





# X-Cart v. 4.3.0

## User manual

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*This is the User manual for X-Cart shopping cart software, v. 4.3.0. This manual covers the installation and use of X-Cart 4.3.0 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 4.3.0.*

## **X-Cart v.4.3.0. User Manual.**

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## Welcome to X-Cart 4.3.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 4.3 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 4.3](#) for details on the new features introduced in X-Cart 4.3.
- 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>).

### X-Cart Support Team

The X-Cart Support engineers will advise you about backing up your store and restoring it from the backup. The Support team is available to registered X-Cart license owners only and must be addressed through your personal Help Desk account at <https://secure.qtmsoft.com>.

### ▪ X-Cart Community Forums

The X-Cart Community Forums provide you with an opportunity to discuss X-Cart related issues with other community members. The Forums are available at <http://forum.x-cart.com>. For security reasons, some topics and threads at the forums are open to registered X-Cart license owners only.

### ▪ X-Cart Knowledge Base (Beta)

The X-Cart Knowledge Base is a growing collection of small articles that reveal and describe some specific questions and situations concerning the X-Cart functionality. The knowledge base gets widened by X-Cart adepts from among X-Cart users and by the X-Cart support engineers according to their real-life experience in using and maintaining X-Cart based stores.

**Important!** At the moment the X-Cart knowledge base undergoes beta testing and must not be regarded as an official service provided by the X-Cart Team.

## 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>

Type of task	Administrator account is used to:	Provider account is used to:
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 membership groups</li> <li>• view customers' orders and change their statuses if necessary</li> <li>• view store statistics</li> <li>• import/export all types of X-Cart store data</li> <li>• generate a static HTML version of the product catalog (HTML catalog)</li> </ul>	<ul style="list-style-type: none"> <li>• set discounts that will be applied to orders exceeding specific amounts</li> <li>• view customers' orders</li> <li>• import/export some types of X-Cart store data (product information, destination zones, shipping/tax rates, orders)</li> </ul>
Customizing the 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</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</li> </ul>

Type of task	Administrator account is used to:	Provider account is used to:
	<p>database tables, check database integrity, clear statistics, clear templates cache, remove unwanted data, etc</p> <ul style="list-style-type: none"> <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>	<p>server using X-Cart's file manager</p>

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 4.3

Here's a list of improvements introduced in X-Cart 4.3:

### Design and appearance

- Two new skins have been added to the set of available skins: Light & Lucid 2-column and Vivid Dreams Cromo.
- Ajax technology is used to make working with the store quicker and easier. There are now options in admin area, which allow to enable adding products to cart on product details and products list pages, refreshing only the minicart and product control elements (quantity select box, buttons). The products can

now also be rated without the current page being reloaded.

The whole page does not have to be refreshed, thus making for a very slick user experience.

- A quick search panel is now available in the admin area. It is used to search for the necessary item among several object types: users, products and orders. To fine-tune the search results you may wish to force the system to search among products, users or orders only. An admin with 'Fulfillment staff' membership is not allowed to search for products and users.
- Instead of always using one WYSIWYG editor, it is now possible to select from three editors: CKEditor, TinyMCE, or InnovaStudio WYSIWYG editor. There is a special option in Admin area, which controls which of the editors will be used to edit HTML contents without having to spell out HTML tags.
- The store admin can now choose the way the language selector looks like in the customer area. The language selector can be configured as a old style drop-down box, as a single line of text with language codes/names or as a single line of language icons (defined by the store administrator in the General settings/Appearance options section).

## Shipping & payment modules

- All the shipping and payment modules have been updated to current API documentation.
- The following payment modules have been added:

Amazon Simple Pay

ChronoPay

ePDQ (XML)

CyberSource (Hosted page)

CyberSource (SOAP toolkit)

eProcessingNetwork. Web-based.

eSelect Plus (Hosted page)

First Data Global Gateway (Connect)

GoMerchant - EZ Payment Gateway Secure Payment Form

HSBC Secure E-Payment Service (XML)

NAB Transact Hosted Payment Page

Netbilling gateway - Payment Form

PayPoint Fast Track

Post Finance (Advanced e-Commerce)

viaKlix 2.0 (Provided Form)

Virtual merchant (Provided Form)

- The following payment modules have been removed (due to the fact that these payment gateways/systems are obsolete or we were not able to contact them to make sure they are live and get updates from)

3Delta Systems

Cardia Shop

Censeo (no dialog)

Censeo (dialog)

CentiPaid

GoChargelt

CyberPac (LaCaixa)

Credomatic

CyberSource

DataTrans.Standard

TransFirst eLink (Server based solution)

Payment Express (Hosted payment page)

Direct Payment Solution: PX POST

EasyPay

E-Dinar

EFSnet

E-Gateway (Mantis Technologies)

Ezic. Direct mode V3.x

FirePay

Clear Commerce (PayFuse)

MerchantPartners

IntelliPay: ExpertLink

Jettis

Lynk Systems

AccessPoint (MerchantManager)

MultiPay

NetPay

PayBox

PayGate

PayNet

PayPro

PaySystems

PayWeb

PayZip.Net: Web2Web

PayGateway (Paradata Systems)

Pasat Internet

PaySystems Client

PSW Billing

RTWare: ADC Direct Response

Saferpay

Scopus Tecnologia

SECPay

Slim CD

Docdata Payments

TrustCommerce

TotalTrans

uSight

VaultX

WebCraft/Transactium

Wells Fargo

YellowPay

YourPay

ZipZap

PayByCheck

WTSbank

- Google Checkout module now supports the Carrier calculated shipping feature, that enables Google to dynamically request rates from shipping carriers based on the order information. Google supports the carrier-calculated shipping feature for three carriers: FedEx, UPS and the U.S. Postal Service (USPS).

## Miscellaneous

- Countries data has been updated according to ISO-3166
- A storefront open/close indicator has been added to the admin area. There is an indicator, showing whether the customer area is open or closed, and a switch, allowing to close or open it respectively.
- The "Add to list" button functionality has been improved: it is now possible to select whether you want to add the product to wishlist, to comparison list or to a gift registry (and specify the required gift registry).
- X-Cart installation script has been updated: new layout has been integrated, additional checks for system requirements have been added, the error handling behavior has been improved, skin preview has been improved, etc.
- Smarty changes: Smarty has been updated to the version 2.6.26.

## Add-ons

- X-AOM add-on has been included into the core X-Cart as Advanced Order Management (AOM) module and has been extended with order modifications history functionality. The module now tracks order changes and keeps their history.
- X-RMA add-on has been included into the core X-Cart as RMA module and now includes some improvements of inventory tracking for confirmed return requests.

- X-FancyCategories add-on has been included into the core X-Cart as Flyout Menus module and extended with 'tree-like expanding' menu style.
- X-FeatureComparison: some minor improvements have been made: it is now possible to specify short feature descriptions, to disable search by some features, and to search by features in one of "All words/Any word/Exact phrase" mode.
- X-Configurator: it is now possible to specify a base price for a configured product, to specify a default product for a slot, and to specify a quantity limit for product in slots. The layout of configurator pages has also been improved.
- X-SpecialOffers: the procedure of specifying the offer conditions on products is now more flexible (product sets can be used). Free bonus products are now automatically added to the cart. Applying global discounts and coupons to already discounted (by special offers) items can now be disabled, etc.
- X-GiftRegistry: orders can now be gift-wrapped, and the price of gift wrapping be included into the order total. A couple of other minor improvements have been done.
- X-Survey includes some minor improvements in logic (generally, code optimization) and layout design.
- X-Affiliate: some improvements of banner system have been done. Multi-level affiliate plans logic has been improved. Partner statistics reports are now made more detailed.
- X-Magnifier: it is now possible to import hi-res images and batch re-slice these images for displaying in the magnifier window. The magnifier window itself has also undergone some changes.

Please read the CHANGELOG for more details.

## 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).

## Registering a license

A fresh installation of X-Cart is licensed for evaluation purposes only. Since X-Cart shopping cart is provided

to you with open source code, you can customize its design and functionality in the way you need it. However, you must keep the evaluation notice visible on all storefront pages without having to scroll the pages down until you purchase a paid license.

To upgrade your license please purchase X-Cart paid license and register your copy as follows:

1. Make sure that no HTTP-authorization and firewall restrictions are set on incoming HTTP-connections to your X-Cart installation.
2. Login to your [private members area](#) with your username and password.
3. Go to "My licenses" section.
4. Check whether the license URL is correct. If it is not, follow the "Change URL" link to the right from the license URL and replace the license URL with the correct X-Cart installation URL.
5. Follow "Register" link to the right from the license URL.
6. Open the "Summary page" in your X-Cart installation in order to ensure that registration was successful.
7. In case any problems arise during purchase or registration please contact us.

### **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 4.3.

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 >= 32M

recommended values:

disable\_functions = NULL

post\_max\_size >= 2M

upload\_max\_filesize >= 2M

max\_execution\_time >= 30

memory\_limit >= 64M

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::SSLeay, CURL, OpenSSL, https\_cli), GnuPG/PGP.
- PHP functions "popen()" & "pclose()" must be allowed for the correct functioning of some HTTPS modules (CURL, Net::SSLeay, 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 4.3.0 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 64 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

You can install the X-Cart shopping cart either manually or using the automated Installation Wizard that will do the most of the necessary jobs for you. The recommended method is to install X-Cart through the Wizard; manual installation should be performed by advanced users when it is impossible to install the software through the Wizard. For instruction on how to install X-Cart refer to the following sections of the manual:

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

The instructions are the same both for X-Cart Gold and X-Cart Pro.

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

To install X-Cart using the Installation Wizard:

1. Download a distribution package from the File Area section of your HelpDesk account at <https://secure.gtmssoft.com/>.

The package you need is contained in the archive file x-cart-x.y.z.tgz, where x, y and x stand for the X-Cart version.

2. Put the files in the package to a web-accessible directory of your server or your hosting account.

- If you use a Windows-based server, or a UNIX-based server without terminal access.

- a) Decompress the archive with the package to a directory on your local computer.

To decompress the archive, use your favorite compression program like WinZIP or any other similar tool with support for TAR files.

- b) Use an FTP client to upload the files and folders in the archive to the web-accessible directory of your server or your hosting account.

Make sure that the default file and directory structure of the package is retained.

- If you use a UNIX-based server with terminal access.

- a) Use an FTP client to upload the archive with the distribution package to the web-accessible directory of your server or your hosting account.

b) Decompress the package using one of the following commands.

```
gunzip < x-cart-x.y.z.tgz | tar -xvf -
```

or

```
tar -xzvf x-cart-x.y.z.tgz
```

As a result of extracting files from the archive, you should get the directory `/xcart` that would contain all X-Cart files and folders. The directory `/xcart` is created automatically; if necessary, you can rename the directory or move its content to a different location, e.g., your web root. Further in this manual we will refer to the directory with the X-Cart files and folders as the *X-Cart root directory*, *X-Cart installation directory* or */xcart directory*.

3. If you are installing X-Cart on a UNIX-based server, change the permissions for the `/xcart` directory, the configuration file `config.php`, and the scripts `admin/newsletter.sh` and `payment/*.pl` as shown below.

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

4. Use your favorite web browser to run the installation script `install.php`.

To run the script correctly, in the address bar of your browser type the URL of the X-Cart installation directory followed by the script's filename. For example, if your domain name is `www.example.com`, and the X-Cart files are in the directory `/xcart` in your web root, the URL should be `http://www.example.com/xcart/install.php`.

This will open the Installation Wizard that will guide you through the installation process and help you install X-Cart. The Wizard includes several steps, and at every step the Wizard solves some specific tasks like checking server environment, gathering necessary details, etc. The picture below shows you a sample step of the Wizard. Beneath the header, the page is divided into two sections. The section on the left shows you the progress of the installation process: the name of current step appears in dark blue, the steps that have been completed successfully are marked in green, the forthcoming steps are shown in grey. The section on the right contains different details about the current step of the installation process.

It is important to complete all the steps of the Wizard. At the final step the Wizard will display a screen saying that the installation is complete.



# XCART Installation

Version 4.3.0

---

**Installation steps**

- ✓ License agreement
- ➔ **PHP Configuration**
- Installing X-Cart database
- Setting Layout
- PayPal payment processing
- System fingerprint



## Checking PHP configuration (passed)

### Environment checking

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

Checking file permissions	Status
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 ...	- [OK]
Checking whether directory "var/cache" is writable .	- [OK]
Checking whether file "config.php" is writable ...	- [OK]

### Inspecting server configuration

Checking critical dependencies	Status
PHP Version (min 4.1.0 required) ... 4.4.9	- [OK]
PCRE extension is ... On	- [OK]
PHP Safe mode is ... Off	- [OK]
ini_set PHP function is ... Enabled	- [OK]
File uploads are ... On	- [OK]
magic_quotes_sybase PHP option is ... Off	- [OK]

Checking blowfish encryption mode ... OK
- [OK]

< Back
Next >

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5. Follow the instruction on the screen to complete all the steps of the Installation Wizard.

The steps of the Wizard are described below in the order how they appear. To move between the steps,

use the buttons **Back** and **Next**.

#### a) License agreement

At the first step of the Installation Wizard, you are supposed to accept the X-Cart Software License Agreement. Read the Agreement thoughtfully, and select the check box below the text of the Agreement.

**Important:** By selecting the check box you confirm that you agree with all the terms and conditions expressed in the X-Cart Software License Agreement. If you do not agree with any part of the Agreement, do not install the software and quit the Installation Wizard by closing the respective page of the web browser.

SOFTWARE LICENSE AGREEMENT

Copyright (c) 2001-2009 Ruslan R. Fazliev <rrf@rrf.ru>  
All rights reserved.

PLEASE READ

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I accept the License Agreement

If it is not the first time that you have run the installation script `install.php`, the Wizard will ask you to enter an authorization code for the existing copy of X-Cart. The authorization code (Auth code) is used in X-Cart to prevent unauthorized access to the installation scripts, and you need to enter the Auth

code every time you re-install X-Cart, or change the skin, or install an add-on module.



New installation  
 Re-install skin files  
Auth code:   
This is a protection from unauthorized use of installation script  
 I accept the License Agreement

**Note:** If you do not remember the Auth code, find it in the Summary section of the X-Cart Admin area (Administration menu -> Summary). Alternatively, retrieve the code from the variable `$installation_auth_code` in the file `include/install.php` inside the X-Cart installation directory.

Click the **Next** button.

#### b) Checking PHP configuration

At this step, the installation script checks that the web server meets the minimum system requirements, verifies that the files and folders from the distribution package have not been modified, and checks that the necessary files and folders have correct permissions. The test result is displayed in a special table that contains the list of tested requirements and the status of every tested parameter. A sample test result is shown in the picture below.

Environment checking	
Verification steps	Status
Verifying the integrity of essential files ...	- [OK]
Checking file permissions	
Verification steps	Status
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 ...	- [OK]
Checking whether directory "var/cache" is writable ...	- [OK]
Checking whether file "config.php" is writable ...	- [FAILED]
Checking whether file "admin/newsletter.sh" is executable ...	- [WARNING]
Checking whether file "payment/ccash.pl" is executable ...	- [WARNING]
Checking whether file "payment/csrs.pl" is executable ...	- [WARNING]
Checking whether file "payment/netssleay.pl" is executable ...	- [WARNING]
GD library 2.0 ... OK	- [OK]
Checking blowfish encryption mode ... OK	- [OK]

The statuses mean as follows:

- **[OK]** - Requirement is satisfied completely);
- **[FAILED]** - Requirement is not satisfied. Installation cannot be continued as this dependency is critical;
- **[WARNING]** - Requirement is not satisfied. Installation can be continued as this dependency is not critical.

Ideally, all the parameters in the test result should have the [OK] status. It is also recommended that you solve the issues with the [WARNING] status. The issues marked with the [FAILED] status must be fixed without fail. Otherwise you will not be able to continue with the installation and use X-Cart.

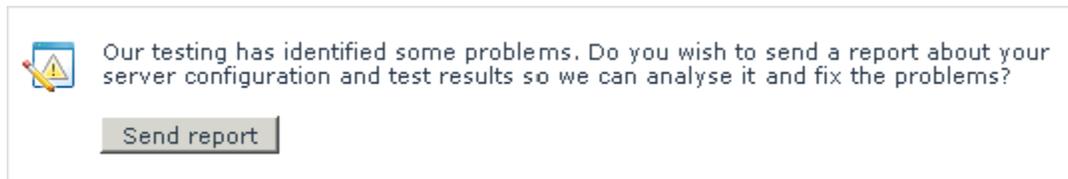
To help you find out how to fix a particular issue, for each failed requirement the Wizard provides a short description and a possible solution. This information is presented in special warning messages on the right to the test results. The detected issues are grouped according to the failure type: environment checking errors, failed critical dependencies and failed non-critical dependencies.

-  **Environment checking errors**  
Installation cannot be continued, because some vital files and directories have wrong permissions.  
[+ See details](#)
-  **Critical dependencies failed**  
**Unsupported version of PHP - 4.0.0.** Web server must support PHP 4.1.0 or better.  
[+ See details](#)
-  **Non-critical dependencies failed**  
**Vital files and directories do not have correct file permissions.**  
[+ See details](#)

To see the available information about a particular error or failure, click on the [+ See details](#) link. This will expand the warning message and open a description of a possible solution.

If you are not sure you have enough resources to fix the detected issue(s) on your own, you can send a report to the X-Cart Support Team so that they could provide you with a solution. The report would contain a detailed description of the detected issue(s) together with some important information about your web server configuration.

To send the report click the **Send report** button below the the warning and error messages.



This will open a new screen with an automatically generated technical report and a text field where you can put your comments.

**Technical problems report:**

```
X-Cart version: Version 4.3.0
-----
Report time: Tue, 26 May 2009 15:40:08 +0400
-----
HTTP_REFERER: http://www.example.com/xcart/install.php
-----
ENVIRONMENT CHECK ERRORS:
-----
- Installation cannot be continued, because some vital files and directories
have wrong permissions..
[CHECK RESULT]:

files - Please grant writable permissions on the "files" directory.
On a UNIX operating system this can be done with the help of the following
command:
chmod 700 /u/usr/public_html/xcart/files
skin1 - Please grant writable permissions on the "skin1" directory.
On a UNIX operating system this can be done with the help of the following
command:
chmod 711 /u/usr/public_html/xcart/skin1
-----
NONCRITICAL ERRORS:
-----
- Vital files and directories do not have correct file permissions. [CHECK
RESULT:
```

**Additional comments:**

If necessary, put your comments to the Additional comment field and click the **Send report** button to send the report with your comments (if any) to the X-Cart Support Team. Your message will be posted to the HelpDesk system as a regular support ticket, and will be processed by our Support Team, who will post their reply in the same ticket. To read the answer of the responsible support engineer you will need to log in to your HelpDesk account at <https://secure.qtmsoft.com>.

Click the **Next** button.

### c) Preparing to install X-Cart database

Here you must specify the host name of the server on which you are installing the store, the host name of your secure (HTTPS) server and the details of the MySQL database that will keep all your store's data.

**Please enter your web server details and MySQL database information:****Server host name**

Host name of your server (e.g. www.example.com)

**Secure server host name**

Host name of your secure (HTTPS) server (e.g. secure.example.com)

**X-Cart web directory**

Web directory where X-Cart files are located. Leave empty for webroot. (e.g. /xcart)

**MySQL host name**

Host name of MySQL server. It can be host name or IP address

**MySQL database name**

The name of the database you connect to

**MySQL user name**

The name of the MySQL user

**MySQL password**

Which password to use for MySQL

**Your e-mail address**

This address will be used as default for company options

The fields in this form mean as follows:

- **Server host name:** The host name of the server on which you are installing your copy of X-Cart.
- **Secure server host name:** The host name of the secure server that will provide access to your X-Cart based store via the HTTPS protocol.

**Important:** Server host names must not include the protocols ('http://' or 'https://' prefixes). Enter only the domain name, e.g., *www.example.com*. Also pay attention that the name of the secure HTTPS server can either coincide with the name of the HTTP server or have a different name. If you do not have an HTTPS server now, or if you do not remember its name, instead of the secure server name temporarily enter the name of your HTTP server. 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:** The web-accessible directory of your server or hosting account where X-Cart files are located.

**Note:** As a rule, the installation script detects this directory automatically; however, if the detection has not been a success, you need to enter the name of the appropriate web directory 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 to the web root, leave the field empty.

- **MySQL host name:** The DNS name or the IP-address of your MySQL server.

- MySQL user name: The username for your MySQL user account.
- MySQL database name: The name of your MySQL database.
- MySQL password: The password for your MySQL user account.

**Note:** The database server name is typically *localhost*, but it is not the rule and the actual name of the database server may be different. If you do not know the name of your database server, your database name, etc. please check it with your hosting provider.

- Your e-mail address: The email address that you would like to use as a default company email address. This address will be assigned to the default Administrator and Provider (in X-Cart Pro) accounts that are created automatically during the installation. If necessary, you will be able to change the default email address after the installation is complete. An email notification about the successful installation of X-Cart software will also be sent to that address.

Click the **Next** button to continue. This will reload the page and you will see a new screen that will display the information that you have entered at the previous screen and a few more fields.

<b>Server host name</b> Host name of your server (e.g. www.example.com)	www.example.com
<b>Secure server host name</b> Host name of your secure (HTTPS) server (e.g. secure.example.com)	www.example.com
<b>X-Cart web directory</b> Web directory where X-Cart files are located. Leave empty for webroot. (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	xcart@example.com
<b>Languages</b> Languages you want to install (use Ctrl key to select multiple options)	<input type="text" value="US"/>
<b>States table</b> States of the country where the shop is located (use Ctrl key to select multiple options)	<input type="text" value="Luxembourg, Netherlands, Spain, United Kingdom (Great Britain), United States"/>
<b>Sample categories/products</b> Would you like to setup sample categories and products?	<input type="text" value="Yes"/>
<b>Configuration settings</b> Apply pre-configured settings to selected country	<input type="text" value="United States"/>
<b>Update config.php only</b> Tick this if you want to skip database setup (no data will be installed in the database)	<input type="checkbox"/>
<b>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.	<input type="text"/>
<b>Store images in</b> Select where you want to store your images	<input type="text" value="File system"/>

The fields in this form mean as follows:

- **Languages:** The languages that you wish to use in your store. By default X-Cart is delivered with the English language pack only, and English is selected as an only language to be installed. Later on you will be able modify the default set of languages in the Languages section of the Admin area. The instructions on how to manage languages are available in the [Managing Languages](#) section of

this manual.

- **States table:** 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.

In the selectbox you can choose as many countries as you wish. To select a country, simply click on its name and highlight the item. 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*.

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.

- **Sample categories/products:** The installation script enables you to import a sample product catalog so that you could test the newly installed store. The sample catalog here is very 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) . 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. To import the sample catalog, select *Yes*; otherwise, select *No*.
- **Configuration settings:** For some countries X-Cart allows you to use 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.

If you find it helpful to use these pre-configured settings to make the process of configuring your store faster, choose the name of your country from the drop-down box. The installation script will import settings for the selected country then.

- **Update config.php only:** This option allows you to decide if you wish to preserve the data in the MySQL database that you have specified at the previous screen. If you leave the check box unselected, the installation script will drop all the existing X-Cart tables in the database, create new tables and populate them with new data. If you select the check box, the installation script will only update the information in the X-Cart configuration file config.php, but keep the existing database untouched.
- **Blowfish key:** You should complete this field only if you are installing X-Cart with a database that was used by another X-Cart installation and you want to preserve the data from the database. If you complete the Blowfish key field, make sure the Update config.php only check box is selected.

- Store images in (*Database / File system*): This setting allows you to choose where you wish to keep the store images (including product thumbnails and full-size product images, category icons, etc.): on the file system where X-Cart is installed or in the X-Cart database. Storing images in the database makes it easier to backup images, because they will be kept directly in the database dump. Storing images on a file system makes the database more compact and generally increases the performance level of your store.

Click the **Next** button.

#### d) Installing X-Cart database

Now the installation script updates the main configuration file config.php and writes the server and MySQL details that you have specified at the previous step of the Installation Wizard. If you have also forced to perform any of these tasks, the script updates the database, populates the database with demo data, import states, moves images to the file system, etc.

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

Creating tables...

Please wait ...
[OK]

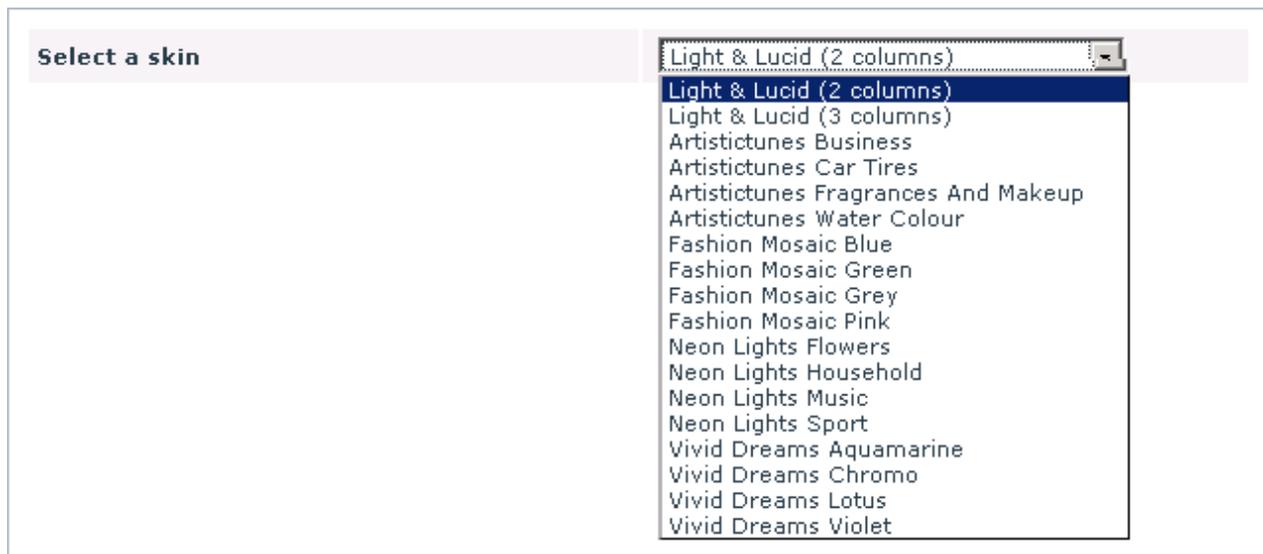
Please wait ...
Creating table: [xcart_benchmark_pages] ... [OK]
Creating table: [xcart_categories] ... [OK]
Creating table: [xcart_categories_lng] ... [OK]
Creating table: [xcart_categories_subcount] ... [OK]
Creating table: [xcart_category_bookmarks] ... [OK]
Creating table: [xcart_category_memberships]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

**Important:** Depending on the performance level of your server, this process may take several minutes; however, it should not take more than 5-6 minutes.

Click the **Next** button.

#### e) Layout settings

At this step of the Installation Wizard, you can choose a skin for the Customer area (storefront) of your store. To choose a skin you need to select the skin name from the drop-down box.



Click the **Next** button.

The installation script will check the existing skin files (if any). If any of the existing skin templates were ever modified, the system will display a message saying that such templates have been found. To see the list of templates, click on the [Click here to see the file\(s\)](#) link.



You can choose the keep the modified templates and preserve the modifications, overwrite the modified templates and loose the modifications, or cancel the installation. The latter option is good

when you want to backup the modified files before you resume the installation. Use the button **Back** and **Next** to either return to the previous screen where you can choose a different skin or move to the next step and continue the installation.

f) **Setting up templates**

Now the installation script creates the necessary X-Cart folders and copies the files for the chosen skin. After the process is completed, the installation script will display a preview of the Customer area with the chosen skin. If you want to choose a different skin, click the **Back** button and move to the previous step of the Installation Wizard. If you are satisfied with the preview and wish to accept the skin, click the **Next** button to move to the next step and continue the installation.

**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] ... [Already exists]

**Copying templates...****Creating layout...**Layout preview ([click to refresh](#))**g) PayPal payment processing**

At this step the Installation Wizard you can enable the PayPal payment method in your store. To enable PayPal right now, select Yes from the Do you wish to enable PayPal payment processing now? drop-down box. Or select No to skip this step.

Do you wish to enable PayPal payment processing now?

**Note:** Do not worry about making the final decision right now: you will be able to enable/disable

PayPal in the Admin area of your store later.

Click the **Next** button.

#### h) Enabling PayPal payment processing

You get to this step only if you chose to enable the PayPal payment method. Here you are supposed to specify the email address that your current PayPal account is registered to or the email address that you wish to use for registering with PayPal (if you do not have an account yet).

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 area at any time later.

Click the **Next** button to move to the next step and continue the installation.

When the installation is complete, the installation script will send a verification message to the email address provided at this step. To enable PayPal payments in your store, follow the link in the message. If you did not have a PayPal account before you started to install X-Cart, you need not create one right now. When somebody pays for the products in your store using the PayPal payment method for the first time, you will receive an email message from PayPal saying that there is a payment waiting for you at that email address and you need to open an account in order to receive the payment. If you miss opening an account within a limited period of time, PayPal will consider the payment to be unclaimed and send the money back to the person who made the payment.

#### i) Generating a system fingerprint

Now the installation script generates the system fingerprint.

In X-Cart, a system fingerprint is a list of MD5 checksums of all X-Cart files. The system fingerprint generated during the software installation captures the default/unmodified state of the store and can be used later to control the integrity of the store files. For details, see the [System Fingerprints](#) section further in this manual.

When the the fingerprint is generated, you will see a message saying that the system fingerprint has been generated successfully.

```
Generating the system fingerprint.  
This may take several minutes, please be patient  
.....  
System fingerprint is successfully generated
```

**Note:** System fingerprint generation may take several minutes, please be patient.

Click the **Next** button.

j) **Installation complete**

This is the final step of the Installation Wizard. Here the installation script reports that X-Cart has been installed successfully and provides direct links to the Customer, Admin and Provider areas of your store. For the Admin and Provider areas the page displays the default login credentials (a username and a password) generated during the installation. Do not forget to change the default passwords after you have logged in to either the Admin area or the Provider area for the first time.

In addition, the message also contain the authorization code (Auth code) for the installed copy of X-Cart. The code is used to prevent unauthorized access to the X-Cart installation scripts, and you will be asked to provide the Auth code if you decide to reinstall X-Cart, change the skin, or install an add-on module. It is not necessary to remember the as you will be able to find it in the Summary section of the Admin area or retrieve it from the variable `$installation_auth_code` in the file `include/install.php` in the X-Cart root directory.



To prevent unauthorized access to the X-Cart source code, remove the archive with the X-Cart distribution package from web-accessible directories on your server.

X-Cart installed successfully. To access your store, use the links below:

[Customer area](#)

[Administrator area](#) [ username: **master**, password: **8eada93** ]

Auth code is **BG6GJH39**.

Auth code is used to prevent unauthorized access to the X-Cart installation scripts. If you decide to reinstall X-Cart, change a skin or install an add-on module, you will be asked to enter this code first. It is not necessary to remember this code: when needed, you can find it in the Summary section of the X-Cart Admin area. Besides, the auth code together with other info is sent to your email address

**xcart@example.com**

Installation script `install.php` renamed to **install-file-09-05-26-1d6cb.php**.

The file has been renamed to prevent unauthorized access to the X-Cart installation script `install.php`. In the future, if you wish to reinstall X-Cart or change a skin, rename the file back to `install.php` first.

**Thank you for choosing X-Cart, the powerful and reliable platform  
for your online business.**

All this information will be duplicated to email address that you specified as the company email address at the step "Preparing to install X-Cart database".

## 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.

To install X-Cart manually:

1. Download a distribution package from the File Area section of your HelpDesk account at <https://secure.gtmssoft.com/>.

The package you need is contained in the archive file `x-cart-x.y.z.tgz`, where `x`, `y` and `z` stand for the X-Cart version

2. Use an FTP client to upload the archive with the distribution package to a web-accessible directory on your server or your hosting account.

- 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
```

As a result of extracting files from the archive, you should get the directory /xcart that would contain all X-Cart files and folders. The directory /xcart is created automatically; if necessary, you can rename the directory or move its content to a different location, e.g., your web root. Further in this manual we will refer to the directory with the X-Cart files and folders as the *X-Cart root directory*, *X-Cart installation directory* or */xcart directory*.

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

```
> cd xcart
```

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

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

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

<password> : 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.

- 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<username> -p<password> -h<db_host> <db_name> < sql/dbclear.sql
```

```
> mysql -u<username> -p<password> -h<db_host> <db_name> < sql/xcart_tables.s
```

```
> mysql -u<username> -p<password> -h<db_host> <db_name> < sql/xcart_data.sql
```

```
> mysql -u<username> -p<password> -h<db_host> <db_name> < sql/xcart_language
```

- If you want to test the installed store and import a sample product catalog and other demo data, 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<username> -p<password> -h<db_host> <db_name> < sql/xcart_demo.sql
```

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

- 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 following shell command

```
> mysql -u<username> -p<password> -h<db_host> <db_name> < sql/states_<country>
```

replacing the *<country>* 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 the settings are available for the following countries: Australia, Canada and the United Kingdom (Great Britain). To import the settings for any of these countries, run the following shell command

```
> mysql -u<username> -p<password> -h<db_host> <db_name> < sql/xcart_conf_<country>
```

replacing the <country> 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 (2 columns) for the Customer area.

b) If you want to replace the default skin Light & Lucid (2 columns) 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
light_and_lucid	Light & Lucid (3 columns)
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_aquamarine	for Vivid Dreams Aquamarine
vivid_dreams_chromo	for Vivid Dreams Chromo
vivid_dreams_lotus	for Vivid Dreams Lotus
vivid_dreams_violet	for Vivid Dreams Violet

- c) After you have copied 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 *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 `$blowfish_key` variable in the `config.php` file. With manual installation, a new Blowfish key is never generated. And when the installation is complete, the `$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.

## 2.2.3 Security related tips

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

### 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.

## 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.

## 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.

For all X-Cart files and directories secure permissions must be set. 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 `config.php` file must be edited very carefully, because these settings affect the 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 contains variables which keep the details of the MySQL database that you use for your X-Cart based store. X-Cart uses the values of these variables to connect to the database. If the variables contain incorrect values, X-Cart will not 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 of the variables according to the information

that you provide at the third 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 information 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 change.

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 contains variables which keep the information about the physical location of the X-Cart files. X-Cart uses the values of these variables to correctly address the scripts, templates and other X-Cart files. If the variables contain incorrect values, X-Cart will not be able to 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 the information that you provide at the third 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 applies to the situation when 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 = "";
```

It is also possible that you 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 a 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 information 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 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 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 other 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

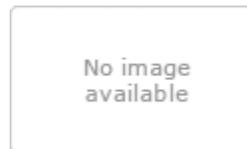
level of the environment that is used to operate the store (including servers and local computers) which can hardly be ensured by an individual or a medium-size business. Remember: when keeping checking account details in the store database, any possible vulnerability of the environment may result in 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.



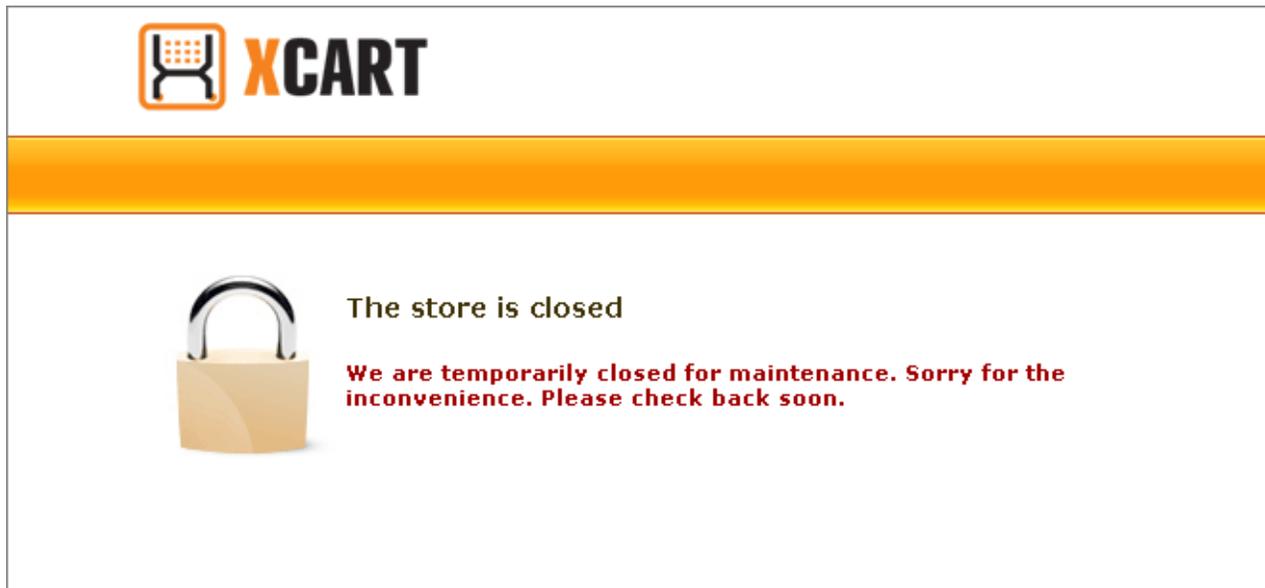
default\_image.gif

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 of the Customer area when your store is temporarily 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. Setting the value to 'false' restores the normal mode where your store providers can control their products only and can have their 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 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 define the amount of the debugging information which can be displayed in 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. 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 the USE\_DATA\_CACHE constant are 'true' and 'false'. By default the value is set to 'true'. It means that caching is enabled.

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

Changing the value to 'false' is reasonable only if 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 the functionality for blocking access to the Admin area of your store from unknown IP addresses. The two possible values for the SECURITY\_BLOCK\_UNKNOWN\_ADMIN\_IP constant are 'true' and 'false'. By default the value is set to 'false'. It means that the Admin area can be accessed from any IP address. Before changing the value of this constant, study section [User Access Control](#) further in this manual.

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

#### ▪ **USE\_SESSION\_HISTORY**

This constant allows you to enable the functionality for synchronizing user sessions of the primary store domain and additional domain aliases. The two possible values for the USE\_SESSION\_HISTORY constant are 'true' and 'false'.

The value of this constant must be set to 'true' if you use domain aliases for the Customer area of your store and wish to be able to simultaneously work both with the Admin and Customer areas without losing your current user session.

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

#### ▪ **FORM\_ID\_ORDER\_LENGTH**

The FORM\_ID\_ORDER\_LENGTH constant defines the length of a list with unique form identifiers which are used in X-Cart to protect the store against CSRF (cross-site request forgery) attacks.

For each user session, the system generates an ordered list of unique identifiers and assigns them to every X-Cart's page opened by the user which contains a submittable HTML form designed for sending input data using the POST method.

These identifiers are intended to ensure authenticity of every single form: each time the user is trying to submit a form, X-Cart checks whether the form identifier is in the list. If yes, the form is considered genuine (i.e. generated by X-Cart during the current session) and, thus, safe for sending input data. If the identifier is missing from the list, the form is treated as suspicious, and no input data can be submitted through it.

The number of identifiers in the list corresponds to the value of the `FORM_ID_ORDER_LENGTH` constant. By default the value is set to 100. It means that for every section the list can contain no more than 100 unique identifiers. And at one time X-Cart will consider as genuine no more than 100 forms. If the number of forms opened by the user during one section exceeds the value defined by `FORM_ID_ORDER_LENGTH`, X-Cart will remove from the list the earliest identifiers and replace them with new identifiers for the recently opened forms.

By editing the value of the `FORM_ID_ORDER_LENGTH` constant you can increase or decrease the number of forms that will be concurrently considered as genuine. If the value is not declared or is less than 1 or is set to a non-numeric value, it will be automatically set to 100.

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

### **FRAME\_NOT\_ALLOWED**

This constant allows you to prohibit opening X-Cart in an iFrame. If the value of the `FRAME_NOT_ALLOWED` constant is set to 'true', the system will detect any attempt to open X-Cart in an iFrame and force to open it in a main window instead.

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

### **Section marked "NEVER CHANGE THE SETTINGS BELOW THIS LINE MANUALLY"**

The `config.php` file contain a section saying:

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

You must never edit variables in this section, because it will apparently destroy your store.

For example, this section contains the variable `$blowfish_key`. This variable keeps your store's Blowfish key that was automatically generated during the X-Cart installation. This key is used to encrypt and decrypt all the sensitive data in your store database including user passwords, credit card info, etc. Since the data is already encrypted, editing the value of the `$blowfish_key` variable manually will corrupt all user passwords (including the administrator password) and you won't be able to use the store. You must also be aware of the fact that a lost Blowfish key cannot be restored, and the X-Cart Support team will **not** be able to help you regain access to your store if you remove or change the value of the `$blowfish_key` variable.

If for some reason you need to re-generate the Blowfish key generated during the installation, use the built-in X-Cart facility described in the [Re-generate the Blowfish Encryption Key](#) section of this manual.

## 2.3.2 Configuration File top.inc.php

The configuration file top.inc.php is a plain text file located in the X-Cart root directory. It keeps global definitions and directives for the operating environment of the installed copy of the X-Cart software. The values of the variables inside the top.inc.php file must be edited very carefully, because these settings affect the general operating capability of your store.

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

### Directories structure definitions

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

The variable \$xcart\_dir keeps the location of the directory where X-Cart is installed. By default its value is set to 'realpath(dirname(\_\_FILE\_\_))', where \_\_FILE\_\_ is the PHP constant representing the absolute filepath to top.inc.php. On some operating systems the \_\_FILE\_\_ constant can be set up in a way that makes it impossible to define the location of the X-Cart installation directory. For example, on SunOS the constant \_FILE\_ for included files contains a relative filepath instead of the absolute filepath. As a result of this, the value of the variable \$xcart\_dir sets to '/' which is wrong.

If a similar problem causes errors on your server (e.g., if you keep getting error messages saying "Cannot include file"), change the value of \$xcart\_dir manually by replacing the 'realpath(dirname(\_\_FILE\_\_))' part with an 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 is used to define the locations of script repositories for different X-Cart interfaces (Customer, Administrator, Provider and Partner areas). By default the scripts that control the Customer area are located in X-Cart root directory, the scripts that control the Admin and Provider areas are located in directories

/admin and /provider, respectively. If you use a copy of X-Cart together with the X-Affiliate add-on module, the X-Cart root directory includes the directory /partner containing the scripts that control the Partner area.

If necessary, you can change the locations of the script repositories by editing the values of the respective constants.

*Example 1:*

If your copy of X-Cart is installed to /home/user/public\_html/xcart, the script files for the Customer area are located in the X-Cart root directory and the Customer area is available at <http://www.example.com/xcart>, the DIR\_CUSTOMER constant must be set up as follows:

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

*Example 2:*

If your copy of X-Cart is installed to /home/user/public\_html/xcart, the script files for the Customer area are located in the folder customer/ and the Customer area is available at <http://www.example.com/xcart>, the DIR\_CUSTOMER constant must be set up as follows:

```
define ('DIR_CUSTOMER', '/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>/](http://<xcart_http_host>/<xcart_web_dir>/<dir_customer>)

**Admin area:** [http://<xcart\\_http\\_host>/<xcart\\_web\\_dir>/<dir\\_admin>/](http://<xcart_http_host>/<xcart_web_dir>/<dir_admin>)

**Provider area (X-Cart PRO):** [http://<xcart\\_http\\_host>/<xcart\\_web\\_dir>/<dir\\_provider>/](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 ( Settings 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. The top navigation bar includes the X-Cart logo, a user login status ('admin is logged in !'), and a language selector set to 'English'. A left sidebar contains menu categories: 'Management' (with links like 'This month's orders', 'Search for orders', 'Statistics', 'Edit ratings', 'Users', 'Membership levels', 'Titles', 'Files', 'Import/Export'), 'Catalog' (with 'Categories', 'Add new product', 'Products'), and 'Settings' (with 'General settings'). The main content area is titled 'General settings' and contains the following text: 'Main page :: General settings', 'You have selected to edit the general configuration of your store. The fields and options presented below enable you to control the store operation.', and a list of subsections under 'In this section:'. These subsections are: Appearance options, 3-D Secure Transaction options, Company options, Contact us form options, Email options, Email notifications options, General options, Logging options, Product search options, Security options, SEO options, Shipping options, and User Profiles options. Below this is a 'Modules options' section with links for Advanced Statistics, Antifraud Service, Bestsellers, Customer Reviews, and Detailed Product Images. A diagram with arrows and yellow boxes highlights the navigation structure. One box points to the top of the 'General settings' section, and another points to the 'General options' subsection under '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.
- Show quantity selector as input textbox: If enabled, the quantity selector is displayed as an input textbox. If the option is disabled, the quantity selector is displayed as a selectbox.
- Maximum number of selections in quantity selectbox: The maximum number of items a customer can see in the quantity selectbox for each product (This number corresponds to the largest number of product items which a customer can add to the shopping cart at a time).

- Enable 'Buy Now' button in the products list: If enabled, a 'Buy Now' button is added below each product description in the Products list. Customers can use this button to add a product to the shopping cart directly from the Products list without going to the Product details page.
- Display products list in multiple columns (1-3) (leave empty to use standard format): The number of columns (1-3) in which products are arranged in the Products list.
- Display only featured products list in multicolumn format: If 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.
- Select active language from: This option controls the way the active language is selected in the customer area. Select from *drop-down select box, single-line select box (text), and single-line select box (icon)*.
- 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.
- Display template variables in the debug pop-up window: If enabled, smarty template variables will be displayed in the debug pop-up window.
- Display estimated template compile time: If enabled, the estimated time of template compilation is displayed.

### 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 emails

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 emails' 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 email 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 email address: for notifications about newly created, modified and deleted user profiles.
- Orders department email address: for notifications about placed orders and changed order statuses, product quantity warnings etc.
- Help/Support department email 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 email 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
<b>Orders department notification:</b> mail/order_notification_admin.tpl mail/mail_header.tpl mail/order_invoice.tpl main/order_status.tpl mail/order_data.tpl mail/signature.tpl mail/init_order_notification_subj.tpl <b>Provider notification:</b> mail/order_notification.tpl mail/mail_header.tpl mail/order_invoice.tpl main/order_status.tpl mail/order_data.tpl mail/signature.tpl mail/init_order_notification_subj.tpl	<b>Orders department notification:</b> mail/html/order_notification_admin.tpl mail/html/mail_header.tpl mail/html/order_invoice.tpl main/order_status.tpl mail/html/order_data.tpl mail/html/signature.tpl  <b>Provider notification:</b> mail/html/order_notification.tpl mail/html/mail_header.tpl mail/html/order_invoice.tpl main/order_status.tpl mail/html/order_data.tpl mail/html/signature.tpl

- 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 email 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/pre-authorized' notification to customer: If selected, a customer gets a notification when his or her order gets queued (the status 'Q') or pre-authorized. 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. You can also see if your shop is open or closed at the top of each page in the Admin area:



**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 email 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::SSLeay, 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.

- **HTTPS proxy:** If you are using Curl or LibCurl, enter the HTTPS proxy data in the required format. Some parts may be omitted, the following variants are possible:

username:password@host:port

username:password@host

username@host

username@host:port

host:port

host

If no proxy should be used, leave the field empty.

- 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.

**Note:** Benchmarking is disabled for the following pages:

- HTML catalog generation
- Import/Export of data
- Tools
- Payment info uploading

These operations take a long time, and as a result the benchmarking data take too much memory allocated to PHP.

- 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 email addresses to which log notifications must be sent:

Into the field 'Notification email addresses (use ',' to separate multiple email addresses)', enter a list of email 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

- Default site 'Title' tag: Enter the default text to be used in the title tag of all the site pages.
- 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.
- Use canonical URLs for storefront pages: This option helps to improve the standing of every single storefront page with Google, Yahoo! and other search engines by clearing up returned search results for the store. See <http://googlewebmastercentral.blogspot.com/2009/02/specify-your-canonical.html> for details.

### 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:



#### Warning



Access to the resource you are requesting is allowed only for registered IP addresses. The IP addresses you are currently using is not registered with the system. A request for registering you IP addresses has been sent to the store administrator.

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 email 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.

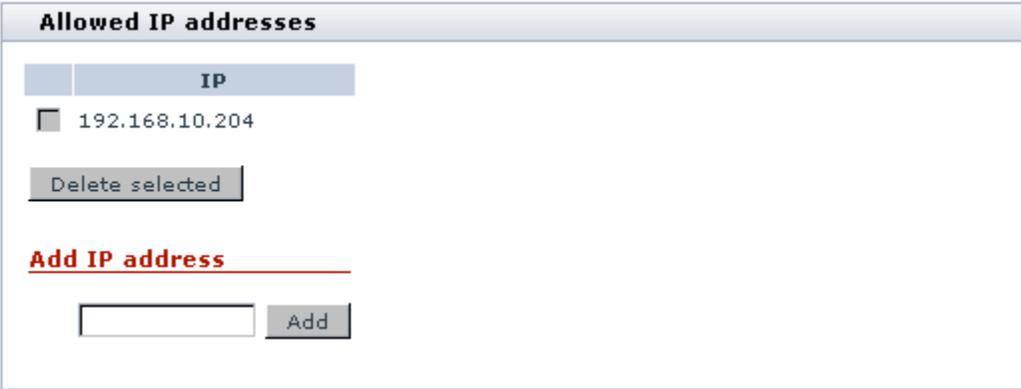
## Managing your store's list of allowed IP addresses

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:



IP
192.168.10.204

Delete selected

**Add IP address**

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 address registration requests	
	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.

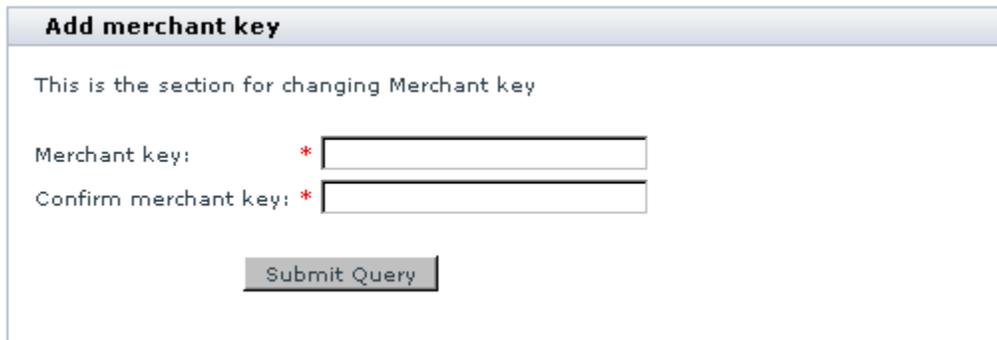
## Merchant key-based encryption

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:

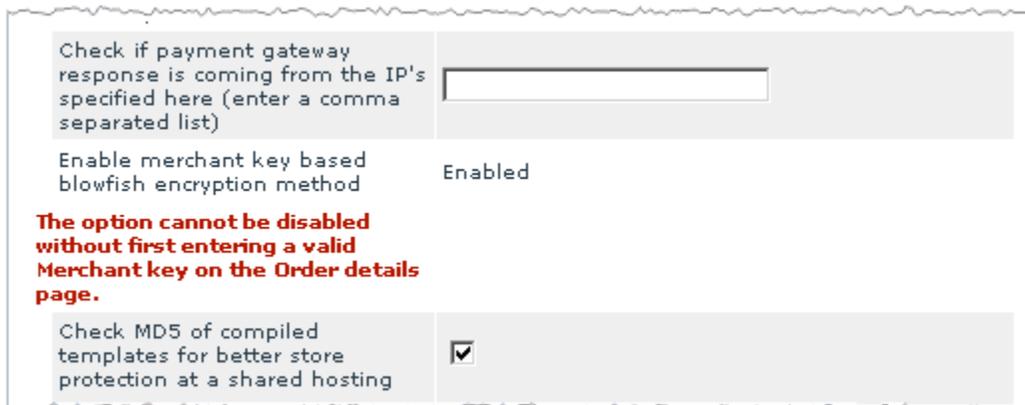
1. Go to the 'General Settings/Security options' section of the Admin area.

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)

Enable merchant key based blowfish encryption method  Enabled

**The option cannot be disabled without first entering a valid Merchant key on the Order details page.**

Check MD5 of compiled templates for better store protection at a shared hosting

This means the option cannot be disabled until you get authorized. Go to the 'Orders Management' section (Administration menu->Search for 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
```

```
XIYVzylMtVuy3c0f8dZfTXw0qDftBTvA66ERJZeOY19VFIYK/RRSCAqGCgitHPY
```

```
atRukC93953FPM12U1bEHITV7F6IDPKCcVyBnbQIgwI2rS2PLBNpCkVy4uN4ZuH
w+obtB1KQpwXuxwgiLak6wPLrn6FPWoNL2Yw8ZxMz862Nc4HinZtACkw+AT0dhIU
IFsL38LifAu5iC7dkSGe5D80tgrV1VEx9D6LOiw64QgA2NgUUgEQeuoB4xR2x7Za
2hz5AUyOu15fqyV01veg7EUFohGa4hHxjxegUrSkCPRk4mpIEZJ9gh7j+h+o8otA
+9Z3YzEsrQbdJKeuK/SH8he6qjohO9KzpEhqomVcrgwR6+AhpjXNpdcl8xKVOevn
Phwed7oFSyJCRih2Q3EwJMd7rB+vaAWtLgeG9jgjS5njld3QdfcvL8dDGXW6HjrV
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.
```





```
yTZW+oRLl6QLjMDQTVy4YrMA5eGFmGx9C8sxFhQPASNq1Bu+hLQjSm9obiBTbWl0
aCA8am9obi5zbWl0aEBleGFtcGxlLmNvbT6IZAQTEQIAJAUCQoHhEwIbAwUJACeN
AAYLcQgHAWIDFQIDAxYCAQIEAQIXgAAKCRFCFPQd8/uEYgTXHAJ0Y33tia6tnUHpm
o/qhRalpXm+5/wCfRpxiQ1SI8FQYOTJP4ZNtlh5ESHa5Ag0EQoHhGRAIAON902gU
dsoDyNV+nVZQdwntqNiDfifOpNP+gGHQsYzH5cu0YC3mxFGjZK2s3/0GPq9+5AYW
lkkYlvompmmKTF8rYXT7vnSizFiUSf4V+63XzSxnY3NexIyjj94Lvpz66SOJXq3
K3P/jax1lb8tQxKU/gl0HuynKlRI1YuEXIDx4xfXqtnFHbF+a+GqERz9MlCpq3Zt
lHq/4becsx9zfWVxsduzRn/3J+bRLmXYOCQNMom9kNmzH8RMz96q4J5Q8+b+GDO
V0swG3xcy3OZpTwtqPQ84LmqcCmMVUfi7tN1EH++J+ClnCx2u6eOb/2kPUON03BP
WHfWANCn+LniEb8AAwUIAM64Cx2ryhHtjJtizFAsU3V4tH256cHdPaijSRoNcy9L
YJinDgDl90CEvcF9ME7E3Ly6+aWBBcCw3ghXQQUFO/Xc7DN1hvcWN5dDWf4lPt2Z
Xo/dYjwHjD+PaOQoxeZ6SDmXWxGwoF83ygLDVVX9b8gaHW0GI588v+62h0RVKRIa
caivXdDTqh80lh8N9CVGoIFS3uA8nRxDG1jjWawcHdN14wyRqdXlz+a4/RK+ZlUx
oJ2dIQokiQEEhohMzmvd/lXXjCzKnQjpEs5HUTgL/3HmgCyAM7tAzcUJccAI3iHw
nM1m9m+mEQWLIX6zillOo/IsV2GOJ/EJlhdjRD2yyX6ITwQYEQIADwUCQoHhGQIb
DAUJACeNAAAKCRFCFPQd8/uEYgVazAJ9DreCt0WFKyGwRhyifIeSGTHFUKwCgzShE
V17tla6xCz7L+RArsXjrsVk=
=ow2K
-----END PGP PUBLIC KEY BLOCK-----
```

## PGP

The process of creating and using keys for PGP is similar to that for GnuPG. You need to create a key and then export it with armor (--armor or -a for GnuPG, or its analog for PGP).

### 3.2.4 3-D Secure Payment Authentication

3-D Secure™ is an XML-based protocol used as an added layer of security for online credit and debit card transactions.

X-Cart supports 3-D Secure™ transactions with the multiple credit card processors such as:

- AuthorizeNet: AIM,
- USAePay,
- Netbilling,
- eSelect plus,

**Note:** only Direct Post solution is supported now, Hosted Paypage is unavailable. eSelect plus also

requires a PCI compliance certificate for Direct Post.

- 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:



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 ( Settings 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	Canada	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
GL	Greenland	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PM	St. Pierre and Miquelon	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>US</b>	<b>United States</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

The links provided at the top of the 'Countries' dialog box ([All regions](#), [North America](#), [Europe](#), etc) allow you to view and manage sets of countries located in the named regions.

Table columns provide the following information:

- **CODE** - ISO 3166-1 alpha-2 country codes (unique two-letter codes assigned to countries). These codes are used for X-Cart's inner processes and also appear in 'State' drop-down boxes when the JavaScript version of X-Cart's state and county selector is disabled.
- **COUNTRY** - Country names.
- **HAS STATES** - Check boxes whose status indicates absence/presence of states in a country. You do not need to worry about adjusting 'has states' boxes if you are not going to use the JavaScript version of X-Cart's state and county selector. However, if you wish to use the JavaScript selector and enable the respective option in General settings->General options, you need to have reliable information as to the territorial division of countries to which you are going to sell products. At least, you need to keep enabled the check boxes of countries for which you are going to define states. You also do not want to disable 'has states' check boxes for countries of whose 'has states' status you are not sure (If it

turns out such a country really has states, customers from this country will be able to enter state names using an input box).

- **ACTIVE** - Check boxes whose status defines whether a country is included into 'Country' drop-down menus or not (Only countries whose 'active' check box is selected are included). By default, all the countries in the table are active. If you need to limit the number of countries from which profile registrations will be welcome, deactivate all the countries that you do not want to be included.

**Note:** The country displayed in the table against a darker grey background is the country of location of your default customer.

### Adding/deleting countries

The set of countries that can be used in an X-Cart based store is rigidly defined in the system, so you cannot add new countries to the list or delete existing ones. What you can do is edit country names, activate/deactivate specific countries and change their 'has states' statuses.

If you do not wish some of the countries to appear in 'Country' drop-down boxes on user registration/user profile forms, simply deactivate the countries that you wish to be excluded.

If a country you need is not on the list of available countries, request assistance from X-Cart technical support team.

### Editing countries

To edit a country name, find the name in the table, replace it with a new one and click the **Update** button.

To change a country's 'has states' status, adjust the check box opposite its name in the HAS STATES column and click the **Update** button.

To activate/deactivate a country, select/unselect the check box opposite its name in the ACTIVE column and click the **Update** button. You can use the [Check all](#) / [Uncheck all](#) links located above the 'Countries' table to select or unselect all the 'active' check boxes on the current page. You can also activate/deactivate all the countries in the table regardless of the country set selected with a single click: by using the buttons **Activate All** and **Deactivate All**.

### Multilingual support for countries

It is possible to have different names for your active countries that will be used depending on the language selected for the interface. Names for countries can be created using the 'Edit languages' section of your store (Administration menu->Languages).

To add country names in a language that does not yet have its own names for countries:

1. Go to the 'Edit languages' section.
2. Select the necessary language for editing. Make sure the charset specified in the 'Edit language' form is correct. If not, enter the necessary charset code and click 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 (Settings 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: 100%;" type="text"/>	<input style="width: 100%;" 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 (Settings 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 (Settings 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 (Settings 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 (Settings 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 (Settings 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 (Settings 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](#)

<input type="checkbox"/> <a href="#">Australia Post</a>	7 active method(s) out of 7	<a href="#">Options &gt;&gt;</a>
<input type="checkbox"/> <a href="#">DHL/Airborne</a>	7 active method(s) out of 7	<a href="#">Options &gt;&gt;</a>
<input type="checkbox"/> <a href="#">Canada Post</a>	24 active method(s) out of 24	<a href="#">Options &gt;&gt;</a>
<input type="checkbox"/> <a href="#">DHL</a>	0 active method(s) out of 1	
<input type="checkbox"/> <a href="#">FedEx</a>	20 active method(s) out of 20	<a href="#">Options &gt;&gt;</a>
<input type="checkbox"/> <a href="#">UPS</a>	32 active method(s) out of 32	
<input type="checkbox"/> <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 Settings 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 Settings 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 Settings 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 Settings 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 Settings 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 Settings 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 (Settings 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 email with your username, password and the test server name. Reply to the email 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 email 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 email

- d) Click **Save**.

4. Adjust USPS options:

- a) Go to the 'Shipping methods' section of your store's Admin area (Settings 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 (Settings 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	
Packaging type:	Package ▾
Ship in a specified number of days:	1
Additional protection type:	Not required ▾
Additional protection value in \$:	0
Hazardous Materials:	<input type="checkbox"/>
COD payment:	Cashier's Check or Money Order ▾
COD value in \$:	0
Allow customers to provide their own DHL/ Airborne account at checkout:	<input type="checkbox"/>
Maximum package weight (lbs)*:	0 (Should not exceed 149 lbs)
Maximum package dimensions (inches)*:	Length: 0 x Width: 0 x Height: 0
Always use the same package dimensions as specified in the "Maximum package dimensions" fields:	<input type="checkbox"/>
<p>* 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).</p>	
<input type="button" value="Apply"/>	

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 (Settings 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

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

**Carrier type:**

**Packaging (FedEx Express):**

**Packaging (FedEx Ground):**

**Dropoff type:**

**Ship date (days):**

**Currency code:**

---

#### 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:**

- Adjust the settings in the 'FedEx options' dialog box according to your preferences.
- 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 (Settings 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 (Settings 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 (Settings 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 (Settings 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.
  - Apply rate to: Select from *DST (Discounted subtotal)* or *ST (Subtotal)* to determine whether shipping should be calculated as a percentage from subtotal with or without discount (if any).
  - 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 (Settings menu->Shipping markups).

**Note:** The 'Shipping markups' item appears in the Settings 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:	5.00	-	9.99	Flat charge (\$):	0.00	Percent charge (%):	0.00
<input type="checkbox"/>	Order subtotal range:	0.00	-	999999.9	Per item charge (\$):	0.00	Per lbs charge (\$):	1.00
<input type="checkbox"/>	Weight range:	10.00	-	19.99	Flat charge (\$):	15.00	Percent charge (%):	0.00
<input type="checkbox"/>	Order subtotal range:	0.00	-	999999.9	Per item charge (\$):	0.50	Per lbs charge (\$):	0.00
		Delete selected		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 'Settings' -> '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 'Settings' -> '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 (Settings menu->Taxes). A dialog box titled 'Taxes' opens:

TAX	APPLY TAX TO	PRIORITY	STATUS
There are no taxes defined			

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:

Taxes				
Check all / Uncheck all				
	TAX	APPLY TAX TO	PRIORITY	STATUS
<input type="checkbox"/>	VAT17_5	DST+SH	<input type="text" value="10"/>	Enabled ▾
<input type="checkbox"/>	VAT5	DST+SH	<input type="text" value="20"/>	Enabled ▾
<input type="button" value="Update"/>		<input type="button" value="Delete selected"/>		
<input type="button" value="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 (Settings menu->Taxes).

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 ( Settings 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			
<b>Tax rates</b>			
Check all / Uncheck all			
ZONE	MEMBERSHIP	RATE VALUE	APPLY TAX TO
No tax rates defined			
<b>Add tax rate</b>			
<b>Rate value:</b> *	<input type="text" value="0.00"/>	%	
<b>Zone:</b> *	<input type="text" value="Zone Default"/>		
<b>Membership:</b> *	<input type="text" value="All"/> <input type="text" value="Premium"/> <input type="text" value="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.			
<b>Apply tax to:</b>	<input type="text" value="="/> <input type="button" value="Undo"/> <input type="button" value="Redo"/> <input type="button" value="Clear"/>		
	<input type="button" value="+"/> <input type="button" value="-"/> <input type="button" value="*"/> <input type="button" value="/"/>		
	<input type="text"/>	<input type="button" value="Add"/>	
	<input type="text"/>	<input type="button" value="Add"/>	
	<input type="button" value="Add"/>		

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	<input style="width: 80px;" type="text" value="17.500"/> %	DST+SH

---

**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:**

=

+ - \* /

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.

Apply tax to: \* =DST+SH

Undo Redo Clear

+ - \* /

Add

Add

The field at the top of the editor is intended for your tax base formula. The formula field is not manually editable - to enter your formula into this field, you will need to provide components for the formula using the fields and buttons below. Your formula will be assembled from the components you provide.

It is possible to provide the following components:

- mathematical signs (plus, minus, multiplication, division);
- variables symbolically representing objects that need to be taxed or should be used for calculating the tax (subtotal amount, discounted subtotal amount, shipping cost, amount levied in the form of some other tax defined in your store and applied to the purchase);
- numbers.

Mathematical signs are used to indicate the operations that need to be performed on the other components of the formula. They can be added to the formula by clicking the appropriate buttons: [ + ] for addition, [ - ] for subtraction, [ \* ] for multiplication, and [ / ] for division.

Variables can be selected from the drop-down box below the row of buttons with mathematical signs. In the list of variables that can be selected, *ST* stands for 'Subtotal amount', *DST* - for 'Discounted subtotal amount', *SH* - for 'Shipping cost'. Taxes are labeled by their own names. To add a variable, select it from the drop-down box and click the **Add** button next to it.

Numbers can be added using the input field located below the drop-down box with the list of available variables. To add a number, simply type it into the input field and click the **Add** button on the right-hand side of the field.

For example, if you want your tax to be applied to the sum of discounted order subtotal and shipping cost:

- a) Select *DST* from the drop-down box, click 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"/>
<input type="button" value="Update"/>	

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%	\$100.00	\$100.00
1	SKU17514	Product_2	Sales tax: 5%	\$49.00	\$49.00
<b>Delivery method: <u>UPS 2nd Day Air</u></b>					
			<b>Subtotal:</b>	<b>\$149.00</b> (€ 129.63)	
			<b>Shipping cost:</b>	<b>\$13.73</b> (€ 11.95)	
			<b>Sales tax 5%:</b>	<b>\$7.45</b> (€ 6.48)	
			<b>TOTAL:</b>	<b>\$170.18</b> (€ 148.06)	

When this option is disabled, the column with tax rates for each product is not displayed.

- Enable tax exemption for customers: This option defines whether tax exemption feature for customers is enabled at your store or not. When this option is enabled, a check box 'Tax exemption' is added to the 'Profile details' page for customers.

**Note:** You can use this check box to specify whether the customer should be taxed or not (A selected

check box corresponds to 'This customer is should not be taxed', an unselected check box - to 'This customer should be taxed').

When this option is disabled, the 'Tax exemption' check box does not appear.

- Allow customers to modify their tax number after tax exemption is enabled: This option defines whether customers can modify their tax number after tax exemption has been enabled in their profile. You may want to keep this option disabled to prevent customers from changing their tax numbers without your knowing.

**Note:** This option works only if the field 'Tax number' is enabled for customer user profiles via General settings->User Profiles options and the option 'Enable tax exemption for customers' is enabled.

To adjust the options:

1. Select the check boxes for the options that need to be enabled. Unselect the check boxes for the options that need to be disabled.
2. Click the **Update** button to apply the changes.

### 3.5.5 Applying Taxes to Products

After the necessary taxes have been configured, they need to be applied to products. This step is very important, because taxes will not work until you tell X-Cart to which products you wish them applied to.

The 'Product details' dialog box (the one you will use to add/modify products - see the section [Adding Products](#) further in this manual for details) contains a field 'Apply tax'. This field is a selectbox providing names of all taxes defined in the store. When creating a new product, you will use the 'Apply tax' field to apply taxes to your products.

To apply one or more taxes to a product:

1. Find the product to which you would like to apply taxes and open it for modification. A dialog box titled 'Product details' opens.
2. In the 'Apply tax' field of the 'Product details' dialog box, highlight the name of the tax that needs to be applied to the product. If you need to highlight more than one tax, hold down the CTRL key while selecting the desired names of taxes with your mouse.
3. Click the **Save** button to apply the changes.

If the same tax or set of taxes need to be applied to more than one product, you can apply them simultaneously to multiple products by editing them in batch. Instructions for mass-editing of products are

provided in the section [Group product editing](#) of the chapter [Managing Existing Products](#).

### Non-taxable products

If your store is going to sell non-taxable products, you will need to adjust their details in such a way that no taxes will be applied.

For non-taxable products, the tax settings in the 'Product details' need to be adjusted like this:

1. Select **Yes** from the 'Tax exempt' drop-down box.
2. Select nothing from the 'Apply tax' field.
3. Click the **Save** button to apply the changes.

## 3.5.6 Examples of Configuring Taxes

### Example 1.

Suppose, your store is located in Texas, United States, and you need to impose a 8.25% sales tax on all orders delivered within Texas (The sales tax is not charged on deliveries made outside Texas). The tax needs to be calculated based on the discounted subtotal amount of orders before any shipping charges are applied.

To configure this tax, follow these steps:

1. Set up a destination zone for Texas (for example, name this zone "*Texas*"):
 

Countries:	United States
States:	United States: Texas
Counties:	--
Cities:	--
Zip/Postal codes:	--
Addresses:	--

2. Go to the 'Taxes' section of your store's 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 (Settings 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"/>	Credit Card Extra charge: <input type="text" value="0.00"/> \$ <input type="checkbox"/> Cash on delivery method	Visa, <u>Mastercard</u> , American Express	HTT	All Premium Wholesale	<input type="text" value="0"/>
<input checked="" type="checkbox"/>	Check Extra charge: <input type="text" value="0.00"/> \$ <input type="checkbox"/> Cash on delivery method	Check payment	HTT	All Premium Wholesale	<input type="text" value="0"/>
<input checked="" type="checkbox"/>	Gift Certificate		HTT	All Premium Wholesale	<input type="text" value="15"/>

Cash on delivery method

Traveler's Check

Extra charge:  \$

Cash on delivery method

US Funds Only

HTT|

All  
 Premium  
 Wholesale

and 'Payment gateways':

**Payment gateways**

Select the payment module to process customer credit cards

Payment gateways Select...  

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

### Payment gateways

Select the payment module to process customer credit cards

**Payment gateways**  [Add](#) 

Select the payment module to process customer credit cards in the Subscription module

**Subscription processor**  [Continue](#) 

The 'Payment methods' dialog box provides controls allowing you to configure, enable and disable payment methods. The 'Payment gateways' dialog box allows you to add payment methods to the list in the 'Payment methods' dialog box.

## Configuring and enabling payment methods

By default, displayed in the 'Payment methods' dialog box are the following methods:

- Credit card,
- Check,
- Gift certificate,
- Phone ordering,
- Fax ordering,
- Money order,
- C.O.D. (cash on delivery),
- Purchase order,
- Personal check,
- Business check,
- Wire transfer,
- Government check,
- Traveler's check.

All of these methods are *methods that require manual processing of payments* (Manual processing is that in which the store 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.

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 (Settings 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: 80%;" 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 Settings 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 Settings 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.

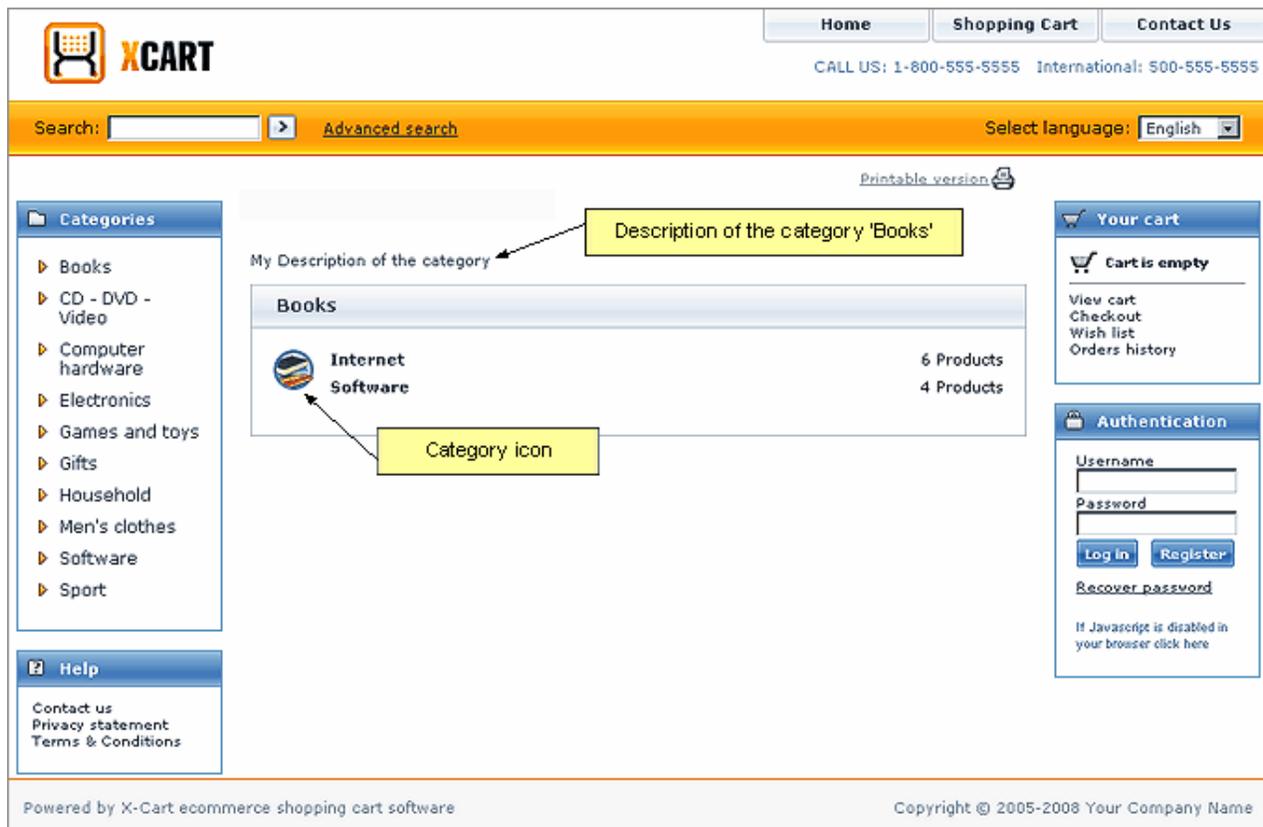
The screenshot displays the X-Cart v.4.3.0 user interface. At the top, there is a navigation bar with links for Home, Shopping Cart, and Contact Us, along with contact information: CALL US: 1-800-555-5555 International: 500-555-5555. Below this is a search bar and a language selection dropdown set to English. A yellow callout box points to the 'Categories' menu in the sidebar, which is displayed horizontally. The menu lists various categories such as Books, CD - DVD - Video, Computer hardware, Electronics, Games and toys, Gifts, Household, Men's clothes, Software, and Sport. 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 sidebar with 'Your cart' and 'Authentication' sections.

**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 platform 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 is located on the left, and a language selector is on the right, set to English. The main content area is titled 'My Description of the category' and shows the 'Books' category. A yellow callout box points to the subcategories 'Internet' (6 Products) and 'Software' (4 Products). 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. Below it is a 'Help' section with links for Contact us, Privacy statement, and Terms & Conditions. On the right, there is a 'Your cart' section indicating '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, along with a Recover password link. The footer contains the text '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:



Custom product categories can be created and managed through the 'Categories Management' section of the Admin area (Catalog 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 (Catalog 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 (Catalog 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', with three buttons: 'Modify category', 'Category products', and 'Delete category'. Below this is a section for 'Subcategories' containing a table with columns: POS., CATEGORY NAME, PRODUCTS\*, SUBCATEGORIES, and ENABLED. The table lists 'Internet' and 'Software' as subcategories. 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...'.

**Categories**

Root level > Books

Current category: "Books"

Modify category    Category products    Delete category

**Subcategories**

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

\*Note: The number in the PRODUCTS\* column includes all the subcategories in the category.

Update    Modify selected    Delete selected    Add new...

The name of the current category will be shown at the top of the 'Categories' form (*Current category: "Books"*). A list of the category's subcategories will be given below.

On any level except 'root', the top left-hand corner of the 'Categories' form will have a category level navigation bar. This bar will not only show the path to your current location, but will also allow you to return to any of the previously visited levels of the category tree with a single click.

### Categories

Root level > Books

Current category: "Books"

Category level navigation bar  
(Shows your current location and allows you to return to the previous levels of the category tree)

**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.

## 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 (Catalog 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 (Catalog 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 (Catalog 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 (Catalog 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 (Catalog 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.

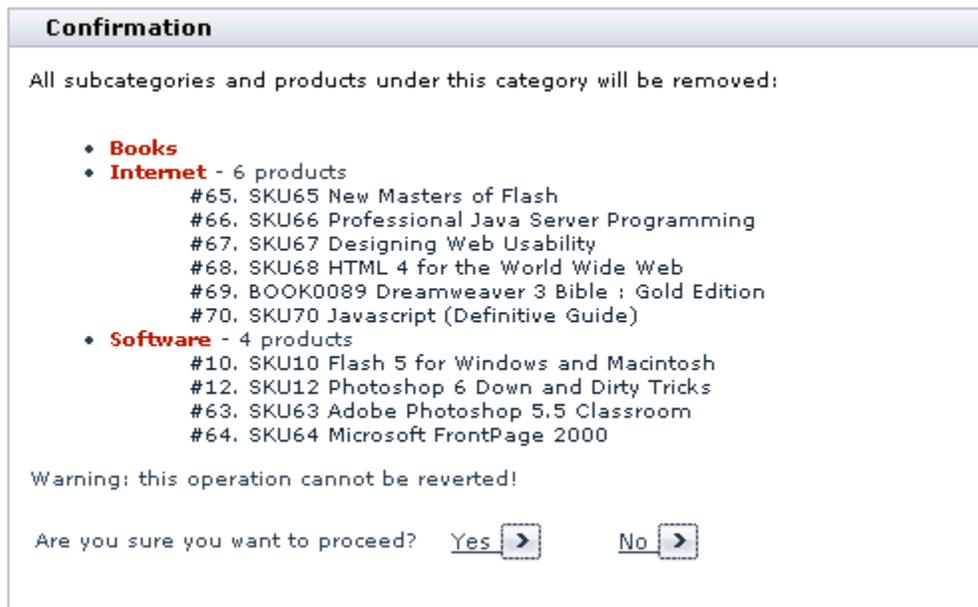
3. Do one of the following:

- 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 and title tag of this category will be used only for the subcategories and products, which do not have their own values of the corresponding fields.

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

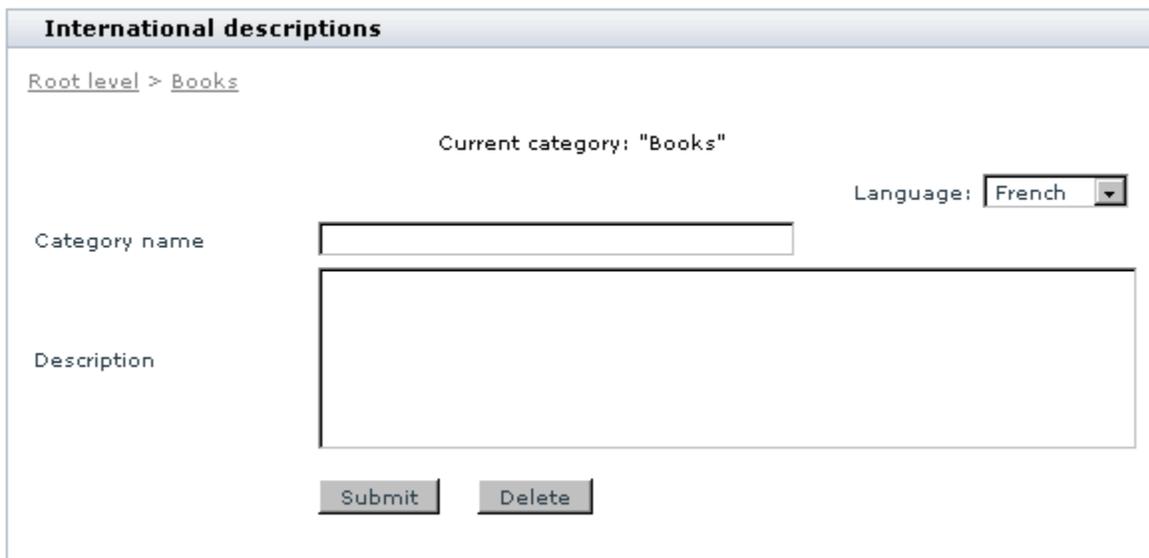
of their own will use the meta keywords of this category, whereas the subcategories and products which do not have a meta description of their own will use the meta description of this category. If this option is disabled, the subcategories and products of this category which do not have meta keywords 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'. There are two main input areas: 'Category name' with a single-line text box, and 'Description' with 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.

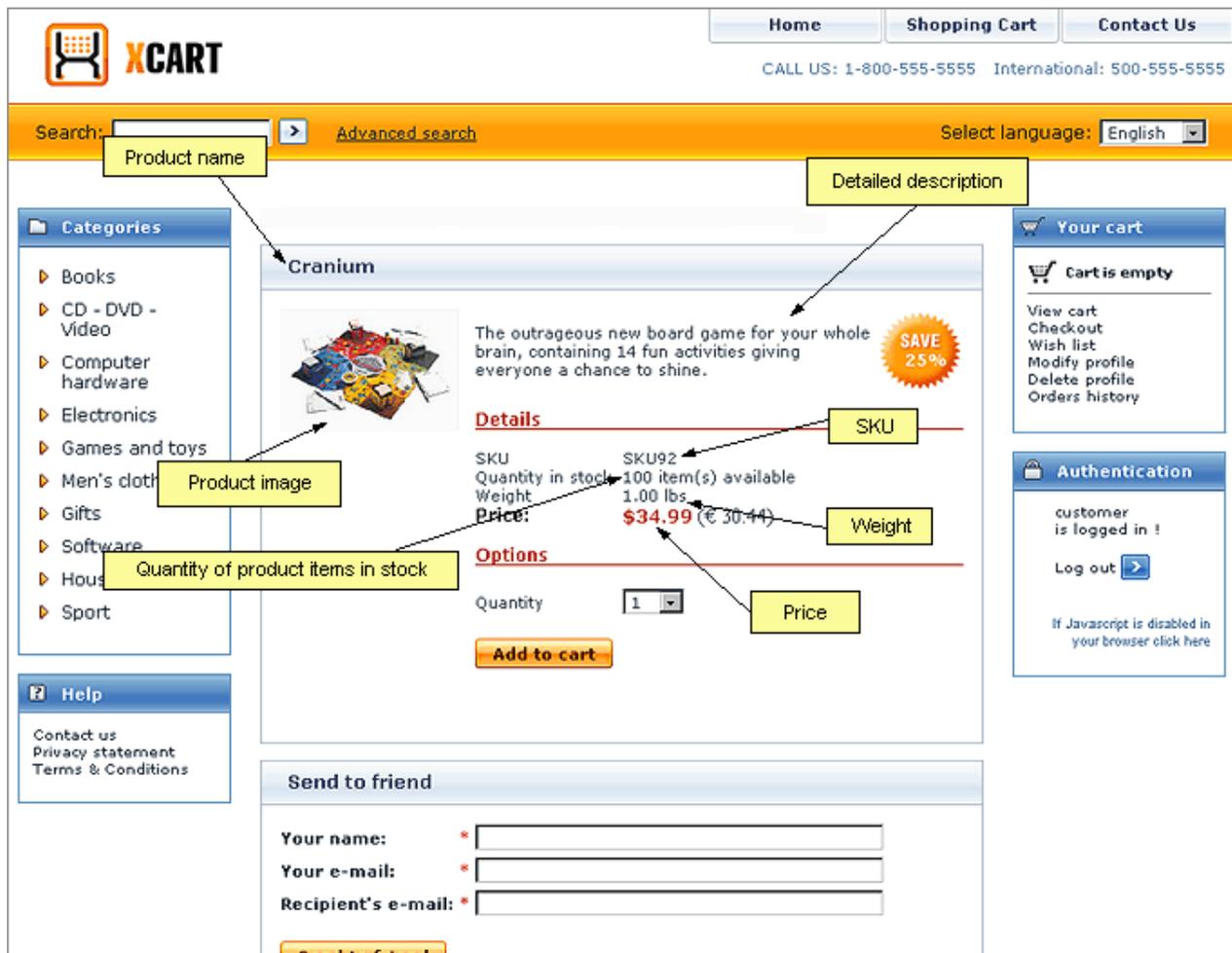
Your customers will be able to access this information by browsing through the product catalog or by viewing the results returned by a product search.

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 website 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 and an 'Advanced search' link. The main content area is titled 'Board games' and features a 'Sort by:' dropdown menu with options for 'Product', 'Price', and 'Default'. The product list includes two items: 'Cranium' and 'Lord of the Rings Board Game'. Each product entry shows a thumbnail image, a 'See details' link, a market price, an 'Our price' (discounted), a quantity selector, and a 'Buy Now' button. Annotations with yellow boxes and arrows point to specific elements: 'Thumbnail image' points to the product image in the list; 'Product image' points to the main product image for 'Cranium'; 'Short description' points to the text below the product image; 'List (Market) price' points to the 'Market price' text; and 'Price' points to the 'Our price' text. On the right side, there are two sidebars: 'Your cart' (showing 'Cart is empty') and 'Authentication' (showing 'customer is logged in' and a 'Log out' button). A 'Printable version' link is also visible in the top right corner.

'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 (Catalog 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 Catalog 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	<b>Cranium</b>	<input type="text" value="100"/>	<input type="text" value="34.99"/>
<input type="checkbox"/>	SKU182	<b>DUO</b>	<input type="text" value="100"/>	<input type="text" value="50.00"/>
<input type="checkbox"/>	SKU93	<b>Lord of the Rings Board Game</b>	<input type="text" value="80"/>	<input type="text" value="34.99"/>
<input type="checkbox"/>	SKU183	<b>MAESTRO</b>	<input type="text" value="100"/>	<input type="text" value="120.00"/>
<input type="checkbox"/>	SKU94	<b>Monopoly Junior</b>	<input type="text" value="100"/>	<input type="text" value="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

---

**Image:**

No image available

No image uploaded

Upload image

**Thumbnail:**



[Need help?](#)

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

Change thumbnail

---

Delete thumbnail

---

**Details**

**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.

**Search keywords:**

**Short description\* :**

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

---

**Apply global discounts**

Save

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

**Thumbnail:**

No image available

[Need help?](#)

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

To add a product image:

1. Click the **Upload image** button below the 'Image' area. A dialog box titled 'Image selection' appears.

#### Image selection

Select the source of an image below:

**File on this server**

**File on your local computer**

**WARNING!** The maximum file size that can be uploaded: 1046528b.

**File on the Internet (enter image URL)**

2. Use the 'Image selection' dialog box to select the desired image:

- If the file is located on the server, click the **Browse...** button to select the image filename and click

the **Apply** button.

**Note:** FTP must be configured correctly for you to be able to use this functionality.

- If the file is located on your local computer, click the **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.

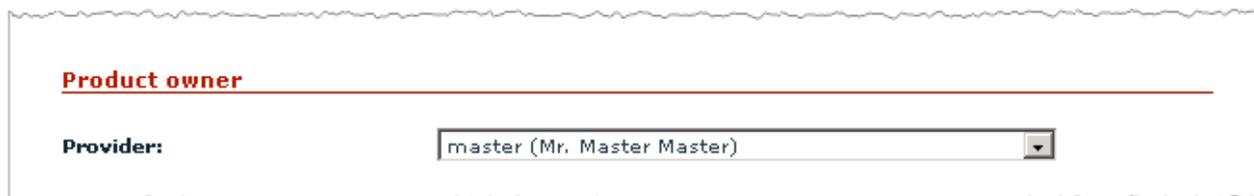
You may choose not add a thumbnail image for the product; in this case, the default 'No image available' image will be displayed in the place of the product's thumbnail.

**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:** rmaster (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:

<b>SKU:</b>	<input type="text"/>
<b>Product name:</b>	<input type="text"/>
<b>Clean URL:</b>	<input type="text"/>
	<a href="#">What is Clean URL?</a> <b>Note:</b> The Clean URLs functionality is now disabled. You can enable it through the <a href="#">General settings-&gt;SEO options</a> section.
	<b>Note:</b> 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 <a href="#">General settings-&gt;SEO options</a> section).
<b>Search keywords:</b>	<input type="text"/>
	<a href="#">Default editor</a> <a href="#">WYSIWYG editor</a>
<b>Short description* :</b>	<input type="text"/>
	<a href="#">Default editor</a> <a href="#">WYSIWYG editor</a>
<b>Detailed description* :</b>	<input type="text"/>

- **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 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 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 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:

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

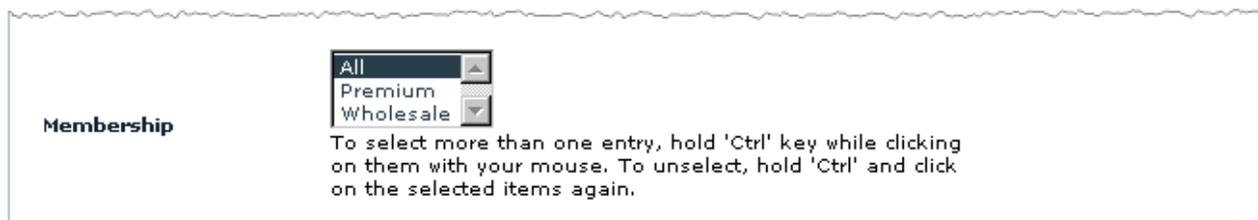
- **Ship in a separate box:** This option allows you to specify whether you wish this product to be shipped separately from any other products ordered in the same order.

**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.

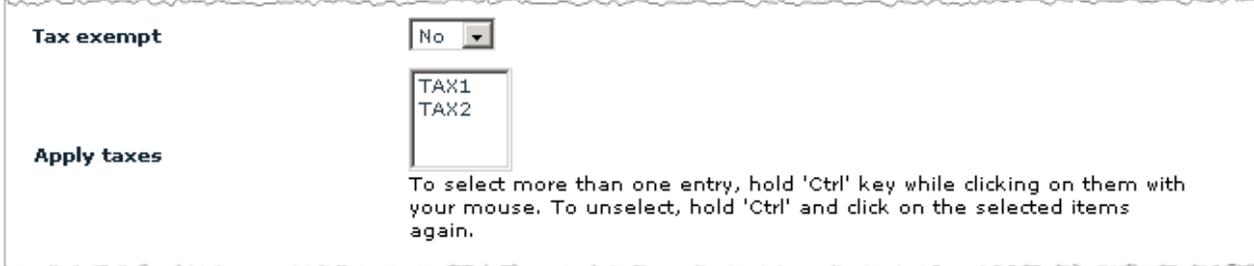
Portion 6:



- **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 section of a web interface with two main fields. The first field is labeled "Tax exempt" and contains a dropdown menu with "No" selected. The second field is labeled "Apply taxes" and contains a list box with "TAX1" and "TAX2" items. Below the list box, there is a small text instruction: "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 single checkbox field labeled "Apply global discounts" which is checked.

- 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 shows the X-Cart customer area main page. 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 on the left lists various product categories such as Books, CD - DVD - Video, Computer hardware, Electronics, Games and toys, Men's clothes, Gifts, Software, Household, and Sport.
- My Description of the category:** A section for 'Books' showing sub-categories like 'Internet' (6 Products) and 'Software' (4 Products).
- Featured products:** A section for 'Books' featuring a product titled 'Photoshop 6 Down and Dirty Tricks' (SKU: SKU12). The product description states: 'This is one of the very best books I've seen to date on Photoshop Tricks. Do yourself a favor and add this powerhouse to your Photoshop arsenal.' The market price is \$79.99, and the current price is \$59.99 (€ 52.19), representing a 25% discount. A 'Buy Now' button is present.
- Your cart:** A section on the right indicating that the cart is empty, with links for 'View cart', 'Checkout', 'Wish list', and 'Orders history'.
- Authentication:** A section for user login and registration, including fields for 'Username' and 'Password', and buttons for 'Log in' and 'Register'. A 'Recover password' link is also provided.

A yellow callout box points to the 'Featured products' section with the text: 'Featured products of the category "Books"'. A 'Printable version' link is also visible in the top right corner of the main content area.

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 (Catalog 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 (Catalog 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, readjust the position numbers for the products in the list.

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

Buttons: Delete selected, Update

**Add product**

Text input:  Browse...

Position:

Active:

Buttons: Add new

4. 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:

1. Go to the 'Categories Management' section of the Admin area (Catalog 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 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 (Catalog 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 (Catalog 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.
- See the section [Using the quick search form](#) for information on how to use the quick search functionality.

## 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.

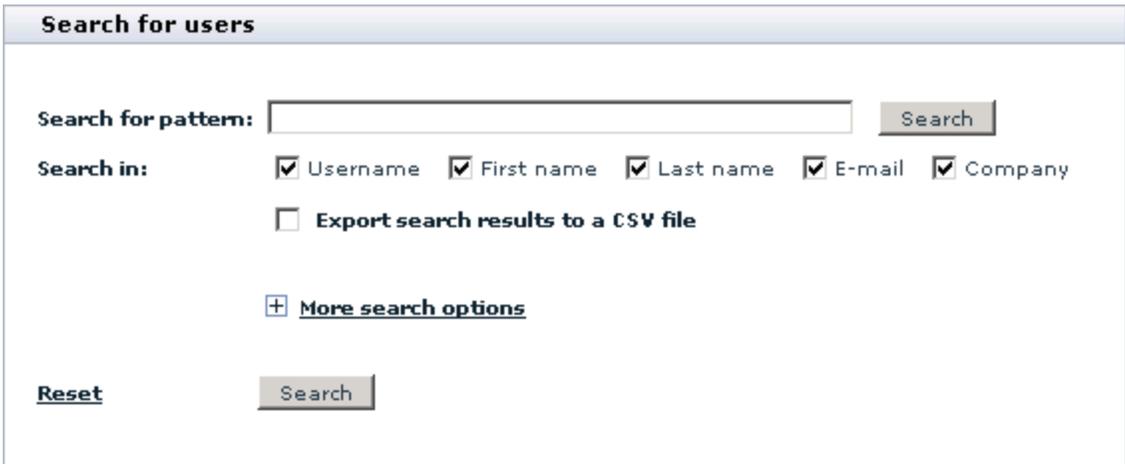
## 5.1.2 Managing User Profiles

### 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, email 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', 'email' 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>Orders count:</b>	<input type="text"/> - <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"/> <a href="#">Suspended automatically</a>
<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="June"/> <input type="text" value="05"/> <input type="text" value="2009"/> Through <input type="text" value="June"/> <input type="text" value="05"/> <input type="text" value="2009"/>

**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 / Email	Usertype	Last logged in	Orders counter
<input checked="" type="checkbox"/>	<a href="#">admin</a>	<b>Admin Admin</b> / admin@example.com	Administrator	24-11-2008 15:40:54	0
<input type="checkbox"/>	<a href="#">provider</a>	<b>Provider Provider</b> / provider@example.com	Provider	21-11-2008 15:52:26	0
<input type="checkbox"/>	<a href="#">customer</a>	<b>John Smith</b> / customer@example.com	Customer	21-11-2003 10:31:12	<a href="#">2</a>

**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 number of orders made.

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 Settings 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  
*Shipping Address:*  
Test address,  
Test city,  
WI (Wisconsin) 54821,  
United States  
*Billing Address:*  
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, email, 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. If the check box is left empty, the following data, entered by this provider, will be validated to exclude the possibility of an XSS attack:
  - product descriptions (including international descriptions);
  - extra fields values.

When a suspicious description is detected, the data is not saved in the database, and the provider is redirected to the 'modify product' page with a warning. The name of the field which did not pass the validation is specified (just like in case of an attempt to create a product with an empty description).

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 administrator, and the option 'Allow this provider to use active content on product pages' is disabled (the provider becomes untrusted), the product descriptions in the Customer area and extra fields values will be filtered. 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.

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 (Management 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 (Management 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 (Management 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. Click on Search for orders in the Management 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):

<b>Order id:</b>	<input type="text"/> - <input type="text"/>
<b>Order total (\$):</b>	<input type="text" value="0.00"/> - <input type="text"/>
<b>Payment method:</b>	<input type="text"/>
<b>Delivery method:</b>	<input type="text"/>
<b>Order status:</b>	<input type="text"/>
<b>Provider:</b>	<input type="text"/>
<b>Order features:</b>	<input type="checkbox"/> Entirely or partially paid by gift certificate <input type="checkbox"/> Global discount applied <input type="checkbox"/> Discount coupon applied <input type="checkbox"/> Free shipping <input type="checkbox"/> Tax exempt <input type="checkbox"/> Gift certificates purchased <input type="checkbox"/> Orders that have notes assigned <p>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.</p>
<b>Search for pattern:</b>	<input type="text"/>
<b>Search in:</b>	<input checked="" type="checkbox"/> Product title <input checked="" type="checkbox"/> Options
<b>SKU:</b>	<input type="text"/>
<b>Product ID#:</b>	<input type="text"/>
<b>Price (\$):</b>	<input type="text" value="0.00"/> - <input type="text"/>
<b>Customer:</b>	<input type="text"/>
<b>Search in:</b>	<input checked="" type="checkbox"/> Username <input checked="" type="checkbox"/> First name <input checked="" type="checkbox"/> Last name
<b>Company:</b>	<input type="text"/>
<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>Email:</b>	<input type="text"/>
<b>One-time/multiple customer:</b>	<input checked="" type="radio"/> All <input type="radio"/> One-time customer <input type="radio"/> Return customer
	<a href="#">Reset filter</a> <input type="button" value="Search"/>

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.
  - 'email' - Customer's email address.
  - One-time/multiple customer - select from *All, One-time customer* and *Return customer*.
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](#)

	#	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) <span style="color: red;">deleted</span>	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) <span style="color: red;">deleted</span>	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. Click on Search for orders in the Management 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 Search for 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 (Management 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.

**Edit purchase discounts**

Check all / Uncheck all

	ORDER SUBTOTAL	DISCOUNT	DISCOUNT TYPE	MEMBERSHIP
<input type="checkbox"/>	<input type="text" value="1000.00"/>	<input type="text" value="5.00"/>	<input type="text" value="Percent, %"/>	<input type="text" value="All"/> Premium Wholesale

Delete selected    Update

---

**Add new discount**

<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="Percent, %"/>	<input type="text" value="All"/> Premium Wholesale
-----------------------------------	-----------------------------------	---	--

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 (Management 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 (Management 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](#)).

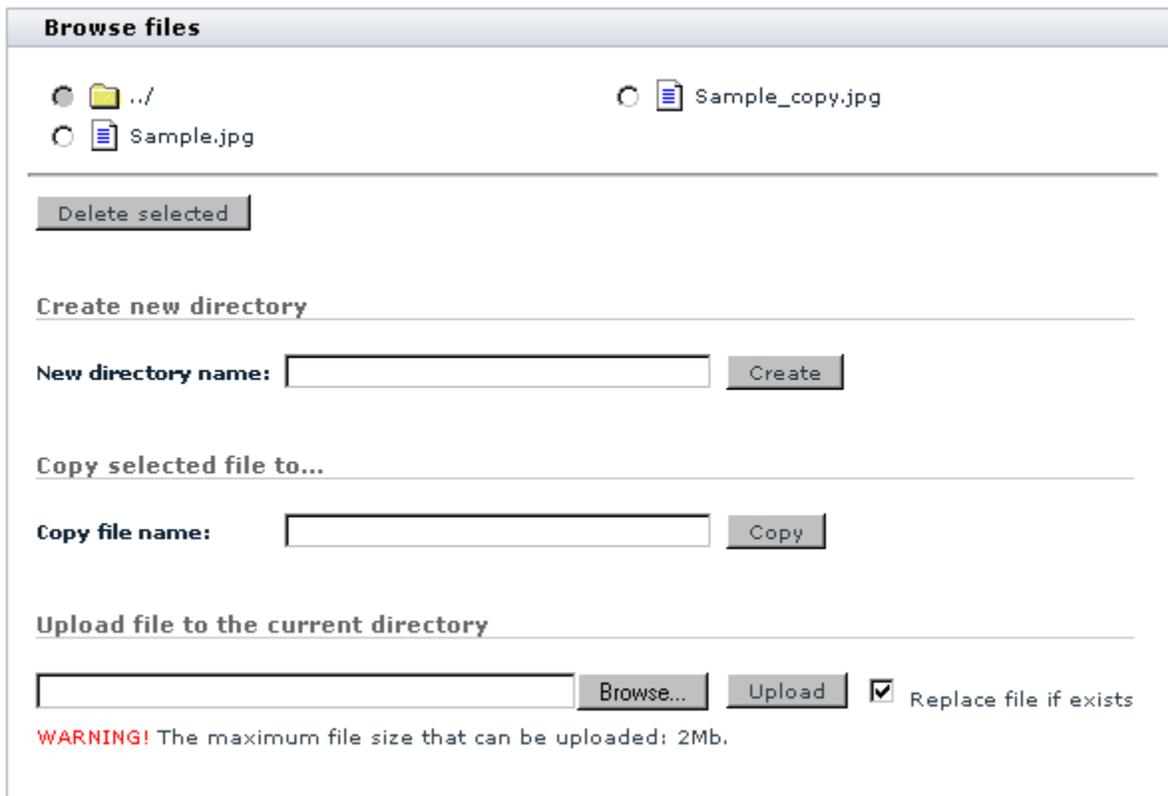
## 5.5.1 Viewing the Contents of the Files Repository

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: click on Files in the Management menu.

You should see a dialog box titled 'Browse files'.



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 4.3.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 v4.3.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: click the link Import/Export in the Management 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: click the link Import/Export in the Management 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.

## 5.8 Using the quick search form

The Quick Search form enables you to search for products, users and orders. To open it on any page of X-Cart admin area press Ctrl + "" (grave accent) or click the [Quick search](#) link at the top of the page. The search form opens.



Search keywords

Search

[How it works](#)

To find an item, simply enter keyword(s) into the text box and click the **Search** button.

The search is performed in:

- product ID, product name and SKU number;

- username, first name and last name;
- order ID.

**Note:** An admin with 'Fulfillment staff' membership is not allowed to search for products and users.

To fine-tune the search results you may wish to force the system to search among products, users or orders only. To restrain the search, put the following keys before the search query:

- u [keyword(s)] to search only among users;
- p [keyword(s)] to search only among products;
- o [keyword(s)] to search only among orders.

For example, to find a user with the last name "Smith", put into the search form the following line:

u Smith



# 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 value

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 4.3, 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 4.2.2.

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 4.2.2 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.

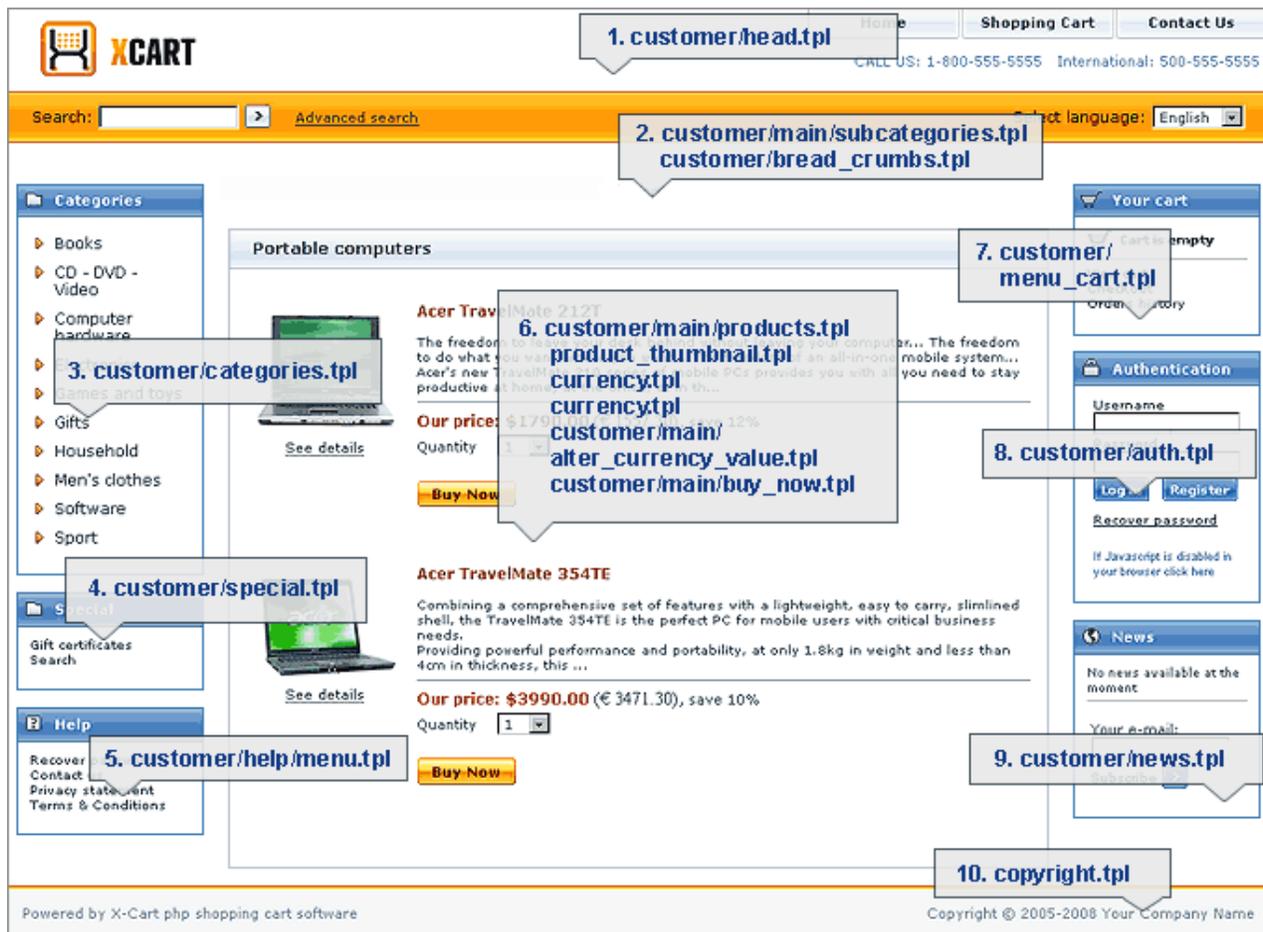
2. After you copy the skin files to the directory 'skin1/', set the permissions of every subdirectory and file inside the directory 'skin1/' to 777 (write, read and execute for everybody).
3. To see the changes, clear the contents of the directory `<xcart_root>/var/templates_c` which contains previously 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 area 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 (Management 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 emails.
- `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*

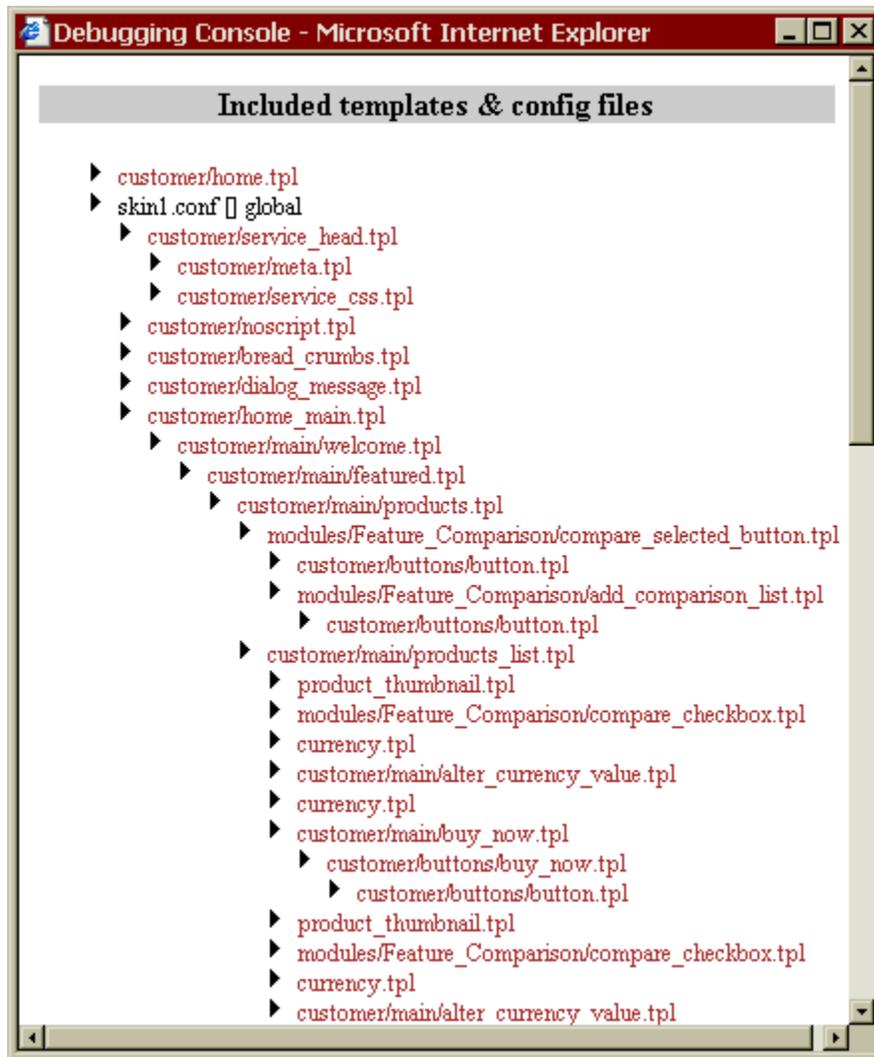
- skin1/modules/Survey/main.css - Main CSS file for the Customer area, X-Survey add-on.

## 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}";

```

If you wish to preview this template save the file and click on the button below.

Use default stylesheet for template 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.

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](#)).

## 8.2.6 Replacing X-Cart's Logo

One of the most popular and necessary tasks about the skins is to replace the default company logo on the Customer area with a real logo of your company/store. Before you start replacing the logo, ensure that the skin is installed correctly and you have an appropriate image file for your company logo. The recommendations for the image files are listed in the table below.

The name of the image file with your company logo can either coincide with the filename of the default logo or have a different name. If both the default logo and your company logo have the same filename, you only need to replace the default image file with your image file. If these files have different names, you need to edit the template which controls the storefront header. The exact filename of the default company logo depends on the skin that you use.

Skin Name	Default Logo Path and Filename*	File Format	Logo Size
Light & Lucid	/xlogo.gif	GIF	244 x 67 px
Artistic Tunes	/custom/company_logo.gif	GIF	190 x 27 px
Fashion Mosaic	/fashion_mosaic/company_logo.gif	GIF	228 x 50 px
Neon Lights	/neon_lights/xlogo.gif	GIF	205 x 26 px
Vivid Dreams	/vivid_dreams/logo.gif	GIF	275 61 px

\* - a path relative to the main X-Cart's image directory <xcart\_dir>/skin1/images.

To replace the logo:

*If the filename of your company logo is the **same** as the filename of the default logo.*

1. Log in to the Admin area and go to the Edit templates section (Administration menu -> Edit templates).
2. Use the Browse templates form to locate the folder with the default logo file (see the table).

For example, if you are replacing the logo of the Artistic Tunes skin, in the Browse templates form first move to the folder images/ and then move to the folder custom/. In the same manner, for the Fashion Mosaic skin first move to folder images/ and then move to folder fashion\_mosaic/, etc.

3. Find section Upload file to the current directory at the bottom of the form and click the Browse button to open a file upload dialog window.
4. Locate the image file with your company logo and choose it for the upload.
5. Make sure the Replace file if exists check box is selected.
6. Click the Upload button to upload the file to the current directory.

Now the logo on the Customer area is replaced with your company logo.  
IMPORTANT! To see the changes you may need to clear your browser cache.

*If the filename of your company logo is **different** to the filename of the default logo.*

1. Log in to the Admin area and go to the Edit templates section (Administration menu -> Edit templates).
2. Use the Browse templates form to locate the folder where you want to keep the file with logo. It can be either the directory with the default logo file (see the table) or any other location inside the images/ directory.
3. After you choose where to keep your company logo, find section Upload file to the current directory at the bottom of the form and click the Browse button to open a file upload dialog window.
4. Locate the image file with your company logo and choose it for the upload.
5. Click the Upload button to upload the file to the current directory.
6. Click on the Edit templates breadcrumbs link at the top of the page to go back to the root skin directory skin1/.
7. In the Browse templates form go to the folder customer and click on the head.tpl link to open the respective file for editing.
8. In the Edit file form, find the following code:

```
<div class="logo">  
<a href="{ $catalogs.customer } /home.php" >
```

```

</a></div>
```

and replace the LOGO\_PATH\_AND\_FILENAME part with the the relative path to the directory where your company logo is located and the logo filename. For example, if the image file with the logo is located in the directory <xcart\_dir>/skin1/images/custom and its name is custom\_logo.gif, the LOGO\_PATH\_AND\_FILENAME part must be replaced with /custom/custom\_logo.gif.

9. Click the Save button for the changes to take effect.

Now the logo on the Customer area is replaced with your company logo.

IMPORTANT! To see the changes you may need to clear your browser cache.

## 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

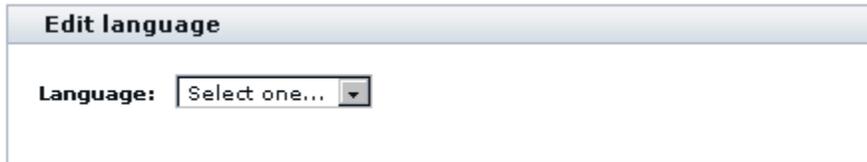
X-Cart's 'Languages' section allows you to edit the values of existing language variables, add new language variables and delete the language variables that you do not need in your store.

#### 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;
- email - 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) 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**.

**Management**

- This month's orders
- Search for orders
- Returns
- Statistics
- Edit ratings
- Surveys
- Users
- Membership levels
- Titles
- Gift certificates
- Wish lists
- Files
- News management
- Import/Export

**Catalog**

- Categories
- Manufacturers
- Add new product
- Products
- Product classes

**Settings**

- General settings
- Payment methods
- Credit card types
- Countries

[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.
6. To add block-level contents to a text label (div, table) under Internet Explorer browser, use the [Languages](#) page. If such contents is added in Webmaster mode, it might be handled incorrectly.

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

- This month's orders
- Search for orders
- Returns
- Statistics
- Edit ratings
- Surveys
- Users
- Membership levels
- Titles
- Gift certificates
- Wish lists
- Files
- News management
- Import/Export

📁 Catalog

- Categories
- Manufacturers
- Add new product
- Products
- Product classes

📁 Settings

- General settings
- Payment methods
- Credit card types
- Countries
- States
- Taxes
- Shipping options
- Shipping 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).

#### 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.
6. To add block-level contents to a text label (div, table) under Internet Explorer browser, use the [Languages](#) page. If such contents is added in Webmaster mode, it might be handled incorrectly.

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.

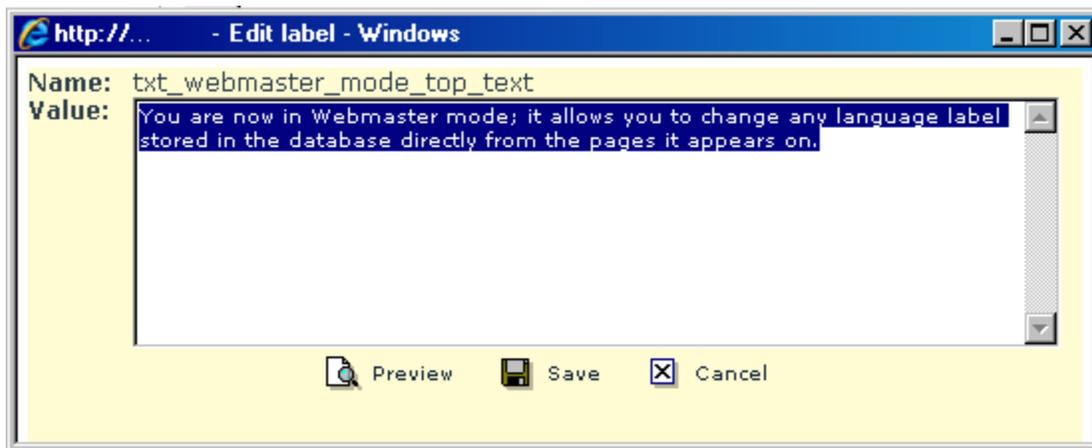
4. Do one of the following:
  - (*If the text element is a non-clickable piece of text*) Click on the text element once with the right

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:

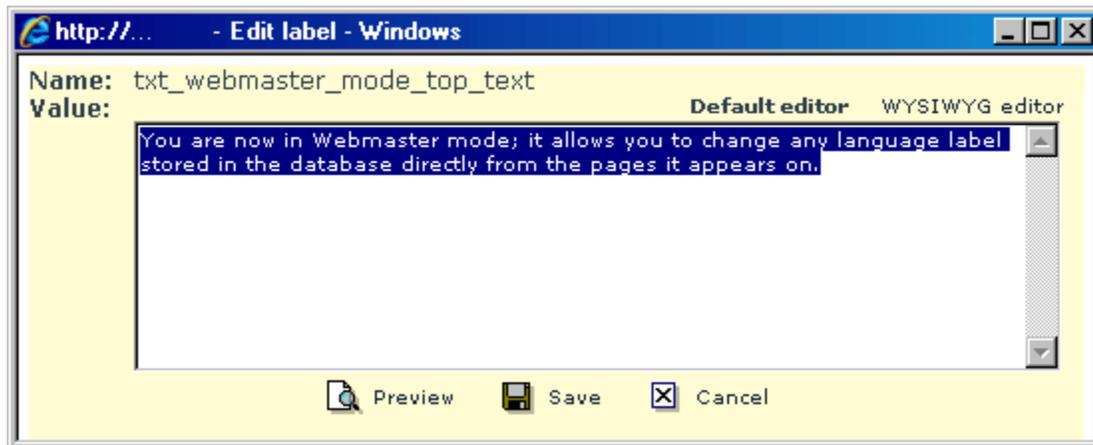


4. Edit the language variable value displayed in the 'Edit label' pop-up window and save the changes. For information on the 'Edit label' pop-up window, see the section [The 'Edit label' pop-up](#) below.

### 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 your customers come from different countries, or you do business in a multilingual country, having your online store available in several languages will be rather advantageous to your business. X-Cart enables you to build a true multilingual store and translate the store to as many languages as you wish. You can apply several languages to all store interfaces (Customer, Admin, Provider and Partner areas) and different kind of store data, including product and category descriptions, manufacturer pages, static content, etc.

When a store has more than one language, store users can switch between languages using a special selector. For the Customer area the selector can be either a drop-down box, a single-line box with text or a single-line box with language icons (defined by the store administrator in the General settings/ Appearance options section); for the Admin, Provider and Partner areas the selector is available as a simple drop-down box only. A selector contains a list of all the languages that are currently installed and activated in the store.



Language selector in Customer area



Language selector in Admin, Provider and Partner areas

After a user has switched a language, the text of the current interface will automatically change to the selected language until the current user session expires. When the user starts a new session, the language will be switched back to the store's default language, which is set up by the store administrator.

At the moment X-Cart is delivered with the English language pack only. To add a new language you need to either import a tailored language pack or translate all the language variables on your own. As a rule, translation does not cause any technical difficulties, but it may take time and effort. To translate X-Cart into

a different language, first you need to create a copy of an existing language and then either translate its variables directly in the Admin area or export the variables in a CSV file and edit the file with any suitable facility, including a spreadsheet editor like Microsoft Office Excel or OpenOffice.org Calc.

A tailored language pack is a CSV file with translated language variables. Language packs are prepared and distributed by independent third-party developers and dedicated X-Cart community members who have already translated their stores to other languages and who are ready to share or trade language packs they have. A place on the Internet where you can find a tailored language pack for your store is the X-Cart Community Forums at <http://forum.x-cart.com/>.

For detailed instructions on how to perform tasks related to managing languages in a store study the following sections of the manual:

- [Adding Languages;](#)
- [Setting Default Store Languages;](#)
- [Exporting Languages;](#)
- [Disabling languages;](#)
- [Deleting Languages.](#)

## 8.4.1 Adding Languages

### Overview

Technically, adding a language to a store means that you create a new language either by cloning an installed language or by importing a tailored language pack, a CSV file with translated language variables.

When you create a new language without importing a tailored pack, the variables for the new language are taken from the default language for the Customer area. If some of the variables are broken or missing, X-Cart takes their values from the default language for the Admin area. If unsuccessful, the variables get the values of the English language pack. When you create a new language by importing a tailored language pack, the variables for the new language consecutively take their values from the default languages for the Customer and Admin areas, and from the English language pack. Finally, the existing variables get replaced with the values from the language pack that you import. This way of importing languages ensures that the new language will not have empty or broken variables if there were any in the language pack that you imported. For example, this may become an issue if you import a language pack for an earlier X-Cart version.

## Adding a language

To add a language:

1. In the Admin area, go to the Edit languages section (Administration -> Languages) and scroll down to the Add/Update language 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.: /u/user/public\_html/xcart/files  
  
**Note:** the fields in the file being imported must be in the following order: Name, Value, Description, Topic

2. In the drop-down box **Choose a language**, select the name of the language that you want to add.
3. If you are importing a tailored language pack, specify the delimiter type and the location of the import file.
  - a) In the drop-down box **CSV delimiter**, select the type of delimiter you used when preparing the import CSV file;
  - b) Specify the filename and the location of the import file.
    - If the file is located somewhere on the server, select *Server* as the source of the import file and enter in the CSV file is located on the server field an absolute path to the file;
    - 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.
4. Click the **Add/Update language** button.

After you have clicked on **Add/Update language**, the new language will be added to the store. X-Cart will display the Edit language box, which you can use to disable/enable the language, change the language charset and the language icon. If you edit any of the language options, remember to click the **Apply** button for changes to take effect.

### Edit language

Language:

CSV delimiter:

---

#### Language options

Charset:

Language icon: 

Below the Edit language box X-Cart will display another box Edit language entries, which you can use to edit some of the variables of the selected language.

**Edit language entries**

**Topic: Countries**

**country\_AD** [WYSIWYG editor](#)

Andorra

**country\_AE** [WYSIWYG editor](#)

Vereinigte Arabische Emirate

**country\_AF** [WYSIWYG editor](#)

Afghanistan

## 8.4.2 Setting Default Store Languages

When a store uses several languages, you should specify which languages should be used as default languages for the customer and administrator interfaces. A default language means a language in which a user interface must appear when a user first opens a particular interface (Customer, Admin, Provider or Partner area). Customer interfaces include the Customer area and the Partner area; administrator interfaces include the Admin area and the Provider area.

For registered users, X-Cart can remember what language they selected, and when a registered user logs in to the personal account, X-Cart automatically switches to the user's language, not to the default language. For anonymous users, X-Cart does not keep information about a preferred user language, and anonymous users need to switch to their language each time they visit your store.

To set a default language for the customer and administrator interfaces:

1. In the Admin area, go to the Edit languages section (Administration menu -> Languages).

2. Select the language you want to use as default from the **Default customer language** and **Default admin language** drop-down selectors in the Edit language box.

- A *default customer language* means a default language for the Customer and Partner areas.
- A *default admin language* means a default language for the Admin and Provider areas.

**Default languages**  
**Default customer language:**   
**Default admin language:**

3. Click the **Update** button to apply the changes.

### 8.4.3 Exporting Languages

To export a language:

1. In the Admin area, go to the Edit languages section (Administration menu -> Languages).
2. Select the language you want to export from the **Language** drop-down selector in the Edit language box.

**Edit language**  
**Language:**

After you have selected the language, the page will automatically refresh expanding the Edit language box, which now contains several options and controls.

### Edit language

Language:

CSV delimiter:

---

#### Language options

Charset:

Language icon: 

3. Select a type of a delimiter for the export file from the **CSV delimiter** drop-down box selector.
4. Click the **Export** button.

After you have clicked on **Export**, a dialog window appears. In the dialog window select to save the CSV file. If prompted, choose a location where the CSV file should be saved to.

## 8.4.4 Disabling Languages

If you do not use some of the store languages any longer, you can disable them so that your store users could not select and use these languages. The option is a recommended one as opposed to deleting languages, because you will be able to easily re-enable the disabled languages if needed.

**Important:** X-Cart requires that at least one language must be enabled. Also you will not be allowed to disable a language if there is only one language available in the store.

To disable a language:

1. In the Admin area, go to the Edit languages section (Administration menu -> Languages).
2. Select the language you want to disable from the **Language** drop-down selector in the Edit language box.

**Edit language**  
  
Language:

After you have selected the language, the page will automatically refresh expanding the Edit language box, which now contains several options and controls.

**Edit language**  
  
Language:     
  
CSV delimiter:    
  
**Language options**

---

  
Charset:   
  
Language icon: 

3. Click the **Disable** button.

After you have clicked on **Disable**, X-Cart will reload the page, and the **Disable** button will turn to the button **Enable**, which you should use to enable the disabled language if needed.

### Edit language

Language:

CSV delimiter:

---

#### Language options

Charset:



Language icon:

## 8.4.5 Deleting Languages

For some reason you may need to delete one of the store languages. It is recommended that you never delete the English language pack that is delivered with X-Cart. And if you do not need to use the English language in your store, simply disable it according to the instructions in the [Disabling Languages](#) section of this manual. Whichever language you delete, it is recommended that you first export the language pack for this language so that you could restore the language if needed. For instructions on how to export a language, refer to the [Exporting Languages](#) section of this manual.

**Important:** X-Cart requires that at least one language must be installed. Also you will not be allowed to delete a language if there is only one language available in the store.

To delete a language:

1. In the Admin area, go to the Edit languages section (Administration menu -> Languages).
2. Select the language you want to delete from the **Language** drop-down selector in the Edit language box.

### Edit language

Language:

After you have selected the language, the page will automatically refresh expanding the Edit language box, which now contains several options and controls.

**Edit language**

Language:

CSV delimiter:

---

**Language options**

Charset:

Language icon: 

3. Click the **Delete** button and confirm your action when prompted.

After you have clicked on **Delete**, X-Cart will display a confirmation message saying that the language has been deleted successfully.

## 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			
<b>Embedded level</b>			
POS.	PAGE TITLE	SHOW LINK	STATUS
No embedded pages defined			
<input type="button" value="Add new..."/>			
<b>Root level</b>			
POS.	PAGE TITLE	SHOW LINK	STATUS
No root pages defined			
<input type="button" value="Add new..."/>			
<input type="button" value="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:** \*

**Page 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.

**Page content:** \* [Default editor](#) [WYSIWYG editor](#)

Page1 content

**META keywords:**

**META description:**

**Status:** \*

**Position:**

**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**

<input type="checkbox"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text" value="http://example.com/xcart_store/contactu"/>	<input checked="" type="checkbox"/>
--------------------------	--	--	-------------------------------------

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.

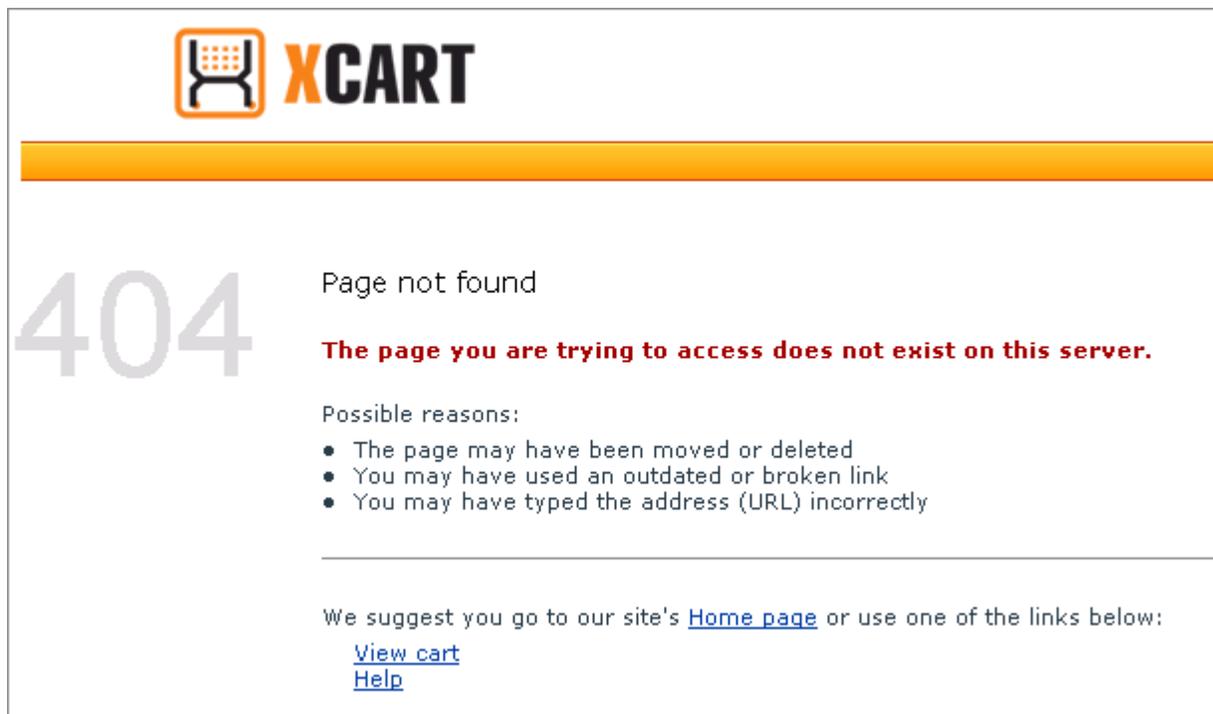
To delete one or more links from the speed bar:

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](#)
- [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 Settings 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 email 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. To speed up your store, ensure that your images are in the file system, not in the database.

When you choose to store image in the file system, all images are stored in the /images directory. Each type of images (product images, thumbnails, category icons, etc.) is stored in a separate subdirectory in the /images directory (called T, D, etc. - according to the type of images). Make sure you do not rename the /images directory and its subdirectories, because otherwise X-Cart will not be able to see the images. Also do not move your images to other directories.

- 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.

**Note:** If you select this option, keep in mind that in this case you will not be able to replace your images by simply uploading other ones via FTP, as the digital signature of the new image will not match the one stored in the database for this image.

- 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 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.

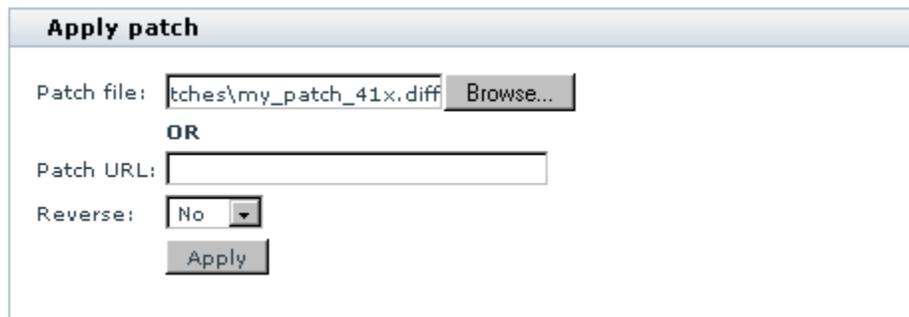
## 9.7.1 Applying File Patches

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 elements:

- A "Patch file:" label followed by a text input field containing "tches\my\_patch\_41x.diff" and a "Browse..." button.
- An "OR" separator.
- A "Patch URL:" label followed by an empty text input field.
- A "Reverse:" label 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_centri.php ... OK
payment/cc_chargeit.php ... OK
payment/cc_delta.php ... OK
payment/cc_edinar.php ... OK
payment/cc_egateway.php ... OK
```

Patch results show what files the patch was successfully applied to, and what files failed to be patched. You can see patch log for details.

The following problems may arise:

**checksum error** - patch contents is corrupted;

**non-writable** - writable permission has not been given to the file, please give it writable permission;

**not a file** - the target is not a file;

**not exists** - the necessary file is missing;

**could not patch** - the patch cannot be applied to this file automatically, because it has been significantly modified, the patch should be applied to this file manually

When the patch has been successfully applied, click on **Finish** to get back to the 'Patch/Upgrade center' page.

**Note:** Do not forget to change permissions for the patched files.

### To apply a patch by issuing the command 'patch':

1. Save the text of your patch to a file (e.g. patch.diff).
2. Copy this file (patch.diff) to the directory where X-Cart is installed.
3. Issue the command 'patch -C < patch.diff' to check the patch applicability.
4. If there are no errors during the check-up, apply the patch by issuing the command 'patch < patch.diff'.

You can read more about 'patch' command in the manual (man patch, info patch).

### To apply a patch manually:

If a patch application failed in the first two ways (this may be caused by redundant spaces or conversion problems) you can try to apply the patch manually.

1. Open the file after 'Index:' (admin/category\_modify.php) in the text editor;

Diff files are divided into parts ("hunks"). Each "hunk" starts with a line like this:

```
@@ -160,7 +160,7 @@
```

where:

160 - indicates the number of the line of the code where the changes start

7 - indicates the number of the lines in the hunk before patch applying

7 - indicates the number of the lines in the hunk after patch applying

2. Edit the file (admin/category\_modify.php). Find the line, which is marked by "-" in the text of patch and remove it.
3. Insert the line marked by "+" in the text of patch.

If you cannot apply the patch in these ways it means the file that needs to be patched has been modified or this file is from another version of X-Cart and cannot be patched by this patch. Ask technical support to help

you.

## 9.7.2 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:

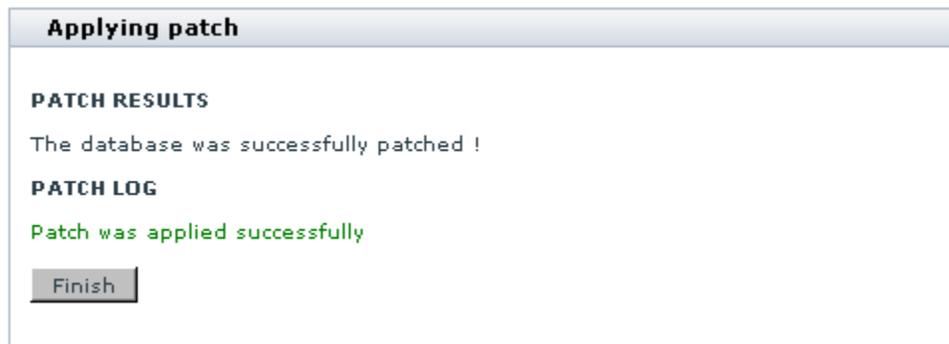
**OR**

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.



If no errors occurred, click on **Finish**.

## 9.8 Backup and Restore Procedures

Backup generally refers to making a copy of a store, which can then be restored fast and easily, if need be. Regular data backup will help you prevent serious data loss and corruption that can follow a disaster or mishandling of your store. The rule here is to create a full backup copy of the store at regular intervals and before carrying out any tasks that may interfere with the software code and behavior, including software and hardware upgrades, custom programming, adjusting the store design, etc. At that, you should not rely on your hosting provider only, who is likely to include regular data backup into their hosting plan: In case of emergency, data cannot always be restored immediately while any possible delay can seriously affect your business. Another typical example of when you may need to back up your store is moving/copying the store to another host or directory. In such a situation, if a backup is available, you will be able to deploy a fully functioning copy of the store in a new location quickly.

When you create a backup copy of a store you need to carry out a number of typical steps and procedures, which include making a database dump and creating an archive with the X-Cart code, templates and related files (images, static pages, the HTML catalog, files in the folder `file/`, etc.). In fact, X-Cart does not impose any restrictions on what tools you use to create a backup copy of your store - you can use any convenient facility, including *SSH*, *FTP*, *phpMyAdmin*, *Remote Desktop*, utilities that go with your *hosting control panel* and other available facilities. The exact set may vary depending on the operating system you use.

When you restore the store from a backup copy, it is supposed that you use the same tools and facilities to carry out inverse operations: restoring the store files from the archive and restoring the database content from the MySQL dump. In case you are restoring the store to a different location, in addition to this you will need to adjust some configuration settings.

For detailed instructions on how to handle store backups and carry out specific tasks, please refer to the following sections later in this chapter:

- [Backing up the Store](#)
- [Restoring the Store from a Backup](#)
- [Safety Tips](#)
- [Troubleshooting](#)
- [Getting Help](#).

Remember that making a backup copy of a store and restoring the store from the backup are rather complicated tasks, which may become associated with a series of difficulties or even involve unpredictable effects. This document only provides a general description of the backup and restore procedures, and it does not intend to cover all types of situations that can occur while you back up or restore your store.

If you experience any difficulties in handling your store backups and you cannot find the answer in this document, you are welcome to address the alternative sources and services.

## 9.8.1 Backing up the Store

Although creating a backup copy of a store does not generally cause any serious difficulties, it is important to follow the standard sequence of operations that ensures trouble-free backup. First of all you should check a number of basic conditions like the amount of free disk space, available access opportunities, etc. If everything is okay, you can proceed to backing up the store database and files.

This section covers the following topics:

- [Prerequisites](#)
- [Backing up the store database](#)
- [Backing up the store files](#)

### 9.8.1.1. Prerequisites

Before you start making a back up copy of your store, make sure of the following:

- You have enough free disk space on your server or hosting account where your store is installed.

To estimate the minimal required amount of free disk space correctly, you can use the following formula:  
*2 kilobytes (kB) per each product in the store database + size of the folder images/ + size of the folder files/ + 50 megabytes (MB).*

For example, if your store database consists of 5000 products, the size of the folder images/ is 66.7MB and the size of the folder files/ is 35.77MB, then you need  $(2 \text{ kB} * 5000)/1024 + 66.7\text{MB} + 35.77\text{MB} + 50\text{MB} = 9.76\text{MB} + 66.7\text{MB} + 35.77\text{MB} + 50\text{MB} = 162.23\text{MB}$ .

**Note:** If you do not have enough free disk space, try to remove the files that you do not longer use or move them to another location.

- You can access your server or hosting account using one of these options: terminal SSH or Telnet access, FTP, remote desktop (available for Windows-based servers only), your hosting control panel.

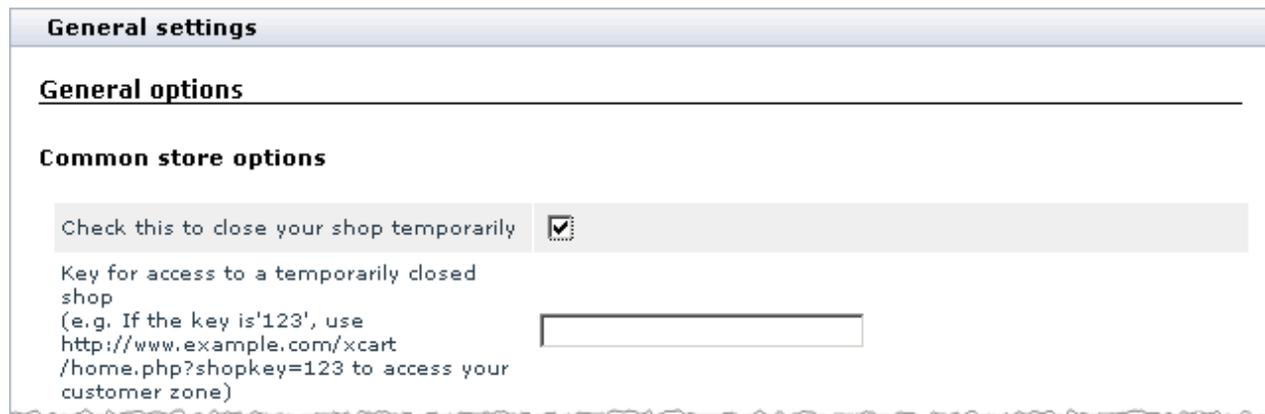
**Note:** If you cannot access your server or hosting account via these or other alternative options, address your hosting team for help.

- The directory to which you are going to save the backup copy has writable permissions.
- The Customer area of your store is temporarily closed for maintenance.

Having the Customer area closed ensures that none of your website visitors will be able to shop through your store and place orders while you are backing up your store, and the backup will include all the info that is available by the moment you start this task.

To close the store for maintenance:

1. Log in to the Admin area.
2. Go to the General settings section (Administration menu -> General settings).
3. In the General options box, select the **Check this to close your shop temporarily** check box. If necessary, enter a key for accessing the Customer area into the **Key for access to a temporarily closed shop** field.



**General settings**

**General options**

---

**Common store options**

Check this to close your shop temporarily

Key for access to a temporarily closed shop  
(e.g. If the key is '123', use  
http://www.example.com/xcart  
/home.php?shopkey=123 to access your  
customer zone)

4. Click the **Save** button.

From here on, all your store visitors will be automatically redirected to a special page saying that the store is temporarily inaccessible and can be visited later. To open the store back, log in to the Admin area and unselect the checkbox.

### 9.8.1.2. Backing up Store Database

With X-Cart the store administrator can back up the store database in a few easy steps directly from the Admin area. However, this way of backing up the database may be unsuitable if, for example, X-Cart utilizes third-party add-on modules and custom code: new tables introduced by these modules and code may be excluded from the SQL dump, which is generated automatically.

In such situations you must back up the database manually so that the dump includes all the store data. For this purpose you can use any adequate facility, including different client implementations of the SSH protocol like OpenSSH or PuTTY, Telnet, phpMyAdmin, MySQL console, control panel of your hosting account, Remote Desktop client and other. Later in this section you will find an example of how to create a database dump using terminal access (SSH or Telnet) to the server or hosting account where X-Cart is installed. For instructions on how to create a database dump with a different utility, please consult the documentation for the utility you use, or contact the X-Cart Support Team for help (See section [Getting Help](#) ).

#### Backing up the database through X-Cart Admin area

*To back up the database through the X-Cart Admin area:*

1. Log in to the Admin area.
2. Go to the Database Backup/Restore section (Administration menu -> DB backup/restore).

You will see the Database Backup/Restore box.

3. In the Backup database section of the box, click the **Generate SQL file** button. If necessary, additionally select the **Write SQL dump to file '<file\_name>'** check box;

### Database Backup/Restore

#### Backup database

If all the images are stored in the database they will be included in SQL dump file.  
If any of the images or all the images are stored on the file system, for backup purposes you should save them to a separate archive file. Account must be taken of the structure of the catalogs in which these images are located.

Write SQL dump to file '/home/user/public\_html/xcart/var/tmp/xcartdump.sql'  
(Do not forget to remove the file after downloading)

**Generate SQL file**

**Note:** Only X-Cart tables can be backed up/restored using this functionality. Any third-party module tables will not be affected. Database backup can take several minutes. Please be patient.

By selecting the check box you tell X-Cart to save the SQL dump to the default file and location on the server file system (file xcartdump.sql in the directory <xcart\_dir>/var/tmp/). It is good to save the SQL dump to the server if it is going to be rather large and you want to ftp it to your local computer or another location on the server later. If you leave the check box unselected, the SQL dump will be saved onto your local computer.

**Important:** If you do not have access to your server/hosting account through FTP, SSH or other suitable facility, do **not** select the check box and save the SQL file directly to your local computer.

## Backing up the database using terminal access

*To back up the database using terminal access to the server:*

1. Log in to your server or hosting account.
2. Go to the X-Cart root directory.
3. Run the following shell command.

```
> mysqldump -h<db_host> -u<username> -p<password> -r<backup_filename> <db_name>
```

The abbreviations in the command mean:

db\_host     :: The DNS name or the IP-address of your MySQL server.

username    :: The username for your MySQL user account.

password    :: The password for your MySQL user account.

backup\_fil  :: The name and the path to the newly created SQL file with the database dump.  
ename

db\_name     :: The name of the MySQL database that you use for X-Cart.

After you have run the command, the system will generate an SQL file and save it to the directory that you have specified in the <backup\_filename> part of the command. If you have specified the name of the file for the backup only without mentioning the path, the file will be saved to the X-Cart root directory, the directory where you are currently located.

If necessary, you can use a different path, but it is yet recommended that it be a location within the X-Cart root directory.

### 9.8.1.3. Backing up Store Files

Creating a backup copy of the store files presumes that you pack all the files in the X-Cart root directory into an archive and then copy or move the archive to a new location on the remote server or your local computer.

**Note:** If you have previously saved the database dump into the predefined file in the X-Cart root directory (folder <xcart\_dir>/var/tmp/), the file will also be included into the archive.

To create an archive you need to use a file archive manager. The exact choice of the archive manager will depend on the operating system you use. On a **UNIX-based** server, the most popular archive manager, which is currently installed on the majority of servers, is TAR. Later in this section you will find an example of how to archive the X-Cart files with the TAR archive manager. On a **Windows-based server**, you can create the archive with one of the available file archive managers for Windows, including WinRAR, WinZIP, PKZip and 7Zip. You need to pack the whole X-Cart root directory to an archive and then save the archive to the directory that is parent to the X-Cart root directory.

Alternatively, if it is not possible to pack the X-Cart files into an archive directly on your server, you can copy the X-Cart root directory to your local computer or another remote server using **FTP** or other suitable facility. Before that, make sure the new location, to which you are planning to copy the X-Cart root directory, has enough free disk space. Besides, the **control panel** of your hosting provider may offer its own facilities for

backing up your account data. For exact instructions, consult the documentation for the utility you use, or contact the X-Cart Support Team for help (See section [Getting Help](#)).

### Backing up store files with the TAR archive manager (UNIX-based servers only)

In UNIX-based systems, TAR is known to be one of the most reliable and trustworthy utilities for creating and manipulating file archives. It is now commonly used in tandem with external compression utilities like GZIP, BZIP2 or LZMA, which enables you not only to create an archive, but also compress the data in the archive. As a result, with TAR you can create a lightweight archive of your store and then restore it using the same utility. To find out whether TAR is installed on your server, run the following shell command.

```
> tar --version
```

If TAR is installed on your server, the system will display a message with the version of the utility; otherwise you will see an error message. In case of the latter, please contact your hosting team for help.

To back up files with the TAR archive manager:

1. Log in to your server or your hosting account.
2. Go to the X-Cart root directory.
3. In the X-Cart root directory run the following shell command.

```
> tar -czfv ../store_backup.tgz *
```

After you have run the command, TAR will pack all the files in the X-Cart root directory to the file `store_backup.tgz` and compress it with the ZIP data compression algorithm. The file will be saved to the directory that is parent to the X-Cart root directory. For example, if the X-Cart root directory is `u/user/public_html/xcart`, the file `store_backup.tgz` will be saved to directory `u/user/public_html`.

## 9.8.2 Restoring the Store from a Backup

Generally speaking, restoring a store from a backup copy is an inverse procedure to creating the backup copy, which is described in section [Backing up the Store](#) earlier in this manual. When restoring the store, you are expected to use the same tools that you used to create the backup copy. Similar to creating the backup, restoring does not cause any serious difficulties, but it yet requires the standard sequence of operations: restore the store files and then restore the database. One of the major rules to be observed is to restore data from the backup to a newly created directory within the WWW part of your hosting account. You must keep with this rule no matter whether you simply copy/move the store to a new location or replace an existing installation with the backup copy. After you have restored your store from the backup, you may need to adjust some configuration settings, including the values of the variables in the main configuration

file config.php, paths to images, file permissions, etc.

This section covers the following topics:

- [Prerequisites](#)
- [Restoring the store files from an archive](#)
- [Restoring the store database from an SQL dump](#)

### 9.8.2.1. Prerequisites

Before you start restoring your store from a backup, make sure of the following:

- You can access your server or hosting account using one of these options: terminal SSH or Telnet access, FTP, remote desktop (available for Windows-based servers only), your hosting control panel.

**Note:** If you cannot access your server or hosting account via these or other alternative options, address your hosting team for help.

- You have enough free disk space on the server where you are planning to restore your store. It is recommended that you have at least twice as much free disk space as is taken by the backup copy (X-Cart files + SQL dump).
- The directory to which you are planning to restore your store has writable permissions.

### 9.8.2.2. Restoring Store Files from Archive

The instructions below generally describe how to restore X-Cart files from a backup copy. Examples and notes are provided for UNIX- and Windows-based servers. Many of the listed operations can be carried out through your server/hosting control panel (if any). For instructions on how to use the control panel either consult the documentation for your control panel or contact your hosting team for help, or you can contact the X-Cart Support Team (See section [Getting Help](#)).

To restore X-Cart files:

1. Log in to your server or your hosting account.
2. Go to the directory that contains all your Internet projects (usually referred to as the WWW directory), and create a new directory where you will deploy the store from the backup.
  - On a UNIX-based server, you can create the new directory using the following shell command.

```
> mkdir xcart
```

- On a Windows-based server, you can create the new directory using the graphic user interface (GUI).

As a result, you should get an empty directory that is accessible through the Internet.

3. Go to the directory that you have just created and upload the X-Cart files (or the archive with X-Cart files) onto the directory using FTP, SCP, your control panel or other suitable facility.
4. If you have the X-Cart files in an archive, extract them using the available utilities.

- On a Unix-based server, you can extract files from the archive using the following shell command.

```
> tar -xfv <archive_name>
```

or

```
> tar -xzfv <archive_name> # If the archive has file extension *.tar.gz, *.g
```

or

```
> tar -xjfv <archive_name> # If the archive has file extension *.tbz.
```

- On a Windows-based server, you can extract the archive with one of the available file archive managers for Windows, including WinRAR, WinZIP, PKZip or 7Zip.
5. Check the X-Cart directory. It must contain the standard X-Cart file structure. If it only contains one directory with the X-Cart files, move its content to the current directory.
  6. If necessary, edit the main X-Cart configuration file config.php:

- a) Locate the file config.php and open it for editing in your favorite plain text editor.

- b) Set correct values for the following variables:

```
$sql_host = '%SQL_HOST%';           # The DNS name or the IP-address of your MySQL server  
$sql_user = '%SQL_USER%';          # The username for your MySQL user account  
$sql_db   = '%SQL_DB%';            # The name of your MySQL database  
$sql_password = '%SQL_PASSWORD%'; # The password for your MySQL user account
```

and

```
$xcart_http_host = "$HTTP_HOST";    # The host name of the server on which X-Cart is installed  
$xcart_https_host = "$HTTP_HOST";   # The host name of the secure server where X-Cart is installed  
$xcart_web_dir   = "/xcart";        # The web accessible directory of your X-Cart installation
```

For more info on how to edit these variable, refer to the [Configuration File config.php](#) section of this manual.

7. Create a new database for the store using a database management system (DBMS) that you usually use to manage your MySQL databases.

- On a Unix-based server, you can create the new database using the following shell command.

```
> mysql -h<sql_host> -u<sql_user> -p -e"create database <sql_db>;"
```

If you connect to the database server through a non-typical port or socket, use the following command.

```
> mysql -P<sql_port> -h<sql_host> -u<sql_user> -p -e"create database <sql_db>;"
```

or

```
> mysql -S<sql_socket> -h<sql_host> -u<sql_user> -p -e"create database <sql_db>;"
```

The system will ask you to enter your password for the MySQL account. After the password is accepted, the system will create a new empty database for your store.

**Important:** The name/address of the MySQL server, the name of the MySQL database, the username and the password for the MySQL account must be the same as the values of the respective variables in the X-Cart configuration file `config.php`.

### 9.8.2.3. Restoring Store Database from SQL Dump

When you restore a database from an SQL dump, the existing database tables get overwritten. We strongly recommend that you always back up the current store database before restoring data from an SQL dump as it allows you to avoid any possible data loss. Another critical issue here is that you can restore the database only if the SQL dump was created for the same X-Cart version.

The store administrator can restore the database either through the X-Cart Admin area or manually. If you decide to carry out this task manually, ensure that you have access to the respective tools and facilities, including different client implementations of the SSH protocol like OpenSSH or PuTTY, Telnet, phpMyAdmin, MySQL console, control panel of your hosting account, Remote Desktop client and other. In this case, the exact instructions on how to restore the database from the backup will depend on the utility you use.

The example below describes how you can restore the database using terminal access (SSH or Telnet) to the server or hosting account where X-Cart is installed. If you use a different utility, consult the documentation for the utility, or contact the X-Cart Support team for help (See section [Getting Help](#)).

#### Restoring the database through X-Cart Admin area

*To restore the database through the X-Cart Admin area:*

1. Log in to the Admin area.
2. Go to the section Database Backup/Restore (Administration menu -> DB backup/restore);
3. Restore the database from the SQL dump using the instructions below.

- If the SQL dump is saved in the predefined file located on the server file system (file xcartdump.sql in directory <xcart\_dir>/var/tmp/):
  - a) Click the **Restore** button.
  - b) Confirm the action.
  - c) Wait until the system displays a message saying that the database has been restored successfully.
- If the SQL dump is saved on a local computer:
  - a) Click the **Browse...** button to display the dialog box for uploading files.
  - b) Select the file with the SQL dump.
  - c) Click the **Restore from file** button.

Wait until the system displays a message saying that the database has been restored successfully.

**Database Backup/Restore**

---

**Backup 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: 2Mb.  
**Note:** Database restoration can take several minutes. Please be patient.

**Note:** You can restore the database through the Admin area only if the size of the SQL dump does not exceed the value in line "WARNING! The maximum file size that can be uploaded:...". This value is defined by the PHP settings of your server. If you have access to the PHP configuration file php.ini, you can increase/decrease the maximum file size by editing the value of the variable \$max\_upload\_size.

## Restoring the database using terminal access

To restore the database using terminal access to the server:

1. Log in to your server or your hosting account.
2. Run the following shell command.

```
> mysql -h<sql_host> -u<sql_user> -p <sql_db> < <store_backup.sql>
```

If you connect to the database server through a non-typical port or socket, the command should be

```
mysql -P<sql_port> -h<sql_host> -u<sql_user> -p <sql_db> < <store_backup.sql
```

or

```
mysql -S<sql_socket> -h<sql_host> -u<sql_user> -p <sql_db> < <store_backup.s
```

The system will ask you to enter your password for the MySQL account. After the password has been accepted, the system will populate the database with the data from the SQL dump.

**Important:** The name/address of the MySQL server, the name of the MySQL database, the username and the password for the MySQL account must be the same as the values of the respective variables in the X-Cart configuration file `config.php`.

### 9.8.3 Safety Tips

- **Remove the SQL dump and the packed archive from the WWW directory of your server or hosting account**

It is strongly recommended that you do not leave the SQL dump of the store database and the packed archive with X-Cart files anywhere in the WWW directory of your server or hosting account where you keep your Internet projects and which is publicly accessible. Otherwise, your store data can be easily stolen as anybody will be able to access the database dump through the Web.

A good practice here is to keep the backup on a local computer or in a directory on a remote server that cannot be accessed through the Web. For example, if the root directory of your hosting account is `/u/user/` and the web directory is `/u/user/public_html/`, you must move the SQL dump and the store archive from the directory `/u/user/public_html/` to somewhere in the directory `/u/user/`.

If you backed up the database through the X-Cart Admin area, make sure you have not left the dump (file `xcartdump.sql`) in the directory `<xcart_dir>/var/tmp/`, which is the pre-defined directory for the SQL dump generated by X-Cart.

## 9.8.4 Troubleshooting

Problem	Possible cause	Solution
The system says you do not have enough privileges to write to the file	User who has run the PHP script is not allowed to write files to the directory.	Set writable permissions to the directory where you are trying to save the SQL dump to, and repeat the task.
The system says you do not have enough free disk space to complete the operation.	File system does not have enough free disk space.	Since some data has been saved to the file before the error message, first remove the file with the backup. Then either make available more free space and repeat the task, or choose to save the file to another location.
Task was terminated and the system says you will be redirected to the previous page.	The memory that was allocated to the script has exhausted	<p>Increase the amount of memory allocated to the script by increasing the default value of the \$memory_limit variable in the php.ini file. If you do not have access to the php.ini file, ask your hosting team to help you.</p> <p><b>Important:</b> It may be necessary to increase the allocated memory several times, because it is impossible to predict how much memory you really need.</p>

## 9.9 Upgrading X-Cart

The X-Cart team regularly improves and updates the X-Cart shopping cart by releasing new software versions and branches. With each new release, X-Cart gains a series of fixes and advances that make the software even more powerful, efficient and secure. Some of these improvements only fine-tune the existing X-Cart behavior, but other change it dramatically by introducing new features and opportunities, affecting the software hard core, database structure and user interfaces. And it seems quite natural that at some point you may decide to upgrade your store to the latest version so that to be able to use all the advantages of newer releases.

Specially for those store owners who already use earlier X-Cart versions and want to upgrade their stores, together with new software versions we release special upgrade packs that allow store owners to iron differences between their existing copies of X-Cart and the latest X-Cart versions. Both the new releases and the upgrade packs are available for download to registered X-Cart license owners through their personal Help Desk accounts at <https://secure.qtmsoft.com>.

## Understanding X-Cart upgrade procedure

In order to understand the X-Cart upgrade procedure you should first have a look at the X-Cart version numbering scheme, which is determined by the current software architecture. X-Cart uses the sequence-based software versioning scheme of three-sequence identifiers like 4.2.2 or 4.3.1. In the sequence, the first two numbers mean the major X-Cart version, which is commonly referred to as a *branch*, and the third number means the minor X-Cart version, the software version within a branch. The major version numbers get increased when there has been a significant revision of the software functionality, behavior and template structure while the minor version number is incremented when only minor features and significant fixes have been added to the software but the overall software structure and behavior have remained untouched. This stipulates two different approaches to the upgrade depending on whether you upgrade to a later minor version within one branch or to a later major version (branch).

### Upgrading to later minor version

When you upgrade the store to a later minor version within one branch (for example, from X-Cart 4.2.1 to X-Cart 4.2.2), you can smoothly upgrade the default software code, database and design. In order to upgrade the store you will need to apply an upgrade pack - a set of patch files - that will iron out the differences between your copy of X-Cart and the X-Cart version to which you upgrade. The packs are applied automatically through a special section of the X-Cart Admin area.

Nonetheless this task can become a more complicated one if you upgrade the store within one of the earlier branches like 3.5.x or 4.0.x as there may be no direct pack to upgrade from a given version of the store to the required version, and you will need to successively apply several upgrade packs until you upgrade the required version then. For example, if the current version of your store is X-Cart 4.0.6 and you want to upgrade to X-Cart 4.0.19, the latest version within the branch 4.0.x, first you will need to upgrade to version 4.0.17, then from version 4.0.17 to version 4.0.18, and eventually you will be able to upgrade to version 4.0.19. Besides, you will need to re-install the skin template and the add-on modules, if you use any.

**Important:** Take note that if your store utilizes some custom code or has serious design changes, the files and database tables that were modified within a custom development project will be skipped or updated partially, which is likely to damage the custom functionality and design, and even affect the default X-Cart functionality. If you are not sure whether the custom functionality and design will remain

intact after the upgrade, consult the X-Cart Support team (see section [Getting Help](#)).

### Upgrading to later major version (branch)

When you upgrade your store to a later major version (e.g. from X-Cart 4.2.x to X-Cart 4.3.x), you can only upgrade the default store database, but you will need to install a fresh copy of X-Cart and point it to the upgraded database. This approach is conditioned by the X-Cart architecture that changes significantly with every new branch leaving no technical feasibility to upgrade the software code and design automatically.

In order to upgrade the database, you need to run a special script that will convert the data in the database so that it could be used with a particular X-Cart version to which you upgrade the store. For convenience, a particular database structure is referred to in accordance with the X-Cart version that the database is compatible with. For example, the database version 4.2.1 means that the database can be used with X-Cart version 4.2.1.

Frustratingly, the set of available upgrade scripts is rather limited, and there may be no upgrade script that can convert the given database to the required one directly. In this case, you will need to convert your store database several times until you get the database that is compatible with the X-Cart version to which you upgrade your store. The list of available direct database upgrades is shown in the table below: The column on the left contains a source database version; the column on the right contains the list of direct database upgrades available for a particular source database.

Source X-Cart DB Version	Direct X-Cart DB Upgrades
3.5.10	<b>X-Cart Branch 4.0.x</b> <ul style="list-style-type: none"> <li>▪ 4.0.1</li> </ul>
3.5.12	<b>X-Cart Branch 4.0.x</b> <ul style="list-style-type: none"> <li>▪ 4.0.6</li> </ul>
3.5.14	<b>X-Cart Branch 4.0.x</b> <ul style="list-style-type: none"> <li>▪ 4.0.12</li> </ul> <b>X-Cart Branch 4.1.x</b> <ul style="list-style-type: none"> <li>▪ 4.1.11</li> <li>▪ 4.1.12</li> </ul>

4.0.19	<b>X-Cart Branch 4.1.x</b> <ul style="list-style-type: none"> <li>▪ 4.1.11</li> <li>▪ 4.1.12</li> </ul>
4.1.11	<b>X-Cart Branch 4.2.x</b> <ul style="list-style-type: none"> <li>▪ 4.2.0</li> </ul>
4.1.12	<b>X-Cart Branch 4.2.x</b> <ul style="list-style-type: none"> <li>▪ 4.2.1</li> <li>▪ 4.2.2</li> </ul> <b>X-Cart Branch 4.3.x</b> <ul style="list-style-type: none"> <li>▪ 4.3.0</li> </ul>
4.2.3	<b>X-Cart Branch 4.3.x</b> <ul style="list-style-type: none"> <li>▪ 4.3.0</li> </ul>

In the situation when you have to upgrade the database several times, it is recommended that you follow these simple rules:

- When you have to upgrade within a branch, carry out the in-branch upgrade on a more recent branch, if there is an alternative.

The upgrade engine improves with each new X-Cart release, and the upgrade on a more recent branch keeps a risk of a failure or mistake to a minimum. For example, when you upgrade the database for X-Cart 4.1.11 to the database for X-Cart 4.2.2 the two alternatives are as follows:

(A) 4.1.11 -> 4.2.1 -> 4.2.2

(B) 4.1.11 -> 4.1.12 -> 4.2.2

(A) is the recommended alternative as the in-branch upgrade is carried out on a more recent branch X-Cart 4.2.x.



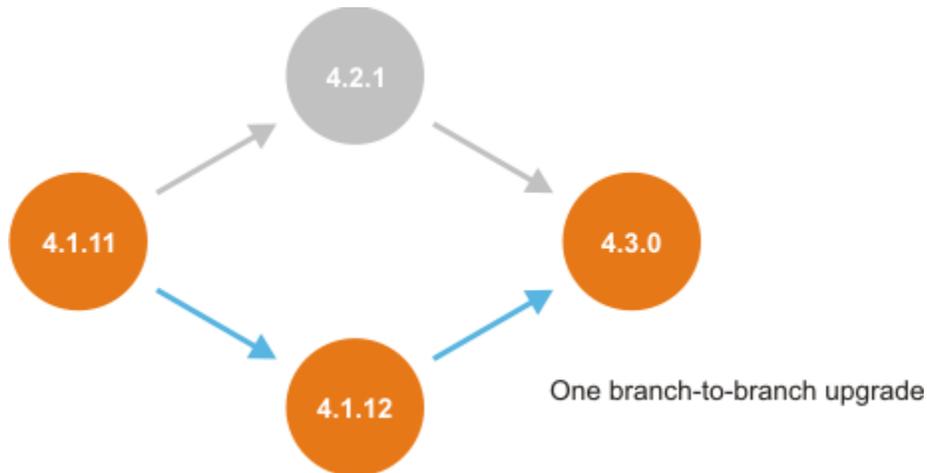
- When you need to leap over a branch (e.g. from X-Cart 4.1.x to X-Cart 4.3.x), minimize the number of branch-to-branch upgrades.

With a branch-to-branch upgrade the data in the database is converted, which theoretically increases a possibility of a fault or data loss. For example, when you upgrade the database for X-Cart 4.1.11 to the database for X-Cart 4.3.0 the two alternatives are as follows:

(A) 4.1.11 -> 4.1.12 -> 4.3.0

(B) 4.1.11 -> 4.2.1 -> 4.3.0

(A) is the recommended alternative as it supposes only one branch-to-branch upgrade while the (B) alternative supposes two branch-to-branch upgrades.



**Important:** You must be aware that with the upgrade to a later major version it is impossible to transfer the custom code and design automatically. So if you use any in your store, you will need to re-implement the custom code and design after the upgrade, which is rather a resource-consuming task that requires adequate experience in PHP, HTML and MySQL.

## Associated Difficulties

New releases not only enrich the software with new features and capabilities, but they get rid of obsolete elements and techniques that are no longer in great demand. But you may have gotten used to the current logics and behavior of the X-Cart version that you use; or you may extensively use the elements that are not supported in later X-Cart releases. In such a situation, the upgrade may involve extra inconvenience. It is recommended that you study the CHANGELOG, which is updated with each new release and is included into every distribution package. The CHANGELOG provides a complete list of fixes and improvements that were introduced to a new X-Cart release.

Another critical issue about the upgrades is that seamless upgrade is only possible if the store uses a default database and template structure, and has only minor changes like its own store logo and similar. Yet, if the store has serious design changes or it utilizes some custom code and third-party add-on modules that interfere with the original software behavior, **you will need to re-implement custom code and design after the upgrade**, which requires adequate experience in PHP, HTML and MySQL. So, if you use some custom functionality, find out if it is possible to keep it after the upgrade.

On the whole, upgrading X-Cart is a resource-consuming task, which demands that you understand what you are going to do and why. The rule here is not to upgrade to a newer version if there is no need to do this and you are satisfied with how the store works at the moment.

If you decide that your store needs to be upgraded, be honest when estimating your abilities: If you are not sure you have enough resources to perform this task on your own, do not start it. Leave it to professional engineers, and it will save your time, money and nerves.

### 9.9.1 Before the Upgrade

Before you start upgrading your store, first you should consider the development environment in which you will carry out the upgrade. The two alternatives here are to upgrade the store on a *local server* or on a *remote server*. Both options have their pros and cons, which are described in the section [Considering the Environment](#). Please examine this section thoughtfully and consider which of the two options meets your preferences and capabilities best.

Whichever option you choose, you must never carry out the upgrade on a live store, but you should use a development copy instead. For instructions and recommendation on how to create and use a development copy of the store, refer to the section [Making a Development Copy](#) further in this document.

### 9.9.1.1. Considering the Environment

The upgrade can be carried out on a local server or on a remote server. Each of the alternatives has its advantages and disadvantages

#### Local server (localhost)

In this context, a *local server* means the environment where a web server and associated resources (e.g., PHP, MySQL, etc.) are installed directly on your local machine or your local network, and you do not need internet access to connect to the server.

The **advantages** of upgrading the store on a local server are as follows:

- You can complete the upgrade (including the post-upgrade testing ) in the offline mode without the necessity to connect to the internet.
- You can carry out the whole task with the help of your favorite tools and facilities.

The **disadvantages** of upgrading the store on a local server include:

- You need to install and set up a local web server together with PHP and MySQL, which requires adequate technical knowledge and experience.
- The environment on the local server is likely to be different from the one on the remote server, which can affect the upgrade and reduce the accuracy of the post-upgrade testing.
- Third-party add-on modules may stop working if they utilize the per-domain licensing scheme.

#### Remote server

A *remote server* means the type of environment where a web server and associated resources are installed on a remote host, and you need internet access to connect to the server. A remote server can be a dedicated or a virtual server, or a simple shared hosting account.

The **advantages** of upgrading the store on a local server are as follows:

- The web server together with PHP and MySQL are already up and running.
- The environment is the same as the operational environment.
- All third-party add-on modules will work correctly.

The **disadvantages** of upgrading the store on a remote server include:

- You need to be online all the time during the upgrade.
- You are limited to the tools and facilities supplied by your hosting provider.

### 9.9.1.2. Making a Development Copy

Under no circumstance must you ever upgrade a live store. Instead use a development copy of the store, a store backup deployed on a local server or outside the directory on a remote server where your live store is physically located.

A development copy does not imply that you need to obtain an additional X-Cart license as the X-Cart Software License Agreement ([http://www.x-cart.com/software\\_license\\_agreement.html](http://www.x-cart.com/software_license_agreement.html)) does not prohibit you from having a copy of the store that is used for development and testing purposes. At that the development copy must not be accessible through the Internet, that is it must be installed on a local server or local network or be protected by password authentication.

For detailed instructions on how to make a backup copy of a store and then deploy it at a new location, refer to the section [Backup and Restore Procedures](#) earlier in this manual.

After you have upgraded the development copy, test it thoroughly as advised in the [Post-Upgrade Checklist](#) section further in this manual. When you make sure that everything works correctly, transfer the store to the live server (if you upgraded the development copy on a local computer or network) and test it on the live server as well. Then back up the existing store (both the store files and the database) and replace the live store with the one you have just upgraded.

## 9.9.2 Upgrading the Store

This chapter provides instructions on how to fulfill tasks involved into the upgrade process directly. The tasks include obtaining and applying upgrade packs and database upgrades.

### 9.9.2.1. Upgrading to Branch 4.3.x

Depending on what X-Cart branch and version your store belongs to, you can upgrade the store to branch 4.3.x either directly or through a series of transitional steps (upgrades). You will probably have to deal with the second option if you do not upgrade your store regularly because every new X-Cart branch is bundled with database upgrade packs for latest minor versions for two X-Cart branches antecedent to the current branch only.

This presumes that prior to upgrading to branch 4.3.x you must fulfill the following upgrade tasks:

- If your store belongs to branch 3.5.x, successively upgrade the database to version 4.1.12.
- If your store belongs to branch 4.0.x, successively upgrade the database to version 4.1.12.

- If your store belongs to branch 4.1.x, successively upgrade X-Cart to version 4.1.12.
- If your store belongs to branch 4.2.x, successively upgrade X-Cart to version 4.2.3.

#### 9.9.2.1.1 Obtaining Upgrade Packs

### Obtaining in-branch upgrade packs

To obtain an upgrade pack to a later minor version within a branch:

#### Branch 3.5.x

1. Log in to your Help Desk account at <https://secure.qtmsoft.com> .
2. Go to the File Area section and open the folder X-Cart -> X-Cart supporting files for prev versions -> X-Cart 3.5 -> Upgrade kits 3.5.x branch.
3. Locate an archive with the required upgrade pack. The archive must have one of the following formats:
  - [current\_version]-[target\_version]-gold\_upgrade.tgz or [current\_version]-[target\_version]-gold\_upgrade.zip
  - [current\_version]-[target\_version]-pro\_upgrade.tgz or [current\_version]-[target\_version]-pro\_upgrade.zip

where the [current\_version] part is the version of your current X-Cart installation, and the [target\_version] part is the X-Cart version to which you are upgrading the store. Take note that the gold or pro part must coincide with the X-Cart edition you use: X-Cart Gold or X-Cart Pro, respectively.

4. Download the archive with the upgrade pack to your local computer.

#### Branch 4.0.x

1. Log in to your Help Desk account at <https://secure.qtmsoft.com> .
2. Go to the File Area section and open the folder X-Cart -> X-Cart supporting files for prev versions -> X-Cart 4.0 -> Upgrade kits 4.0.x branch.
3. Locate an archive with the required upgrade pack. The archive must have one of the following formats:
  - [current\_version]-[target\_version]-gold\_upgrade.tgz or [current\_version]-[target\_version]-gold\_upgrade.zip

- [current\_version]-[target\_version]-pro\_upgrade.tgz or [current\_version]-[target\_version]-pro\_upgrade.zip

where the [current\_version] part is the version of your current X-Cart installation, and the [target\_version] part is the X-Cart version to which you want to upgrade the store. Take note that the gold or pro part must coincide with the X-Cart edition you use: X-Cart Gold or X-Cart Pro, respectively.

4. Download the archive with the upgrade pack to your local computer.

#### Branch 4.1.x

1. Log in to your Help Desk account at <https://secure.qtmsoft.com> .
2. Go to the File Area section and click the **Get upgrade pack** tab.

This will open the section Get upgrade pack.

3. Use the controls in the Get upgrade pack section to configure the required upgrade pack:
  - License: Select an X-Cart license that is registered for the store you want to upgrade.
  - Modules (optional): Select commercial add-on modules and skin templates that you want to upgrade together with the store.
  - Free modules: Select free add-on modules and skin templates that you want to upgrade together with the store.
  - Upgrade pack: Select a pack to upgrade your store from the current version to the target version.
  - Archive type: Select the type of an archive for the configured pack.
4. Click the **Get upgrade pack** button.

The system will generate the upgrade pack and open a dialog box asking you what to do with the archive.

5. Select to save the archive to your local computer.

#### Branch 4.2.x

1. Log in to your Help Desk account at <https://secure.qtmsoft.com> .
2. Go to the File Area section and click the **Get upgrade pack** tab.

This will open the section Get upgrade pack.

3. Use the controls in the Get upgrade pack section to configure the required upgrade pack:

- License: Select an X-Cart license that is registered for the store you want to upgrade.
  - Modules (optional): Select commercial add-on modules and skin templates that you want to upgrade together with the store.
  - Free modules: Select free add-on modules and skin templates that you want to upgrade together with the store.
  - Upgrade pack: Select a pack to upgrade your store from the current version to the target version.
  - Archive type: Select the type of an archive for the configured pack.
4. Click the **Get upgrade pack** button.
- The system will generate the upgrade pack and open a dialog box asking you what to do with the archive.
5. Select to save the archive to your local computer.

## Obtaining database upgrade scripts

To obtain a database upgrade pack:

### Branch 3.5.x to branch 4.1.x

1. Log in to your Help Desk account at <https://secure.qtmsoft.com> .
2. Go to the File Area section and open the folder X-Cart -> X-Cart supporting files for prev versions -> X-Cart 3.5 -> Upgrade kits for 3.5.x branch.
3. Locate an archive with the required database upgrade script. The archive must have one of the following formats:
  - [current\_version]-[target\_version]\_sql\_upgrade.tgz
  - [current\_version]-[target\_version]\_sql\_upgrade.zip
4. Download the archive with the database upgrade script to your local computer.

### Branch 4.0.x to branch 4.1.x

1. Log in to your Help Desk account at <https://secure.qtmsoft.com> .
2. Go to the File Area section and open the folder X-Cart -> X-Cart supporting files for prev versions -> X-Cart 4.0 -> Upgrade kits 4.0.x branch.

3. Locate an archive with the required database upgrade script. The archive must have one of the following formats:

- [current\_version]-[target\_version]\_sql\_upgrade.tgz
- [current\_version]-[target\_version]\_sql\_upgrade.zip

4. Download the archive with the database upgrade script to your local computer.

#### **Branch 4.1.x to branch 4.3.x**

1. Log in to your Help Desk account at <https://secure.qtmsoft.com> .

2. Go to the File Area section and open the folder X-Cart -> X-Cart 4.3.0 -> DB upgrader 4.1.12->4.3.0.

3. Locate an archive with the required database upgrade script. The archive must have one of the following formats:

- [current\_version]-[target\_version]\_sql\_upgrade.tgz
- [current\_version]-[target\_version]\_sql\_upgrade.zip

4. Download the archive with the database upgrade script to your local computer.

#### **Branch 4.2.x to branch 4.3.x**

1. Log in to your Help Desk account at <https://secure.qtmsoft.com> .

2. Go to the File Area section and open the folder X-Cart -> X-Cart 4.3.0 -> DB upgrader 4.2.3->4.3.0.

3. Locate an archive with the required database upgrade script. The archive must have one of the following formats:

- [current\_version]-[target\_version]\_sql\_upgrade.tgz
- [current\_version]-[target\_version]\_sql\_upgrade.zip

4. Download the archive with the database upgrade script to your local computer.

#### 9.9.2.1.2 Applying Upgrade Packs

### **Applying in-branch upgrade packs**

To apply an upgrade pack:

### Branch 3.5.x

1. Obtain an upgrade pack for your version of X-Cart as described in the section [Obtaining Upgrade Packs](#) earlier in this chapter.

Make sure the pack is intended for the source and target versions of your X-Cart installation.

2. Put the upgrade pack to the X-Cart root directory on your server or hosting account.

- *If you use a Windows-based server, or a UNIX-based server without terminal access:*

- a) Decompress the archive with the upgrade pack to a 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 the archive (retaining the directory structure) to the X-Cart root 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 archive with the upgrade pack to the X-Cart root directory on your server or your hosting account.

- b) Decompress the package using the following commands.

```
tar -xzvf <archive_filename>
```

3. Make sure that the files that will be patched during the upgrade have world writable permissions. Names of the files to be patched are listed in the file <xcart\_dir>/upgrade/[source-version]-[target-version]/file.lst.

If you use a UNIX-based server, to set world writable permissions to the required files you can run the following shell command

```
for i in `sed -e 's/,.*$/g' < upgrade/[source]-[target]/file.lst`; do chmod
```

replacing the [source] and [target] parts with the source and target versions of the X-Cart installation that you upgrade.

**Important!** You must run the command from the X-Cart root directory.

4. Log in to the X-Cart Admin area.

5. Go to the section Patch/Upgrade Center (Administration menu -> Patch/Upgrade).

You will see the Upgrade box.



**Upgrade**

Current version: **3.5.13**

Target version:

6. Select the target version from the drop-down box and click the **Apply** button.

X-Cart will test whether the required files can be patched successfully and list the files showing their status. The file statuses mean as follows:

- OK - File can be patched successfully.
- Checksum error - Patch is corrupted. Try to download the patch again.
- Non-writable - File does not have writable permissions. Set up writable permissions to the file.
- Not a file - Target is not a file. The original X-Cart structure has been modified and you need to apply the patch manually.
- Not exists - File is missing. The original X-Cart structure has been modified and you need to apply the patch manually.
- Could not patch - Patch cannot be applied to the file automatically as the original X-Cart structure has been modified and you need to apply the patch manually.
- Already patched - File has been patched already.

7. Click the **Apply patch** button at the bottom of the page.

X-Cart will start patching the files. When the patch is applied, X-Cart will display the list of patched files and a detailed report about what changes has been made.

8. Click the **Finish** button at the bottom of the page.

### Branch 4.0.x

1. Obtain an upgrade pack for your version of X-Cart as described in the section [Obtaining Upgrade Packs](#) earlier in this chapter.

Make sure the pack is intended for the source and target versions of your X-Cart installation.

2. Put the upgrade pack to the X-Cart root directory on your server or hosting account.
  - *If you use a Windows-based server, or a UNIX-based server without terminal access:*

- a) Decompress the archive with the upgrade pack to a 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 the archive (retaining the directory structure) to the X-Cart root 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 archive with the upgrade pack to the X-Cart root directory on your server or your hosting account.

- b) Decompress the package using the following commands.

```
tar -xzvf <archive_filename>
```

3. Make sure that the files that will be patched during the upgrade have world writable permissions. Names of the files to be patched are listed in the file <xcart\_dir>/upgrade/[source-version]-[target-version]/file.lst.

If you use a UNIX-based server, to set world writable permissions to the required files you can run the following shell command

```
for i in `sed -e 's/,.*$/g' < upgrade/[source]-[target]/file.lst`; do chmod
```

replacing the [source] and [target] parts with the source and target versions of the X-Cart installation that you upgrade.

**Important!** You must run the command from the X-Cart root directory.

4. Log in to the X-Cart Admin area.
5. Go to the section Patch/Upgrade Center (Administration menu -> Patch/Upgrade).

You will see the Upgrade box.

**Upgrade**

Current version: **4.0.18**

Target version:

6. Select the target version from the drop-down box and click the **Apply** button.

X-Cart will test whether the required files can be patched successfully and list the files showing their status. The file statuses mean as follows:

- OK - File can be patched successfully.
- Checksum error - Patch is corrupted. Try to download the patch again.

- Non-writable - File does not have writable permissions. Set up writable permissions to the file.
  - Not a file - Target is not a file. The original X-Cart structure has been modified and you need to apply the patch manually.
  - Not exists - File is missing. The original X-Cart structure has been modified and you need to apply the patch manually.
  - Could not patch - Patch cannot be applied to the file automatically as the original X-Cart structure has been modified and you need to apply the patch manually.
  - Already patched - File has been patched already.
7. Click the **Apply patch** button at the bottom of the page.
- X-Cart will start patching the files. When the patch is applied, X-Cart will display the list of patched files and a detailed report about what changes has been made.
8. Click the **Finish** button at the bottom of the page.

#### Branch 4.1.x

1. Obtain an upgrade pack for your version of X-Cart as described in the section [Obtaining Upgrade Packs](#) earlier in this chapter.

Make sure the pack is intended for the source and target versions of your X-Cart installation.

2. Put the upgrade pack to the X-Cart root directory on your server or hosting account.
- *If you use a Windows-based server, or a UNIX-based server without terminal access:*
    - a) Decompress the archive with the upgrade pack to a 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 the archive (retaining the directory structure) to the X-Cart root 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 archive with the upgrade pack to the X-Cart root directory on your server or your hosting account.
    - b) Decompress the package using the following commands.

```
tar -xzvf <archive_filename>
```

3. Make sure that the files that will be patched during the upgrade have world writable permissions. Names

of the files to be patched are listed in the file <xcart\_dir>/upgrade/[source-version]-[target-version]/file.lst.

If you use a UNIX-based server, to set world writable permissions to the required files you can run the following shell command

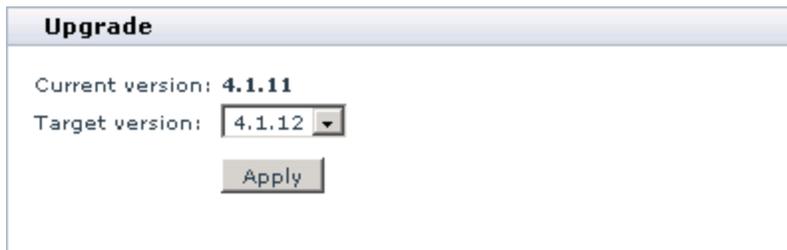
```
for i in `sed -e 's/,.*$/g' < upgrade/[source]-[target]/file.lst`; do chmod
```

replacing the [source] and [target] parts with the source and target versions of the X-Cart installation that you upgrade.

**Important!** You must run the command from the X-Cart root directory.

4. Log in to the X-Cart Admin area.
5. Go to the section Patch/Upgrade Center (Administration menu -> Patch/Upgrade).

You will see the Upgrade box.



The screenshot shows a web interface titled "Upgrade". It contains the following elements:

- Current version: 4.1.11
- Target version: 4.1.12 (with a dropdown arrow)
- An "Apply" button

6. Select the target version from the drop-down box and click the **Apply** button.

X-Cart will test whether the required files can be patched successfully and list the files showing their status. The file statuses mean as follows:

- OK - File can be patched successfully.
- Checksum error - Patch is corrupted. Try to download the patch again.
- Non-writable - File does not have writable permissions. Set up writable permissions to the file.
- Not a file - Target is not a file. The original X-Cart structure has been modified and you need to apply the patch manually.
- Not exists - File is missing. The original X-Cart structure has been modified and you need to apply the patch manually.
- Could not patch - Patch cannot be applied to the file automatically as the original X-Cart structure has been modified and you need to apply the patch manually.
- Already patched - File has been patched already.

7. Click the **Apply patch** button at the bottom of the page.

X-Cart will start patching the files. When the patch is applied, X-Cart will display the list of patched files and a detailed report about what changes has been made.

8. Click the **Finish** button at the bottom of the page.

### Branch 4.2.x

1. Obtain an upgrade pack for your version of X-Cart as described in the section [Obtaining Upgrade Packs](#) earlier in this chapter.

Make sure the pack is intended for the source and target versions of your X-Cart installation.

2. Put the upgrade pack to the X-Cart root directory on your server or hosting account.

- *If you use a Windows-based server, or a UNIX-based server without terminal access:*

- a) Decompress the archive with the upgrade pack to a 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 the archive (retaining the directory structure) to the X-Cart root 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 archive with the upgrade pack to the X-Cart root directory on your server or your hosting account.

- b) Decompress the package using the following commands.

```
tar -xzvf <archive_filename>
```

3. Make sure that the files that will be patched during the upgrade have world writable permissions. Names of the files to be patched are listed in the file `<xcart_dir>/upgrade/[source-version]-[target-version]/file.lst`.

If you use a UNIX-based server, to set world writable permissions to the required files you can run the following shell command

```
for i in `sed -e 's/,.*$/g' < upgrade/[source]-[target]/file.lst`; do chmod
```

replacing the [source] and [target] parts with the source and target versions of the X-Cart installation that you upgrade.

**Important!** You must run the command from the X-Cart root directory.

4. Log in to the X-Cart Admin area.
5. Go to the section Patch/Upgrade Center (Administration menu -> Patch/Upgrade).

You will see the Upgrade box.

### Upgrade

Current version: **4.2.1**  
Target version:

**Please use this function ONLY if you absolutely understand what you are doing. In most cases it is better to contact Qualiteam Software and let the experienced staff perform the upgrade for you.**

I confirm that:

- This X-Cart installation is not a live store
- I have created backup copies of the store and the store database
- I'm a PHP/MySQL experienced developer and I can resolve technical problems that may appear during and after the automatic upgrade
- I understand and agree that after the automatic upgrade I may be required to manually patch the files customized in past
- I understand and agree that the upgrade may add, change or even remove some features/functions of the current store version

6. Select the target version from the drop-down box, select all the check boxes above and click the **Apply** button.

X-Cart will test whether the required files can be patched successfully and list the files showing their status. The file statuses mean as follows:

- OK - File can be patched successfully.
- Checksum error - Patch is corrupted. Try to download the patch again.
- Non-writable - File does not have writable permissions. Set up writable permissions to the file.
- Not a file - Target is not a file. The original X-Cart structure has been modified and you need to apply the patch manually.
- Not exists - File is missing. The original X-Cart structure has been modified and you need to apply the patch manually.
- Could not patch - Patch cannot be applied to the file automatically as the original X-Cart structure has been modified and you need to apply the patch manually.
- Already patched - File has been patched already.

7. Click the **Apply patch** button at the bottom of the page.

X-Cart will start patching the files. When the patch is applied, X-Cart will display the list of patched files and a detailed report about what changes has been made.

8. Click the **Finish** button at the bottom of the page.

## Applying database upgrade packs

To upgrade the database:

### Branch 3.5.x to branch 4.1.x

1. Make sure the current version of your X-Cart installation can be upgraded to the target version directly.

Consult the chart in the opening section of the chapter [Upgrading X-Cart](#). If there is no a direct upgrade pack, you will need to upgrade to the required version through several transitional steps (upgrades).

2. Obtain the database upgrade pack as described in the section [Obtaining Upgrade Packs](#) earlier in this chapter.

3. Put the upgrade pack to the X-Cart root directory on your server or hosting account.

- *If you use a Windows-based server, or a UNIX-based server without terminal access:*

- a) Decompress the archive with the upgrade pack to a 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 the archive (retaining the directory structure) to the X-Cart root 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 archive with the upgrade pack to the X-Cart root directory on your server or your hosting account.

- b) Decompress the package using the following commands.

```
tar -xzvf <archive_filename>
```

4. In a web browser, run the upgrade script `<xcart_dir>/upgrade_sql.php` replacing the `<xcart_dir>` part with the true URL of your X-Cart installation. E.g., [http://www.example.com/xcart/upgrade\\_sql.php](http://www.example.com/xcart/upgrade_sql.php).

The script will display the progress of the upgrade task and finally report about the results.

5. Retrieve the value of the variable `$blowfish_key` from the file `config.php` in the root directory of your existing X-Cart installation and temporarily save it somewhere on your local computer.

You will be asked to provide the Blowfish key later in order that X-Cart to decrypt the data in the upgraded database.

6. Install a fresh copy of X-Cart 4.1.x. Make sure the copy of X-Cart that you are going to install is the same as the the version of the upgraded database.

When installing X-Cart:

- If you install X-Cart to the directory on your server or hosting account where a previous version of X-Cart is located, at the first step of the installation wizard select the radio button **New Installation** and enter the Auth code for the existing X-Cart installation. If you do not remember the code, retrieve the value of the variable `$installation_auth_code` from the file `<xcart_dir>/include/install.php`.
- At the step Preparing to Install X-Cart Database of the installation wizard, select the check box **Update config.php only** and enter Blowfish key for the upgraded database.

### Branch 4.0.x to branch 4.1.x

1. Make sure the current version of your X-Cart installation can be upgraded to the target version directly.

Consult the chart in the opening section of the chapter [Upgrading X-Cart](#). If there is no a direct upgrade pack, you will need to upgrade to the required version through several transitional steps (upgrades).

2. Obtain the database upgrade pack as described in the section [Obtaining Upgrade Packs](#) earlier in this chapter.
3. Put the upgrade pack to the X-Cart root directory on your server or hosting account.

- *If you use a Windows-based server, or a UNIX-based server without terminal access:*
  - a) Decompress the archive with the upgrade pack to a 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 the archive (retaining the directory structure) to the X-Cart root 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 archive with the upgrade pack to the X-Cart root directory on your server or your hosting account.
  - b) Decompress the package using the following commands.

```
tar -xzvf <archive_filename>
```

4. In a web browser, run the upgrade script `<xcart_dir>/upgrade_sql.php` replacing the `<xcart_dir>` part with the true URL of your X-Cart installation. E.g., [http://www.example.com/xcart/upgrade\\_sql.php](http://www.example.com/xcart/upgrade_sql.php).

The script will display the progress of the upgrade task and finally report about the results.

5. Retrieve the value of the variable `$blowfish_key` from the file `config.php` in the root directory of your existing X-Cart installation and temporarily save it somewhere on your local computer.

You will be asked to provide the Blowfish key later in order that X-Cart to decrypt the data in the upgraded database.

6. Install a fresh copy of X-Cart 4.1.x. Make sure the copy of X-Cart that you are going to install is the same as the the version of the upgraded database.

When installing X-Cart:

- If you install X-Cart to the directory on your server or hosting account where a previous version of X-Cart is located, at the first step of the installation wizard select the radio button **New Installation** and enter the Auth code for the existing X-Cart installation. If you do not remember the code, retrieve the value of the variable `$installation_auth_code` from the file `<xcart_dir>/include/install.php`.
- At the step **Preparing to Install X-Cart Database** of the installation wizard, select the check box **Update config.php only** and enter Blowfish key for the upgraded database.

### Branch 4.1.x to branch 4.3.x

1. Make sure the current version of your X-Cart installation can be upgraded to the target version directly.

Consult the chart in the opening section of the chapter [Upgrading X-Cart](#). If there is no a direct upgrade pack, you will need to upgrade to the required version through several transitional steps (upgrades).

2. Obtain the database upgrade pack as described in the section [Obtaining Upgrade Packs](#) earlier in this chapter.
3. Put the upgrade pack to the X-Cart root directory on your server or hosting account.
  - *If you use a Windows-based server, or a UNIX-based server without terminal access:*
    - a) Decompress the archive with the upgrade pack to a 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 the archive (retaining the directory structure) to the X-Cart root 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 archive with the upgrade pack to the X-Cart root directory on your server or your hosting account.

b) Decompress the package using the following commands.

```
tar -xzvf <archive_filename>
```

4. In a web browser, run the upgrade script <xcart\_dir>/upgrade\_sql.php replacing the <xcart\_dir> part with the true URL of your X-Cart installation. E.g., [http://www.example.com/xcart/upgrade\\_sql.php](http://www.example.com/xcart/upgrade_sql.php).

5. Read the X-Cart License Agreement that has been modified since X-Cart 4.1.x and click the **Proceed with Upgrade** button.

The script will display the progress of the upgrade task and finally report about the results.

6. Retrieve the value of the variable \$blowfish\_key from the file config.php in the root directory of your existing X-Cart installation and temporarily save it somewhere on your local computer.

You will be asked to provide the Blowfish key later in order that X-Cart to decrypt the data in the upgraded database.

7. Install a fresh copy of X-Cart 4.3.x as described in the section [Installing X-Cart](#) earlier in this manual. Make sure the copy of X-Cart that you are going to install is the same as the the version of the upgraded database.

When installing X-Cart:

- If you install X-Cart to the directory on your server or hosting account where a previous version of X-Cart is located, at the first step of the installation wizard select the radio button **New Installation** and enter the Auth code for the existing X-Cart installation. If you do not remember the code, retrieve the value of the variable \$installation\_auth\_code from the file <xcart\_dir>/include/install.php.
- At the step Preparing to Install X-Cart Database of the installation wizard, select the check box **Update config.php only** and enter Blowfish key for the upgraded database.

### Branch 4.2.x to branch 4.3.x

1. Make sure the current version of your X-Cart installation can be upgraded to the target version directly.

Consult the chart in the opening section of the chapter [Upgrading X-Cart](#). If there is no a direct upgrade pack, you will need to upgrade to the required version through several transitional steps (upgrades).

2. Obtain the database upgrade pack as described in the section [Obtaining Upgrade Packs](#) earlier in this chapter.
3. Put the upgrade pack to the X-Cart root directory on your server or hosting account.
  - *If you use a Windows-based server, or a UNIX-based server without terminal access:*
    - a) Decompress the archive with the upgrade pack to a 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 the archive (retaining the directory structure) to the X-Cart root 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 archive with the upgrade pack to the X-Cart root directory on your server or your hosting account.
- b) Decompress the package using the following commands.

```
tar -xzvf <archive_filename>
```

4. In a web browser, run the upgrade script `<xcart_dir>/upgrade_sql.php` replacing the `<xcart_dir>` part with the true URL of your X-Cart installation. E.g., [http://www.example.com/xcart/upgrade\\_sql.php](http://www.example.com/xcart/upgrade_sql.php).
5. Read the X-Cart License Agreement that has been modified since X-Cart 4.1.x and click the **Proceed with Upgrade** button.

The script will display the progress of the upgrade task and finally report about the results.

6. Retrieve the value of the variable `$blowfish_key` from the file `config.php` in the root directory of your existing X-Cart installation and temporarily save it somewhere on your local computer.

You will be asked to provide the Blowfish key later in order that X-Cart to decrypt the data in the upgraded database.

7. Install a fresh copy of X-Cart 4.3.x as described in the section [Installing X-Cart](#) earlier in this manual. Make sure the copy of X-Cart that you are going to install is the same as the the version of the upgraded database.

When installing X-Cart:

- If you install X-Cart to the directory on your server or hosting account where a previous version of X-Cart is located, at the first step of the installation wizard select the radio button **New Installation** and enter the Auth code for the existing X-Cart installation. If you do not remember the code, retrieve the value of the variable `$installation_auth_code` from the file `<xcart_dir>/include/install.php`.
- At the step Preparing to Install X-Cart Database of the installation wizard, select the check box

**Update config.php only** and enter Blowfish key for the upgraded database.

## 9.9.3 After the Upgrade

After you have upgraded the development copy of your store, it is important to make sure that everything works correctly before you start replacing your live store with the upgraded copy. The [Post-Upgrade Checklist](#) further in this section covers the basic X-Cart functionality and is intended to help you test most critical features.

Besides, after an upgrade it is important to carry out a number of tasks that pertain to the store maintenance (see section [Basic Maintenance Jobs](#)) and restore the original file permissions that were modified during the upgrade (see section [Restoring File Permissions](#)).

### 9.9.3.1. Basic Maintenance Jobs

After you have upgraded the store you need to carry out some basic maintenance-related tasks, which include regenerating the Blowfish key and cleaning the template cache.

#### Regenerating the Blowfish key

To regenerate the Blowfish key:

1. Log in to the X-Cart Admin area.
2. Go to the the Summary section (Administration menu -> Summary).
3. In the Summary section, go to the section Tools/Re-generate Blowfish encryption key.
4. Click the **Regenerate** button.

#### Cleaning the template cache

To clean the template cache:

1. Log in to the X-Cart Admin area.
2. Go to the the Summary section (Administration menu -> Summary).
3. In the Summary section, go to the section Tools/Clear templates cache.

4. Click the **Clean** button.

### 9.9.3.2. Restoring File Permissions

Original file permissions get changed during an upgrade, and you need to restore them after the upgrade to ensure correct functioning of the store. The instructions below describe what permissions must be set for X-Cart files and folders. The examples are provided for the Apache web server running on a UNIX-based operating system. If you use a different bundle, please refer to the documentation for the web server and operating system you use, or contact your hosting team for help.

#### General info

The exact set of file permissions would depend on whether the scripts are run in the privileged mode or non-privileged mode. The *privileged mode* means that scripts are run under the user who is the owner of the files while in the *non-privileged mode* scripts are run under a different user. This implies two different approaches to setting up file permissions:

- In the privileged mode, permissions must be granted to the owner of the files only as the scripts run under that user. Permissions for the members of the files' group and other users must be disabled then.
- In the non-privileged mode, permissions must be granted to the owner of the files, members of the files' group and other users who are not the owner of the file or members of the group.

On the Apache web server running on a UNIX-based operating system you can find out the current mode by running in a web browser the PHP script below. The script will display two user names: the name of the script owner who put the files to the server through FTP or SSH, and the name of the user who runs the scripts. If the two names coincide, the privileged mode is enabled; otherwise, you work in the non-privileged mode.

```
<?php
$processUser = posix_getpwuid(posix_geteuid());
print get_current_user() . " / " . $processUser['name'];
?>
```

On a UNIX-based operating system file permissions for a file are changed through the the following shell command.

```
chmod <permissions_code> <file_path>
```

The `permissions_code` part must be a three-digit number where each digit represents a different component of the permission set: file owner, members of the group who the file owner belongs to and other users who are not the file owner or group members. Each digit is a sum of three digits, which can be 0 (no

permission), 1 (execute a file or search in a directory), 2 (write) or 4 (read). Below is a list of all available values and their meaning:

- 0 : No permission
- 1 : Execute/search
- 2 : Write
- 3 : Write and execute/search
- 4 : Read
- 5 : Read and execute/search
- 6 : Read and write
- 7 : Read, write and execute/search

For example, the permissions code 740 for a file would mean that the file owner can read, write and execute the file (7), the group members can only read the file (4) and other users can do nothing with the file (0); the permissions code 511 for a directory would mean that the file owner read the contents of the directory and search in the directory (5) while the group members and other users can only search in the directory (1).

## Setting up file permissions for X-Cart files and directories

### Scripts and directories containing scripts

Privileged Mode	Non-privileged Mode
Directories: 711 <ul style="list-style-type: none"> <li>▪ Owner: read, write and search</li> <li>▪ Group: search</li> <li>▪ Other: search</li> </ul> Files: 600 <ul style="list-style-type: none"> <li>▪ Owner: read and write</li> <li>▪ Group: no permission</li> <li>▪ Other: no permission</li> </ul>	Directories: 777 <ul style="list-style-type: none"> <li>▪ Owner: read, write and search</li> <li>▪ Group: read, write and search</li> <li>▪ Other: read, write and search</li> </ul> Files: 644 <ul style="list-style-type: none"> <li>▪ Owner: read and write</li> <li>▪ Group: read</li> <li>▪ Other: read</li> </ul>

These permissions must be set for directories admin, customer, include, mail, modules, partner, payment, provider, shipping and upgrade and their subdirectories, and for all \*.php files from these

directories and the X-Cart root directory.

### Templates and directories containing templates

Privileged Mode	Non-privileged Mode
Directories: 711 <ul style="list-style-type: none"> <li>▪ Owner: read, write and search</li> <li>▪ Group: search</li> <li>▪ Other: search</li> </ul> Files: 644 <ul style="list-style-type: none"> <li>▪ Owner: read and write</li> <li>▪ Group: read</li> <li>▪ Other: read</li> </ul>	Directories: 777 <ul style="list-style-type: none"> <li>▪ Owner: read, write and search</li> <li>▪ Group: read, write and search</li> <li>▪ Other: read, write and search</li> </ul> Files: 666 <ul style="list-style-type: none"> <li>▪ Owner: read and write</li> <li>▪ Group: read and write</li> <li>▪ Other: read and write</li> </ul>

These permissions must be set for the directory skin1 and all its subdirectories, and for all files in the directory skin1 and its subdirectories.

### Temporary and service directories: Directory .pgp

Privileged Mode	Non-privileged Mode
Directories: 700 <ul style="list-style-type: none"> <li>▪ Owner: read, write and search</li> <li>▪ Group: no permission</li> <li>▪ Other: no permission</li> </ul> Files: 600 <ul style="list-style-type: none"> <li>▪ Owner: read and write</li> <li>▪ Group: no permission</li> <li>▪ Other: no permission</li> </ul>	Directories: 755 <ul style="list-style-type: none"> <li>▪ Owner: read, write and search</li> <li>▪ Group: read and search</li> <li>▪ Other: read and search</li> </ul> Files: 644 <ul style="list-style-type: none"> <li>▪ Owner: read and write</li> <li>▪ Group: read</li> <li>▪ Other: read</li> </ul>

These permissions must be set for the directory .pgp and its subdirectories, and for all files in the directory .pgp and its subdirectories.

**Temporary and service directories: Directories catalog and images**

Privileged Mode	Non-privileged Mode
Directories: 711 <ul style="list-style-type: none"> <li>▪ Owner: read, write and search</li> <li>▪ Group: search</li> <li>▪ Other: search</li> </ul> Files: 644 <ul style="list-style-type: none"> <li>▪ Owner: read and write</li> <li>▪ Group: read</li> <li>▪ Other: read</li> </ul>	Directories: 755 <ul style="list-style-type: none"> <li>▪ Owner: read, write and search</li> <li>▪ Group: read and search</li> <li>▪ Other: read and search</li> </ul> Files: 644 <ul style="list-style-type: none"> <li>▪ Owner: read and write</li> <li>▪ Group: read</li> <li>▪ Other: read</li> </ul>

These permissions must be set for the directories catalog and images and their subdirectories, and for all files in the directories catalog and images and their subdirectories.

**Temporary and service directories: Directory files**

Privileged Mode	Non-privileged Mode
Directories: 700 <ul style="list-style-type: none"> <li>▪ Owner: read, write and search</li> <li>▪ Group: no permission</li> <li>▪ Other: no permission</li> </ul> Files: 600 <ul style="list-style-type: none"> <li>▪ Owner: read and write</li> <li>▪ Group: no permission</li> <li>▪ Other: no permission</li> </ul>	Directories: 777 <ul style="list-style-type: none"> <li>▪ Owner: read, write and search</li> <li>▪ Group: read, write and search</li> <li>▪ Other: read, write and search</li> </ul> Files: 666 <ul style="list-style-type: none"> <li>▪ Owner: read and write</li> <li>▪ Group: read and write</li> <li>▪ Other: read and write</li> </ul>

These permissions must be set for the directory files and its subdirectories, and for all files in the the directory files and its subdirectories.

**Temporary and service directories: Subdirectories of directory var (excl. var/cache)**

Privileged Mode	Non-privileged Mode
Directories: 700 <ul style="list-style-type: none"> <li>▪ Owner: read, write and search</li> <li>▪ Group: no permission</li> <li>▪ Other: no permission</li> </ul> Files: 600 <ul style="list-style-type: none"> <li>▪ Owner: read and write</li> <li>▪ Group: no permission</li> <li>▪ Other: no permission</li> </ul>	Directories: 755 <ul style="list-style-type: none"> <li>▪ Owner: read, write and search</li> <li>▪ Group: read and search</li> <li>▪ Other: read and search</li> </ul> Files: 644 <ul style="list-style-type: none"> <li>▪ Owner: read and write</li> <li>▪ Group: read</li> <li>▪ Other: read</li> </ul>

These permissions must be set for all subdirectories in the directory var (excluding the subdirectory cache), and for all files in the subdirectories of the directory var (excluding the subdirectory cache).

#### Temporary and service directories: Directories var and var/cache

Privileged Mode	Non-privileged Mode
Directories: 711 <ul style="list-style-type: none"> <li>▪ Owner: read, write and search</li> <li>▪ Group: search</li> <li>▪ Other: search</li> </ul> Files: 600 <ul style="list-style-type: none"> <li>▪ Owner: read and write</li> <li>▪ Group: no permission</li> <li>▪ Other: no permission</li> </ul>	Directories: 755 <ul style="list-style-type: none"> <li>▪ Owner: read, write and search</li> <li>▪ Group: read and search</li> <li>▪ Other: read and search</li> </ul> Files: 644 <ul style="list-style-type: none"> <li>▪ Owner: read and write</li> <li>▪ Group: read</li> <li>▪ Other: read</li> </ul>

These permissions must be set up for the directory var and its subdirectory cache, and for all files in the directory var and its subdirectory cache.

### 9.9.3.3. Post-Upgrade Checklist

After you have upgraded the development copy of the store, you must not proceed to replacing the live store until you have tested it thoroughly as advised in the checklist below and made sure that the store functions correctly. For convenience, the checklist is divided according to the available user interfaces: Customer area, Admin area, Provider area (X-Cart PRO) and Partner area (X-Affiliate).

#### Customer area

Make sure you can successfully carry out the following tasks:

##### Registration and login

- Log in to the store as an existing customer.
- Register in the store as a new customer.

##### Product catalog

- Browse the product catalog and see products in subcategories of all levels.
- Find products using the built-in search and advanced search tool.
- Add a product to the cart from the product details page and from the product list.

##### Ordering and checkout

- Place several test order and proceed to checkout with every of them.
- Apply a discount coupon to the order.
- Make sure discounts of different types are calculated correctly.
- Make sure orders include taxes and taxes are calculated correctly.
- Make sure orders include shipping cost and the shipping charges are calculated correctly for different destination zones.
- Partially pay for the order with a gift certificate and pay for the rest of the order amount with a credit card.
- Place several orders that include the same set of products but use different discounts and discount coupons.

**Important:** When placing test orders and testing the checkout mechanism, use sandbox merchant accounts that are normally provided by every payment gateway/system. To test credit card payments,

use test credit card numbers. To find out what test credit card you should use, please refer to the documentation for your payment gateway/system.

## Admin area

Make sure you can successfully carry out the following tasks:

### Registration and login

- Log in to the Admin area.

### Product catalog

- Create a new product category.
- Edit and save category properties.
- Remove a category from the catalog.
- Re-assign a category to a different parent category.
  
- Create a new product.
- Edit and save product properties.
- Remove a product from the catalog.
- Clone a product.
- Re-assign a product to a different category.
- Search for a product using basic and advanced search mechanisms.
- Edit properties of several products at once.
  
- Add a product to the list of featured products.
- Remove a product from the list of featured products.

### Ordering and payment options

- Access the store orders.
- Search for orders and sort orders according to search criteria.
- Change order statuses in bulk.

- Delete selected orders.
- Issue invoices for the selected orders.
- Generate shipping labels for the selected orders.
- Export selected/all orders.
- Navigate between orders.
- Add tracking number to the order.
- Make sure order total is calculated correctly.
- Make sure order statuses get changed correctly.
  
- Create a new payment method.
- Edit and save existing payment methods.
- Enable a new real-time shipping method.

#### **User management**

- Create an administrator account.
- Edit and save administrator account details.
  
- Create a customer account.
- Edit and save customer account details.
  
- Create a provider account (X-Cart PRO).
- Edit and save provider account details (X-Cart PRO).
- Assign a product to a provider (X-Cart PRO).
  
- Block and unblock accounts of different types.
- Delete test provider and customer accounts.

#### **Company details**

- Edit company details and make sure they are displayed correctly.

- Make sure company details are displayed correctly in orders, invoices and email notifications.
- Make sure company details are used correctly when calculating shipping cost.

### **Shipping options**

- Enable shipping in the store.
- Edit general shipping options.
- Enable real-time shipping rate calculation.
- Make sure shipping rates are calculated correctly depending on customers' address.
  
- Create a new shipping method.
- Edit details of an existing shipping method.
- Edit shipping rates for an existing shipping method.
- Make sure shipping markup is calculated correctly.

### **Taxes**

- Create a new tax rule.
- Delete a tax rule.
- Edit tax rates for a tax rule.
- Make sure taxes are calculated correctly both in the Customer and Admin area.

### **Import/export**

- Make sure data can be exported correctly according to the defined options.
- Make sure data can be imported correctly.

## 9.9.4 Troubleshooting

Problem	Possible Cause	Solution	
One or more files have status <b>Non-Writable</b>	Necessary files do not have write permissions and thus cannot be patched.	Set write permissions for the files.	
One or more files have status <b>Checksum Error</b>	Patch contents was corrupted during the download or upload.	Download the patch once again.	
One or more files have status <b>Could Not Patch</b>	Comparing to the original states, the listed files have been modified dramatically or are missing, and thus they cannot be patched automatically.	Patch the files manually:  1. When applying the upgrade pack through the X-Cart Admin area, deselect to patch the files that didn't pass the test for applicability ("Step 1 of 2:...").  As a result, such files will be skipped but all other files will be patched automatically. The database will be successfully updated as well.	
One or more files have status <b>Not a File</b>			2. Manually patch the files that were excluded from automatic patching. This consists in applying DIFF files that could not be applied automatically.
One or more files have status <b>Not Exists</b>			For detailed information on how to use DIFF files, study <a href="http://www.gnu.org/software/diffutils/manual/diff.html">http://www.gnu.org/software/diffutils/manual/diff.html</a> .

# 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.

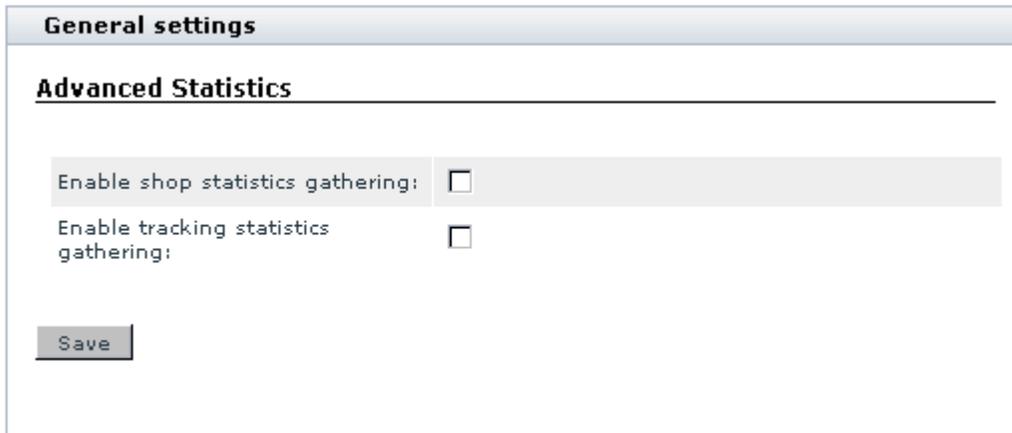
## 10.1.1 Enabling and Configuring 'Advanced Statistics'

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. It is titled 'General settings' and 'Advanced Statistics'. There are two checkboxes: 'Enable shop statistics gathering:' and 'Enable tracking statistics gathering:'. Both checkboxes are currently unchecked. A 'Save' button is located at the bottom left of the configuration area.

- 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.

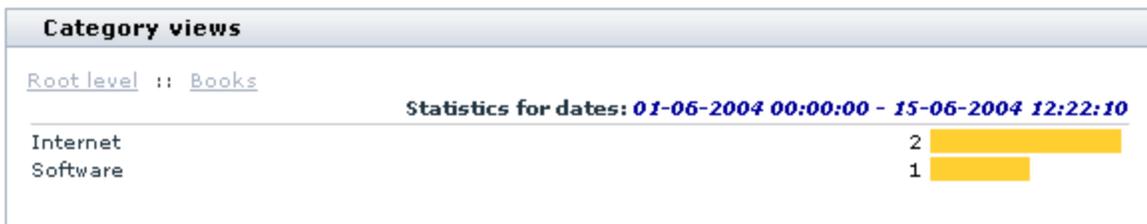
## 10.1.2 Understanding Shop Statistics

'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"/>
Force to use the "Auth only" mode if the fraud risk factor exceeds	<input type="text" value="0"/>
<p><b>Note:</b> Define the maximum allowed value of the fraud risk factor. When exceeded, X-Cart will force to perform the transaction in the "Auth only" mode even if the payment module is setup to use a different mode.</p> <p>The "Auth only" mode means that the system will only freeze the order total but not withdraw it until the store administrator decides to capture the money manually.</p> <p>If the payment method you use does not allow for authorize-only transactions, the transaction will not perform and the order will be placed with the Queued status.</p>	
<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.
- Force to use the "Auth only" mode if the fraud risk factor exceeds: Define the maximum allowed value of the fraud risk factor. When exceeded, X-Cart will force to perform the transaction in the "Auth only" mode even if the payment module is set up to use a different mode.  
The "Auth only" mode means that the system will only freeze the order total but not withdraw it until the store administrator decides to capture the money manually.  
If the payment method you use does not allow for authorize-only transactions, the transaction will not be performed and the order will be placed with the *Queued* status.

### 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 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->Search for 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'.



Queued

Tracking number:

IP: 111.111.111.111

Order details (not visible to customer and provider):  
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'.

The screenshot shows a web browser window titled "X-CART. Powerful PHP shopping cart software - Windows Internet Explorer". Inside the browser, a dialog box titled "Antifraud service" is open. The dialog has a sub-header "Lookup address". It contains the following fields and values:

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"/>
		Country:	* <input type="text" value="US"/>
		Zip/Postal code:	* <input type="text" value="50001"/>

Below the fields are two buttons: "Lookup address" and "Measure distance". At the bottom of the dialog, it says "The fields marked with \* are mandatory." In the bottom right corner of the dialog, there is a "Close window" button.

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:

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.

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:

**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		

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 Advanced Order Management

### What X-AOM module does

Designed for your convenience, **X-AOM** module is a powerful means to promote the efficiency of order management in your online store.

**X-AOM** introduces a number of new features enabling you to modify your customers' orders after they are placed. It allows you to add/remove items from order, edit parameters of the order, change delivery method, change pricing, discounts, shipping and more.

**X-AOM** enables convenient and quick order management.

**Note:** Pre-captured orders cannot be edited using X-AOM functionality.

The key features of this module include:

#### 1. Editing ordered products

- adding new products to the order
- removing products from the order
- updating the options and quantity of ordered products
- editing product prices

#### 2. Editing Gift Certificates

- changing the amount
- updating the original information (before the certificate has been activated)

### 3. Editing customer information

- updating personal and contact information
- editing billing/shipping addresses

### 4. Editing order totals

- changing delivery method
- changing payment method
- automatic recalculation of discounts, shipping costs, tax costs and order totals

**X-AOM** is a reliable and up-to-date solution that makes your business competitive.

## 10.3.1 Getting Started

This section of the manual provides instructions on how to carry out some basic tasks concerning the X-AOM add-on module.

### Opening Orders for Editing

Before you can start changing the order details, you must open the order for editing.

To open the order for editing:

1. In the X-Cart Admin area, go to the Orders section (Management menu->Search for orders).
2. Use the Search for orders form to find the order you want to edit.
3. Click on the order number to display the order details.
4. Click the **Modify** button to see the Advanced Order Management box.

**Advanced Order Management**  
**Order #1064**  
Date: 20-02-2009 11:19:15

---

- **Preview order**
  - [Edit ordered products](#)
  - [Edit ordered Gift Certificates](#)
  - [Edit customer information](#)
  - [Edit order totals](#)

---

[Save](#) > [Delete order](#) > [Cancel](#) > [Exit](#) >

Here you can choose to carry out the following tasks:

- Preview order: To preview the order at any moment;
- Edit ordered products: To modify the set of products in the order;
- Edit ordered Gift Certificates: To modify gift certificates in the order (if any);
- Edit customer information: To modify information about the customer who placed the order;
- Edit order totals: To modify the components that make up the order total (e.g., shipping cost, discount savings, etc.).

**Important:** Simultaneous editing of two or more orders during one session can result in incorrect functioning of the module. We recommend that you first finish editing one order before you start editing another order. To finish editing the order, save or cancel the changes and click the **Exit** button on the Advanced Order Management box.

## Previewing Order Details

While editing an order, you may wish to preview the order details. X-AOM allows you to preview the order details at any moment.

To preview the order you only need to click on the Preview order link in the the Advanced Order Management box. The Order # %order\_number%: Preview form will display the order details as shown below:

**Order #1064: preview****Products info****#16129. Short-sleeved poplin shirt**

SKU	SKU16129v
Provider	master
Price	\$36.34
Including	SampleTax: 6.25%
Quantity	1 item(s)
Selected options	Color: White Size: S

**Gift certificate**

Gift Certificate ID	2A8E86F35FD3FB36
Amount	\$200.00
Recipient	Lynn Smith
Recipient's e-mail	lynn.smith@example.com

**Order info**

Payment method	Credit Card (manual processing)
Delivery method	SampleShippingMethod_national
Subtotal	\$236.34
Discount	\$0.00
Coupon saving	\$0.00 ()
Shipping cost	\$2.50
<b>TOTAL</b>	<b>\$238.84</b>
including SampleTax	\$2.14

**Customer info***Personal information:*

Username	<a href="#">maryroe</a>
Title	Ms.
First name	Mary
Last name	Roe

*Billing Address:*

Address	PO BOX 1719
City	Chicago
State	Illinois

## Order notes (not visible to customer):

**Important:** Before previewing the order, make sure you've updated the changes by clicking the **Update** button.

## Undoing Changes

If necessary, you can undo unsaved changes and restore the saved state of the order.

To undo the changes, click the **Cancel** button on the Advanced Order Management box. The system displays a confirmation message saying that all the modifications were canceled.

Confirmation
All modifications are cancelled

## Saving Changes

After the order details are modified, you must save the changes to the database. Otherwise the changes will not take effect.

To save the changes to the database:

1. Click the **Save** button on the Advanced Order Management box.

The system will display a message saying that the database is going to be updated and asking to confirm the action.

Advanced Order Management
<b>Order # 1064</b> Date: 20-02-2009 11:19:15
<hr/>
You are going to update this order information in the database. Please confirm this by clicking the link below.
<input type="checkbox"/> Notify customer by email
<a href="#">Yes</a> > <a href="#">No</a> >

2. If you want to send the customer who placed the order a notification about the changes, select the **Notify customer by e-mail** check box.
3. Click the **Yes** button to save the modified order to the database, or click the **No** button to return to the order preview without saving the changes.

**Important:** If you save the changes to the database, you will not be able to undo the changes.

## Deleting Orders

If necessary, you can delete the order and, thus, remove it from the database.

To delete the order:

1. Open the order for editing (see section [Opening Orders for Editing](#)).
2. Click the **Delete order** button on the Advanced Order Management box.

After you click **Delete order**, the system displays a confirmation dialog.

**Advanced Order Management**

**Order # 1064**  
Date: 20-02-2009 11:19:15

---

You are going to delete this order and all related information from the database. Please confirm this by clicking the link below.

[Yes](#)    [No](#)

3. Click the the **Yes** button to delete the order and remove it from the database, or click the **No** button to keep the order in the database and your store order history.

**Important:** If you choose to delete the order, you will not be able to restore it.

## 10.3.2 Editing Ordered Products

X-AOM allows you to add, delete and modify products in an order.

### Editing Product Details

For each product in an order, X-AOM allows you to edit product details including the product price, product options and product quantity.

To edit the product details:

1. Open the order for editing (see section [Opening Orders for Editing](#)).
2. Click on the **Edit ordered products** link on the Advanced Order Management box.

After you click on **Edit ordered products**, X-AOM displays the Order # %order\_number%: edit

products box. The box has the Product info subsection which includes the list of products in the order. For each product, the Product info subsection displays a list of parameters organized in a three-column table. The values of the parameters are displayed in columns Current and Original.

The column Current contains the changed order details which are written to the database after you save the order. The column Original contains the saved order details.

**Order #1064: edit products**

---

**Product info**

**#16129. Short-sleeved poplin shirt**

<input type="checkbox"/> Delete	Current	Original
SKU	SKU16129v	SKU16129v
Provider	master	master
Catalog price	\$34.20	\$34.20
Price	<input style="width: 80px;" type="text" value="34.20"/>	\$34.20
Quantity, item(s)	<input style="width: 40px;" type="text" value="1"/>	1
Available in stock, item(s)	1000	1000
Selected options (already considered in the price)	Color <input style="width: 50px;" type="text" value="White"/> Size <input style="width: 50px;" type="text" value="S"/>	Color: White Size: S

**#89. Tatty Teddy bear**

<input type="checkbox"/> Delete	Current	Original
SKU	SKU89	SKU89
Provider	master	master
Catalog price	\$8.50	\$8.50

---

**Add product**

#

3. Use the editable fields in the column Current to modify the available product details.

- To change the product price, edit the value of the field Price.

**Note:** If you use product options and product variants, the value of the field Catalog price is the price of the default product variant. If the default product variant is not defined, the default product variant completely coincides with the combination of the first valid product options i.e. product options which

are enabled and are not excluded from the available product option combinations.

- To change the product quantity, edit the value of the field Quantity, item(s).
- To change the product options, edit the values in the field Selected options.

**Note:** Changing the values of the product options does not affect the product cost. If the product price depends on the product options, you must re-calculate and enter the product cost manually.

4. Click the **Update** button to save the changes.

## Adding Products

X-AOM allows you to add extra products to the order.

To add a product:

1. Open the order for editing (see section [Opening Orders for Editing](#)).
2. Click on the **Edit ordered products** link on the Advanced Order Management box.

After you click on **Edit ordered products**, X-AOM displays the Order # %order\_number%: edit products box. The box has the Add product subsection.

**Order #1064: edit products**

---

**Product info**

**#16129. Short-sleeved poplin shirt**

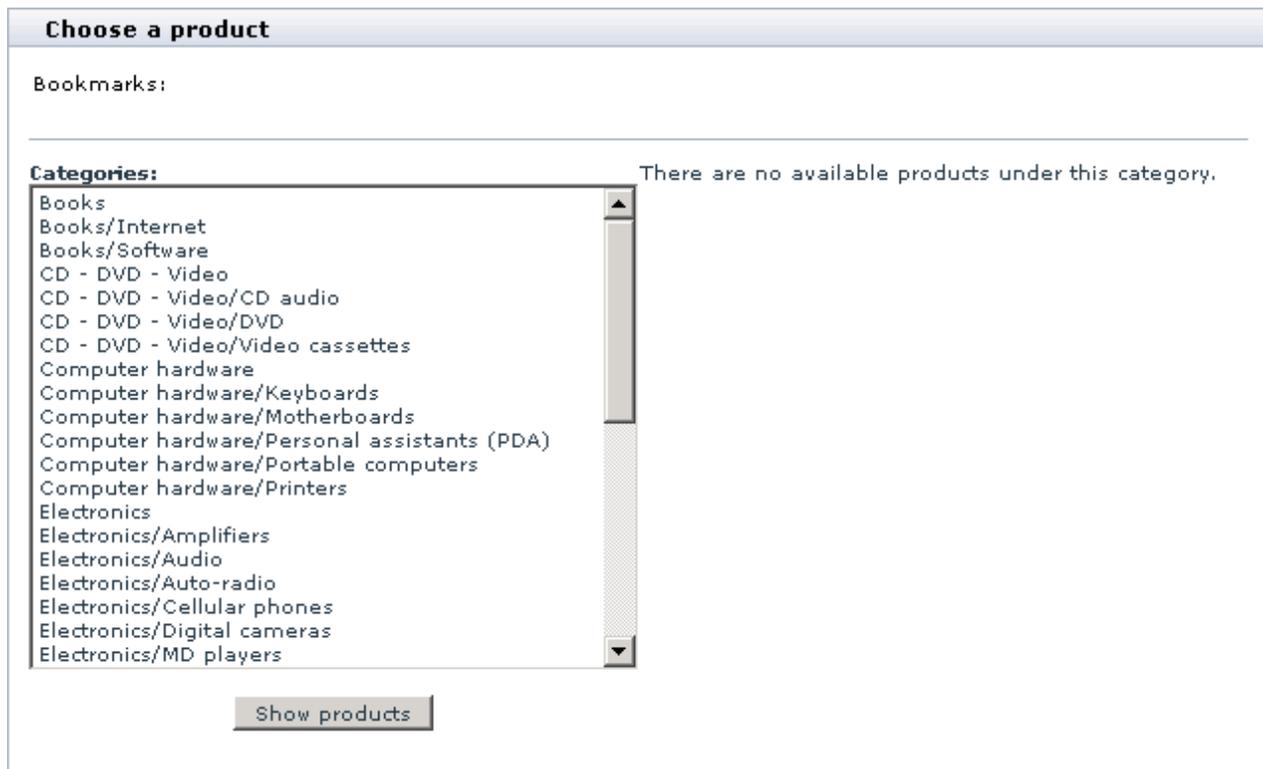
<input type="checkbox"/> Delete	Current	Original
SKU	SKU16129v	SKU16129v
Provider	master	master
Catalog price	\$34.20	\$34.20
Price	<input style="width: 80px;" type="text" value="34.20"/>	\$34.20

---

**Add product**

#

3. Click the **Browse** button to open the Choose a product dialog box.



4. Choose a product category from the list on the left and click the **Show products** button to display the list of products.
5. Select a product and click the **Select** button to add this product to the order.
6. If necessary, you can bookmark several products and add them to the order later.
  - To bookmark a product, select it in the list and click the **Bookmark** button. The bookmarked product will appear in the Bookmarks list at the top of the Choose a product dialog box.
  - To add a bookmarked product to the order, click on the product title in the Bookmarks list.
  - To remove a product from the Bookmarks list, click [**delete**] next to the corresponding product title.

**Choose a product**

Bookmarks:

- [HP LaserJet 2100M + cable 2m](#) [\[Delete\]](#)
- [Panasonic Mini Disc player ...](#) [\[Delete\]](#)
- [Sony ECM-HM1 - Micro](#) [\[Delete\]](#)
- [Motherboard P3APA VIA 694 U...](#) [\[Delete\]](#)

---

Categories:	Products:
<ul style="list-style-type: none"> <li>Books</li> <li>Books/Internet</li> <li>Books/Software</li> <li>CD - DVD - Video</li> <li>CD - DVD - Video/CD audio</li> <li>CD - DVD - Video/DVD</li> <li>CD - DVD - Video/Video cassettes</li> <li>Computer hardware</li> <li>Computer hardware/Keyboards</li> <li>Computer hardware/Motherboards</li> <li>Computer hardware/Personal assistants (PDA)</li> <li>Computer hardware/Portable computers</li> <li style="background-color: #000080; color: white;">Computer hardware/Printers</li> <li>Electronics</li> <li>Electronics/Amplifiers</li> <li>Electronics/Audio</li> <li>Electronics/Auto-radio</li> <li>Electronics/Cellular phones</li> <li>Electronics/Digital cameras</li> <li>Electronics/MD players</li> </ul>	<ul style="list-style-type: none"> <li>HP LaserJet 1200 + cable 2m</li> <li>HP LaserJet 2100M + cable 2m</li> <li>HP LaserJet 2200D + cable 2m</li> </ul>

Show products
Select
Bookmark

7. Click the **Update** button to save the changes.

## Deleting Products

X-AOM enables you to remove products from the order.

To remove products:

1. Open the order for editing (see section [Opening Orders for Editing](#)).
2. Click on the **Edit ordered products** link on the Advanced Order Management box.

X-AOM displays the Order # %order\_number%: edit products box. The box contains the Product info subsection with a list of products in the order.

Order #1064: edit products		
<b>Product info</b>		
<a href="#">#16129. Short-sleeved poplin shirt</a>		
<input type="checkbox"/> Delete	Current	Original
SKU	SKU16129v	SKU16129v
Provider	master	master
Catalog price	\$34.20	\$34.20
Price	<input type="text" value="34.20"/>	\$34.20

3. Select the **Delete** check box for each product that you want to remove from the order.
4. Click the **Update** button to save the changes.

### 10.3.3 Editing Ordered Gift Certificates

X-AOM allows you to remove and edit gift certificates in an order.

#### Editing Gift Certificates

X-AOM enables you to edit gift certificate details.

To edit a gift certificate:

1. Open the order for editing (see section [Opening Orders for Editing](#)).
2. Click on the **Edit ordered Gift Certificates** link on the Advanced Order Management box.

X-AOM displays the Order # %order\_number%: edit Gift Certificates box. The box has a list of ordered gift certificates. For each gift certificate, the box displays columns Current and Original.

The column Current contains the changed gift certificate details which are written to the database after you save the order. The column Original contains the saved gift certificate details.

**Order #1064: edit Gift Certificates**

**Gift certificates**

**Gift Certificate ID #2A8E86F35FD3FB36**

<input type="checkbox"/> Delete	Current	Original
Amount	<input type="text" value="200.00"/>	\$200.00
Recipient	Lynn Smith	Lynn Smith
Recipient's e-mail	lynn.smith@example.com	lynn.smith@example.com

[Update](#) 

3. Edit the gift certificate details.

- If you need to change only the amount of money:
  - a) Edit the value of the field Amount in the column Current;
  - b) Click the **Update** button to remember the changes.
- If you need to change more details including the recipient's name, the sender's name, the delivery method, etc.:
  - a) Click on the link **Gift Certificate ID # %gift\_certificate\_number%**. You are redirected to the general gift certificate management page of the Admin area.

### 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.

\$ \*

**4. Choose a delivery method**

 Enter the e-mail address of the person you are sending the Gift Certificate to.

E-mail \*

b) In the Gift Certificate details box edit the gift certificate details.

c) Click the **Update Gift Certificate** button to save the changes to the database.

You are redirected to the page of the Admin area with the list of all the gift certificates. If necessary, update the status of the certificate there.

**Important:** Since all the changes that are made through the main X-Cart interface affect only the values in the column Original, but not the values in the column Current, you should use either the main X-Cart interface or the X-AOM interface (the Advanced Order Management box), but never use them together. Otherwise the changes made through main X-Cart interface will be overwritten by the X-AOM interface. For example, if you choose to edit the recipient's email address through the main X-Cart interface, and then save the changes through the X-AOM interface, the gift certificate details in the order will have the old email address, because the new email address never appeared in the column Current.

## Deleting Gift Certificates

1. Open the order for editing (see section [Getting Started](#)).
2. Click on the **Edit ordered Gift Certificates** link on the Advanced Order Management box.

X-AOM will display the Order # %order\_number%: edit Gift Certificates box. The box has a list of ordered gift certificates.

**Order #1064: edit Gift Certificates**

---

**Gift certificates**

[Gift Certificate ID #2A8E86F35FD3FB36](#)

<input type="checkbox"/> Delete	Current	Original
Amount	<input type="text" value="200.00"/>	\$200.00
Recipient	Lynn Smith	Lynn Smith
Recipient's e-mail	lynn.smith@example.com	lynn.smith@example.com

[Update](#) 

3. Select the **Delete** check box below the name of gift certificate(s) you want to delete.
4. Click the **Update** button to delete the certificates and save the changes.

### 10.3.4 Editing Customer Information

X-AOM allows you to edit customer information including personal details, billing and shipping addresses, and contact information.

To edit customer information:

1. Open the order for editing (see section [Opening Orders for Editing](#)).
2. Click on the **Edit customer information** link on the Advanced Order Management box.

X-AOM displays the Order # %order\_number%: customer information box. For each field the box contains columns Current and Original.

The column Current contains the changed order details which are written to the database after you save the order. The column Original contains the saved order details.

**Order #1064: edit customer information**

**Customer info**

*Personal information:*

	Current	Original
Title	Ms. ▾	Ms.
First name	Mary	Mary
Last name	Roe	Roe
Membership	Not member ▾	Not member

*Billing Address:*

	Current	Original
Address	PO BOX 1719	PO BOX 1719
City	Chicago	Chicago
State	Illinois ▾	Illinois
Country	United States ▾	United States
Zip/Postal code	60608	60608

*Shipping Address:*

	Current	Original
Address	PO BOX 1719	PO BOX 1719
City	Chicago	Chicago
State	Illinois ▾	Illinois
Country	United States ▾	United States
Zip/Postal code	60608	60608

*Contact Information:*

	Current	Original
Phone	555-0145	555-0145
E-mail	m.roe@example.com	<a href="mailto:m.roe@example.com">m.roe@example.com</a>

[Update](#) >

3. Edit the customer information in the column Current.
4. Click the **Update** button to save the changes.

### 10.3.5 Editing Order Totals

X-AOM allows you to edit the order total by changing the value of components that make up the total including the delivery method, discount savings, etc.

To edit the order totals:

1. Open the order for editing (see section [Opening Orders for Editing](#)).
2. Click on the **Edit customer information** link on the Advanced Order Management box.

X-AOM displays the Order # %order\_number%: edit totals box. For each field the box contains columns Current and Original.

The column Current contains the changed order details which are written to the database after you save the order. The column Original contains the saved order details.

**Order #1064: edit totals**

---

**Order info**

**Note:** All product prices, subtotals and shipping cost are displayed including taxes.

Product	Tax	Price	Quantity	Subtotal
<a href="#">SKU16129v . Short-sleeved poplin shirt</a>	SampleTax 6.25%	\$36.34	1	\$36.34
<a href="#">SKU89 . Tatty Teddy bear</a>	SampleTax 6.25%	\$9.03	1	\$9.03
<a href="#">SKU191 . Baldur's Gate 2 Expansion: ...</a>	SampleTax 6.25%	\$42.50	1	\$42.50
Summary:				<b>\$87.87</b>

Gift certificates:

<a href="#">GC #1</a>	\$200.00	1	\$200.00
Summary:	<b>\$200.00</b>		<b>\$200.00</b>

**Notes:**

- Prices and subtotals are displayed including taxes.
- Discounts are calculated based on prices and subtotals taken without consideration of taxes.

	Current	Original
Payment method	Credit Card (manual process) Other: <input type="checkbox"/> Credit Card	Credit Card (manual processing)
Delivery method	SampleShippingMethod_national (\$2.50)	SampleShippingMethod_national
Subtotal	\$287.87	\$287.87
Discount	\$0.00	\$0.00
Use other discount	<input type="checkbox"/> 0.00 \$	\$0.00
Coupon saving	\$0.00 ( None )	\$0.00
New coupon saving	<input type="checkbox"/> 0.00	
Shipping cost	\$2.50	\$2.50
Use fixed shipping cost*	<input checked="" type="checkbox"/> 2.50	
<b>TOTAL</b>	<b>\$290.37</b>	<b>\$290.37</b>
<b>Including:</b>		<b>Including:</b>
SampleTax 6.25%:	\$5.17	SampleTax 6.25%: \$5.17

[Update](#) >

3. Edit the components in the column Current.

Discounts, taxes and the order total are re-calculated automatically.

**Important:** If the check box **Use fixed shipping cost** is selected and the value of the respective field is

different from the calculated shipping rate, the calculated shipping rate will be replaced by the fixed shipping cost. By default the checkbox is selected and has the same value as the calculated shipping cost. This is done to ensure that the shipping cost for the order would not be changed without the admin's knowing (e.g., if the rate for the method changes, it does not affect the order total. We recommend you keep the checkbox selected. It is a protection against unexpected changing of the shipping cost for the order.

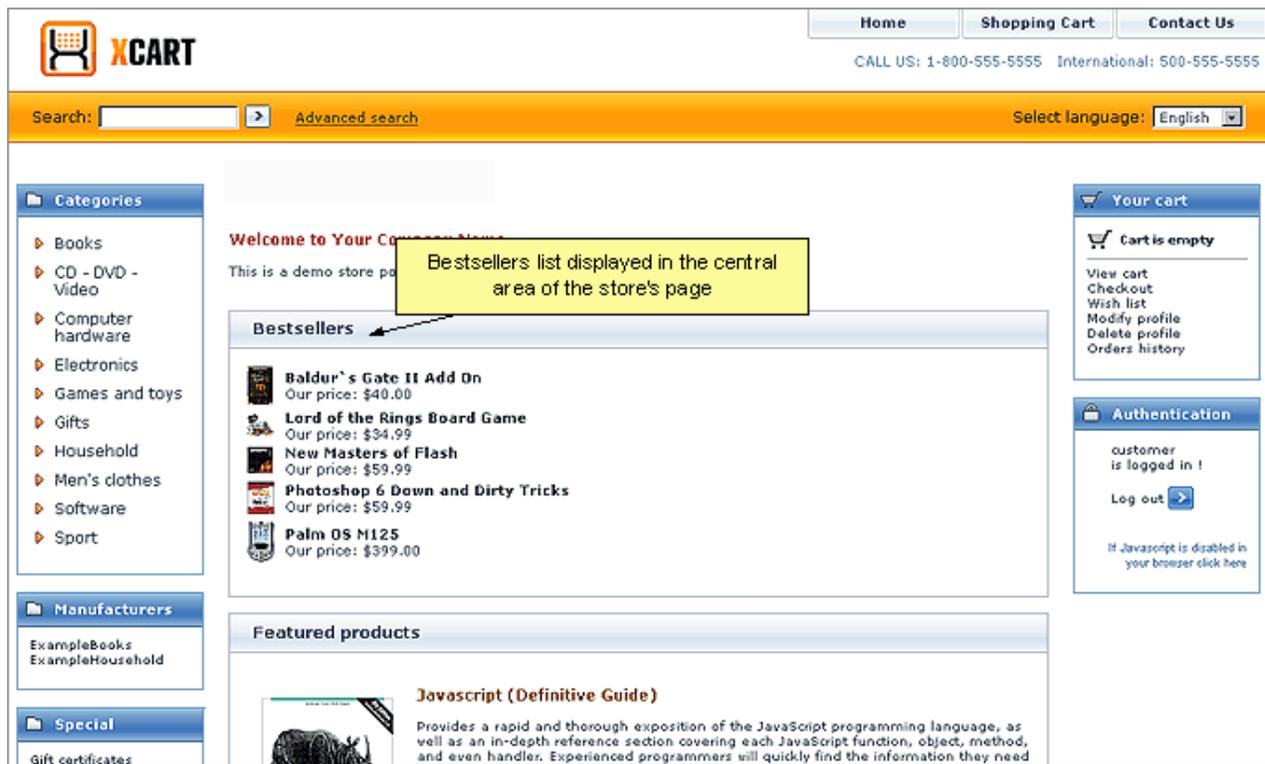
4. Click the **Update** button to register the changes.

## 10.4 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:



or in the sidebar (menu column) of the Customer area:

The screenshot shows the X-Cart v.4.3.0 user interface. At the top, there is a navigation bar with 'Home', 'Shopping Cart', and 'Contact Us' links, and 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 is divided into a sidebar on the left and a main product display area on the right. The sidebar contains sections for 'Categories', 'Bestsellers', 'Manufacturers', and 'Special'. The 'Bestsellers' section is highlighted with a yellow callout box that says 'Bestsellers list displayed in the sidebar (menu column)'. The main product display area shows two products: 'JavaScript' and 'Flash 5 for Windows and Macintosh'. Each product listing includes a title, a description, a market price, an 'Our price' with a discount percentage, a quantity selector, and 'Buy Now' and 'Add to wish list' buttons. The right sidebar contains 'Your cart' (showing 'Cart is empty') and 'Authentication' (showing 'customer is logged in !' and a 'Log out' button).

**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'](#))

### 10.4.1 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

5

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

- 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.
- 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.

- 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.

## 10.5 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 shows the X-Cart storefront for a product named 'Cranium'. At the top, there is a navigation bar with 'Home', 'Shopping Cart', and 'Contact Us' links, along with contact information: 'CALL US: 1-800-555-5555 International: 500-555-5555'. A search bar and a language selector (set to 'English') are also present. On the left, a 'Categories' sidebar lists various product types like Books, CD-DVD-Video, Computer hardware, Electronics, Games and toys, Gifts, Household, Men's clothes, Software, and Sport. The main product area features an image of the Cranium board game, a description: 'The outrageous new board game for your whole brain, containing 14 fun activities giving everyone a chance to shine.', and a 'Details' section with SKU (SKU92), stock (100 items), and weight (1.00 lbs). The price is listed as \$34.99 (€30.44). Below this is an 'Options' section with a quantity dropdown set to '1' and an 'Add to cart' button. On the right, there are two sidebars: 'Your cart' which shows 'Cart is empty' with links for 'View cart', 'Checkout', 'Modify profile', 'Delete profile', and 'Orders history'; and 'Authentication' which shows 'customer is logged in !' and a 'Log out' button. A 'Printable version' link is located above the product details.

The screenshot shows the 'Customer feedback' form. It has a title 'Customer feedback' and a sub-section 'Customer Reviews'. A message states: 'There have been no reviews for this product.' Below this is a section titled 'Add your review here' which contains a form with three fields: 'Your name: \*' with a text input field, 'Product rating: \*' with a dropdown menu currently showing 'Excellent!', and 'Your message: \*' with a large text area. A note below the message field says 'Maximum review length is 2000 characters'. At the bottom of the form is an 'Add review' button. The footer of the page includes '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](#)).

## 10.5.1 Enabling and Configuring 'Customer Reviews'

To begin using the module:

1. Enable Customer Reviews module (Administration menu->Modules).

When the module is enabled, you can see: Customer Reviews options section in General settings/Modules options.

2. Adjust the module settings via General settings/Modules options->Customer Reviews options:

The screenshot shows a web interface for configuring the 'Customer Reviews' module. The form is titled 'General settings' and has a sub-section 'Customer Reviews'. It contains five settings, each with a label, a value field, and a 'Save' button at the bottom left.

General settings	
Customer Reviews	
Enable product ratings	<input checked="" type="checkbox"/>
Enable customer reviews	<input checked="" type="checkbox"/>
Who must be allowed to add reviews and rate products	All users
Rate products without reloading the product list	<input checked="" type="checkbox"/>
Stars in product rating scale	20

Save

- a) Enable product rating: Specify whether you want to enable your customers to rate products: select the check box to enable product ratings, unselect the check box to hide the 'Product rating' section from the 'Customer Feedback' form.
- b) Enable customer review: Specify whether you want to enable your customers to create reviews and view reviews by other customers: select the check box to enable customer reviews, unselect the check box to hide the 'Customer reviews' section from the 'Customer Feedback' form.
- c) Who must be allowed to add reviews and rate products: Specify who can create reviews and rate products: select *All users* or *Registered users* from the select box.
- d) Rate products without reloading the product list: Select the check box to rate products without reloading the page.
- e) Stars in product rating scale: Select the number of stars you want to be displayed as the product rating scale.

f) Click the **Save** button.

## 10.5.2 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! ▼
<input type="button" value="Delete selected"/>		<input type="button" value="Update"/>		

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 ▼
<input type="button" value="Delete selected"/>		<input type="button" value="Update"/>		

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).

## **10.5.3 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	

**Add new review**

---

Then, as your store visitors begin posting reviews, reviews form a list in the upper part of the 'Edit reviews' dialog box:

**Edit reviews**

Check all / Uncheck all

	AUTHOR	MESSAGE
<input type="checkbox"/>	John Smith (j_smith@example.com)	Great item exactly as described, fast delivery. Highly recommended!
<input type="checkbox"/>	Jane Doe (jane_doe@example.com)	Excellent quality!

**Add new review**

---

### Adding customer reviews from the 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 email 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.

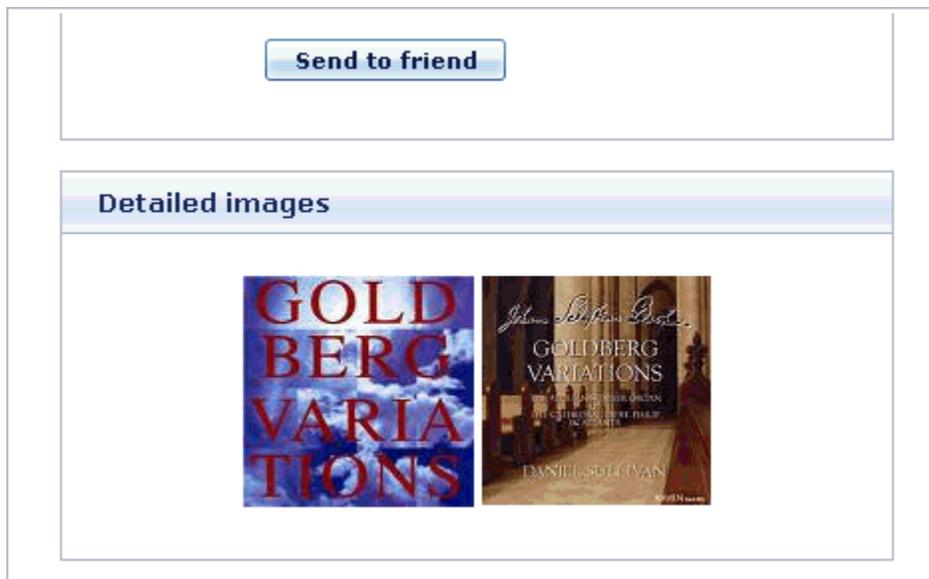
## 10.6 Detailed Product Images

### 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)**

---

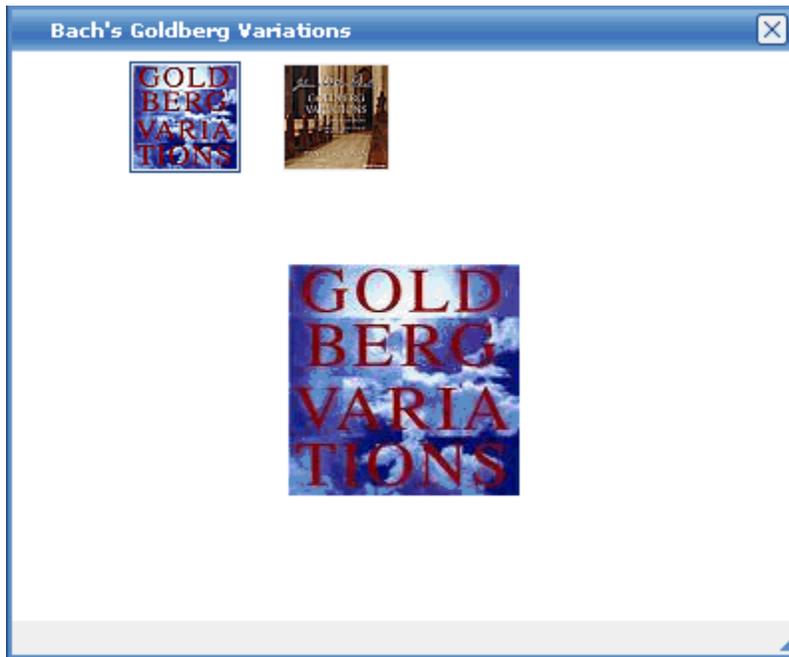
**Options**

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](#)).

## 10.6.1 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.

- Adjust the module settings via General settings/Modules options->Detailed Product Images options:

**General settings**

---

**Detailed Product Images**

Display detailed product images	<input type="text" value="in a popup window"/> <span style="float: right;"><a href="#">Need help?</a></span>
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 style="width: 50px;" type="text" value="0"/>
Maximum width of a detailed product image thumbnail	<input style="width: 50px;" type="text" value="64"/>
Maximum height of a detailed product image thumbnail	<input style="width: 50px;" 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 style="width: 50px;" type="text" value="3"/>

**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.

## 10.6.2 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](#)).

### 10.6.3 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 x 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, 116x116, 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.

## 10.6.4 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.

## 10.7 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](#) 
Checkout

If you have a valid discount coupon, you can enter it below, the store will deduct the discount amount from your total order.

**Redeem a discount coupon**

**Coupon code**

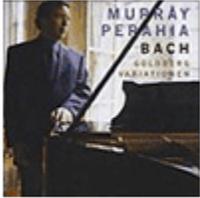
[Submit](#)

After adding all the desired products to the shopping cart, a customer can use this section to enter a coupon code. When a code is entered, X-Cart checks if it is valid and if the order to which the code is being applied meets the requirements defined by the provider. If all is well, the coupon code discount gets applied to the order: the coupon discount amount is subtracted from the order subtotal or, if a global discount is applied, from the result of the subtraction of the global discount from the subtotal. The customer can see the result of application of the discount coupon on the cart page:

**Your shopping cart**

The items below are currently in your shopping cart. To remove any item click "Delete item". To checkout, please click "Checkout". Please note that Delivery method is ignored if you are ordering Gift Certificates or Electronically distributed products.

**Items**



**Bach's 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.

## 10.7.1 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 Management 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"/>			
<p><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.</p>					
<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.

## 10.7.2 Managing Existing Discount Coupons

### Changing discount coupon statuses

To change the status of an existing coupon:

1. Go to the 'Store Coupons' section (Management menu->Coupons). You should see a form titled 'Categories'. Click on Coupons in the Management 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 (Management menu->Coupons).
2. Find the coupon you wish to delete.

3. Select the check box next to it.
4. Click the **Delete selected** button.

## 10.8 Egoods

### What Egoods module does

The Egoods module enables you to sell digital products like software, audio and video files, graphics, etc. that are delivered to customers by download.

When the module is enabled, every Product details page in the Admin and Provider areas contains a special field ESD distribution that enables you to assign a file to a product. After you have specified a file for the product and saved the product details, X-Cart handles this product as a downloadable one: the system does not calculate shipping charges and disables inventory tracking for the product.

Customers can add digital products to their carts and go to checkout in the same manner as if it were ordinary products. After an order, containing such a product, has been processed, X-Cart sends an email notification with a download link to a customer who placed the order. The customer can then follow the link and download the product. Each download link is valid for a limited time, defined by the store administrator. When needed, the store administrator can manually extend the download period.

### 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 (see section [Enabling and Configuring 'Egoods'](#)).
- Upload files for downloadable products to any location in the X-Cart file repository.
- Limit available payment options for orders containing downloadable products.
- Assign files to downloadable products.
- Extend expired download links.

If you are an X-Cart PRO provider, you can:

- Upload files for downloadable products to a personal location within the X-Cart file repository.
- Assign files to downloadable products.

## 10.8.1 Enabling and Configuring 'Egoods'

### Enabling Egoods module

Before you can start creating downloadable products you must enable the Egoods module in the X-Cart Admin area.

To enable the module:

1. Log in to the Admin area.
2. Go to the Modules section (Administration menu -> Modules).
3. Select the check box for the entry **Egoods**.
4. Click the **Update** button at the bottom of the page.

Modules		
<input checked="" type="checkbox"/>	Advanced Statistics	When this module is enabled your shop gathers advanced statistical data. <a href="#">Configure</a>
<input checked="" type="checkbox"/>	Egoods	Activate this module if you wish to sell Electronically distributed products.
<input type="checkbox"/>	Extra Fields	If enabled, extra fields can be added to the product table.
<input checked="" type="checkbox"/>	Wishlist	This module enables the Wish list feature for registered customers. <a href="#">Configure</a>
<input type="button" value="Update"/>		

### Configuring Egoods module

To configure the module:

1. Log in to the Admin area.
2. Go to the General settings section (Settings menu -> General settings).
3. Click on the **Egoods** link (General settings/Modules options). You will be redirected to the Egoods configuration page.
4. Use the Egoods form to adjust module settings.

General settings	
<b>Egoods</b>	
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>
Allow customers ordering egoods to use only payment methods that require manual processing or online payment methods working in 'Auth only' mode.	<input type="checkbox"/>
<input type="button" value="Save"/>	

- **Download key TTL (hours):** The number of hours after a download key was sent to a customer, during which the key is valid and the customer can download the product.

- **Disable online payment methods for orders containing egoods:** Use this option to disable all online payment methods in your store if an order contains a downloadable product.

If you select this check box, online payment methods will be disabled, and customers who buy downloadable products in your store will be able to pay through offline payment methods only. (Remember to activate at least one offline method).

If you leave this check box unselected, customers who buy downloadable products in your store will be able to pay, using any active payment method.

- **Allow customers ordering egoods to use only payment methods that require manual processing or online payment methods working in 'Auth only' mode:** Use this option to disable all payment methods in your store except those that require manual processing or support the "auth only" mode, if an order contains a downloadable product.

If you select this check box, customers who buy downloadable products in your store will be able to pay through those payment methods that require manual processing or support the "auth only" mode.

If you leave this check box unselected, customers who buy downloadable products in your store will be able to pay, using any active payment method.

**Important:** If you choose to enable only those payment methods that require manual processing or support the "auth only" mode, remember to leave the Disable online payment methods for orders containing egoods check box unselected. Otherwise online payment methods, supporting the "auth only" mode will also be disabled.

5. Click the **Save** button.

## 10.8.2 Managing Product Files

### Arranging file location

Files for downloadable products can be physically located either on the same server as your copy of X-Cart, or on a different server. The recommended option is to store files on the same server. This way of arranging the file repository has the following advantages:

- The store does not depend on other servers, which may be temporary down, and individual URLs, which may be broken;
- Incoming and outgoing traffic is spent more efficiently;
- Customers can download files faster;
- Files can be assigned to products by simple browsing;
- Files can be uploaded to the file repository directly from the X-Cart Admin and Provider areas.

However, for some reason or another, you may have to keep some files on a different server. In such a situation, make sure that the files on the other server(s) can be freely accessed through the internet, e.g. a firewall will not reject the connection, etc.

When storing files on the same server, a default location for the file repository is the directory `/files` in the X-Cart root directory. Depending on the number of store providers, the directory may contain one or more folders. Each of these folders keeps files uploaded by the respective provider only. Other providers cannot use these, while store administrators can access all the files and folders within the `/files` directory. You can upload files to the directory (or its subdirectories) through the X-Cart Admin and Provider areas, or you can upload them in bulk via FTP, SCP or other suitable facility. For instructions on how to upload files through the X-Cart interfaces, refer to the [Files](#) section of this manual.

If necessary, you can assign the file repository to a different directory within the X-Cart root. You can do it by editing the main X-Cart configuration file `config.php`.

**Important:** When assigning the file repository to a different directory, you need to transfer/copy the files and folders from the original directory to the new directory manually using the available file management facilities. Otherwise the structure and content of the original directory will be lost.

To change the default file repository location:

1. In the X-Cart root directory, locate the file `config.php` and open it for editing with your favorite plain text

editor.

2. Change the values of variables `$files_dir` and `$files_webdir`.

a) Find the following lines.

```
$files_dir = "/files";  
$files_webdir = "/files";
```

b) Replace the directory name, which is enclosed in quotation marks, with the name of the new directory.

**Important:** The values of the variables `$files_dir` and `$files_webdir` start from forward slash ( / ), which means that the path is relative to the X-Cart root directory. Remember to keep the slash when changing the value of the variables.

For example, if you want to store files in the directory called "download", edit the values as follows.

```
$files_dir = "/download";  
$files_webdir = "/download";
```

3. Save the changes.

## Protecting files

It is important to protect files for downloadable products from unauthorized access. The directory `/files`, a default X-Cart location for the file repository, already has correct permissions and is set up to protect its contents. If you keep files in a different directory (regardless of its actual location), make sure the directory is well protected. On an Apache-based server use an `.htaccess` file. On an IIS server use the Access permissions dialog box.

For more information on how to protect files and directories, refer to the documentation for the server you use.

## 10.8.3 Handling Products and Orders

### Adding downloadable product

Adding a downloadable product is very similar to adding an ordinary product, which is described in the [Adding Products](#) section of this manual. The only difference regarding downloadable products is that you must also assign a file to a product using the ESD distribution field in the Product details form in the Admin/Provider area.

To assign a file to a product:

1. Create, import or clone a product as described in the [Adding Products](#) section of this manual.
2. At the Product details page, locate the field ESD Distribution.

**Product details**

---

**Details**

**SKU:**

**Product name\* :**

**Clean URL:**

**Search keywords:**

**ESD distribution:**

Default editor [WYSIWYG editor](#)

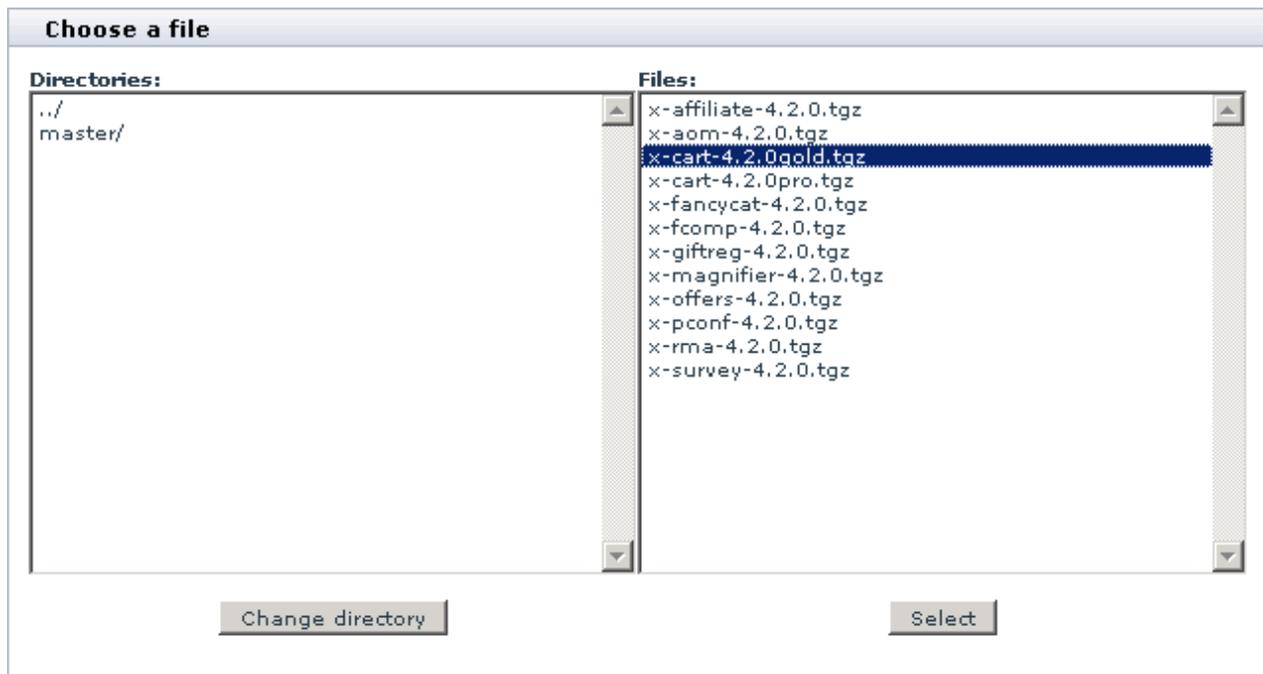
**Short description\* :**

3. Assign a file to the product.

*If the file repository is in the X-Cart root directory (by default the directory /files )*

- a) Make sure the file is uploaded to the file repository.
- b) Click the **Browse...** button.

You will see a form that enables you to select a file.



- c) If necessary, change the directory.
- d) Select the required file from the list and click the **Select** button.

*If the file repository is outside the X-Cart root directory, or the file is located on a different server*

- a) Make sure you know the correct URL of the file.
- b) Put the absolute URL of the file into the the ESD Distribution field.

For example, if X-Cart is installed to the directory `public_html/xcart/` while the files for downloadable products are located in the directory `public_html/download/`, the URL must look like `http://www.example.com/download/product_filename` where `product_filename` is the name of the file, assigned to the product.

4. Click the **Save** button.

## Processing orders

Your store customers can pay for downloadable products, using any of the available payment options, including both online and offline methods.

A few minutes after an order with a downloadable product has been processed, a customer, who placed the order, receives an email message with a download key (a link like `http://www.example.com/xcart/download`.

`php?id=920e98f7d889eb7781a`). The customer must then follow the link and download the product before the key has expired. The expiration period, which is also referred to as TTL (time to live), is defined by the store administrator on the module's configuration page. The TTL countdown for a download key begins immediately after the order has been processed and X-Cart sent a message with the key.

An order is considered to be processed after its status has been changed to "Processed". Order statuses can be changed either manually by the store administrator or automatically according to a response that X-Cart receives from a payment gateway, which actually processes online payments. For a more detailed description of how X-Cart handles orders and order statuses, refer to the [Orders](#) section of the manual.

Due to the specificity of how digital products are delivered, the Egoods module enables you to have more control of how orders with digital products are processed: You can disable all online payment methods, which mostly provide for automatic order processing; or you can choose to enable only those payment methods that require manual processing or have the "auth only" mode. The "auth only" option means that a payment gateway does not really withdraw the order total from a customer's credit card, but it only checks whether the sum is available and temporarily freezes this money until a later time, which is limited by the terms and conditions of the payment gateway. The store administrator can then either capture the authorized amount or void it. As soon as the reserved money is captured, the order gets processed and X-Cart sends a download key to the customer.

This way of processing orders that contain downloadable products, as well as using other methods that require manual order processing, allows you to filter suspicious and potentially fraudulent orders and approve only trustworthy purchases.

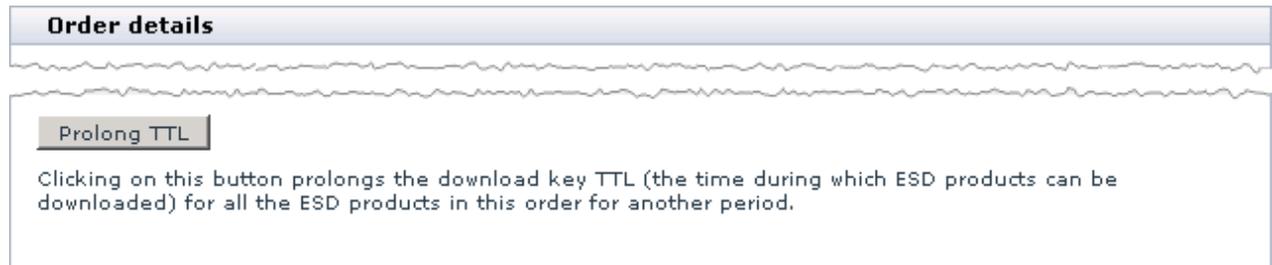
**Important:** X-Cart does not automatically change the order status, depending on whether the product has been downloaded or not, as X-Cart does not track that kind of customer activities.

## Extending download period

If necessary, the store administrator can extend the download period for products by prolonging the TTL (time-to-live) limit of download keys.

To prolong the TTL limit of a key:

1. Log in to the Admin area.
2. Open the order details page for the order that contains the download key you want to prolong.
3. Click the **Prolong TTL** button at the bottom of the Order details form.



Clicking on **Prolong TTL** will extend the download period of *all* downloadable products in the order for another period. The length of the period is defined by the store administrator at the module's configuration page. For details, see the [Enabling and Configuring 'Egoods'](#) section of this manual.

## 10.9 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.

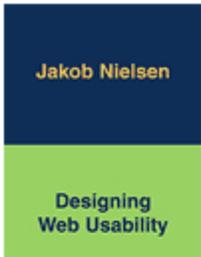
For example, the module can be used to add 'Author' or 'ISBN' fields to a product that is a book:

**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** (highlighted box with arrows pointing to ISBN and Author 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 Settings -> 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](#)).

### 10.9.1 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):

The screenshot shows a dialog box titled 'General settings' with a sub-section 'Extra fields'. It contains a text input field for 'Extra fields limit (per provider)' with the value '10'. Below it is a checkbox labeled 'Display default values in all extra fields for which non-default values have not been defined:' which is checked. A 'Save' button is located at the bottom left.

Click the **Save** button.

## 10.9.2 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':

The screenshot shows a dialog box titled 'Extra fields'. It contains a table with the following columns: FIELD NAME, SERVICE NAME, DEFAULT VALUE, SHOW, and ORDERBY. The table is currently empty, with the text 'No extra fields defined' centered below it. Below the table is a section titled 'Add extra field' with a red underline. This section contains a text input field for 'FIELD NAME', a dropdown menu for 'SERVICE NAME' with 'SERVICE\_NAME1' selected, a text input field for 'DEFAULT VALUE', a checked checkbox for 'SHOW', and an empty text input field for 'ORDERBY'. An 'Add new' button is located at the bottom left.

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_NAME1		<input checked="" type="checkbox"/>	1
<input type="checkbox"/>	ISBN	SERVICE_NAME1		<input checked="" type="checkbox"/>	2

**Add extra field**

---

SERVICE\_NAME1

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.

### 10.9.3 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.

## 10.9.4 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.

## 10.9.5 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).

## 10.10 Fast Lane Checkout

### What Fast Lane Checkout module does

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

When the Fast Lane Checkout module is enabled, the checkout procedure consists of four steps: 'Your cart', 'Personal details', 'Shipping and payment', and 'Place order'.

When a customer who is not logged in or registered, clicks the **Buy now** button, he can view his cart and select whether he wants to continue shopping or proceed to checkout.

[Continue shopping](#)[Checkout →](#)

### Your shopping cart

The items below are currently in your shopping cart. To remove any item click "Delete item". To checkout, please click "Checkout". Please note that Delivery method is ignored if you are ordering Gift Certificates or Electronically distributed products.

#### Items

	<b>Bach's Goldenberg Variations</b> <b>Composer:</b> Johann Sebastian Bach <b>Performer:</b> Murray Perahia
	\$13.99 x <input type="text" value="1"/> = <b>\$13.99</b> (€ 12.17)
	<a href="#">Delete item</a> >
<b>SUBTOTAL: \$13.99</b> (€ 12.17)	
<a href="#">Update</a> >	<a href="#">Clear cart</a> >
<a href="#">Checkout</a>	

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><input type="submit" value="Submit"/></p> <p><a href="#">Recover password</a> &gt;</p>	<p><b>New customer? <a href="#">Click here to register</a></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><u>Shipping Address</u></b></p> <p>10 Main street Fillmore Oklahoma United States 84631</p> <p><b>Modify</b> </p>	<p><b><u>Delivery method</u></b></p> <p><input checked="" type="radio"/> test_national - 10-15 days (\$1.00)</p>
<p><b><u>Billing Address</u></b></p> <p>10 Main street Fillmore Oklahoma United States 84631</p> <p><b>Modify</b> </p>	<p><b><u>Payment method</u></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>



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).

## 10.11 Flyout Menus

### What Flyout Menus module does

The module changes the default categories menu in the Customer area by introducing a collapsible menu style. This improves the navigation through your product catalog and enhances the experience of your store visitors, who can now reach a particular subcategory in one click without having to reload pages several times. Along with the new navigation opportunities, the module introduces a few improvements regarding the look and feel of the menu: now you can furnish menu items with category icons, deprecate empty categories, show tooltips with the number of included products and subcategories, etc.

The picture below shows you an example of how the Flyout Menus module can modify the default categories menu.



**Important:** If you are using a different skin from the original X-Cart distribution package, the new collapsible menu will precisely match the rest of the store design. However, if you are using a third-party skin or have a custom design applied, you may need to edit the files that constitute the menu accordingly.

### 10.11.1 Enabling and Configuring 'Flyout Menus'

This section provides instructions on how to enable and configure the Flyout Menus module in an X-Cart based store.

#### Enabling Flyout Menus

To enable the module:

1. Log in to the X-Cart Admin area and go to the Modules section (Administration menu -> Modules).
2. In the list of modules, find the entry "Flyout Menus" and select the corresponding check box.
3. Scroll down to the bottom of the page and click the **Update** button to apply the changes.

After you have updated the list of active modules, the Configure link will appear next to the module name, meaning that the module is enabled. Use this link to go to the Flyout Menus configuration page and setup the module.

## Configuring Flyout Menus

To configure the module:

1. Log in to the X-Cart Admin area and go to the Flyout Menus settings page.

To reach the configuration page use one of the methods below.

- Go to the section General settings/Flyout Menus (Settings menu -> General settings).
- Go to the list of modules (Administration menu -> Modules) and click on the Configure link that corresponds to the entry "Flyout Menus".

You will see a box with a number of options and settings for the Flyout Menus module.

### General settings

#### Flyout Menus

---

Cache the menu  [Need help?](#)

#### Skin options

Collapsible menu style

Show icons for categories

Show category triangles

Deprecate empty categories

Enable word wrapping for long category names

Show number of products in category

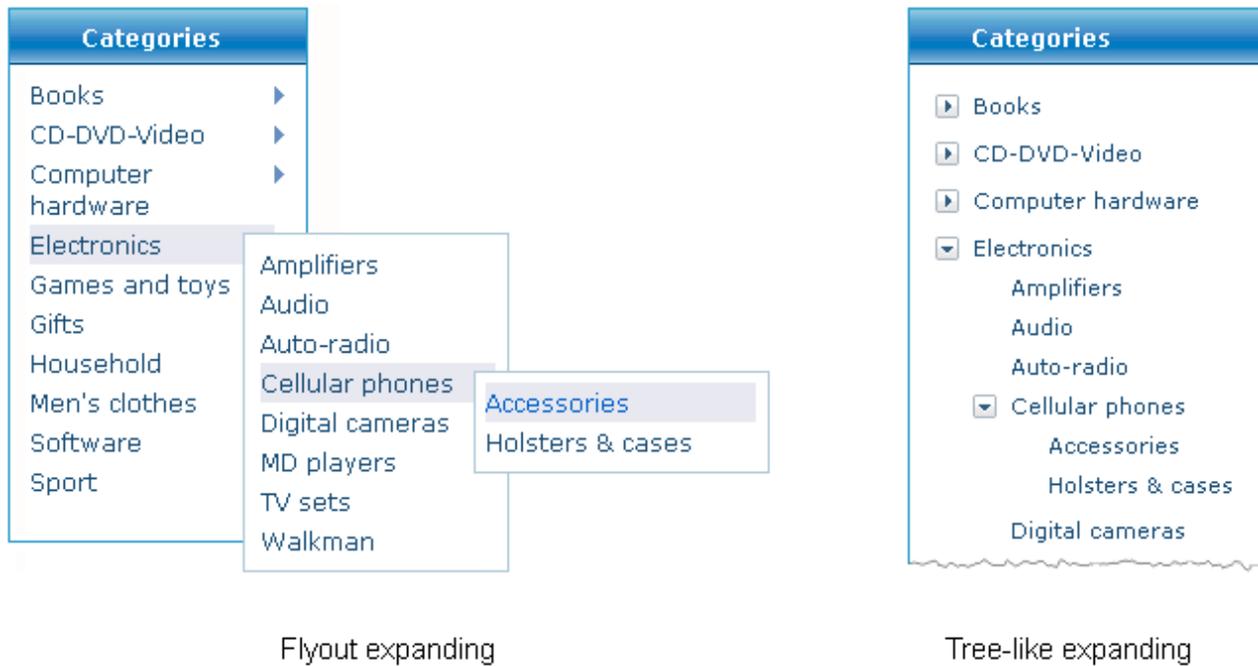
Depth of menu levels (1-9)

2. Adjust the module settings. The meaning and purpose of fields are described below.

- **Cache the menu:** Select to cache the whole category tree of the menu. This will decrease the menu's response time and reduce the load on your MySQL server since the cache will keep the whole category structure and X-Cart won't have to retrieve the same data from the database each time your store visitors use the menu.

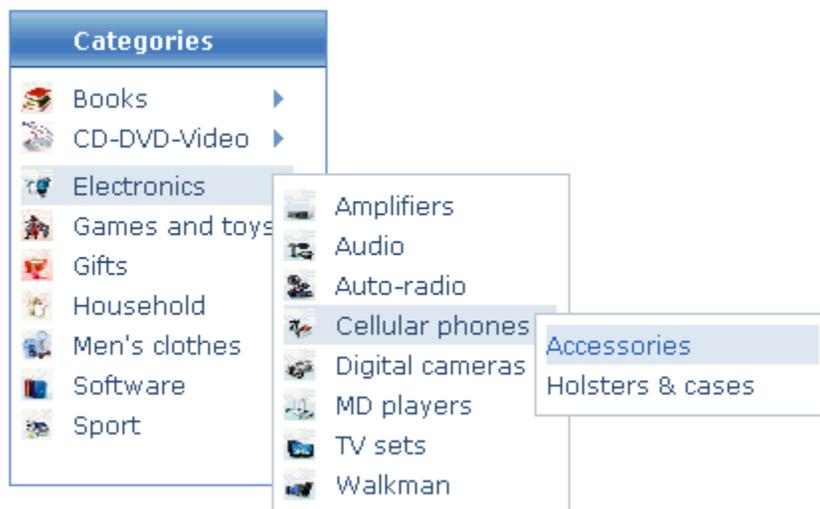
#### Current skin options

- **Collapsible menu style:** Choose the style of the collapsible menu, i.e. the way how the menu should expand. The two available styles are *Flyout expanding* and *Tree-like expanding*. Examples of the both types of menus are shown in the picture below.



- Show icons for categories: Choose the number of menu levels that should be furnished with a category icon (if any). You can choose to show icons for categories of level 1 only (root categories) or for subcategories of deeper levels down to level 9. Or you can choose to show no category icons at all. To display no icons, select *none* from the drop-down box.

In the example below, menu items are furnished with category icons down to level 2.



**Note:** An icon is assigned to a category on the category management page in the Admin area. If there is no icon assigned to a particular category, the respective menu item will not have an icon either. For

instructions on how to edit category attributes and assign a category icon, refer to the [Managing existing categories](#) section earlier in this manual.

- Show category triangles: Select to display a tiny triangle next the names of categories that include subcategories. Categories that do not contain subcategories will not be furnished with a triangle. Having this option activated would help your store visitors to navigate through your category tree better.



- Deprecate empty categories: Select to shade menu items for empty categories, i.e. the categories that contain neither subcategories nor products.



- Enable word wrapping for long category names: Select to carry whole words from category names over to the next line if a certain name is too long to fit the menu's length. Or leave it unselected to always show category names in one line, no matter how long they are.



- Show number of products in category: Select to show the number of products in a category next to the category's name.



- Depth of menu levels (1-9): Enter the maximum number of menu levels that should be included into the collapsible menu. The value you enter here must be from 1 to 9.

## 10.12 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](#)).

## 10.12.1 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.

## 10.12.2 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

Filename

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.

## 10.13 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).

**Gift certificate**

Gift certificates are the perfect solution when you just can't find the right gift or you're short of time. Gift Certificates make a perfect present for friends, family, and business associates.

**Gift certificate verification**

If you have a Gift certificate, you can

Gift certificate:

**Gift Certificate details**

**1. Who are you sending this to?**  
The gift certificate will include the sender's name, the recipient's name and a message.

From \*

To \*

**2. Add a message**  
Enter the text that the recipient will see in the e-mail

Message

**3. Choose an amount**  
Specify the amount in currency.

**Your cart**

Cart is empty

View cart  
Checkout  
Wish list  
Modify profile  
Delete profile  
Orders history

**Authentication**

customer is logged in !

Log out

If Javascript is disabled in your browser click here

As soon as the task of configuring the gift certificate is finished, the customer adds the certificate to the shopping cart and orders it as if it were a regular product.

After the order with the gift certificate gets processed, the certificate is activated and sent to the recipient specified by the certificate purchaser.

The recipient then uses the code specified in the gift certificate to redeem the gift certificate - that is to say, to pay for any order in your store by the gift certificate (*fully* - if the amount on the gift certificate equals or exceeds the total amount of the order, or *partially* - if the amount on the gift certificate is smaller than the total amount of the order).

**Note:** The only limitation is that orders containing nothing but gift certificates cannot be paid for by a gift certificate.

To redeem a gift certificate, a person simply needs to select 'Gift Certificate' as a method of payment on checkout:

Search:  [Advanced search](#) Select language: English

**Categories**

- ▶ Books
- ▶ CD - DVD - Video
- ▶ Computer hardware
- ▶ Electronics
- ▶ Games and toys
- ▶ 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**

**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

**Gift Certificate information**

Gift certificate \*

Notes

Customer notes:

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

[Submit order](#)

**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

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.

**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.

**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).

## 10.13.1 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.

### 10.13.2 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:

- 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):



- 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 email/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*.

### 10.13.3 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, 'email' - 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 email'.

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.

## 10.13.4 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`.

## 10.14 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'](#)).

### 10.14.1 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-xxxxxx-x");
```

The value replaced by "UA-xxxxxx-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.

## 10.15 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'](#)).

## 10.15.1 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.

## 10.15.2 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.

### 10.15.3 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.

## 10.15.4 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.

## 10.15.5 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).

## 10.15.6 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 email 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 email 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 email 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.

## 10.16 Greet Visitor

### What Greet Visitor module does

This module greets your customers by the name when they return to your store website.

The screenshot shows the X-Cart storefront. 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 and a language selector (English) are also present. On the left, there is a 'Categories' sidebar 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 visible. The main content area features a personalized welcome message: 'Welcome back, John Smith' with a callout box stating 'When a registered user returns to the store, he or she is greeted by the name'. Below this, it says 'This is a demo store powered by X-Cart.' The 'Featured products' section displays 'Javascript (Definitive Guide)' with a price of \$39.50 (save 1% from \$39.99) and a 'Buy Now' button. On the right, there are sections for 'Your cart' (Cart is empty) and 'Authentication' (customer is logged in, Log out button).

**Note:** Greet Visitor module does not work if http:// and https:// domains are different. For example, **http://www.example.com** and **https://www.example.myhosting.com**. For the correct module operation both the protocol (http or https) and the domain (www.example.com and example.myhosting.com) parts must match.

### Roles in Greet Visitor module management

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

- You can enable/disable the module Greet Visitor via the Modules section of X-Cart Admin area (Administration menu->Modules).

## 10.17 HTML Editor

### What HTML Editor module does

The module enables you to use a built-in WYSIWYG editor to compose and edit descriptions that appear in the Customer area. Such texts can include product and category descriptions, manufacturers details, store news, etc. Besides, the WYSIWYG editor can be used to edit language variables that are used in all types of X-Cart interfaces: Customer area, Admin area, Provider area and Partner area.

When the module is activated, the fields that support the WYSIWYG mode have a special link [WYSIWYG editor](#) that switches the field to the WYSIWYG mode.



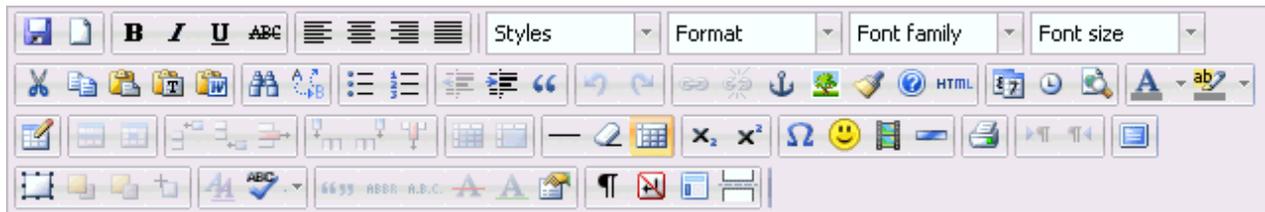
In the the WYSIWYG mode you can edit the contents of the field using the controls on the editor's toolbar. The exact set of controls would depend on the editor you use. Currently X-Cart is integrated with a few third-party WYSIWYG editors, which are TinyMCE, CKeditor and InnovaEditor.

**Note:** X-Cart turns InnovaEditor off when a non-supported browser is used.

Only the following browsers are supported:

- MS Internet Explorer >ver.5.x
- Netscape >ver.8.x
- Firefox >ver.1.x
- Mozilla >ver.1.x
- Opera >ver.9.x

The look and feel of the three editors is shown in the picture below.



TinyMCE



CKEditor



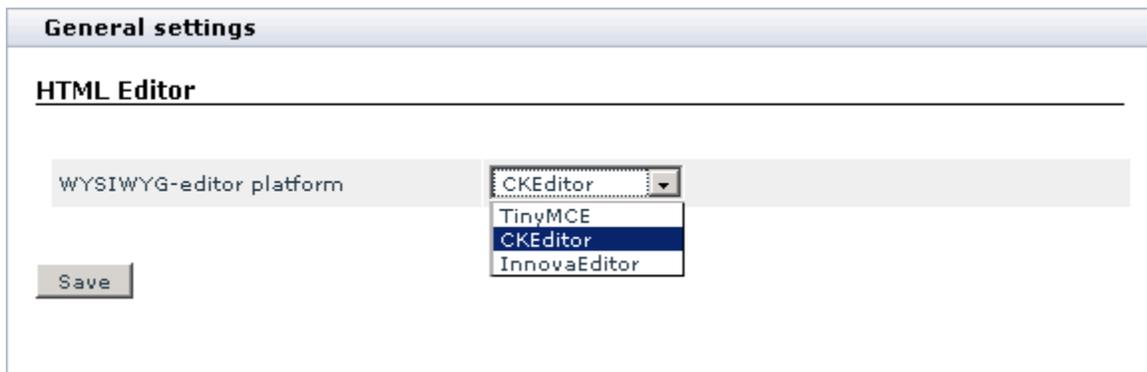
InnovaEditor

## Selecting a WYSIWYG editor

To select a WYSIWYG editor:

1. Log in to the X-Cart Admin area and go to the Modules section (Administration menu -> Modules).
2. In the list of modules, find the entry "HTML Editor" and click on the Configure link next to the modules name.

This will open a new screen.



The screenshot shows a web interface titled "General settings" with a sub-section "HTML Editor". Below the title, there is a label "WYSIWYG-editor platform" next to a dropdown menu. The dropdown menu is open, showing four options: "CKEditor", "TinyMCE", "CKEditor", and "InnovaEditor". The second "CKEditor" option is highlighted. To the left of the dropdown menu is a "Save" button.

3. Select an editor from the **WYSIWYG-editor platform** drop-down box.
4. Click the **Save** button to apply the changes.

## 10.18 Image Verification

### What Image Verification module does

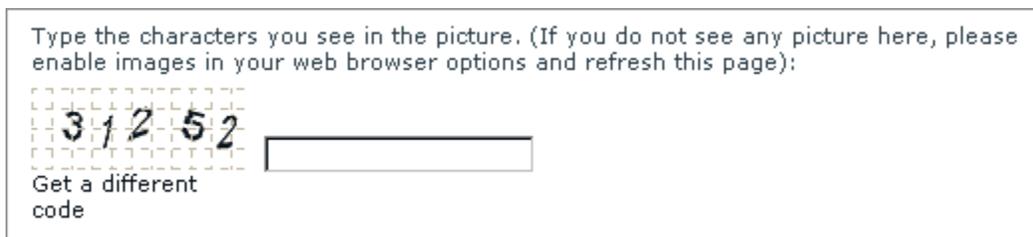
X-Cart's Image Verification module is a solution designed to prevent automated form submissions in your store. The problem of automated submissions is caused by spam robots (spambots) - software programs that impersonate human beings and imitate their online activities for various malicious purposes. 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:



Type the characters you see in the picture. (If you do not see any picture here, please enable images in your web browser options and refresh this page):

31252

[Get a different code](#)

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'](#)).

## 10.18.1 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.

## 10.19 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'](#)).

## 10.19.1 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:

General settings	
<b>Interneka</b>	
Enter your Interneka ID:	<input type="text"/>
Check this to enable 'per Sale, %' payment model:	<input checked="" type="checkbox"/>
Check this to enable 'per Lead, \$' payment model:	<input checked="" type="checkbox"/>
<input type="button" value="Save"/>	

- 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.

## 10.20 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'](#))

## **10.20.1 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:	<div style="border: 1px solid gray; padding: 5px;">           Database operations            File operations            Order-related operations            Product-related operations            Errors in receiving realtime shipping rates            Online payment processing errors            PHP errors            SQL errors            Environment changes            Debug messages         </div>
Include site visits statistics into periodic e-mails:	<input checked="" type="checkbox"/>
Include orders statistics into periodic e-mails:	<input checked="" type="checkbox"/>

- a) Use the field 'Periodic sending of emails 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 email 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.

## 10.21 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):



or be hidden under the Manufacturers link of the Special menu:

Home Shopping Cart Contact Us

CALL US: 1-800-555-5555 International: 500-555-5555

Search:  [Advanced search](#) Select language:

**Categories**

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

**Special**

- Manufacturers
- Help

Contact us  
Privacy statement  
Terms & Conditions

**Welcome to Your Company Name**

This is a demo store powered by X-Cart.

**Featured products**

**Javascript (Definitive Guide)**

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 to start writing JavaScript programs.

Market price: ~~\$39.99~~  
Your price: **\$39.50** (€ 34.37), save 1%

Quantity

**Buy Now**

**Flash 5 for Windows and Macintosh**

I am fonder of Macromedia Flash than just about any tool, and I feel much the same way about Peachpit's Visual QuickStart Guide as the idea of a Visual QuickStart

**Your cart**

Cart is empty

View cart  
Checkout  
Wish list  
Orders history

**Authentication**

Username

Password

**Log in** **Register**

[Recover password](#)

If Javascript is disabled in your browser click here

Manufacturers menu hidden under a link 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 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 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.
- Product Page:** The main focus is on the 'ExampleBooks' manufacturer. It features a product titled 'New Masters of Flash' with a book cover image. The product description states: '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 price information shows a market price of \$70.00 and a current price of \$59.99 (€ 52.19), representing a 25% discount. A quantity selector is set to 1, and a 'Buy Now' button is present.
- Your cart:** A section indicating that the cart is empty, with 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.

## 10.21.1 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:

The screenshot shows a 'General settings' dialog box with a 'Manufacturers' section. It contains three input fields and a 'Save' button. The first field is 'Manufacturers list limit (leave empty if unlimited):' with a value of '10'. The second field is 'Show manufacturers list in the menu column:' with an unchecked checkbox. The third field is 'Manufacturers per page:' with a value of '25'.

Field Name	Value
Manufacturers list limit (leave empty if unlimited):	10
Show manufacturers list in the menu column:	<input type="checkbox"/>
Manufacturers per page:	25

Save

- a) Use the 'Manufacturers list limit (leave empty if unlimited)' field to specify the maximum number of manufacturer categories which can appear in the Manufacturers menu (If the number of manufacturer categories in your store is greater than this limit, all the manufacturer categories beyond this limit will be concealed under the Other manufacturers... link.
- b) If you wish your manufacturer categories to be displayed in the Manufacturers menu of the Customer area sidebar, select the 'Show manufacturers list in the menu column' check box.
- c) Use the 'Manufacturers per page (admin)' field to specify the maximum number of manufacturers which can be displayed on one page in the 'Manufacturers list' dialog box in the Admin area.
- d) Click the **Save** button.

## 10.21.2 Adding Manufacturers

To add a manufacturer category:

1. Open the 'Manufacturers' section of the store's back end: click on Manufacturers in the Catalog 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.

### 10.21.3 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.

## 10.21.4 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.

## 10.21.5 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.

## 10.21.6 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 three main sections: 'Product thumbnail', 'Classification', and a 'Save' button at the bottom.

- Product thumbnail:** This section includes a label 'Thumbnail (recommended size 50x50-150x150)', a placeholder box containing the text 'No image Available', and a 'Change image' button.
- Classification:** This section contains several fields:
  - Main category:** A dropdown menu currently showing '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' field.
  - Manufacturer:** A dropdown menu currently showing 'Manufacturer is not specified'.
  - Availability:** A dropdown menu currently showing 'Available for sale'.
- Save:** A button located at the bottom center of the form.

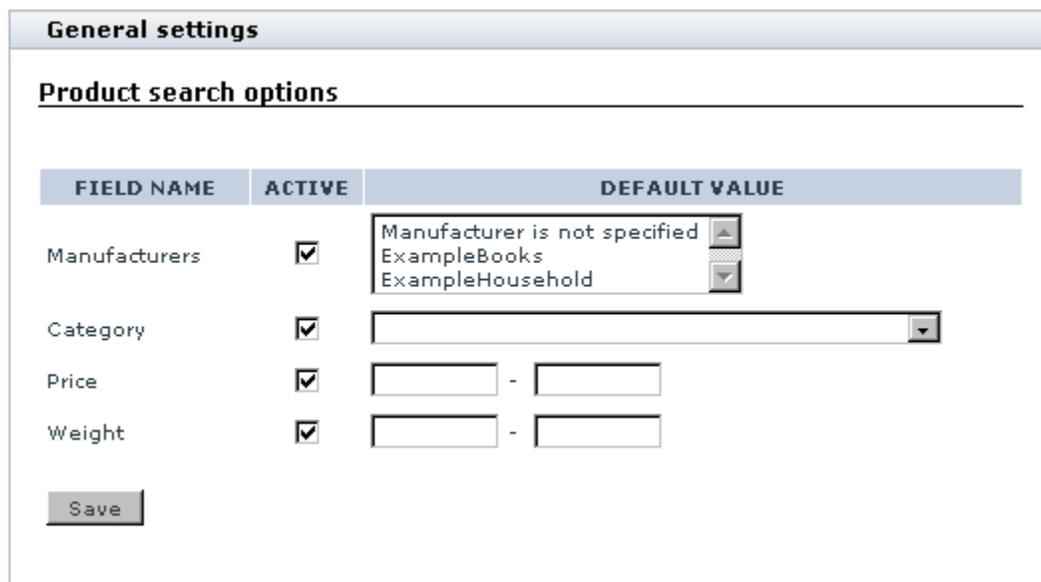
3. Click the **Save** button.

The product should be assigned to the selected manufacturer category and added to this manufacturer category on the storefront.

## 10.21.7 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.

## 10.22 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):

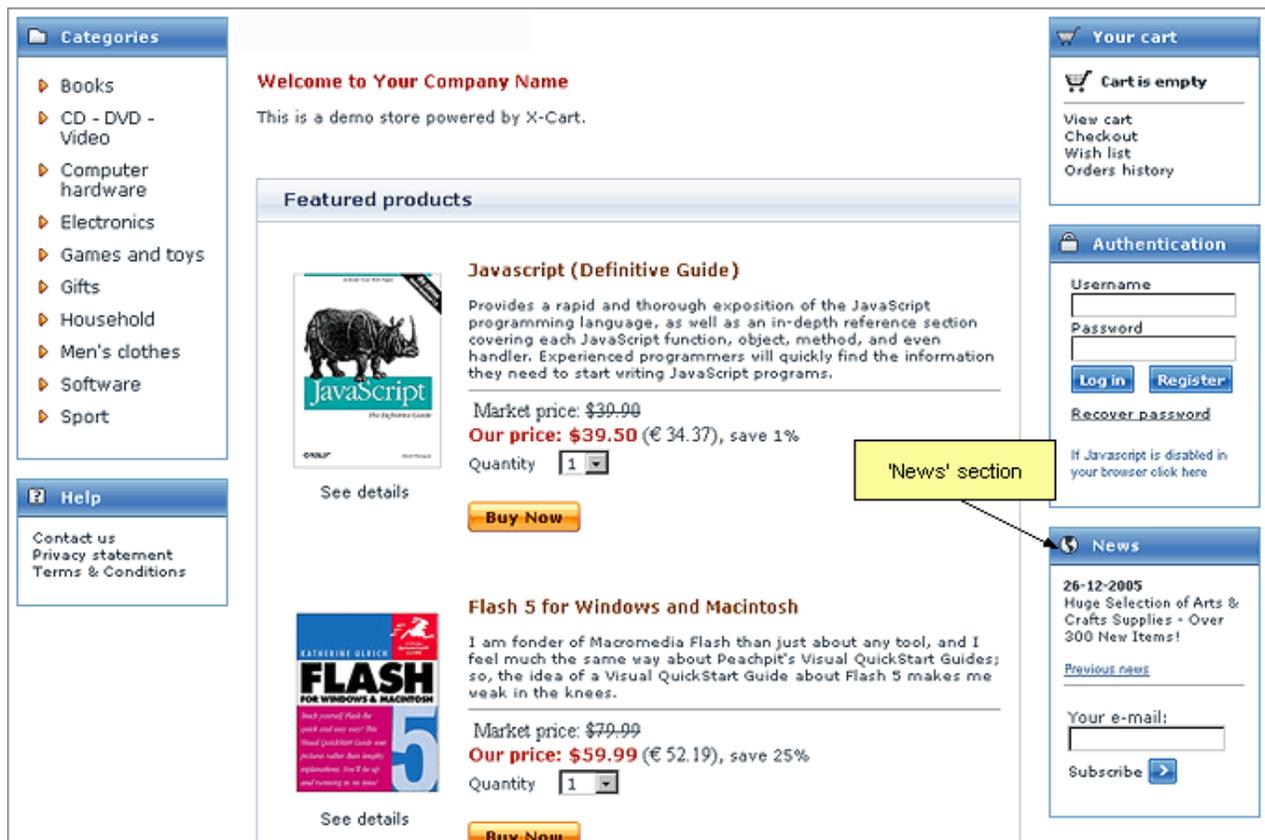
- you can create messages about your store news using the 'News management' section of the Admin area;
- the messages appear in the 'News' section of the Customer area and/or get sent to those of your

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.



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*.

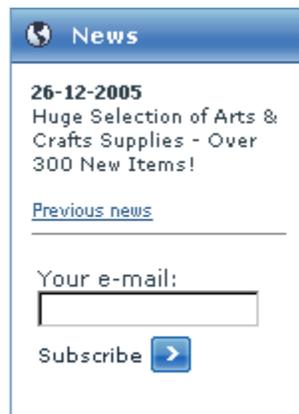
Before you post any news messages, the 'News' section says 'No news available at the moment'. After you have added one or more news messages, the message added latest of all appears in the 'News' section. The news messages posted previously are available for viewing in the news archive (accessible by clicking the 'Previous news' link).

The screenshot displays the X-Cart v.4.3.0 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. A language selector is set to English. The main content area features a news archive with two items. A yellow callout box labeled "News message in the news archive" points to the first two items. The first item is dated "26-12-2005" and titled "Kids Craft Kits" with the text "Huge Selection of Arts & Craft Supplies - Over 300 New Items!". The second item is also dated "26-12-2005" and titled "The ideal gift" with the text "Superb range of watering, planters and vases is now available!". On the left, there is a sidebar with a "Categories" section listing various product categories and a "Help" section with links to Contact us, Privacy statement, and Terms & Conditions. On the right, there is a "Your cart" section showing an empty cart, an "Authentication" section with fields for Username and Password, and a "News" section showing a preview of the first news item.

## 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**

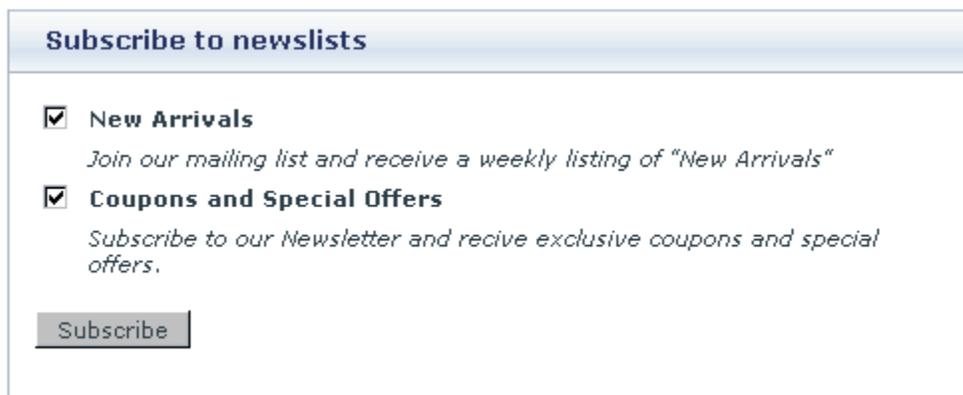
**26-12-2005**  
Huge Selection of Arts & Crafts Supplies - Over 300 New Items!

[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 link allowing these subscribers to unsubscribe from 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.

## 10.22.1 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.

## 10.22.2 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"/>	New Arrivals	<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"/>	New Arrivals	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Coupons and Special Offers	<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.

### 10.22.3 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 email address to a mailing list manually:

1. Open the mailing list to which you wish to add an email address.
2. Enter the email address into the 'email' 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 email 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:

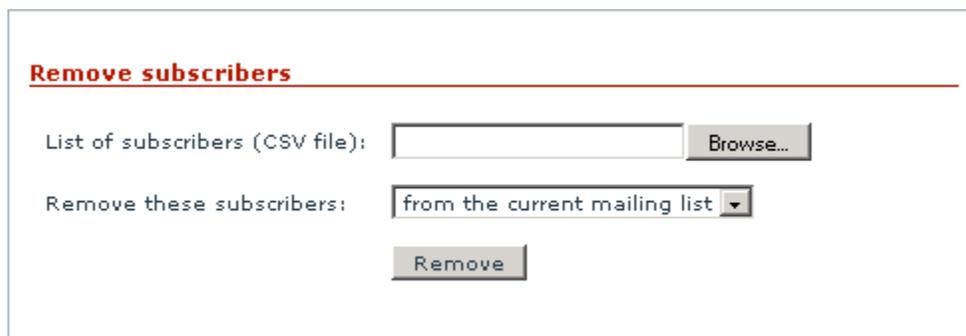
1. Open the mailing list from which you wish to remove email addresses.
2. Select the check boxes next to the email addresses that need to be removed.

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 email 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.

## 10.22.4 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 emails' 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.

## 10.23 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.

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 border, containing the text "Track It!" in a dark 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.

## 10.24 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](#)).

## 10.24.1 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.

## 10.24.2 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.

## 10.24.3 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

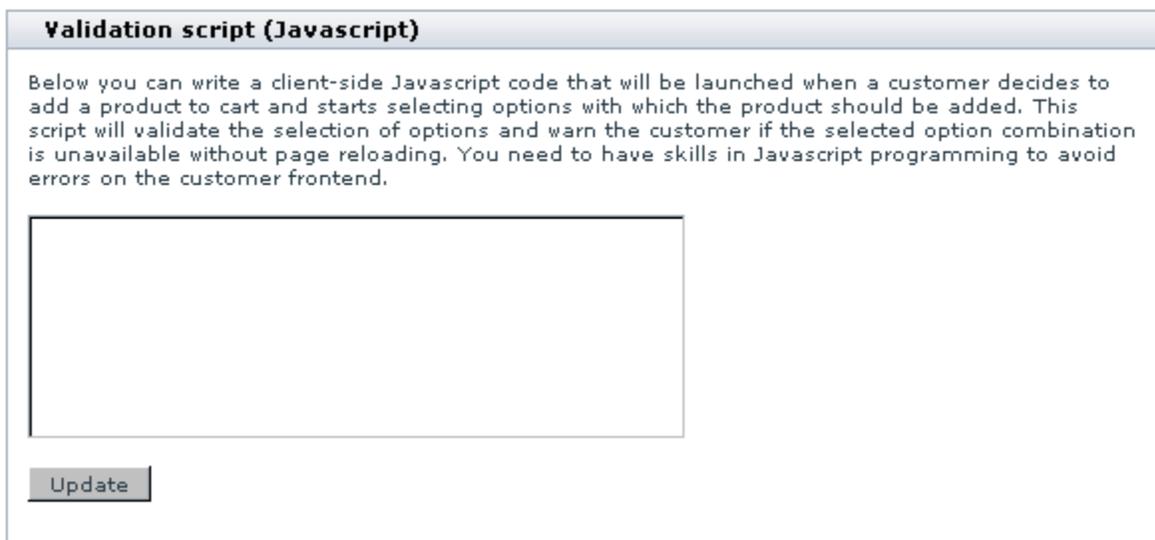
### Deleting product option exceptions

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 script (Javascript)**

Below you can write a client-side Javascript code that will be launched when a customer decides to add a product to cart and starts selecting options with which the product should be added. This script will validate the selection of options and warn the customer if the selected option combination is unavailable without page reloading. You need to have skills in Javascript programming to avoid errors on the customer frontend.

Update

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'.

## 10.24.4 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.

**Note:** Using a large number of option groups and option values to form product variants creates considerable load on the server and may cause poor performance for your store's visitors. Please use product variants only if you need to be able to specify quantity in stock, SKU and weight separately for each product variation. In all other cases, using product options is recommended.

[+ Filter product variants](#)

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

	Variants	Image	SKU	Weight	Quantity in stock	Price	Def
<input type="checkbox"/>	Color: Dark chambray Size: S		SKU161314	0.00	1000	14.50	<input type="radio"/>
<input type="checkbox"/>	Color: White Size: S		SKU161314	0.00	1000	14.50	<input type="radio"/>
<input type="checkbox"/>	Color: Seaweed Size: S		SKU161314	0.00	1000	14.50	<input type="radio"/>
<input type="checkbox"/>	Color: Gray Size: S		SKU161314	0.00	1000	14.50	<input type="radio"/>
<input type="checkbox"/>	Color: New ginger Size: S		SKU161314	0.00	1000	14.50	<input type="radio"/>
<input type="checkbox"/>	Color: Walnut Size: S		SKU161314	0.00	1000	14.50	<input type="radio"/>

Edit selected: [Change images](#) [Back to default image](#)

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 **Change images** link in the 'Edit selected' 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 **Back to default image**. 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"](#).

## 10.25 QuickBooks

### What QuickBooks module does

This module enables you to export orders in IIF (QuickBooks 2002, 2003) format.

### 10.25.1 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:

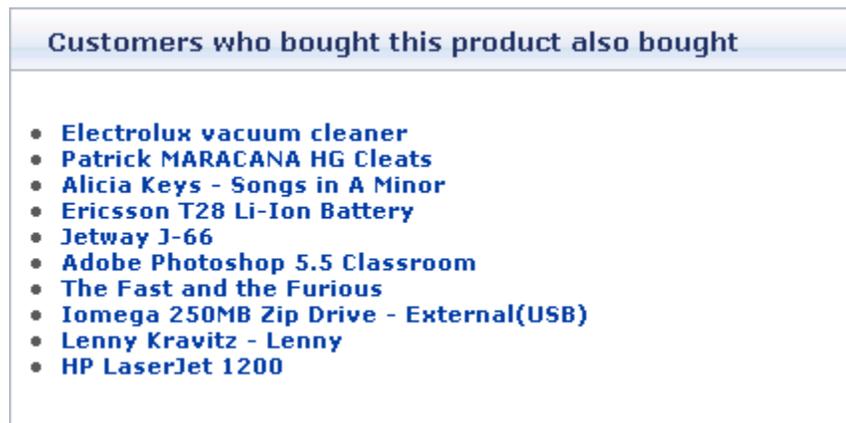
General settings	
<b>QuickBooks</b>	
Transactions class name.:	<input type="text" value="Website:Retail"/>
The name of the income account you use to track taxes. The type of this account should be INC.:	<input type="text" value="Website:Tax"/>
The name of the income account you use to track product sales. 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.

## 10.26 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'](#)).

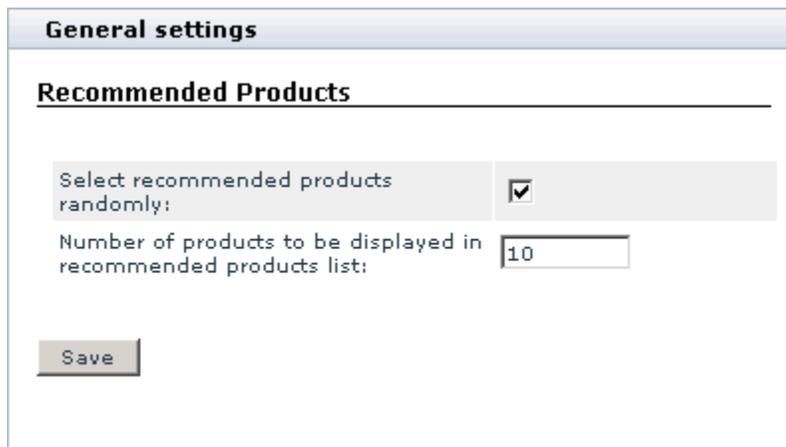
### 10.26.1 Enabling and Configuring 'Recommended Products'

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.

## 10.27 RMA

The **X-RMA** module is designed to simplify the process of managing product returns, which may be very annoying if you do not have a special tool to deal with it. With X-RMA product returns become quick and convenient; the module organizes the whole process and allows your customers and you to avoid negative experience by getting rid of endless email correspondence.

The key features of the X-RMA add-on module include:

- Individual return period for each product;

- Automatic generation of return slips;
- Ability to issue credits for future purchases;
- Configurable product return reasons;
- Email notifications about submitted return request to the store staff;
- Email notifications about authorized and declined requests to customers.

**X-RMA** is a reliable and up-to-date solution that makes your business even more competitive.

## 10.27.1 Admin Area

X-RMA enables store administrators to adjust some of its settings, define product return time, manage return requests, add/modify return reasons and actions that customers can expect to be carried out by the store staff if a return request is approved. For details, study the following sections of the manual:

- [Enabling and Configuring X-RMA](#);
- [Setting Product Return Time](#);
- [Managing Return Requests](#);
- [Adding/Modifying Return Reasons](#);
- [Adding/Modifying Return Actions](#).

### 10.27.1.1. Enabling and Configuring X-RMA

This section provides instructions on how to enable and configure the X-RMA add-on module.

#### Enabling X-RMA

To enable the module:

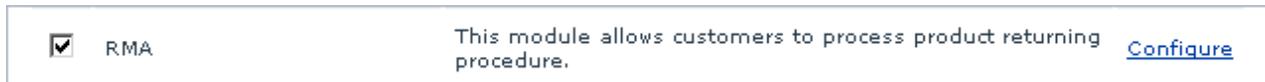
1. In the Admin area, go to the Modules section (Administration menu->Modules).
2. In the list of the available modules, find the entry "RMA" and select the check box next to it.
3. Click the **Update** button at the bottom of the page.

#### Configuring X-RMA

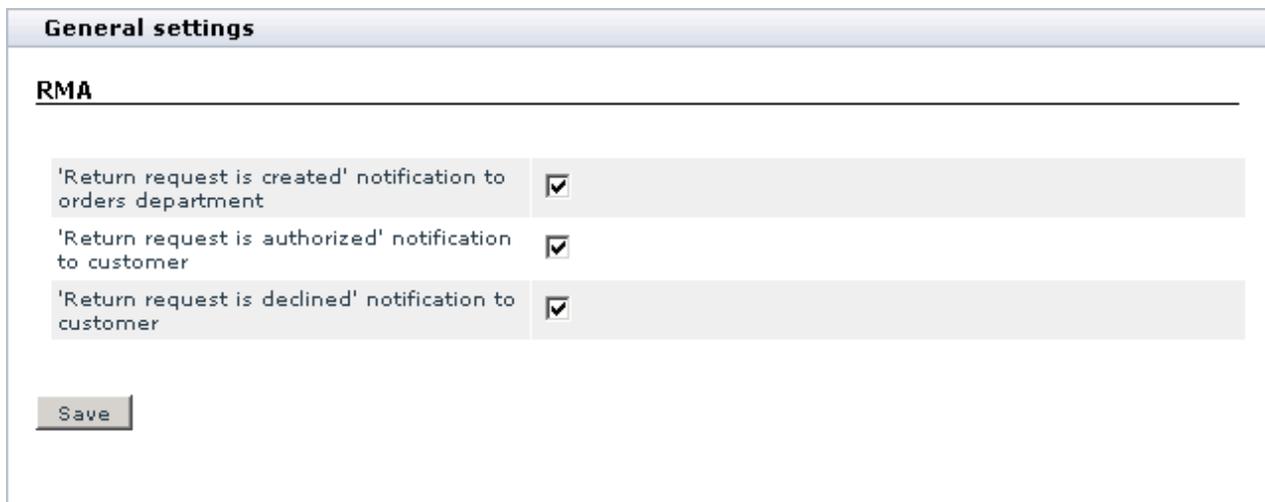
X-RMA allows you to adjust some of its options.

To configure the module:

1. In the Admin area, go to the Modules section (Administration menu->Modules).
2. Find the entry "RMA" and click on the **Configure** link that corresponds to the entry.



After you click on **Configure**, X-Cart will open the General settings box with the RMA section inside it.



3. Adjust the X-RMA options by selecting/unselecting the check boxes that correspond to the options.
4. Click the **Save** button to apply the changes.

### 10.27.1.2. Setting Product Return Time

For each product in the catalog, X-RMA enables you to specify a time period during which the product return is permitted. This feature also allows you to decide whether a product should be returnable or not.

To set the product return time for a product:

1. In the Admin area, use the Search for products section (Products menu->Search for products) to find the product that you want to set the product return time for.

2. In the Search result box, click on the product name to open the product for editing.

You'll be redirected to the product details page.

3. In the Product details box, scroll down until you see the text field Product return time (days):

Price (\$):	<input type="text" value="3990.00"/>
List price (\$):	<input type="text" value="4433.33"/>
Quantity in stock (items):	<input type="text" value="100"/>
Low limit in stock:	<input type="text" value="10"/>
Minimum order quantity:	<input type="text" value="1"/>
Product return time (days):	<input type="text" value="14"/>

4. Use the Product return time (days) text field to set up the time period (in days) during which a customer should be permitted to return the product.

**Note:** Setting the value to 0 (zero) will automatically make the product non-returnable, and your customers won't be able to request a return.

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

### 10.27.1.3. Managing Return Requests

As a store administrator, you can manage the existing returns requests in the following ways:

- Approve and decline requests by changing their status;
- Edit return request details;
- Issue credits for returned products;
- Delete return requests.

#### Finding existing return requests

To find the existing return requests:

1. In the Admin area, go to the Returns section (Management menu->Returns).

The system will display the Search form. Use the form to adjust search criteria. The system will display only those results that meet the criteria.

**Search**

Period from: January 01 2009

Period to: December 31 2009

ReturnID:

Statuses: All

2. Click the **Search** button to display the list of return requests that meet the search criteria.

The Returns box with the list of return requests will appear.

**Returns**

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

	ReturnID	Customer	Product	Order	Date	Status	Credit status
<input type="checkbox"/>	<a href="#">RMA#1</a>	<a href="#">Mary Roe</a>	<a href="#">Short-sleeved shirt (1 Items)</a> Color: White Size: S	<a href="#">1064</a>	26-02-2009 09:29:50	<span>Return authorized</span>	<a href="#">Created</a>
<input type="checkbox"/>	<a href="#">RMA#2</a>	<a href="#">Mary Roe</a>	<a href="#">Photoshop 6 Down and Dirty Tricks (1 Items)</a> Cover: Soft	<a href="#">1065</a>	26-02-2009 09:53:27	<span>Return authorized</span>	<a href="#">Created</a>
<input type="checkbox"/>	<a href="#">RMA#3</a>	<a href="#">Mary Roe</a>	<a href="#">Cranium (1 Items)</a> Gift pack: Yes	<a href="#">1066</a>	02-03-2009 10:42:43	<span>Return authorized</span>	<a href="#">Created</a>

The operations below are for the first selected item only:

### Changing request status

There are five possible statuses for the return requests: *Return requested*, *Return authorized*, *Return declined*, *Return completed* and *Removed by customer*. When a customer creates a return request, it automatically gets the *Return requested* status. The store administrator is supposed to change the request

status when the request is processed.

Changing the request status to *Return authorized* or *Return completed* means that you approve the request. For each approved request the system allows you to issue a credit. Changing the request status to *Return declined* means that you do not approve the request and you are not going to finalize the return.

**Important:** If you change the request status to *Return authorized* or *Return completed* it will not automatically update the inventory (number of items in stock). If necessary, you need to update product quantity manually.

The *Removed by customer* status means that the customer who had created the request chose to delete it. Request with the *Removed by customer* status are not displayed at the Customer area.

To change the request status:

1. Open the Returns box with the list of existing return requests.
2. In the Status column, select a new request status from the drop-down box.

**Returns**

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

	ReturnID	Customer	Product	Order	Date	Status	Credit status
<input type="checkbox"/>	<a href="#">RMA#1</a>	<a href="#">Mary Roe</a>	<a href="#">Short-sleeved shirt (1 Items)</a> Color: White Size: S	<a href="#">1064</a>	26-02-2009 09:29:50	Return authorized	<a href="#">Created</a>
<input type="checkbox"/>	<a href="#">RMA#2</a>	<a href="#">Mary Roe</a>	<a href="#">Photoshop 6 Down and Dirty Tricks (1 Items)</a> Cover: Soft	<a href="#">1065</a>	26-02-2009 09:53:27	Return authorized	<a href="#">Created</a>
<input type="checkbox"/>	<a href="#">RMA#3</a>	<a href="#">Mary Roe</a>	<a href="#">Cranium (1 Items)</a> Gift pack: Yes	<a href="#">1066</a>	02-03-2009 10:42:43	Return authorized	<a href="#">Created</a>

The operations below are for the first selected item only:

3. Click the **Update** button to apply the changes.

**Note:** It is also possible to change the request status when editing the request details.

## Modifying existing return requests

You can modify the existing return requests by editing their details and changing their status.

To modify a return request:

1. Open the Returns box with the list of existing return requests.
2. In the Returns box, select the check box for the request that you want to modify and click the **Modify** button. Alternatively, click on the request ID in the **ReturnID** column.

**Returns**

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

	ReturnID	Customer	Product	Order	Date	Status	Credit status
<input type="checkbox"/>	<a href="#">RMA#1</a>	<a href="#">Mary Roe</a>	<a href="#">Short-sleeved shirt (1 Items)</a> Color: White Size: S	<a href="#">1064</a>	26-02-2009 09:29:50	Return authorized	<a href="#">Created</a>
<input type="checkbox"/>	<a href="#">RMA#2</a>	<a href="#">Mary Roe</a>	<a href="#">Photoshop 6 Down and Dirty Tricks (1 Items)</a> Cover: Soft	<a href="#">1065</a>	26-02-2009 09:53:27	Return authorized	<a href="#">Created</a>
<input type="checkbox"/>	<a href="#">RMA#3</a>	<a href="#">Mary Roe</a>	<a href="#">Cranium (1 Items)</a> Gift pack: Yes	<a href="#">1066</a>	02-03-2009 10:42:43	Return authorized	<a href="#">Created</a>

The operations below are for the first selected item only:

This will open the Modify box where you can edit request details.

**Modify**[Returns list](#) >

Customer	<a href="#">Mary Roe</a>
Product	<a href="#">Cranium (1 Items)</a> Gift pack: Yes
Order	<a href="#">1066</a>
Date	02-03-2009 10:42:43
Reason for returning	<input type="text" value="Wrong item sent"/>
What you would like us to do	<input type="text" value="Give me a credit for future purchase"/>
Comment	<input type="text" value="I ordered Cranium with a gift wrapper, but you sent me it without a wrapper. Please credit me \$5 for the wrapper."/>
Status	<input type="text" value="Return requested"/>

4. Edit the return details. If necessary, change the order status.
5. Click the **Modify** button to apply the changes.
6. If required, click the **Print Return slip** button to print out a slip for the approved return request.
7. Click the **Returns list** button to go back to the list of returns.

### Issuing credits for returned products

For each approved product return, which has the status *Return authorized* or *Return completed*, you can create a monetary credit. The amount of the credit is controlled by the store administrator and can either coincide with the original order amount or differ from it. It is very convenient to have an editable amount of the credit if, for example, your return policy does not cover 100% of the original product cost or it involves other limitations.

Once you create a credit, X-RMA automatically converts it to a gift certificate and sends it to the email address of the customer who requested the return.

To create a credit:

1. Open the Returns box with the list of existing return requests.
2. In the Returns box, click on the **Create** link that corresponds to the approved return request. If necessary, edit the return amount before clicking on **Create**.

**Returns**

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

	ReturnID	Customer	Product	Order	Date	Status	Credit status
<input type="checkbox"/>	<a href="#">RMA#1</a>	<a href="#">Mary Roe</a>	<a href="#">Short-sleeved shirt (1 Items)</a> Color: White Size: S	<a href="#">1064</a>	26-02-2009 09:29:50	Return authorized	<a href="#">Created</a>
<input type="checkbox"/>	<a href="#">RMA#2</a>	<a href="#">Mary Roe</a>	<a href="#">Photoshop 6 Down and Dirty Tricks (1 Items)</a> Cover: Soft	<a href="#">1065</a>	26-02-2009 09:53:27	Return authorized	<a href="#">Created</a>
<input type="checkbox"/>	<a href="#">RMA#3</a>	<a href="#">Mary Roe</a>	<a href="#">Cranium (1 Items)</a> Gift pack: Yes	<a href="#">1066</a>	02-03-2009 10:42:43	Return authorized	<input type="text" value="39.99"/> <a href="#">Create</a>

The operations below are for the first selected item only:

This will reload the page. Now the credit status of the request has changed to *Created*.

Returns							
<a href="#">Check all</a> / <a href="#">Uncheck all</a>							
	ReturnID	Customer	Product	Order	Date	Status	Credit status
<input type="checkbox"/>	<a href="#">RMA#1</a>	<a href="#">Mary Roe</a>	<a href="#">Short-sleeved shirt (1 Items)</a> Color: White Size: S	<a href="#">1064</a>	26-02-2009 09:29:50	Return authorized	<a href="#">Created</a>
<input type="checkbox"/>	<a href="#">RMA#2</a>	<a href="#">Mary Roe</a>	<a href="#">Photoshop 6 Down and Dirty Tricks (1 Items)</a> Cover: Soft	<a href="#">1065</a>	26-02-2009 09:53:27	Return authorized	<a href="#">Created</a>
<input type="checkbox"/>	<a href="#">RMA#3</a>	<a href="#">Mary Roe</a>	<a href="#">Cranium (1 Items)</a> Gift pack: Yes	<a href="#">1066</a>	02-03-2009 10:42:43	Return authorized	<a href="#">Created</a>

The operations below are for the first selected item only:

3. Click on **Created** to view the gift certificate details.

Gift Certificate Details	
<b>Gift Certificate Details</b>	
From:	<b>Return service</b>
To:	<b>maryroe</b>
Message:	Return: Credit for future purchases
Amount:	<b>\$39.99</b>
Template:	<b>template_default.tpl</b>
<b>E-mail Address</b>	
E-mail:	<b>m.roe@example.com</b>
<a href="#">Go Back</a> <input type="button" value="➤"/>	

## Deleting existing return request

1. Open the Returns box with the list of existing return requests.
2. In the Returns box, select the check boxes for the requests that you want to delete.

**Returns**

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

	ReturnID	Customer	Product	Order	Date	Status	Credit status
<input type="checkbox"/>	<a href="#">RMA#1</a>	<a href="#">Mary Roe</a>	<a href="#">Short-sleeved shirt (1 Items)</a> Color: White Size: S	<a href="#">1064</a>	26-02-2009 09:29:50	Return authorized ▼	<a href="#">Created</a>
<input type="checkbox"/>	<a href="#">RMA#2</a>	<a href="#">Mary Roe</a>	<a href="#">Photoshop 6 Down and Dirty Tricks (1 Items)</a> Cover: Soft	<a href="#">1065</a>	26-02-2009 09:53:27	Return authorized ▼	<a href="#">Created</a>
<input type="checkbox"/>	<a href="#">RMA#3</a>	<a href="#">Mary Roe</a>	<a href="#">Cranium (1 Items)</a> Gift pack: Yes	<a href="#">1066</a>	02-03-2009 10:42:43	Return authorized ▼	<input type="text" value="39.99"/> <a href="#">Create</a>

The operations below are for the first selected item only:

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

### 10.27.1.4. Adding/Modifying Reasons for Returns

X-RMA offers a set of predefined reasons for requested returns (e.g., *Wrong item ordered*, *Damaged during shipping*, etc.). Customers need to choose one of the reasons when requesting a return so that to give the store staff a general idea of why the return is being requested. You can edit the list of the available reasons so that it could better fit your business model.

You can carry out the following tasks:

- Modify the existing return reasons;

- Delete the existing return reasons;
- Add new return reasons.

## Opening return reason interface

To open the interface for managing return reasons:

1. In the Admin area, go to the Returns section (Management menu->Returns).
2. Click on the **Add/Modify reasons** link on the In this section box.



This will open the Add/Modify reasons box.

### Add/Modify reasons

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

<input type="checkbox"/>	Wrong item ordered
<input type="checkbox"/>	Wrong description online
<input type="checkbox"/>	Do not like the product
<input type="checkbox"/>	Can't get it to work
<input type="checkbox"/>	Manufacturer defect or DOA
<input type="checkbox"/>	Damaged during shipping
<input type="checkbox"/>	Wrong item sent

**New reason**

## Editing existing return reasons

1. Open the Add/Modify reasons box.
2. Edit the text of the existing return reasons.

3. Click the **Update** button.

### Deleting existing return reasons

1. Open the Add/Modify reasons box.
2. Select the check boxes for the reasons that you want to delete.
3. Click the **Delete selected** button.

### Adding new return reasons

To add a new reason to the list:

1. Open the Add/Modify reasons box.
2. In the New reason text field enter the name of the reason you want to add.

**Add/Modify reasons**

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

<input type="checkbox"/>	Wrong item ordered
<input type="checkbox"/>	Wrong description online
<input type="checkbox"/>	Do not like the product
<input type="checkbox"/>	Can't get it to work
<input type="checkbox"/>	Manufacturer defect or DOA
<input type="checkbox"/>	Damaged during shipping
<input type="checkbox"/>	Wrong item sent

**New reason**

---

3. Click the **Add** button.

### 10.27.1.5. Adding/Modifying Actions

X-RMA offers a set of predefined actions for requested returns (e.g., *Repair and ship back*, *Give a credit for further purchases*, etc.). Customers need to choose one of the actions when requesting a return so that to tell the store staff what actions they are expected to do. You can edit the list of the available actions so that it could better fit your business model.

You can carry out the following tasks:

- Modify the existing actions;
- Delete the existing actions;
- Add new actions.

#### Opening return action interface

To open the interface for managing return actions:

1. In the Admin area, go to the Returns section (Management menu->Returns).
2. Click on the **Add/Modify actions** link on the In this section box.



This will open the Add/Modify actions box.

**Add/Modify actions**  
[Check all](#) / [Uncheck all](#)  
 Send replacement if within war  
 Repair and ship back  
 Give me a credit for future pur  
 Other  
  
   
  
**New action**

### Editing existing return actions

1. Open the Add/Modify actions box.
2. Edit the text of the existing return actions.
3. Click the **Update** button.

### Deleting existing return actions

1. Open the Add/Modify actions box.
2. Select the check boxes for the actions that you want to delete.
3. Click the **Delete selected** button.

### Adding new return actions

To add a new reason to the list:

1. Open the Add/Modify actions box.
2. In the New action text field enter the name of the action you want to add.

**Add/Modify actions**  
[Check all](#) / [Uncheck all](#)  
 Send replacement if within war  
 Repair and ship back  
 Give me a credit for future pur  
 Other  
   
**New action**

3. Click the **Add** button.

## 10.27.2 Customer Area

X-RMA enables customers to place return requests and manage previously placed return request. For details, study the following sections of the manual:

- [Creating Return Requests](#);
- [Managing Return Requests](#).

### 10.27.2.1. Creating Return Requests

To create a product return request:

1. Log in to the Customer area.
2. In the Your cart box, click on the **Order history** link.



After you click on **Order history**, you'll be redirected to the Orders management section of the Customer area.

### Search for orders

Setting up advanced search parameters provides more relevant results.

**Date period:**

All dates  
 This month  
 This week  
 Today  
 From:     
To:

[+ More search options](#)

[Reset filter](#)

3. Use the Search for orders box to find the order for which you want to create a return request.
4. Click on either the order number or the order status to open the Order details page.
5. Click on the **Create return** link.

### Order details

[<< Order #1065](#)

[Create return](#) [Print invoice](#)

**Note:** If there is no the **Create return** link, it means that either none of the products in the order are

returnable, i.e. their return time is set to 0 (zero), or the product return time has expired. In this situation, you cannot create a return request.

After you click on **Create return**, you will see the Create return request box, which is used to create a return request.

### Create return request

	Product	Quantity
<input checked="" type="checkbox"/>	Cranium Gift pack: Yes	1 ▾
<input type="checkbox"/>	Grill room	1 ▾
<input type="checkbox"/>	LENNY	1 ▾

Reason for returning:

What you would like us to do:

Comment:

6. Select the checkbox for the products you want to return, the amount, the reason and the actions that store staff should do. If necessary, leave a comment.
7. Click the **Create** button to create a request and send it to the store staff.

After you click **Create**, the system will display a confirmation message saying that the return request has been created successfully.



Your request will be added to the list of returns. To view the list, click on the **Returns** link in the Your cart

box.



In the Returns box you will see the list of all your returns. The current status of each request in the list is shown in the **Status** column. If necessary, you can either delete or modify the listed return requests.

**Returns**

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

	ReturnID	Product	Order	Date	Status
<input type="checkbox"/>	<a href="#">RMA#1</a>	<a href="#">Short-sleeved shirt (1 Items)</a> Color: White Size: S	<a href="#">1064</a>	26-02-2009 09:29:50	Return authorized
<input type="checkbox"/>	<a href="#">RMA#2</a>	<a href="#">Photoshop 6 Down and Dirty Tricks (1 Items)</a> Cover: Soft	<a href="#">1065</a>	26-02-2009 09:53:27	Return authorized
<input type="checkbox"/>	<a href="#">RMA#3</a>	<a href="#">Cranium (1 Items)</a> Gift pack: Yes	<a href="#">1066</a>	02-03-2009 10:42:43	Return requested

**Delete selected**

The operations below are for the first selected item only:

**Modify**

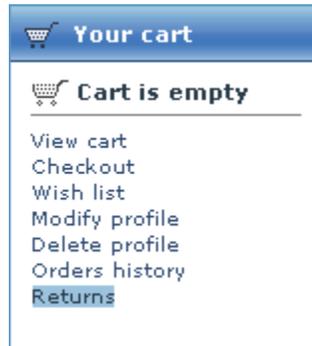
## 10.27.2.2. Managing Return Requests

X-RMA enables customers to modify and delete the return requests that they previously placed.

### Finding existing return requests

To find the existing return requests:

1. Log in to the Customer area.
2. In the Your cart box, click on the **Returns** link.



After you click on **Returns**, the system will display the Search form. Use the form to adjust search criteria. The system will display only those results that meet the criteria.

**Search**

Period from

Period to

ReturnID

Statuses

3. Click the **Search** button to display the list of return requests that meet the search criteria.

The Returns box with the list of return requests will appear.

Returns					
<a href="#">Check all</a> / <a href="#">Uncheck all</a>					
	ReturnID	Product	Order	Date	Status
<input type="checkbox"/>	<a href="#">RMA#1</a>	<a href="#">Short-sleeved shirt (1 Items)</a> Color: White Size: S	<a href="#">1064</a>	26-02-2009 09:29:50	Return authorized
<input type="checkbox"/>	<a href="#">RMA#2</a>	<a href="#">Photoshop 6 Down and Dirty Tricks (1 Items)</a> Cover: Soft	<a href="#">1065</a>	26-02-2009 09:53:27	Return authorized
<input type="checkbox"/>	<a href="#">RMA#3</a>	<a href="#">Cranium (1 Items)</a> Gift pack: Yes	<a href="#">1066</a>	02-03-2009 10:42:43	Return requested

**Delete selected**

The operations below are for the first selected item only:

**Modify**

## Modifying existing return requests

Customers are allowed to edit return request if only the request has the status *Requested*. If the request has a different status, it means that the request has been processed by the store staff already, and the customer cannot edit its details. For requests with statuses *Authorized* and *Completed* it is possible to print the return slip.

To modify a return request:

1. Open the Returns box with the list of existing return requests.
2. In the Returns box, select the check box for the request that you want to modify and click the **Modify** button. Alternatively, click on the request ID in the **ReturnID** column.

Returns					
<a href="#">Check all</a> / <a href="#">Uncheck all</a>					
<input type="checkbox"/>	ReturnID	Product	Order	Date	Status
<input type="checkbox"/>	<a href="#">RMA#1</a>	<a href="#">Short-sleeved shirt (1 Items)</a> Color: White Size: S	<a href="#">1064</a>	26-02-2009 09:29:50	Return authorized
<input type="checkbox"/>	<a href="#">RMA#2</a>	<a href="#">Photoshop 6 Down and Dirty Tricks (1 Items)</a> Cover: Soft	<a href="#">1065</a>	26-02-2009 09:53:27	Return authorized
<input type="checkbox"/>	<a href="#">RMA#3</a>	<a href="#">Cranium (1 Items)</a> Gift pack: Yes	<a href="#">1066</a>	02-03-2009 10:42:43	Return requested

**Delete selected**

The operations below are for the first selected item only:

**Modify**

This will open the Modify box where you can edit request details.

Modify	
	<a href="#">Returns list</a>
Product	<a href="#">Cranium (1 Items)</a> Gift pack: Yes
Reason for returning	<input type="text" value="Wrong item sent"/>
What you would like us to do	<input type="text" value="Give me a credit for future purchase"/>
Comment	<input type="text" value="I ordered Cranium with a gift wrapper, but you sent me it without a wrapper. Please credit me \$5 for the wrapper."/>
	<b>Modify</b>

3. Edit the return details and click the **Modify** button to apply the changes.

### Deleting existing return requests

Customers can delete their return requests. Deleted requests get removed from the returns list in the Customer area; but they are still kept in the returns list in the Admin area and have the status *Removed by customer*. In case of need, the store staff can edit the details of a removed request and change its status.

To delete a return request:

1. Open the Returns box with the list of existing return requests.
3. In the Returns box, select the check boxes for the requests that you want to delete.

**Returns**

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

	ReturnID	Product	Order	Date	Status
<input type="checkbox"/>	<a href="#">RMA#1</a>	<a href="#">Short-sleeved shirt (1 Items)</a> Color: White Size: S	<a href="#">1064</a>	26-02-2009 09:29:50	Return authorized
<input type="checkbox"/>	<a href="#">RMA#2</a>	<a href="#">Photoshop 6 Down and Dirty Tricks (1 Items)</a> Cover: Soft	<a href="#">1065</a>	26-02-2009 09:53:27	Return authorized
<input type="checkbox"/>	<a href="#">RMA#3</a>	<a href="#">Cranium (1 Items)</a> Gift pack: Yes	<a href="#">1066</a>	02-03-2009 10:42:43	Return requested

**Delete selected**

The operations below are for the first selected item only:

**Modify**

4. Click the **Delete selected** button.

## 10.28 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](#)).

## 10.28.1 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.

## 10.28.2 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.

## 10.29 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 Administration menu, typically available just in the Admin area, appears in the Provider area along with the provider menus. Some menu items are also added to the existing provider 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).

## 10.30 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'](#)).

## 10.30.1 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.

## 10.31 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](#)).
- 

### 10.31.1 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"/>	

**Note:** The minimum time of order placement ensuring that the order was placed by a person, not by a script, is entered in seconds.

**Important:** If you do not disable the option 'Fail checkout process, if customer proxy is anonymous', customers using anonymous proxy servers will automatically be blocked.

## 10.31.2 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			
<input type="checkbox"/>	△ IP	REASON	STATUS
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"/>
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			
<input type="checkbox"/>	△ IP	REASON	STATUS
<input type="checkbox"/>	111.111.111.111	Added by administrator	Blocked
<input type="button" value="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	>>
<input type="button" value="Delete selected"/>					

Clicking the '>>' link in the DETAILS column opens a new window containing the 'Lookup address' dialog that allows you to find out information about the IP address (City, State, Country, Postal code) from Antifraud service.

X-CART. Powerful PHP shopping cart software - 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.

## 10.32 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 email 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](#)).

### 10.32.1 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. The title bar reads "General settings". Below it, the section "Subscriptions" is highlighted. There are three main elements: a text input field 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.

## 10.32.2 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.

Subscription			
PAY PERIOD	PERIOD FEE (\$)	COST OF ONE DAY (\$)	DAYS SAME PERIOD
Annually			
			days
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"/>			

- Click the **Apply** button. Pay dates button will appear.
- Click the **Pay dates** button. Use the calendar to select the dates on which payments will need to be taken.

**Pay dates**

#17437: 512 MB (266Mhz) PC2100 DIMM - Pay dates

Choose pay dates from the calendar below

Year:

January		February		March		April	
Su	06 13 20 27	Su	03 10 17 24	Su	02 09 16 23 30	Su	06 13 20 27
Mo	07 14 21 28	Mo	04 11 18 25	Mo	03 10 17 24 31	Mo	07 14 21 28
Tu	01 08 15 22 29	Tu	05 12 19 26	Tu	04 11 18 25	Tu	01 08 15 22 29
Wd	02 09 16 23 30	Wd	06 13 20 27	Wd	05 12 19 26	Wd	02 09 16 23 30
Th	03 10 17 24 31	Th	07 14 21 28	Th	06 13 20 27	Th	03 10 17 24
Fr	04 11 18 25	Fr	01 08 15 22 29	Fr	07 14 21 28	Fr	04 11 18 25
St	05 12 19 26	St	02 09 16 23	St	01 08 15 22 29	St	05 12 19 26

May		June		July		August	
Su	04 11 18 25	Su	01 08 15 22 29	Su	06 13 20 27	Su	03 10 17 24
Mo	05 12 19 26	Mo	02 09 16 23 30	Mo	07 14 21 28	Mo	04 11 18 25
Tu	06 13 20 27	Tu	03 10 17 24	Tu	01 08 15 22 29	Tu	05 12 19 26
Wd	07 14 21 28	Wd	04 11 18 25	Wd	02 09 16 23 30	Wd	06 13 20 27
Th	01 08 15 22 29	Th	05 12 19 26	Th	03 10 17 24 31	Th	07 14 21 28
Fr	02 09 16 23 30	Fr	06 13 20 27	Fr	04 11 18 25	Fr	01 08 15 22 29
St	03 10 17 24 31	St	07 14 21 28	St	05 12 19 26	St	02 09 16 23 30

September		October		November		December	
Su	07 14 21 28	Su	05 12 19 26	Su	02 09 16 23 30	Su	07 14 21 28

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.

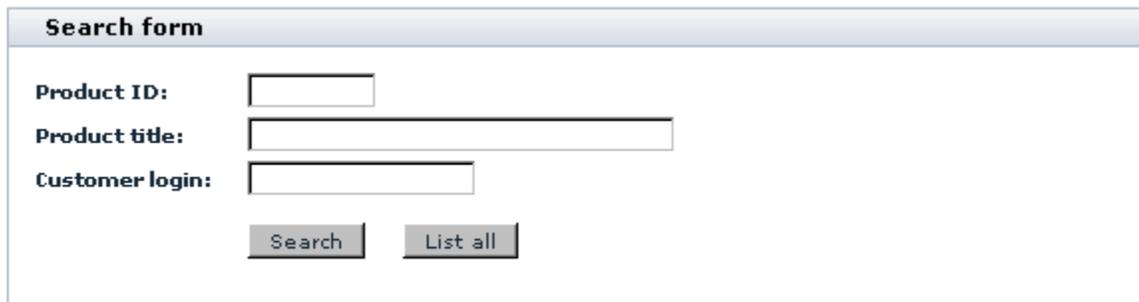
### 10.32.3 Managing Subscriptions

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 screenshot shows a search form titled "Search form" with a light blue header. Below the header, there are three input fields: "Product ID:" with a small rectangular input box, "Product title:" with a long horizontal input box, and "Customer login:" with a medium-width input 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**

**Table Format:**  
 <Product> (<Next Pay Date>): <Subscribers>  
 <Login> <Date of Subscription> (<Subscription Order Status>) <Last Paid Date> (<Last Paid Order Status>)  
**Note:** Order status codes: **Q** - Queued, **P** - Processed, **B** - Backordered, **D** - Declined, **F** - Failed, **C** - Complete.

CUSTOMER	SUBSCRIPTION DATE	LAST PAID DATE	STATUS
<b>Lamp</b> (06-18-2004): 1 subscriber(s)			
customer	06-16-2004 (Q)	06-16-2004 (Q)	Active <input style="vertical-align: middle;" type="button" value="▼"/> <span style="color: red; font-weight: bold; margin-left: 20px;">Charge</span>

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.

## 10.32.4 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=secret
```

or

```
/usr/bin/wget -q -O- http://www.mystore.com/admin/pay_subscriptions.php?key=secret
```

or

```
/usr/bin/fetch -o- http://www.mystore.com/admin/pay_subscriptions.php?key=secret
```

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.

## 10.33 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'](#)).

### 10.33.1 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 Settings 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 (Settings 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**

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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 email 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 pickup type:\***  
[Click here for help](#)

- Daily Pickup
- Customer counter
- One time pickup
- On call air
- Suggested retail rates
- Letter center

**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

---

To go to the UPS OnLine® Tools main page click on the 'Main page' button.

---

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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.

## 10.33.2 Setting up International Shipping

Some of the international shipping services offered by UPS may depend on other UPS services. If you are planning to use such shipping methods in your store, it is important to resolve these dependencies first. Otherwise X-Cart will not be able to estimate UPS shipping charges in the real-time mode.

To resolve the dependencies, you need to activate the generic UPS services along with the shipping

methods that you are planning to use. For example, UPS Express Saver (SM) depends on UPS Saver. Therefore, to get shipping charges for UPS Express Saver (SM) estimated you need to activate both UPS Express Saver (SM) and UPS Saver.

**To activate UPS shipping services:**

1. Log in to the Admin area.
2. Go to the Shipping methods section (Management menu -> Shipping methods).
3. In the 'Shipping methods' box, click on the UPS link to expand the list of available shipping methods.
4. Select the check boxes for the methods you want to activate.
5. Click the **Update** button.

**Important!**

Activate "UPS Saver" shipping method if you are going to offer the following methods for your customers:

- UPS Express Saver (SM)
- UPS Worldwide Saver (SM)
- UPS Worldwide Express Saver (SM)

Otherwise these methods will not be available for customers.

Activate "UPS Standard" shipping method to be able to offer the "UPS Standard to Canada" shipping method to customers.

## 10.34 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 with several key 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.
- Your product:** The main product area, currently showing 'No image Available'. It includes a 'Product description' section with 'Details' (SKU: SKU16133, Quantity in stock: 10 item(s) available, Price: \$79.00 (€ 68.73)) and an 'Options' section with a quantity dropdown set to 1 and an 'Add to cart' button.
- Your cart:** A sidebar section indicating 'Cart is empty' and providing links for 'View cart', 'Checkout', and 'Orders history'.
- Authentication:** A sidebar section with input 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'.
- Send to friend:** A section with three input fields for 'Your name', 'Your e-mail', and 'Recipient's e-mail', followed by a 'Send to friend' button.
- Related products:** A section at the bottom listing two related products: '#65 New Masters of Flash' and '#67 Designing Web Usability'.
- Help:** A sidebar section with links for 'Contact us', 'Privacy statement', and 'Disclaimer'.

**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](#)).

## 10.34.1 Enabling and Configuring 'Upselling Products'

To begin using the module:

1. Enable Upselling products module (Administration menu->Modules).

When the module is enabled, you can see: Upselling products options section in General settings/Modules options.

2. Adjust the module settings via General settings/Modules options->Upselling products options:



The screenshot shows a web interface for configuring the 'Upselling products' module. At the top, there is a header 'General settings' in a grey bar. Below it, the section 'Upselling products' is underlined. A text label reads: 'Open Product details page in a new window when a customer clicks on a product link in "Related products" list. :'. To the right of this text is an unchecked checkbox. At the bottom left of the form area is a 'Save' button.

- a) The option 'Open Product details page in a new window when a customer clicks on a product link in "Related products" list' defines where the Product details page will be opened if a customer clicks on an upselling link.

If you wish the Product details page to be opened in a new browser window, select the check box; however, if you wish the Product details page to be opened in the same browser window, leave the check box unselected.

- b) Click the **Save** button to save the changes.

## 10.34.2 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:

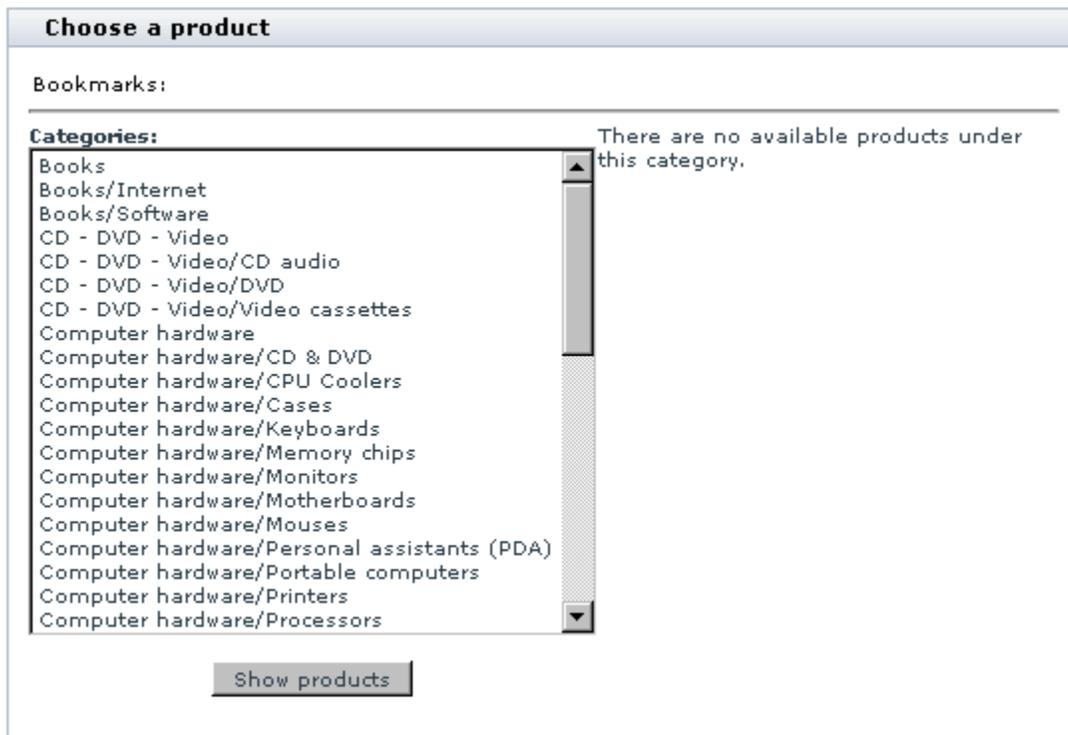
Bidirectional link

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:

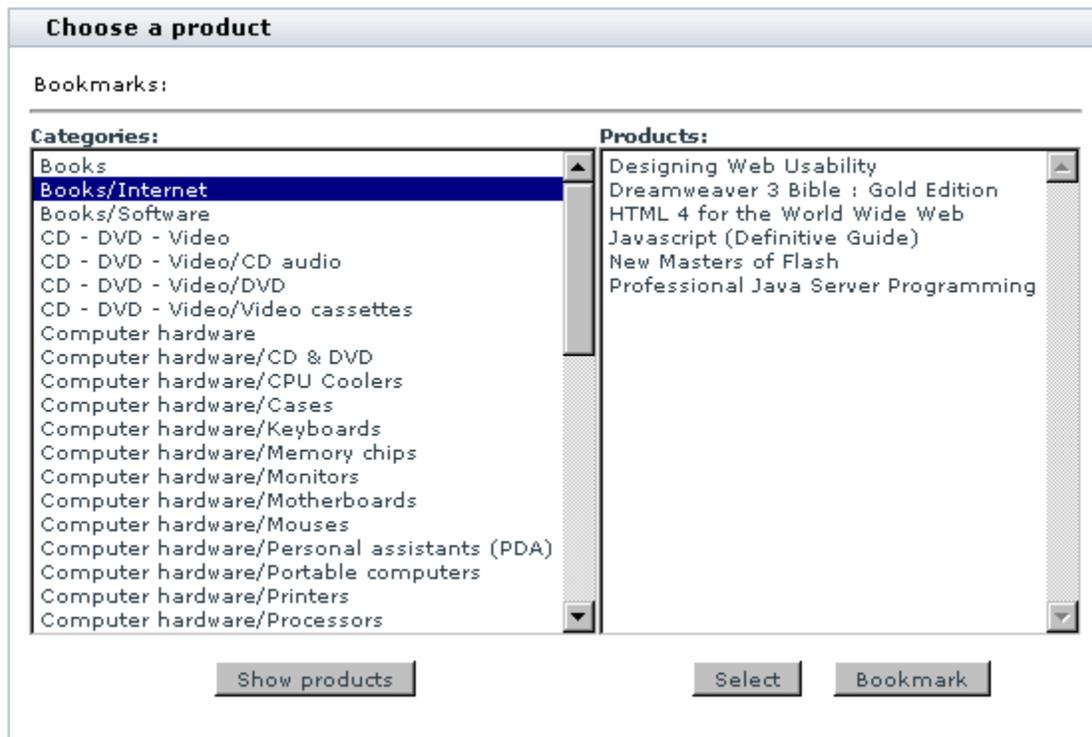
1. Click the **Browse** button next to the 'Product' field. A new window opens displaying a dialog box titled 'Choose a product':



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.

### 10.34.3 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.

## 10.35 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 x \$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 x \$39.50 = \$39.50 Cover: Soft <b>Designing Web Usability:</b> 1 x \$27.50 = \$27.50 Cover: Soft

You can view a customer's profile details by clicking on his name link. Clicking on a page URL link opens the page in a new window. Clicking on a product title allows you to view the details of the product.

## 10.36 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](#)).

### 10.36.1 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.

## 10.36.2 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.

## 10.37 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 'Printable version' link. On the left, there are navigation menus for 'Categories' (Books, CD - DVD - Video, Computer hardware, Electronics, Games and toys, Gifts, Household, Men's clothes, Software, Sport), 'Bestsellers' (1. PATRICK Maracana HG Cleats), 'Manufacturers' (ExampleBooks, ExampleHousehold), 'Special' (Gift certificates, Feature-based search), and 'Help' (Contact us, Privacy statement, Terms & Conditions). The main content area is titled 'Sport' and features two product listings. The first listing is for 'PATRICK Maracana HG Cleats' (SKU: C98715v), described as 'Soft full grain leather for superb comfort, reinforced heel counter, molded rubber wedge for excellent shock absorption, stability and durability.' It shows a market price of \$47.67 and a current price of \$41.95 (€ 36.50), with a quantity selector set to 1 and buttons for 'Buy Now' and 'Add to wish list'. A yellow callout box with an arrow points to the 'Add to wish list' button, containing the text: 'By clicking this button, a customer can add the product 'PATRICK Maracana HG Cleats' to Wish list'. The second listing is for 'Brine ATTACK Soccer Ball' (SKU: SOCBALL01), described as 'High Gloss Cover. Multi-layer Fabric Back. Butyl Bladder.' It shows a market price of \$15.06 and a current price of \$12.95 (€ 11.27), with a quantity selector set to 1 and buttons for 'Buy Now' and 'Add to wish list'. On the right side, there are two sidebars: 'Your cart' (Cart is empty, View cart, Checkout, Wish list, Modify profile, Delete profile, Orders history) and 'Authentication' (customer is logged in!, Log out, If Javascript is disabled in your browser click here).

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.

## 10.37.1 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.

## 10.37.2 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.

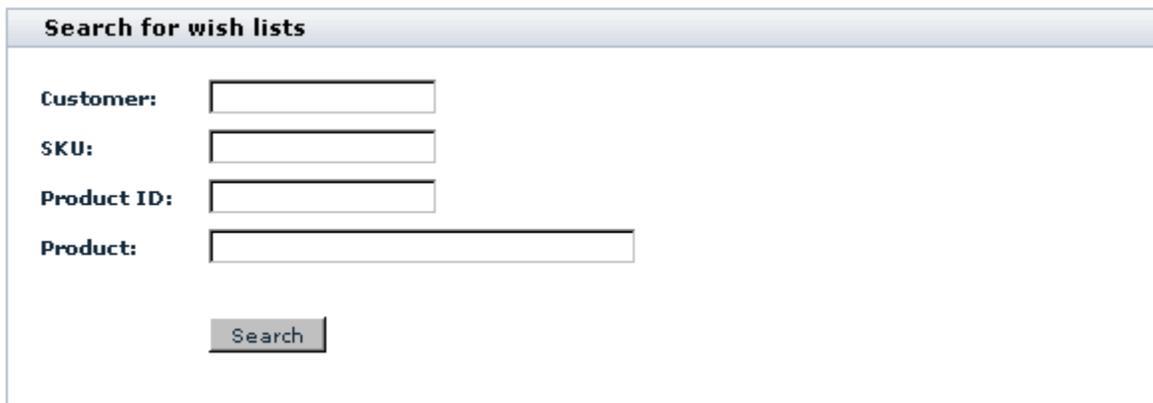
To access the 'Search for wish lists' section:

- (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
<a href="#">John Doe (customer)</a>	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> <a href="#">John Doe (customer)</a>			
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

Currently X-Cart provides official integration and support for more than 100 popular and reliable payment gateways. Some of these gateways are used worldwide while others are employed in a particular country or region only. To start accepting payments through a certain gateway or payment system in X-Cart you generally need to open an account with the gateway/system and then set it up in the X-Cart Admin area. This chapter of the manual provides a basic overview of top popular payment gateways and the instructions on how to set up these gateways in X-Cart.

The information is available for the following payment gateways (sorted alphabetically):

- [2Checkout](#)
- [Authorize.Net](#)
- [CyberSource](#)
- [eSELECTplus](#)
- [PayPal](#)
- [Sage Pay](#)
- [WorldPay](#)

For instructions on how to set up and use the Google Checkout payment gateway refer to the [Google Checkout](#) section of this manual.

## 11.1 2Checkout

2Checkout is a large international online payment provider with headquarters in the United States. It enables you to safely accept credit card and PayPal payment online without a need to buy and install an SSL certificate. 2Checkout offers its customers a simple commission fee structure, and operates in a large number of countries, which makes it popular among both U.S. and non-U.S. merchants.

### 11.1.1 Obtaining a 2Checkout Account

If you have not registered an account with 2Checkout yet, you should do it before you start setting up 2Checkout in X-Cart. To open an account, go to the 2Checkout website at <https://www.2checkout.com>.

[com/2co/signup](http://com/2co/signup) and follow the instructions on the screen. After you have registered an account, you can setup 2Checkout in the X-Cart Admin area.

## 11.1.2 Setting up 2Checkout

To use 2Checkout 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 *2Checkout* from the drop-down list and click the **Add** button.

Payment gateways	
Select the payment module to process customer credit cards	
Payment gateways	<input type="text" value="2Checkout"/> <input type="button" value="Add"/>

After you have clicked on **Add**, 2Checkout 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"/> 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="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"/> 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="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="2Checkout"/> Extra charge: <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>2Checkout</b> : <a href="#">Configure</a>   <a href="#">Delete</a>  Warning! 2Checkout 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 2Checkout.

### Settings

2Checkout.com account number:	<input type="text"/>
Secret word:	<input type="text"/>
Test/Live mode:	<input type="text" value="test"/>
Purchase routine:	<input type="text" value="Multi-Page Checkout"/>
Order prefix:	<input type="text"/>
Skip the order review page of the purchase routine:	<input type="checkbox"/>
Language:	<input type="text" value="English"/>

5. Adjust the configuration settings for 2Checkout and click the **Update** button to apply the changes.

- 2Checkout.com account number: Enter the name of your merchant account with 2Checkout.
- Secret word: Enter the secret word that is specified in your 2Checkout account.

It can be a single or compound word or a group of letters and numbers with no spaces. The word is used to encrypt order and customer data through an MD5 hash function. Make sure that the secret word you enter here coincides with the one in your 2Checkout back-office.

- 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 transactions. Money will not be withdrawn from credit cards. The "live" mode is the full functioning mode with real transactions and charges. It must be used only when you are ready to go live.

- Purchase routine: If your store sells intangible goods only, you can select *Single page checkout*, which is a scaled down version that only allows customers to pay for intangible goods with credit cards. If you still would like to give the customers the option of paying with PayPal, select the traditional *Multi-page checkout*.
- Order prefix: Enter a prefix that will be automatically added to IDs of orders placed in your store and paid through 2Checkout.

Having a prefix ensures that orders will have unique IDs, which will never coincide with orders placed in another online store of yours that also uses 2Checkout as a payment option.

- Skip the order review page of the purchase routine: Select the check box to skip extra order checking, or leave it unselected to allow your customers to review their orders before they proceed to checkout.
  - Language: Choose the language of the 2Checkout interface for your customers.
6. Return to the list of payment methods and activate 2Checkout by selecting the check box next to the gateway's name.
  7. Click the **Update** button.
  8. Adjust the configuration setting in the 2Checkout back-office.
    - a) Log in to your 2Checkout account at <https://www.2checkout.com/2co/login>
    - b) Open the Helpful links section and click **Look & Feel settings**.
    - c) Set the value of the option Direct Return? to Yes.
    - d) Set the Approved URL to `http://www.example.com/xcart/payment/cc_2conew.php` replacing the `http://www.example.com/xcart/` part with the true URL of your X-Cart store.
    - e) Specify a value of Your Secret Word, which can be a 16-character single or compound word or group of letters and numbers with no spaces.

After you have configured and activated the gateway, your customers will be able to choose 2Checkout as a payment option.

The screenshot shows the X-Cart checkout process. At the top, there is a navigation bar with four links: "Your cart", "Personal details", "Shipping & Payment", and "Place order". The "Shipping & Payment" link is highlighted. Below this, the "Shipping & Payment" section is displayed. It is divided into two columns: "Billing Address" and "Payment method".

**Billing Address:**  
PO BOX 1719  
Chicago  
Illinois  
United States  
60608

**Payment method:**

- 2Checkout**
- Money Order** US Banks Only
- Gift Certificate**

Below the payment methods, there is a "Modify" link and a "Continue" button.

## 11.2 Authorize.Net

Authorize.Net is a large U.S.-based payment gateway that allows you to accept online credit card and electronic check payments. The claimed user base of more than 230, 000 merchants makes it one of the largest internet payment service providers. X-Cart is currently integrated with two payment methods offered by Authorize.Net: Server Integration Method (SIM) and Advanced Integration Method (AIM). The major difference between the two methods is where you host the payment pages for you store.

A third Authorize.Net's payment option supported by X-Cart is Authorize.Net: AIM. eCheck, which is an implementation of Authorize.Net: AIM for electronic check payments.

### **Authorize.Net: SIM (Server Integration Method)**

With Authorize.Net: SIM the payment pages are hosted on the side of Authorize.Net, which means that Authorize.Net provides all the necessary resources to process a transaction, including collection of payment information. Customers get redirected to the Authorize.Net secure website and enter their card details there. Authorize.Net: SIM is a right solution if you do not have adequate resources to collect and transfer sensitive card details. For example, SIM does not require you to obtain and install an SSL certificate on your server/hosting account.

### **Authorize.Net: AIM (Advanced Integration Method)**

With Authorize.Net: AIM the payment pages are hosted together with the rest of the store. The data is transmitted to Authorize.Net in the background mode and customers never leave your website during the purchase. Since Authorize.Net: AIM involves collection and transmission of sensitive cardholder data, you must ensure the security of this data by setting up secure connection with Authorize.Net. Otherwise, Authorize.Net will reject the transaction.

Secure connection is implemented through an SSL certificate installed on your server/hosting account. For recommended SSL certificate providers please check the X-Cart marketplace at <http://marketplace.qtmsoft.com/> . Another requirement of Authorize.Net: AIM is that your server must provide support for at least one of the following HTTPS modules: Net::SSLeay, CURL, libCURL, OpenSSL or HTTPS-cli.

### **Authorize.Net: AIM. eCheck**

Authorize.Net: AIM. eCheck uses the same logic as Authorize.Net: AIM, but it is meant to process electronic check payments - not credit card payments. Like Authorize.Net: AIM, the eCheck implementation also requires an SSL certificate and one of the supported HTTPS modules.

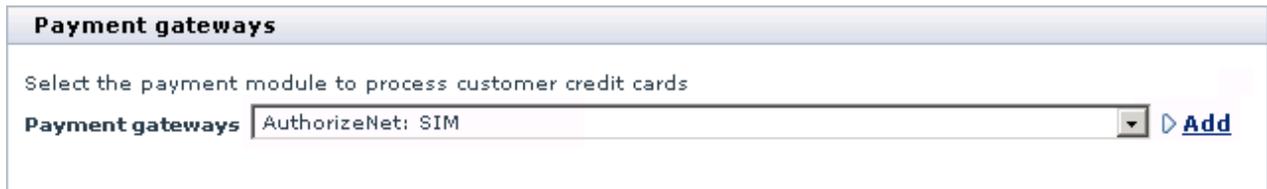
## 11.2.1 Obtaining an Authorize.Net Account

If you have not yet registered an account with Authorize.Net, you should do it before you start setting up Authorize.Net in X-Cart. To open an account, go to the Authorize.Net website at <http://www.authorize.net/signupnow/> and follow the instructions on the screen. After you have registered an account, you can set up Authorize.Net: SIM, Authorize.Net: AIM and Authorize.Net: AIM. eCheck in the X-Cart Admin area.

## 11.2.2 Setting up Authorize.Net: SIM

To use Authorize.Net: SIM 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 *Authorize.Net: SIM* 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**, Authorize: SIM 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"/>	Credit Card Extra charge: <input type="text" value="0.00"/> \$ <input type="checkbox"/> Cash on delivery method	Visa, Mastercard, American Express  	HTTP	All Premium Wholesale	<input type="text" value="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	<input type="text" value="0"/>
<input checked="" type="checkbox"/>	Gift Certificate	 	HTTP	All Premium Wholesale	<input type="text" value="15"/>
<input type="checkbox"/>	AuthorizeNet: SIM Extra charge: <input type="text" value="0.00"/> \$	 	HTTP	All Premium Wholesale	<input type="text" value="999"/>
Credit Card processor <b>AuthorizeNet: SIM</b> : <a href="#">Configure</a>   <a href="#">Delete</a>  Warning! AuthorizeNet: SIM 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 Authorize.Net: SIM.

**Settings**

Valid Referrer URL:	<input type="text" value="http://www.example.com/xcart/payment/cc_authorizenet_sim.php"/>
Relay URL:	<input type="text" value="http://www.example.com/xcart/payment/cc_authorizenet_sim.php"/>
API Login ID:	<input type="text"/>
Transaction key:	<input type="text"/>
The difference between your server time and the Authorize.Net server time (in seconds) *:	<input type="text" value="0"/>
Currency:	<input type="text" value="Afghani (Afghanistan)"/>
Test/Live mode:	<input type="text" value="test"/>
Order prefix:	<input type="text"/>
Action to be performed on order placement:	<input type="text" value="Auth and Capture"/>

5. Adjust the configuration settings for Authorize.Net: SIM and click the **Update** button to apply the changes.

- Valid Referrer URL: The URL from which Authorize.Net: SIM will receive data from X-Cart.

**Important:** Authorize.Net uses the URL to check whether the payment request is sent by your store, not a fake website. Make sure the URL in the X-Cart Admin area coincides with the respective URL in the Authorize.Net back-office.

- Relay URL: The URL to which Authorize.Net must land customers back to X-Cart after a payment has been processed.
- API Login ID: Enter the name of your merchant account with Authorize.Net.
- Transaction key: Enter your Authorize.Net transaction key.

To obtain a key:

- a) Log in to your Authorize.Net account at <https://account.authorize.net/>
- b) In the main menu, click Settings and Profile.
- c) In the Security section, click Obtain Transaction Key.
- d) Enter the answer to the Secret Question configured at account setup.

- The difference between your server time and the Authorize.Net server time (in seconds): Enter the number of seconds between your server time and Authorize.Net server time.

Each time X-Cart performs a SIM transaction, Authorize.Net generates a new fingerprint to authenticate the transaction. Among other parameters, the fingerprint also includes a timestamp of when the fingerprint was generated. The timestamp must coincide with the time of the Authorize.Net server, which uses Greenwich Mean Time (GMT).

Sure, your server is likely use a local time zone that is different to GMT. To ensure successful authentication, you must iron out the difference in server time by adjusting the value of this field. The value must be setup in seconds. Although it is not required that the difference is covered to the last second, it must be no more than 15 minutes ahead, or 15 minutes behind the Authorize.Net server time (GMT). Otherwise, authentication will fail.

For example, if your server uses a local time zone GMT +2, the value must be 7200, which is equal to the number of seconds in 2 hours; if your server uses a local time zone GMT -6, the value must be -21600, which is equal to the number of seconds in 6 hours, and the minus sign indicates that the time must be subtracted from GMT. Also, be sure to account for daylight savings time.

- Currency: Choose the currency in which you wish to accept payments through Authorize.Net: SIM.
- 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 "live" mode is the full functioning mode with real transactions and charges. It must be used when only you are ready to go live.

**Note:** When you choose to use the "live" mode, be sure to enable the "live" mode in your Authorize.Net account as well.

- Order prefix: Enter a prefix that will be automatically added to IDs of orders placed in your store and paid through Authorize.Net: SIM.

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 Authorize.Net as a payment option.

- Action to be performed on order placement: Choose whether Authorize.Net 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*).

6. Return to the list of payment methods and activate Authorize.Net: SIM by selecting the check box next to the gateway's name.

7. Click the **Update** button.

8. Adjust the configuration setting in the Authorize.Net back-office.
  - a) Log in to your Authorize.Net account at <https://account.authorize.net/> .
  - b) Go to the section Settings -> Response/Receipt URLs.
  - c) Click the **Add URL** button and enter the URL from the Valid Referrer URL field of the Authorize.Net configuration page.
  - d) Make sure the following parameters are set up in the section Settings -> Direct Response:
    - Direct Response Delimited Response = Yes;
    - Default Field Separator = , (comma).

After you have configured and activated the gateway, your customers will be able to choose Authorize.Net: SIM as a payment option.

The screenshot displays the checkout process in X-Cart. At the top, a navigation bar includes a shopping cart icon and four links: 'Your cart', 'Personal details', 'Shipping & Payment', and 'Place order'. The 'Shipping & Payment' section is highlighted. Below this, there are two main sections: 'Billing Address' and 'Payment method'. The 'Billing Address' section contains the text: 'PO BOX 1719', 'Chicago', 'Illinois', 'United States', and '60608'. Below the address is a blue 'Modify' link. The 'Payment method' section has three radio button options: 'AuthorizeNet: SIM' (which is selected), 'Money Order' (with 'US Banks Only' to its right), and 'Gift Certificate'. At the bottom of the form is a yellow 'Continue' button.

### 11.2.3 Setting up Authorize.Net: AIM

To use Authorize.Net: AIM 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 *Authorize.Net: AIM* 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**, Authorize: AIM 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="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"/>	<input type="text" value="HTTP"/>	<input type="text" value="All"/> <input type="text" value="Premium"/> <input type="text" value="Wholesale"/>	<input type="text" value="15"/>
<input type="checkbox"/>	<input type="text" value="AuthorizeNet: AIM"/> Extra charge: <input type="text" value="0.00"/> \$	<input type="text"/>	<input type="text" value="HTTP"/>	<input type="text" value="All"/> <input type="text" value="Premium"/> <input type="text" value="Wholesale"/>	<input type="text" value="999"/>

Credit Card processor **AuthorizeNet: AIM**: [Configure](#) | [Delete](#)

 Warning! AuthorizeNet: AIM currently set up to work in test mode!

4. Click on the [Configure](#) link. This opens the configuration page for Authorize.Net: AIM.

### Settings



Account type:

API Login ID:

Transaction key:

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:

5. Adjust the configuration settings for Authorize.Net: AIM and click the **Update** button to apply the changes.

- Account type: Choose Authorize.Net.
- API Login ID: Enter the name of your merchant account with Authorize.Net.
- Transaction key: Enter your Authorize.Net transaction key.

To obtain a key:

- a) Log in to your Authorize.Net account at <https://account.authorize.net/>
- b) In the main menu, click Settings and Profile.
- c) In the Security section, click Obtain Transaction Key.
- d) Enter the answer to the Secret Question configured at account setup.

- MD5 hash value: Enter the MD5 Hash value.

MD5 Hash value is used to authenticate that a transaction response comes exactly from Authorize.Net, not a fake website or server. Make sure that the MD5 Hash value you enter here coincides with the one in your Authorize.Net back-office.

- 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 "live" mode is the full functioning mode with real transactions and charges. It must be used when only you are ready to go live.

**Note:** When you choose to use the "live" mode, be sure to enable the "live" mode in your Authorize.Net account as well.

- Order prefix: Enter a prefix that will be automatically added to IDs of orders placed in your store and paid through Authorize.Net: AIM.

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 Authorize.Net as a payment option.

- Action to be performed on order placement: Choose whether Authorize.Net 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*).

6. Return to the list of payment methods and activate Authorize.Net: AIM 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 Authorize.Net: AIM as a payment option.

The screenshot displays the checkout process in X-Cart. At the top, there is a navigation bar with a shopping cart icon and four tabs: "Your cart", "Personal details", "Shipping & Payment", and "Place order". The "Shipping & Payment" tab is currently selected. Below the navigation bar, the "Shipping & Payment" section is visible. It is divided into two columns: "Billing Address" and "Payment method".

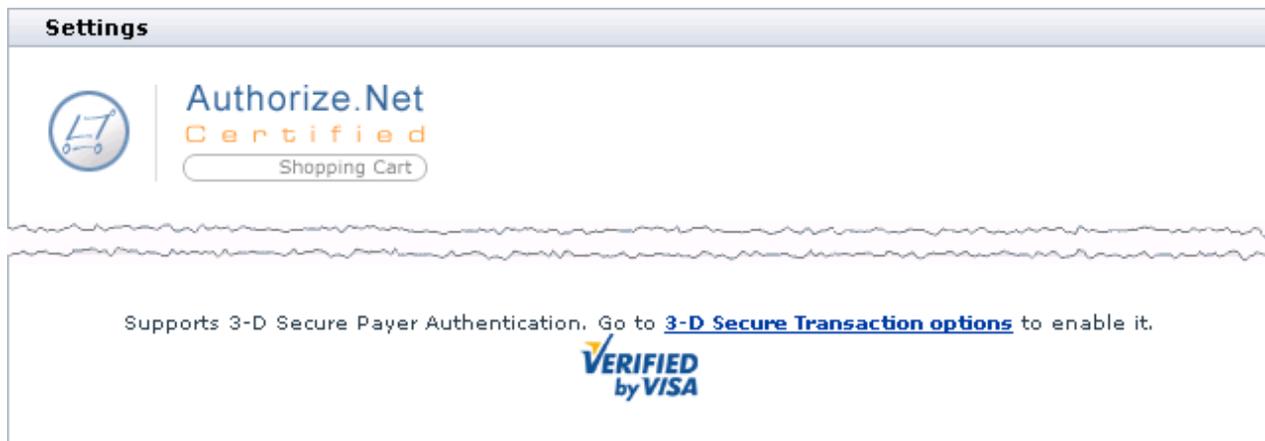
**Billing Address:** PO BOX 1719, Chicago, Illinois, United States, 60608. A "Modify" link is provided below the address.

**Payment method:** Three options are listed with radio buttons: "AuthorizeNet: AIM" (which is selected), "Money Order US Banks Only", and "Gift Certificate".

A "Continue" button is located at the bottom center of the form.

### 3-D Secure

Pay attention that Authorize.Net: AIM supports the 3-D Secure protocol adopted by *Verified by Visa* and *MasterCard SecureCode* security initiatives. 3-D Secure is used as an additional authentication tool that improves the security of online credit card payments. In X-Cart, 3D Secure is supported through Cardinal Centinel, the integrated authentication platform by CardinalCommerce Corp. Before you can start using 3-D Secure you must first set up Cardinal Centinel in the 3-D Secure Transaction options section of the Admin area (General Settings -> 3-D Secure Transaction options). A direct link to the section is also available at the Authorize.Net: AIM configuration page.



Instructions on how to set up Cardinal Centinel are available in the [3-D Secure Payment Authentication](#) section of this manual.

## 11.2.4 Setting up Authorize.Net: AIM.eCheck

To use Authorize.Net: AIM.eCheck 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 *Authorize.Net: AIM.eCheck* from the drop-down list and click the **Add** button.



After you have clicked on **Add**, Authorize: AIM.eCheck 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"/> 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="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"/> 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="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="AuthorizeNet.eCheck"/> Extra charge: <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 processor <b>AuthorizeNet.eCheck</b> : <a href="#">Configure</a>   <a href="#">Delete</a>  Warning! AuthorizeNet.eCheck is currently set up to work in test mode!					
<input type="button" value="Update"/>					

- Click on the [Configure](#) link. This opens the configuration page for Authorize.Net: AIM.eCheck.

**Settings**  
  
Account type:   
  
Login:   
  
Transaction key:   
  
Currency:   
  
MD5 hash value:   
  
Test/Live mode:   
  
Order prefix:

5. Adjust the configuration settings for Authorize.Net: AIM.eCheck and click the **Update** button to apply the changes.

- Account type: Choose Authorize.Net.
- Login: Enter the name of your merchant account with Authorize.Net.
- Transaction key: Enter your Authorize.Net transaction key.

To obtain a key:

- a) Log in to your Authorize.Net account at <https://account.authorize.net/>
- b) In the main menu, click Settings and Profile.
- c) In the Security section, click Obtain Transaction Key.
- d) Enter the answer to the Secret Question configured at account setup.

- Currency: Choose the currency in which you wish to accept payments through Authorize.Net: AIM.eCheck.
- MD5 hash value: Enter the MD5 Hash value.

MD5 Hash value is used to authenticate that a transaction response comes exactly from Authorize.Net, not a fake website or server. Make sure that the MD5 Hash value you enter here coincides with the one in your Authorize.Net back-office.

- 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 "live" mode is the full functioning mode with real transactions and charges. It must be used when only you are ready to go live.

**Note:** When you choose to use the "live" mode, be sure to enable the "live" mode in your Authorize.Net account as well.

- Order prefix: Enter a prefix that will be automatically added to IDs of orders placed in your store and paid through Authorize.Net: AIM.eCheck.

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 Authorize.Net as a payment option.

6. Return to the list of payment methods and activate Authorize.Net: AIM.eCheck 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 Authorize.Net: AIM.eCheck as a payment option.

The screenshot shows the checkout process in X-Cart. At the top, there is a navigation bar with a shopping cart icon and four links: [Your cart](#), [Personal details](#), [Shipping & Payment](#) (which is underlined and highlighted), and [Place order](#). Below this, the 'Shipping & Payment' section is displayed. It is divided into two columns: 'Billing Address' and 'Payment method'. The 'Billing Address' column contains the text: PO BOX 1719, Chicago, Illinois, United States, 60608. Below this is a [Modify](#) link. The 'Payment method' column has three radio button options:  **AuthorizeNet.eCheck**,  **Money Order** (with 'US Banks Only' to its right), and  **Gift Certificate**. At the bottom center of the form is a yellow **Continue** button.

## 11.3 CyberSource

CyberSource is one of the largest global payment gateways and merchant services providers with headquarters in the United States, United Kingdom and Japan. CyberSource provides several different options for accepting payments online. X-Cart is currently integrated with the following solutions: CyberSource Hosted Order Page (HOP) and CyberSource SOAP toolkit API. The major difference between the two options is where you host the payment pages for you store.

### CyberSource Hosted Order Page

With CyberSource Hosted Order Page you completely outsource the payment pages with CyberSource, which enables you to processes payments without the risk of handling or storing sensitive cardholder data. Since customers get redirected to the CyberSource secure website and enter their card details there, you do not need to obtain and install an SSL certificate.

### CyberSource SOAP toolkit API

With CyberSource SOAP toolkit API the payment pages are hosted with the rest part of the store. The data is transmitted to CyberSource in the background mode and customers never leave your website during the purchase. Since the connection method uses SSL encryption, you must obtain and install an SSL certificate to your server/hosting account. For recommended SSL certificate providers please check the X-Cart marketplace at <http://marketplace.qtmsoft.com/> . Another requirement is that your server must provide support for any of the following HTTPS modules: Net::SSLay, CURL, libCURL, OpenSSL or HTTPS-cli.

### 11.3.1 Obtaining a CyberSource Account

If you have not registered an account with CyberSource yet, you should do it before you start setting up CyberSource in X-Cart. For instructions on how to open an account contact a CyberSource representative using the form at [http://www.cybersource.com/contact\\_us/](http://www.cybersource.com/contact_us/) . After you have registered an account, you can set up CyberSource Hosted Order Page (HOP) and CyberSource SOAP toolkit API in the X-Cart Admin area.

### 11.3.2 Setting up CyberSource Hosted Order Page

To use CyberSource Hosted Order Page as one of the payment options in the store:

1. Log in to the X-Cart Admin area.

- Go to the Payment methods section (Administration menu -> Payment methods) and scroll down to the Payment gateways form.
- Select *CyberSource (hosted page)* 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**, CyberSource Hosted Order Page 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"/>	Credit Card Extra charge: <input type="text" value="0.00"/> \$ <input type="text"/> <input type="checkbox"/> Cash on delivery method	Visa, Mastercard, American Express	HTTI	All Premium Wholesale	0
<input checked="" type="checkbox"/>	Check Extra charge: <input type="text" value="0.00"/> \$ <input type="text"/> <input type="checkbox"/> Cash on delivery method	Check payment	HTTI	All Premium Wholesale	0
<input checked="" type="checkbox"/>	Gift Certificate		HTTI	All Premium Wholesale	15
<input type="checkbox"/>	CyberSource (hosted page) Extra charge: <input type="text" value="0.00"/> \$ <input type="text"/>		HTTI	All Premium Wholesale	999

Credit Card processor **CyberSource (hosted page)**: [Configure](#) | [Delete](#)

 Warning! CyberSource (hosted page) is currently set up to work in test mode!

- Click on the [Configure](#) link. This opens the configuration page for CyberSource Hosted Order Page.

### Settings

Currency:	<input type="text" value="Andorran Pesseta (ADP)"/>
Test/Live mode:	<input type="text" value="test"/>
Action to be performed on order placement:	<input type="text" value="Auth and Capture"/>
Order prefix:	<input type="text"/>
<hr/>	
Merchant ID:	<input type="text"/>
Serial number:	<input type="text"/>
Public key:	<input type="text"/>
Secret key:	<input type="text"/>
<hr/>	
Upload security script:	<input type="text"/> <input type="button" value="Browse..."/>
<input type="button" value="Update"/>	

5. Adjust the configuration settings for CyberSource Hosted Order Page and click the **Update** button to apply the changes.

- **Currency:** Choose the currency in which you wish to accept payments through CyberSource Hosted Order Page.
- **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 "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 CyberSource Hosted Order Page 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 CyberSource Hosted Order Page.

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 CyberSource as a payment option.

The values of the next 4 fields are supposed to be retrieved automatically from the security script generated on the side of CyberSource. To generate a script, log in to your CyberSource account at <https://ebc.cybersource.com/> and go to Tools & Settings -> Hosted Order Page -> Security -> Generate Security Script. There select a radio button PHP, which stands for the respective scripting language, click Submit, and follow the instructions on the screen. As a result, you must be able to download a file HOP.php onto your local computer. The file should then be uploaded through the X-Cart Admin area. The fields mean as follows:

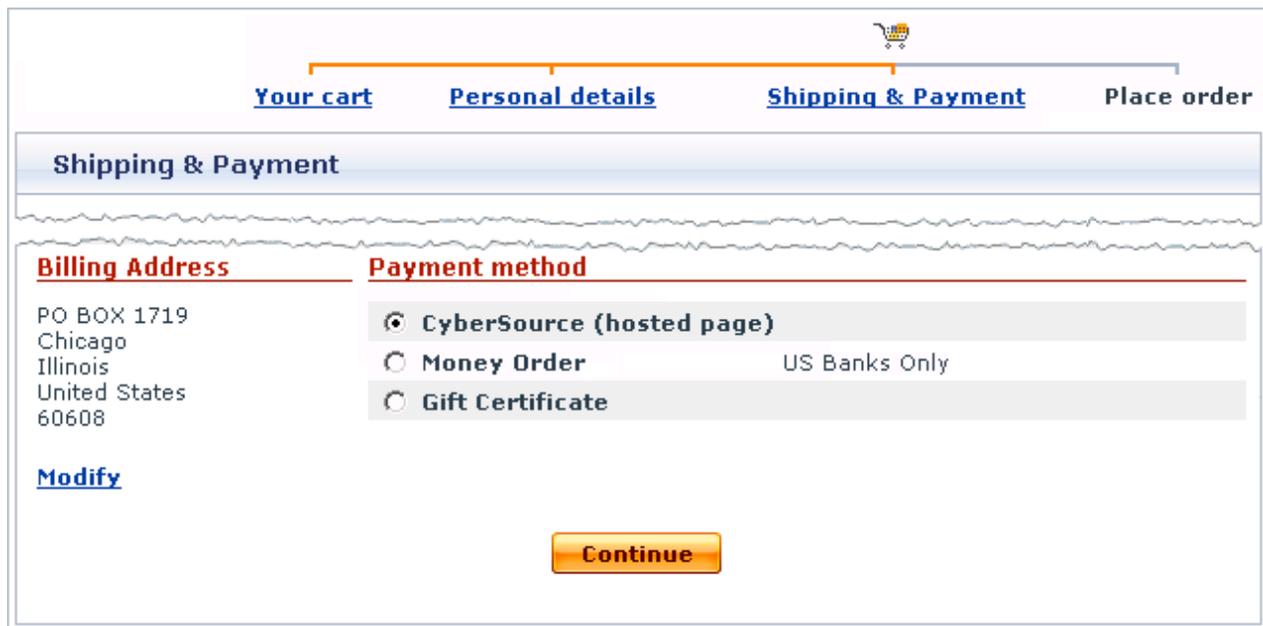
- Merchant ID: The name of your merchant account with CyberSource.
- Serial number: A unique code assigned to the security script to ensure its integrity.
- Public key and Secret key: Cryptographic keys.

These two keys are used to encrypt/decrypt requests and responses via the public-key cryptography method. Public-key cryptography is a cryptographic approach employed by CyberSource that uses different keys to encrypt and decrypt messages: Each party uses a pair of keys - a public key and a private key; the public key is used to decrypt messages, and it is distributed freely, the private key is used to decrypt messages encrypted with the public key, and it must be kept in secret. In CyberSource, a secret key is an implementation of a private key.

6. Return to the list of payment methods and activate CyberSource Hosted Order Page 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 CyberSource Hosted Order Page 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**

**CyberSource (hosted page)**

**Money Order**      US Banks Only

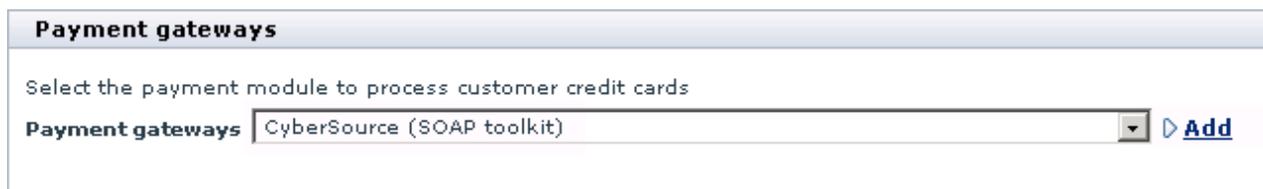
**Gift Certificate**

[Continue](#)

### 11.3.3 Setting up CyberSource SOAP Toolkit API

To use CyberSource SOAP toolkit API 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 *CyberSource (SOAP toolkit)* from the drop-down list and click the **Add** button.



**Payment gateways**

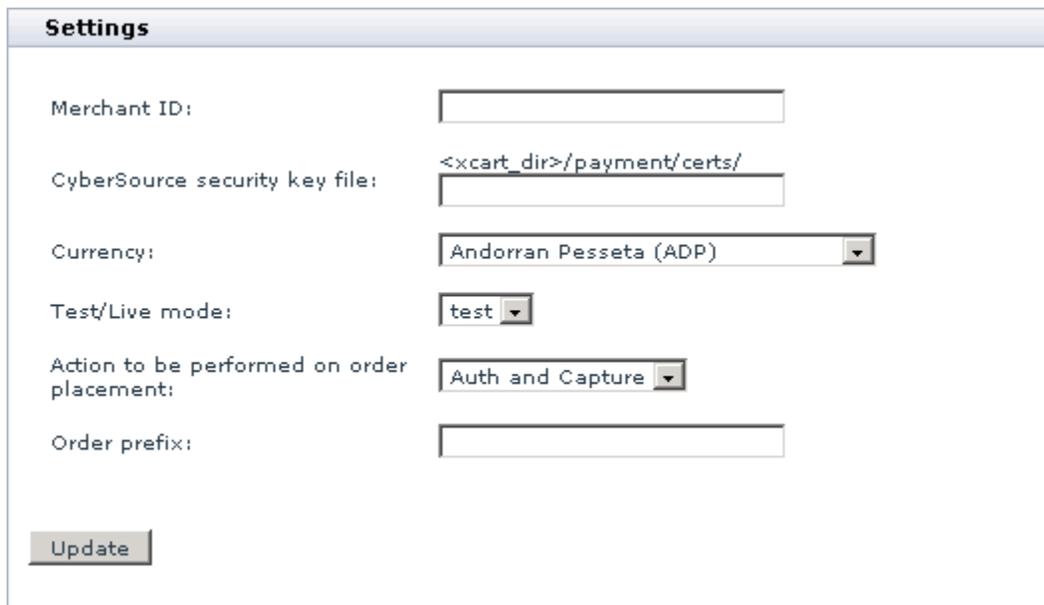
Select the payment module to process customer credit cards

Payment gateways:  [Add](#)

After you have clicked on **Add**, CyberSource SOAP toolkit API 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"/>	Credit Card Extra charge: <input type="text" value="0.00"/> \$ <input type="checkbox"/> Cash on delivery method	Visa, Mastercard, American Express  	HTTP	All Premium Wholesale	<input type="text" value="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	<input type="text" value="0"/>
<input checked="" type="checkbox"/>	Gift Certificate	 	HTTP	All Premium Wholesale	<input type="text" value="15"/>
<input type="checkbox"/>	CyberSource (SOAP toolkit) Extra charge: <input type="text" value="0.00"/> \$	 	HTTP	All Premium Wholesale	<input type="text" value="999"/>
Credit Card processor <b>CyberSource (SOAP toolkit)</b> : <a href="#">Configure</a>   <a href="#">Delete</a>  Warning! CyberSource (SOAP toolkit) 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 CyberSource SOAP toolkit API.



The screenshot shows a 'Settings' form with the following fields and values:

- Merchant ID:
- CyberSource security key file:
- Currency:  (dropdown menu)
- Test/Live mode:  (dropdown menu)
- Action to be performed on order placement:  (dropdown menu)
- Order prefix:

An 'Update' button is located at the bottom left of the form.

5. Adjust the configuration settings for CyberSource SOAP toolkit API and click the **Update** button to apply the changes.

- **Merchant ID:** Enter the name of your merchant account with CyberSource.
- **CyberSource security key file (full path with filename):** Specify the exact location and the filename of a file with the security key for the SOAP Toolkit API.

The file must be located on the file system together with X-Cart, and the location must be specified as a relative path as a relative path in the `<xcart_dir>/payment/certs/` directory.

If you do not yet have a file with a security key, generate it in the CyberSource back-office:

- a) Log in to the CyberSource account.
- b) Go to the section Account Management -> Transaction Security Keys -> Security Keys for the SOAP Toolkit API.
- c) Click the Generate button.
- d) Click the Download button to download a file with the key onto your local computer.

After you have generated the file and downloaded it to your local computer, upload the file to the server where X-Cart is installed. The file is named like `CyberSourceKey_XXXXXXXXXXXX.txt` where `x` means a number. An example file is contained in `<xcart_dir>/payments/certs/cybersource-demo-key.txt`.

- **Currency:** Choose the currency in which you wish to accept payments through CyberSource SOAP toolkit API.

- 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 "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 CyberSource SOAP toolkit API 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 CyberSource SOAP toolkit API.

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 CyberSource as a payment option.

6. Return to the list of payment methods and activate CyberSource SOAP toolkit API 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 CyberSource SOAP toolkit API as a payment option.

[Your cart](#)   [Personal details](#)   [Shipping & Payment](#)   [Place order](#)

### Shipping & Payment

<u>Billing Address</u>	<u>Payment method</u>
PO BOX 1719 Chicago Illinois United States 60608  <a href="#">Modify</a>	<input checked="" type="radio"/> <b>CyberSource (SOAP toolkit)</b> <input type="radio"/> <b>Money Order</b> US Banks Only <input type="radio"/> <b>Gift Certificate</b>

[Continue](#)

## 11.4 eSELECTplus

eSELECTplus is an online transaction processing engine by a Canadian payment processor Moneris Solutions Corp. eSELECTplus is one of the largest payment gateways in North America, which enables you to accept payments by major credit cards in both Canadian and U.S. dollars. X-Cart is currently integrated with two payment methods offered by eSELECTplus: eSELECTplus Application Program Interface (API) and eSELECTplus Secure Payment Page. The major difference between the two methods is where you host the payment pages for you store.

### eSELECTplus Secure Payment Page

With eSELECTplus Secure Payment Page the payment pages are hosted on the side of Moneris, and Moneris provides all the necessary resources to process a transaction, including collection of payment information. Customers get redirected to a secure payment page and enter their card details there. There is no need to purchase an SSL certificate as all cardholder information is captured and protected by Moneris.

### eSELECTplus Application Program Interface (API)

With eSELECTplus API the payment pages are hosted with the rest part of the store. The data is transmitted to Moneris in the background mode and customers never leave your website during the purchase. Since eSELECTplus API involves collection and transmission of sensitive cardholder data, you must ensure the security of this data by setting up secure connection with eSELECTplus. Otherwise, Moneris will reject the transaction.

Secure connection is implemented through an SSL certificate installed on your server/hosting account. For recommended SSL certificate providers please check the X-Cart marketplace at <http://marketplace.qtmssoft.com/>. Another requirement of eSELECTplus API is that your server must provide support for any of the following HTTPS modules: Net::SSLay, CURL, libCURL, OpenSSL or HTTPS-cli.

### 11.4.1 Obtaining a Moneris/eSELECTplus Account

If you have not yet registered an account with Moneris, you should do it before you start setting up eSELECTplus in X-Cart. To open an account, go to the Moneris website at <https://www3.moneris.com/connect/en/signup/index.php> and follow the instructions on the screen. After you have registered an account, you can set up eSELECTplus Application Program Interface (API) and eSELECTplus Secure Payment Page in the X-Cart Admin area.

## 11.4.2 Setting up eSELECTplus Secure Payment Page

To use eSELECTplus Secure Payment Page 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 *eSelect Plus (hosted pages)* 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**, eSELECTplus Secure Payment Page 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"/> 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="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"/> 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="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="eSelect Plus (hosted page)"/> Extra charge: <input type="text" value="0.00"/> \$ <input type="checkbox"/> Cash on delivery method	<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 **eSelect Plus (hosted page)**: [Configure](#) | [Delete](#)

 Warning! eSelect Plus (hosted page) is currently set up to work in test mode!

4. Click on the [Configure](#) link. This opens the configuration page for eSELECTplus Secure Payment Page.

Settings	
Approve/Decline/Cancel URL:	<input type="text" value="http://www.example.com/xcart/payment/cc_eselect_form.php"/>
Store ID:	<input type="text"/>
Secret key:	<input type="text"/>
Test/Live mode:	<input type="text" value="test"/>
Order prefix:	<input type="text"/>

5. Adjust the configuration settings for eSELECTplus Secure Payment Page and click the **Update** button to

apply the changes.

- **Approved/Declined/Cancel URL:** The URL from which Moneris will receive data from X-Cart.

**Important:** Moneris uses the URL to check whether the payment request is sent by your store, not a fake website. Make sure that all URLs in the Moneris back-office coincide with the URL in the X-Cart admin area.

- **Store ID:** Enter the name of your merchant account with Moneris (the one you use to log in to back-office for eSELECTplus).
- **Secret key:** Enter the secret key from the Moneris back-office.

The key is used to encrypt order and customer data. Make sure the secret key you enter here coincides with the one in the Moneris back-office.

- **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 "live" mode is the full functioning mode with real transactions and charges. It must be used when only you are ready to go live.

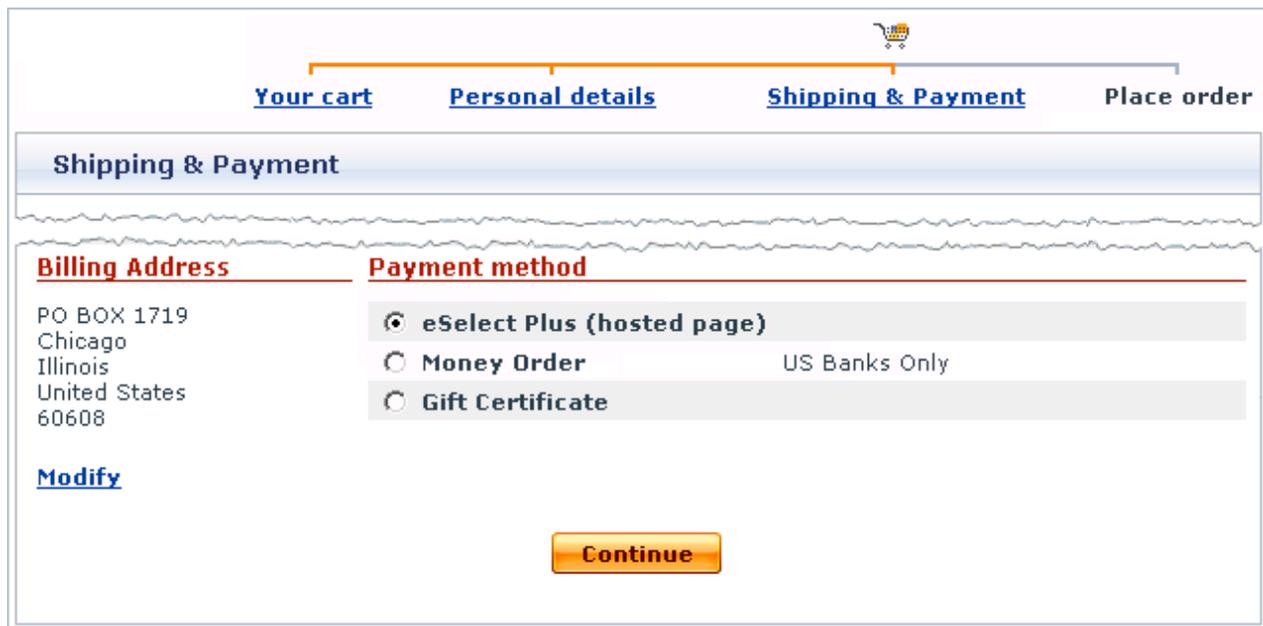
- **Order prefix:** Enter a prefix that will be automatically added to IDs of orders placed in your store and paid through eSELECTplus Secure Payment Page.

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 eSELECTplus as a payment option.

6. Return to the list of payment methods and activate eSELECTplus Secure Payment Page 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 eSELECTplus Secure Payment Page 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**

**eSelect Plus (hosted page)**

**Money Order**      US Banks Only

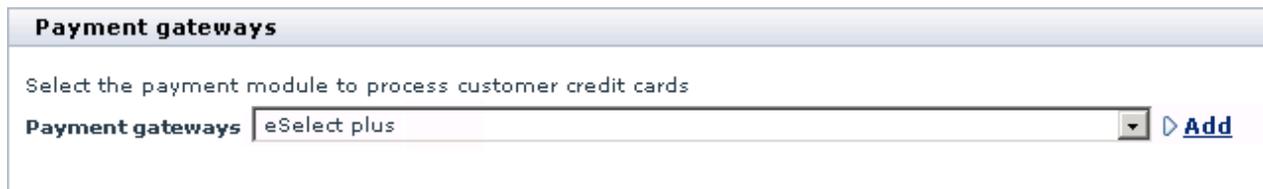
**Gift Certificate**

[Continue](#)

### 11.4.3 Setting up eSELECTplus API

To use eSELECTplus Application Program Interface (API) 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 *eSelect plus* 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**, eSELECTplus API 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"/>	Credit Card Extra charge: <input type="text" value="0.00"/> \$ <input type="checkbox"/> Cash on delivery method	Visa, Mastercard, American Express  	HTTP	All Premium Wholesale	<input type="text" value="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	<input type="text" value="0"/>
<input checked="" type="checkbox"/>	Gift Certificate	 	HTTP	All Premium Wholesale	<input type="text" value="15"/>
<input type="checkbox"/>	eSelect plus Extra charge: <input type="text" value="0.00"/> \$	 	HTTP	All Premium Wholesale	<input type="text" value="999"/>
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!					
<input type="button" value="Update"/>					

4. Click on the [Configure](#) link. This opens the configuration page for eSELECTplus API.

### Settings

Store ID:	<input type="text"/>
API Token:	<input type="text"/>
Account type:	<input type="text" value="USA"/>
Test/Live mode:	<input type="text" value="test"/>
Order prefix:	<input type="text"/>
Action to be performed on order placement:	<input type="text" value="Auth and Capture"/>
3d secure:	<input type="text" value="On"/>

**Note:** A PCI compliance certificate is required for Direct Post.

Supports 3-D Secure Payer Authentication.



5. Adjust the configuration settings for eSELECTplus API and click the **Update** button to apply the changes.

- Store ID: Enter the name of your merchant account with Moneris (the one you use to log in to back-office for eSELECTplus).
- API Token: Enter the value of the API Token from your Moneris account.

If you do not know the value, log in to the eSELECTplus back-office at <https://www3.moneris.com/mpg/> and go to Admin -> Store Setting. The API Token will be displayed on the screen. It is recommended that you copy and paste the value.

- Account type: Select your account type (*USA* or *Canada*).
- 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 "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 eSELECTplus API.

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 eSELECTplus as a payment option.

- Action to be performed on order placement: Choose whether Authorize.Net 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*).
- 3d secure: Choose whether you wish to use the 3D Secure checking.

3-D 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 3-D Secure checking mechanism is completely ensured by CyberSource, and it does not relate to the X-Cart's 3D Secure Payment Authentication.

6. Return to the list of payment methods and activate eSELECTplus API by selecting the check box next to the gateway's name.
7. Click the **Update** button.
8. Adjust the configuration setting in your Moneris account (the back-office for eSELECTplus).
  - a) Log in to the gateway's back-office at <https://www3.moneris.com/mpg/> .
  - b) Go to the section Admin -> Directpost config.
  - c) Choose to generate a new configuration or press the Edit button, which opens an existing configuration for editing.
  - d) In the Response Method, select the check box Displayed as key/value pairs on our server. Leave the default values of other fields.

After you have configured and activated the gateway, your customers will be able to choose eSELECTplus API as a payment option.

**Shipping & Payment**

<b>Billing Address</b>	<b>Payment method</b>
PO BOX 1719 Chicago Illinois United States 60608  <a href="#">Modify</a>	<input checked="" type="radio"/> <b>eSelect plus</b> <input type="radio"/> <b>Money Order</b> US Banks Only <input type="radio"/> <b>Gift Certificate</b>

**Continue**

## 11.5 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](#)'.

### 11.5.1 X-Cart's PayPal Integration Overview

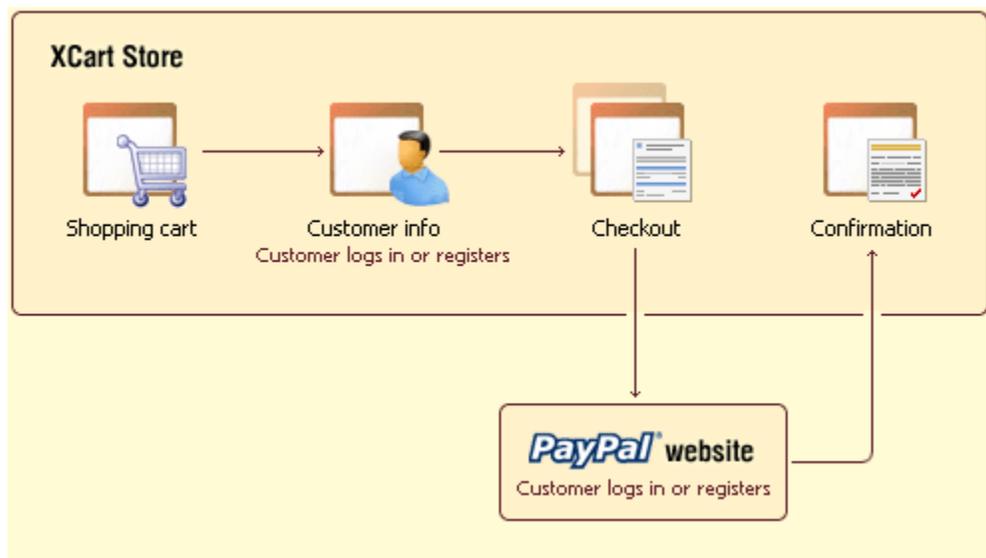
X-Cart supports the following PayPal solutions:

- 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

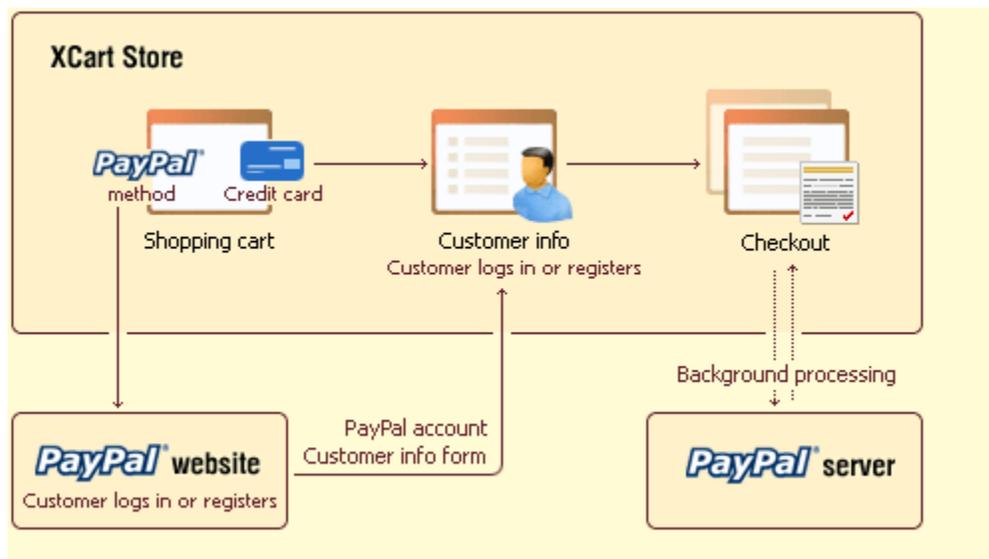
Website Payments Pro is a PayPal solution currently available only to US and Canadian merchants. It is an advanced solution composed of two payment capabilities: credit card processing with Direct Payment and PayPal payment processing with Express Checkout.

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 and Canada.

### **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.

## **11.5.2 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'](#).

### 11.5.2.1. 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:

[http://www.paypal.com/cgi-bin/webscr?cmd=\\_merchant-outside](http://www.paypal.com/cgi-bin/webscr?cmd=_merchant-outside) for the US and Canadian website,

[https://www.paypal.com/uk/cgi-bin/webscr?cmd=\\_merchant-outside](https://www.paypal.com/uk/cgi-bin/webscr?cmd=_merchant-outside) for the UK website.

2. Select a PayPal solution that you would like to use (Website Payments Standard / Website Payments Pro) and click the 'Sign Up' link below its name. You may also click the 'Sign Up' link at the top of the page and choose a PayPal solution later.

**Note:** If you wish to use Express Checkout as an additional payment option, you should select Website Payments Pro, but you do not need to submit the Website Payments Pro application and do not need to complete the Pro billing agreement.

3. Choose a Business account.
4. Select the country or region where you live from the drop-down menu.
5. Provide the information required to set up a Business account (account/business owner name, address, email, business name and address, customer service information).
6. Confirm the email address that you used for sign up (Check your email inbox. Click the link in the PayPal confirmation email. Enter your password and click 'Confirm'.)
7. Add and confirm a bank account to become a Verified member. The process may take up to 3-5 business days.

If you already have a Personal or Premier PayPal account and wish to upgrade to a Business account:

1. (US and Canada merchants): Point your browser to <https://www.paypal.com/cgi-bin/webscr?>

[cmd=\\_registration-run.](#)

(UK merchants): Point your browser to [https://www.paypal.com/uk/cgi-bin/webscr?cmd=\\_registration-run](https://www.paypal.com/uk/cgi-bin/webscr?cmd=_registration-run).

2. Click the 'Upgrade your account' link in the yellow box towards the upper right hand corner:



3. Click the 'Upgrade Now' button.
4. Follow the instructions to upgrade to a Business account.
5. Add and confirm a bank account to become a Verified member. The process may take up to 3-5 business days.

### 11.5.2.2. 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.

### 11.5.2.3. 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'.

If you select API Signature, your credentials will simply be provided to you on the next page. From now on, they will be stored in your profile ('Profile' subtab->'API Access' link->'View or Remove Credentials').

If you select API SSL client-side certificate, your API Username and API Password will be provided to you on the next page the same way as if you had requested an API Signature, while the API Certificate will need to be downloaded. To download your API certificate, click the 'Download Certificate' button on the 'Download or Remove API Certificate' page. You will be prompted to download a file called `cert_key_pem.txt`. This file is your API Certificate. You will need to put this file in `<xcart_dir>/payment/certs/`.

## 11.5.2.4. 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 (Settings 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, Mastercard, 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](#)').

### 11.5.2.5. 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 email 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 Che Extra charge: 0.00 \$		HTTP	All Premium Wholesale	999
Payment systems <b>PayPal Pro</b> : Configure   Delete					
<input checked="" type="checkbox"/>	PayPal Pro: DirectPayme Extra charge: 0.00 \$		HTTP	All Premium Wholesale	999
Payment system <b>PayPal Pro</b> : Configure   Delete					

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](#).

### 11.5.2.6. 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.

### 11.5.2.7. 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.

## 11.5.3 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](#)'.

### 11.5.3.1. 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.

### 11.5.3.2. 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:**

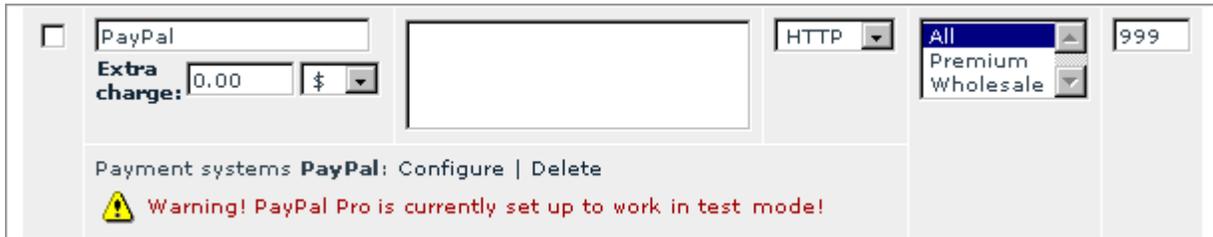
1. Log in to your Sandbox Business account to obtain API credentials for the test mode (The Sandbox Business account backoffice is organized similarly to the backoffice of your production PayPal Business account, so API credentials for the test mode can be obtained the same way as described in the section '[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:



The screenshot shows the configuration page for the PayPal payment method in X-Cart. It includes a form with the following elements:

- A checkbox on the left.
- A text input field containing "PayPal".
- An "Extra charge" field with a value of "0.00" and a currency selector set to "\$".
- A large empty text area.
- An "HTTP" dropdown menu.
- A category dropdown menu with "All" selected, and "Premium" and "Wholesale" as options.
- A numeric input field with the value "999".
- Below the form, the text "Payment systems **PayPal**: Configure | Delete".
- A red warning message: "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.

### 11.5.3.3. 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.

## 11.5.4 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.

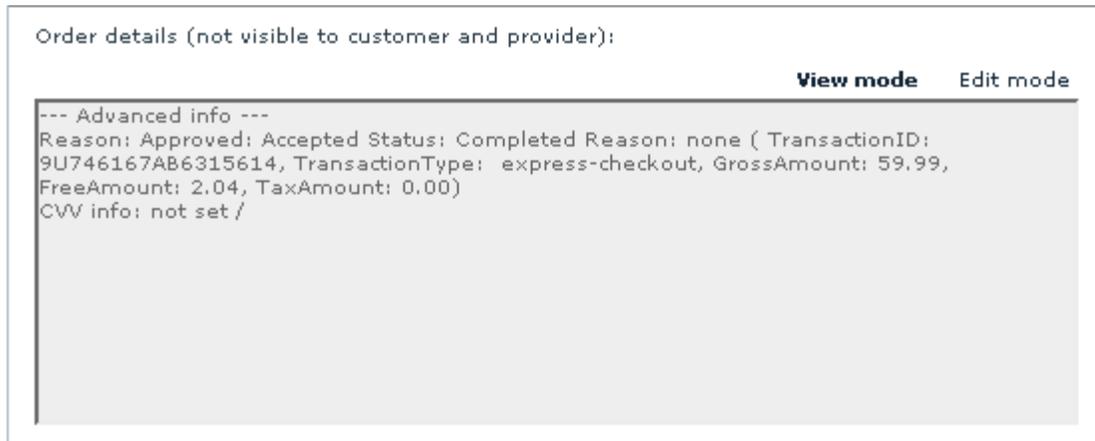
Detailed information is available on the 'Order details' page. Information about the payment transaction(s) pertaining to the order appears on the 'Order details' page as follows:

- '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.

## 11.6 WorldPay

WorldPay is the large internet payment service provider based in the UK that offers complete payment solutions for businesses of different size. Unlike many other online payment services, WorldPay delivers both payment gateway and merchant account services, so there is no need to go elsewhere to get everything you may need for your online business. WorldPay is a true international service that offers global and local payments services to businesses based in more than 50 countries worldwide, including Australia, Canada, the United States and the major European and Asiatic countries.

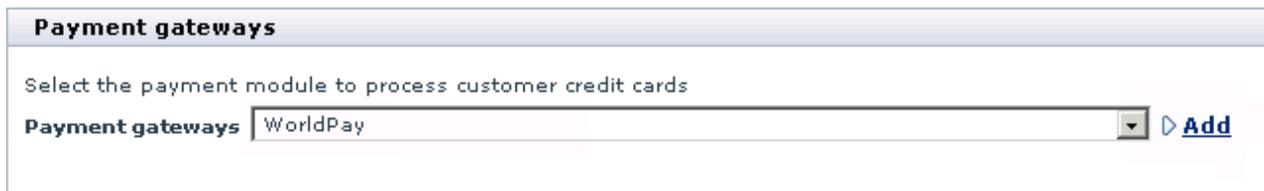
## 11.6.1 Obtaining a WorldPay Account

If you have not registered an account with WorldPay yet, you should do it before you start setting up WorldPay in X-Cart. To open an account, go to the WorldPay website at <https://secure.worldpay.com/app/application.pl> and follow the instructions on the screen. After you have registered an account, you can set up WorldPay in the X-Cart Admin area.

## 11.6.2 Setting up WorldPay

To use WorldPay 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 *WorldPay* 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**, WorldPay 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="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"/> <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="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"/>	<input type="text" value="HTTP"/>	<input type="text" value="All"/> <input type="text" value="Premium"/> <input type="text" value="Wholesale"/>	<input type="text" value="15"/>
<input type="checkbox"/>	<input type="text" value="WorldPay"/> <b>Extra charge:</b> <input type="text" value="0.00"/> \$	<input type="text"/>	<input type="text" value="HTTP"/>	<input type="text" value="All"/> <input type="text" value="Premium"/> <input type="text" value="Wholesale"/>	<input type="text" value="999"/>
Credit Card processor <b>WorldPay</b> : <a href="#">Configure</a>   <a href="#">Delete</a>  Warning! WorldPay 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 WorldPay.

### Settings

Return URL:	<input type="text" value="http://www.example.com/xcart/payment/cc_worldpay.php"/>
Instance ID:	<input type="text"/>
Currency:	<input type="text" value="Afghani"/>
Test/Live mode:	<input type="text" value="test:approved"/>
Automatically redirect back to the store:	<input type="text" value="Yes"/>
Order prefix:	<input type="text"/>

5. Adjust the configuration settings for WorldPay and click the **Update** button to apply the changes.

- Return URL: The URL to which WorldPay must land customers back to X-Cart after a payment has been processed.
- Instance ID: Enter the name of your merchant account with WorldPay.
- Currency: Choose the currency in which you wish to accept payments through WorldPay.
- Test/Live mode: Choose the mode in which the gateways must operate.

The "test:approved" mode means that you can submit test orders and perform test transaction, and all the transactions will always be approved by the WorldPay test environment. The "test:declined" mode means that you can submit test orders and perform test transaction, and all the transactions will always be declined by the WorldPay test environment. In both modes money will not be withdrawn from credit cards.

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.

- Automatically redirect back to the store: Choose Yes if your customers should be forced to return to your store automatically, or choose No if customers should be able to return to the store manually by clicking a special button on the side of WorldPay.
- Order prefix: Enter a prefix that will be automatically added to IDs of orders placed in your store and paid through WorldPay.

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 WorldPay as a payment option.

6. Return to the list of payment methods and activate WorldPay by selecting the check box next to the gateway's name.
7. Click the **Update** button.
8. Adjust the configuration setting in the WorldPay back-office.
  - a) Log in to your WorldPay account at <http://www.worldpay.com/support/admin/>.
  - b) Click on Configuration options link opposite your Installation ID.
  - c) Select the following check boxes: Callback enabled? and Use callback response?.
  - d) Set the Callback URL *http://www.example.com/xcart/payment/cc\_worldpay.php* replacing the *http://www.example.com/xcart/* part with the true URL of your X-Cart store.

After you have configured and activated the gateway, your customers will be able to choose WorldPay as a payment option.

The screenshot displays the checkout process in X-Cart. At the top, a navigation bar includes 'Your cart', 'Personal details', 'Shipping & Payment', and 'Place order'. The 'Shipping & Payment' section is highlighted. Below this, there are two main columns: 'Billing Address' and 'Payment method'. The 'Billing Address' column contains the text: 'PO BOX 1719', 'Chicago', 'Illinois', 'United States', '60608', and a 'Modify' link. The 'Payment method' column lists three options: 'WorldPay' (selected with a radio button), 'Money Order US Banks Only', and 'Gift Certificate'. A 'Continue' button is positioned at the bottom center of the form.

## 11.7 Sage Pay

Sage Pay is a 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. 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::SSLeay, 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, although it is common practice that you tell your customers which provider is going to process their payment in case customers 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::SSLeay, 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.

## 11.7.1 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.

## 11.7.2 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					
<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"/> 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="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"/> 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="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="Protx VSP Form"/> Extra charge: <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>Protx VSP Form</b> : <a href="#">Configure</a>   <a href="#">Delete</a> ⚠ Warning! Protx VSP 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 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.

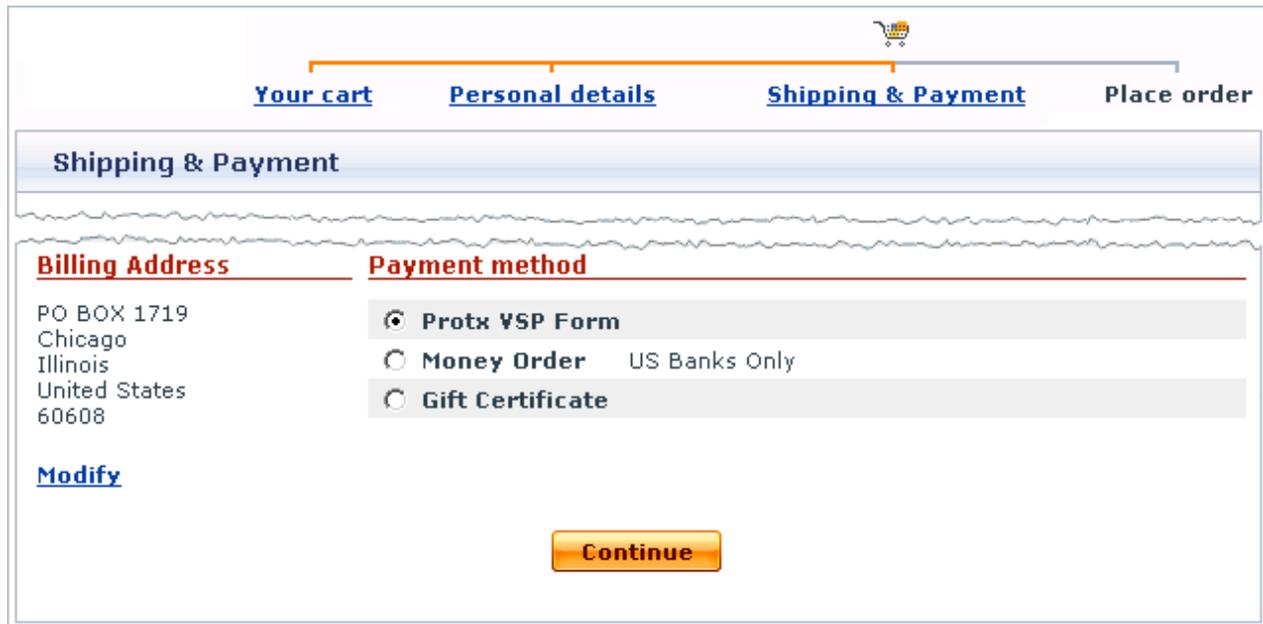
- Order prefix: Enter a prefix that will be automatically added to IDs of orders placed in your store and paid through Sage Pay Form.

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**

**Protx VSP Form**

**Money Order**   US Banks Only

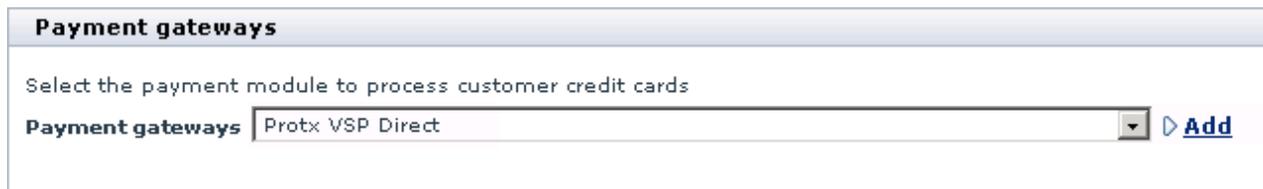
**Gift Certificate**

[Continue](#)

### 11.7.3 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** Protx VSP Direct [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"/> 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="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"/> 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="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="Protx VSP Direct"/> Extra charge: <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>Protx VSP Direct</b> : <a href="#">Configure</a>   <a href="#">Delete</a> ⚠ Warning! Protx VSP 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	<input checked="" type="radio"/> <b>Protx VSP Direct</b> <input type="radio"/> <b>Money Order</b> US Banks Only <input type="radio"/> <b>Gift Certificate</b>

[Modify](#)

[Continue](#)

# 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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