the current price is \$59.99 (€ 52.19), representing a 25% discount. A quantity selector is set to 1, and a 'Buy Now' button is present. The second product is 'Professional Java Server Programming', with a description: 'Wrox specializes in books written by programmers, for programmers. Professional Java Server Programming, a volume on developing Java-based Web applications, is...'
- Your cart:** A section indicating 'Cart is empty' and providing links for 'View cart', 'Checkout', 'Wish list', and 'Orders history'.
- Authentication:** A section for user login and registration, including fields for 'Username' and 'Password', 'Log in' and 'Register' buttons, and a 'Recover password' link. A note at the bottom states: 'If Javascript is disabled in your browser click here'.

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.

## 10.19.1 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

Manufacturers list limit (leave empty if unlimited):	<input type="text" value="10"/>
Show manufacturers list in the menu column:	<input type="checkbox"/>
Manufacturers per page:	<input type="text" value="25"/>

- 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.
- 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.
- 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 area.
- Click the **Save** button.

## 10.19.2 Adding Manufacturers

To add a manufacturer category:

- Open the 'Manufacturers' section of the store's 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.

In this section, a dialog box titled 'Manufacturers list' is displayed:



2. In the 'Manufacturers list' dialog box, click the **Add new...** button. This opens a dialog box titled 'Manufacturer details'.
3. In the 'Manufacturer details' dialog box, provide the details of the manufacturer category being created (See [Defining Manufacturer Details](#)).
4. Click the **Save** button.

When you click on **Save**, the new manufacturer category is created. A message is displayed confirming that the manufacturer category has been created successfully.

To add another manufacture category, click the **Add Manufacturer** link at the top of the 'Manufacturer details' dialog box.

To return to the list of manufacturers, click the **Manufacturers list** link at the top of the 'Manufacturer details' dialog box.

## 10.19.3 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 the **Update** button.

The order of the manufacturer categories in the Customer area 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 the **Update** button. 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 the **Save** button. 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 the **Delete selected** button. The selected manufacturer categories should be removed. You should see an information box with a confirmation message.

## **10.19.4 Defining Manufacturer Details**

The details of a manufacturer category are defined in the 'Manufacturer details' dialog box:

### Manufacturer details

[Manufacturers list](#) > [Add Manufacturer](#) >

Language: English ▼

**Manufacturer:** \*

**Clean URL:**

[What is Clean URL?](#)  
**Note:** The Clean URLs functionality is now disabled. You can enable it through the [General settings>SEO options](#) section.

**Logo:**

No image available

**Default editor** [WYSIWYG editor](#)

**Description:**

\*\*you can put your description here\*\*

**URL:**

**META keywords:**

**META description:**

**OrderBy:**

**Availability:**

To define the details of a manufacturer category, complete the following fields:

- **Manufacturer:** The name by which you and your customers will be able to identify this manufacturer

category.

- Clean URL: The clean URL value for this manufacturer category. Instructions for adjusting this field are available in the section [Defining Clean URL Values](#) of this manual.

**Note:** The field 'Clean URL' needs to be adjusted only if X-Cart's Clean URLs functionality is enabled in your store. If the Clean URLs functionality is disabled, the field 'Clean URL' is inactive.

**Note for X-Cart PRO users:** The 'Clean URL' field is available only to store administrators, as only administrators can define clean URLs for manufacturers.

- Logo: The image that will be displayed as the manufacturer's logo.
- Description: The description of the manufacturer (will be displayed to customers).

**Note:** You can enter the description in WYSIWYG mode if your store has the module HTML Editor enabled. For details, see the section [HTML Editor](#) in this manual.

- URL: URL of the manufacturer's site.
- META keywords: The keywords to be used in the keywords meta tag on the pages of this manufacturer category.
- META description: The description to be used in the description meta tag on the pages of this manufacturer category.

For more information on using the description and keywords meta tags, see the section [Using HTML Meta Tags](#) of this manual.

- OrderBy: The position of the manufacturer category relative to the other manufacturer categories in the manufacturers list.
- Availability: This option allows you to specify whether this manufacturer category must be displayed in the Customer area. Select this check box to activate the manufacturer category.

**Note for X-Cart PRO users:** The 'OrderBy' and 'Availability' settings are available only to store administrators, as only administrators can activate manufacturer categories and adjust their positions in the manufacturers list. After a new manufacturer category is created by a provider, the store administrator must specify its position number and activate it for the category to appear on the storefront. New manufacturer categories do not appear on the storefront until they are activated.

## 10.19.5 Defining International Manufacturer Descriptions

If your store supports more than one languages, you must provide names and descriptions for your manufacturer categories in all the languages supported by your store. In X-Cart, a combination of the name and description of a manufacturer category in a language other than the default store language is called the manufacturer's *international description*.

To add an international description for a manufacturer category:

1. Open the manufacturer category for which you wish to add an international description for editing.
2. In the 'Manufacturer details' dialog box, switch the language selector to the language in which you wish to add an international description. The language of the interface changes to the selected language.
3. Edit the name and description of the manufacturer category translating them into the selected language.
4. Click the **Save** button.

When you click on **Save**, the international description is added. A message is displayed confirming that the international description has been updated successfully.

To edit an international description of a manufacturer category:

1. Open the manufacturer category whose international description needs to be changed for editing.
2. In the 'Manufacturer details' dialog box, switch the language selector to the language in which you wish to add an international description. The language of the interface changes to the selected language.
3. Edit the name and/or description of the manufacturer category.
4. Click the **Save** button.

When you click on **Save**, the international description is updated. A message is displayed confirming that the international description has been updated successfully.

## 10.19.6 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.

The screenshot displays the 'Product details' form, which is divided into two main sections: 'Product thumbnail' and 'Classification'.

**Product thumbnail section:** This section includes a 'Thumbnail' label with a note '(recommended size 50x50-150x150)'. A placeholder box contains the text 'No image Available'. Below this is a 'Change image' button.

**Classification section:** This section contains several dropdown menus:

- Main category:** Set to 'Computer hardware/Memory chips'.
- Additional categories:** A list of categories including 'Books', 'Books/Internet', 'Books/Software', 'CD - DVD - Video', 'CD - DVD - Video/CD audio', 'CD - DVD - Video/DVD', 'CD - DVD - Video/Video cassettes', and 'Computer hardware'. A yellow callout box labeled 'Manufacturer drop-down box' points to the 'Manufacturer' dropdown.
- Manufacturer:** Set to 'Manufacturer is not specified'.
- Availability:** Set to 'Available for sale'.

At the bottom of the form is a 'Save' button.

3. Click the **Save** button.

The product should be assigned to the selected manufacturer category and added to this manufacturer category on the storefront.

## 10.19.7 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.

FIELD NAME	ACTIVE	DEFAULT VALUE
Manufacturers	<input checked="" type="checkbox"/>	Manufacturer is not specified ExampleBooks ExampleHousehold
Category	<input checked="" type="checkbox"/>	
Price	<input checked="" type="checkbox"/>	
Weight	<input checked="" type="checkbox"/>	

Save

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 the **Save** button.

## 10.20 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 Admin area;
- the messages appear in the 'News' section of the Customer area 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.

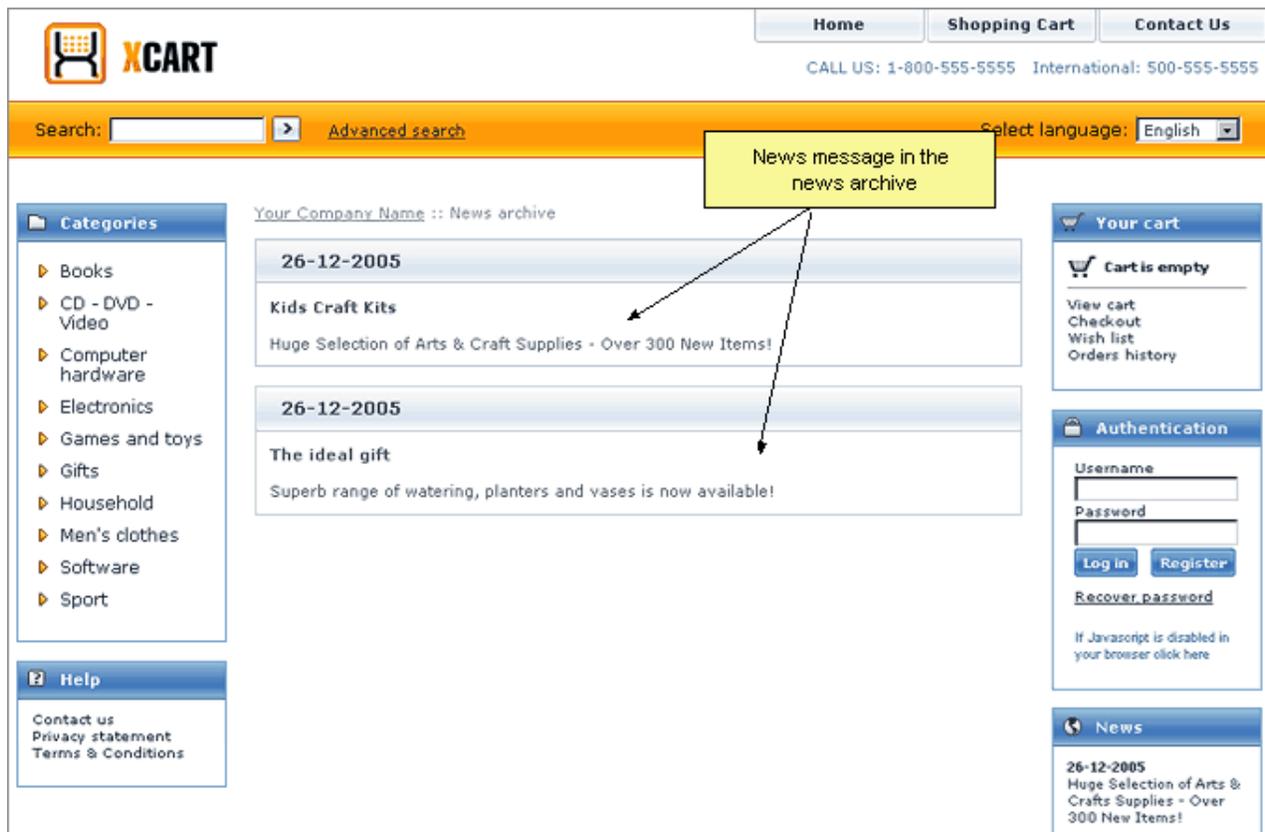
## 'News' section

The 'News' section is a place in the Customer area which can display your latest news.

The screenshot displays a typical X-Cart storefront. On the left, there is a 'Categories' sidebar with items like Books, CD - DVD - Video, Computer hardware, Electronics, Games and toys, Gifts, Household, Men's clothes, Software, and Sport. Below it is a 'Help' section with links for Contact us, Privacy statement, and 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 includes a description, market price, current price, and a 'Buy Now' button. On the right, there is a 'Your cart' section showing an empty cart, an 'Authentication' section with login and registration fields, and a 'News' section. The 'News' section is highlighted with a yellow callout box and contains a news item dated 26-12-2005 about a selection of arts and crafts supplies. A 'Subscribe' button is also visible at the bottom of the news section.

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*.

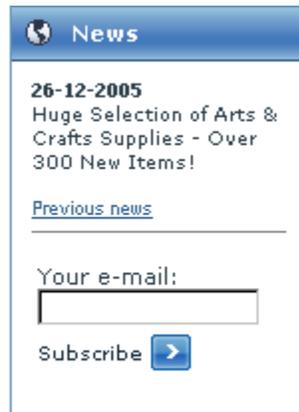
Before you post any news messages, the 'News' section says 'No news available at the moment'. After you have added one or more news messages, the message added latest of all appears in the 'News' section. The news messages posted previously are available for viewing in the news archive (accessible by 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**

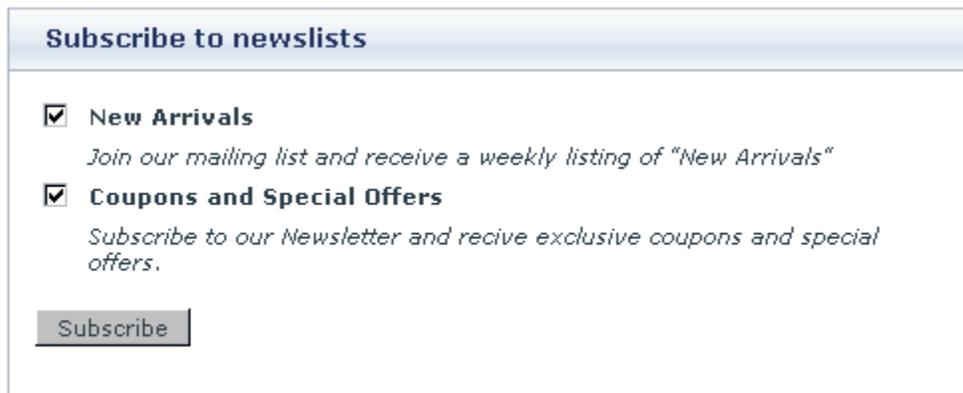
**26-12-2005**  
Huge Selection of Arts & Crafts Supplies - Over 300 New Items!

[Previous news](#)

Your e-mail:

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 recive 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:

**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"

**Submit**

**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.

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.

## 10.20.1 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	
<b>News management options</b>	
<b>General news management options</b>	
Newsletter limit to show:	<input type="text" value="30"/>
Newsletter subscribers per page:	<input type="text" value="30"/>
Send the message to N subscribers per one pass when sending newsletters:	<input type="text" value="50"/>
Interval in seconds between the passes:	<input type="text" value="0"/>
<b>Email notifications</b>	
Reply-To newsletter e-mail address:	<input type="text"/>
'Client is subscribed' notification to subscriber:	<input checked="" type="checkbox"/>
'Client is subscribed' subscribe notification to Reply-To newsletter e-mail address:	<input checked="" type="checkbox"/>
'Client is unsubscribed' notification to subscriber:	<input checked="" type="checkbox"/>
'Client is unsubscribed' notification to Reply-To newsletter e-mail address:	<input checked="" type="checkbox"/>
<input type="button" value="Save"/>	

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's 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 administrator.

c) Click the **Save** button.

## 10.20.2 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's 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:

LIST NAME	SHOW AS NEWS	ACTIVE
There are no newslists available		

Add new

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'.

**News list details**

Language: English

Short name: \*

List description: \*

Active: Yes

Available for subscription: Yes

Show messages in site news: Yes

Save

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 area.

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:** English

**Short name: \*** New Arrivals

**List description: \*** Join our mailing list and receive a weekly listing of "New Arrivals"

**Active:** Yes

**Available for subscription:** Yes

**Show messages in site news:** Yes

Save

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"/>	<b>New Arrivals</b>	<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's back end (Management menu->News management ).

**News lists**

Check all / Uncheck all Language:

	LIST NAME	SHOW AS NEWS	ACTIVE
<input type="checkbox"/>	<b>New Arrivals</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<b>Coupons and Special Offers</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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. News lists in other languages will not be displayed.
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. Also you cannot change the language of the page, while you are editing a news list.

4. If necessary, edit any of the news list details.
5. Click the **Save** button 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 the **Save** button 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 the **Delete selected** button.

The selected news lists should be removed. An information box with a confirmation message should appear.

## 10.20.3 Mailing Lists

Each of the news lists that you make available for subscription has its own *mailing list* - a list of subscriber email addresses to which messages of this news list are sent.

### Viewing a news list's mailing list

To view the contents of a mailing list, you need to open this mailing list.

To open a mailing list, do the following:

1. Find the news list whose mailing list you wish to edit and open its details for viewing/modification (Click on the news list name in the 'News Lists' dialog box).
2. Click the Subscriptions link in the 'News Management' section menu. This displays 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:

<u>E-mail</u>	<u>Since date</u>
No subscribers are found	

**Add subscriber**

E-mail:

**Import subscribers**

List of subscribers (CSV file):

After some of your customers subscribe to the news list (or after you add some email addresses to the

mailing list from the Admin area), 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	20-11-2008 09:16:40
<input type="checkbox"/>	john_doe@example.com	20-11-2008 09:16:30

---

**Add subscriber**

E-mail:

---

**Import subscribers**

List of subscribers (CSV file):

---

**Remove subscribers**

List of subscribers (CSV file):

Remove these subscribers:

(The dates in the 'Since date' column opposite the email addresses are the dates when the corresponding subscriptions were set up).

## Adding email addresses to a mailing list

Typically, email addresses will be added to mailing lists automatically as your store's visitors subscribe to your news lists. However, there may be situations in which you may need to add one or more email addresses to a mailing list by yourself. There are two methods that you can use to add email addresses to a mailing list: add email addresses manually one at a time or importing them from a file. Adding email addresses manually is a convenient method when you need to add just a few addresses; importing from a file is good when a large number of email addresses needs to be added (for example, when you move your subscribers' data to a new store or when you set up a mailing list for a new news list using an already existing mailing list).

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 subscriber' subsection of the 'News list mailing list' dialog box.
3. Click the **Add** button.

When you click on **Add**, the email address is 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 must 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 'List of subscribers (CSV file)' field in the 'Import 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 'List of subscribers (CSV file)' field, click the **Import** button.

When you click on **Import**, the email addresses contained in your import file are added to the mailing list.

## Managing email addresses contained in a mailing list

You can remove email addresses from mailing lists to unsubscribe owners of these email addresses from the newsletter. Email addresses can be removed from a mailing list manually or by importing.

To remove one or more email addresses from a mailing list manually:

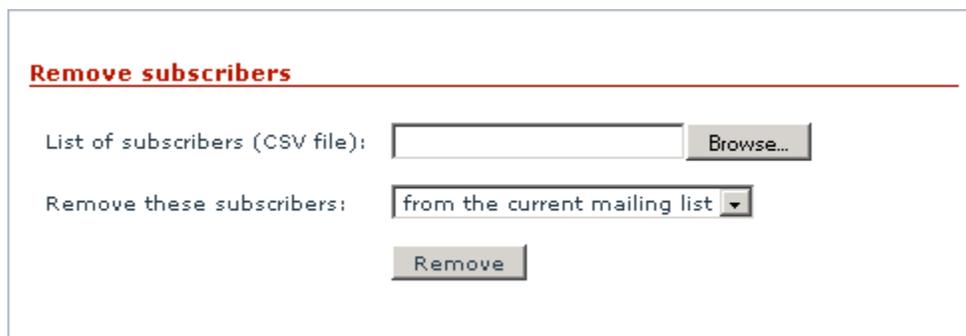
1. Open the mailing list from which you wish to remove email addresses.
2. Select the check boxes next to the email addresses that need to be removed.

3. Click the **Delete selected** button.

When you click on **Delete selected**, the selected email addresses are removed.

To remove email addresses from a mailing list by importing a CSV file:

1. Prepare a CSV file with a list of email addresses that need to be removed from a mailing list.
2. Open the mailing list from which you wish to remove the email addresses contained in the CSV file.
3. Use the 'Remove subscribers' section of the 'News list mailing list' dialog box to import the file and remove the email addresses:



**Remove subscribers**

List of subscribers (CSV file):

Remove these subscribers:

- a) Use the **Browse** button next to the 'List of subscribers (CSV file)' field to locate and select the CSV file that needs to be imported.
- b) Use the 'Remove these subscribers' selectbox to specify whether you want the addresses from the CSV file to be removed only from the current mailing list or from all the mailing lists in the store.
- c) Click the **Remove** button.

When you click on **Remove**, the addresses contained in the CSV file are removed (depending on the selected option - from the current mailing list or from all the mailing lists).

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 to add email addresses to some other mailing list).

To export specific e-mail addresses from a mailing list:

1. Open the mailing list from which you wish to export email addresses.
2. Select the addresses you wish to export by selecting the respective check boxes.
3. Click the **Export selected** button.
4. When prompted, save the export file.

To export all the email addresses from a mailing list:

1. Open the mailing list from which you wish to export email addresses.
2. Click the **Export all** button.
3. When prompted, save the export file.

## 10.20.4 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.
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 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.

4. 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:**

5. 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:

News list messages				
Check all / Uncheck all				
	SUBJECT	CREATED	STATUS	SEND MESSAGE
<input type="checkbox"/>	The ideal gift	26-12-2005 14:23:07	Queued	<input type="button" value="Send"/>
<input type="button" value="Delete selected"/>				
<input type="button" value="Add new"/>				

## 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:

News list messages				
Check all / Uncheck all				
	SUBJECT	CREATED	STATUS	SEND MESSAGE
<input type="checkbox"/>	The ideal gift	26-12-2005 14:23:07	Queued	<input type="button" value="Send"/>
<input type="checkbox"/>	Kids Craft Kits	26-12-2005 14:48:08	Queued	<input type="button" value="Send"/>
<input type="button" value="Delete selected"/>				
<input type="button" value="Add new"/>				

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 the **Save** button. 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 the **Resend** button.

## 10.21 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 area):



The image shows a screenshot of a form field labeled 'Tracking number:'. The label is positioned above a rectangular input box. The input box is currently empty and has a thin border.

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:

A rectangular button with a light gray background and a thin black border. The text "Track It!" is centered on the button in a dark gray font.

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 Admin area (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.

## 10.22 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](#)).

## 10.22.1 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. It has a title bar 'General settings' and a sub-section 'Product Options'. There are two settings, each with a checkbox:

Redirect a customer who clicks the "Buy Now" or "Add to wish list" buttons of a product with product options to product details page	<input type="checkbox"/>
The dynamic updating of the Save Money label depending on the selected product options is enabled	<input checked="" type="checkbox"/>

At the bottom left, there is a 'Save' button.

- **Redirect a customer who clicks the "Buy Now" or "Add to wish list" buttons of a product with product options to product details page:** Select this check box in order for a customer using the

"Buy now" or "Add to wish list" buttons to order or add to wish list a product with product options to be redirected to the 'Product details' page. 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.)

- **The dynamic updating of the Save Money label depending on the selected product options is enabled:** select this check box to dynamically update the Save Money label on the 'Product details' page depending on the product options selected by a customer. 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 the **Save** button.

## 10.22.2 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 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 and on the shopping cart page, when products with product options are added to cart.
- Option text - Description of the option group that will appear on the 'Product details' page of the

Customer area 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 area and enables your customers to select option values from this group. Unselecting the check box hides the option group field from the Customer area).
- Options 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 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 area 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 area and enables your customers to select option values from this group. Unselecting the check box hides the option group field from the Customer area).

- Options 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 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 area 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 area and enables your customers to enter text into it. Unselecting the check box hides the custom text field from the Customer area).
- Options list - *the field is inactive, as custom text fields are not supposed to provide options to select from.*

### Add 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

<input type="checkbox"/>	#	OPTION CLASS	OPTION TYPE	ORDERBY	AVAILABILITY	OPTIONS LIST
<input type="checkbox"/>	445	Color	Product variant	<input type="text" value="1"/>	<input checked="" type="checkbox"/>	White Blue
<input type="checkbox"/>	446	Size	Product variant	<input type="text" value="2"/>	<input checked="" type="checkbox"/>	S M L XL
<input type="checkbox"/>	444	T-shirt back message	Custom text field	<input type="text" value="3"/>	<input checked="" type="checkbox"/>	Options list is empty.
<input type="checkbox"/>	447	Gift wrap	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 area).

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 area. Unselecting the check box hides the option group field from the Customer area, but leaves it available for editing in the store's 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 area) 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.

## 10.22.3 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':

**Product option exceptions**

Product option exceptions allow you to define option combinations that are not available.

OPTIONS COMBINATION
Exception list is empty

**Add exception**

Color: [select one] ▼

Size: [select one] ▼

Add exception

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

Delete selected

**Add exception**

Color: [select one] ▼

Size: [select one] ▼

Add exception

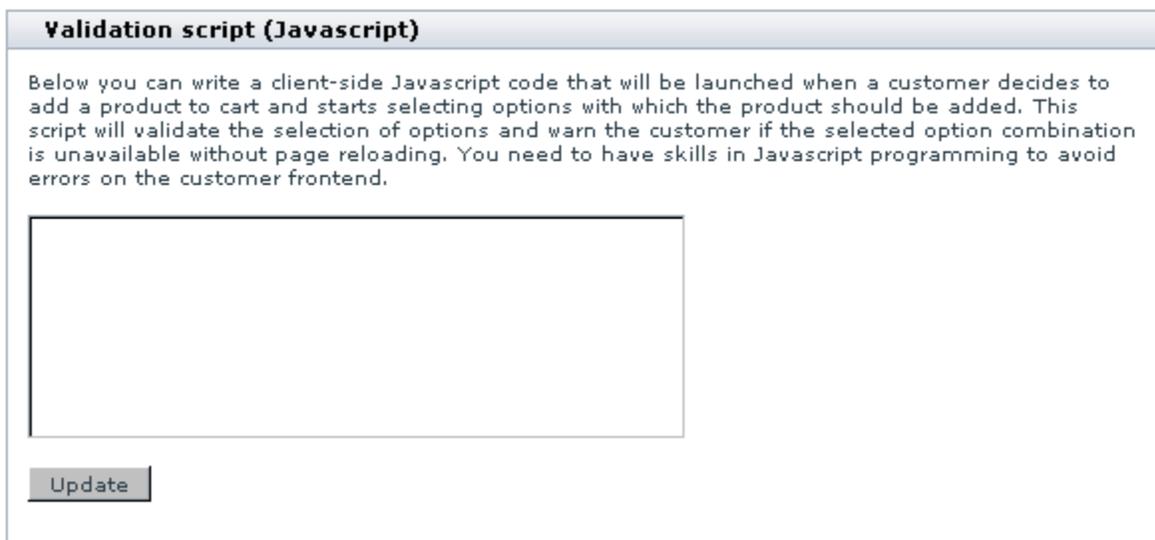
### Deleting product option exceptions

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 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'.

## 10.22.4 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:**

[+ Modify wholesale prices for selected variants](#)

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"](#).

## 10.23 QuickBooks

### What QuickBooks module does

This module enables you to export orders in IIF (QuickBooks 2002, 2003) format.

---

## 10.23.1 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:

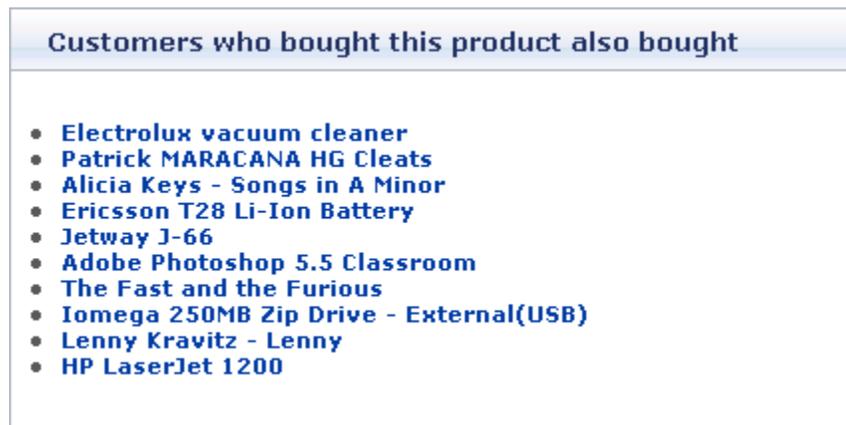
General settings	
<b>QuickBooks</b>	
Transactions class name.:	<input type="text" value="Website:Retail"/>
The name of the income account you use to track taxes. The type of this account should be INC.:	<input type="text" value="Website:Tax"/>
The name of the income account you use to track product sales. 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 Discour"/>
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 income account you use to track payment surcharge. The type of this account should be INC.:	<input type="text" value="Sales:Payment Surcharge"/>
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"/>
<input type="button" value="Save"/>	

3. Click the **Save** button.

## 10.24 Recommended Products

### What Recommended Products module does

Recommended Products is a module that allows you to promote products by telling your store's visitors what other visitors bought with the product they are viewing. When this module is enabled, some or all of the Product details pages in your store display a section titled 'Customers who bought this product also bought':



By default, the contents of this section is generated randomly; however, the module can be adjusted to generate the contents of this section based on the actual statistics.

### Roles in Recommended Products 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 'Recommended Products'](#)).

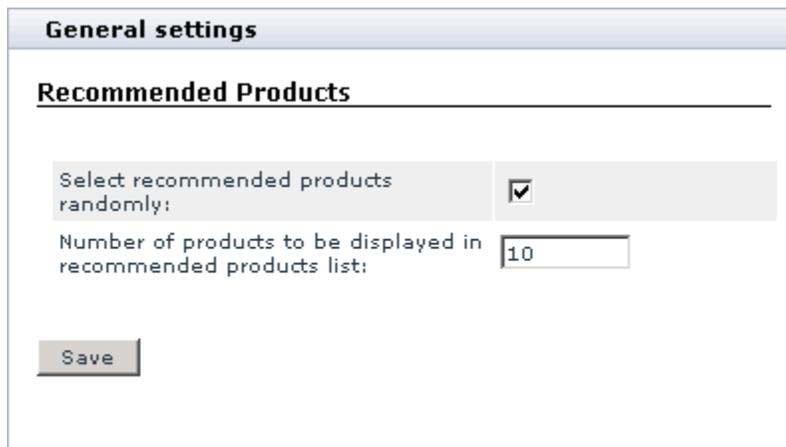
### 10.24.1 Enabling and Configuring 'Recommended Products'

To begin using the module:

1. Enable Recommended products module (Administration menu->Modules).

When the module is enabled, you can see Recommended products section in General settings/Modules options.

2. Adjust the module settings via General settings/Modules options->Recommended products:



**General settings**

**Recommended Products**

Select recommended products randomly:

Number of products to be displayed in recommended products list:

**Save**

a) Adjust the check box 'Select recommended products randomly':

If you select this check box, the contents of the section 'Customers who bought this product also bought' will be generated randomly. This means that the list of products in this section will be formed of random product names, no matter whether the products included into this list have actually been bought with the product.

If you unselect this check box, the list of products in the section 'Customers who bought this product also bought' will be formed of the products that have actually been purchased with the product. If the product has never been purchased, or has always been purchased alone, the section 'Customers who bought this product also bought' will not be displayed.

b) Use the 'Number of products to be displayed in recommended products list' field to specify the maximum number of product items that you wish to be displayed in the section 'Customers who bought this product also bought'.

c) Click the **Save** button.

## 10.25 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 administrators and providers 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](#)).

## 10.25.1 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

[USPS shipping labels help](#) 

#### U.S.P.S. options

U.S.P.S. UserID:	<input type="text" value="Sample_UserID"/>
U.S.P.S. shipping label image type:	<input type="text" value="TIFF"/>
U.S.P.S. sample mode:	<input type="text" value="Yes"/>
U.S.P.S. package sender first name:	<input type="text"/>
U.S.P.S. package sender last name:	<input type="text"/>

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 the **Save** button.

## 10.25.2 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's 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**

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"/>	#1040	customer	01-02-2007	DHL/Airborne Express 10:30 AM	Download
<input type="checkbox"/>	#1042	j_doe	01-02-2007	USPS Express Mail	Download
<input type="checkbox"/>	#1043	j_doe	01-02-2007	UPS Ground	Download
<input type="checkbox"/>	#1044	cust	07-02-2007	UPS Ground	Download

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, USPS or DHL/Airborne.

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.

## 10.26 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 areas of your store are combined into one interface. The module works in such a way that any administrator accounts existing in the store are disabled, while all provider accounts get administrator privileges. As a result, you no longer have separate administrator and provider accounts: when Simple mode is enabled, the Management and Administration menus, typically available just in the Admin area, appear in the Provider area 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 administrator and provider settings in one interface;

*or*

- when, before a store goes live, one person wants to configure it both for administrator and provider without having to switch endlessly between the Admin and Provider areas.

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 areas; 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 Admin area (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 Admin area.

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 Admin area (Administration menu->Modules).

## 10.27 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'](#)).

## 10.27.1 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**

---

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 the **Save** button.

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.

## 10.28 Stop List

### What **Stop List** module does

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.

### Roles in **Stop List** 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 'Stop List'](#)).
- You can add IP addresses to your store's Stop list and remove IP addresses from the Stop list (See [Using the Stop List](#)).
- 

### 10.28.1 Enabling and Configuring 'Stop List'

To begin using the module:

1. Enable Stop List module (Administration menu->Modules).
2. Adjust the module settings via General settings/Modules options->Stop List options:

General settings	
<b>Stop List</b>	
Check if the current set of products in the cart coincides with the product set from an order originating from a blocked IP:	<input 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"/>
<input type="button" value="Save"/>	

- Check if the current set of products in the cart coincides with the product set from an order originating from a blocked IP: if this option is enabled, and the set of products in the cart does coincide with a set of products of an order originating from a blocked IP, a message "You are not allowed to continue the checkout procedure! Please apply to the store administrator for details." will be displayed to the customer.
- Maximum transaction from one unique IP address (per day): enter the daily number of allowed transactions from one IP address.
- 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: enter a number, denoting, how many transactions from the same IP address can be failed before the IP address is placed into the Stop list.
- Failed transaction limit in one session, there is IP address placed in the Stop list: enter a

number, denoting, how many transactions from the same IP address can be failed during one session before the IP address is placed into the Stop list.

- 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: enter a number, denoting, how many transactions from the same IP address can be made quicker than the minimum time allowed for order placement.
- Minimum time of order placement ensuring that the order was placed by a person, not by a script (seconds): enter a number, denoting how much time it should take to place the order, for this order to be considered to be placed by a person.
- Fail checkout process, if customer proxy is anonymous: select this option to block customers using anonymous proxy servers automatically.

## 10.28.2 Using the Stop List

To access the 'Stop list' section, click on Stop list in the Management menu.

Before you add any IP addresses to the Stop list, it is empty.

Stop list			
Check all / Uncheck all			
IP	REASON	STATUS	DATE
Stop list is empty.			

To add an IP address to the Stop list, do the following:

1. Click on 'Add IP address' in the 'Stop list' section menu. A dialog box titled 'Add IP address' opens:

Add IP address	
<b>Note:</b> Each IP octet is a numerical value from 0 to 255. The first octet must not be equal to 0. To set an IP address mask use the '*' symbol.	
IP:	<input type="text" value="0"/> . <input type="text" value="0"/> . <input type="text" value="0"/> . <input type="text" value="0"/>
Status:	<input type="text" value="Blocked"/> ▼
<input type="button" value="Add"/>	

2. Enter the IP address into the provided form.
3. Click the **Add** button.

When you click on **Add**, the IP address is added to the Stop list:

Stop list				
Check all / Uncheck all				
	△ IP	REASON	STATUS	DATE
<input type="checkbox"/>	111.111.111.111	Added by administrator	Blocked	06-08-2004 09:53:18
Delete selected				

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 remove one or more IP addresses from the Stop list, do the following:

1. In the Stop list, select the check boxes next to the IP addresses that need to be removed. You can select or unselect all the check boxes by clicking on the Check all / Uncheck all links.
2. Click the **Delete selected** button.

When you click on **Delete selected**, the selected IP addresses are removed from the list.

If Antifraud module is activated, DETAILS column appears in the 'Stop list':

Stop list					
Check all / Uncheck all					
	△ IP	REASON	STATUS	DATE	DETAILS
<input type="checkbox"/>	111.111.111.111	Added by administrator	Blocked	06-08-2004 09:53:18	>>
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 - Windows Internet Explorer

Antifraud service

**Lookup address**

IP:  City: \*

Proxy IP:  State: \*

Country: \*

Zip/Postal code: \*

The fields marked with \* are mandatory.

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.

X-CART. Powerful PHP shopping cart software - Windows Internet Explorer

Antifraud service

Lookup address

IP:	<input type="text" value="111.111.111.111"/>	City:	* <input type="text" value="Test city"/>
Proxy IP:	<input type="text"/>	State:	* <input type="text" value="CA"/>
City	La Verne	Country:	* <input type="text" value="US"/>
State	CA	Zip/Postal code:	* <input type="text" value="50001"/>
Country	US		
Zip/Postal code	Unknown		

The fields marked with \* are mandatory.

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).

**Lookup address**

IP:	<input type="text" value="111.111.111.111"/>	City:	* <input type="text" value="Test city"/>
Proxy IP:	<input type="text"/>	State:	* <input type="text" value="CA"/>
City:	La Verne	Country:	* <input type="text" value="US"/>
State:	CA	Zip/Postal code:	* <input type="text" value="50001"/>
Country:	US		
Zip/Postal code:	Unknown		

Distance: 2340 km

The fields marked with \* are mandatory.

## 10.29 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](#)).

### 10.29.1 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 a web interface for configuring the Subscriptions module. It is titled 'General settings' and 'Subscriptions'. There are three main fields: a text input for a secret key, a checkbox for recurring billing notifications (which is checked), and 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 the **Save** button.

To be able to process subscription payments automatically you need to set up Subscriptions processor. See the ['Payment methods'](#) section for more information.

## 10.29.2 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			
<input type="text"/> days			
<input type="button" value="Apply"/>			

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:*

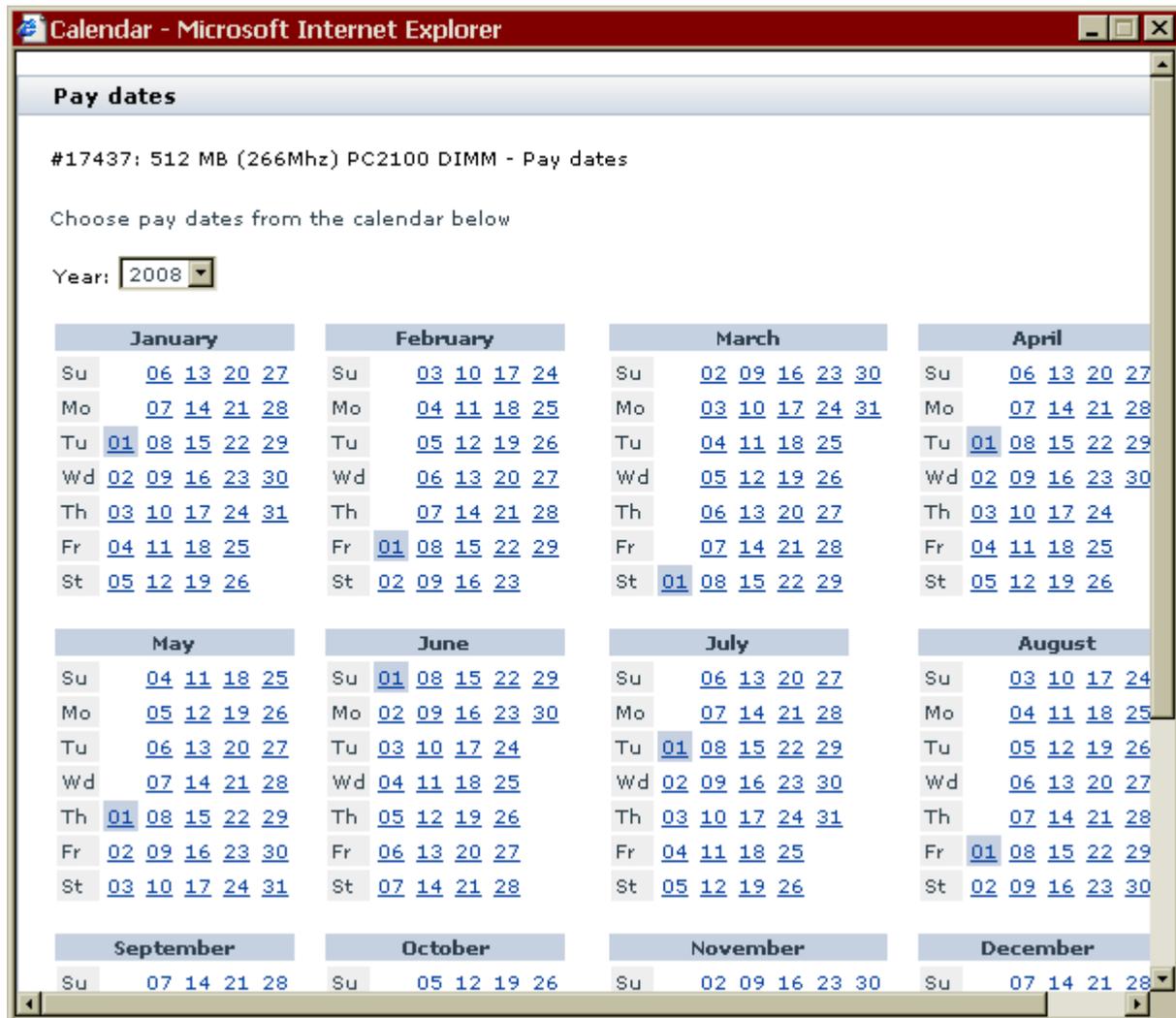
You would like to set up a recurring billing plan for a certain product so that regular payments of \$20 are taken from the accounts of customers who purchase this product monthly (say, on the 10th day of the month). You set the 'PAY PERIOD' field to Monthly and the 'PERIOD FEE' field to 20.00. Assuming 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			
<input type="button" value="Apply"/>			

4. Click the **Apply** button. Pay dates button will appear.
5. Click the **Pay dates** button. Use the calendar to select the dates on which payments will need 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 the **Update** button.

### 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 the **Delete** button at the bottom of the 'Subscription' dialog box. The dialog box fields should be cleared.

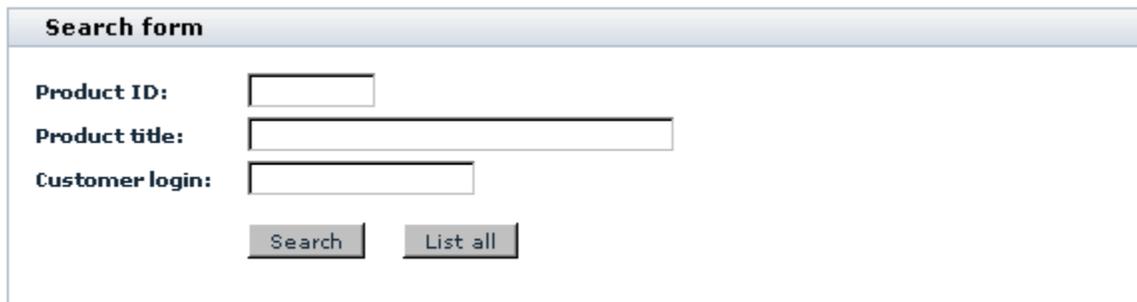
### 10.29.3 Managing Subscriptions

Existing subscriptions can be managed through the 'Subscriptions Management' section of the store's Admin area. 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 image shows a web form titled "Search form" with a light blue header. 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" and "List all".

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 the **Search** button.

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			
<b>Table Format:</b>			
<Product> (<Next Pay Date>): <Subscribers>			
<Login> <Date of Subscription> (<Subscription Order Status>) <Last Paid Date> (<Last Paid Order Status>)			
<b>Note:</b> Order status codes: <b>Q</b> - Queued, <b>P</b> - Processed, <b>B</b> - Backordered, <b>D</b> - Declined, <b>F</b> - Failed, <b>C</b> - Complete.			
CUSTOMER	SUBSCRIPTION DATE	LAST PAID DATE	STATUS
<b>Lamp</b> (06-18-2004): 1 subscriber(s)			
customer	06-16-2004 (Q)	06-16-2004 (Q)	Active <input type="button" value="Charge"/>

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.

## 10.29.4 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 Admin area:
  - 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=
```

or

```
/usr/bin/fetch -o- http://www.mystore.com/admin/pay_subscriptions.php?key=se
```

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.

## 10.30 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'](#)).

### 10.30.1 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 Admin area 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 UTA02012008  
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 its attached  
Exhibit A (Definitions - General Terms and  
Conditions )); (2) the End User Rights  
(including its attached Exhibit A (Definitions  
available here. The Agreement may be presented  
to You more than once in conjunction with Your

Yes, I Do Agree  
 No, I Do Not Agree

**Print**      **Next**      **Cancel**

UPS, the UPS Shield trademark, the UPS Ready mark, the UPS OnLine Tools mark and the  
Color Brown are trademarks of United Parcel Service of America, Inc. All Rights Reserved.

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.

---

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Make sure you have completed all the fields and entered your valid e-mail address before you click the **Next** button.

Step 4 informs you of the successful completion of the registration process:

**UPS OnLine® Tools Licensing & Registration Wizard - Registration Successful - Step 4**



**Registration Successful!**

Thank you for registering to use the UPS OnLine® Tools.

To learn more about the UPS OnLine® Tools, please visit [www.ups.com](http://www.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 the **Finish** button 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:\***   
Click here for help  
Occasional  
Suggested Retail Rates

**Destination type:\***  Residential address  Commercial address

**Packaging type:**

**Package limits**

The settings "Maximum package weight" and "Maximum package dimensions" define the maximum weight and size of the shipping package that you do not wish to be exceeded when products are shipped to customers. If the total weight and/or volume of the

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.

## 10.31 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 screenshot displays a product page layout. On the left, there is a 'Categories' sidebar with a tree view including Books, CD - DVD - Video, Computer hardware, Electronics, Games and toys, Gifts, Household, Men's clothes, Software, and Sport. Below it is a 'Help' section with links for Contact us, Privacy statement, and Disclaimer. The main content area is titled 'Your Company Name :: Books :: Your product'. It features a 'Your product' section with a placeholder for an image (No image Available), a 'Product description' section, and a 'Details' section containing SKU (SKU16133), Quantity in stock (10 item(s) available), and Price (\$79.00 (€ 68.73)). Below this is an 'Options' section with a quantity dropdown set to 1 and an 'Add to cart' button. To the right of the main content is a 'Your cart' section showing 'Cart is empty' and links for View cart, Checkout, and Orders history. Below the cart is an 'Authentication' section with fields for Username and Password, Log in and Register buttons, and a Recover password link. At the bottom of the main content area is a 'Send to friend' form with fields for 'Your name', 'Your e-mail', and 'Recipient's e-mail', and a 'Send to friend' button. Finally, a 'Related products' section lists two items: '#65 New Masters of Flash' and '#67 Designing Web Usability'.

**Note:** The section 'Related products' is displayed only if there is at least one related product.

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](#)).

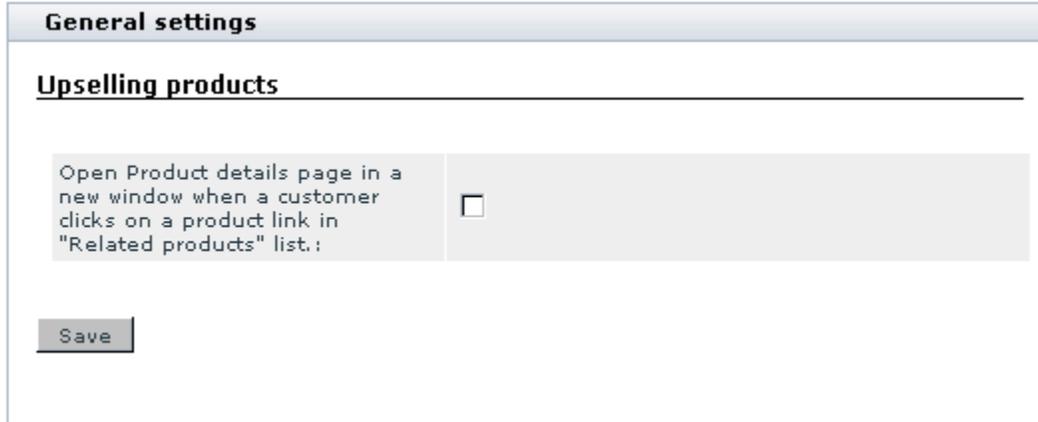
## 10.31.1 Enabling and Configuring 'Upselling Products'

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:



**General settings**

**Upselling products**

Open Product details page in a new window when a customer clicks on a product link in "Related products" list.:

Save

- 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.

## 10.31.2 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.

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.

- 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:

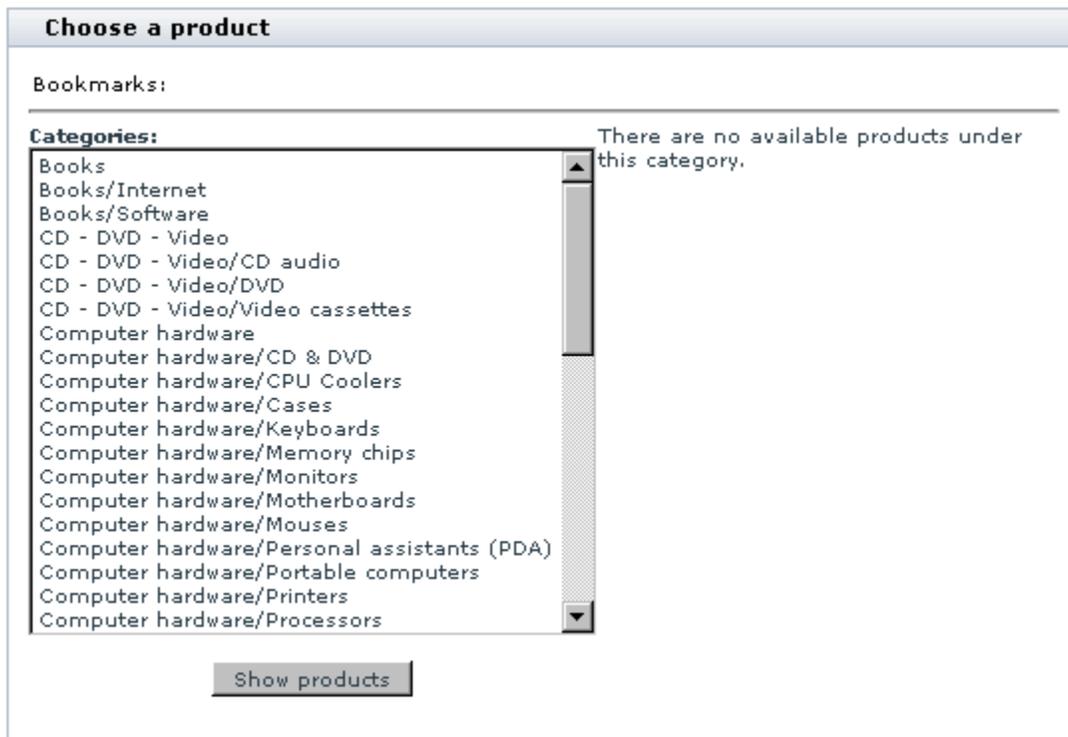
Bidirectional link

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:

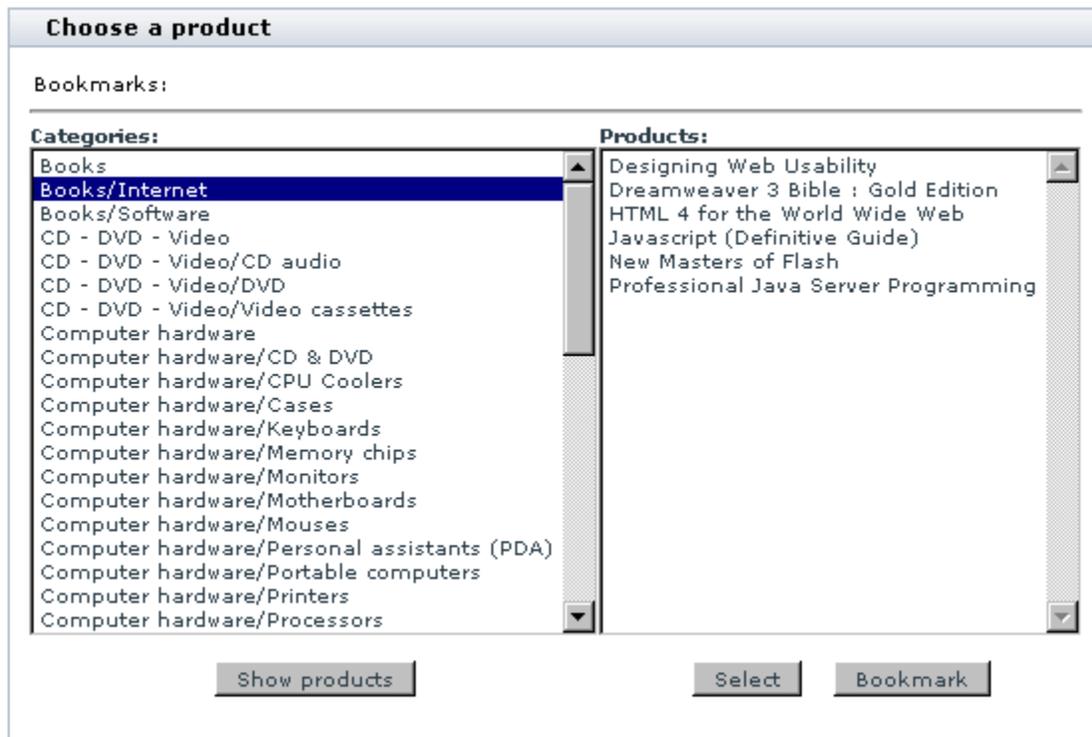
1. Click the **Browse** button next to the 'Product' field. A new window opens displaying a dialog box titled 'Choose a product':



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.

### 10.31.3 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.

## 10.32 Users Online

### What Users Online module does

The module Users online enables 'Users online statistics' subsection in the 'Statistics' section of your store's Admin area (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		
John Smith	21/07/2004 11:03:30	21/07/2004 11:03:30	/eshop/cart.php	<b>Javascript (Definitive Guide):</b> 1 × \$39.50 = \$39.50 Cover: Soft
Jane Doe	21/07/2004 11:31:40	21/07/2004 11:32:51	/eshop/cart.php?mode=wishlist	<b>Javascript (Definitive Guide):</b> 1 × \$39.50 = \$39.50 Cover: Soft  <b>Designing Web Usability:</b> 1 × \$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.

## 10.33 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](#)).

### 10.33.1 Setting Wholesale Prices

You can define wholesale pricing for the product. The product will be sold at 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 the **Add/Update** button. 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**

---

Wholesale ▾

**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 on **Add/Update**.

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 Admin area 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 the **Delete selected** button.

## 10.33.2 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="text" value="100"/>	<input type="text" value="11.99"/>	<input type="text" value="Wholesale"/>	+ -

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 the **Update wholesale prices** button. The new wholesale price will be added to the prices list.

**Note:** When both wholesale prices and product options are defined for a product, the price is dynamically changed on the product details page when a customer selects another product option or changes the desired quantity. If product options are not defined, the wholesale prices are not automatically calculated.

## 10.34 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 shows an e-commerce interface with a search bar at the top, a language selector, and a navigation menu on the left. The main content area displays two products under the 'Sport' category. The first product is 'PATRICK Maracana HG Cleats' (SKU: C98715v) with a market price of \$47.67 and a current price of \$41.95. The second product is 'Brine ATTACK Soccer Ball' (SKU: SOCBALL01) with a market price of \$15.06 and a current price of \$12.95. Both products have 'Buy Now' and 'Add to wish list' buttons. A yellow callout box highlights the 'Add to wish list' button for the cleats, explaining its function. The right sidebar contains a 'Your cart' section (showing an empty cart) and an 'Authentication' section (showing a logged-in customer).

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** [>](#)

**\$34.99** x  = **\$34.99**    **Update** [>](#)

**Details** [>](#)    **Add to cart** [>](#)    **Delete item** [>](#)

---



**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** [>](#)    **Add to cart** [>](#)    **Delete item** [>](#)

---

**Send entire wish list by e-mail:**  [>](#)

**Clear wish list** [>](#)

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.

## 10.34.1 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**

Show the 'Add to wish list' 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 wish list):

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.

## 10.34.2 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 areas.

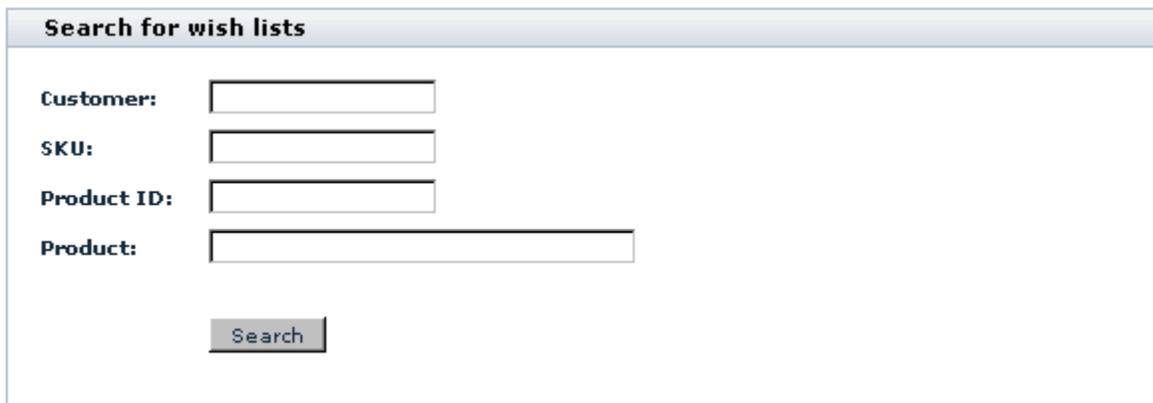
To access the 'Search for wish lists' section:

- (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". It contains four input fields stacked vertically, each with a label to its left: "Customer:", "SKU:", "Product ID:", and "Product:". Below these fields is a rectangular button labeled "Search".

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.

Search results	
<a href="#">Search again</a> 	
CUSTOMER	ITEMS
John Doe (customer)	2 item(s) in wish list

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:

Wish list			
<a href="#">Search again</a> 			
<b>Customer:</b> John Doe (customer)			
SKU	PRODUCT	SELECTED OPTIONS	QUANTITY
SKU93	Lord of the Rings Board Game	Gift pack: No	2
C98715	PATRICK Maracana HG Cleats	Size: XS Color: Brown	1



# 11 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](#)
- [eSelect plus](#)
- [CyberSource](#)
- [Sage Pay](#)

## 11.1 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 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](#)'.

### 11.1.1 X-Cart's PayPal Integration Overview

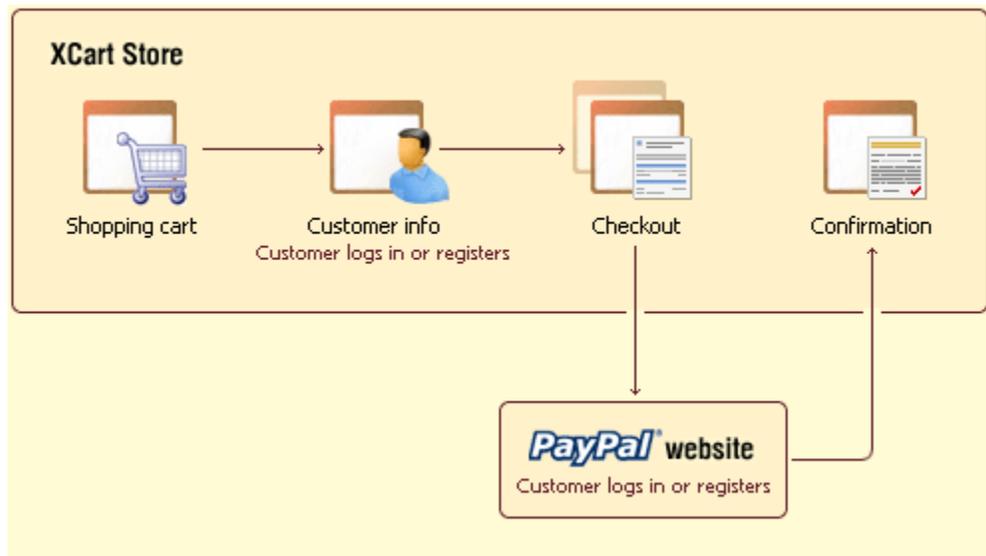
X-Cart supports the following PayPal solutions:

- 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

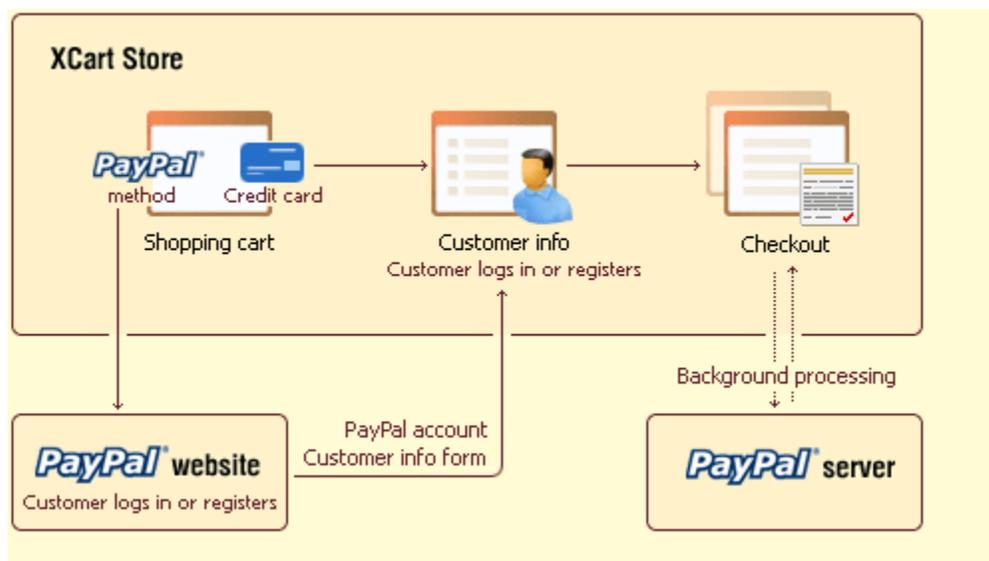
Website Payments Pro is a PayPal solution currently available only to US merchants. It is an advanced solution composed of two payment capabilities: credit card processing with Direct Payment and PayPal payment processing with Express Checkout.

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.

### 11.1.2 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](#)'.

### 11.1.2.1. 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:  
[https://www.paypal.com/cgi-bin/webscr?cmd=\\_registration-run](https://www.paypal.com/cgi-bin/webscr?cmd=_registration-run) for the US website.  
[https://www.paypal.com/uk/cgi-bin/webscr?cmd=\\_registration-run](https://www.paypal.com/uk/cgi-bin/webscr?cmd=_registration-run) 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 [http://www.paypal.com/cgi-bin/webscr?cmd=\\_merchant-outside](http://www.paypal.com/cgi-bin/webscr?cmd=_merchant-outside) ,  
(UK merchants): Point your browser to [https://www.paypal.com/uk/cgi-bin/webscr?cmd=\\_merchant-outside](https://www.paypal.com/uk/cgi-bin/webscr?cmd=_merchant-outside) .

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.

### 11.1.2.2. 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 Direct Payment API unless you get approved and accept the Pro billing agreement.

### 11.1.2.3. 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'.

To view your credentials at any time later, follow these steps.

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/`.

#### 11.1.2.4. 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"/>	Credit Card Extra charge: <input type="text" value="0.00"/> \$ <input type="checkbox"/> Cash on delivery method	Visa, <u>Mastercard</u> , American Express	HTTP	All Premium Wholesale	0
<input checked="" type="checkbox"/>	Check Extra charge: <input type="text" value="0.00"/> \$ <input type="checkbox"/> Cash on delivery method	Check payment	HTTP	All Premium Wholesale	0
<input checked="" type="checkbox"/>	Gift Certificate		HTTP	All Premium Wholesale	15
<input type="checkbox"/>	PayPal Extra charge: <input type="text" value="0.00"/> \$		HTTP	All Premium Wholesale	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](#)').

### 11.1.2.5. 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:

---

Order prefix:

Action to be performed on order placement:

Test/Live mode:   
Note: to use test mode you need to get an additional account at PayPal Sandbox

---

**Suppress special characters in the data sent to PayPal**  
Note: PayPal does not support some character sets. This option replaces all language-specific characters with a "?" symbol in the order data before sending it to PayPal (applies only to Website Payments Standard). Please, make sure your shop encoding is supported by PayPal before disabling this option.

2. Adjust the fields in the lower part of the dialog box as follows:

- **Account:** The e-mail address you use to access your PayPal Business account.
- **Payment for:** 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:** The currency to be used for PayPal payment transactions.
- **Order prefix:** 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.
- **Action to be performed on order placement:** The mode in which you wish payment transactions to be performed via PayPal on order placement (*Auth only* or *Auth and Capture*).
- **Test/Live mode:** 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 >>](#)

---

**Note:**

API access username:

API access password:

Test/Live mode:

Note: to use test mode you need to get an additional account at PayPal Sandbox

Action to be performed on order placement:

Order prefix:

---

**Suppress special characters in the data sent to PayPal**  
Note: PayPal does not support some character sets. This option replaces all language-specific characters with a "?" symbol in the order data before sending it to PayPal (applies only to Website Payments Standard). Please, make sure your shop encoding is supported by PayPal before disabling this option.

2. Adjust the fields in the lower part of the dialog box as follows:

- API Access username and API Access password: Your API Username and API Password as provided by your PayPal account.
- Use PayPal authentication method: The authentication method that you would like to use (API Signature or API Certificate).
- API certificate filename: The location of your API certificate file (Only needs to be completed if you selected API Certificate as your PayPal authentication method).
- API signature: Your API Signature (Only needs to be completed if you selected API Signature as your PayPal authentication method).
- Currency: The currency to be used for PayPal payment transactions.
- Test/Live mode: 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](#)).
- Action to be performed on order placement: The mode in which you wish payment transactions to be performed via PayPal on order placement (*Auth only* or *Auth and Capture*).
- Order prefix: The 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:

Partner:

Test/Live mode:  Note: to use test mode you need to get an additional account at PayPal Sandbox

Action to be performed on order placement:

Order prefix:

---

**Suppress special characters in the data sent to PayPal**  
Note: PayPal does not support some character sets. This option replaces all language-specific characters with a "?" symbol in the order data before sending it to PayPal (applies only to Website Payments Standard). Please, make sure your shop encoding is supported by PayPal before disabling this option.

2. Adjust the fields in the lower part of the dialog box as follows:

- Vendor: The vendor name (login ID).
- Partner: The partner name.
- User: Your user name, if used.
- Password: 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: The currency to be used for PayPal payment transactions.
- Test/Live mode: 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](#)).
- Action to be performed on order placement: The mode in which you wish payment transactions to be performed via PayPal on order placement (*Auth only* or *Auth and Capture*).
- Order prefix: The 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: English

Check all / Uncheck all

	METHODS	SPECIAL INSTRUCTIONS	PROTOCOL	MEMBERSHIP	POS.
<input type="checkbox"/>	Credit Card Extra charge: 0.00 \$ <input type="checkbox"/> Cash on delivery method	Visa, Mastercard, American Express	HTTPS	All Premium Wholesale	0
<input type="checkbox"/>	Check Extra charge: 0.00 \$ <input type="checkbox"/> Cash on delivery method	Check payment	HTTP	All Premium Wholesale	0
<input type="checkbox"/>	Gift Certificate		HTTP	All Premium Wholesale	15
<input type="checkbox"/>	PayPal Pro: Express Checkout Extra charge: 0.00 \$		HTTP	All Premium Wholesale	999
Payment systems <b>PayPal Pro</b> : <a href="#">Configure</a>   <a href="#">Delete</a>					
<input checked="" type="checkbox"/>	PayPal Pro: DirectPayment Extra charge: 0.00 \$		HTTP	All Premium Wholesale	999
Payment system <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 >>](#)

---

**Note:**

API access username:

API access password:

---

Test/Live mode:  Note: to use test mode you need to get an additional account at PayPal Sandbox

Action to be performed on order placement:

Order prefix:

---

**Suppress special characters in the data sent to PayPal**  
Note: PayPal does not support some character sets. This option replaces all language-specific characters with a "?" symbol in the order data before sending it to PayPal (applies only to Website Payments Standard). Please, make sure your shop encoding is supported by PayPal before disabling this option.

2. Adjust the fields in the lower part of the dialog box the same way as for [Website Payments Pro](#).

### 11.1.2.6. 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.

### 11.1.2.7. 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.

## 11.1.3 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](#)'.

### 11.1.3.1. 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.

### 11.1.3.2. 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 your store's Admin area.

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:**

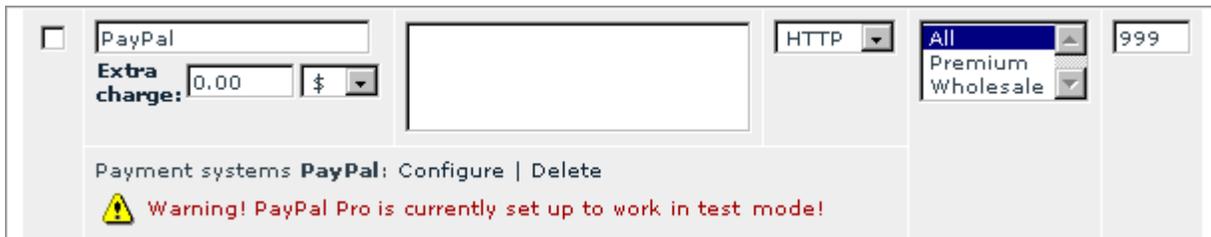
1. Log in to your Sandbox Business account to obtain API credentials for the test mode (The Sandbox Business account backoffice is organized similarly to the backoffice of your production PayPal Business account, so API credentials for the test mode can be obtained the same way as described in the section '[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 your store's Admin area.
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 your store's Admin area.
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:



Payment systems **PayPal**: [Configure](#) | [Delete](#)

**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.

### 11.1.3.3. 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 required 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.

## 11.1.4 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.

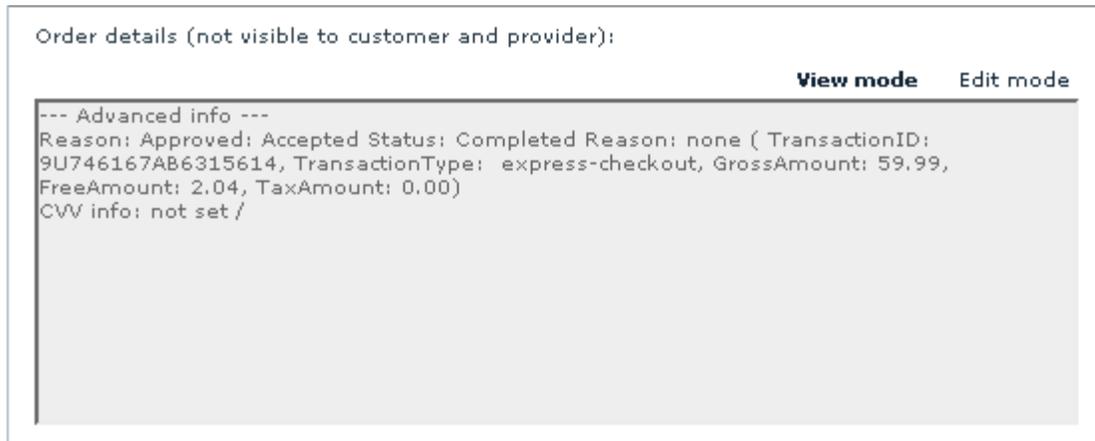
Detailed information is available on the 'Order details' page. Information about the payment transaction(s) pertaining to the order appears on the 'Order details' page as follows:

- '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).



- '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 and to refund 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 e-mail: xcart\_paypal@example.com  
 Receiver ID: XPFKZPRQR79U6  
 Amount: 59.99  
 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 can see in the 'STATUS' boxes of PayPal orders are *Not finished*, *Queued*, *Pre-Authorized*, *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 using 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; in this case, PayPal temporarily sets the status of the order to 'Pending'. In X-Cart, PayPal's 'Pending' status corresponds to

*Queued.*

If your store is configured to use PayPal in 'Auth and Capture' mode, the status that follows *Not finished* or *Queued* is either *Processed* or *Failed*. The status *Processed* corresponds to the state 'The payment has been successfully processed by PayPal; the customer's card has been charged'. The status *Failed* corresponds to the state 'The transaction has been declined by PayPal'.

If your store is configured to use PayPal in 'Auth only' mode, the status that follows *Not finished* or *Queued* is either *Pre-Authorized* or *Failed*. The status *Pre-Authorized* corresponds to the state 'The payment has been successfully authorized'. The status *Failed* corresponds to the state 'The payment has been declined by PayPal'.

After the order's status is set to *Pre-Authorized*, you can either capture the authorized amount or void the transaction. If you choose to perform the 'capture' operation, you use the **Capture** button; after the authorized amount is captured, the status of the order is set to *Processed*. If you choose to perform the 'void' operation, you use the **Decline** button; after the authorization is voided, the status of the order changes to *Declined*.

Assigning any other statuses to PayPal orders has to be done manually by re-adjusting the value of the 'STATUS' box. For example, if an order successfully processed by PayPal and completed by the store needs to be marked as such, you will 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.

## 11.2 Authorize.Net

To set up the 'Authorize.Net: AIM' payment method in X-Cart, follow the steps below:

1. Add 'Authorize.Net: AIM' to the list of your store's payment methods:
  - a) In the 'Payment methods' section of your store's Admin area (Administration menu->Payment methods), scroll down to the 'Payment gateways' dialog box at the bottom of the page.

- b) Select 'Authorize.Net: AIM' from the list of payment gateways.
- c) Click the **Add** button.

A payment method titled 'Authorize.Net: AIM' is added to the bottom of the list in the 'Payment methods' dialog box.

## 2. Configure Authorize.Net: AIM:

- a) Click the 'Configure' link next to the 'Authorize.Net: AIM' entry in the 'Payment methods' dialog box. This opens the configuration page for Authorize.Net: AIM:

### Settings



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:

Action to be performed on order placement:

Supports 3-D Secure Payer Authentication. Go to [3-D Secure Transaction options](#) to enable it.



- b) Adjust the configuration settings for Authorize.Net: AIM by providing the following information:
  - Account type: Authorize.Net
  - API Login ID: Your Merchant account login.
  - Transaction key: Your Authorize.Net transaction key. To obtain this key, log in to the Authorize.

Net backoffice, click on Settings and Profile under the Security heading, then 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.

- Currency: The currency to be used in Authorize.Net transactions.
- MD5 hash value: The MD5 Hash Value to be used for MD5 security checks. To set this value, log in to the Authorize.Net backoffice, go to the Account page, scroll down to the Security Settings section and click on the MD5-Hash link.
- Test/Live mode: Select test or live mode from the drop-down box.

**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.

- Order prefix: The prefix to be used for orders paid via Authorize.Net: AIM (Any value, can be left blank).
- Action to be performed on order placement: The mode in which you wish payment transactions to be performed via Authorize.Net: AIM on order placement (*Auth only* or *Auth and Capture*).

c) Click the **Update** button.

3. Enable the 'Authorize.Net: AIM' payment method: In the 'Payment methods' dialog box (Administration menu->Payment methods), select the check box to the left of 'Authorize.Net: AIM' and click the **Update** button.

Authorize.Net supports 3-D Secure Payer Authentication. You can enable it in the General settings/3-D Secure Transaction options section.

## 11.3 eSelect plus

To set up the 'eSelect plus' payment method in X-Cart, follow the steps below:

1. Add eSelect plus to the list of your store's payment methods:
  - a) In the 'Payment methods' section of your store's Admin area (Administration menu->Payment methods), scroll down to the 'Payment gateways' dialog box at the bottom of the page.
  - b) Select 'eSelect plus' from the list of payment gateways.
  - c) Click the **Add** button.

A payment method titled 'eSelect plus' is added to the bottom of the list in the 'Payment methods'

dialog box.

<input type="checkbox"/>	eSelect plus		HTTP	All Premium Wholesale	999
	Extra charge: 0.00 \$				
Credit Card processor <b>eSelect plus</b> : <a href="#">Configure</a>   <a href="#">Delete</a>					
 Warning! eSelect plus is currently set up to work in test mode!					

Update

## 2. Configure eSelect plus:

- a) Click the '[Configure](#)' link next to the 'eSelect plus' entry in the 'Payment methods' dialog box. This opens the configuration page for eSelect plus:

### Settings

**Note:** The option Response Method in your eSelect account backoffice must be defined as "Displayed as key/value pairs on our server"  
You need to perform the following operations:

1. Login into Moneris merchant account backend.
2. Open Admin > DirectPost config page and generate new configuration or press on Edit button corresponding to already created configuration.
3. Tick "Displayed as key/value pairs on our server" option in the "Response Method" section. All other fields can be left as they are by default.
4. Enter the following information at the current page:  
**Store ID:** you need to copy PS Store ID value from the eSelect merchant account backend into this field  
**API Token:** you need to copy HPP key value from the eSelect merchant account backend into this field  
**Order prefix:** is for identification of your store on the payment gateway. It is a variable defined by you and used when you have more than one stores and in order payment gateway to distinguish your site from other of your sites. You can put any alphanumeric string into the "Order prefix" field or leave it empty.

Store ID:

API Token:

Account type:

Test/Live mode:

Order prefix:

3d secure:

**Note:** Only Direct Post solution is supported now, Hosted Paypage is unavailable. A PCI compliance certificate is required for Direct Post.

Supports 3-D Secure Payer Authentication.



b) Adjust the configuration settings for eSelect plus by providing the following information:

- **Store ID:** Your account Store ID. This is what you use to log in to your eSelect plus account.
- **API Token:** The value of the API Token from your eSelect plus account. To obtain this token, log in to your eSelect plus account, go to the ADMIN section and click "store settings" in the menu.
- **Account type:** USA or Canada.
- **Test/Live mode:** This option allows you to specify whether you wish to use eSelect plus in *test* or *live* mode.
- **Order prefix:** The prefix to be used for orders paid via eSelect plus.
- **3d secure:** This option allows you to specify whether you wish to use 3-D Secure Payer Authentication for eSelect plus.

- c) Click the **Update** button.
3. Enable the 'eSelect plus' payment method: In the 'Payment methods' dialog box (Administration menu->Payment methods), select the check box to the left of 'eSelect plus' and click the **Update** button.

## 11.4 CyberSource

To set up the 'CyberSource' payment method in X-Cart, follow the steps below:

1. Download 'Perl-linux-icsX.X.XX.tar.gz' archive:

[http://apps.cybersource.com/cgi-bin/pages/dev\\_kits.cgi?kit=SCMP\\_Clients/Perl/Linux](http://apps.cybersource.com/cgi-bin/pages/dev_kits.cgi?kit=SCMP_Clients/Perl/Linux) - for Linux

(Support Center :: Implementation :: Download APIs :: SCMP Clients :: Perl :: Linux)

[http://apps.cybersource.com/cgi-bin/pages/dev\\_kits.cgi?kit=SCMP\\_Clients/Perl/Windows](http://apps.cybersource.com/cgi-bin/pages/dev_kits.cgi?kit=SCMP_Clients/Perl/Windows) - for Windows

(Support Center :: Implementation :: Download APIs :: SCMP Clients :: Perl :: Windows).

2. Install ICS perl module at the server and create a folder "keys" in the directory where the perl module is installed. Specify this folder as a place to which Ecert utility should put certificates (please see README file included into archive).

**Note:** You will need to regenerate the keys regularly as they expire within twelve months of creation.

3. Add CyberSource plus to the list of your store's payment methods:

- a) In the 'Payment methods' section of your store's Admin area (Administration menu->Payment methods), scroll down to the 'Payment gateways' dialog box at the bottom of the page.

- b) Select 'CyberSource' from the list of payment gateways.

- c) Click the **Add** button.

A payment method titled 'CyberSource' is added to the bottom of the list in the 'Payment methods' dialog box.

4. Configure CyberSource:

- a) Click the 'Configure' link next to the 'CyberSource' entry in the 'Payment methods' dialog box. This opens the configuration page for CyberSource.

b) Adjust the configuration settings for CyberSource by providing the following information:

- Merchant ID: Your merchant ID.
- Full ICS path: Full path to the directory where ICS has been installed, for example '/home/user/perl/lib/ICS'.
- Server:Port: ics2test.ic3.com:80
- Currency: The currency to be used for CyberSource transactions.
- Order prefix: The prefix to be used for orders paid via CyberSource.

c) Click the **Update** button.

5. Enable the 'CyberSource' payment method: In the 'Payment methods' dialog box (Administration menu->Payment methods), select the check box to the left of 'CyberSource' and click the **Update** button.

## 11.5 Sage Pay (Protx)

**Important:** Sage Pay is formerly known as Protx.

Sage Pay is the large UK-based internet payment service provider which offers a range of services allowing you to securely process credit card payments online. Among the acquiring banks for the Sage Pay gateway are Lloyds TSB, Bank of Scotland, HSBC, JCB, American Express and other banking institutions. Sage Pay provides a number of different options for website payments. X-Cart is currently integrated with the following products: Sage Pay Form and Sage Pay Direct. The major difference between the two protocols is where you host the payment pages for you store.

### Sage Pay Form

With Sage Pay Form the payment pages are hosted on the side of Sage Pay; customers get redirected to the Sage Pay website during the purchase and enter their card details there. Sage Pay Form is generally recommended if you do not have enough resources to ensure adequate security of your your server/hosting account. And you must choose Form if your shared hosting account lacks a dedicated IP address, dedicated SSL certificate and/or one of the supported HTTPS modules (Net::SSLLeay, CURL, libCURL, OpenSSL or HTTPS-cli).

### Sage Pay Direct

With Sage Pay Direct the payment pages are hosted together with the rest part of your store; the data is transferred to Sage Pay in the background mode and customers never leave your website during the

purchase. If necessary, you can even use this advantage to white-label the payment process. Through, it is common practice that you tell your customers which provider is going to process their payment in case customer have concerns about card security.

To use Sage Pay Direct in your store you need:

- A dedicated IP address. Required to be able install a dedicated SSL certificate.
- A dedicated 128-bit SSL certificate to secure your payment pages. For recommended SSL certificate providers please check the X-Cart marketplace at <http://marketplace.x-cart.com/>.
- Any of the supported HTTPS modules (Net::SSLey, CURL, libCURL, OpenSSL or HTTPS-cli) installed on your server.

You must also be aware that now Visa, MasterCard and other major card issuing authorities have introduced strict rules and guidelines that cover any activity on collecting and storing card details. Since with Sage Pay Direct you will be collecting sensitive card info on your website, you will need to comply these rules and guidelines and undergo an audit to ensure that the data is protected well. If you do not wish to undergo such an audit, outsource the collecting of card info to Sage Pay by using Sage Pay Form.

## 11.5.1 Obtaining a Sage Pay Account

If you have not registered an account with Sage Pay yet, you should do it before you start setting up Sage Pay in X-Cart. To open an account, go to the Sage Pay website at <https://support.sagepay.com/apply/> and follow the instructions on the screen. After you have registered an account, you can set up Sage Pay Form or Sage Pay Direct in the X-Cart Admin area.

Alternatively, you can test Sage Pay without opening an account by using the gateway to the "simulator" operating mode.

## 11.5.2 Setting up Sage Pay Form

To use Sage Pay Form as one of the payment options in the store:

1. Log in to the X-Cart Admin area.
2. Go to the Payment methods section (Administration menu -> Payment methods) and scroll down to the Payment gateways form.
3. Select *Sage Pay (Form protocol)* from the drop-down list and click the **Add** button.

**Payment gateways**

Select the payment module to process customer credit cards

Payment gateways  [Add](#)

After you have clicked on **Add**, Sage Pay Form will be added to the list of the available payment methods.

**Payment methods**

[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="HTTI"/>	<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="HTTI"/>	<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"/>	<input type="text"/>	<input type="text" value="HTTI"/>	<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="Sage Pay (Form protocol)"/> Extra charge: <input type="text" value="0.00"/> \$ <input type="checkbox"/> Cash on delivery method	<input type="text"/>	<input type="text" value="HTTI"/>	<input type="text" value="All"/> <input type="text" value="Premium"/> <input type="text" value="Wholesale"/>	<input type="text" value="999"/>

Credit Card processor Sage Pay Form: [Configure](#) | [Delete](#)

 Warning! Sage Pay Form is currently set up to work in test mode!

4. Click on the [Configure](#) link. This opens the configuration page for Sage Pay Form.

**Settings**  
  
VendorName:   
  
Encryption password:   
  
Currency:   
  
AVS/CV2 checks:   
  
3D Secure checks:   
  
Test/Live mode:   
  
Order prefix:   
*it mustn't be empty*

5. Adjust the configuration settings for Sage Pay Form and click the **Update** button to apply the changes.

- VendorName: Enter the name of your merchant account with Sage Pay.
- Encryption password: Enter the code that you received from Sage Pay via email when registering an account.

The code, a mixture of 16 numbers/letters in both upper and lower case like oVPMeTE1xjXdT0nm, is used to encrypt order and customer data through a Simple XOR algorithm before it is sent to Sage Pay. Make sure that the encryption password you enter here coincides with the one in your Sage Pay back-office.

- Currency: Choose the currency in which you wish to accept payments through Sage Pay Form.
- AVS/CV2 checks: Choose whether you wish to use AVS and CV2 checking mechanisms and how.

The aim of these security checks is to provide you with additional information about the orders and reduce the risk of fake transactions.

AVS (Address Verification Service) checks whether the claimed billing address provided by the store customer coincides with the registered address of the cardholder. A successful result says that the ordering customer knows the cardholder's address, which is a good indication that they are the true cardholder.

CV2 stands for the last 3 or 4 digits of the number on the signature strip on the back of all debit and

credit cards. In order to enter the correct number, a person who places an order must either be the cardholder, or must have spied the CV2 number when handling the card.

The AVS/CV2 checking scheme has many benefits, but it also has a number of limitations. The most serious one is that AVS works only for the UK, and it is not possible to check AVS on overseas orders. It means that for all non-UK orders the check will always return a failure, and you can rely on the CV2 check only. Be aware that the gateway may automatically decline such orders if this behavior is forced in the AVS and CV2 Rule Base in the Sage Pay back-office.

- 3D Secure checks: Choose whether you wish to use the 3D Secure checking and how.

3D Secure is the technology behind the Verified by Visa and MasterCard SecureCode security initiatives, which provide for an additional technique for authenticating the cardholder at the time of the purchase.

**Note:** This 3D Secure checking mechanism is completely ensured by Sage Pay, and it does not relate to the X-Cart's 3-D Secure Payment Authentication.

- Test/Live mode: Choose the mode in which the gateways must operate.

The "test" mode means that you can submit test orders and perform test transaction. Money will not be withdrawn from credit cards. The "simulator" mode means that you can place test orders and perform test transactions without opening a Sage Pay account. The "live" mode is the full functioning mode with real transactions and charges. It must be used when only you are ready to go live.

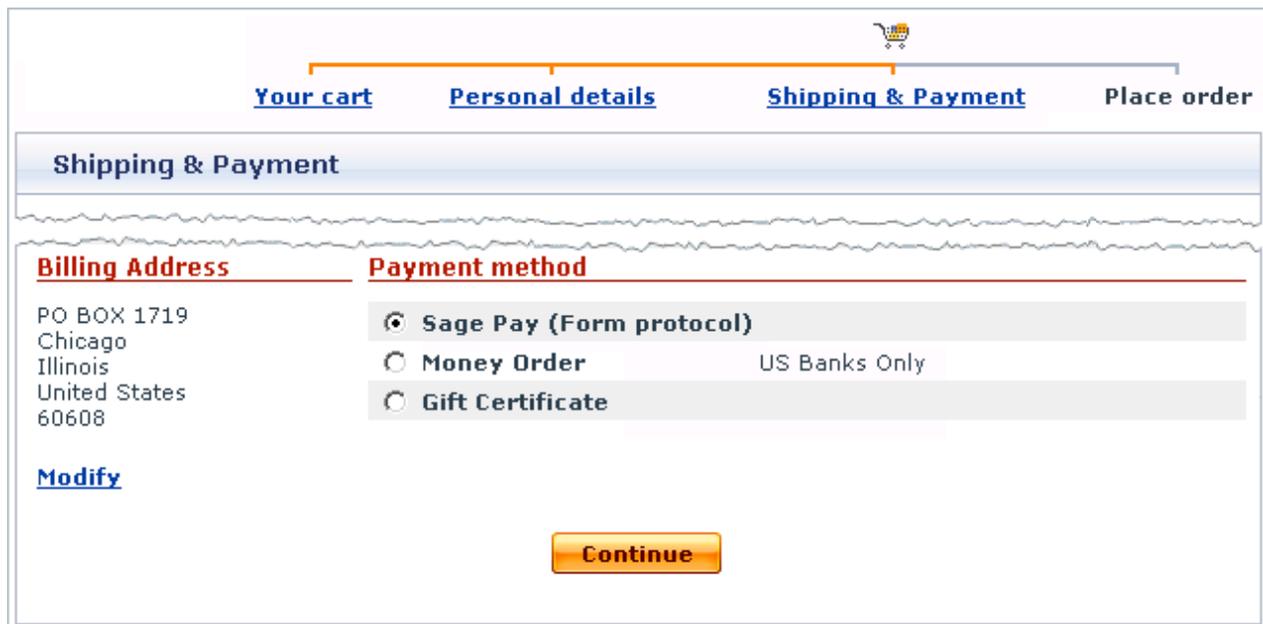
- Order prefix: Enter a prefix that will be automatically added to IDs of orders placed in your store and paid through Sage Pay Form.

Having a prefix ensures that orders will have unique IDs and will never coincide with orders placed in another online store of yours that also uses Sage Pay as a payment option.

6. Return to the list of payment methods and activate Sage Pay Form by selecting the check box next to the gateway's name.

7. Click the **Update** button.

After you have configured and activated the gateway, your customers will be able to choose Sage Pay Form as a payment option.



[Your cart](#) [Personal details](#) [Shipping & Payment](#) [Place order](#)

**Shipping & Payment**

**Billing Address**

PO BOX 1719  
Chicago  
Illinois  
United States  
60608

[Modify](#)

**Payment method**

Sage Pay (Form protocol)

Money Order US Banks Only

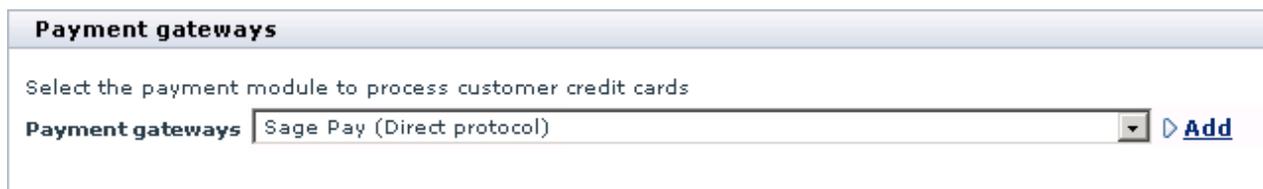
Gift Certificate

[Continue](#)

### 11.5.3 Setting up Sage Pay Direct

To use Sage Pay Direct as one of the payment options in the store:

1. Log in to the X-Cart Admin area.
2. Go to the Payment methods section (Administration menu -> Payment methods) and scroll down to the Payment gateways form.
3. Select *Sage Pay (Direct protocol)* from the drop-down list and click the **Add** button.



**Payment gateways**

Select the payment module to process customer credit cards

Payment gateways  [Add](#)

After you have clicked on **Add**, Sage Pay Direct will be added to the list of the available payment methods.

Payment methods					
<a href="#">Check all</a> / <a href="#">Uncheck all</a>					
	Methods	Special instructions	Protocol	Membership	Pos.
<input checked="" type="checkbox"/>	<input type="text" value="Credit Card"/> <b>Extra charge:</b> <input type="text" value="0.00"/> \$ <input type="checkbox"/> <b>Cash on delivery method</b>	<input type="text" value="Visa, Mastercard, American Express"/>	<input type="text" value="HTT"/>	<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"/> <b>Extra charge:</b> <input type="text" value="0.00"/> \$ <input type="checkbox"/> <b>Cash on delivery method</b>	<input type="text" value="Check payment"/>	<input type="text" value="HTT"/>	<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"/>	<input type="text"/>	<input type="text" value="HTT"/>	<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="Sage Pay (Direct protocol)"/> <b>Extra charge:</b> <input type="text" value="0.00"/> \$	<input type="text"/>	<input type="text" value="HTT"/>	<input type="text" value="All"/> <input type="text" value="Premium"/> <input type="text" value="Wholesale"/>	<input type="text" value="999"/>
Credit Card processor <b>Sage Pay Direct:</b> <a href="#">Configure</a>   <a href="#">Delete</a>  <b>Warning!</b> Sage Pay Direct is currently set up to work in test mode!					
<input type="button" value="Update"/>					

4. Click on the [Configure](#) link. This opens the configuration page for Sage Pay Direct.

### Settings

VendorName:

Currency:

AVS/CV2 checks:

3D Secure checks:

Test/Live mode:

Action to be performed on order placement:

Order prefix:   
*must not be empty in test mode*

5. Adjust the configuration settings for Sage Pay Direct and click the **Update** button to apply the changes.

- VendorName: Enter the name of your merchant account with Sage Pay.
- Currency: Choose the currency in which you wish to accept payments through Sage Pay Form.
- AVS/CV2 checks: Choose whether you wish to use AVS and CV2 checking mechanisms and how.

The aim of these security checks is to provide you with additional information about the orders and reduce the risk of fake transactions.

AVS (Address Verification Service) checks whether the claimed billing address provided by the store customer coincides with the registered address of the cardholder. A successful result says that the ordering customer knows the cardholder's address, which is a good indication that they are the true cardholder.

CV2 stands for the last 3 or 4 digits of the number on the signature strip on the back of all debit and credit cards. In order to enter the correct number, a person who places an order must either be the cardholder, or must have spied the CV2 number when handling the card.

The AVS/CV2 checking scheme has many benefits, but it also has a number of limitations. The most serious one is that AVS works only for the UK, and it is not possible to check AVS on overseas orders. It means that for all non-UK orders the check will always return a failure, and you can rely on the CV2

check only. Be aware that the gateway may automatically decline such orders if this behavior is forced in the AVS and CV2 Rule Base in the Sage Pay back-office.

- 3D Secure checks: Choose whether you wish to use the 3D Secure checking and how.

3D Secure is the technology behind the Verified by Visa and MasterCard SecureCode security initiatives, which provide for an additional technique for authenticating the cardholder at the time of the purchase.

**Note:** This 3D Secure checking mechanism is completely ensured by Sage Pay, and it does not relate to the X-Cart's 3D Secure Payment Authentication.

- Test/Live mode: Choose the mode in which the gateways must operate.

The "test" mode means that you can submit test orders and perform test transaction. Money will not be withdrawn from credit cards. The "simulator" mode means that you can place test orders and perform test transactions without opening a Sage Pay account. The "live" mode is the full functioning mode with real transactions and charges. It must be used when only you are ready to go live.

- Action to be performed on order placement: Choose whether Sage Pay must capture money automatically (*Auth and Capture*) or only freeze the funds until you capture the authorized amount manually through the X-Cart Admin area (*Auth only*).
- Order prefix: Enter a prefix that will be automatically added to IDs of orders placed in your store and paid through Sage Pay Direct.

Having a prefix ensures that orders will have unique IDs and will never coincide with orders placed in another online store of yours that also uses Sage Pay as a payment option.

6. Return to the list of payment methods and activate Sage Pay Direct by selecting the check box next to the gateway's name.

7. Click the **Update** button.

After you have configured and activated the gateway, your customers will be able to choose Sage Pay Direct as a payment option.



[Your cart](#)   
 [Personal details](#)   
 [Shipping & Payment](#)   
 [Place order](#)

**Shipping & Payment**

<b>Billing Address</b>	<b>Payment method</b>
PO BOX 1719 Chicago Illinois United States 60608	<div style="background-color: #f0f0f0; padding: 5px; margin-bottom: 5px;"> <input checked="" type="radio"/> <b>Sage Pay (Direct protocol)</b> </div> <div style="background-color: #f0f0f0; padding: 5px; margin-bottom: 5px;"> <input type="radio"/> <b>Money Order</b>                      US Banks Only                 </div> <div style="background-color: #f0f0f0; padding: 5px;"> <input type="radio"/> <b>Gift Certificate</b> </div>
<a href="#">Modify</a>	
<div style="background-color: #ffcc00; padding: 5px 15px; border: 1px solid #ccc; display: inline-block; cursor: pointer;"> <b>Continue</b> </div>	



# 12 Appendices

This section provides supplementary materials on the use of X-Cart:

- [Origin-Destination Tables for X-Cart's Real-time Shipping Modules](#)
- [Rules for Defining Hyperlinks](#)

## 12.1 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 (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

USA -> Worldwide

## 12.2 Rules for Defining Hyperlinks

On the pages of your store, you can provide hyperlinks to other resources on the Web. You can define hyperlinks using two types of paths: absolute and relative. Links to documents on other websites must be defined using absolute paths; for example, <http://www.google.com/index.html>. Links to documents on the same site with your store can be either absolute or relative, whatever is more convenient to you.

#### *Example 1.*

If your store's URL is <http://example.com>, and you wish to create a link from the page <http://example.com/home.php> to the script `script.php` located in the directory `sample_dir` ([http://example.com/sample\\_dir](http://example.com/sample_dir)), you should use one of the following paths:

- [http://example.com/sample\\_dir/script.php](http://example.com/sample_dir/script.php) (a full URL, including the domain name);
- [/sample\\_dir/script.php](/sample_dir/script.php) (an absolute path without the domain name);
- [sample\\_dir/script.php](sample_dir/script.php) (a relative path).

#### *Example 2.*

If your store's URL is <http://example.com/shop>, and you wish to create a link from the page <http://example.com/shop/home.php> to the script `script.php` located in the directory `sample_dir` ([http://example.com/shop/sample\\_dir](http://example.com/shop/sample_dir)), you should use one of the following paths:

- [http://example.com/shop/sample\\_dir/script.php](http://example.com/shop/sample_dir/script.php) (a full URL, including the domain name);
- [/shop/sample\\_dir/script.php](/shop/sample_dir/script.php) (an absolute path without the domain name);
- [sample\\_dir/script.php](sample_dir/script.php) (a relative path).

If you are planning to use X-Cart's HTML catalog feature, please be aware of the following: During the generation of an HTML catalog, X-Cart converts all the paths used in hyperlinks into full URLs. At present, the method of conversion provided by X-Cart works for all types of paths; however, the conversion of relative paths with the leading `./` or `../` (like `./script.php` or `../script.php`) results in really ugly full URLs: the resulting full URLs are inefficiently long and non user friendly. Until we provide a better method for

converting such paths, we recommend that you avoid using paths with the `./` and `../` indications.

Please note that the 404 error page shipped with X-Cart distribution package uses the `<base>` tag. When editing the file `404_US.html`, you can find this tag in the head of the document. This tag defines the path to your store's root. Because the 404 error page uses this tag, all the hyperlinks in it are based on relative paths. If you decide to edit the hyperlinks included into your store's 404 error page, remember that you must create them using relative paths - as long as you keep the `<base>` tag. If you decide to remove the `<base>` tag from the source code of the 404 error page, any hyperlinks will have to be based on absolute paths.



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