SMITH CONSULTING

SmithCart

Shopping Cart Software
v. 4.34

Users Manual

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I.   Introduction

Smith Cart is designed to help you build a robust online store in DotNetNuke. This software can satisfy both a professional user, interested in advanced functionality and a novice for whom simplicity is the main factor.

You will find the module very user friendly and easy to use. You just go to our site, buy the software, build your store and start selling. This manual will guide you step-by-step through installation, setup and use of the shopping cart software.

The Smith Cart module supports all major payment gateways and merchant account providers.   If you do not have a payment gateway or merchant account setup, please contact Smith Consulting at 949-829-3020 we are certified resellers for Authorize.Net, Chase PaymentTech, Wells Fargo and TransFirst.

Thank you for using the Smith Cart!

II.   What is Smith Cart

Smith Cart is powerful shopping cart software built for the DotNetNuke environment and programmed using industry standard ASP.Net, C# and SQL Server. Optimized programming code makes it possible to build stores that can easily handle 50,000 or more products. Smith Cart also uses your DNN portal skins and containers so you don't have to purchase or build new skins specifically for the cart.

Smith Cart is your best choice if you are:

- Looking for quality DNN shopping cart software to start an online business.
- A site owner wishing to integrate a shopping cart with your existing web site.
- A web developer searching for a professional low-cost DNN shopping cart
- An ISP or web hosting company that wants to offer a shopping cart solution as a part of your services.
- Looking for a good DNN shopping cart module to create a dynamic website with some specific functionality.

III. Smith Cart Modules

The following eight modules are included in Smith Cart:

Module Name	Module Description
Buy Now Module	The BuyNow module is the main cart module and includes the product listing, cart, checkout and store admin screens
Product Detail Module	The Product Detail module is the product detail page that displays the main product image, product variants, variant images, lightbox slideshow, image zoom and tab control with product descriptions, related products, etc.
Category Menu Module	The Category Menu module can be added to any pane and displays the categories and sub categories you have defined. It is used to filter the products by category or sub category.
Mini Cart Module	The Mini Cart module displays a summary of the items currently in the cart and allows user to remain on product catalog page while adding products to the cart.
My Account Module	Allows the user to login to the portal and view their order history
Featured Products Module	The Featured Products module displays products that have been flagged as featured in the product setup screen. Can be displayed alongside your product catalog to up sell or cross sell users.
Search Module	The Search module is a separate module in Smith Cart that can be placed in any pane on any page in your portal and allows the user to search and quickly locate products in your catalog.
Quick Order Entry Module	The Quick Order Entry module allows users who know what they want to quickly locate items and add them to the cart for checkout. The user can enter a SKU and quantity and verify the product description and then add to cart.
Affiliate Tracking Module	The Affiliate Tracking module is a specialized marketing module that allows you to track click thrus and referral purchases from your affiliates.

IV. Prerequisites

Type	Requirement
DNN Version	DNN 4.x.x – DNN 5.x.x
Database	MS SQL Server 2005/2008
Operating System	Windows 2000/2003/2008
.Net Framework	.Net Framework 2.0/3.0/3.5
Ajax	Ajax Toolkit 3.5 or greater
Environment	PayPal Website Payments Pro, PayPal PayFlow Pro and First Data Global Connect gateways require full trust

V. Installing Smith Cart

The Smith Cart module is delivered as a standard DNN installable zip or PA (Private Assembly). You install the Smith Cart just like you would install any other DNN module. Before installing any module it's a good idea to backup your DNN database and DNN installation folder. This is very important, as you can always roll back to previous status easily if installation goes wrong.

Step 1 - Log in to your DNN site using Host account. From the host menu you'll use Module Definitions to install the module. In order to do that, you should login as host, or an administrator account with module upload permissions.

Figure 1 - DNN Host Menu

You can reach Module Definitions from the Host menu item as show in figure 1 above. Install the new module from the Host -> Modules menu in DNN.

Step 2 - Install New Module
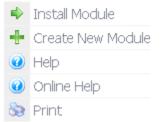
Figure 2 - Module Definitions screen

On Module Definitions screen (figure 2), choose Install New Module from the actions menu.   This action menu can be either left or right side of the main container. It depends on the layout of your current DotNetNuke skin.

Step 3 - Browse the ZIP File

Remember the place where you saved the module ZIP file you downloaded? Then browse it.

Figure 3 - Browse for the module

Step 4 - Pick the file

After you accessed the file, choose it and click Next.

Figure 4 - Pick your module

Step 5 - Add the File

The file (with complete physical location) appears in the textbox. Check it once again and then click Next.

Figure 5 – Install New Module

Step 6 – Install it Now!

When you see it appear on text area box, click Next and go through the DNN install module wizard.

Step 7 - Module Installed

If you do not see any error messages, it means that the module is installed correctly.

Click the Return link.

Step 8 – DNN Install New module log

When everything is OK, you should see the Smith Buy Now module on the Module list on upper panel. Now you can use the module.

Step 8 – Create a new page in your DNN portal and add the Smith Buy Now module to the page.

VI.   Buy Now Module

The Buy Now module is the main cart module and includes the product listing, cart, checkout and store admin screens.   Create a new page that you want as your store landing page and add the Buy Now module to the page.

A.   Configuring the Buy Now Module Settings

The first step after installing the module is to configure the module settings. To load the BuyNow module settings click on the "Cart Settings" button:

Cart Settings

Scroll to the bottom of the screen and click the plus sign next to the "Smith Buy Now Settings"

SmithCart Settings

Payment Gateway Setup

* Gateway:	Authorize.Net
* API Login:	2Sht9m67PD
* TransactionKey:	35J2rq5d6LtJ2Yg6
Test Mode:	☑

B.   Gateway Setup

Gateway – The Gateway dropdown list is where you select the gateway provider you are signed up for and wish to use with the Smith Cart module. The gateway is the server and software programs that the Smith Cart module sends credit card or eCheck (ACH) transaction to for processing. Select the gateway that applies to you. If you do not have a payment gateway setup please contact Smith Consulting at 949-829-3020. We are

certified resellers with Authorize.Net and other major gateway providers and can get you setup quickly. If you are not ready to sign up for a payment gateway and just want to test the cart you select the "Manual" payment gateway option.

C.   Gateways Supported

- ANZ eGate (Bank hosted payment page)
- Authorize.Net
  - o Authorize.Net (AIM)
  - o Authorize.Net Hosted Payment Page (SIM)
  - o Authorize.Net Recurring Billing (ARB)
- BluePay
- CardFlex
- DPS PaymentExpress (Bank hosted payment page)
- Elavon Internet Secure
- Elavon Virtual Merchant (Formally Nova)
- E-xact (e-xact.com) – Canadian Payment Gateway
- eWay (Australia - http://www.eway.com.au/)
- First Data Resources (FDR) - First Data Global Gateway Connect
- First Data Global Gateway Linkpoint (32 bit only)
- First Data Global Gateway Web Service (32 bit and 64 bit)
- Innovative (QuickBooks)
- Merchant e-Solutions
- MyGate (South Africa) - mygate.co.za
  - o MyGate Virtual (Bank hosted payment page)
  - o MyGate Enterprise with 3D-Secure
- PayPal
  - o PayPal Website Payments Standard
  - o PayPal Website Payments Pro
  - o PayPal Payflow Pro
- PayWay by WestPac - payway.com.au (Bank hosted payment page)
- NMI - Network Merchants, Inc.
- National Payment Provider (NPP)
- QuickBooks Merchant Services (QBMS)
- Realtors Electronic Commerce Network - realtor.org (Bank hosted payment page)
- Sage Payment Solutions
- Sage Pay (Bank hosted payment page)
- SkipJack
- TransFirst
- UGSPAY
- WorldPay (Bank hosted payment page)
- Custom Web Service

- Manual Processing (No Gateway) – If you choose this option the module stores the customer, order and credit card information in the database and you can process the credit card transaction at a later time manually through your credit card terminal or virtual terminal.

D.   Authorize.Net (AIM)

Smith Cart is integrated with Authorize.Net's Advanced Integration Method (AIM).

The following credentials are required by the Authorize.Net gateway:

API Login - This is a required field for the Authorize.net gateway. API Login is a unique id that identifies you with the gateway provider.

Transaction key - This is the gateway password and is a required field.

Please Note: Authorize.Net expires their test accounts after 30 days. You can apply for an Authorize.Net test account using the following link http://developer.authorize.net/testaccount/

E.   Authorize.Net (SIM)

Authorize.Net Server Integration Method (SIM) provides a customizable, secure hosted payment form to alleviate security requirements of SSL and PCI.

The following credentials are required by the Authorize.Net gateway:

API Login - This is a required field for the Authorize.net gateway. API Login is a unique id that identifies you with the gateway provider.

Transaction key - This is the gateway password and is a required field.

Receipt Link Text – Enter the text that you want to be displayed on the button on the Authorize.Net payment confirmation page. When the user clicks the button at Authorize.Net they will be returned to your DNN portal.

To obtain your API Login and Transaction Key login to your Authorize.Net virtual terminal as follows:

- Log Into Authorize.Net
- On the first page, look for the "Account" section at the bottom left hand side. Click on "Settings".
- On the settings page, click on "API Login ID and Transaction Key", which is located in the "Security Settings" section.
- Your API login Id should show on the API Login ID page, and to obtain a transaction Id, follow the instructions in the "Create New Transaction Key" section.

There are a number of settings that can be configured to make your Smith Registration Authorize.Net integration more seamless for you and for your users. By logging into your Authorize.Net account, you can control the look and feel of the Authorize.Net payment form, email your users a payment receipt after they successfully fill out the Authorize.Net payment form, and configure your Authorize.Net account to automatically send updates regarding the status of a form's payment.

1.   Configuring the Authorize.Net Return URL

1. On the first page, look for the "Account" section at the bottom left hand side. Click on "Settings".

2. Click on "Response/Receipt URLs", which is located in the "Transaction Format Settings" section.

3. Click on the "Add URL" link that is located in the Response/Receipt URL page.

4. You will then see a textbox where you can add your form's unique URL. Navigate to the confirm page of the Smith Registration (the page with the process payment button) and cut and paste the URL from your browser window to the Authorize.Net response URL field.

2.   Customize Authorize.Net Payment Form

Since your users will be redirected to a secure Authorize.Net payment form to fill in their billing information, you may want to customize the look and feel of the payment form to match your website to provide a seamless user experience. In order to customize the Authorize.Net payment form please do the following:

1. Log Into Authorize.Net - https://account.authorize.net/

2. On the first page, look for the "Account" section at the bottom left hand side. Click on "Settings".

3. On the settings page, the first section is labeled "Transaction Format Settings". In that section, click on "Payment Form".

4. In the payment form area, you can customize the header, footer, color settings, and the form fields that appear on the Authorize.Net payment form. To customize each area, just click on the appropriate link.

3. Send Your Users a Receipt

If you collect a user's email address when they complete the Authorize.net payment form, you can opt to send them receipt via email. To do this:

1. Navigate to the "Settings" section as described in the previous section.

2. Click on "Email Receipt" which is located in the "Transaction Format Settings" section.

3. Check "Email transaction receipt to customer (if email address is provided)"

4. Add any text that you would like to be sent to your users in the email receipt.

Note: If you want your users to receive an email confirmation receipt from Authorize.Net after they successfully pay through Authorize.net, you must collect their email address. To ask for an email address, customize the form fields to ask for "Email" in the "Customer Billing Information" section. Smith Cart automatically sends an email confirmation receipt so configuring Authorize.Net to send a receipt is not required.

4. Setting up recurring billing on the Authorize.Net Payment Form

To setup recurring billing on the Authorize.Net payment form you can configure a new field on the authorize.net payment form called Recurring Billing Transaction which indicates whether the transaction is a recurring billing transaction.

To configure additional fields that you would like to appear on your payment form follow these steps:

1. Log into the Merchant Interface at https://secure.authorize.net
2. Click Settings under Account in the main menu on the left
3. Click Payment Form in the Transaction Format Settings section
4. Click Form Fields
5. Click to select the checkbox(s) in the View column next to the fields you would like to display on your payment form
6. For each field you are adding, click to select the check boxes in the Edit and Required columns if you would also like to configure either or both of these attributes for the field
    a. View – The customer can view but not edit the information. For example, if you would like to display an invoice number. Information that is View only should be submitted with the transaction information to the payment gateway. Contact your Web developer for more information.
    b. Edit – The customer can view and/or edit the information but the field is not required to submit the transaction. For example, if you would like to collect but not require the customer's email address, configuring the field as View and Edit allows the customer to provide this information with the transaction.
    c. Required – The customer must provide the information in order to submit the transaction. For example, if you would like to require the customer's card code. When requiring this field, the View, Edit and Required attributes must be configured.

7. Click Submit

Be sure to test your payment form anytime you update fields and their attributes to be sure that it meets your requirements.

See the following url at Authorize.Net for more info on configuring your payment form

http://www.authorize.net/support/merchant/

Navigate to section Form Settings and Customizing the Hosted Payment Form.

5.   Authorize.Net Payment Pages

In Smith Cart you add items to your cart and checkout. When you are on the final cart checkout screen (Confirm page) and you click the "Submit" button you will transferred over to the Authorize.Net payment page to enter your credit card number and billing information.

The following are screen shots of the Authorize.Net payment pages:

Authorize.Net Payment Page:

Authorize.Net Confirmation/Receipt Page:

6.   Authorize.Net Errors

The following are a couple common errors that you may run into if you haven't configured your Authorize.Net (SIM) account and payment pages correctly:

(13) The merchant login ID or password is invalid or the account is inactive. - This error occurs when either your login Id or transaction key are invalid. Please refer to the section on Configuring Authorize.net above and make sure that you have obtained the proper login Id and transaction key.

(14) The referrer, relay response or receipt link URL is invalid. - This error occurs when you have not entered a response/relay URL into Authorize.net, or the response/relay URL

F.   PayPal Website Payments Standard

If you use PayPal Website Payments Standard, when your customer checks out they will be directed to a page that allows them to log into their PayPal account or pay by credit card without having to sign up for a PayPal account.

Before you can use PayPal Website Payments Standard you need to sign up for a PayPal account.

Create a PayPal personal or business account at PayPal. We recommend you create a business account in order to keep your personal and business PayPal accounts separate. Opening a business account is preferable because it allows you to use a business name on the PayPal checkout pages and in theory allows you to keep your private name separate. Presenting a business name to customers will help build customer confidence. Additionally, a PayPal business account will allow you to configure a return URL which is required for proper configuration in the Smith Cart.

Go through the approval process to verify your account. This will require a bank account and correct contact information. You can contact PayPal customer service if you have questions here.

Configuring the return URL at PayPal

1. Go to the PayPal website and login to your personal or business account.
2. Select Profile menu (Click on Profile link)
3. Under Selling preferences, select website Payment Preferences

The following the screen will be displayed:

Figure 6

4. Click the "Auto Return" radio button to "On"
5. Enter the "Return URL" of your website home page. See Figure 7 above.

Configuring Smith Cart Module Settings for Paypal Website Payments Standard

Gateway – Choose "PayPal Website Payments Standard" from the dropdown box under the "Gateway Setup" section in your Smith Cart module settings.

Merchant (Required) – Enter your PayPal email address you created when you signed up with PayPal.

Merchant Logo URL (Optional) – Enter the path to your company logo. Your company logo will show up on the PayPal checkout screen as the user checks out on PayPal.

G.   PayPal Website Payments Pro

PayPal Website Payments Pro combines internet merchant account and payment gateway functionality into one.   Note: PayPal Website Payments Pro uses a dll from PayPal that requires a full trust environment.

Obtaining API Credentials

To use the PayPal API, you must have API credentials that identify you as a PayPal business account holder authorized to perform various API operations.

Although you can use either an API signature or a certificate for credentials, PayPal recommends you use a signature.

Creating an API Signature

You must establish credentials to use the PayPal API; typically, you create an API signature.

You must have a PayPal business account.

An API signature is a credential that consists of an API User Name along with an associated password and signature, all of which are assigned by PayPal.

To create an API signature

1. Log into PayPal and click Profile.

2. Click API Access from the Profile menu.

Profile Summary

To edit your Profile information, ple
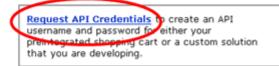
Account Information

Email
Street Address
Phones and Mobile Payments
Password
Notifications
Language Preference
Time Zone
API Access
PayPal Security Key
Business Information
Close Account

3. Click Request API Credentials.

Setting up PayPal API Credentials and Permissions

Select one of the following options to use PayPal's secure Application Programming Interfaces (APIs). If you're not sure what you need, ask your shopping cart or solution provider.

Grant API Permission to your shopping cart or solution provider if the cart will make API calls on your behalf.

Request API Credentials to create an API username and password for either your preintegrated shopping cart or a custom solution that you are developing.

Learn more about PayPal API concepts and terminology

4. Check Request API signature and click Agree and Submit.

5. To complete the process, click Done.

Make a note of the API User Name, the Password, and the API Signature. You will need to enter this information under the Gateway setup in the module settings of the cart.

H.   PayPal Payflow Pro

Smith Cart contains fully-integrated support for the PayPal PayFlow Pro (formerly VeriSign) payment service. Payflow Pro is a payment gateway solution that can be used with any Internet Merchant Account to process credit card transactions online.

Note: If you are using Payflow Pro with PayPal as your Internet Merchant Account to process credit card transactions you should use PayPal Website Payments Pro. See section D above for a description of PayPal Website Payments Pro.

1. Obtain a PayPal PayFlow Pro Account. In order to use PayPal PayFlow Pro, you must have a PayFlow Pro account and a compatible internet merchant account.   If you don't already have a merchant account, you can obtain both a merchant account and a PayFlow Pro account through Smith Consulting by calling 949-829-3020.

To sign up for a PayFlow Pro account:

   a. Go to https://manager.paypal.com/ and click the **I would like to create a new account** link near the bottom of the page.
   b. Provide the required information. They will ask you for information about your business, primary contact, billing contact, and merchant bank and processor. You may want to have this information ready before you begin the sign-up process.

2. To configure Smith Cart to use your PayPal PayFlow Pro account to process payments in real-time, complete the following steps:
   a. In Smith Cart, Select the payment gateway option from the dropdown labeled PayPal Payflow Pro
   b. Merchant Login - Enter your PayFlow Pro Merchant Login. If you don't know your Merchant Login, contact your PayFlow Pro account representative.
   c. User - Enter the user name you use to log in to your PayFlow Pro account.
   d. Partner - Enter your PayFlow Pro Partner ID. If you don't know your Partner ID, contact your PayFlow Pro account representative.
   e. Password - Enter the password for your PayFlow Pro account.

I. **QuickBooks Merchant Services (QBMS)**

When you choose QuickBooks Merchant Services as your gateway option from the
gateway dropdown the following three required fields are displayed:
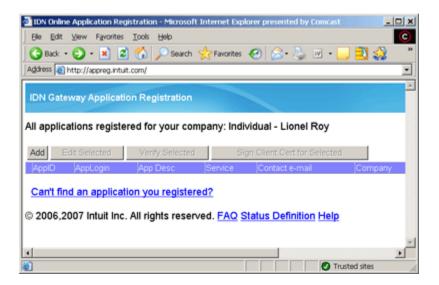
- App ID
- App Login
- Connection Ticket

Follow these steps to obtain your AppID and AppLogin

1. Navigate to http://appreg.intuit.com

2. Click Join Now, then fill in the form to register and you will be emailed your access
info.

3. Navigate to http://appreg.intuit.com and login using your login and password obtained
in the previous step.

4. Click on "Add"

5. Enter a domain name and App name.
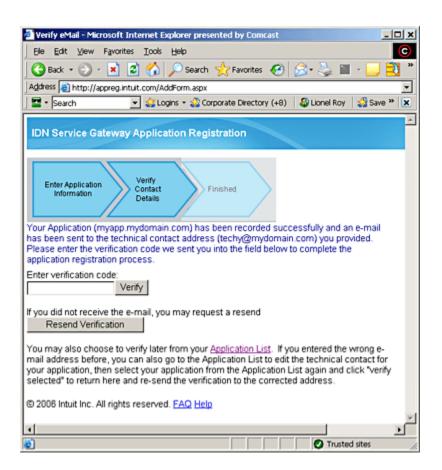
These are used to create your login. Also enter a description of your application and an email address for a technical contact. This should be a real email address as you will need to access it later.

- Leave QBMS checked.
- If you are setting up your live application select "Production"
- If you are setting up your test application select IDNBeta (ptc)
- Leave desktop checked.

The completed screen should look like this:

6. Hit Save. The following screen will be displayed:

7. Please check the technical contact email address for an email from support@intuitdevelopernetwork.com for a verification code to enter here.

8. Copy the verification code to this screen, and hit 'Verify', and you will receive the following confirmation screen:

9. Hit 'Finish' and you will be redirected to the same screen as when you first logged in. Now it will have the details of the application you just registered.

10. Please make a note of the AppID and AppLogin as you will need them later when setting up the gateway in Smith Cart.

Follow these steps to obtain your Connection Ticket

1. Add the AppID to the placeholder in this URL:

Test URL:

https://merchantaccount.ptc.quickbooks.com/j/sdkconnection?appid=<Appid>&sessionEnabled=true

Live URL:

https://merchantaccount.quickbooks.com/j/sdkconnection?appid=<Appid>&sessionEnabled=true

(For example, if the AppID is 123456789, the URL would be,
https://merchantaccount.ptc.quickbooks.com/j/sdkconnection?appid=**123456789**&session
Enabled=true)

Launch your browser to navigate to the login page,and enter your account login and
password.
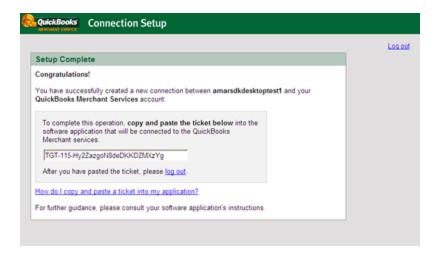
2. Once you log click the "Create Connection" Button

You will then be asked to Turn on or off Login Security, you **can not** turn it on, if you do
Smith Cart will not be able to process the transactions.

When you click "Continue" you will be warned about the security issues talked about above,
click "OK" to get the ticket

3. The final screen displays your connection ticket. You will need to copy this and store
it in a secure place. It will need to be pasted into your application sign-on request

Return to the Smith Cart module

1. Navigate to the BuyNow module settings under the gateway setup section
2. Select "QuickBooks Merchant Services" from the gateway dropdown
3. Enter your App ID, App Login and Connection as follows:

Scroll to the bottom of the page and click "Update" to save you settings.

J.   Innovative (QuickBooks)

UserName - This is a required field for the gateway. UserName is a unique id that identifies you with the gateway provider.

Password - This is the gateway password assigned to you by Innovative and is a required field.
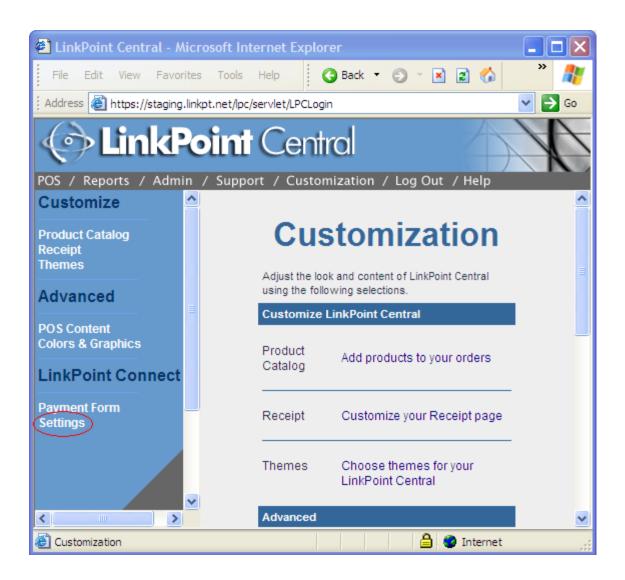
Innovative Test Account
Userid: GatewayTest
Password: GateTest2002

K.   First Data Global Gateway Connect -Linkpoint

1. Login to First Data Global Gateway central

2. Click Support

3. Click Download Center in the left hand navigation

4. Click download next to Store PEM File

5. Follow the instructions, and download your PEM file to your local PC.

6. In Smith Cart, Select the payment gateway option from the dropdown labeled First Data Global Gateway.

7. Enter your First Data Global Gateway storename in the Store Name field.

8. In Smith Cart, use the browse button next to the field labeled Pem File to upload and save this certificate to a file on your web server with a .pem extension.

Note: The First Data Global Gateway requires a "pem" file to be uploaded to the server. The pem file is a special file that contains a certificate that is used to authenticate your shopping with the gateway. It is used for security purposes to prevent other people from using your gateway account.

9. Go to First Data Global Gateway central, and login. Information for this should have been sent to you from First Data Global Gateway.

10. Click Customization in the top menu.

11. Mouse over the Administration menu link, and click the option labeled Connect Settings.

12. In the Order Submission Form section, enter the secure path to your cart page in the Submission Form URL field. This is the same URL you see when you are checking out in your store on the last page of the checkout. The correct page will have the "Submit Order" button on it.

For example:
https://www.example.com/Store/tabid/38/ctl/Confirm/mid/383/Default.aspx

Please note: If this URL does not match the exact URL that the customer is at when they submit the order to First Data Global Gateway , you will get the error:
- It is not possible to order from the store at this time.
- Contact the merchant for further information (error 1002).

Please note: First Data Global Gateway requires port 1129 be opened for both inbound and outbound traffic. If you are running on a shared host they may not allow this port to be opened. Most dedicated hosts will support the opening of port 1129. Please check with your hosting provider for details.

First Data Global Gateway Connect Linkpoint requires the linkpoint.dll to be installed on your server. When you install Smith Cart the linkpoint.dll is automatically installed in the \bin folder off the root of your DNN install. The linkpoint dll is 32 bit only and will not work on 64 bit servers. If you have a 64 bit server you should use the First Data Global Gateway Connect web service gateway option.

L.   First Data Global Gateway Connect Web Service

First Data Global Gateway Connect web service is a brand new gateway integration option from First Data that is a soap xml web service and will work on both 32 bit and 64 bit servers.

When you select the First Data Global Gateway Connect web service from the gateway dropdown in the Smith Cart settings you will see the following two fields displayed:

User ID - This is a required field for the gateway. User D is a unique id that identifies you with the gateway provider.

Password - This is the payment gateway password and is a required field.

In order to use the First Data Global Gateway Connect web service you will need to install a certificate on your IIS web server. For more information on installing the First Data certificate on your web server see section 15 page 61 of the First Data Global Gateway Connect web service integration guide.

M.   RBS WorldPay

RBS WorldPay (http://www.worldpay.us/) payment gateway integration is a Bank Hosted integration meaning the user is re-directed to a secure page hosted by WorldPay to submit their card details then returned to your site and the cart where a confirmation page is displayed.

To setup the cart to use WorldPay as the payment gateway do the following:

1. Go to the BuyNow module settings "Payment Gateway Setup" section and select "RBS WorldPay" as the payment gateway.

2. You will be prompted to enter the following field:

instId - This is a required field for the gateway. instId is your RBS WorldPay Installation ID assigned to you when you sign up for the WorldPay gateway account.

In order to have worldpay return to your site the following 3 settings on the worldpay merchant interface that need to be set:
1. Click on this link to go to the merchant interhace http://www.rbsworldpay.com/support/index.php?page=login&c=WW
2. Select "Business Gateway – Formerly WorldPay" and click go
3. Select test or production whichever one you are trying to setup
4. Login using your credentials
5. Click "Installations" on the left panel
6. Click the button under the "Integrations Setup" column for the account you want to setup
7. In the field titled "Payment Response URL" cut and paste the url from the shopping cart confirm page. The confirm page is the cart page with the process payment button, the page right before you go to WorldPay
8. Check the box titled "Payment Response enabled"
9. Check the box titled "Enable the Shopper Response"
10. Save your changes

N.   ANZ eGate Payment Gateway

The ANZ eGate (anz.com) payment gateway integration is a Bank Hosted integration meaning the user is re-directed to a secure page hosted by ANZ eGate to submit their card details then returned to your site and the cart where a confirmation page is displayed.

Merchant ID - This is a required field for the gateway. MerchantID is a unique id that identifies you with the gateway provider.

Access Code - This is the gateway Access Code and is a required field. ANZ assigns an Access Code to you when you sign up for their gateway services.

Secure Hash Secret - This is the gateway Secure Hash Secret key and is a required field. ANZ assigns an Secure Hash Secret key to you when you sign up for their gateway services.

O.   MyGate Payment Gateway

MyGate is a payment gateway based in South Africa http://mygate.co.za/ providing ecommerce credit card services.

MerchantID - This is a required field for the gateway. MerchantID is a unique id that identifies you with the gateway provider.

ApplicationID - This is the gateway ApplicationID and is a required field. MyGate assigns an ApplicationID to you when you sign up for their gateway services.

P.   MyGate Enterprise Payment Gateway

MyGate Enterprise is a payment gateway based in South Africa http://mygate.co.za/ providing ecommerce credit card services. The MyEnterprise solution is MyGate's payment solution for companies that want to incorporate their online transactions into their internal billing system or online website. It also allows the merchant to accept the clients credit card details on their website as opposed to utilizing the MyGate Virtual Payment Screen with the MyVirtual Solution. This Solution makes use of web services to communicate with MyGate and to submit the data securely.

Merchant ID - This is a required field for the gateway. Merchant ID is a unique id that identifies you with the gateway provider.

Application ID - This is the gateway Application ID and is a required field. MyGate assigns an Application ID to you when you sign up for their gateway services.

Gateway ID - This is the Gateway ID that corresponds to bank where the Merchant Account is kept.

    21 = FNBLive
    22 = ABSA
    23 = Nedbank

Bank ID - This is the Bank ID and is a required field. MyGate assigns a Bank ID to you when you sign up for their gateway services.

The MyGate Enterprises gateway integration will process both 3DSecure and non 3DSecure credit card transactions.

Q.   DPS Payment Express Hosted Payment Page

Payment Express is a Visa and MasterCard certified solution, developed by DPS, which facilitates electronic payments seamlessly from multiple access points i.e. Web, EFTPOS, Billing, IVR (Interactive Voice Response), CRM, Vending, MOTO (Mail Order / Telephone Order) and Wireless. http://www.paymentexpress.com

The DPS Payment Express is a bank\\ hosted payment page that is compliant with PCI DSS standards.

DPS is certified with banks in Australia, New Zealand, Pacific Islands, Singapore, South Africa, USA and United Kingdom.

Select DPS – Payment Express from the "Gateway" dropdown list and the following fields will be displayed:

PxPayUserId - This is a required field for the payment gateway. PxPayUserId is a unique id that identifies you with the gateway provider.

PxPayKey - This is the payment gateway secure key and is a required field.

With the DPS hosted payment page credit card information is not collected in Smith Cart, all payment information is collected on the DPS hosted payment page. From the Smith Cart confirmation page when you click submit order the following DPS payment page will be displayed:

Payment Checkout	
Amount (NZD)	$75.14
Credit Card Number	4111111111111111
Card Expiry Date	12 / 11
Name on Card	Dave Smith
Card Security Code	123 What is this?

SUBMIT ▶

dps|paymentexpress®

Privacy Policy

Payment Complete	
Response	APPROVED
	The Transaction was approved
Description	PAYMENT - 5/12/2010 10:13:07 PM
Transaction Type	Purchase
Amount (NZD)	$75.14
Card Type	Visa
Authorization Code	171655

NEXT ▶

dps|paymentexpress®

Privacy Policy

When the user clicks the "Next" button they will be returned to the Smith Cart confirmation page.

The payment pages at DPS are fully customizable. For information on how to customize the look of your payments page please see:

http://www.paymentexpress.com/technical_resources/ecommerce_hosted/pxaccesscustom.html

R.   Elavon Virtual Merchant

Elavon (http://www.elavon.com/) is a leading global provider of merchant acquiring services, providing integrated payment processing to more than 1 million merchants. Elavon merchant services formerly Nova is available through Costco and other merchant service providers.

Select Elavon Virtual Merchant from the "Gateway" dropdown list and the following fields will be displayed:

Merchant ID - This is a required field for the payment gateway. Merchant ID is a unique id that identifies you with the gateway provider.

User ID - This is the payment gateway user id and is a required field.

Pin - This is the payment gateway secure key and is a required field.

S.   Elavon Internet Secure

InternetSecure (http://www.internetsecure.com) is a complete solution for payment processing including Visa, MasterCard, American Express, Discover and INTERAC® Online Payments. InternetSecure is part of the Elavon suite of products. The Elavon network is one of the largest most reliable payment processing networks in the world processing more than a billion transactions annually.

Select Elavon Internet Secure from the "Gateway" dropdown list and the following fields will be displayed:

Gateway ID - This is a required field for the payment gateway. Gateway ID is a unique id that identifies you with the gateway provider.

T.   eWAY Payment Gateway

eWAY is a payment gateway based in Australia http://www.eway.com.au/ providing ecommerce credit card services. Smith Cart is integrated with the eWAY Merchant

Hosted Payment solution. Smith Cart posts an XML document containing customer and payment information to the eWAY payment gateway. This allows customers' to remain on your website at all times, while processing occurs behind the scenes.

In the Smith Cart BuyNow module settings enter the following information under the "Gateway" section for eWay:

CustomerID - This is a required field for the eWAY gateway. CustomerID is a unique id that identifies you with the eWAY gateway provider.

U.   NMI - National Merchants Inc

Merchant ID - This is a required field for the gateway. Merchant ID is a unique id that identifies you with the gateway provider. NMI refers to this as a userid.

RegKey - This is the gateway password and is a required field. NMI refers to this as password.

NMI URL – Enter the URL of the gateway. NMI hosts many private label gateways, therefore you must enter the URL for the gateway.

For example:
https://secure.cardflexonline.com/api/transact.php

NMI Test Account
Userid: demo
Password: Password

V.   PayWay – Bank Hosted

PayWay Net is an Australian based payment gateway provided by Westpac. You can learn more about PayWay here: http://www.payway.com.au. The PayWay payment gateway integration is a Bank Hosted integration meaning the user is re-directed to a secure page hosted by PayWay to submit their card details then returned to your site and the cart where a confirmation page is displayed.

Setup Instructions:

1. Login to your PayWay control panel using the information provided by PayWay:
https://www.payway.com.au/

2. Click the Setup Net link on the left side of the page

3. Click the Setup link

4. Select the third option on the page which reads Bill Payments/Shopping Cart - I need to pass across information from my website

5. Click Next

This page gives you an option to change the appearance of your PayWay hosted payment page. While you are free to do so, Smith Cart does not require you alter these settings. Click Next to go to the next settings page.

Under the heading Browser Return:

a. Set the Browser Return URL Pre Payment field to your storefront page URL:

https://www.example.com/Store/tabid/38/ctl/Confirm/mid/383/Default.aspx

b. Set the Browser Return Type field to Redirect

c. Set the Browser Return URL field to the same URL you entered for a. above

d. Set the Browser Return Payment Status field to all

6. Under the heading Server-to-Server Payment Notification

a. Set the Notification URL field to the same URL you entered for step 5a above.

b. Set the Notification Payment Status field to approved

c. Set the Notification Post Type field to extended

7. Click Next

8. You should now be on a settings page titled Security Information. Very carefully write down (or copy and paste to a text file) your Encryption Key, Username, and Password.

9. Enter your web server's IP address in the IP address section. If you don't have it, ask your web host.

10. Click Next through all remaining settings pages

11. To go live, click the go live link under Setup Net on the left side of the page

12. Click the Administration link on the left side of the page

13. Click Merchants

14. Your Merchant ID is located in the Merchant ID column. Write it down.

15. Look in the upper right hand corner of the page. You should see your Biller Code after the text Biller Code: Write it down.

16. Go to the Smith Cart BuyNow module settings under the Payment Gateway Setup section and select "PayWay – Bank Hosted"

17. Enter the following information in the textboxes:

    1. User Name
    2. Password
    3. Biller Code
    4. Merchant ID – Enter "TEST" for test mode
    5. Encryption Key

 Click "Update" at the bottom of the screen to save your changes.

Testing:
PayWay allows you to submit test transactions by setting your Merchant ID to TEST.

When testing, use the following Visa credentials:

Card #: 4564710000000004
Card Security Code: 847
Exp. Date: 02/19

PayWay should approve test transactions when you use the card data above.

W.   Sage Payment Solutions

Smith Cart is integrated and compatible with the Sage Gateway. Sage Payment Solutions is a division of Sage Software, for additional information about the Sage Payment Gateway, please visit www.sagepayments.com. When the "Sage Payment Solutions" gateway option is selected in the BuyNow settings the following required fields are displayed:

MerchantID - 12 Digit Merchant Identification (Virtual Terminal ID) Number Required for Gateway Access

Merchant Key - 12 Digit Merchant Key Required for Gateway Access

X.   Sage Pay Solutions

Smith Cart is integrated and compatible with the Sage Pay Gateway bank hosted payment form. With the Sage Pay bank hosted payment page users are transferred to the Secure Sage Pay payment for during the cart checkout. Sage Payment Solutions is a division of Sage Software, for additional information about the Sage Payment Gateway, please visit www.sagepay.com. When the "Sage Pay – Bank Hosted Payment Page" gateway option is selected in the BuyNow settings the following required fields are displayed:

Vendor Name – Vendor Name is required for gateway access and is assigned by Sage Pay after you sign up for a merchant account.

Encryption Key- The Encryption key is required for gateway access and is assigned by SageP ay after you sign up for a merchant account.

Y.   TransFirst

When the "TransFirst" gateway option is selected in the BuyNow settings the following required fields are displayed:

Merchant ID - This is a required field for the gateway. Merchant ID is a unique id that identifies you with the gateway provider.

RegKey - This is the gateway password and is a required field. Authorize.net refers to this as a Transaction Key.

Z.   Custom Payment Gateway Web Service

The Custom Payment Gateway Web Service option allows you to plug-in any payment gateway provider you desire. When the "Custom Web Service" gateway option is selected in the BuyNow module settings the following required fields are displayed:

Merchant ID - This is a required field for the gateway. Merchant ID is a unique id that identifies you with the gateway provider.

Password - This is the gateway password and is a required field.

URL – Enter the URL of the payment gateway you want to post the credit card transaction to.

For example: https://secure.myservice.com/processcard.aspx

The custom web service gateway option performs an https post operation to the URL you enter in the "URL" field. A secure SSL connection is initiated from the cart to the payment gateway URL to pass transaction data in name/value pairs. It is a standard https post "Request – Response" with hidden name value pairs (NVP). The following are the required fields (parameters) in the request and response between the cart and the payment gateway:

Parameters Posted by SmithCart to the Payment Gateway

- MerchantID
- Password
- Mode = "TEST" or "LIVE"
- Trans_Type = "SALE"
- Credit_Card_Number
- Expiration_Date
- CVV2_Code
- Amount
- Billing_Name
- Address
- City
- State
- Zip

- Country

Response Parameters SmithCart expects back from the Payment Gateway

- AuthCode
- Status
- TransID
- Notes
- Amount

The cart expects the transaction response parameters from the payment gateway to be returned as an ampersand ("&") delimited string. The gateway response parameters provide information about the status of a transaction whether it was accepted or declined as well as other information about the transaction.

The cart receives and parses the transaction response from the payment gateway and displays the results to the customer.

The custom gateway/web service option in the cart uses the standard WebRequest Class http://msdn.microsoft.com/en-us/library/system.net.webrequest.aspx in dot net to communicate with your payment gateway. The integration and communication between the cart and the payment gateway is very similar to the Authorize.Net AIM payment gateway integration here http://www.authorize.net/support/AIM_guide.pdf

AA.   Show PayPal Checkout Option

The show PayPal checkout option allows you to give your customers the option to checkout using PayPal standard in addition to the gateway option that you configured above under gateway settings. If you have configured PayPal standard under the gateway settings above you should NOT check the show PayPal checkout option checkbox. If you have configured PayPal Websites Payments Pro or PayPal Payflow Pro under the gateway settings above you should ONLY check this box if you want to give your customer the additional option at checkout to pay using PayPal standard.

Smith Cart Settings

When "Show PayPal Checkout Option" is checked two additional fields called "Merchant" and "Merchant Logo URL" will be displayed. See the following screen shot:

Merchant (Required) – Enter your PayPal email address you created when you signed up with PayPal.

Merchant Logo URL (Optional) – Enter the path to your company logo. Your company logo will show up on the PayPal checkout screen as the user checks out on PayPal.

User Checkout

When "Show PayPal Checkout Option" is checked the user is presented with the option to pay on your website using the payment gateway you configured from the gateway dropdown or checking out on the PayPal website using PayPal Website Payments Standard.

See the following screen of the cart checkout for an example:

When the user clicks the PayPal radio button the cart hides the credit card fields because the user will be entering their credit card information on the PayPal site.

When the user clicks the "Next" button they will be taken to a confirmation page.

Welcome   Shipping   Payment Method   **Confirmation**

Shipping Information
Kevin Carlson 20 Kendall Laguna Niguel CA 92677 United States Telephone: 5555555555 Shipping Method: Free

Billing Information
Kevin Carlson 20 Kendall Laguna Niguel CA 92677 United States Payment Type: PayPal Checkout

Order Details:

ProductName	Quantity	UnitPrice
VeriFone Vx 570	1	$399.00

Sub Total : $399.00
Shipping Fee : $0.00
Sales Tax 6.76% : $26.97
Total : $425.97

BACK   Check out with PayPal

When the user clicks the "PayPal Checkout" button they are transferred to the PayPal website to complete their payment:

BB. Store Location and Currency Setup

The store location and currency settings control the home country, state/region and currency the cart uses as default values in the cart checkout and backend admin screens. The country and state/region settings control the default value for the country and state/region dropdown boxes on the front end checkout screens step1 and step 2. The store currency dropdown allows you to set the currency symbol in the cart checkout and backend admin screens.

Additionally, the cart uses these settings for to set the proper local and currency for the payment gateway, tax setup and shipping configuration.

Select your home country, state/region and currency you would like the cart to use as default settings in your online storefront. Typically, these are set to the country and state/region you are physically located.

Store Country (Required) – Select the country that you operate your business from. The country dropdowns in the cart checkout will default to the country you choose here.

Store State/Region (Required) – Select the state/region that you operate your business from. Depending on which tax option you select in the tax setup section only customers in your home state/region and country will be charged tax.

Store Postal Code (Required) – Enter the postal code where you will be shipping product from. This is used in calculating shipping rates in the cart and is a required field.

Store Currency (Required) – Select the currency symbol that you want to display in the cart. The cart is programmed to dynamically generate the currency symbol using the dot net built in localization functions and will support any currency in the world.

Steps to add a currency symbol not in the list

1. Open up settings.ascx located in your \desktopmodules\smith.buynow folder

2. Locate the "ddlStoreCurrency" dropdown list control

3. Add the following list option making sure that you replace the listitem value and text property with the currency applicable to the country you are adding. See highlights below:
```
<asp:ListItem Value="en-za" Text="South Africa Rand - R" />
```

4. Save your changes

<u>**Google Analytics**</u>

SmithCart is integrated the cart with Google Ecommerce Analytics to track purchases. Each user's transaction information is sent from the cart to the Google Analytics database as it occurs. This provides the ability to track a specific referral source to a conversion or purchase in the cart.

Google Analytics ID - The unique id for your Google Analytics account also referred to as the web property ID or UA number.

CC. Payment Method Setup

The payment method setup section defines which payment methods are available to the customer in Step 2 of the cart checkout.   The following is a screen shot of the payment method options available:

❷ Payment Method Setup:
* *(Check at least one payment method)*

❷ Credit Card:	☑
❷ eCheck/ACH Checking:	☐
❷ eCheck/ACH Savings:	☐
❷ Purchase Order:	☑
❷ Purchase Order Role:	All Roles ▾
❷ Cash:	☐
❷ Cash On Delivery (COD):	☐
❷ Check w/Account Info:	☐
❷ Check w/No Account Info:	☐
❷ Internet Banking:	☐
❷ Telephone:	☐
❷ Show Bill Me Later:	☐
❷ Authorize Only:	☐

Credit Card – Check this box if you want to offer users the ability to checkout and pay for your products using credit cards. Supported credit cards are Visa, MasterCard, American Express, Discover, Diners and JCB. This is a required field.

eCheck Checking - Check this box if you want to offer users the ability to checkout and pay for your products using eCheck. eCheck is only supported with Authorize.Net and TransFirst payment gateways.

eCheck Savings - Check this box if you want to offer users the ability to checkout and pay for your products using eCheck. eCheck is only supported with Authorize.Net and TransFirst payment gateways.

Purchase Order - Check this box if you want to offer users the ability to checkout using a Purchase Order (PO). This is typically used when a customer is on payment terms or has an account with your company. When you check the Purchase Order option the following "Purchase Order Role" dropdown list will display all the roles defined in your portal and allows you to select the role that the PO payment method will apply to:

If you select "All Roles" the Purchase Order payment method will always be displayed to the user. If you select one of the roles in the dropdown list then the Purchase Order payment method will only be available to users who are logged in and a member of the role you selected.

On the Step 2 checkout screen, when the user chooses the option to pay using a PO they will be required to enter their PO number before continuing the checkout and will be allowed to complete the checkout without a real time credit card authorization and the PO number they entered will be saved to the database.

Cash - Check this box if you want to offer users the ability to checkout using Cash.

Cash on Delivery (COD) - Check this box if you want to offer users the ability to checkout using Cash on Delivery (COD). This is typically used when a customer is picking up their goods at the store via will call or if the product is delivered to the customer the shipping carrier receives payment before handing over the goods. When the user chooses the option to pay using a COD they are not required to enter any account information only their billing name and address. The user will then be allowed to complete the checkout without a real time credit card authorization.

Check w/Account Info - Check this box if you want to offer users the ability to pay using traditional paper check. When "Check with Account Info" is selected the following 2 new fields will display on the Step 2 checkout page:

- Payer name
- Account Number

- Routing Number

The user will then be allowed to complete the checkout without a real time credit card or eCheck authorization.

Check w/No Account Info - Check this box if you want to offer users the ability to pay using traditional paper check. When the user chooses the option to pay using a check they are not required to enter any account information only their billing name and address. The user will then be allowed to complete the checkout without a real time credit card authorization.

Internet Banking - Check this box if you want to offer users the ability to pay by providing internet banking information. When the "Internet Banking" payment method is checked the following two fields will display in the settings:

- Merchant Bank Name
- Merchant Bank Account Number

When the payment method "Internet Banking" is enabled, on the checkout Step 2 page the user can select "Internet Banking" as payment method from the dropdown list and the following two read only labels will display on the Step 2 checkout page:

- Merchant Bank Name
- Merchant Bank Account Number

The user will then be allowed to complete the checkout without a real time credit card authorization.

Adding the Bank Information to the Confirmation Emails
To the bank information to the confirmation email the user receives add the following tokens to the html email template or the Email Confirmation Header in the BuyNow settings:

[ACCOUNTNUMBER] – The bank account number entered in the BuyNow module settings and displayed on the step 2 checkout page when "Internet Banking" is selected as a payment method.

[BANKNAME] – Applies to the Internet Banking payment method only. The Merchant Bank Name field is entered in the BuyNow module settings and displayed to the user on the step 2 checkout page.

The two tokens above are added to the email template the user will receive an email confirmation with the merchant's internet banking information to complete the

transaction using their bank's online bill pay website. For more information on email tokens click here.

Telephone – The telephone payment method is typically referred to as Mail Order/Telephone Order or MOTO. Check this box if you want to offer users the ability to pay over the phone after they have completed the order online. When the user chooses the option to pay by telephone they are not required to enter any account information only their billing name and address. The user will then be allowed to complete the checkout without a real time credit card authorization.

Show Bill Me Later – When "Show Bill Me Later" is checked a dropdown list will display all the roles defined in your portal and allows you to select the role that the Bill Me Later payment method will apply to. The user is presented with the option to pay now using a credit card or pay later.

Bill Me Later By Role - This section that displays a list of checkboxes for all the DNN roles configured in your portal.

The Bill Me Later by Role checkbox list allows you to select multiple roles to conditionally display the Bill Me Later payment option on the Step 2 cart checkout page. During checkout if the user is logged in and a member of the role you selected to view the Bill Me Later payment method then the cart will display the "Bill Me Later" checkout option on the step 2 checkout page.

See the following screen for an example:

When the "Pay Now" option is selected the user enters credit card information normally.

When the user selects the "Bill Me Later" option the credit card fields are hidden and the user is able to checkout without entering a credit card.

Authorize Only - Check this box if you want to your credit card transactions to authorize only and manually settle later. The reason you might want to setup credit card processing for "Authorize Only" is because some states require that you physically ship product before settling a credit card transaction. The "Authorize Only" feature is supported on the following payment gateways:

- Authorize.Net
- PayPal Standard
- PayPal Website Payments Pro
- PayPal Payflow Pro
- Sage Payment Solutions (SagePay)
- UGSPAY (ugspay.com)

How to settle Authorize Only credit card transactions:

1. Navigate to the store admin menu and click manage orders.
2. Click the select button next to the order to you wish to settle to load the order detail screen.
3. Click the "Settle Credit Card" button at the bottom of the screen and a settlement (capture) request will be sent to the payment gateway settling the credit card transaction on the order and depositing the money to your bank account. Currently, Authorize.Net is the only gateway supported using the settlement button on the manage order details page.

For more information on settling credit card transactions see the Manage Orders and the Manual Credit Settlement sections below.

DD.   Shipping and Handling Setup

Smith Cart comes with many built in options to configure shipping in your online store.

- ⦿ Shipping Calculator (UPS, USPS, FedEx, Canada Post, Australia Post)
- ○ Zone Shipping By Quantity
- ○ Zone Shipping By Weight
- ○ Custom Ship Methods with Fixed Amounts
- ○ Custom Ship Methods By Order Amount
- ○ Custom Ship Methods By Quantity
- ○ Custom Ship Methods By Weight
- ○ Custom Ship Methods By Zip Code
- ○ Shipping By Order Amount
- ○ Product Level Shipping Costs
- ○ Free Shipping

Shipping Calculator – Click this option if you want the cart to calculate real time shipping rates on the cart screen while user checks out. When you select "Shipping Calculator" the following additional settings are displayed:

Shipping Carrier: USPS

Shipping Methods:
- ☑ Parcel Post
- ☑ Media Mail
- ☑ Priority Mail Flat Rate Envelope
- ☑ Priority Mail Small Flat Rate Box
- ☑ Priority Mail Regular Flat Rate Box
- ☑ Priority Mail Large Flat Rate Box
- ☑ Express Mail
- ☑ Priority Mail
- ☑ First Class

Address Type:
- ⦿ Auto
- ○ Residentual
- ○ Commercial

Carrier – United States Postal Service (USPS), United Parcel Service (UPS), Federal Express (FedEx) Canada Post, and Australia Post (DRC) shipping carriers are supported in the shopping cart for calculating real time shipping rates for the customer.   When you select carrier from the dropdown list the shipping methods corresponding to the carrier are displayed.

Canada Post Merchant CPC ID – If you have selected Canada Post as your shipping carrier you will need to enter you Canada Post Merchant CPC ID. If you need a Canada Post Merchant CPC ID please click here and register for an account.

Shipping Methods – Check the shipping methods that you want to be available to the user during checkout.

When you select "Shipping Calculator" the following settings are required:
- Shipping Carrier (UPS, USPS, FedEx or Canada Post)
- Select at least one shipping method

Additionally, the cart allows you to configure shipping methods by product if you have certain products that require specific shipping methods.

Address Type – The shipping costs returned from the real time shipping calculator are different based on the "ship to" address being residential or commercial. The "Address Type" setting allows you to configure Automatic, Residential or Commercial when communicating with the real time shipping calculator API to provide a more exact shipping cost. The following "Address Type" option are available:

- Auto - Shipping Calculator API determines address type (Residentual/Commercial) automatically.
- Residential - Sends residential flag to shipping calculator and calculates rates based on "ship to" residential address.
- Commercial - Sends commercial flag to shipping calculator and calculates rates based on "ship to" commercial address.

Enable Drop Ship Rule - This checkbox only applies to UPS shipping calculator. When "Enable Drop Ship Rule" is checked and a product in the cart has a zero quantity on hand the cart page will only display the UPS ground ship method and display a message "Overnight shipping is not an option for product xyz". This indicates the product needs to be drop shipped. The message displayed can be changed in the cart.resx file.

Combine Ship Methods - When "Combine Shipping Methods" is checked the cart will fill the dropdown list of shipping methods on the cart screen with the regular shipping methods selected for the carrier (UPS, USPS, FedEx or Canada Post) and custom

shipping method(s) defined in the custom shipping methods setup screen. The custom ship methods will appear as the last item(s) in the list of shipping methods.

Zone Shipping by Quantity – Select this radio button option if you would like the cart to charge shipping based on predefined zones (Locale -Country/State/Region), the total quantity of the items in the cart and ship method. If you select this option you will need to configure shipping zones and zones by quantity. To configure Zone Shipping by Quantity do the following:

- Navigate to the "Store Admin Menu" and click the "Shipping" button
- Click the "Zones" button at the top of the screen and define your shipping zones
- Click the "By Quantity" and define shipping costs by zone and by quantity
- Add shipping methods, quantity "From" and "To" ranges and a shipping cost.

See the section below titled "Zone Shipping by Quantity" for more information.

Zone Shipping by Weight – Select this radio button option if you would like the cart to charge shipping based on predefined zones (Locale -Country/State/Region), the total weight of the items in the cart and ship method. If you select this option you will need to configure shipping zones and zones by weight. To configure Zone Shipping by Weight do the following:

- Navigate to the "Store Admin Menu" and click the "Shipping" button
- Click the "Zones" button at the top of the screen and define your shipping zones
- Click the "By Weight" and define shipping costs by zone and by weight
- Add shipping methods, weight "From" and "To" ranges and a shipping cost.

See the section below titled "Zone Shipping by Weight" for more information.

Custom Ship Methods with Fixed Amounts – Select this radio button if you would like to display custom shipping methods and costs on the cart screen. In order to use custom ship methods you will need to create your custom ship methods from the store admin menu, shipping option. See section below titled "Custom Shipping Methods" to configure your custom shipping methods and costs.

Custom Ship Methods by Order Amount – Select this radio button if you would like the cart to charge shipping based on the total order amount of the items in the cart and ship method. If you select this option you will need to configure ship methods by order amount. To configure Custom Ship Methods by Order Amount do the following:

- Navigate to the "Store Admin Menu" and click the "Shipping" button
- Click the "By Order Amount" button at the top of the screen

- Add shipping methods, order amount "From" and "To" ranges and a shipping cost.

See the section below titled "Manage Shipping by Order Total" for more information

Custom Ship Methods by Quantity – Select this radio button if you would like the cart to charge shipping based on the total quantity of the items in the cart and ship method. If you select this option you will need to configure ship methods by quantity. To configure Custom Ship Methods by Quantity do the following:

- Navigate to the "Store Admin Menu" and click the "Shipping" button
- Click the "Shipping By Quantity" button at the top of the screen
- Add shipping methods, quantity "From" and "To" ranges and a shipping cost.

See the section below titled "Manage Shipping by Quantity" for more information.

Custom Ship Methods by Weight – Select this radio button if you would like the cart to charge shipping based on the total weight of the items in the cart and ship method. If you select this option you will need to configure ship methods by weight. To configure Custom Ship Methods by Weight do the following:

- Navigate to the "Store Admin Menu" and click the "Shipping" button
- Click the "By Weight" button at the top of the screen
- Add shipping methods, weight "From" and "To" ranges and a shipping cost.

See the section below titled "Manage Shipping by Weight" for more information.

Custom Ship Methods by Zip Code – Select this radio button if you would like the cart to charge shipping based on the customers ship to zip code. If you select this option you will need to configure ship methods by zip code. To configure Custom Ship Methods by Zip Code do the following:

- Navigate to the "Store Admin Menu" and click the "Shipping" button
- Click the "By Zip Code" button at the top of the screen
- Add shipping methods, zip code and shipping cost.

See the section below titled "Manage Shipping by Zip Code" for more information.

Shipping by Order Amount – Select this radio button if you would like the cart to charge shipping based on the total order amount of the items in the cart. If you select this option you will need to configure shipping by order amount. To configure Shipping by Order Amount do the following:

- Navigate to the "Store Admin Menu" and click the "Shipping" button
- Click the "By Order Amount" button at the top of the screen
- Add order amount "From" and "To" ranges and a shipping cost.

See the section below titled "Manage Shipping by Order Total" for more information.

Product Level Shipping Costs – Select this radio button if you would like the cart to use the fixed shipping costs you entered for each product in the product setup screen. See the section below titled "Product Level Shipping Costs" to configure your product level shipping costs.

Free Shipping – Select this option if you do not want to charge shipping in your store. If this checkbox is checked the shipping section below the cart will not be displayed to the user and no shipping will be charge to their order.

Free Shipping for Orders over X $$'s – Check this box if you want to offer free shipping on orders over a certain dollar amount. For example, if you enter "100" in this field and the customer's order subtotal is over 100 dollars then shipping will be free. If the customer's order subtotal is less than 100 then shipping charges will apply as normal. Free shipping for orders over X $$'s applies before discounts (coupons) and taxes.

Handling Setup

Handling Charge:

International Handling:

Combine Shipping and Handling: ☐

Charge Handling for Selected Products Only: ☐

Handling Charge – Enter the handling charge that you want charged for domestic orders during checkout. Handling is shown in the cart as a separate line item unless the combine shipping and handling checkbox is checked.

International Handling Charge – Enter the handling charge that you want charged to international orders during checkout. Handling is shown in the cart as a separate line item unless the combine shipping and handling checkbox is checked.

Combine Shipping and Handling – Check this box if you want to combine shipping and handling to a single line item dollar amount in the cart checkout, order confirmation screen and email invoice receipt send to the user and store admin. Combining shipping and handling as a single line item allows you to set a fixed price for shipping by choosing free shipping above and entering a handling charge.

Charge Handling for Selected Products Only - Check this checkbox if you would like to charge handling for selected products only. This checkbox works in conjunction with the "Charge Handling" checkbox in the product setup screen. When "Charge Handling for Selected Products Only" and "Charge Handling" are checked the cart will apply the following rules for charging handling:

- If no items in the cart have "Charge Handling" checked in product setup then the cart will charge zero handling.
- If at least one product in the cart has "Charge Handling" checked then use the cart will apply the handling amount configured in the BuyNow settings handling setup section.

EE.   Shipping Tax Calculation

Shipping Tax Calculation allows you to configure how the store charges tax on shipping.

Shipping Tax Calculation
* (Please select a shipping tax calculation)

- ○ Tax shipping always
- ● Never tax shipping
- ○ Tax shipping only for taxable products

Tax shipping always - The cart will tax shipping

Never tax shipping – The cart will not tax shipping

Tax shipping only for taxable products - Cart will look up the tax flag for the product and only tax shipping for products that you have setup as taxable.

FF.   Tax Setup

The following section describes the options for configuring tax in your store:

Flat Tax All Orders – Select this option if you want to charge a flat tax rate to all orders in the store. All customers will be charged tax regardless of what city, state/region or country they are ordering from. This option requires you enter a tax rate.

Flat Tax States in Taxable States List – When you select this option the following list boxes will be displayed allowing you to choose states to charge tax in:

Flat Tax States in Taxable States List allows you to charge a flat tax rate for all states listed in the "Taxable State" list. Only customers with a shipping address in the taxable state list will be charged tax. This option requires that you select one or more states in the taxable state list and enter a tax rate.

Use Tax Tables – Choose this option if you want the cart to lookup the exact tax rate in the tax tables.

Calculating Tax based on State/Province/Region and City
To setup the cart to calculate tax based on the state, province or region and city you need to populate the Smith_Tax table with the following data:

- State, province or region
- City
- Tax Rate

 When the Smith_Tax table is populated with the fields above the cart will look up the "ship to city" and "ship to state" or region/province in the Smith_Tax table and return the tax rate.

Calculating Tax based on State/Province/Region Only
To setup the cart to calculate tax based on the state, province or region only you need to populate the Smith_Tax table with the following data:

- State, province or region
- Tax Rate

 When the Smith_Tax table is populated with state/province/region and tax rate the cart will look up the tax rate based on the state/region/province in the Smith_Tax table and return the tax rate.

Taxable States
The taxable state feature is supported to work with the tax tables. If you select one or more states in the taxable state list only customers with ship to states in the taxable state list will be charged tax. If you don't select any states in the taxable states list than all ship to states will be used in the lookup in tax table lookup.

Populating the Tax table
In order for the cart to calculate tax using the tax table method the Smith_Tax table needs to be populated with the tax rates locales you want to charge tax in. The Smith_Tax table has the following fields:

- State (Region/Province)

- County (Tax District)
- City
- Tax Rate

To modify, add or import records to the tax table go to your SQL Management Studio and edit the table called "Smith_Tax".

When "Use Tax Tables" is selected the following checkbox setting is displayed:

Use Step 1 Dropdown List in Tax Lookup – When "Use Step1 Dropdown List in Tax Lookup" is checked the cart will look up the tax rate in the tax table by tax district (county) and state. The value selected in step 1 dropdown is used to filter the county field in "Smith_Tax" table. This option requires that you configure either tax districts or counties in the Step 1 dropdown list described below.

If you have configured taxable states in the taxable states list then the Step 1 Tax District dropdown will become a required selection only if the users state matches one of the states in the taxable state list.

Flat Tax Home Country – When you select this option the cart will compare the country entered by the user during checkout with the store country selected under the "Store Location Setup" section above. If the store country matches the country entered by the user the cart will charge tax on the order. This option requires that you select one or more states in the taxable state list and enter a tax rate.

HST (Canada) – HST stands for Harmonized Sales Tax and is the emerging tax standard for Canadian Provinces.   When you select HST as the tax option in your store the cart uses the tax table to lookup the province and get the tax rate. HST is only charged for customers in your home province. This option requires that you add provinces you want to charge tax in to the "Smith_Tax" table. Product prices should be entered exclusive of tax – meaning tax is not included in the product price when entering products in the product setup screen.

HST Calculation and Display for Goods sold from HST Province

Subtotal = Total of all the items in the cart: (unit cost) x (quantity)
S&H = Shipping & Handling
HST = (Subtotal + S&H) x HST rate (found in the tax table for the province)

GST/PST – GST stands for Goods and Services tax and PST stands for Provincial Sales Tax and is typically used for Canadian Provinces. PST is only charged for customers in your home province. Product prices should be entered exclusive of tax – meaning tax is not included in the product price when entering products in the product setup screen.

GST/PST calculates two taxes, the GST and PST

GST Calculation
Subtotal = Total of all the items in the cart: (unit cost) x (quantity)
S&H = Shipping & Handling
GST = (Subtotal + S&H) x GST rate (BuyNow tax rate setting) – 5% is the current GST rate.

PST Calculation
Subtotal = Total of all the items in the cart: (unit cost) x (quantity)
PST = Subtotal x PST rate (found in the tax table for the province)

Total Tax = GST + PST

No Tax – Select this option if you don't want to charge tax in your cart. If you choose this option no tax will be charge on all store orders.

Tax Registration Number – The Tax Registration Number field is only displayed when either the HST or GST/PST tax options are selected and allows the store owner (merchant) to enter their tax registration number. After a successful order is placed the "Tax Registration Number" will be displayed on the invoice (confirmation page after payment). This is a requirement for merchants operating in Canada, Australia and New Zealand.

Tax Registration #: 145495483

Configuring some products as taxable and others as non taxable – To configure some products in your store as taxable and others as non taxable select one of the following tax options:

- Charge Tax in All States
- Charge Tax in Home State
- Use Tax Tables

Next, go to the product setup screen and check the "Tax Exempt" flag for the products that you want to be non taxable.

Tax Rate – Enter the Tax Rate that you want to charge on orders in your store. If you enter a value in this textbox, the store will charge a flat tax rate (i.e. 7.75) on customer orders in the store. This option only applies to "Charge Tax All States" and "Charge Tax in Taxable State List".

Enable Tax Exempt by Role – This option allows you to select multiple roles to conditionally charge tax for. When you check this option the following role dropdown list will be displayed:

Enable Tax Exempt by Role ☐

Tax Exempt Role:
☐ All Users Tax Exempt
☐ Administrators
☐ Registered Users
☐ Subscribers
☐ Test Role
☐ Translator (en-US)
☐ US Access

During checkout if the user is logged in and a member of the role you selected as Tax Exempt then the cart will not charge tax on the order, all other users will be charged tax as configured.

VAT/GST Tax – Value added tax (VAT), or goods and services tax (GST) is a tax used by non United States countries that is levied on any product that is added to the cart.

When VAT/GST Tax is selected the following "Tax Type" dropdown list will be displayed that allows you to select VAT or GST.

Enable VAT/GST Tax: ☑

Tax Type: GST ▼

When VAT/GST Tax is checked the cart will charge the tax rate entered in the "Tax Rate" textbox and implement the VAT/GST tax calculation. You will need to load all product pricing inclusive of VAT/GST tax. During the cart checkout the confirmation pages and invoice VAT/GST is displayed as follows.

<u>**Example:**</u>
Product 1: $110
Product 2: $55
Sub-total: $165

Shipping: $22

Total (incl. VAT): $187
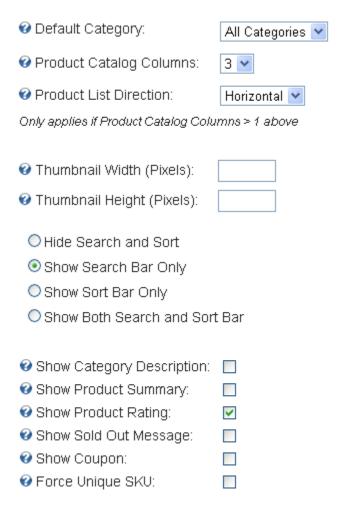
VAT included (10%): $17

The formula for the tax (VAT) is as follows:

VAT($) = Total($) * VAT(%) / (1 + VAT(%))

GG. Product Listing Page Setup

The following settings allow you to custom configure the product listing page in the cart. The product listing page is the first page when you navigate the page with the BuyNow module.

Default Category – Dropdown list used to select the default category that the product listing page displays. Select "All Categories" for no filter.

Product Catalog Columns – Formats the product listing page of your catalog for single column or multiple column layout.   Choose "1" for single column product layout, "2" for two column layout and so on.

Product List Direction – Formats the product listing page of your catalog to list products in either a vertical or horizontal direction according to the sort order configured for your products in the product setup screen.

Thumbnail Height and Width – When you upload product images the cart automatically creates thumbnail images. Enter the height and width in pixels for your thumbnail images.

Hide Search and Sort – Check this box if you would like to hide the search and sort bar at the top of the product listing page.

Show Search Bar – Select this option if you would like to show the product search bar at the top of the product listing page. The search bar does a wildcard search on the following fields:

- Product Sku
- Product Name
- Product Summary
- Product Description

Additionally, you can filter by category on the fields listed above.

Smith Cart is integrated with the DNN iSearchable interface so all your products are indexed and searchable using the regular DNN search facility.

For more information on building a searchable keyword list of search terms that may not show up in your product names or descriptions click here.

Show Sort Bar – Select this option if you would like to show the product sort bar at the top of the product listing page. The product sort dropdown list supports sorting products by the following options:

- Price low to high
- Price high to low

- Brand and product name A-Z
- Brand and product name Z-A
- Sku A-Z
- Sku Z-A
- New Arrivals
- Featured products
- Pre defined sort order

Show Search and Sort Bar – Select this option if you would like to show both the product search and sort bar.

Show Category Description – Check this box if you would like to display the category description on top of the product listing page.

Show Product Summary – Check this box if you would like to display the product summary on the product listing page.

Show Product Rating – Check this box if you would like to display product ratings above the price on the product listing page.

Sold Out Message - Check this checkbox if you want the cart to display a "Sold Out" message if the quantity on hand for any given product is zero. The "Sold Out" message or image will be displayed on the product listing page under the price field.

The text of the "Sold Out" message can be changed to any message you like by changing the sold out label in the productlist.resx file located in the app_localresources folder. The styling of the message can be changed by modifying the module.css. The following is a screen shot of the sold message on the product listing page:

The same setting is available in the product detail module settings that allow you to configure the "Sold Out" message to be displayed on the product details page. See the product detail module settings for more information.

Show Coupon – Check this box if you want to display the coupon textbox on the product listing page and offer your customer a discount on their order. You also can customize the label that is displayed next to the textbox on the product listing page.

If you check this box a coupon text box will be displayed on the product listing page for the user to enter their coupon code. If the user enters a valid coupon code their order total will be discounted by the amount or percentage of the coupon that you configured in the Manage Coupons section.

Show Categories – Check this box if you would like to display the categories within the BuyNow module itself. If the show categories checkbox is not checked then categories will be hidden. If you are using the categories module then you do not need to check this box.

Force Unique Sku - Check this box if you would like to enforce unique skus when entering products in the product setup page. When this box is checked the product setup page will do a lookup to make sure the sku entered does not already exist in the database. When this box is not checked duplicate skus will be allowed to be saved.

HH. General Cart Setup

The following settings allow you to configure general cart settings.

Product Detail Page – Select the page where you have added the product detail module. This tells the BuyNow module which page to navigate to when the user clicks a product from the product listing.

Button Theme – The cart comes with the following five professionally designed button themes:

- Black
- Blue
- Green

- Orange
- Silver

Select the button theme that matches your portal skin the best.

When you select a theme in the module settings the color theme for the following items is also changed:

- Checkout Progress Bar - Color of current checkout step
- Title bar in the "Shipping" and "Bill To" section of the cart page

Use Mini Cart – Check this box if you want to use the mini cart module.

Use MiniCart ☑

Use MiniCart Checkbox not checked (Default)
When the use mini cart checkbox is not checked and the user clicks the "add to cart" button from the product listing page, the product is added to the cart and the user is redirected to the main cart screen.

Use MiniCart Checkbox checked
When the use mini cart checkbox is checked and the user clicks the "add to cart" button from the product listing page, the product is added to the mini cart and the user stays on the product listing page.

Show Product Sku – Check this box if you would like to display the "Product Sku" column on the cart screen during checkout. If the "Product Sku" checkbox is not checked then the product sku will be hidden.

Show Quantity on Hand - Check this box if you would like to display the "Quantity on Hand" column on the cart screen during checkout. If the "Quantity on Hand" checkbox is not checked then the quantity on hand will be hidden.

Hide Price – When hide price is checked the "Price" field is hidden on the Product Listing page

When hide price is checked the "Price" field is replaced with "Request a Quote" on the following pages and emails:

- Cart
- Confirmation Page (Before Payment)
- Confirmation Page (After Payment)
- Customer and Admin confirmation emails

Figure 7 - Cart Page

This feature is useful if your site is "Request a Quote" only or if your business only sells to resellers that require prior approval before buying your products.

Hide Quantity – Check this box if you would like to hide the "Quantity" textbox on the product listing page. This is useful if your business only sells to resellers that require prior approval before buying your products.

Hide Shipping - Check this box if you would like to hide the shipping item on the following pages and emails:

- Cart
- Confirmation Page (Before Payment)
- Confirmation Page (After Payment)
- Customer and Admin confirmation emails

This feature is useful if your store does not offer shipping on products or you are selling downloadable products where there is no shipping.

Hide Sub Total Lines – Check this box if you would like to hide the sub total lines (Sub Total, Shipping, Tax, Discount and Total) on the following pages and emails:

- Cart
- Confirmation Page (Before Payment)
- Confirmation Page (After Payment)
- Customer and Admin confirmation emails

This feature is useful if your site is "Request a Quote" only or if your business only sells to resellers that require prior approval before buying your products.

Hide Add to Cart – Check this box if you would like to hide the "Add to Cart" button on the product listing page. Hiding the "Add to Cart" button turns your store into a product catalog only and will not allow users to checkout and purchase product. This is useful if your business only sells to resellers that require prior approval before buying your products.

Add to Cart Requires Login – Check this box if you would like to require the user to login before adding items to the cart. If this box is checked and the user clicks the add to cart button on the product listing page they will be directed to the login page if they are not already logged in. The cart login page has two options for the user to choose from; new user and existing user. If the user already has an account and logs in they are directed to the step 1 of the checkout. If the user is a new user they are directed to the cart registration page. For more information on the cart registration page click here.

Do Not Save Credit Card – By default the cart saves the credit card number in the database. Check this box if you do not want the cart to save the users credit card number to the database. This option is important if you are using a hosting service that is not PCI compliant and don't want to worry about PCI.

Save Card Security Code – By default the credit card security code (CVV) that is collected on the step 2 checkout page is not stored in the database. Check this box if you want the cart to save the CVV code to the database.

Please Note: If you are operating from the United States you will not be PCI compliant if you check this option. This checkbox should only be checked in the following scenarios:

1. You are operating from a country that allows the CVV to be stored in the database.
2. You are using the manual gateway option and you immediately delete the CVV code from the database after processing the customer's credit card.

Enable Inventory Management – Check this box if you would like the cart check for available inventory when a customer is checking out. When "Enable Inventory Management" is checked the cart will check for available quantity on hand, if quantity on hand for a product is less than the quantity the user has added to the cart, then the cart will display a message and not allow the user to proceed past the cart screen. If quantity on hand is available then the customer is allowed to proceed through the checkout and after a successful order, the quantity on hand field will be decremented by the quantity ordered. Product quantity on hand is managed in the product setup screen. When "Enable Inventory Management" is not checked the cart will not manage inventory as described above. For more information about configuring product variant inventory click here.

User Entered Amounts - Check this box if you would for the user to be able to enter a price for your product or service. This option is typically used for online bill payment or donation sites.

Enable Partial Quantities - Check this box to enable partial quantities in your store.

Show Surcharge – Check this box to show the surcharge in the cart order subtotal area

Surcharge – The surcharge field allows you to enter a percent to be added to the order subtotal. Note: Do not add the percent sign, just the number (i.e. 7.5)

The following screens display the surcharge field:
- Cart screen
- Confirmation page
- Confirm status page
- Email confirmations
- Manage orders screen

Insert Custom Checkout Page – Check this option if you would like to insert a custom page after the Step 2 checkout page. This is useful if you would like to insert a custom "Agree to Terms" page or an up sell page to cross sell the user on other products in your store.

Custom Checkout Page URL – Enter the full URL for the custom checkout page you would like to redirect to after the user to after the Step 2 checkout page. For example, http://www.mydomain.com/agreetoterms.aspx. To redirect to the next step in the checkout from your custom page just cut and paste the URL from cart "Confirm" page as the "href" property of you hyperlink or button.

Shipping Label - Allows you to change the "Shipping" title in the checkout to anything that fits your requirement. For example, if you are selling downloadable products you might enter "Customer Information" to replace the shipping label on the following screens and emails:
- Confirmation Page (Before Payment)
- Confirmation Page (After Payment)
- Customer and Admin confirmation emails

Cookie Timeout (Days) – Starting in cart version 3.91 the cart uses a cookie to persist the contents of the cart so if the user closes their browser and returns later the contents of their abandon cart will be automatically retrieved. The cookie timeout value allows you to configure the number of days before the cookie expires and the user's cart is automatically retrieved. Enter zero if you don't want a persistent cart. This may be useful in a scenario where users regularly share computers. Enter 365 for the cookie to

expire after a year. When a user successfully checks out and purchases the content of the persistent cart will no longer be retrieved. If you don't enter a cookie timeout value the cart defaults to 60 days.

II.   Wish List/Save Cart Setup

The following settings will enable you to custom configure the wish list/save cart feature in the cart.

Enable Wish List/Saved Cart – Check this box if you would like to enable the built in wish list/save cart feature. When "Enable Wish List/Saved Cart" is checked the "Save Cart" and "View Saved Cart" will be displayed on the cart screen as follows:

Figure 8 - Cart Screen

The following features are available using the Save Cart feature:
- Customer can save their cart or add to Wish List (Persists over Customer Visits also)
- Customer can save multiple carts
- Customer can move saved cart to regular cart for checkout
- Customer can add, update and delete saved carts

Enable Email Reminder – Check this box if you would like to enable an automated email reminder that is sent out to users whom have saved carts.

Email Reminder Days – Enter the frequency in days that you would like the saved cart email reminder to be sent out to the user. Enter the number of days since the cart was saved. The DNN scheduler is used to trigger the email to all users with saved carts that

meet the aging criteria defined by store admin. The email will be sent based on the number of days since cart was last saved.

For example, you can set an automated email to be sent to all users whose saved carts nearing 60 days old.

To customize the saved cart email to add your company logo, custom message, etc. you can modify the email html template "SCTemplate.htm" located off your portal root directory in /desktopmodules/smith.buynow/

The following email tokens are supported in the save cart email template:

[DISPLAYNAME] – The users first and last name
[DESCRIPTION] – The saved cart description
[CREATEDATE] – The date the cart of saved

The recipient email subject is auto populated using the following fields:
Portal Name - Saved Cart ID/Saved Cart Description
Example: Subject: Onlinewindows-12/Smith House

Enabling the automated email reminder
To enable the automated email reminder to be sent out to users who have saved carts who have saved carts that meet the aging criteria you defined in the "Email Reminder Days" field above to the following:

1. Go into the DNN Host menu > Schedule page and click on the Add Item to Schedule link.

 Add Item to Schedule

2. In the "Full Class Name and Assembly" field enter the following:

Smith.DNN.Modules.BuyNow.CartScheduler, CartScheduler

3. Check "Schedule Enabled" and enter 1440 in the "Time Lapse" field to schedule the email reminders to be sent out once a day. Click Update, and you should be good to go.

After you are finished the schedule screen should look like the following:

For more information see the section below titled <u>Wish List / Save Cart Feature</u>.

JJ.   Checkout Step 1 Setup

The following settings will enable you to add user defined fields to the Step 1 page of the cart checkout.

Checkout Step 1 Setup

Show Company Name: ☐
Show Textbox #1: ☐
Label #1: [   ]

Show Textbox #2: ☐
Label #2: [   ]

Show Dropdown: ☐
Dropdown Datasource: [User entered Values ▼]
Dropdown Label: [   ]
Dropdown Values: [   ] ✚ ✖

[   ] ⬆ ⬇

Show Date Field #1: ☑

Date Label #1: [Start Date]

Show Date Field #2: ☑

Date Label #2: [End Date]

Show Opt In Checkbox: ☐
Show Multiple Ship To: ☐

Show Company Name - When show company name is checked, a textbox will be displayed in Step 1 of the checkout titled company name. It is useful to customize your checkout in a B to B scenario. Upon successful checkout the company name field is saved to the "Smith_Customer" table and shows up on the confirmation screens, email receipt and reports.

DNN Profile Map Field – Select the DNN profile field you would like to map the company name field to. After successful checkout the company name entered by the user will be saved to the DNN profile selected.

Show Textbox #1 - When the show user defined textbox is checked, a textbox will be displayed in Step 1 of the checkout. The user defined textbox is useful to customize your checkout and can be used to create any new field you choose. It is stored in the database for reference later on.

Textbox Label #1 – Textbox label is the label that shows up in step 1 of the checkout to the left of the custom text box #1.

Show Textbox #2 - Second custom textbox. See description for Show User Defined Textbox #1 above.

Textbox Label #2 – Textbox label is the label that shows up in step 1 of the checkout to the left of the custom text box #2.

Show User Defined Field – When the show user defined field checkbox is checked a custom dropdown box will be displayed in Step 1 of the checkout. The user defined dropdown box is useful to customize your checkout. For example, you could create a user defined dropdown called "How did you hear about us" with dropdown values of Internet, Yellow Pages, or Referral. The option selected by the user in the dropdown during checkout is stored in the database for reference at a later time. The custom dropdown box will not be displayed to the user unless the checkbox is checked.

Dropdown Datasource – There are two options available for configuring the values in the dropdown; User entered Values and User entered SQL.

User entered values – When you select user entered values you will be able to type the values entered directly into the dropdown values textbox.

User entered SQL – When you select user entered SQL you will be using the native DNN Lists to populate the values in the dropdown. If you are not familiar with DNN Lists feature, login as host and navigate to the hosts – lists menu where you will be able to create your custom list. Once you have built your list using the DNN lists feature then you can enter a simple SQL statement to query the list and populate the datasource for your custom dropdown box.

Dropdown Datasource   User entered SQL

Dropdown Label   How did you hear about us

Dropdown SQL
```
SELECT Value, Text
FROM Lists
WHERE ListName = 'MyList'
```

Dropdown Label – Dropdown label is the label that shows up in the checkout to the left of the custom dropdown box.

Show Date Field #1 and #2 – Check this checkbox is you want to show custom date field 1 or 2 on the step 1 page of the cart checkout. Can be used to collect additional information from the customer like start date, end date, need order by date or anything that meets your business requirements.

Date Label #1 and #2 – Label that is displayed to the left of the user defined date field.

Show Opt In - Check this box if you would like to display the user opt in checkbox and message to your customer during checkout. If the "Show Opt In" checkbox is not checked then opt in checkbox and message will be hidden. If the user opts in during checkout a "True" value will be stored in the database for this customer. It is a good idea to check this box if you would like to engage your customers using email marketing. Requiring the user to check the "Opt In" check box makes you CAN-SPAM compliant and helps you win chargeback disputes if they arise.

Show Multiple Ship To – Check this box if you would like to the user to select from multiple ship to addresses in their address book. This feature allows the user to add, edit and delete ship to addresses. For more information on multiple ship to addresses click here.

KK. Confirmation Page Setup (Before Payment)

The Confirmation Page Setup (Before Payment) settings allow you to custom configure the confirmation page that is displayed to the user before payment is processed.

Show Listbox - When show listbox is checked, a listbox will be displayed on the confirmation page of the checkout. The user defined listbox is useful for adding terms and conditions or custom content to the cart confirmation page that is displayed to the user before the payment is processed.

Listbox Label – The Listbox label is the label that is displayed next to the custom list box displayed on the confirmation page.

Listbox Text – The Listbox Text is the text that is displayed in the custom list box displayed on the confirmation page.

Show Checkbox - When the show checkbox is checked, a checkbox will be displayed on the confirmation page of the cart checkout. The checkbox is useful for opt in marketing like adding a user to your email list or can be used to require the user agree to the terms and conditions displayed in the list box described above.

Checkbox Label – The checkbox label is the label that shows up next to the checkbox described above.

Checkbox Required – Check this box if you want to make the checkbox required before the user can check out and make payment.

LL. Confirmation Status Page Setup (After Payment)

The Confirmation Status Page Setup (After Payment) settings allow you to custom configure the confirmation status page that is displayed to the user after payment is processed.

Show Special Instructions - When "show special instructions" is checked, a multiline textbox will be displayed on the confirmation page of the checkout.

Show User Defined Textbox #1 - When the show user defined textbox is checked, a textbox will be displayed on the confirmation page of the checkout

User Defined Label #1 – Textbox label is the label that is displayed to the left of the custom text box #1.

Show User Defined Textbox #2 - Second custom textbox on the confirmation page

User Defined Label #2 – Textbox label is the label that is displayed to the left of the custom text box #2.

Show User Defined Date Field – User defined date field on the confirmation page. Can be used by the customer to indicate when they need their order by.

User Defined Date Label – Label that is displayed to the left of the user defined date field.

Show User Defined Field – When the show user defined field checkbox is checked a custom dropdown box will be displayed on the confirmation page of the checkout.

Dropdown values – When you select user entered values you will be able to type the values entered directly into the dropdown values textbox.

The following is an example of the final confirmation page with the custom fields defined as configured above.

Figure 9 - Confirmation Page

After the user fills in the fields in figure 8 above and clicks the "Next" button the values entered by the user in the custom fields will be saved to the database in the smith_orders table and a confirmation email will be sent to the 3rd party fulfillment house, customer and store admin with the special instructions and other custom fields entered on the confirmation page.

Success Redirect URL – Enter the full URL that you would like to redirect the user to after successful purchase (i.e. http://www.mydomain.com/mypage.aspx).

Success Redirect Button – Allows you to upload a custom button that will be added to the confirmation page. When the user clicks the button they will be redirected to the url you entered in the "Success Redirect URL" textbox above.

Enable OnCheckout Complete Event (Stored Procedure) – Allows you to call a custom SQL Server stored procedure that you program. The event that triggers the stored procedure being executed is a successful checkout in the cart. This is useful if you need to move new orders to a backend ERP or Accounting system. When you check the Enable OnCheckout Complete Event (Stored Procedure) checkbox a textbox will be displayed where you can enter the stored procedure you want to call:

Enable OnCheckout Complete Event (Stored Procedure): ☑

    Stored Procedure Name: dbo.dnn_Smith_ TransferOrder

The following is the naming convention for the stored procedure:

DatabaseOwner + ObjectQualifier + ModuleQualifier in front of your stored procedure.

- DatabaseOwner is usually "dbo"
- ObjectQualifier – Is assigned when you installed DNN (defaults to _dnn)
- ModuleQualifier is "Smith"

For example, a stored procedure titled "TransferOrder" should be named as follows:

"dbo.dnn_Smith_ TransferOrder"

Enable OnCheckout Complete Event (Web Service) - Allows you to call a custom web service that you program. The web service that is called can be on the same web server as the cart or on another externally hosted web server.   The event that triggers the web service call is a successful checkout in the cart. When you check the Enable OnCheckout Complete Event (Web Service) checkbox a textbox will be displayed where you can enter the web service URL you want to call:

Enable OnCheckout Complete Event (Web Service): ☑

    Web Service URL: http://240.151.25.88/service1.svc/GetLicense?oid=[ORDERID]&odids=[ORDERDETAILIDS]

The following is the naming convention for the Web Service URL:

http://domain.com/service1.svc/GetLicense?oid=[ORDERID],odids=[ORDERDETAILIDS]

- Domain Name – The domain name, server name or IP address for your web service
- Service Name – The full path to your web service
- oid=[ORDERID] – Token used by the cart to pass the order id to the web service
- odids=[ORDERDETAILIDS] – Token used by the cart to pass the order id to the web service

On successful order the cart will do an http post with name value pairs (NVP) in the querystring populated by tokens.

Example
In the BuyNow settings in the web service URL field enter the following URL:

http://domain.com/service1.svc/GetLicense?oid=[ORDERID],odids=[ORDERDETAILIDS]

[ORDERID] – The Order ID from the cart order.
[ORDERDETAILID] - Comma separated list of Order Detail IDs from the cart order.

1. The customer successfully checks out and purchases three products.
2. The cart saves the order to the database
    a. OrderID 123 is saved to the Smith_StoreOrders table
    b. OrderDetail IDs 4,5 and 6 are saved to the StoreOrderDetails table
3. The cart makes the following web request to your custom web service:

http://domain.com/service1.svc/GetLicense?oid=123,odids=4,5,6

4. Your custom web service receives the web service call and does the following:
    a. Consumes the parameters passed and executes some business logic based on your requirements (i.e. Query the Smith_StoreOrderDetail table and create license keys).
    b. Generates web response in the following format:

OrderDetailID1, LicenseKey1, OrderDetailID2, LicenseKey2, OrderDetailID3, LicenseKey3

For Example: 4, ABC2X55YTR, 5, RTY856PKIL, 6, EWS321BNH

Summary Web Service Request and Response

Web Client Request: http://domain.com/service1.svc/GetLicense?oid=123,odids=4,5,6
Web Server Response: 4, ABC2X55YTR, 5, RTY856PKIL, 6, EWS321BNH

This is the simplest and most open technique for communicating with a web service and is not tied to any specific platform or technology. Rather than passing all the order information in the querystring the cart passes the unique keys (Order ID and Order Detail IDs) that enables the web service to lookup any or all order information required. The only caveat is that the data returned from the web service may not contain any comma delimiters.

Database
The order is saved to the database before the web service call and the confirmation email is sent after the web service call returns. The purpose for this is to allow the custom web service to query the Order ID and Order Detail IDs in the Smith Cart database to get the order info (if needed) and the customer will get the order confirmation email with the fields the web service sends back.

The data passed back from the web service is saved to the "Smith_StoreOrderDetail" table in a field titled "WebServiceData".

Email Confirmation
To insert the data returned from the web service to the confirmation email add the token called [WebServiceData] in the email template in Smith Cart.

My Accounts Module
The "WebServiceData" field is viewable in the Smith Cart "My Account" module in the order detail section.

Real World Applications
The following are a few possible uses of the web service on checkout complete event:
- Updating another system with new cart orders.
- Sending orders to a 3rd party fulfillment house.
- Generating license keys when selling software

MM. Sign In and Registration Page Setup

The Sign In and Registration Page Setup section allows you to configure how the cart handles user sign up , account creation and registration.

Hide Sign In Page – Select this option if you want to hide the cart sign in page and not prompt the user to login during checkout.

Show Login Screen – Select this option if you would like to prompt the user to login as the first step in the checkout. When "Show Login Screen" is selected, the following sign in screen is displayed when the user clicks "Checkout" from the cart screen:

Figure 10 - Cart Sign In Screen

The purpose of this Sign in screen is to allow the user to login prior to the checkout screens so they do not have to re enter their shipping and billing information. If the user enters a valid login id and password then their shipping and billing information will be automatically populated on step 1 and step 2 of the checkout.

If the user is a new user and clicks the "Continue" button they have the option to checkout as a guest or create an account with the information collected in the checkout process.

Show Login on Confirmation Page – Check this box if you would like to show the login and password textboxes on the confirmation screen. The confirmation page is the final checkout screen before the order is submitted.

Require Login – Check this box if you would want to require the user to create a DNN login or create an account during checkout. If "Require Login" is unchecked the user is able to checkout anonymously.

Add to Cart Requires Login – Check this box if you would like to require the user to login before adding items to the cart. If this box is checked and the user clicks the add to cart button on the product listing page they will be directed to the login page if they are not already logged in. The cart login page has two options for the user to choose from; new user and existing user. If the user already has an account and logs in they are directed to the step 1 of the checkout. If the user is a new user they are directed to the cart registration page. For more information on the cart registration page click here.

The following are custom fields that can be defined and displayed on the cart registration page:

Show Company Name: ☑
Show Group Dropdown: ☑
Show Textbox #1: ☑
Label #1: Builders license number:
Show Textbox #2: ☑
Label #2: License Class:
Show Date Field: ☑
Date Label: Expiration Date:

Show Company Name - When show company name is checked, a textbox will be displayed on the registration page of the checkout titled company name. It is useful to customize your customer registration for a B to B scenario. It is stored to the database and show up on the confirmation screens, email receipt and reports.

Show Group Dropdown – Dropdown listing all the DNN roles you have defined in the Manage Order Level Discounts by Role admin screen. Show this dropdown if you are running a store that gives member discounts by role.

Show Textbox #1 - When show textbox #1 is checked a textbox will be displayed on the registration page of the checkout. The user defined textbox is useful to customize your checkout and can be used to create any new field you choose. It is stored in the database for reference later on.

Textbox Label #1 – Textbox label is the label that shows up on the registration page of the checkout to the left of the custom text box #1.

Show Textbox #2 - Second custom textbox. See description for Show User Defined Textbox #1 above.

Textbox Label #2 – Textbox label is the label that shows up in step 1 of the checkout to the left of the custom text box #2.

Show Date Field – User defined date field on the registration page. Can be used by the customer to indicate the expiration date of a valid license or you can define it for any purchase that suits your business.

User Defined Date Label – Label that is displayed to the left of the user defined date field.

For more information on the cart registration page click here.

NN.   Coupons

The following checkout turns on/off the coupon textbox on the cart page that allows the user to enter a coupon.

Coupons

Show Coupon: ☑

Show Coupon – Check this box if you want to offer your customer a discount on their order. If you check this box a coupon text box will be displayed on the cart screen for the user to enter their coupon code. If the user enters a valid coupon code their order total will be discounted by the amount or percentage of the coupon that you configured in the Manage Coupons section.

OO. Discounts

Discounts

- ○ No Discounts
- ◉ Enable Price Class Discounts
- ○ Enable Product Level Discounts
- ○ Enable Category Level Discounts
- ○ Enable Order Level Discounts By Role

No Discounts – Select this option if you are not offering discounts in your store.

Enable Price Class Discounts – Select this option to configure price class discounts in your store. In order to offer price class discounts you must configure price class discounts in the price class setup screen.   For more information on configuring price class discounts click here.

Enable Product Level Discounts – Select this option to configure product level discounts in your store. In order to offer product level discounts you must configure product level discounts in the product setup screen.   For more information on configuring product level discounts in the product setup screen click here.

Enable Category Level Discounts – Select this option to configure category level discounts in your store. In order to offer category level discounts you must configure category level discounts in the category setup screen.   For more information on configuring category level discounts in the category setup screen click here.

Enable Order Level Discounts By Role – Check this box if you want to enable order level discounts by role.   Order level discounts by role only when a user is logged in and a member of the role you define. Order level discounts by role are applied to the order subtotal and can be configured as a discount percent or discount amount.   To define order level discounts by role see the section titled Manage Order Level Discounts by Role below.

PP.   Member Pricing and Discounts

Member discounts allow you to offer users who belong to a specific role in your portal special pricing and/or percentage discounts on your products.

No Member Pricing – Select this option if you are not offering member discounts in your store.

Show Member Price - When the show member prices checkbox is checked the member pricing will be displayed to the user in your store on the product listing page, product detail page, cart and confirmation screens. The member prices are displayed alongside the regular prices defined for your products. The member pricing is defined in the product setup screen. For more information about product level member pricing and distributer pricing please refer to the product setup section below titled Product Level Member Pricing.

Show Member Prices By Role - When the show member prices by role checkbox is checked the member pricing will be displayed when the user is logged in and a member of the role you define. The member pricing by role is defined from the product setup screen. For more information about defining member pricing by role click here.

Enable Member Discount By Role – When you select this option the following member discount percent textbox and member role dropdown list will be displayed:

When you enter a value in the discount percentage field and choose a role from the dropdown box the cart will automatically apply a discount to the customer's order during checkout.   Member discounts are automatically applied to the order subtotal and do not require the customer to enter a coupon code. Percentages should be entered as numbers

without the percent sign. For example, a twenty percent discount should be entered as 20 and a ten percent discount should be entered as 10.

QQ. Email Setup

The following settings allow you to configure the store order confirmation emails.

Email Setup

* Store "To" Email: admin@smithcart.com

* Store "From" Email: support@smithcart.com

Third Party CC: ☑

Third Party Email Address: warehouse@tsl.com

Email Product Description: ☑

Email Download Link: ☐

* User Email Confirmation Subject:

```
Your Order
```

* User Email Confirmation Header:

```
Thank you for your order.<br>Your
Order Total is :[ORDERTOTAL]
```

* Admin Email Confirmation Subject:

```
New Order on Website
```

* Admin Email Confirmation Header:

```
New order from website for order
total of [ORDERTOTAL]
```

Store To Email Address – Enter the email address for your store administrator that you want the order email notifications to be sent to.

Store From Email Address – Enter the email address that you want the order email notifications to the customer be sent from.

Third Party CC – Check this box if you want to add a carbon copy (CC) email to the automated order confirmation sent after a successful purchase on the cart.

Third Party Email Address – Enter an email address that will be cc'd after a successful purchase on the cart.

Email Product Description - When email product description is checked the product description will be included next to the product name in the line item detail of the confirmation emails.

Email Download Link - When email download link is checked and a customer purchases a downloadable product the cart will email the customer a link to the downloadable products in the confirmation email.

 Email Manufacturers - When checked the Cart will send an email confirmation on a successful order to all the manufacturers associated with the products orders on successful order.

User Email Confirmation Subject - Enter the subject line for the email that will be sent to the customer upon successful registration and payment.

User Email Confirmation Header - Enter the text for the header of the email that will be sent to the customer upon successful registration and payment. The header will be displayed at the top of the invoice. Html is supported.

Admin Email Confirmation Subject - Enter the subject line for the email that will be sent to the portal admin upon successful registration and payment.

Admin Email Confirmation Header - Enter the text for the header of the email that will be sent to the portal admin upon successful registration and payment. Html is supported.

1.   Email Tokens – Order Confirmation

The following tokens can be entered in the User Email Confirmation Header and Admin Email Confirmation Header or the html email template to customize the email message.

Order Confirmation Email Tokens	
Token Name	**Description**
[USERNAME]	Customer's DNN User ID
[PASSWORD]	Customer's DNN Password
[FIRSTNAME]	Customer's first name
[LASTNAME]	Customer's last name
[EMAIL]	Customer's email address
[USERNAME]	Customer's Username
[ORDERID]	Purchase Order ID
[ORDERDATE]	Purchase Order date
[ORDERSTATUS]	Payment status of a purchase order
[ORDERTOTAL]	Total order amount
[CUSTOMDATE]	Custom date field from Step 1 of the checkout.
[CUSTOMDROPDOWN]	Custom dropdown field from Step 1 of the checkout.
[CUSTOMTEXTBOX1]	Custom textbox 1 field from Step 1 of the checkout.
[CUSTOMTEXTBOX2]	Custom textbox 2 field from Step 1 of the checkout.
[ACCOUNTNUMBER]	The credit card number or eCheck number from the step 2 checkout page.
[ROUTINGNUMBER]	Applies to eCheck and Check payment methods only. Collected on the step 2 checkout page.
[BANKNAME]	Applies to the Internet Banking payment method only. The Merchant Bank Name field is entered in the BuyNow module settings and displayed to the user on the step 2 checkout page.

Note: All email tokens must be entered in uppercase and be enclosed in square brackets as shown above.

2.   Ship Confirmation Email Setup

After an order is shipped and the tracking number and ship date is entered or imported for the order a ship confirmation email can be sent to the user that includes the tracking number and ship date for their order.   The following settings allow you to configure the ship confirmation email.

Ship Email Confirmation Subject - Enter the subject line for the ship confirmation email that will be sent to the customer when the store admin clicks the "Send Ship Email" button from the manage order details screen.

Ship Email Confirmation Header - Enter the text for the header of the ship confirmation email that will be sent to the customer when the store admin clicks the "Send Ship Email" button from the manage order details screen. Html is supported.

3.   Email Tokens – Ship Confirmation

 The following tokens can be entered in the Ship Email Confirmation Header or the html email template to customize the ship confirmation email message.

Ship Confirmation Email Tokens	
Token Name	Description
[ORDERID]	Purchase Order ID
[SHIPMETHOD]	Shipping Method used
[TRACKINGNUMBER]	Shipping Tracking Number
[SHIPDATE]	Order Shipping Date

Note: All email tokens must be entered in uppercase and be enclosed in square brackets as shown above.

Save your settings - When you are finished configuring the settings above click the "Update" button at the bottom of your screen.

4. Customizing the Email Confirmations

To further customize the order confirmation email to add your company logo, custom message, etc. you can modify the email html templates located off your portal root directory in /desktopmodules/smith.buynow/
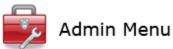
- OrderTemplate.htm – standard email template
- SHOrderTemplate.htm – email template used when shipping and handling is combined
- OrderSurchargeTemplate.htm – email template used when surcharge is enabled in the cart.

Congratulations, your new shopping cart is almost ready for use

VII. Store Admin Main Menu

The Store Admin Menu is the main menu that provides all the functionality that you will need to administer your store, including managing your categories, products, orders and more.

To load the store admin menu click the "Admin Menu" button at the top of the BuyNow module.
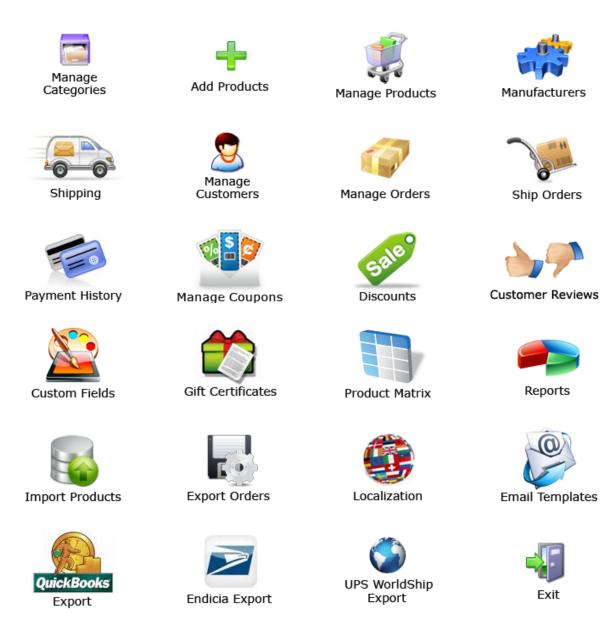
After you click the "Admin Menu" button the following screen will load:

Store Admin Main Menu

A. Setting permissions on the Store Admin Menu

Smith Cart leverages the built in role capabilities of DNN to grant users access to one or more buttons on the store admin menu.

The following DNN Roles are built in to Smith Cart to control button level permissions on the store admin menu:

User Role Name	Permissions
SCAdmin	All Buttons
SCReports	Reports button
SCAddProducts	Add Products button
SCManageProducts	Manage Products button
SCManageCategories	Manage Categories button
SCManageManufacturers	Manufacturers button
SCManageOrders	Manage Orders button
SCManageCustomers	Manage Customers button
SCManagePayHist	Payment History button
SCManageShipping	Shipping button
SCManageCoupons	Manage Coupons button
SCManageDiscounts	Discounts button
SCCustomerReviews	Customer Reviews button
SCGiftCertificates	Gift Certificates button
SCManageCustomFields	Custom Fields button
SCProductMatrix	ProductMatrix button
SCProductLocalization	Localization
SCImportProducts	Import Products button
SCExportOrders	Export Orders button
SCUPSExport	UPSExport button
SCEndiciaExport	Endicia Export button
SCQuickBooksExport	QuickBooks Export button
SCShipOrders	Ship Orders button/screen
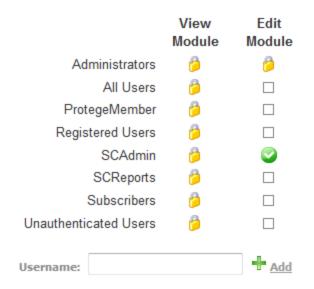
By default all DNN Host and Administrators level accounts have access to all the buttons on the store admin menu. However, in most cases users that are tasked with managing the store will not have DNN Host or Administrator level permissions. Smith Cart supports this scenario by using built in DNN roles that allow you to grant button level permissions to the store admin menu.

Granting Permissions to All Store Admin buttons – SCAdmin Role

1. Navigate to the DNN Admin - > Security Roles menu option
2. Select "Add New Role"
3. Enter the role name "SCAdmin" and click update
4. Navigate to the DNN Admin - > User Roles menu option
5. Assign the "SCAdmin" role to your desired user
6. Go to your BuyNow module settings "Permissions" section

In the permission section of the module settings check the "Edit" checkbox for the SCAdmin role.

Click the update button and the bottom of the screen to save the new permissions. The user that you have designated to manage your store will now have permissions to all buttons on the store admin menu but will not have access to DNN admin functions.

Granting Permissions to a single Store Admin button

To grant user access to a single button on the store admin menu the same steps described above for adding roles and permissions should be followed but instead of using the "SCAdmin" role you would use the role corresponding to the store admin button.

Granting Permissions to groups of Store Admin buttons

To grant user access to several buttons on the store admin menu you need to setup DNN Role Groups.   DNN Role Groups simply act as containers for groups of individual Smith Cart button roles.

For example, to grant access to a data entry person (Mary) to enter products in the store follow these steps:

1. From the DNN Admin menu create a new user "Mary"

2. From the DNN Security Roles menu:

     a. Add the role group "Data Entry"
     b. Add the following Smith Cart roles:
        i. SCAddProducts
       ii. SCManageProducts
      iii. SCManageCategories
      iv. SCManageManufacturers
     c. Add the Smith Cart roles to the "Data Entry" role group

3. Go to your BuyNow module settings "Permissions" section. In the permission section of the module settings check the "Edit" checkbox for the "Data Entry" role.

4. Click update to save

Mary will now have access to only the Add Products, Manage Products, Manage Categories and Manage Manufacturers buttons on the Store Admin Menu.

The concept above using DNN Role Groups along with Smith Cart button roles can be used to create an unlimited number of role groups with different button level permissions.

VIII. Category Management

Smith Cart provides the ultimate in flexibility when managing categories:

- Unlimited Categories/Departments/Manufacturers
- Categories and Departments can be fully nested to any level desired (e.g. sub-categories, sub-sub-categories, etc)
- Products can be mapped to more than one category ,sub category, sub-sub-categories, etc

Before you add products to your shopping cart you need to add at least one category. To add or edit product categories click the button titled "Manage Categories" from the Store Admin Menu.

The following screen will be displayed when you click Manage Categories".

Add New Category

Sort Order:

Category Name:

Parent Category: -Root Level-

URL Keywords:

Only lowercase letters, numbers, hyphens, underscores. No spaces.

Share:

Category Description:

Design   <> HTML   Words: 0 Characters: 0

Add New Category

	Category ID	Sort	Category Name	Description	Parent Category	URL Keywords	Share		
Qty Discounts	1	1	War Games	Xbox war games are exciting and provide first person shooter action. Ages 12 and up. BuyNow		xboxgames	Yes	Edit	Delete
Qty Discounts	4	2	Sub of Category One - One		War Games		No	Edit	Delete
Qty Discounts	5	3	Sub of Category One - Two		War Games		No	Edit	Delete
Qty Discounts	6	4	Sub of Category One - Three		War Games		No	Edit	Delete
Qty Discounts	2	5	Sports Games				No	Edit	Delete
Qty Discounts	7	6	Sub of Category Two - One		Sports Games		No	Edit	Delete
Qty Discounts	8	7	Sub of Category Two - Two		Sports Games		No	Edit	Delete

A.   Add New Category

Sort Order - The sort order field controls the order in which the categories are displayed in the product catalog. Enter a numeric number from 1 to 999. The product categories will be sorted in ascending order by the sort order field.

Category Name - Enter the product category that you wish to add in the "Category Name" field.

Parent Category – The parent category is used to define subcategories and nested sub categories. If you do not select a parent category and leave the dropdown as "Root Level" then you are defining a top level category. If you choose a parent category from the dropdown list you are defining a subcategory or a sub sub category, etc.

URL Keywords – The keywords entered in this field will be dynamically added in the URL of the product listing page when a user clicks on a category from the categories module. Enter keywords that are relevant and targeted towards your category. Targeted keywords in the URL help your SEO rankings. If you enter several keywords use hyphens as dividers and not underscores as hyphens have proven better for SEO.

Share – The "Share" checkbox only applies if you have added more than one cart module on different pages in your portal. This feature is used in situations where you want multiple product catalogs on different pages of your website. For example, if you are selling books and computers on your website and you wanted to have one page dedicated to books and another page dedicated to computers. If the share checkbox is checked for a particular category the category will be displayed in all product catalogs on any pages where you have added the shopping cart module. If the share checkbox is not checked then categories added to your first cart module will remain separate from categories added to your second cart module.

Category Description - Rich text editor can be used to manage the category description field. Category Description is displayed at the top of the product listing page when the category is clicked in the category menu. By default the category description is not displayed on the product listing page. To enable the display of category description navigate to the buynow settings under product listing section and check "Display Category Description".

Add New Category Button - After you have entered your category information click the "Add New Category" button to add the new category or subcategory to the database.

Quantity Discounts – To setup quantity discounts for a category click the quantity discounts link next to the category.

B.   Edit and Delete Categories

Edit Categories

From the grid view that lists your categories click the edit link next to the category you wish to edit. Make the changes to the sort order or category fields and click the update button to save your changes. Click the cancel button to cancel your changes.

Delete Categories

From the category grid that lists your categories click the delete link next to the category you wish to delete.

C.   Category Quantity Discounts

Smith Cart has a built-in quantity discounting which allows you to discount bulk purchases of a single category of products or multiple categories of products. The feature allows unlimited numbers of discount levels. Discounts must be individually configured at the category level. Discounts may be expressed in dollars. When you click the "Quantity Discounts" link in the category quantity discounts screen is displayed:

Manage Category Quantity Discounts - Kevin's Catagory

Quantity From:

Quantity To:

Discount Amount:

Group:

Add Quantity Discount

Quantity From	Quantity To	Discount Amount	Group		
2	6	25.00	Discount	Edit	Delete
7	10	50.00	Discount	Edit	Delete

If quantity discounts are configured for a category the cart will automatically generate the discounts based on the quantity of items in the cart.

IX.   Vendors/Manufacturers Management

To add or edit manufacturers click the button titled "Manufacturers" from the Store Admin Menu.

Manufacturers

The following screen will be displayed when you choose "Manufacturers".

Manufacturer Name	First Name	Last Name	Address	City	Country	State/Region	Postal Code	Contact Name	Email	Phone	Fax		
VeriFone			,									Edit	Delete
Hypercom			,									Edit	Delete

Manufacturer Name: *

First Name:

Last Name:

Address Line 1:

Address Line 2:

City:

Country: United States

State/Region: --Select State--

Zip/Postal Code:

Fiscal ID:

Contact Name:

Function:

Occupation:

Email:

Phone:

Fax:

Comments:

Add New Manufacturer

A. Add New Manufacturer

Enter the information of the Manufacturer that you wish to add in the "Manufacturer Name" dropdown. After you have entered your category click the "Add New Manufacturer button to add the new Manufacturer.

B. Edit and Delete Manufacturer

Edit Manufacturer
From the grid view that lists your Manufacturers click the edit link next to the Manufacturer you wish to edit. Make the changes to the Manufacturer or information

and click the update button to save your changes. Click the cancel button to cancel your changes.

Delete Manufacturer

From the grid view that lists your Manufacturer click the delete link next to the Manufacturer you wish to delete.

X.   Product Management

To add or edit products click the button titled "Add Products" from the Store Admin Menu.

Add Products

The following screen will be displayed when you choose "Add Products".

A.   Adding and Editing Products

Manufacturer - Select the manufacturer for your product from the dropdown list.

Product SKU – Enter your product sku or model number in this field. The product sku is typically a unique number that identifies your product for inventory purposes.

Product Name - Enter your product name in this field. The product name is displayed to the user in the product list, product detail and cart screens in the shopping cart.

Upload Primary Photo – The product photo uploaded here will be displayed to the user in the product details page. Additionally, the cart will automatically generate a thumbnail image displayed on the product listing page. The size of the thumbnail image is determined by the thumbnail height and width defined in the cart admin settings under the general cart configuration section. Click the browse button and a file dialog box will be displayed where you can navigate and select your product image you wish to upload. When you click the submit button at the bottom of the screen your image will be automatically upload to the server and a path to the image will be stored in the products table.

The cart supports any image size you upload and supports jpg, gif and png image types.

Unit Cost – The unit cost is the cost you want to charge for your product. Enter your product unit cost here. If you set the unit cost for a product to zero it will enable "free checkout". Free checkout will allow the user to add the zero cost product to the cart and checkout, bypassing the payment page where the user normally enters their credit card number.

Weight (Ounces) – Enter your product weight here. The weight field is used for calculating shipping costs during checkout. Weight should be entered as ounces. If you enter a weight greater than zero the shipping calculator will calculate real time shipping costs. If the weight of the all the products in the cart is zero, then the cart will not charge shipping costs.

Product Dimensions – Specify pixel dimensions for thumbnails generated and displayed for the product detail page.

Quantity on Hand – The quantity on hand field is used to manage your available inventory for your product. Enter the current available product quantity you have available in your inventory. Every time a user purchases a unit of product the quantity on hand is decremented by the number of units purchased. If a product has a quantity on hand of zero or if the customer tries to purchase a quantity of product that exceeds the available on had then the cart will display an out of stock message on the cart screen and not allow the user to proceed to checkout.

Summary – Enter a summary product description here.

Tab Name – Enter a tab label for the tabbed product description that is displayed on the product detail page. The product description tab control supports up to 5 tabs.

Description – Enter a detailed product description using the rich text editor. HTML fully supported. The product description tab control supports up to 5 tabs.

Sort Order:	1
Tax Exempt:	☐
🌐 Charge Handling:	☐
Featured:	☐
Hide Price:	☐
Hide Quantity:	☐
Hide Thumbnail:	☐
Require Login:	☐
Share products between catalogs:	☐
Show custom fields on product detail page:	☐
Deactivate:	☐
Minimum Order Quantity:	-1 (Enter -1 for No Minimum Order Quantity)
Maximum Order Quantity:	200 (Enter -1 for No Maximum Order Quantity)
Lead Time:	5
Price Class:	-Select-
Affiliate URL:	

Figure 11 - Product Setup Screen

Sort Order - The sort order field controls the order in which the products are displayed in the product catalog. Enter a numeric number from 1 to 999. The products will be sorted in ascending order by the sort order field.

Tax Exempt – Check this box if you do not want to charge tax for the product.

Charge Handling - This checkbox works in conjunction with the "Charge Handling for Selected Products" checkbox in the BuyNow module settings under the handling setup section. When "Charge Handling for Selected Products" and "Charge Handling" are checked the cart will apply the following rules for charging handling:

- If no items in the cart have "Charge Handling" checked in product setup then the cart will charge zero handling.
- If at least one product in the cart has "Charge Handling" checked then use the cart will apply the handling amount configured in the buynow settings handling setup section.

Featured – Check this box if you want the product to be displayed in the featured products module.

Hide Price - When checked hides prices for a specific product. This is useful when setting up a product catalog only or setting products that need to be quoted. When hide price is checked the price of a product is replaced with "Request a Quote".

Changing the "Request a Quote" text
To change the "Request a Quote" text open the resx file you want to change the text on (i.e. Cart.resx) and change the value for the "RequestQuote" property.

Note: If a product is configured for zero price the checkout skips step 2 where the user enters there credit card information.

Hide Quantity - When checked hides quantity for a specific product. This is useful when setting up a product catalog only or do not want the user to change the quantity for a product.

When hide price or hide quantity is checked the price will be removed on following screens and confirmation emails:

- Product listing page
- Product details page
- Cart page
- Confirmation page before payment
- Confirmation page after payment
- User and admin confirmation email

Hide Thumbnail - When checked the thumbnail image will not be displayed on the product listing page of the catalog.

Require Login – The "Require Login" checkbox, when checked, will require the user to enter a user id and password before checking out. The require login checkbox in the add products screen is associated with a product or products and will only require the user to login if they have the products in their cart that require login. The cart settings screen also has a require login checkbox, when checked will require the user to create a login for any product they purchase.

Share products between catalogs – The "Share" checkbox only applies if you have added more than one cart module on different pages. This feature is used in situations where you want multiple product catalogs on different pages of your website. For

example, if you are selling books and computers on your website and you wanted to have one page dedicated to

books and another page dedicated to computers. If the share checkbox is checked for a particular product the product will be displayed in all product catalogs on any pages where you have added the shopping cart module. If the share checkbox is not checked then products added to your first cart module will remain separate from products added to your second cart module.

Multiple store support – Smith Cart allows you to add the BuyNow module to multiple pages in your DNN portal The allows you to create of an unlimited number of stores on your Web site to offer different product selections, presentations, payment methods, shipping rates, and tax setup. This is useful for such purposes as building a members-only store or creating a discount store for clearance items. The share flag can be useful in this context to share products across multiple buynow modules eliminating the need to re enter your products in each buynow module.

Show custom fields on product detail page – This checkbox allows you to show/hide the user defined fields on the product details page by product.

Deactivated – Check this box to deactivate the product. When a product is deactivated it will not show up in the front end product catalog and will not be available for purchase.

Minimum Order Quantity - Enter the minimum number of units required to purchase this product. If user clicks add to cart with a quantity less than the min order quantity then the cart will display the message "Product XYZ" has a minimum order qty of X units" and will not allow the product to be added to the cart until the user enters a qty that meets the minimum order quantity threshold.

Maximum Order Quantity - Enter the maximum number of units required to purchase this product. If user clicks add to cart with a quantity greater than the max order quantity then the cart will display the message "Product XYZ" has a maximum order qty of X units" and will not allow the product to be added to the cart until the user enters a qty that meets the maximum order quantity threshold.

Lead Time - Enter the number of days before the product can be shipped. Used to indicate when a product is not "In Stock" or in the warehouse. If lead time is configured for a product when a user adds the item to the cart then the lead time will be added to cart after the product name and variants so the customer can see when the product is being shipped. The lead time by default is styled red and can be changed to any color by changing the "LeadTime" style in module.css.

Price Class - Allows for mix and match pricing by "Price Class" which allows you to group products by price class and calculate quantity discounts by price class. If

"Discount Price by Role" is configured in the cart and the user is a member of the role it would override price class discounting. For more information about setting up price classes click here.

Affiliate URL – The affiliate URL is used if you are using an affiliate like ClickBank to sell your products. if you have entered a link in the Affiliate URL field and the user clicks the "Add to Cart" button then the cart will open a new window with the link you entered in the Affiliate URL field and the user will complete the checkout for the product on the affiliate's site. The Smith Affiliate tracking module is integrated with ClickBank to receive instant notification for purchase and refund transactions. Please see the section below titled "Affiliate Tracking Module" for more information on ClickBank instant notifications.

B.   Product Coupon Options

The following fields allow you to configure coupon options per product:

Coupon Setup

Require Coupon: ☐

Exclude Coupons: ☐

Items in SKU: 1

Require Coupons – Check this box if you would like to require a coupon or access code in order for the user to checkout and purchase the product.

Exclude Coupons – Check the exclude coupons checkbox if you wish to exclude this product from being discounted when the user enters a valid coupon code during checkout. This enables you to choose which products are discounted when you have an active coupon enabled in your cart.

Items in Sku – Items in Sku is used if you are bundling multiple products in a single sku. For example, a "Buy 2 Get 1 Free Deal". It is used in conjunction with the coupon feature giving you the ability to control the coupon discount. For example, if you are running a promotion for 5 dollars off and individual products and the customer purchases the buy 2 get 1 free you can give them 10 dollars off. This feature allows you to use a single coupon codes for the single items or the bundled items.

C.   Downloadable Products

The following fields allow you to configure your electronic or downloadable products:

Downloadable Product Setup

Download URL: http://www7.smith-consulting.com/Products/BillingManager/BillingMgr02.22.56.zip

Product Path:

Auto Generate GUID: ☐

Encrypt URL: ☐

Smith Cart supports selling soft goods and downloadable products.

1. Secure URL's

Smith Cart fully supports secure url's for your downloadable products that hide/mask the url from the user. The cart will prevent the user from locating the download url using the following methods:

- Cart uses server side code for generating download url so the product url is fully hidden from the user.
- Prevents download url from showing up in the browser status bar when user hovers their mouse over download button.
- Prevents user from getting the download url by right clicking on the download button and clicking properties.
- Product download url is not visible in browser source.

Download URL – Enter the URL to the product. Before entering the path in the "Download URL" field do the following:

1. Choose a folder on your server where your downloadable products will reside.
2. The location for your downloadable products can be off the portal root of your DNN site or the files can be located on another server.
3. Next, copy your electronic product files to the directory you just created on your server. Uploading your files can be done using the DNN file manager, FTP or remote desktop to your server.

   Note: By allowing you to copy your downloadable products to your server using FTP you can copy as many products as you wish in a single operation rather than uploading your products one by one. This should save you quite a bit of time!

4. Enter the URL for your downloadable product in the "Download URL" field

URL syntax for downloadable products:

http://domain-name/portals/portal#/subdir/downloadablefile

Example URL:

http://www.mydomain.com/portals/5/myproducts/myproduct.zip

The download button will show up on the confirmation page after successful purchase next to the product in the order details. The download button is also available to the user in the My Accounts module for downloading after purchase.

The following is a screen shot of the product details section of the confirmation page showing the download button:

Order Details:

Product Name	Quantity	Unit Price	
Dance Central for XBox 360 Kinecta	2.00	$82.95	Download Now

Sub Total :	$165.90
Discount :	-$0.00
Shipping Fee :	$0.00
Handling Charge :	$11.50
Sales Tax 7.75% :	$12.86
Total :	$190.26

Figure 12 - Downloadable Products on Confirmation Page

Auto Generate GUID – The auto generate guid provides additional security features for preventing piracy of your downloadable products. When this checkbox is checked the cart will automatically generate a unique GUID and add the GUID to the end of the download url.

Auto Generate GUID Example:

Download URL: http://www.mydomain.com/somefolder/somepage.aspx?guidid=

When auto generate GUID is checked the download url generated by the cart will be the following:

http://www.mydomain.com/somefolder/somepage.aspx?guidid=23DQ42WT8R4

Notice in the example above the question mark and the variable name in the querystring are added by the admin which gives you the flexibility to add additional querystring parameters and name the variables anything you want.

In the example above, the aspx page named "somepage.aspx" is used as a gatekeeper program that control passes to when the user clicks the download button after successful purchase. The Gatekeeper Download Manager is a companion program developed to work with Smith Cart and provides additional levels of security for your electronic products.

Features include:

- Anti piracy features for electronic products
- Velocity Checks - number of times and/or number of days to allow file to be downloaded by a recipient
- PDF Watermarking/Stamping - Stamp every page with pre defined fields from the order. Stamps are secure and cannot be removed.

Please contact Smith Consulting at sales@smithcart.com for more information about The Gatekeeper.

2.   Securing your Downloadable Products and File System

Using the DNN file manager create a "Secure File System" folder to store your electronic products. The files within this directory will have .resources appended to the filename. The secure file system prevents hackers from downloading your soft goods directly using a browser as IIS and Asp.Net will not allow .resources files from being downloaded.

In order to generate the download link for your soft goods that you have secured using the secure file system you need to utilize the DNN LinkClick.aspx file processor to serve the file up which makes it possible for you to set the file view permissions to restrict the viewing to just authenticated users or any other selected role. Once you generate the DNN linkclick url just cut and paste the url to the download url field in the Smith Cart product setup screen and your electronic products will be fully protected.

Step by Step Instructions:

1. From the dnn admin menu - file manager navigate to your portal root and enter a folder name in the "Folders" field
2. Select the option "Secure - File System" from the folders dropdown list and click the "Add folder" button
3. Using dnn file manager upload or copy your downloadable product files to your new secure folder you just created
4. Go to any dnn page and from an html module click the hyperlink icon from the rich text editor and create a file system link to the file in your secure folder.
5. DNN will create a secure linkclick url

6. Copy and paste the link click url to your clipboard or notepad
7. Go to the Smith Cart product setup screen for your downloadable product that you want to secure
8. Paste the linkclick generated in step 6 in front of the full url to your portal root. It should look something like this:

http://www.yourdomain.com/Portals/[yourPortalRoot]/Products/LinkClick.aspx?fileticket=0NI7XZREIeB0%3c&tabid=114

D.   User Role Setup by Product

The user role setup section allows you to configure the cart to add the user to a DNN role after successful purchase of a product
.

Role Name	Add Role	Role Expiration (Days)
Administrators	☐	
GC Monthly	☐	
Registered Users	☐	
Subscribers	☐	

Role(s) to Add after Successful Payment – The shopping cart module allows you to select multiple roles to add a user to upon successful purchase and credit card authorization, the user will be placed in the roles that you choose here. All the currently defined roles in your DNN portal will be available as checkboxes.

Role Expiration (Days) – Roles expiration days is an optional field and allows you to define the number of days to expire the users role after purchase. If a user is already a member of the role when they purchase the cart adds the purchased days to the end of the expiry date or the purchase date whichever is the later. If role expiration is left blank the role will not expire until you remove the role from the user.

For example, if a customer orders a 1 year subscription (example on Jan1, 2010) their expiry date for that role will be Jan 1, 2011. If they then order a product that comes with a free 90 day subscription, on February 1, 2010 the cart will update their expiry date to April 1, 2011 which is 90 days from their current role expiry date.

E.   Bundled Products

Bundled products are sometimes referred to as "Kit" products. Bundled products are products that are bundled together with other products. Bundled products contain a master sku and one or more sub skus. For example, if you sell software you could create a bundled product that included the software package and one year of support at a discounted price.

The following is a screen shot of the bundled product setup screen:

The list box on the left titled "Master Products List" contains a listing of all products currently setup in your store. The list box on the right titled "Bundled Products" contains a listing of the products you have selected as bundled products.

To create a bundled product do the following:

1. Edit the master product that you want to add a sub product to.
2. In the list box on the left, highlight the product you want to add to the bundle
4. Click the arrow button pointing to the right >>
5. Click the "Update" button and the bottom to save

When the user adds a bundled product to their cart the master product and all sub products defined in the bundle will be automatically added to the cart.

Use Primary Product Price & Weight – When this checkbox is checked the price and weight of the bundled product will be the price and weight of the master product. When this checkbox is NOT checked the price and weight of the bundled product will be the SUM of the price and weight of the master product and all sub products defined in the bundle.

F. Recurring Billing Setup

Smith Cart supports recurring billing for the following payment gateways:
- Authorize.Net
- PayPal Website Payments Standard
- PayPal Website Payments Pro
- First Data Global
- Blue Pay
- National Merchants Inc (NMI)

Recurring Billing Options

Recurring Billing flag	☐ (Applicable to Authorize.Net, PayPal Website Payments Standard, First Data, BluePay, MyGate, eWay and NMI gateways)
Subscription Interval :	-Select-
Total Occurences :	0 ("9999" = Infinite recurring billing)

Recurring Billing Flag - Check this box is you want to enable recurring billing for a particular product.

Subscription Interval – This dropdown box is where you configure the interval for recurring payments. The following recurring billing options are available:
- Daily
- Weekly
- Every 2 Weeks
- Monthly
- Every 2 Months
- Quarterly - Every 3 Months
- Semi-Annual
- Yearly

For example, if you choose monthly and the user purchases a product on 1/1/09, the first payment will be automatically billed on 1/1/09 at midnight. Their second payment will be billed on 2/1/09 and so on.

Total Occurrences - This setting only applies if you have checked the box for recurring billing above. Enter a numeric value for the number of times that you want the recurring billing to charge the customer's credit card. Enter "12" to bill the customer's card 12 times. Enter "9999" to have the recurring billing continue indefinitely.

XI. Product Category Management

Smith Cart allows products to be mapped to more than one category, sub category and nested sub categories.

When you click the "Categories" button at the top of the product management screen the follow screen is displayed.

To assign a product to a category just check the desired category/categories and click the "Save Categories" button.

XII. Adding Additional Product Photos

Smith Cart allows you to add up to six product photos. To add additional product photos for your product click on the "Photos" button in the top navigation of the product setup screen.

The following is a screen shot of the product photo setup screen:

Product Photo Gallery Setup

Upload Photo #2: [   ] [Browse...]

Product Photo #2:

Upload Photo #3: [   ] [Browse...]

Product Photo #3:

Upload Photo #4: [   ] [Browse...]

Product Photo #4:

Figure 13 - Product Photo Upload Screen

The product upload for images Photo #5 and Photo #6 are not shown for space reasons. For more information about enabling zoom and lightbox effects on your product images click here.

XIII. Adding Product Zoom Images

Smith Cart comes with a built in feature that allows zooming on your product images and enables a small magnifier window next to the main product image on the product detail
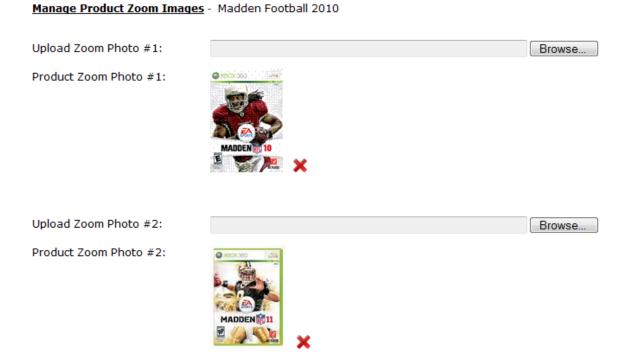
page. If you would like to enable the zoom effect on your product images and have enabled the zoom feature in the product details module described here then you will need to add zoom images as described as follows.

Click on the "Product Zoom Images" sub menu button in the top navigation of the product setup screen.

The following is a screen shot of the product zoom images setup screen:

The product upload for zoom images Photo #3-6 are not shown for space reasons. For more information about enabling the zoom effect on your product images click here.

XIV. Product Variant Management

Smith Cart allows for the assignment of an unlimited number of product variants. This gives you the ultimate flexibility when it comes to configuring product options with sizes, colors, weight, options, etc.

When you click the "Variants" button at the top of the product management screen the follow screen will be displayed.

Add New Product Variants - Halo 3 for Xbox 360

Sort Order:

Product Variant Group: -Select-   **Manage Variant Groups**

Product Variant Sku:

Product Variant Name:

Display Type:
- Dropdown List
- Radio Buttons
- CheckBox
- TextBox

Required:

Quantity On Hand:

Select Image To Upload: Browse...

Price Adjustment:

Weight Adjustment:

Conditional Variant Group: -Select-

Add New Product Variant   Clear

SortOrder	Variant Group	Sku	Variant Name	Display Type	Required	Qty On Hand	Variant Image	Price Adj	Weight Adj	Conditional Group	Select		
2	Size	7655	Small	RadioButtons	☑	8787		0.00	0	Design	☐	Edit	Delete
3	Size	121233	Medium	RadioButtons	☑	9888		0.00	0	Sleeves	☐	Edit	Delete
4	Size		Large	RadioButtons	☑		thumbs-up-down-icons.jpg	0.00	0		☐	Edit	Delete
6	Color	1234	Red	RadioButtons	☐	1212		0.00	0	Neck	☐	Edit	Delete
7	Color	2323	Blue	RadioButtons	☐	1212		0.00	0	Baggy	☐	Edit	Delete
8	Design	8787	Standard	DropdownList	☐	8787		0.00	0		☐	Edit	Delete
9	Design	878990	Custom	DropdownList	☐	2323		0.00	0		☐	Edit	Delete

Copy Product Variants

Copy product variants to: -Select-   Copy

Figure 14 - Product Variant Management Screen

A.   Adding new Product Variants

To add a product a new product variants simply start entering your product variant information into the text boxes and click the "Add New Product Variant" button to save.

Sort Order - The sort order field controls the order in which the product variants are displayed in the product catalog. Enter a numeric number from 1 to 999. The products variants will be sorted in ascending order by the sort order field.

Variant Group – The variant group is the "type" of product variant you are creating for a product. For example, size and color are examples of variant groups. The variant group field you define be will displayed as a label next to the product variant dropdown, radiobutton or checkbox on the product detail screen. For more information about create product variant groups click here.

Product Variant Sku - Enter your product variant sku in this field. The product variant sku is typically a unique number that identifies your product for inventory purposes.

Variant Name – The variant name is the actual product variants that is displayed in dropdown, radiobutton or checkbox where the user selects the product variants on the product detail page of the cart. For example, if you are selling shirts then small, medium and large are examples of variant names.

Display Type – The display type is the type of control the cart will use to display product variants. The options for product variant display type are:

- Dropdown lists
- Radio buttons
- Check boxes
- Text boxes

Click here for more information about styling product variants in the module.css

Required – When the "Required" checkbox is checked the user will be required to choose a product variant before adding a product to the cart.

Quantity on Hand – The quantity on hand field is used to manage your available inventory for your product variants. Enter the current available product variant quantity you have available in your inventory. Every time a user purchases a unit of product the quantity on hand is decremented by the number of units purchased.

Variant Image – Upload and associate an image with your product variant. This will allow the user to rotate through your product images when they change the product variant on the product detail page of the cart.

Price Adjustment – The price adjustment field allows for the adjustment of the product price based on the product variant the user selects. For example, the price of a shirt is 20 dollars and you enter the following price adjustments:

- Small - $0
- Medium - $5
- Large - $10

The net price of the shirt would be the following:

- Small - $20
- Medium - $25
- Large - $30

Variants defined as textboxes allow the user could enter a value into the textbox that can be used to calculate the total price of the product. For example, the price of fiber optic cable is $5/foot. If the user entered 100 into the textbox the price of the product would be calculated as follows:

Product Price + (Variant Price x Value entered by user)

Weight Adjustment - The weight adjustment field allows for the adjustment of the product weight based on the product variant the user selects. For example, if you have products that are different sizes and the large size weighs more you can enter a weight adjustment. The product weight is used in calculating the total shipping cost of the customer's order.

Conditional Group – The conditional variant group allows you to define a variant group to be dynamically displayed based on the selected value of a regular variant. To configure a conditional variant group navigate to the variant group setup screen and enter your variant group name and check the "Hide" checkbox. When a conditional group is configured for a variant with the hide checkbox checked, by default, it will not display on the product detail page until the value of the variant that it is conditional upon is selected.

1.   Conditional Variants – Product Configurator

There are many useful scenarios for conditional variants, one example is a product configurator similar to what most of us have used if you have ever bought a laptop or server online at Dell or CDW.

For example, if you are at the dell website and configuring a new server and you select the option for an IDE controller, the web page will dynamically display IDE hard drive options. If you choose a raid controller it will show you SCSI hard dirves. In this example you would define variants in the cart as follows:

Regular Variants - Hard Drive Controllers

Variant Group	Variant Name	Display Type	Conditional Group
Hard Drive Controller	IDE Controller	Radio Button List	IDE Hard Drives
Hard Drive Controller	RAID Controller	Radio Button List	RAID Hard Drives

Conditional Variants - IDE Hard Drives

Variant Group	Variant Name	Display Type	Conditional Group
IDE Hard Drives	320 GB IDE Hard Drive	Radio Button List	
IDE Hard Drives	500 GB IDE Hard Drive	Radio Button List	
IDE Hard Drives	750 GB IDE Hard Drive	Radio Button List	

Conditional Variants - SCSI Hard Drives

Variant Group	Variant Name	Display Type	Conditional Group
SCSI Hard Drives	720 GB IDE Hard Drive	Radio Button List	
SCSI Hard Drives	900 GB IDE Hard Drive	Radio Button List	
SCSI Hard Drives	1.2 GB IDE Hard Drive	Radio Button List	

2.   Conditional Variants – Example 2

An online window and door distributer is selling windows and doors online. Smith Cart conditional variants allow one variant to depend on the value of another which are mutually exclusive. For example, the variant group "Door Track Type" is defined as the type of track that a hanging door uses to install into a ceiling. There are three ways that these doors are connected into the ceiling. You can use either the standard track that comes with the door at no charge, buy a track that installs flush with the ceiling called a "Recessed track", or use "Curved Track" if the door closes around a bend. These three choices are mutually exclusive. If you use standard track, you can't have recessed track. If you have curved track, you can't have either recessed or standard. All three of these types of track have different prices based on the number of feet ordered. When you select one type from the variant drop down, the appropriate "conditional variant" opens up to allow the user to enter the number of feet of track of the type selected in the dropdown. The number of feet is then multiplied to by the price per foot and added to the base price.

Select – The select checkbox is used with the variant copy option. Check the boxes of the variants that you want to copy to another product.

Copy Product Variants – From the dropdown list select the product that you want to copy variants to. When you click the "Copy" button the program will copy all the product variants selected from the variant grid to the product chosen in the dropdown list.

Products Variants on the Product Listing Screen

When a product is assigned variants the "Add to Cart" button on the product listing screen automatically changes to "Select Options". When the user clicks the select options button they are taken to the product detail page where they can select product variants. The following is a screen shot of the product detail page where the user can select product variants.

Product detail screen with custom product variants:

If you have added product variant images, when the user changes the value of the product variant dropdown, radiobutton or checkbox the product picture will dynamically change.

B.   *Edit/Delete Product Variants*

Edit Product Variants

From the data grid that lists your product variants click the edit link next to the product variants you wish to edit. Make the changes to the product variants and click the update button to save your changes. Click the cancel button to cancel your changes.

Delete Product Variants

From the data grid that lists your product variants click the delete link next to the product variants you wish to delete.

C.   Product Variant Groups

To define variant groups click on the "Manage Variant Group" link on the variant setup screen.

When you click the "Manage Variant Groups" link the following screen is displayed:

Manage Product Variant Groups - Door

Group Name: [   ]

Group Help URL: [   ]

Hide: ☐

[Add Variant Group]

Group Name	Help URL	Hide		
Color		No	Edit	Delete
Driver's Name		No	Edit	Delete
Track Type		No	Edit	Delete
Recessed Hat Channel		Yes	Edit	Delete
Curve-able I Beam		Yes	Edit	Delete
Testbox		No	Edit	Delete
Sliding Jam Panel		No	Edit	Delete

Group Name (Required) – The group name is the "type" of variant you are creating for a product. For example, size and color are examples of variant groups. The variant group field you define be will displayed as a label next to the product variants dropdown, radiobutton or checkbox on the product detail screen.

Group Help URL (Optional) – Enter the full URL (including http://) to a help page on your site that provides variant help. When the group help URL is populated a link will be displayed next to the variant group on the product details page.

Hide (Optional) – Check the hide box to define a conditional variant group. By default conditional variants are hidden and only displayed conditionally based on the selected value of another variant.

D. Product Variant Inventory

Smith Cart allows you to configure product variant inventory on an unlimited number of product variant combinations. In order for the cart to manage your product variant inventory you need to check the "Enable Inventory Management" checkbox in the buynow module settings under the general cart setup section. When "Enable Inventory Management" is checked the cart will check for available quantity on hand, if quantity on hand for a product variant is less than the quantity the user has added to the cart, then the cart will display an "Out of Stock" message and not allow the user to proceed past the cart screen.

To load the Variant Inventory screen click the "Variant Inventory" sub menu button at the top of the product management screen:

When you click the "Variant Inventory" the following screen will be displayed.

Manage Product Variant Inventory - Madden Football 2010

To setup variant inventory check variant names, enter sku and quantity on hand and click the add variant button.

Group	Variant Name	Select
Size	Small	☐
Size	Medium	☐
Size	Large	☐
Color	Blue	☐
Color	Green	☐
Color	Red	☐

Product Variant Sku:

Quantity On Hand:

Clear   Add Variant Inventory

Variant Names	Sku	Qty On Hand		
Size=Small, Color=Blue	2345	2090	Edit	Delete
Size=Small, Color=Green	3435	1200	Edit	Delete
Size=Small, Color=Red	8745	1100	Edit	Delete
Size=Medium, Color=Blue	1238	1300	Edit	Delete

XV. Quantity Discounts

Smith Cart has a built-in quantity discounting mechanism (native quantity discounts), which allows you to discount bulk purchases of a single product or a category of products. The feature allows unlimited numbers of discount levels. Discounts must be individually configured on each product or at the category level. Discounts may be expressed in dollars or percentages. When you click the "Discounts" button in the product management screen the following screen is displayed:

Figure 15 – Product Quantity Discount Management

If quantity discounts are configured for a product the cart will automatically generate the discounts based on the quantity of items in the cart.

For more information about configuring Category Quantity Discounts click here.

XVI. Product Level Shipping

Smith Cart supports configuring shipping costs and methods at the product level. The following is a screen shot of the product level shipping setup screen:

Product Shipping Method Setup

Note: To use this option you must select Use Shipping Calculator in the Shipping Setup section in the cart settings.

Product Shipping Methods: 0

☐ Parcel Post
☐ Media Mail
☐ Priority Mail Flat Rate Envelope
☐ Priority Mail Small Flat Rate Box
☐ Priority Mail Regular Flat Rate Box
☐ Priority Mail Large Flat Rate Box
☐ Express Mail
☐ Priority Mail
☐ First Class

Product Shipping Cost – Enter the shipping cost you would like to charge for your product. When a shipping cost is entered for a product the cart will calculate the shipping cost based on the value entered for the product. If the user adds multiple products to their cart then the cart will sum the shipping cost for each product to determine the total shipping cost.

Product Shipping Methods - The shipping methods checked in the product setup screen above will control the shipping methods made available to customer in the cart screen at time of purchase. If multiple products are being purchased then cart will display ship methods available for all the products in the cart to be purchased.

Restrict Shipping By State - The cart provides the ability to prevent shipping to certain states by product. Please see the following screen to setup restricted ship states.

Restrict Shipping By State

Note: To use this option you must select one of the shipping options that displays shipping methods on the cart screen.

States:

| Alabama |
| Alaska |
| Arizona |
| Arkansas |
| California |
| Colorado |
| Connecticut |

>>
<<

Restricted States:

The list box on the left titled "States" contains a listing of all the states. The list box on the right titled "Restricted States" contains a list of the states you have selected as restricted states.

To create add restricted ship states for a product do the following:

1. Edit the product that you want to add restricted states to.
2. In the list box on the left, highlight the state you want to add to the restricted state list
4. Click the arrow button pointing to the right >>
5. Click the "Update" button and the bottom to save

When the user enters their ship to address on the cart screen and restricted states are enabled, and they choose a state to ship to that is restricted the cart will display a message "Product xyz cannot be shipped to the state you have selected" and not allow the user to proceed past the cart page until a valid state is selected.

XVII. Search Engine Optimization (SEO)

Smith Cart provides comprehensive search engine optimization (SEO) features to enable your store to achieve top search engine rankings in Google, Yahoo and Bing. In the product setup area you can configure the product URL, page names, title tag, description meta tag, keyword meta tags and product photo alt tags for each product in your catalog. These are important SEO features that enable search engines to crawl and index each page in your product catalog and ensures that each page in your product catalog has unique URL's, page names with important keywords and the proper meta tags.

From the product setup screen click the "SEO Tags" button

The following screen will be displayed:

URL Keywords – The keywords entered in this field will be dynamically added in the URL of the product detail page. If you have configured friendly URL's in your portal or are using the iFinity URL module then the value you enter in this field will be the page name when the user navigates to the product details page for the product. For example, if you have a product titled Halo4 and you enter "Halo4" as your product page name the product detail page URL would be the following:

yourdomain.com/halo4.aspx

Enter keywords that are relevant and targeted towards your product. Targeted keywords in the URL help your SEO rankings. If you enter several keywords use hyphens as dividers and not underscores as hyphens have proven better for SEO.

Note: The manage categories screen also has a field called "URL Keywords" that is used to build a unique URL on the product listing page. See the "Manage Categories" section below for more information.

Title Tag - The Title tag shows up in the top bar of the user's browser and is one of the most important things in good search engine positioning. Each page of your site should have a unique title tag with its own keywords that relate to the page. Title tag length should be between 50-80 characters long - including spaces. You should optimize for 1-2 of your most important product keyword phrases in the title tag.

Description Tag - The description meta tag is meant to describe what your page is about and must contain the popular search words from your keyword research. All of your product pages should have a unique description META tag and should include 3-4 of your most popular search words especially those used in your title tag and content. Try to have your most important keywords appear at the beginning of your description. Your description meta tag should not exceed 200 characters.

Keyword Tag - The keyword meta tag is not as important as it once was in search engine optimization but is still important for obtaining top search engine rankings. The keyword meta tag is should include the important keywords that relate to your products. Good meta keyword optimization include 3-4 of your most important keyword phrases, especially those used in your title tag and product description. Your keyword meta tag should not exceed 300 characters.

Product Photo Alt Tags 1-6 - Alternate text is meant to provide additional information or alternative description for your product images. The Alt Tag field allows a maximum of 150 characters but it is recommended that you limit your alt tags to 80 characters. The alt tags should be unique for each product photo and make sure you enter relevant and appropriate keywords that describe the picture. It is also good SEO practice to embed important keywords in your image names before you upload them in the product setups screen.

After you are done entering your SEO Meta Tags click the "Save" button to save your changes.

XVIII.   Related Products and Up Selling

The related products feature gives you the ability to cross-sell, up-sell or recommend additional products to customers. From the product setup screen click the "Related Products" button on the top menu

The following screen is displayed:

Figure 16 - Manage Related Products Screen

The list box on the left titled "Master Product List" contains a listing of all products currently setup in your store. The list box on the right titled "Related Products" contains a listing of the products you have selected as related products.

To create add related product do the following:

1. Edit the product that you want to add a related product to.
2. In the list box on the left, highlight the product you want to add as a related product
4. Click the arrow button pointing to the right >>
5. Click the "Update" button and the bottom to save

If you have setup related products they will be displayed in a tab titled "Related Products" on the product detail page as follows:

XIX. Product Level Member Pricing

Smith Cart provides the ability for you to offer multi-tiered pricing to members, wholesalers, resellers and distributors. Suppliers typically offer these customers better pricing because they purchase larger quantities of products and are long-term customers. Smith Cart supports adding up to two levels of member pricing based on the logged in users DNN role. This will allow you to create an ecommerce site with an unlimited multi tier pricing scheme by product.

To add member pricing for your product click on the "Member Pricing" button in the top navigation of the product setup screen.

The following is a screen shot of the Member Pricing management screen:

Figure 17 - Product Member Pricing Screen

Member Price Label 1 – Member price label 1 is the label that shows up next to member price 1 on the product listing and product detail pages.

Member Price 1 – Member price 1 is the member price that shows up on the product listing and product detail pages when the user is logged in and is a member of the role that has been assigned to this member price level.

Member Price Label 2 – Member price label 2 is the label that shows up next to member price 2 on the product listing and product detail pages.

Member Price 2 – Member price 2 is the member price that shows up on the product listing and product detail pages when the user is logged in and is a member of the role that has been assigned to this member price level. If second level member pricing is defined for a product then the user will be presented with a radio button option on the product details page to choose either member price 1 or member price 2.

Member Role – Dropdown list of all the current roles available in your portal. Choose a role from the dropdown list that you want to assign to the pricing tier being defined.

When a user is logged in and they are part of a DNN role that has been assigned member pricing the product listing page and product detail page will show the member pricing defined for the appropriate role.

In order to activate member pricing by discounts in your store the "Member Pricing By Role" radio button option must be selected in the BuyNow module settings member pricing and discounts section.

XX. Product Variant Matrix

Smith Cart supports building and displaying a cross-matrix of product variants. For example, a parts manufacturer could display a matrix of products with different size and length variations.

A.   Building a Product Matrix

To add a matrix for a product click on the "Matrix" button in the top navigation of the product setup screen.

The first screen that is loaded is the "Manage Matrix Header" page. The following is a screen shot of the Manage Matrix Header screen:

Figure 18 - Manage Matrix Header Screen

Enter one or two rows of titles for the product variant matrix. After entering the matrix title information click the "Add Product Matrix Header" button to save.

Y Outer Label/X Outer Label – Defines a label that is display outside the matrix to define the X and Y axis values. For example, If you are building a parts matrix and the Y Outer Label defines the size of your part and the X Outer Label defines the length of your part you would enter "Size" as the Y Outer Label and Length as the X Outer Label.

X Axis Title 1-10 – Defines the first row titles of your matrix.

Manage Matrix Items
Before you build the detail of your matrix you will first need to define the product variant items. Click the "Manage Matrix Items" button at the top of the page to load the manage matrix items screen.

The following is a screen shot of the Manage Matrix Items screen:

Figure 19 - Manage Matrix Items Screen

Enter all your unique product variants you want to show up in the matrix. After entering the matrix item information click the "Add Matrix Item" button to save.

Sku – Enter your product sku or model number in this field. The product sku is typically a unique number that identifies your product for inventory purposes.

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Quantity on Hand – The quantity on hand field is used to manage your available inventory for your product. Enter the current available product variant quantity you have available in your inventory.

Price – The price is the cost you want to charge for your product variant item. Enter your product variant price here.

Manage Matrix Detail

The last step is to build the detail cells and rows of your matrix. Click the "Manage Matrix Detail" button at the top of the page to load the manage matrix detail screen.

The following is a screen shot of the Manage Matrix Detail screen:

Figure 20 - Manage Matrix Detail screen

The manage matrix detail screen above allows you to add, edit and delete product rows in the matrix.

Y Axis Title - Defines the left most title column of the matrix.

Sku 1-9 – Define individual cells of the matrix. When in add or edit mode the sku is a dropdown list where you can select the items that you defined in the "Manage Matrix Items" section above. .

After you are finished creating your product variant matrix click navigate to the product details page for the product and you will notice a new tab titled "Matrix" in the tab control where the product description is displayed.

The following is a screen shot of the matrix on the Product Details page in the front end of the cart:

Figure 21 - Matrix on the Product Details page

The matrix supports two x axis titles and one y axis title, ten product matrix columns and unlimited product variant matrix rows. When a user clicks on the "Add to Cart" button for a variant cell in the matrix the item they clicked on will be added to the cart.

XXI. Search Term Management

Smith Cart provides the ability to enter additional product search keys that are searchable from the product listing page search box. This is useful if you would like to have products searchable on words that do not show up in the product name, sku, summary or description or they can be used for product associations or common misspellings.

To enter additional search terms for your product click on the "Search Terms" sub menu under the "Products" menu item in the top navigation of the product setup screen.

The following is a screen shot of the Search Term management screen:
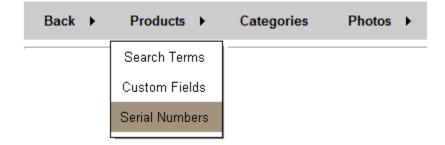
Enter a comma separated list of search terms in the text box provided.

Smith Cart is also integrated with the DNN iSearchable interface so all your products are indexed and searchable using the regular DNN search facility.

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XXII. Serial Number Management

Smith Cart allows you to track and manage an unlimited number of product serial numbers from the time they are received into inventory until the time they are issued. This information is permanently recorded in the database, allowing inventory control personnel access to a wealth of historical and validation information. The information maintained is helpful when returning a defective item to your vendor or when verifying an RMA or returned item from your customer.

To import and add serial numbers for your product click on the "Serial Number" sub menu under the "Products" menu item in the top navigation of the product setup screen.

The following is a screen shot of the Serial Number management screen:

Figure 22 - Serial Number Management

A.   *Importing Serial Numbers*

The import serial numbers function allows you to import serial numbers from a CSV file.

The field specification for the csv is just a single column of serial numbers. The following is an example of a serial number csv file:

1QCSUCTB82OMVJH
ZUM7SGA2PWS12DC
XTF76Z5G1RQW3HC
7AEQWPK5PXMMS5E
VK3YJF20RVDI8TN
SUELS613BWUSWGE
X5M96I1LQZTK9J4
3QKPC56DOQ7LCYS

OTYW9RABOR71WVX

Step1: Click the browse button and choose the CSV file to upload.

Step2: Click the button titled "Import Serial Numbers"

After you have imported the serial numbers they will automatically be displayed in the product serial number data grid.

B.   Serial Number Assignment

When a successful order is placed for a product with serial numbers associated with it the cart will automatically assign a serial number to the order and save the order number to the "ProductSerialNumbers" table and save the serial number in the order_detail table.

Note: A serial number will only be assigned to an order if an unassigned serial number exists for the product.

After a successful order is placed the serial number will be displayed in the following areas of the cart:

- Confirmation screen after order is successfully placed
- Email confirmation sent to user and admin
- Manage orders screen in cart admin area

If multiple quantities of a product are purchased the cart will assign multiple serial numbers to the order.

XXIII.   Coupon Management

To add or edit coupons click the button titled "Manage Coupons" from the Store Admin Menu.

Manage Coupons

The following screen will be displayed when you choose Manage Coupons.

A.   Add New Coupon

Click the "Add New Coupon" button to add a new coupon and the following screen will be displayed.

Coupon Management

Coupon Code: 1234

Coupon Name: 10 dolllars off

Coupon Amount: 10.00

Discount Percentage: 0   *Enter number without % sign (i.e. 20% is entered as 20)*

Expiration Date: 09/03/2010

Order Level Discounts

Discount by Item in kit: ☐

Coupon Quantity:

Product Level Discounts

Product: -Select-

Coupon Limit:

Shipping Amount: -1

(Enter -1 for no coupon shipping amount)

[<< Back]   [Update]

Coupon Code – The coupon code is an alphanumeric value that the user enters in the cart to apply the discount.

Coupon Name – The coupon name is a unique name that you assign to the coupon to help you reference the sale or promotion you are offering discounts for. The coupon name does not show up in the front end cart to the user. The coupon name is only used for backend reporting.

Coupon Amount – The coupon amount is the total dollar amount you want to discount the order by when the user enters a valid coupon code. It should be entered as a numeric amount without the dollar sign.

Discount Percentage – The discount percentage is the percent that you want to discount the order by when the user enters a valid coupon code. It should be entered as a number without decimals or percentage sign. For example, 10% should be entered as 10 and 25% should be entered as 25.

Make sure you enter a coupon amount OR a discount percentage not both.

Expiration Date – Enter the date you want the coupon to expire. Leave blank for no expiration date.

Order Level Discount Section

The fields in this section apply to all the items in the cart or at the order level.

Discount by Item in Kit – The discount by item checkbox allows you to apply the coupon at the order level or the order line item level. If the discount by item checkbox is checked and the user enters a valid coupon then the customer will receive a discount for each line item they have in the cart. For example, if the customer has two items in their cart and they enter a valid coupon for 5 dollars off then they will receive a total discount of 10 dollars. If the discount by item checkbox is not checked the customer would only receive a 5 dollar discount.

Coupon Quantity – The coupon quantity allows you to place a limit on the total number of coupons allowed per order per customer. For example,

1. You setup a 5 dollar off coupon code "1234" in the manage coupons screen.
2. You have entered a "coupon quantity" of "5" for this coupon.
3. The user orders a quantity of 6 for this item
4. The discount will be $25 for this item

Product Level Discount Section

The fields in this section apply to discounts at the product level.

Product – Dropdown allowing you to choose the product a coupon applies to. The product dropdown will display list of all active products. From the product dropdown choose the product that you want the coupon to apply to.

Coupon Limit – Limits the number of times a customer can use the coupon. If a "1" is entered then the cart will only allow one coupon per customer (dnn user). The user must be logged in when purchasing to enforce this rule.

Coupon Shipping Amount - Enter a dollar amount to charge for shipping and handling that will apply to the product when a user enters a valid coupon in the cart. The coupon shipping amount will override the normal shipping cost for the product. If multiple items are in the cart the coupon shipping amount will only apply to the selected product coupon. Other items in the cart will be charged the normal shipping amount. If zero is entered in the coupon shipping amount field then the free shipping will be given when a valid coupon is entered.

Please Note - Coupons are applied before shipping amount, handling amount and tax.

B.   Edit and Delete Coupons

Edit Coupons

From the data grid that lists your coupons click the edit link next to the coupon you wish to edit. Make the changes to the coupon and click the update button to save your changes. Click the cancel button to cancel your changes.

Delete Coupons

From the data grid that lists your coupons click the delete link next to the coupon you wish to delete.

Congratulations! Your new Shopping Cart is now ready for use. Make sure that you logout as host before going thru the checkout.

XXIV.   Discounts

To order level discounts or price class discounts click the button titled "Discounts" from the Store Admin Menu.

A.   Order Level Discounts

To enable order level discounts navigate to the BuyNow module settings under the section titled "Discounts" and select the option titled "Enable Order Level Discounts".

The following screen will be displayed when you click the Discounts button.

Manage Order Level Discounts

*Note: Product level quantity discounts and product member pricing are managed in the product setup screen.
Category level discounts are managed in the category setup screen.*

Member Role: -Select-

Discount Percentage:

Enter percentage without % sign (i.e. 20% is entered as 20)

Discount Amount:

Textbox 1 Required: ☐

Textbox 2 Required: ☐

Date Field Required: ☐

Add Order Discount

Member Role	Discount Percent	Discount Amount	Textbox 1 Required	Textbox 2 Required	Date Required		
Software Sub 1	20.00	0.00	Yes	Yes	No	Edit	Delete
Software Sub 2	0.00	10.00	Yes	Yes	Yes	Edit	Delete

Member Role – Dropdown list of all the current roles available in your portal. Choose a role from the dropdown list that you want to assign an order level discount to.

When a user is logged in and they are a member of the DNN role that has been assigned an order level discount a new row in the subtotal will be displayed showing the discount amount. Order level discounts are applied to the order subtotal before shipping and tax are added.

Discount Amount – The discount amount is the total dollar amount you want to discount the order by when the user is logged in and a member of the role you define. It should be entered as a numeric amount without the dollar sign.

Discount Percentage – The discount percentage is the percent that you want to discount the order by when the user is logged in and a member of the role you define. It should be entered as a number without decimals or percentage sign. For example, 10% should be entered as 10 and 25% should be entered as 25.

Make sure you enter a coupon amount OR a discount percentage not both.

Textbox 1 Required, Textbox 2 Required and Date Required – These three fields are optional. Check the boxes for these fields to make them required fields for the user to enter when you require the user to register before being able to add a product to their cart. The "Add To Cart Requires Login" is in the cart admin settings under the "General Cart Setup" section. The use of these fields is described in more detail under the Registration Page section below.

B.   Edit and Delete Order Level Discounts

Edit Order Level Discounts

From the data grid that lists the order level discounts click the edit link next to the row you wish to edit. Make the changes to the record and click the update button to save your changes. Click the cancel button to cancel your changes.

Delete Order Level Discounts

From the data grid that lists your order level discounts click the delete link next to the record you wish to delete.

C.   Price Class Discounts

Price Class Discounts allow for mix and match pricing in the cart by enabling a new "Price Class" field that will allow you to group products by price class and calculate quantity discounts by price class.

To load the price class setup screen click the "Price Class Discounts" button at the top of the discount setup screen:

When you click the "Price Class Discounts" button the following screen will be displayed:

![smithcart logo]

Manage Product Price Class

Price Class Name:	
Quantity From:	
Quantity To:	
Price:	

Add Price Class

Price Class Name	Quantity From	Quantity To	Product Price		
Class1	5	10	20.00	Edit	Delete
Class1	11	20	15.00	Edit	Delete
Class1	21	30	10.00	Edit	Delete
Class 2	5	10	45.00	Edit	Delete
Class 2	11	20	35.00	Edit	Delete
Class 2	21	30	25.00	Edit	Delete

Figure 23 - Price Class Setup Screen

Please Note: To enable price class discounts navigate to the buynow module settings under the section titled "Discounts" and select the option titled "Enable Price Class Discounts". Additionally you will need to select the price class in the product setup screen for the product you want to discount.

XXV.   Configuring Shipping Options

Smith Cart provides a number of different ways to configure shipping in your store:

- Shipping Calculator - Real Time Shipping Rates (UPS, USPS, FedEx, Canada Post). For more information on configuring the shipping calculator in the BuyNow module settings click here.
- Zone Shipping by Quantity
- Zone Shipping by Weight

- Custom ship methods with fixed amounts (e.g. Ground, Next Day, 2nd Day, Priority, Pick Up, etc)
- Custom ship methods by Order Amount
- Custom ship methods by Order Quantity
- Custom ship methods by Order Weight
- Custom ship methods by Zip Code/Postal Code
- Shipping by Order Amount
- Product Level Ship Costs - For more information on configuring shipping costs by product click here
- Free Shipping and Free shipping over a certain order amount. For more information click here.
- Restricting certain states your company does not ship to – For more information click here

To manage custom shipping options click the button titled "Shipping" on the Store Admin Menu.

A. Custom Shipping Methods and Costs

The Manage Custom Shipping Methods screen is the default page loaded when you click the "Shipping" button from the store admin menu. See the following screen shot:

Sort Order - The sort order field controls the order in which the ship methods are displayed in the shipping method dropdown on the cart page. Enter a numeric number from 1 to 999. The shipping methods will be sorted in ascending order by the sort order field.

Ship Method Name – Custom shipping method available in the shopping cart (i.e. ground, next day, will call, pickup)

Ship Method Amount – Amount to charge for the shipping method defined. Enter a number value without the dollar sign.

Please Note: In order to enable custom shipping methods to display on the cart screen you must select the option titled "Custom Ship Methods with Fixed Amounts" in the cart settings described in the "Shipping Setup" section above.

B.   Shipping Zones

Shipping Zone Management allows you to define shipping zones as follows:

- By Country
- By Country and/or State/Region
- By Home Country and all other Countries (International)

To manage shipping zones click the button titled "Zones" at the top of the screen and the following screen will be displayed:

| Custom Methods | Zones | Category Map | By Weight | By Quantity | By Order Amount | By Zip Code |

Manage Shipping Zones

Zone Name: [   ]

Country: [--All Countries-- ▾]

State/Region: [   ]

Zone Amount: [   ]

[Add Zone]

Zone ID	Zone Name	Country	State/Region	Zone Ship Cost		
7	US - Alaska	US	AK	12.50	Edit	Delete
8	US - Hawaii	US	HI	12.50	Edit	Delete
9	US All	US	ALL	8.00	Edit	Delete
10	Canada All	CA	ALL	15.00	Edit	Delete
11	All other Intl	ALL	AL	15.00	Edit	Delete

Zone Name – The zone name is a friendly name that you choose that describes the zone defined.

Country – Select the country from the dropdown list for your zone. Select "ALL" for the zone to apply to all countries.

State/Region – Select the state/region from the dropdown list for your zone. Select "ALL" for the zone to apply to all states and regions. If you select a country other than United States and Canada this will be a textbox for you to enter the region for your zone.

Zone Ship Cost – Amount to charge for shipping for the zone. Enter a number value without the dollar sign.

C.   Category Map

The Category Map screen provides the ability to group shipping costs by product category. To manage Category Mappings click the button titled "Category Map" from the top menu and the following screen will be displayed:

Click the desired categories you would like to define shipping on and click the save button. All categories selected will be displayed as options in the category dropdown list when defining shipping by weight, shipping by quantity and shipping by zip code.

D.   Shipping By Weight

Shipping by weight allows you to configure the cart to charge shipping in the following ways:

- Fixed shipping costs by the total weight of the items in the cart.

- Fixed shipping costs by zone and total weight of the items in the cart.
- Fixed shipping costs by shipping method and total weight of the items in the cart.
- Fixed shipping costs by product category and total weight of the items in the cart.

To manage shipping by order weight click the button titled "By Weight" at the top of the screen and the following screen will be displayed:

Zone (Optional) – Select the zone name that you defined in the zone management screen above.

Product Category (Optional) - Select the category you defined in the category map screen above.

Ship Method (Optional) – To configure shipping costs by shipping method based on the total cart weight select the shipping method from the dropdown box. To add new shipping methods click the link titled "Manage Shipping Methods".

Order Weight From - Enter the "Order Weight From" which defines the bottom of the cart weight range used to calculate the shipping cost.

Order Weight To – Enter the "Order Weight To" which defines the top of the cart weight range used to calculate the shipping cost.

Shipping Cost – Amount to charge for the shipping for the weight range entered. Enter a number value without the dollar sign.

A. Shipping By Order Quantity

Shipping by order quantity allows you to configure the cart to charge shipping in the following ways:

- Fixed shipping costs by the total order quantity
- Fixed shipping costs by zone and total order quantity of items in the cart.
- Fixed shipping costs by shipping method and total quantity of items in the cart.
- Fixed shipping costs by product category and total quantity of items in the cart.

To manage shipping by order quantity click the button titled "By Quantity" at the top of the screen and the following screen will be displayed:

Zone (Optional) – Select the zone name that you defined in the zone management screen above.

Zone (Optional) – Select the zone name that you defined in the zone management screen above.

Product Category (Optional) - Select the category you defined in the category map screen above.

Ship Method (Optional) – To configure shipping costs by shipping method based on the total quantity of items in the cart select the shipping method from the dropdown box. To add new shipping methods click the link titled "Manage Shipping Methods".

Order Quantity From - Enter the "Order Quantity From" which defines the bottom of the order quantity range the cart uses to calculate shipping for the order.

Order Quantity To – Enter the "Order Quantity To" which defines the top of the order quantity range the cart uses to calculate shipping for the order.

Shipping Cost – Amount to charge for the shipping for the order amount range entered. Enter a number value without the dollar sign.

shipping methods click the link titled "Manage Shipping Methods".   If you want to configure a fixed shipping cost by the total order amount only select "No Ship Method".

Order Amount From - Enter the "Order Amount From" which defines the bottom of the order amount range the cart uses to calculate shipping for the order.

Order Amount To – Enter the "Order Amount To" which defines the top of the order amount range the cart uses to calculate shipping for the order.

Shipping Cost – Amount to charge for the shipping for the order amount range entered. Enter a number value without the dollar sign.

C.   Shipping By Zip Code/Postal Code

Shipping by zip code/postal code allows you to configure shipping costs in the following ways:

- Fixed shipping costs by country and "ship to" zip code/postal code.
- Fixed shipping costs by shipping method, country and "ship to" zip code/postal code.
- Fixed shipping costs by product category, country and "ship to" zip code/postal code.

To manage shipping by zip code click the button titled "By Zip Code" from the top menu and the following screen will be displayed:

Product Category (Optional) - Select the category you defined in the category map screen above.

Ship Method (Optional) – To configure shipping costs by shipping method based on zip code/postal code select the shipping method from the dropdown box. To add new shipping methods click the link titled "Manage Shipping Methods".

Zip Code/Postal Code – Enter the zip code/postal code to charge shipping on.

Country – Select the country to charge shipping on.

Shipping Cost – Amount to charge for the shipping for the zip code/postal code entered.

How it works - When the cart is configured for shipping by zip code and the user is on the cart screen, the user will be prompted to enter their ship to address and click the "calculate" button. The cart will look up the shipping cost based on the "ship to" zip code/postal code in the shipping by zip table. If the cart finds a zip code/postal code and country match then the respective shipping cost will be charged. If the cart does not find a match then a message will be displayed to the user requesting a valid zip code/postal code be entered before proceeding through checkout.

XXVI.   Automatic Credit Card Settlement

By default, credit card authorization and settlement happens automatically when a new order is placed. If you want automatic settlement for your shopping cart orders you do not need to do anything.

XXVII.   Manual Credit Card Settlement

Authorization and settlement can be configured as a two step process through the shopping cart module.   To setup the cart for manual settlement go to your payment gateway settings, under the payment method setup section and check the checkbox titled "Authorization Only"

A.   Step 1 – Credit Card Authorization

When your customer successfully checks out and purchases a product, the shopping cart will send an "Auth Only" transaction to the payment gateway. The Auth Only transaction will verify that your customer has funds on their credit card and it reserves funds for purchase reducing the available balance on the credit card.   Additionally, when your customer successfully checks out and purchases a product from the shopping cart, the module sets the status of the order to an "Open" status.

B.   Step 2 – Credit Card Capture and Settlement

After you have physically shipped your product, then you will need to go into the "Manage Orders" screen and settle the credit card transaction for the order.

XXVIII.   Manage Orders Screen

To view or edit your orders click the "Manage Orders" button on the Store Admin Menu.

Manage Orders

The following screen will be displayed:

Manage Customer Orders

From Date: [   ] [31]   To Date: [   ] [31]   [Filter]   [Show All]

< Prev Next >

Filter		Order ID	Order Date	Order Status -Select-	First Name	Last Name	Address	City	State	Country	Zip	Primary Phone
Select	Delete	384	4/4/2010 12:49:04 AM	Open	dave	smith	20 kendall	laguna	CA	US	92677	222-222-2222
Select	Delete	383	4/3/2010 11:06:08 PM	Open	dave	smith	20 kendall	laguna	CA	US	92677	222-222-2222
Select	Delete	382	4/3/2010 11:01:12 PM	Open	dave	smith	20 kendall	laguna	CA	US	92677	222-222-2222
Select	Delete	381	4/3/2010 10:39:58 PM	Open	dave	smith	20 kendall	laguna	CA	US	92677	222-222-2222
Select	Delete	380	4/3/2010 10:13:58 PM	Open	dave	smith	20 kendall	laguna	CA	US	92677	222-222-2222

The manage orders screen displays a grid view listing of your orders for quick viewing and by default is sorted showing newest orders first.

Sorting the Order Grid
Each column heading in the grid is a hyperlink, if you click the column heading in the grid it will sort on the field heading clicked in ascending order, if you click the column heading again the grid will sort in descending order on the field heading clicked.

Filtering Orders by Date Range

From Date: [   ] [31]   To Date: [   ] [31]   [Filter]   [Show All]

To filter the orders by date range just click on the calendar icons for "From Date" and "To Date" and choose the date range you want and then click the filter button and the order grid will filter all the order by date range on the order date field. To remove the filter click the "Show All" button and all the orders will be displayed again.

Filtering Orders using custom criteria

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In the header of the order grid are textboxes and dropdown lists that allow you to filter the grid by order id, order status, first name, last name and payment status.

Simply enter the value in the textbox or select the item from the dropdown list you want to filter on and click to the filter button and the order grid will filter on the criteria you entered. To remove the filter and show all orders click the "Show All" button.

XXIX.   Viewing Order Details and Payment History

Click the "Select" button to the left of the order to view the order detail and payment history of the order you want to view.

Figure 24 - Manage Orders - Order Detail Screen

All the fields in the Order Detail screen above are available to edit, enter the new value for the field you wish to edit and click the "Save" button to save your changes.

A.   Resending the Order Confirmation Email

The "Send Order Email" button on the order detail screen allows you resend the order confirmation emails out for the order. Simply click the "Send Order Email" button and the order confirmation email to the customer, the store admin and the "CC" email will be resent. For more information about customizing the confirmation email click here.

B.   Ship Confirmation Email

After your order has shipped open the manage order detail screen and update the ship tracking number and the ship date for the order and click save. The "Send Ship Email" button on the order detail screen allows you send a ship confirmation email out to the customer notifying them their order has shipped along with their tracking number and the ship date. Simply click the "Send Ship Email" button and the ship confirmation email will be sent to the customer. For more information about configuring the ship confirmation email tokens click here.

C.   Settle Credit Card

The "Settle Credit Card" button on the order detail screen allows you send a settlement request to the Authorize.Net payment gateway.   Simply click the "Settle Credit Card" button and the settlement request will be sent to the Authorize.Net payment gateway.

Note: You should only use the "Settle Credit Card" button if you are using the Authorize.Net payment gateway and have checked the box titled "Authorize Only" in the cart admin settings.

Note: Most ecommerce sites are set up for automatic credit card settlement so you will not have to worry about manually settling (capturing) the credit card authorization.

Authorize Only checked
When "Authorize Only" is checked in the cart admin settings all successful orders in the cart are sent to Authorize.Net with an "Auth Only" flag. After the order has been shipped you should return to the manage orders screen and change the status of the order to "Shipped" and enter the tracking number and then click the "Settle Credit Button" to

send a settlement request to the payment gateway. Settling the credit card transaction initiates the deposit of money to your bank account.

Authorize Only not checked (Default)
When "Authorize Only" is not checked in the cart admin settings all successful orders in the cart are sent to payment gateway with an "Auth + Settle" flag indicating auto settlement. Auto settlement is the most common way to setup your credit card processing because it requires the least amount of maintenance.

Note: Depending on if you meet the cutoff time for your credit card processor your funds will be deposited within 24 hours.

The reason you might want to setup credit card processing for "Authorize Only" is because some states require that you physically ship product before settling a credit card transaction.

D.   Viewing and Printing the Order Invoice

Click the "Invoice" button at the bottom of the order details screen to view the order invoice. Click the print button at the bottom of the invoice to print it.

smithcart

Invoice

Order ID: 420
Order Date: 04/08/2010 10:54 PM

Shipping Information:

dave smith
20 kendall
laguna , CA 92677
US
222-222-2222
dave@ddd.com

Billing Information:

dave smith
20 kendall
laguna , CA 92677
US

Payment Type: Credit Card

Shipping Method: Free

Product Name	Quantity	Price
Halo 3 Xbox 360 Video Game	1	$69.99

SubTotal:	$69.99
Shipping:	$0.00
Handling:	$0.00
Tax:	$7.00
Order Total:	$76.99

[Back]   [Print]

XXX.   Email Confirmation Invoice Receipt

After a successful order in your online store two email confirmations are sent out automatically. The first email confirmation is sent to the customer who placed the order. The second email confirmation is sent to the portal admin.

The following is a copy of the email confirmation invoice receipt that is sent to the customer and portal admin. You can insert a custom header that will appear at the top of the invoice. You can also custom the subject for the email confirmation. The custom header and subject are configured in the email section of the module settings. Refer to section III module settings for instructions.

The following is a sample email confirmation receipt that is automatically sent when an order is placed:

Order ID: 420
Order Date: 04/08/2010 10:54 PM

Shipping Information:

dave smith
20 kendall
laguna , CA 92677
US
222-222-2222
dave@ddd.com

Billing Information:

dave smith
20 kendall
laguna , CA 92677
US

Payment Type: Credit Card

Shipping Method: Free

Product Name	Quantity	Price
Halo 3 Xbox 360 Video Game	1	$69.99

SubTotal:	$69.99
Shipping:	$0.00
Handling:	$0.00
Tax:	$7.00
Order Total:	$76.99

XXXI.   Ship Orders

To view your customer's and shipping order information click the "Ship Orders" button on the Store Admin Menu.

Ship Orders

The ship orders screen will be used by shippers to fulfill orders contains the following information:

- Customer and shipping order information (view only)

- Order Detail Information including product sku, product name and quantity
- Print Picking List button
- Send Ship Confirmation button

The following fields will have edit capability:

- Ship Date
- Tracking Number
- Order Status (only Open & Shipped)

The Ship Orders button/screen will be securable using a new DNN role titled "SCShipOrders" and will leverage the existing store admin menu security mechanism for granting/denying access to store admin buttons. This allows you to give shippers/warehouse access to ship orders screen but no access to other buttons on the admin menu.

XXXII. Manage Customers

To view your customers click the "Manage Customers" button on the Store Admin Menu.

The following is a screen snippet of the manage customers screen. The actual manage customers page is to wide to display here but all the fields that are saved to the customer table are displayed on this screen.

Figure 25 - Manage Customers

The manage customers screen displays a grid view listing of your customers for quick viewing and by default is sorted by last name, first name.

Sorting the Customer Grid
Each column heading in the grid is a hyperlink, if you click the column heading in the grid it will sort on the field heading clicked in ascending order, if you click the column heading again the grid will sort in descending order on the field heading clicked.

Filtering Customers using custom criteria
In the header of the customer grid are textboxes that allow you to filter the grid by name, city, state, zip, country, etc.

Simply enter the value you want to search on in the textbox and click the filter button and the customer grid will filter on the criteria you entered. To remove the filter and show all customers click the "Show All" button.

Selecting a Customer
When you click the "Select" button next to a customer the manage orders screen will be displayed showing all the orders for the customer selected.

XXXIII.   Manage Payment History

To view your payment history click the "Payment History" button on the Store Admin Menu.

The following is a screen snippet of the manage payment history screen. The actual manage payment history page is too wide to display here but all the fields that are saved to the payment history table are displayed on this screen.

Manage Payment History

From Date: [_____] 📅   To Date: [_____] 📅   [Filter]   [Show All]

< Prev **Next >**

[Filter]	**Billing Name** [____]	**PayType** [____]	**PayDate** [____]	**Amount** [____]	**AcctNo** [____]	**Billing Address**	**BillingCity** [____]	**BillingState** [____]
[Select]	dave smith	CreditCard	4/4/2010 12:49:04 AM	$74.25	4012888888881881	20 kendall	laguna	CA
[Select]	dave smith	CreditCard	4/3/2010 11:05:46 PM	$74.25	4012888888881881	20 kendall	laguna	CA
[Select]	dave smith	CreditCard	4/3/2010 11:01:12 PM	$74.25	4012888888881881	20 kendall	laguna	DE
[Select]	dave smith	CreditCard	4/3/2010 10:39:58 PM	$74.25	4012888888881881	20 kendall	laguna	CA

The manage payment history screen displays a grid view listing of your payment history for quick viewing and by default is sorted in descending order by payment date showing newest payments first.

Sorting the Payment History Grid
Each column heading in the grid is a hyperlink, if you click the column heading in the grid it will sort on the field heading clicked in ascending order, if you click the column heading again the grid will sort in descending order on the field heading clicked.

Filtering Payment History by Date Range

From Date: [_____] 📅   To Date: [_____] 📅   [Filter]   [Show All]

To filter the payment history by date range just click on the calendar icons for "From Date" and "To Date" and choose the date range you want and then click the filter button and the payment history grid will filter all the payment history records by date range on the payment date field. To remove the filter click the "Show All" button and all the payment history records will be displayed again.

Filtering Payment History using custom criteria

In the header of the payment history grid are textboxes and dropdown lists that allow you to filter the grid by simply enter the value in the textbox or select the item from the dropdown list you want to filter on and click to the filter button and the payment history grid will filter on the criteria you entered. To remove the filter and show all orders click the "Show All" button.

XXXIV.   Wish List / Save Cart Feature

Smith Cart has a built in Wish List / Save Cart feature that enables a logged in user to save items in their cart and return later to view and retrieve their saved cart for purchase. When "Enable Wish List/Saved Cart" is checked in the cart settings the "Save Cart" and "View Saved Cart" buttons will be displayed on the cart screen as follows:

Checkout			
CONTINUE SHOPPING		SAVE CART VIEW SAVED CART	CHECKOUT

Product Name	Unit Cost	Quantity	
Guitar Hero 3	$110.00	1	✖

UPDATE QUANTITY

Sub Total : $110.00
Shipping Fee : TBD
Handling Charge : $0.00
Sales Tax 6.25% : $6.88
Surcharge : $22.00
Total : $138.88

Figure 26 - Cart Screen

User not logged in - If the user clicks "Save Cart" or "View Saved Cart" and they are not logged then they will be taken the login screen to login. After the user has successfully logged in they will then be taken to the save cart screen

User already is logged in - If a user is logged in and clicks "View Saved Cart" they will be taken to the save cart screen listing of all their saved carts and associated products.

If a user is logged in and clicks the "Save Cart" button the contents of the cart are saved to the Smith_SavedCart table and associated with the logged in users profile. The following screen is displayed when the user clicks the save cart button:

The save cart screen lists the contents of the users saved carts with select, edit, delete and move to cart buttons.

Select Button – When the user clicks the select button the contents of the saved cart are displayed.

Edit Button – When the user clicks the edit button next to one of their saved carts they are able to edit and save the description of their saved cart with a user friendly name so it is easy for them to recognize when they return later to purchase.

Print Button – Provides the ability for a registered user to print out the contents of their saved cart in a printable invoice or quote format that lists items on a line by line basis with all selected attributes. The invoice/quote is generated in an html page with a print button where the user can then print. The invoice/quote header contains the saved cart ID, saved cart description and user ID. The invoice/quote detail area contains every item in the cart listed line by line. Each line item shows the product sku, description and any linked attributes, plus quantities, custom label and price. The bottom of the invoice/quote displays subtotal, sales tax and total price as well as standard terms and conditions.

Share Button – Provides the ability for a registered user to "Share" a saved cart or wish list with another registered user or new user. This allows user A to add items to a cart and save it. User A can then invite user B to login/create an account and access user A's saved cart and retrieve that cart for editing or continue to checkout.

When user A clicks the "Share button", a textbox is displayed prompting the user to enter an email address and click send. See figure 27 below.

Figure 27 - Share Cart Feature

A confirmation message will appear to confirm the previous action has been completed. An email will be sent to the recipient (User B) that will contain a hyperlink in the message body, allowing the recipient to gain access to the appropriate saved cart.

To customize the share cart email to add your company logo, custom message, etc. you can modify the email html template "SCShareEmail.htm" located off your portal root directory in /desktopmodules/smith.buynow/

The recipient email subject is auto populated using the following fields:

Portal Name - Saved Cart ID/Saved Cart Description
Example: Subject: Onlinewindows-12/Smith House

Share Cart Example
An architect, whom is registered with a site called "onlinewindows.com" running Smith Cart, saves a house lot of windows in a cart. Let's call this cart "Cart Z". He has obtained a price and a window schedule for his project using this method. A month later the architect awards the construction of the house to his contractor, ABC Construction.

The architect has specified windows from onlinewindows.com, and will now transfer the saved cart for that project to the successful contractor, ABC Construction, by clicking on the "Share" button and entering the email address for ABC Construction.

When ABC Construction receives the email link, they can simply follow the link, log in or create a new account, and retrieve the appropriate cart. No need to re-enter all the items into another cart. A big time saver!

ABC Constructions will only have access to the saved cart that the architect transferred. They will not be able to see/access any of the other saved carts that the architect may have.

Delete Button – When the user clicks the red x next to the one of their saved carts it will be deleted.

Move to Cart Button – When the user clicks the "Move to Cart" button the contents of their saved cart are moved to the live cart to edit or process as an order.

Save Cart features include:
- Customer can save their cart (Persists over Customer Visits)
- Customer can save multiple carts
- Customer can move saved cart to live cart for checkout
- Customer can add, update and delete saved carts
- Customer can share their cart
- Customer can print their saved cart

XXXV.   Customer Product Review Management

To add, edit or delete customer product reviews click the button titled "Customer Reviews" from the Store Admin Menu.

Customer Reviews

The following screen will be displayed when you choose "Customer Reviews".

Select a product from the dropdown and click filter customers and the following screen will be displayed:

A. Edit and Delete Customer Reviews

Edit Customer Reviews

From the grid view that lists your customer reviews click the edit link next to the review you wish to edit. Make the changes to the customer reviews and click the update button to save your changes. Click the cancel button to cancel your changes.

Delete Customer Reviews

From the grid view that lists your customer reviews, click the delete link next to the customer reviews you wish to delete.

XXXVI.   Cart Registration Page

The cart registration page is displayed to the user when you configure the cart to require the user to register before being able to add a product to their cart.   The "Add to Cart Requires Login" checkbox is in the cart admin settings under the "General Cart Setup" section.

When "Add to Cart Requires Login" is checked and an unauthenticated user clicks add to cart the following sign in screen is displayed:

If the user enters a valid login id and password then their profile is retrieved including shipping and billing information and the product is added to the cart and they are taken to the cart page.

If the user is a new user and clicks the "Continue" button they are directed to the following registration page:

Company Name:	
First Name:*	
Last Name:*	
Address Line 1:*	
Address Line 2:	
City:*	
Country:*	United States
State/Region:*	--Select State--
Zip/Postal Code:*	
Email:*	
Primary Phone:*	
Group:	-Select-
Builders license number:	
License Class:	
Expiration Date:	
Username:*	
Password:*	
Confirm Password:*	

BACK   NEXT ▶

Figure 28 - Cart Registration Page

When the user fills in all the required fields on the registration form and clicks next the registration page creates a new DNN account and adds the user to the appropriate DNN role. Next, the product is then added to the cart and the user is taken to the cart page.

The customer fields in the cart registration page above; company name, builders license number, license class and expiration date are custom fields that can be defined to be any custom field you like or can be hidden from the registration page. To configure the custom fields on the registration page see the section above titled "Registration Page Setup".

Example using the Registration Page with Custom Fields - A user clicks on the "add to cart" button and is directed to log in or create a new account page.   The user is a new user and clicks continue and they are taken to the registration page. On the registration page the user must choose whether they are a builder, home renovator or owner builder. (These are DNN roles and are setup by the administrator from the DNN admin menu). The only roles displayed in the group dropdown are the roles that have been configured in "Manage Order Discounts by Role" admin screen.

If the customer selects "Builder", the following fields will be displayed to the user:
- Custom Textbox 1 - Builders license number
- Custom Textbox 2 - License Class
- Custom Textbox 3 – Expiration Date

The fields above will be required fields for the user to enter. When the user fills in these fields correctly they will receive the associated builders discount applied to their cart total $ value as defined in "Manage Order Discounts by Role".

XXXVII.   Product Matrix by Category

Smith Cart supports building and displaying a cross-matrix of products by category or department. For example, a parts manufacturer could display a matrix of products with thumbnail images to customers as follows:

The matrix supports one or two x and y axis titles, nine product matrix columns and unlimited product matrix rows. When a user clicks on a thumbnail image or the sku link for a product in the matrix above they will be taken to the product details page where they can select product variants and checkout.

A.   Building a Product Matrix

Step 1 – Add a category to your store using the manage categories button from the store admin menu. The category is important because each product matrix you create will be based on a category.

Step 2 – Add your products to the store using the manage product button from the store admin menu. When adding products please note the image uploaded for a product is resized to a small thumbnail that is displayed in the product matrix.

Step 3 – From the store admin menu click the "Product Matrix" button

The following screen will be displayed when you click Product Matrix.

Step 4 – Enter the one or two rows of titles for the product matrix.   After entering the matrix title information click the "Add Product Matrix Header" button to save.

Step 5 – Enter the products for the matrix. Click the "Manage Matrix Detail" button on the top toolbar and the following screen will be displayed:

Figure 29 - Manage Matrix Detail Screen

The manage matrix detail screen above allows you to add, edit and delete product rows in the matrix. The "Y Axis Title" fields are the left most two title columns of the matrix. The fields labeled "Product 1-9" are all dropdowns lists where you can select the product you want in a particular column of the matrix.

Note: On step 4 and 5 make sure you select the same category for all the products you want displayed in the same matrix. Each unique product matrix is grouped by category and to display a product matrix in the front end cart the category id is passed in the querystring (url).

Step 6 – After you are finished creating your product matrix click the button titled "Show Product Matrix" on the top toolbar and you will be taken to a blank matrix page. Cut and paste the url from the browser to your clipboard:

The url should look something like this:

http://www.mysite.com/Home/ProductMatrix/mid/400/Default.aspx

Next, add the category id to the end of the url for the product matrix you want to display.

The url should look something like this:

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http://www.mysite.com/Home/ProductMatrix/mid/400/Default.aspx?categoryid=1

You can now use this url to link to the matrix from another page on your site using a button or hyperlink.

XXXVIII. Custom Product Fields

Smith Cart provides the ability to define unlimited custom product fields for products in your store.

A.   Product Template Fields

To add, edit or delete custom product template fields click the button titled "Custom Fields" from the Store Admin Menu.

The following screen will be displayed when you choose "Custom Fields".

Custom Product Fields Template

Sort Order:	
Label:	
Control Type:	-Select- ▼
Value(s):	
	For Dropdownlists enter comma seperated values (i.e. Small, Medium, Large).
Share:	☐
	Add New Control

Sort Order	Label	Control Type	Value(s)	Share		
1	Driving Range	DropDownList	Yes, No	No	Edit	Delete
2	Golf Season	TextBox	Year Round	No	Edit	Delete
3	Metal Spikes	DropDownList	Yes, No	No	Edit	Delete

The custom product fields template screen above is a form generator where the store admin can create an unlimited number of custom fields by product. The following fields will be available in the custom product form generator:

Field label – defines the label for the custom field

Control type dropdown list – Provides the ability to define values for dropdown lists, radio buttons and checkboxes.

Values – Defines the available values for the control you selected.

Share – The share flag allows you to share product template fields among multiple instances of the Smith BuyNow module.

B.   Edit and Delete Product Template Fields

Edit Custom Product Template Fields

From the grid view that lists your custom product template fields click the edit link next to the field you wish to edit. Make the changes to the custom product template fields and click the update button to save your changes. Click the cancel button to cancel your changes.

Delete Custom Product Template Fields

From the grid view that lists your custom product template fields, click the delete link next to the custom product template fields you wish to delete.

C. Manage Products

To define custom product fields click "Manage Products" from the Store Admin Menu:

Search Term Management

Smith Cart provides the ability to enter additional product search keys that are searchable from the product listing page search box or the SmithSearch Module. Smith Cart is also integrated with the DNN iSearchable interface so all your products are indexed and searchable using the regular DNN search facility.

This is useful if you would like to have products searchable on words that do not show up in the product name, SKU, summary or description or they can be used for product associations or common misspellings.

To enter additional search terms for your product click on the "Search Terms" sub menu under the "Products" menu item in the top navigation of the product setup screen. From the product setup screen select "Search Terms" from the "Products" sub menu.

Product Listing Page Search Terms – Enter a comma separated list of search terms in the text box provided.

Search Module Terms 1 – Comma separated list of values the search module uses to match on when searching the "Custom Dropdown 1" selection by the user.

Search Module Terms 2 – Comma separated list of values the search module uses to match on when searching the "Custom Dropdown 1" selection by the user.

Custom Fields

From the "Manage Products" screen click the "Edit" link next to the product you want to define custom product fields for and you will be taken to the product setup screen. From the product setup screen select "Custom Fields" from the "Products" sub menu.

When you click "Custom Fields" the following screen is displayed where the admin can assign the values to the product template fields defined in section "A" above titled Product Template Fields.

In addition to the populating the values for the custom fields the admin can also enter the tab name that the custom fields will be displayed in. The custom fields will appear in the tabbed interface on the product details page so the user can view the custom product information.

XXXIX. Product Detail Module

The Product Detail module is the product detail page that displays the detail information of your product of service. The product detail page displays the following information:

- Product Name and Price
- Main Product Image
- Tab control with product descriptions, related products, etc
- Product variants and variant images
- Image gallery with lightbox slideshow or zoom effect

A. Adding the Product Detail Module

To add the product detail module do the following:

1. Create a new DNN page
2. Add the product detail module to the page
3. Configure the product detail module settings

B. Configuring the Module Settings

To configure the Product Detail module settings hover your mouse over the module context menu (the drop down arrow in the upper right hand corner of the Smith Product Detail module container) and choose settings.

The following settings allow you to customize the Product Detail page of the cart checkout.

Product Detail Page Setup

BuyNow Page Name– Select the page where you have added the BuyNow module. This tells the Product Detail module which page to navigate to when the user clicks continue shopping or add to cart.

Button Theme – The cart comes with the following five professionally designed button themes:

- Black
- Blue
- Green
- Orange
- Silver

Select the button theme that matches your portal skin the best.

Tab Height and Width (Pixels) – Allows you to set the height and width of the tabbed product description on the product details page.

Show Product Sku - If checked, the product sku field will be displayed on the product detail page.

Show Product Summary - If checked, the product summary field will be displayed on the product detail page.

Show Sold Out Message - If checked, a sold out message will be displayed on the product detail page when quantity on hand for the product is zero.   The following is a screen shot of the sold message on the product details page:
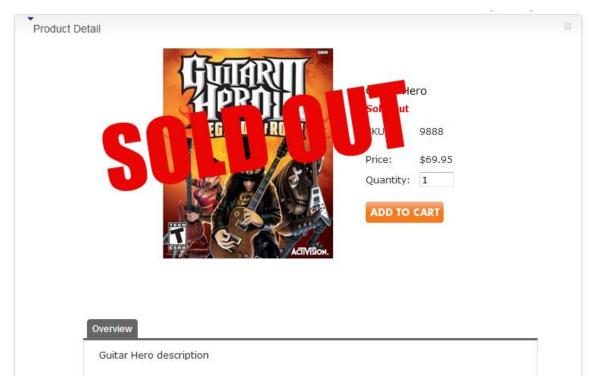
Figure 30 - Product Details page Sold Out Message

Show Product Rating – Check this box if you would like to display product ratings above the price on the product detail page.

Show Customer Reviews - If enabled, a new tab titled "Review" will be displayed on the product details page. This feature will allow customers to rate products and write reviews about products. Customers will be able to write down their experiences with the product for other customers. See the following screen shot of the customer reviews on the product details page:

Figure 31 - Customer Reviews on Product Detail page

At the top of the customer reviews is a summary section showing total reviews and average rating for the product.

The "Rate and Review this product" link inside the "Reviews" tab allows a user to submit a product review. The user must be logged in to submit a product review, if the user is not logged in and they click the rate and review button they will be directed to the login page to login. When an authenticated user clicks the "Rate and Review this product" link the following screen is displayed:
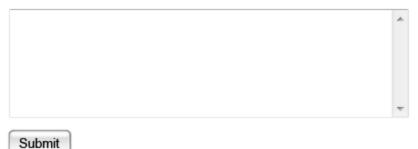
The user can hover their mouse over the stars and click the star to select a rating for the product. Fill in the rest of the screen and click the submit button to save the customer review. To manage customer reviews that have been submitted for products see the Manage Customer Reviews section below.

Show User Defined Listbox - When the show user defined listbox is checked, a listbox will be displayed on the product detail page of the checkout. The user defined listbox is useful for adding terms and conditions or custom content to the product detail page.

In order for the listbox to be displayed on the product detail page you must go to the product setup and check the box titled "Show custom fields on product detail page" this allows you to turn on/off the listbox by product.

User Defined Listbox Label – The Listbox label is the label that is displayed next to the custom list box displayed on the product detail page.

Listbox Text – The Listbox Text is the text that is displayed in the custom list box displayed on the product detail page.

Show Textbox - When the show user defined textbox is checked, a textbox will be displayed on the product detail page of the checkout. The user defined textbox is useful to customize your checkout and can be used to create any new field you choose. It is stored in the database for reference later on.

Textbox Label – Textbox label is the label that shows up on the product detail page of the checkout to the left of the custom text box.

Textbox Required – Check this box if you want to make the textbox required before the user can check out and make payment.

Click here for more information about styling the product details page

No Mini Cart (Default) – When selected no mini cart will be displayed on the product details page. When the user clicks the add to cart button the items will be added to the cart and the user will be redirected to the cart page.

Show Built In Mini Cart - When the show built in mini cart is checked, the mini cart will be displayed within the product details module. When the user clicks the add to cart button they will remain in the page and the item will be added to the mini cart.   See the following screen shot:

Figure 32 - Product Detail page with Mini Cart displayed

Use Mini Cart Module – This option requires the mini cart module to be added to the page. When "Use Mini Cart Module" is selected and the user clicks the add to cart button on the product details page they will remain in the page and the item will be added to the mini cart.

C.   Image Gallery and Effects

The following image gallery and effects are available on the product detail module.

Image Gallery and Effects

- ○ No Image Gallery or Effects
- ● Enable Image Gallery with Zoom Effect
- ○ Enable Image Gallery with Lightbox Effect

1.   No Image Gallery or Effects
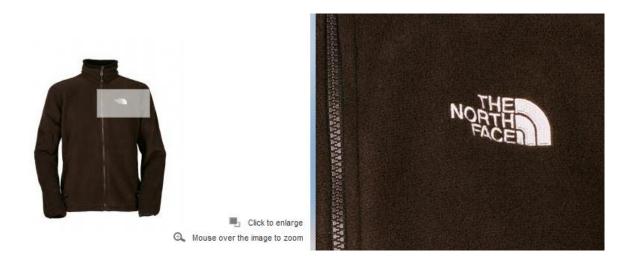
Select this option if you have not uploaded additional product photos from the product setup screen and do not want to use the lightbox or zoom effect for your product photos.

2.   Enable Image Gallery with Zoom Effect

Select this option if you would like to enable the zoom effect on your product images.

The Zoom feature enables a small magnifier window next to the main product image on the product detail page. This is useful in B2C or B2B sites where you would like to provide the user the ability to zoom in closely on your product images and view the finer details of the product before they check out and buy.

Click to enlarge

Mouse over the image to zoom

The user is able to move their mouse (magnifying glass) around the main product image and zoom in on all areas of the main product image. If you have uploaded additional product photos they will be displayed in the thumbnail image gallery and the user can click on any thumbnail image to swap out the main image and then zoom the image just selected. This enabled zooming on all six product photos.

Click here for an example of the zoom feature in action.

For more information on the zoom technology implemented in Smith Cart see the following link http://www.mind-projects.it/jqzoom_v10

3.   Enable Image Gallery with Lightbox Effect

Select this option if you would like to enable the lightbox effect on your product images.

Lightbox provides users with a simple and elegant view of your product images without having to leave the product details page in the cart. When the user clicks one of the thumbnail images on the product details page the image magnifies using a gliding animation. The images automatically resize according to the size of the product image you upload in the product setup screen. Additionally, Lightbox provides a slideshow of your product images that allows users to scroll forward and back viewing your magnified product images.

Product images uploaded from the product setup photo screen are displayed as a lightbox slideshow gallery on the product detail page.

Image 2 of 3

XL. Category Menu Module

Smith Cart comes with a separate category menu module that can be placed on any page in your portal. The following is a screen shot of the shopping cart with the category menu module added to the left pane:

When the Category Menu module is added to your page it will display all the categories and subcategories you have entered using the Manage Categories screen described under the "Configuring the Buy Now module settings" section above.

A.   Expanding a Category

When you click the arrow icon or the category name it will expand and show all the sub categories.

If you click the arrow icon or the category name it will collapse the category and hide the subcategories.

B.   Filtering products by Category and/or Sub Category
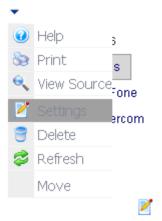
To filter the products by category or subcategory simply click on the category or subcategory and the products will be filtered by the category or sub category you clicked. When you click a category a breadcrumb of the category name dynamically changes in the BuyNow module title.

By default when the page loads all the products are displayed by the product sort order.

C.   Category Menu Module Settings

To view the Category Menu module settings hover your mouse over the drop down arrow in the upper corner of the My Account module container and choose "Settings".

Scroll to the bottom of the Category Menu module settings screen and click the plus sign next to the Category Menu Settings to expand the settings:

The category menu settings control the default behavior of the category menu when the page loads. Click one of the radio buttons to set the default behavior of the category menu:

BuyNow Page Name – If the category module is on the same page as the BuyNow module then it's not required that you select a page from the drop down list. If you add the category module to a page that does not have the BuyNow module on it then you must select the page name that has the BuyNow module. This tells the categories module which page to navigate to when the user clicks a category.

Default Behavior

Collapse All Categories – When collapse all categories is selected all the subcategories will be collapsed and only top level categories will be displayed.

Expand First Category – When expand first category is selected the first category will be expanded to show sub categories and all other categories will be collapsed hiding the subcategories.

Expand All Categories – When expand all categories is selected all categories will be expanded showing the respective subcategories.

Expand/Collapse Image

Use Arrow Images - When selected uses expand.collapse arrow images.

Use Plus/Minus Sign - When select the category menu module will display plus/minus signs to expand and collapse category menu subcategories.

Update Link - Click the update link at the bottom of the screen to save your changes.

D. Creating a Breadcrumb
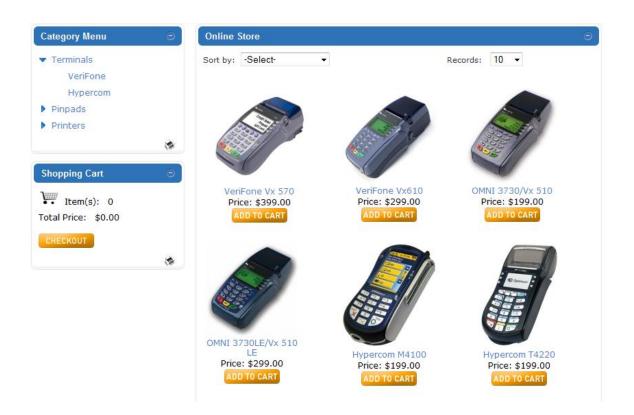
To style the category menu module to highlight the currently selected category or sub category please see the following forum post:

http://www.smith-consulting.com/forums/forumid/1/postid/2895/scope/posts.aspx#2895

XLI. Mini Cart Module

Smith Cart comes with a separate mini cart module that can be placed on any page in your portal. The following is a screen shot of the shopping cart with the mini cart module added to the right pane:

If you want to use the mini cart module with your shopping cart you must check the "Use MiniCart" checkbox in the cart settings. The behavior of the add to cart button changes depending on the mini cart checkbox.

Use MiniCart Checkbox not checked (Default)
When the use minicart checkbox is not checked and the user clicks the add to cart button from the product listing page, the product is added to the cart and the user is redirected to the main cart screen.

Use MiniCart Checkbox checked
When the use minicart checkbox is checked and the user clicks the add to cart button from the product listing page, the product is added to the cart and the mini cart and the user stays on the product listing page.

A.   Mini Cart Module Settings

To view the Mini Cart module settings hover your mouse over the drop down arrow in the upper corner of the mini cart module container and choose "Settings".

BuyNow Page Name – If the mini cart module is on the same page as the BuyNow module then its not required that you select a page from the drop down list. If you add the mini cart module to a page that does not have the BuyNow module on it then you must select the page name that has the BuyNow module. This tells the mini cart module which page to navigate to when the user clicks the mini cart checkout button.

XLII. Featured Products Module

Smith Cart includes a module called "Featured Products" that provides the option of displaying products in two different ways:

- Featured Products - Displays a listing of all products that have been checked as "Featured" in the product setup screen.
- Top Selling Products – Displays a listing of the top selling products in your store sorted by best selling products first.
- New Releases - Displays a listing of new product releases in your store sorted by latest product release first.

The Featured Products module can added multiple times and be placed on any page in your portal.
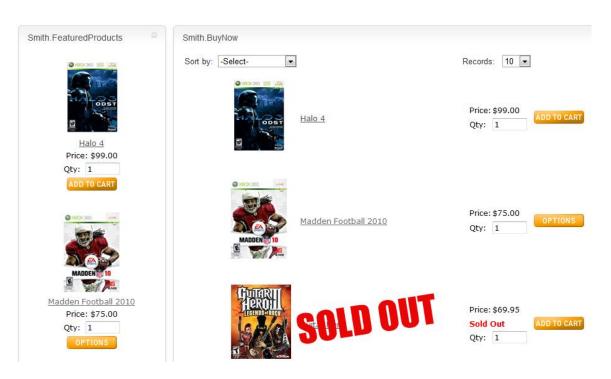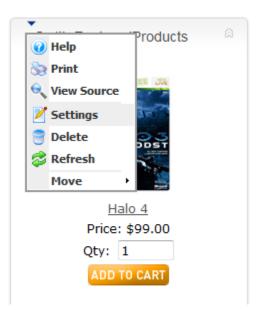
Figure 33 - Featured Products Module

Figure 8 above is a screen shot of a page with the feature products module installed. The Featured Products module can be added to the same page as the BuyNow module or on another portal page.

A.   *Featured Products Module Settings*

To view the Featured Products module settings, login using an account with Administrator permissions and hover your mouse over the drop down arrow in the upper corner of the Featured Products module container and choose "Settings".

Scroll to the bottom of the page to the Featured Products Settings:

BuyNow Page Name – Select the page name from the dropdown list that has the BuyNow module. This tells the featured products module which page to navigate to when the user clicks the add to cart button.

Product Detail Page – Select the page where you have added the product detail module. This tells the Featured Products module which page to navigate to when the user clicks a product from the product listing.

Show Featured Products – Select the radio button titled "Show Featured Products" to display a listing of all products that have been checked as "Featured" in the product setup screen.

Show Top Selling Products - Select the radio button titled "Show Top Selling Products" to display a listing of the top selling products in your store. Top selling products are sorted by best selling products first.

Featured Products Display Columns – Formats the featured products listing using the selected number of columns selected from the dropdown. Choose "1" for single column product layout, "2" for two column layout and so on.

Use Mini Cart – Check this box if you want to use the mini cart module.

Use MiniCart   ☑

Use MiniCart Checkbox not checked (Default)
When the use minicart checkbox is not checked and the user clicks the "add to cart" button from the product listing page, the product is added to the cart and the user is redirected to the main cart screen.

Use MiniCart Checkbox checked
When the use minicart checkbox is checked and the user clicks the "add to cart" button from the product listing page, the product is added to the mini cart and the user stays on the product listing page.

Show Product Sku – Check this box if you would like to display the "Product Sku" column on the cart screen during checkout. If the "Product Sku" checkbox is not checked then the product sku will be hidden.

Show Quantity on Hand - Check this box if you would like to display the "Quantity on Hand" column on the cart screen during checkout. If the "Quantity on Hand" checkbox is not checked then the quantity on hand will be hidden.

Hide Price – Check this box if you would like to hide the "Price" field on the product listing page and the product detail page. This is useful if your business only sells to resellers that require prior approval before buying your products.

Hide Quantity – Check this box if you would like to hide the "Quantity" textbox on the product listing page and the product detail page. This is useful if your business only sells to resellers that require prior approval before buying your products.

Hide Add to Cart – Check this box if you would like to hide the "Add to Cart" button on the product listing page and the product detail page. Hiding the "Add to Cart" button turns your store into a product catalog only and will not allow users to checkout and purchase product. This is useful if your business only sells to resellers that require prior approval before buying your products.

B.   Rotating Featured Products

For more information on how to rotate your products in the featured products module [click here](#).

XLIII.   Customizing the Look and Feel of Smith Cart

The cart uses your portal skin and container that you have chosen under the dnn admin - site settings menu so there is no additional skinning needed for the cart.

A.   Styling the cart with the module.css file

The cart uses a style sheet called module.css for styling specific font styles, sizes and colors in the cart if you wish to override the default portal skin. The style sheets are located in the respective module folders \desktopmodules in the following directories on your server:

- Smith.BuyNow module - \desktopmodules\smith.buynow\module.css
- Smith.ProductDetail module - \desktopmodules\smith.productdetail\module.css
- Smith.MiniCart module - \desktopmodules\smith.minicart\module.css
- Smith.Categories module - \desktopmodules\smith. categories \module.css
- Smith.FeaturedProducts - \desktopmodules\smith. featuredproducts \module.css
- Smith.MyAccounts module - \desktopmodules\ smith.myaccounts \module.css

- Smith.AffiliateTracking - \desktopmodules\ smith.affiliateTracking \module.css

The style sheets are commented which should give you a good indication to what screens and elements in the cart they apply to.

B.   How To Style the Cart Per Portal

DNN sites have the following order of precedence for Stylesheets (CSS):

1. skin.css
2. portal.css
3. module.css

Where skin.css has the highest precedence and module.css has the lowest precedence. This means that if you have the same class, for example a DIV class defined in skin.css and module.css the DIV class in the skin.css will override the DIV class in the module.css.

If you are running multiple portals/carts in the same portal and want to style each cart differently with different colors, etc then all you need to do is copy all the styles from the module.css to your portal.css or skin.css and change your styles to the ones you want. After you copy the styles they will exist in both the skin.css and module.css. The styles in portal.css or skin.css will override the styles in the module.css and since the portal.css/skin.css are per portal it will give you the ability to style the cart per portal.

C.   How To Change Text Styles

The "SmithProdText" style controls the font style and size of all the text labels in the cart.

D.   How to Change Image Buttons in the Cart

All the buttons in the cart are image buttons and can easily be changed to any image you like. The image buttons are stored in a sub directory titled "\images" under the module folder in the "\DesktopModules\Smith.modulename" directory. For example, if you want to replace the image buttons on the product listing page or checkout the image buttons are all located in the "\DesktopModules\Smith.BuyNow\Images" folder. By using file

explorer with the thumbnail viewer locate the button you want to replace and copy over it.

Alternatively, to locate a specific button on a page, for example, the "add to cart" button on the product list page in the BuyNow module:

1. Navigate to the \DesktopModules\Smith.BuyNow folder and locate the ascx page you want to change the image on. In this example the page name is called "productlist.ascx"
2. In the ascx page locate the image button you want to change and note the name of the image. The add to cart button on the productlist.ascx page is called "add_to_cart2.gif"
3. Copy your new add to cart image button to the \DesktopModules\Smith.BuyNow\Images folder

Your new image button will now be displayed in the cart!

If you are running multiple carts in the same DNN install please refer to the following forum post for instructions on how to style the cart per portal.

E.   How to Change the Cart Title Bar Color

To change the color of the checkout bar on the cart page modify the following styles in the module.css

```css
/* Cart styles */
td.CartHeader
{
      background: #006699;
      padding: 3px 3px 3px 3px;
}

.CartHeadText
{
    font-family:Verdana, Arial, Helvetica, sans-serif;
    font-size: 13px;
      color:#FFFFFF;
      font-weight: bold;

}
```

In the cart admin settings there are many options that allow you to customize the cart. The following is a summary of the cart admin settings. Please refer to the section above

titled "Configuring the BuyNow Settings" for a detailed explanation of all the cart configuration settings.

F. Product List Page Setup

- Product Catalog Columns: 1, 2, 3 or 4 column layout supported
- Product List Direction: Vertical or Horizontal
- Thumbnail Width (Pixels)
- Thumbnail Height (Pixels)
- Show/Hide Categories

Click here to view more Product Listing Page Settings

G. General Cart Setup

- Use MiniCart
- Show/Hide Login Screen
- Show/Hide Product Sku
- Show/Hide Quantity On Hand
- Show/Hide Price
- Show/Hide Quantity
- Show/Hide Add To Cart
- Add To Cart Requires Login
- Do Not Save Credit Card
- Enable Inventory Management
- Enable Wish List/Saved Cart
- User Entered Amounts
- Show/Hide Surcharge
- Surcharge Percent

Click here to view more General Cart Settings

H. Step 1 Checkout Page Setup

- Show Company Name:
- Show User Defined Textbox #1
- User Defined Label #1
- Show User Defined Textbox #2
- User Defined Label #2

- Show User Defined Dropdown:
- Dropdown Datasource: User entered Values User entered SQL
- Dropdown Label
- Dropdown Values
- Show Opt In Checkbox
- Show Multiple Ship To

Click here to view more Step 1 Page Settings

I.   Product Detail Page Setup

- Tab Width (Pixels)
- Tab Height (Pixels)
- Show/Hide Product Summary
- Show/Hide Customer Reviews
- Show/Hide Mini Cart
- Show/Hide Categories
- Show/Hide Listbox
- Listbox Label
- Listbox Text
- Show/Hide Textbox
- Textbox Label
- Textbox Required

Click here to view more Product Detail Page Settings

J.   Confirmation Page Setup (Before Payment)

- Require Login
- Show/Hide Login and Password
- Show Listbox
- Listbox Label
- Listbox Text
- Show/Hide Checkbox
- Checkbox Label
- Checkbox Required

Click here to view more Confirmation Page (Before Payment) Settings

K.   Confirmation Page Setup (After Payment)

- Show/Hide Special Instructions
- Email Download Link
- Show/Hide Textbox #1
- Label #1
- Show/Hide Textbox #2
- Label #2
- Show/Hide Date Field
- Date Label
- Show/Hide Dropdown
- Dropdown Label
- Dropdown Values
- Success Redirect URL
- Success Redirect Button
- Enable OnCheckout Complete Event

Click here to view more Confirmation Page (After Payment) Settings

For a detail description of all the settings listed above please refer to the section titled Configuring the Smith BuyNow Module Settings .

L.   Changing the Product List default records

To change the number of products displayed on the product listing page go to /desktopmodules/smith.buynow and open up productlist.ascx line 4-21 change the first ListItem value for the dropdown to the number you want to display. See the line below that is hightlighted in yellow.

```
<asp:DropDownList ID="ddlRecords" runat="server" AutoPostBack="True"
OnSelectedIndexChanged="ddlRecords_SelectedIndexChanged">
            <asp:ListItem>10</asp:ListItem>
            <asp:ListItem>20</asp:ListItem>
            <asp:ListItem>50</asp:ListItem>
            <asp:ListItem>100</asp:ListItem>

        </asp:DropDownList>
```

M.   *Customizing Page Layout*

Smith Cart ships with all the ascx files that can be modified by you to suit your requirements using your favorite editor just make sure that you do not delete any of the aspx controls, if you want hide a particular field or control just set the visible property of the control to false.

For example, if you want to hide the "Search" and "records" at the top of the product listing page naviage to the /desktopmodules/smith.buynow folder and open up productlist.ascx line 4-21 set ==Visible=false== for the dropdown and textbox controls that you do not want to display.

```
<tr>
<td class="NormalText">
Search: <asp:DropDownList ID="ddlSearch" runat="server" Width="120px">
asp:DropDownList>td>
<td width="5px">
td>
<td class="NormalText">
<asp:TextBox ID="txtSearch" runat="server" Width="208px">asp:TextBox>
<asp:Button ID="btnSearch" runat="server" Text="Go" OnClick="btnSearch_Click" />
Records:
<asp:DropDownList ID="ddlRecords" runat="server" AutoPostBack="True"
OnSelectedIndexChanged="ddlRecords_SelectedIndexChanged">
<asp:ListItem>10asp:ListItem>
<asp:ListItem>20asp:ListItem>
<asp:ListItem>50asp:ListItem>
<asp:ListItem>100asp:ListItem>
asp:DropDownList>
td>
<tr>
```

The layout of the pages can be changed by modifying the ascx pages in /desktopmodules/smith.buynow/ folder. Controls can be moved or hidden, table layouts can be changed and buttons can be added or changed.

N.   *Styling the Tab Control*

The tabs on the product detail page can be styled as follows:

- Open module.css in your editor
- Locate the following classes:

- o `class="tabs"` – controls styling the tab at the top of the tabbed interface.
  - o `class="tab_container"` – control styling the body of the tab control
- Save you changes

O. Styling Product Variants

To style the following product variant controls on the product detail page open the module.css located in the \desktopmodules\smith.productdetail\ folder and add the following styles:

- VariantLabel – Controls the style of variant labels
- VariantDropDownList – Controls the style of the variant dropdown list controls
- VariantRadioButtonList – Controls the style of the variant radiiobutton list controls
- VariantCheckBox – Controls the style of the variant checkbox controls
- VariantTextBox – Controls the style of the variant textbox controls

P. Customizing the Email Confirmations

To customize the order confirmation emails to add your company logo, custom message, etc. you can modify the email html template located off your portal root directory in /desktopmodules/smith.buynow/

OrderTemplate.htm – standard email template.

SHOrderTemplate.htm – email template used when shipping and handling is combined.

OrderSurchargeTemplate.htm - email template used when surcharge is enabled.

XLIV. Email Marketing

A. Customer Opt In

In the cart admin settings under "Checkout Step 1 Configuration" there is a checkbox titled "Show Opt In Checkbox". When checked, an Opt In checkbox is presented to the user during checkout that enables you to build a white list of email addresses. This is a valuable tool you can use for email marketing and email blasting. The Opt In field is stored to database with the customer email address.

B.   Storing IP Address of Customer

The shopping cart will automatically store the IP Address of user who successfully purchases products in the shopping cart. The IP Address is saved to the customer table along with the user's email address. This feature will allow you to comply with CANSPAM requirements for your email marketing campaigns.

XLV. Adding a product to the cart using a link

Smith Cart supports adding products directly to your cart by adding productid in the url or querystring. This is useful is you are developing your own product catalog navigation & menu system using another framework like flash or want to build your product catalog using normal dnn pages. The Smith Cart supports adding products directly thru the querystring in the url. Follow these steps to obtain the correct link for hyper linking:

1. Add a new product in the Smith Cart module admin from the manage products screen.
2. Click the view cart screen from the product catalog and go to the cart.
3. Cut and paste the url from the browser window and paste it into your favorite editor.
4. Add "?productid=1" to the end of the url where product id is the product id assigned after you add a product from the manage products screen in step 1 above.

Example URL:

http://localhost/dnn490/Store/tabid/55/ctl/Cart/mid/377/Default.aspx?productid=1

XLVI.   Filtering products by category using the query string

The product listing page of the cart allows you to filter products by category by passing the category id in the querystring. For example:

http://www.airsoftguns360.com/Home/tabid/38/Default.aspx?categoryid=1

When the category id is passed in the querystring the products are filtered by category.

This feature will allow you to create your own separate category page or module of links or images.

XLVII.   Multiple Ship To Addresses

Smith Cart will allow your customers to have multiple shipping addresses. In the cart settings under the "Checkout Step 1 Configuration" section there is a checkbox titled "Show Multiple Ship To". When "Show Multiple Ship To" is checked and the user is logged in, step 1 of the checkout will allow the user to manage multiple ship to addresses. See the following screen shot of Step 1 checkout:

The dropdown list titled "Select Ship To" allows the user to select from their saved ship to addresses. When the user selects an address from the dropdown list the fields in the form will be automatically populated with the saved ship to address.

A.   Add New Ship To Address

When the user clicks the "Add New Ship To Address link the following page is displayed:

Manage Ship To Addresses

First Name:*	
Last Name:*	
Address Line 1:*	
Address Line 2:	
City:*	
Country:	United States
State/Region:*	--Select State--
Zip/Postal Code:*	
Email:*	
Primary Phone:*	
Secondary Phone:	

Add Ship To Address

First Name	Last Name	Address	Address	City	State	Country	Zip		
dave	smith	20 kendall		laguna	CA	US	92688	Edit	Delete
Ella	Smith	23232 orchard		laguna	CA	US	92677	Edit	Delete

Figure 34 - Manage Ship To Address Screen

The Manage Ship To Address screen above allows your customers to add, update and delete as many shipping addresses as they want.

XLVIII.   Store Reports

Click the button titled "Reports" from the Store Admin Menu to display the Store Reports Menu page.

Reports

The following screen will be displayed when you click Reports:

Store Reports Menu

Top Products

Top Customers

Daily Sales Report

Monthly Sales Report

Quarterly Sales Report

Sales By Coupon

Affiliate Sales

Order Detail Report

Product Summary

Figure 35 - Store Reports Menu

A.   Top Products Report

The Total Sales by Product report will compute your total sales and total quantity sold grouped by product. If you click on any of the column titles the report will sort in ascending order by the column clicked on. If you click again on any of the column titles the report again the report will sort in descending order by the column you clicked on.

Total Sales by Product Report

From Date: [_____] 31   To Date: [_____] 31   [Filter] [Show All]

< Prev Next >

Sku	Product Name	Unit Cost	Quantity Sold	Total Sales
1234	VeriFone Vx 570	$399.00	41.00	$16,359.00
4545454	VeriFone Vx610	$299.00	7.00	$2,093.00
3434	OMNI 3730LE/Vx 510 LE	$299.00	2.00	$598.00
9898	Hypercom T4220	$199.00	3.00	$597.00
1212	S9 Fully Compatible Pinpad	$99.00	6.00	$594.00
3434	Hypercom T7 Plus	$209.00	2.00	$418.00
9898	Hypercom T4210	$299.00	1.00	$299.00
9898	Printer 900 Roll Printer	$0.23	6.00	$294.69
0909	Hypercom T4100	$199.00	1.00	$199.00
4543	Pin Pad 1000 SE PCI	$99.00	2.00	$198.00
9999	Tranz 380	$99.00	1.00	$99.00
			Total:	$21,748.69

B.   Top Customers Report

The Top Customers Sales report will compute your total sales and total quantity sold grouped by customer. If you click on any of the column titles the report will sort in ascending order by the column clicked on. If you click again on any of the column titles the report again the report will sort in descending order by the column you clicked on.

Top Customers Report

From Date: [_____] 31   To Date: [_____] 31   [Filter] [Show All]

< Prev Next >

First Name	Last Name	Email	DNN Login	Quantity Sold	Total Sales
david	Smith	someone@somewhere.com	Christian	7	$3,191.03
Joe	Johnson	anyone@anywhere.com	demo	2	$638.42
Gabriel	Rosario	gabriel-rosario@hotmail.com		1	$850.88
dave	smith	dave@smithcart.com		1	$425.97

< Prev Next >   **Total:** $5,106.30

C.   Daily Sales Report

The Daily Sales report will compute your total sales and total quantity sold grouped by day. If you click on any of the column titles the report will sort in ascending order by the column clicked on. If you click again on any of the column titles the report again the report will sort in descending order by the column you clicked on.

Daily Sales Report

From Date: [   ] 31   To Date: [   ] 31   [Filter]   [Show All]

< Prev Next >

OrderDate	Quantity Sold	Total Sales
06/02/2011	2	$211.38
05/28/2011	1	$2,555.83
05/25/2011	2	$1,703.88
05/24/2011	1	$105.69
05/20/2011	2	$957.63
05/19/2011	1	$425.97
05/18/2011	1	$425.97
05/17/2011	1	$425.97
05/06/2011	5	$848.73
05/04/2011	1	$425.97

< Prev Next >   **Total: $8,087.02**

D.   Monthly Sales Report

The Monthly Sales report will compute your total sales and total quantity sold grouped by month. If you click on any of the column titles the report will sort in ascending order by the column clicked on. If you click again on any of the column titles the report again the report will sort in descending order by the column you clicked on.

Monthly Sales Report

From Date: [   ] 31 To Date: [   ] 31 [Filter] [Show All]

< Prev Next >

Year	Month	Quantity Sold	Total Sales
2011	6	2	$211.38
2011	5	16	$8,301.61
2011	4	15	$6,508.79
2011	3	8	$3,511.31
2011	2	14	$5,961.44
2011	1	9	$3,952.24

< Prev Next >   **Total:** $28,446.77

E.   Quarterly Sales Report

The Quarterly Sales report will compute your total sales and total quantity sold grouped by quarter. If you click on any of the column titles the report will sort in ascending order by the column clicked on. If you click again on any of the column titles the report again the report will sort in descending order by the column you clicked on.

Quarterly Sales Report

From Date: [   ] 31 To Date: [   ] 31 [Filter] [Show All]

< Prev Next >

Year	Quarter	Quantity Sold	Total Sales
2011	1	31	$13,424.99
2011	2	33	$15,021.78

< Prev Next >   **Total:** $28,446.77

F.   Coupon Usage Report

The Coupon Usage report will list coupon code, coupon count and total discount sorted by highest to lowest coupon usage count. If you click on any of the column titles the

report will sort in ascending order by the column clicked on. If you click again on any of the column titles the report again the report will sort in descending order by the column you clicked on.

G.   Order Detail Report

The Order Detail Report will list the order details sorted in ascending order by "order date", Oldest to newest. If you click on any of the column titles the report will sort in ascending order by the column clicked on. If you click again on any of the column titles the report again the report will sort in descending order by the column you clicked on.

Date Filter – This filtering by "From Date" and "To Date" that will allow filtering the report by order date range. When the report is first loaded it will default to filtering by current month.

Order Detail by Date Report

From Date: [   ] 📅   To Date: [   ] 📅   [Filter]   [Show All]

< Prev Next >

Order Date	OrderID	Amount	Discount	Shipping	Handling	Tax	Total
1/17/2011	1	$399.00	$0.00	$0.00	$0.00	$26.97	$425.97
1/18/2011	2	$797.00	$0.00	$0.00	$0.00	$53.88	$850.88
1/21/2011	3	$798.00	$0.00	$0.00	$0.00	$53.94	$851.94
1/21/2011	4	$98.00	$0.00	$0.00	$0.00	$6.62	$104.62
1/23/2011	5	$617.00	$0.00	$0.00	$0.00	$41.71	$658.71
1/24/2011	6	$99.00	$0.00	$0.00	$0.00	$6.69	$105.69
1/27/2011	7	$399.00	$0.00	$0.00	$0.00	$26.97	$425.97
1/28/2011	8	$196.00	$0.00	$0.00	$0.00	$13.25	$209.25
1/30/2011	9	$299.00	$0.00	$0.00	$0.00	$20.21	$319.21
2/1/2011	10	$299.00	$0.00	$0.00	$0.00	$20.21	$319.21
	TOTALS	$12,176.00	$0.00	$0.00	$0.00	$823.02	$12,999.02

H.   Product Summary Report

The Product Summary Report - Displays the total items sold for specific date range, when the report is first loaded it will default to filtering by current month, sorted in ascending order by "Product SKU", lowest to highest. If you click on any of the column titles the report will sort in ascending order by the column clicked on. If you click again on any of the column titles the report again the report will sort in descending order by the column you clicked on.

Date Filter – Allows filtering by "From Date" and "To Date" that will allow filtering the report by order date range.

Product Summary Report

From Date: [____] [31]   To Date: [____] [31]   [Filter] [Show All]

< Prev Next >

Sku	Product Name	Category	Unit Cost	Quantity Sold	Total Sales
0909	Hypercom T4100	Terminals	$199.00	1.00	$199.00
1212	S9 Fully Compatible Pinpad	Pinpads	$99.00	6.00	$594.00
1234	VeriFone Vx 570	Terminals	$399.00	41.00	$16,359.00
3434	Hypercom T7 Plus	Terminals	$209.00	2.00	$418.00
3434	OMNI 3730LE/Vx 510 LE	Terminals	$299.00	2.00	$598.00
4543	Pin Pad 1000 SE PCI	Pinpads	$99.00	2.00	$198.00
4545454	VeriFone Vx610	Terminals	$299.00	7.00	$2,093.00
9898	Hypercom T4210	Terminals	$299.00	1.00	$299.00
9898	Hypercom T4220	Terminals	$199.00	3.00	$597.00
9898	Printer 900 Roll Printer	Printers	$0.23	6.00	$294.69
9999	Tranz 380	Pinpads	$99.00	1.00	$99.00

< Prev Next >   **Total:** $21,748.69

XLIX.   Import Products

A.   Preparing the Import Data

The Import Products function allows you to import categories, manufacturers, products, variants and images from an Excel spreadsheet.

When importing your products the program will lookup products by sku, if the product currently exists in the database the import program will update the existing product and if the product sku does not exist the import program will insert a new record in the database.

Including column headings as the first row in the spreadsheet is optional. The sheet name of your Excel spreadsheet that contains the data your want to import must be named "Sheet1".

Field Specification for version 3.97 and above:

1. CategoryName
2. SubcategoryName
3. Manufacturer
4. ProductSortOrder
5. ProductSku
6. ProductName
7. UnitCost
8. QuantityOnHand
9. Weight
10. Summary
11. ProductDescription
12. Description2
13. Description3
14. Description4
15. Description5
16. ThumbImage1
17. LargeImage1
18. ZoomImage1
19. LargeImage2
20. ZoomImage2
21. LargeImage3
22. ZoomImage3
23. LargeImage4
24. ZoomImage4
25. LargeImage5
26. ZoomImage5
27. VariantGroup1
28. VariantName1
29. VariantPriceDif1
30. VariantWeightDif1
31. VariantImage1
32. VariantDisplayType1
33. VariantGroup2
34. VariantName2
35. VariantPriceDif2
36. VariantWeightDif2
37. VariantImage2
38. VariantDisplayType2
39. VariantGroup3
40. VariantName
41. VariantPriceDif3

42. VariantWeightDif3
43. VariantImage3
44. VariantDisplayType3
45. VariantGroup4
46. VariantName4
47. VariantPriceDif4
48. VariantWeightDif4
49. VariantImage4
50. VariantDisplayType4
51. VariantGroup5
52. VariantName5
53. VariantPriceDif5
54. VariantWeightDif5
55. VariantImage5
56. VariantDisplayType5
57. VariantSku
58. VariantQtyOnHand

If you are importing variants the VariantDisplayType field is required. The following are the options for the VariantDisplayType field:

- DropdownList
- RadioButtons
- CheckBox
- TextBox

Cart version 3.97 and above field specification and sample spreadsheet - [Click here](#)

Cart version 3.05 to 3.96 field specification and sample spreadsheet - [Click here](#)

Cart version 3.04 and below field specification and sample spreadsheet - [Click here](#)

B.   Importing the Data

To import your products click the button titled "Import Products" from the Store Admin Menu.

Import Products

After you click Import Products, the following screen will be displayed

import products ▼

Import Products

Step1: Select File for Import: [   ] Browse...

Step2: Click here to Import Products: [Import Category and Products]

Step1: Click the browse button and choose the excel file to upload.

Step2: Click the button titled "Import Categories and Products"

Step3: Copy the physical images (jpeg, gif, etc) to your server in the following directories:

Cart versions 2.44.14 and prior image locations are as follows:

- Thumbnail Images - \desktopmodules\buynow\thumbnails
- Large Images - \desktopmodules\buynow\images

Cart versions 2.44.16 and greater image locations are as follows:

- Thumbnail Images - \portals\[yourportalid]\smithcart\thumbnails
- Large Images - \portals\[yourportalid]\smithcart \images

C.   Generating Thumbnail images

When products are uploaded using the cart product setup screen thumbnails are automatically generated by the cart. If you are importing your products the thumbnail images are not automatically generated and you will need to upload your thumbnail images. Here is a tip to quickly generate your thumbnail images all at once.

1. Download the Image Resizer PowerToy from Microsoft for your flavor of Windows.
2. Go to Portals/(Portal #)/SmithCart/Thumbnails
3. CTRL-A to select all files
4. Right-click on a file, select "Resize Image"

L.   Export Orders

Smith Cart provides the ability to export customer and order data from the cart database to CSV and XLS that can then be imported into your ERP system or sent to your fulfillment house. To export orders do the following:

1. Login as admin to your DNN portal and navigate to the page where you have the BuyNow module is loaded.

2. Hover your mouse over the drop down arrow in the upper corner of the Smith Buy Now module container and choose "Store Admin Menu".

3. Click the "Export Orders" button from the Store Admin Menu.

Export Orders

The following screen will be displayed:

The export orders screen displays a grid view listing of all the orders sorted showing newest orders first.

Sorting the Order Grid
Each column heading in the grid is a hyperlink, if you click the column heading in the grid it will sort on the field heading clicked in ascending order, if you click the column heading again the grid will sort in descending order on the field heading clicked.

Filtering Orders by Date Range

To filter orders by date range just click on the calendar icons for "From Date" and "To Date" and choose the date range you want and then click the filter button and the order grid will filter all the orders by date range on the order date field. To remove the filter click the "Show All" button and all the orders will be displayed again.

Filtering Orders using custom criteria

In the header of the order grid are textboxes and dropdown lists that allow you to filter the grid by order id, order status, first name, last name and payment status.

Simply enter the value in the textbox or select the item from the dropdown list you want to filter on and click to the filter button and the user payment grid will filter on the criteria you entered. To remove the filter and show all orders click the "Show All" button.

Choosing the Order Export Format

There are two different export formats to select from; Hierarchical and Flat Format

Hierarchical Format

The hierarchical format creates the order and order detail records on separate rows in the CSV file. For example:

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	O	746	9/18/2010 17:44	SuperUsel	Account		20 kendall		laguna	CO	92677	US	dave@sm
2	OD	2323	Sean White Snowboarding	77	1	77							
3	O	745	9/18/2010 17:42	SuperUsel	Account		20 kendall		laguna	CA	92677	US	dave@sm
4	OD	2323	Sean White Snowboarding	77	1	77							
5	O	744	9/16/2010 2:00	mike	mikey		20 kendall		laguna	CA	92323	US	mike@mi
6	OD	2323	Sean White Snowboarding	77	1	77							
7	O	743	9/16/2010 1:43	SuperUsel	Account		20 kendall		laguna	CO	92677	US	dave@sm

Hierarchical Format Field Specification

Header Row
1. Row Type - "O" = Header Row
2. Order ID
3. Order Date
4. First Name
5. Last Name
6. Company Name
7. Address1
8. Address2
9. City
10. State
11. Zip Code
12. Country
13. Email
14. Phone
15. Order Status
16. Ship Method
17. Special Instructions
18. Shipping Total
19. Tax Total
20. Handling Charge
21. Discount
22. Order Total

Detail Row
1. Row Type - "OD" = Detail Row
2. Sku
3. Product Name

4. Unit Cost
5. Quantity
6. Line Total

Flat Format

The flat format creates the order and order detail records on separate rows in the CSV file.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	746	9/18/2010 17:44	SuperUser	Account		20 kendall		laguna	CO	92677	US	dave@sm	Shipped	
2	745	9/18/2010 17:42	SuperUser	Account		20 kendall		laguna	CA	92677	US	dave@sm	Shipped	
3	744	9/16/2010 2:00	mike	mikey		20 kendall		laguna	CA	92323	US	mike@mi	Shipped	
4	743	9/16/2010 1:43	SuperUser	Account		20 kendall		laguna	CO	92677	US	dave@sm	Shipped	
5	742	9/16/2010 1:42	SuperUser	Account		20 kendall		laguna	CO	92677	US	dave@sm	Shipped	
6	741	9/16/2010 1:37	SuperUser	Account		20 kendall		laguna	CO	92677	US	dave@sm	Shipped	
7	740	9/16/2010 1:35	SuperUser	Account		20 kendall		laguna	CO	92677	US	dave@sm	Shipped	
8	739	9/6/2010 20:17	dave	smith		20 kendall		laguna	CA	92677	US	dave@jkd	Shipped	Ground
9	738	9/6/2010 17:55	dave	smith		20 kendall ,		laguna	CA	92677	US	dave@erc	Shipped	Free
10	737	9/6/2010 17:53	dave	smith		20 kendall ,		laguna	CA	92677	US	dave@erc	Shipped	Free

Flat Format Field Specification

1. Order ID
2. Order Date
3. First Name
4. Last Name
5. Company Name
6. Address1
7. Address2
8. City
9. State
10. Zip
11. Country
12. Email
13. Phone
14. Order
15. Status
16. Ship Method
17. Special Instructions
18. Shipping Total
19. Tax Total
20. Handling Charge
21. Discount
22. Order Total
23. Affiliate ID

24. Sku
25. Product Name
26. Quantity
27. Unit Cost

Please see the following [fourm post for sample output files](#).

Updating the Order Status After Export

Check the following checkbox to automatically set the order status to "Shipped" after records are exported.
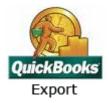
☐ Update Order Status to Shipped After Export

Finally, click the "Export Orders" button to export your orders to CSV format.

LI. QuickBooks Integration

Smith Cart provides the ability to export customer and order data from the cart database to CSV and IIF files that can then be imported into QuickBooks. To export your customer and order data from the cart to QuickBooks follow these steps:

1. Login as admin to your DNN portal and navigate to the page where you have the BuyNow module is loaded.

2. Hover your mouse over the drop down arrow in the upper corner of the Smith Buy Now module container and choose "Store Admin Menu".

3. Click the "QuickBooks Export" button from the Store Admin Menu.

The following screen will be displayed when you click the "QuickBooks Export":

QuickBooks Export

OrderID	OrderDate	First Name	Last Name	Email	Primary Phone	City	State	Zip	Amount
642	7/14/2010 6:15:38 PM	dave	smith	dave@ererer.com	222-222-2222	laguna	CA	92688	69.00
589	6/10/2010 8:54:48 PM	nate	robinson	nate@robo.com	222-222-2222	laguna	VT	92677	110.00
588	6/10/2010 8:33:47 PM	lamar	odem	lamar@odem.com	222-222-2222	laguna	VT	92677	110.00
587	6/10/2010 7:46:29 PM	raja	rondo	raja@rondo.com	222-222-2222	laguna	CA	92677	110.00
585	6/10/2010 6:21:48 PM	dave	smith	dave@ererer.com	222-222-2222	laguna	CA	92688	110.00

[Back] [Export Customers] [Export Orders]

All the orders with a status of "Open" are listed in the QuickBooks data grid.

A. Exporting Customer Data from Smith Cart

1. Click on the "Export Customers" button to export all customers listed in the data grid.

2. A dialog box will pop up giving you the option to open or save the CSV file.

3. Click the "Save" button in the dialog box to save the CSV file to a directory on your computer.

B. Importing the Customer CSV file into QuickBooks

QuickBooks provides the ability to import customer data from a comma-separated value (CSV) file.

1. Back up the QuickBooks file into which you will be importing the data. Importing data into the file cannot be undone, so, if the data doesn't import correctly, it can be a mess to remove. To back up the original file, simply go to "File" and "Save as" and save the file under a different name to the desktop of your computer.

2. Go to "File" menu and select the "Import/Export" option. Select "Import" when prompted to open the "Import" feature in QuickBooks.

3. Follow the screens that come up in the "Import Data" window to prepare the QuickBooks import. When prompted, upload the ".csv" file that you created in the "Exporting Customer Data from Smith Cart" above.

4. Click the "Import" button in the "Import Data" window. QuickBooks imports the data from the uploaded file and integrates it into the data already saved in the QuickBooks file.

Click here for more information on how to import a customer CSV file to QuickBooks.

C.   Exporting Order Data from Smith Cart

1. Click on the "Export Orders" button to export all orders listed in the data grid.

2. A dialog box will pop up giving you the option to open or save the IIF file.

3. Click the "Save" button in the dialog box to save the IIF file to a directory on your computer.

D.   Importing the Order IIF file into QuickBooks

1. Open QuickBooks on your computer.

2. Load your company profile.

3. Move to "File" at the top of the QuickBooks screen and select "Utilities" from the file menu.

4. Chose "Import" for the Utilities menu and click on "IIF files."

5. Locate the IIF Order file you created in the section "Exporting Order Data from Smith Cart" above.

6. Click the "Import" button.

LII. Exporting Mailing Labels to Endicia Dazzle

The Smith Cart is integrated with Endicia Dazzle (endicia.com) to print USPS mailing labels, receive tracking numbers and print postage. To export the open orders that are ready to ship from the cart to Endicia follow these steps:

1. Login as admin to your DNN portal and navigate to the page where you have the Smith Cart loaded.

2. Hover your mouse over the drop down arrow in the upper corner of the Smith Buy Now module container and choose Manage Orders.

3. From the Manage Orders screen verify that the orders you want to print mailing labels for have a status of "Open". Change the status of the order to another status (i.e. Backordered or On Hold) if you do not want to ship the order and include the order in the xml file to be exported to Endicia.

4. After you have verified that all the orders you are ready to ship have a status of "Open" return to the main cart page. Hover your mouse over the drop down arrow in the upper corner of the Smith Buy Now module container and choose "Store Admin Menu".

5. Click the "Endicia Export" button from the Store Admin Menu.

Endicia Export

The following screen will be displayed when you click the "Endicia Export":

Now In: **Home**   SuperUser /

▼

Export Print Mailing Labels to Endicia

Step 1: Confirmation - All orders with a status of "Open" will be exported

Step 2: Click here to export mailing labels to xml file   [Export Endicia Dazzle]

6. Click on the "Export Endicia Dazzle" button to export all orders with a status of "Open" to Endicia Dazzle using the xml interface.

7. Save the file (XML) produced to a directory on your computer.

8. All orders successfully exported to the Endicia xml file will automatically have their order status changed to "Shipped".

9. Launch the Endicia Dazzle program. Choose "File -> Print From" menu and locate the XML file that you saved to your computer in step 6 above.

10. Endicia will print the postage out and produce an output XML file into the same directory.

LIII. Exporting Mailing Labels to UPS WorldShip

Smith Cart is integrated with UPS WorldShip program to print mailing labels, receive tracking numbers and print postage. To export the open orders that are ready to ship from the cart to UPS WorldShip follow these steps.

1. Login as admin to your DNN portal and navigate to the page where you have the Smith Cart loaded.

2. Hover your mouse over the drop down arrow in the upper corner of the Smith Buy Now module container and choose Manage Orders.

3. From the Manage Orders screen verify that the orders you want to print mailing labels for have a status of "Open". Change the status of the order to another status (i.e. Backordered or On Hold) if you do not want to ship the order and include the order in the xml file to be exported to UPS WorldShip.

4. After you have verified that all the orders you are ready to ship have a status of "Open" return to the main cart page. Hover your mouse over the drop down arrow in the upper corner of the Smith Buy Now module container and choose "Store Admin Menu".

11. Click the "UPS WorldShip Export" button from the Store Admin Menu.

UPS WorldShip Export

The following screen will be displayed when you select "UPS WorldShip Export":

UPS WorldShip Export

UPS WorldShip Export

OrderID	OrderDate	First Name	Last Name	Email	Primary Phone	City	Country	State	Zip	Amount	Select
162	1/1/2010 4:11:47 PM	dave	smith	dave@smithcart.com	222-222-2222	laguna	US	CA	92677	104.90	✓
161	1/1/2010 2:59:18 PM	dave	smith	dave@smithcart.com	222-222-2222	laugna	US	CA	92677	159.90	✓
160	1/1/2010 2:45:27 PM	dave	smith	dave@smithcart.com	222-222-2222	laguna	US	CA	92677	159.90	✓
159	1/1/2010 2:35:25 PM	dave	smith	dave@smithcart.com	222-222-2222	laguna	US	CA	92677	159.90	✓
158	1/1/2010 1:54:50 PM	dave	smith	dave@smithcart.com	222-222-2222	laguna	US	CA	92677	168.90	✓
157	12/24/2009 8:50:31 PM	dave	smith	sss@dfdfdf.com	222-222-2222	laguna	ZA	kjkj	12122	87.00	✓

Back   Export Orders

5. All the orders with a status of "Open" by default will be checked. Uncheck any orders you do not wish to ship and create and create mailing labels for.

6. Click on the "Export Orders" button. To export all orders selected to UPS WorldShip using the xml interface.

7. Save the file (XML) produced to a directory on your computer.

8. All orders successfully exported to the UPS WorldShip xml file will automatically have their order status changed to "Shipped".

9. Launch the UPS WorldShip program.

10. Use the XML Auto Import feature in the UPS WorldShip program to import and process the xml file you just exported from the cart. See the UPS auto import guide on how to setup the WorldShip program to import the XML file
http://www.ups.com/media/en/XML_Technical_Support_Guide_Final.pdf

11. Once WorldShip imports the .xml file and prints the labels, your processed .xml file is renamed, and a file containing the shipment information and tracking number is automatically created and placed in the same folder as the .xml file.

LIV. Search Module

The Search module is a separate module in Smith Cart that can be placed in any pane on any page in your portal and allows the user to search and quickly locate products in your catalog.

When the user enters/selects their search options and clicks "Search" the search module will query the category and product tables and the user will be redirected to the BuyNow module product listing page and the products will be filtered according to the search criteria entered in the search module. If a search returns no rows then the search module will display a message "No records found" and remain on the same page.

The following is a screen shot of the Search module after you add it to a page:

Figure 36 - Search Module

Configuring the Search module settings

Hover you mouse over the context menu of the module and click settings and the following screen will be displayed:

⊟ Smith Search Settings

BuyNow Page Name:	Online Store
Button Theme:	Green

Show DropDownList #1: ☑

DropDownList 1 Label: Year:

DropDownList #1:

1995,1996,1997,1998,1999,2000,2001,2002,2003,2004,2005,2006,2007,2008,2009

(Add comma separated list of dropdown items)

Show DropDownList #2: ☑

DropDownList 2 Label: Make/Model:

DropDownList #2:

Ford,GM,Chrysler,Toyota,BMW,Mercedez

(Add comma separated list of dropdown items)

BuyNow Page Name – Allows the store admin to configure which BuyNow module to search products in and redirect to display search results.

Custom Dropdown 1 – Allows entry of comma separated values to populate dropdown on search module with.

Custom Dropdown 1 Label – Displayed next to dropdown #1

Custom Dropdown 2 – Allows enrty of comma separated values to populate dropdown on search module with.

Custom Dropdown 2 Label – Displayed next to the dropdown #2

Show Category Dropdown – When checked will show a dropdown list in the search module that is populated by all the category and sub category names.

Category Label Textbox – Allows you to enter a custom value that is used as the label for the category dropdown filter in the search module.

Show Textbox – When checked will show a textbox in the search module that allows the user to enter keyords to search on. The search module will a wildcard search on the search terms entered in the search textbox.

Textbox Label – Allows you to enter a custom value that is used as the label for the customer search textbox in the search module.

Show Sort – When checked displays a sort dropdown list in the search module with the following sort options:

- Custom Dropdown 1
- Custom Dropdown 2
- Category
- Product Price

Show Category DropDown: ☑

Category Label: Categories:

Show Search TextBox: ☑

TextBox Search Label: Keyword Search:

Show Sort DropDown: ☑

Sort DropDown Label: Sort:

Sort DropDown Options *(Select items to display in sort dropdown list)*

DropDownList #1: ☑
DropDownList #2: ☑
Category Name: ☑
Product Price: ☑

LV. Quick Order Entry Module

Smith Cart comes with a separate module called "Quick Order Entry" module that allows frequent users like resellers or distributers to quickly locate items and add them to the cart for checkout.

Configuring the Quick Order Entry module settings

Hover you mouse over the context menu of the module and click settings and the following screen will be displayed:

Quick Order Entry Setup

BuyNow Page Name: Online Store ▼

Show Extended Price: ☑

Show Total: ☑

BuyNow Page Name– Select the page where you have added the BuyNow module. This tells the Quick Order Entry module which page to navigate to when the user clicks the add to cart button.

Show Extended Price - When checked displays a line total for each row in the grid.

Show Total - When checked displays the grand total in the footer of the quick order entry module..

How the Quick Order Entry module works

Users can enter a SKU and quantity and verify the product description and add to cart.

Quick Order Entry Module

Sku	Qty	Description		
1233xbox	5	Halo 4 Xbox 360 Video Game	EDIT	✖

ADD TO CART

When the user enters a SKU and presses "Enter" the Quick Order Entry module displays the product name for verification and allows the user to enter a quantity as illustrated in the following screen shot:

Once the user inputs the quantity and presses enter the product is automatically added the quick cart. The user then enters in the next item they wish to order. When the user is done adding all the items they want to buy to the quick cart they click the "Add to Cart" button to move the items to the main cart and are taken to the cart page to check out.

LVI. Address Book Module

The purpose of this module is for buyers, purchasing managers, customer service reps taking phone orders or any other person who frequently buys items for other customers.

LVII. My Accounts Module

Smith Cart comes with a separate module called the "My Accounts" module that allows the user to login to the portal and view their order history.

		Order ID	Order Date	First Name	Last Name	Ship Address	Ship City	Ship State	Ship Zip Code	Ship Method	Status
Select	Invoice	730	8/31/2010	SuperUser	Account	20 kendall,	laguna	California	92677	Free	Open
Select	Invoice	731	9/1/2010	SuperUser	Account	20 kendall,	laguna	CA	92677	Parcel Post	Cancelled
Select	Invoice	732	9/1/2010	SuperUser	Account	20 kendall,	laguna	CA	92677	Parcel Post	Cancelled

First Prev 0-3 of 3 Next Last

Order Detail

OrderID	Product Name	Quantity	UnitCost	
731	Sean White Snowboarding	1.00	$77.00	

Payment History

Name	PayType	PayDate	Amount	Account No	Expiration Date	Status
SuperUser Account	CreditCard	9/1/2010 6:34:21 PM	$86.90	************1881	0112	Declined

The My Accounts module should be added to a portal page that only registered users can access. When a user clicks the "Select" link to the left of an order the order detail and payment history is displayed. When a user clicks the "Invoice" link to the left of the order a printable invoice is displayed for the user in a popup window. The print button at the bottom of the invoice will print the invoice.

Pay Now – This button will only be displayed for orders with the status of "Bill Me Later" giving customers the ability to pay for a "Bill Me Later" order.

When customer completes payment on the order the cart will send the following email confirmations:

- All manufacturers for all products ordered
- Customer
- Store admin

A.   My Account Module Settings

To view the My Account module settings hover your mouse over the drop down arrow in the upper corner of the My Account module container and choose "Settings".

Scroll to the bottom of the My Account Module Settings screen and click the plus sign next to the Smith.MyAccount Settings to expand the settings:

Hide Ship To Information – Check this box if you want to hide the display of the shipping fields in the my accounts module. The hide ship to information will typically be checked if you only sell soft goods in your store and your customer does not have shipping information

Hide Download Link – Check this box to hide the download link in the my accounts module. The download link if used by the user to download soft goods like software.

Update Link - Click the update link to save your changes.

LVIII.   Affiliate Tracking Module

The shopping cart provides support for Affiliate Tracking to sell your products. The cart has the option to store affiliate id in order table on successful purchase. The cart tracks Affiliate purchases giving you the ability to pay out commissions to your affiliates in a multi level marketing (MLM) model.

A.   Creating a new Vendor and Affiliate in DNN

1) Set up a Vendor in DNN for each affiliate or incoming link you want to track. A Vendor is a website or company that links to your website.
    a. In DNN, navigate on "Admin > Vendors > Add New Vendor".
    b. Set up your Vendor details. Make sure you enter your own email address so you receive the email with the affiliate id.
    c. Click "Update" to continue.

2) Set up an Affiliate association for this Vendor in DNN
    a. At the bottom of the Vendor detail screen you will see the "Affiliate Referrals" heading.
    b. Click on "Add New Affiliate".

3) Generating a unique affiliate id and referral URL. After you create a new vendor and affiliate in dnn you should receive an email that looks like this:

Dear Affiliate,

Your account for the Affiliate Program has been created.

To begin earning commission, please use the following URL to link to our site:

http://www.yourwebsite.com/Default.aspx?AffiliateId=27

B.   Affiliate Tracking Setup

Adding affiliate tracking capabilities to your website is one of the most effective ways to achieve more sales, more traffic and better search engine ranking. DNN and SmithCart support the following affiliate tracking campaign types:

1. Click Thru

An affiliate links to our website using the following link:

http://www.yourwebsite.com/?AffiliateId=12

This type of affiliate link and click thru will generate traffic to our website. You may or may not decide to pay commission for this type of referral.

2. Click Thru to Acquisition

An affiliate links to our website using the following link:

http://www.yourwebsite.com/?AffiliateId=12

This type of affiliate link will track click thru and if the user registers on your site. You may or may not decide to pay for this type of referral.

3. Click Thru to Purchase – Product Listing Page or any page on your website

To track affiliate purchases, the affiliate tracking module needs to be added to any page except the shopping basket page and the product detail page. Affiliate tracking on the shopping basket page and the product detail page will work automatically without the Affiliate Tracking module simply by passing the affiliateid in the url.

Follow these steps to add and configure the Affiliate Tracking module to your page:

A. In the DNN control panel add the Smith.AffiliateTracking module to any pane on your page.

B. Edit the settings in the affiliate tracking module.

To view the affiliate tracking module settings hover your mouse over the drop down arrow in the upper corner of the affiliate tracking module container and choose "Settings"

Scroll to the bottom of the Affiliate Tracking Module Settings screen and click the plus sign next to the Smith.AffiliateTracking Settings:

The "Affiliate Tracking Id" is defaulted to "AffiliateId". The "AffiliateId" is the label that identifies the affiliate in the url highlighted in yellow below. In most cases you will leave the default.

https://www.yourwebsite.com/ShopOnline/tabid/60/Default.aspx?AffiliateId=20

Hiding the Affiliate Tracking Module on your page

The purpose of the Affiliate Tracking module is to collect data on how many times your affiliates have sent customers to your website and is the module should not be viewable by the user on your website. After you place the Affiliate Tracking module on your page you will need to hide it. To hide the Affiliate Tracking module navigate to "Page Settings" section of the Affiliate Tracking module settings. Under page settings uncheck "Display Container" and "Allow Print" so website users do not see the module on the page. Click update to save the changes.

Creating the URL for your Affiliate

To obtain the proper url for your affiliate to link directly to a page on your website follow these steps:

    A.   Navigate to the desired page on your website you want your affiliate to link to and copy and paste the url from the browser window

Example URL for the product listing screen:

https://www.yourwebsite.com/ShopOnline/tabid/60/Default.aspx?AffiliateId=20

Example URL for your home page:

https://www.yourwebsite.com/Default.aspx?AffiliateId=20

    B. In the example url above, substitute your AffiliateId that was assigned for the affiliate. The affiliateid can be found in the DNN Admin – Vendors screen.

    C. Send you affiliate your new link

4. Click Thru to Purchase – Cart Screen or Product Detail Page

Linking to the Shopping Basket Screen

To obtain the proper url for your affiliate to link directly to the shopping basket screen and automatically add a product to the cart follow these steps:

A. Navigate to your cart screen and copy and paste the url from the browser window

Example URL:

https://www.yourwebsite.com/ShopOnline/tabid/38/ctl/Cart/mid/370/Default.aspx?AffiliateId=20&productid=1

B. In the example url above, substitute your productid and affiliateid that was assigned for the product and affiliate. The productid can be found in the manage product screen and affiliateid can be found in the DNN Admin – Vendors screen.

C. Send you affiliate your new link

This type of affiliate link will automatically add your product to the shopping cart and also will track if the user successfully purchases your product.

Linking to the Product Detail Screen

To obtain the proper URL for your affiliate to link directly to the product detail follow these steps:

D. Navigate to your product detail screen for the product that you want your affiliate to link to and copy and paste the URL from the browser window

Example URL:

https://www.yourwebsite.com/ShopOnline/tabid/38/ctl/ProductDetails/mid/370/ProductID/1/Default.aspx?AffiliateId=20

E. In the example url above, substitute your affiliateid that was assigned for the affiliate. The affiliateid can be found in the DNN Admin – Vendors screen.

F. Send you affiliate your new link

C.   Commission Payout

Affiliates can link to any page on your site and the affiliate tracker module will track the affiliate id all the way through check out/purchase and saves the affiliate id with the order in the database.   To pay out commissions to your affiliates you have the following options:

1. The old fashioned way with paper checks and snail mail

2. Use your virtual terminal provided by your payment gateway to electronically deposit the affiliate commissions directly to your affiliates bank account via ACH.

3.   Smith Cart is integrated with STP Systems Multi-Tier Affiliate Manager for DNN. You can use the cart to take orders and use the STP module to manage your MLM business and payout commissions. For more information on the STP Affiliate Manager module click here.

If an affiliate links to your website and the customer purchases a product in your store you should pay commissions to affiliates. The typical affiliate commission is between 10 and 20 percent.

The Smith Cart can easily be private labeled with your affiliate's logo and custom colors to meet your online marketing strategy needs.

D.   STP Affiliate Manager Integration

The STP Affiliate Manager has a scheduler that periodically reads Smith_Order and OrderDetail tables. The STP Affiliate Manager tracks approved paid orders from Smith Cart, once the STP Affiliate Manager detects a new paid order in Smith Cart it checks who is a sponsoring affiliate of the purchaser and assign commission according to the STP Affiliate Manager "Event" settings. In addition to "built-in integration" the STP Affiliate Manager module allows adding custom commission "Events". Custom Events have to be triggered according to specific user action (for instance let's say business wants to pay $1 commission for every user who opts in to email subscription). In this case administrator has to create custom Event (configure properties) then attach JavaScript code snippet (generated automatically) that raises the Event on the subscription Signup button.

Smith Cart is integrated with the STP single level and multi level (MLM) Affiliate Manager modules

Click here for more information on the STP Single Level Affiliate Manager module

Click here for more information on the STP Multi Level (MLM) Affiliate Manager module

E. ClickBank Integration

The Affiliate Tracking module is integrated with the ClickBank instant notification service to receive postbacks from ClickBank for sale and refund transactions.

The ClickBank Instant Notification service is triggered every time a transaction is created or an action is taken upon a transaction in your ClickBank account. The primary flow involves the following steps:

- An action occurs in the ClickBank system (ex sale, refund, etc)
- ClickBank posts FORM parameters to a URL you specify
- ClickBank observes the server response
- The Smith Affiliate Tracking module processes the variables posted from ClickBank and saves the data to the customer, order and payment history tables.
- DNN account created for user
- User is added to portal roles you specify in product setup
- Automated email is sent to the user notifying them of their userid, password and a message that they have been added as a member of your portal.

The following is the ClickBank notification service that is integrated with the Smith Affiliate Tracking module:

http://www.clickbank.com/help/account-help/account-tools/instant-notification-service/

LIX. Language Localization

The purpose of the language localization is to allow you to define different languages in your store. Smith Cart provides the ability to present all text on the user facing screens in multiple languages, to increase international sales. The cart admin can choose which of the installed languages to display the content in.

By default Smith Cart displays all content in English. For a full description of how to enable different languages or install language packs in your DNN portal please refer to the DotNetNuke® User Guide.

A.   How To Localize Your Store

The following steps outline how to install Smith Cart language packs to localize the cart in your desired language:

1. Make sure you have Smith Cart installed.

2. Login to your portal as Administrator and navigate to the DNN Admin menu – Languages option.

3. Select the language you would like to use in your store from the drop down list. If the language for your specific locale is not listed in the dropdown list you will need to login as "Host" and add your desired language pack from DNN Host - Languages menu option. Once you have installed additional language packs within your portal those languages will be available from the dropdown list.

4. Download the appropriate Smith Cart language pack here http://www.smith-consulting.com/forums/smithcartlanguagepacks.aspx , unzip and copy the resx files to the following folders.

    - Smith.BuyNow module - \desktopmodules\Smith.BuyNow\App_LocalResources
    - Smith.ProductDetail module - \desktopmodules\Smith.ProductDetail\App_LocalResources
    - Smith.MiniCart module - \desktopmodules\Smith.MiniCart\App_LocalResources
    - Smith.Categories module - \desktopmodules\Smith.Categories\App_LocalResources
    - Smith.FeaturedProducts module - \desktopmodules\Smith.FeaturedProducts\App_LocalResources
    - Smith.MyAccounts module - \desktopmodules\Smith.MyAccounts\App_LocalResources

Note: If a Smith Cart language pack is not available on the downloads page for your language please email support@smith-consulting.com and we will create one and post it to the downloads page. You can also translate the resx files to your language using the google language translator or using your favorite editor open the resx files listed in the folders above and translate into your desired language and "save as" when complete. Translated text should only be added to the "Value" column of the resource file.   Make

sure that you do not over write the existing resx files and "save as" a different file name. When saving your resx files make sure you use the naming conventions described in section below titled "Resource File (Resx) Naming Conventions".

B.   Resource File (Resx) Naming Conventions

After you have translated the label values in the resx files you will need to save the files in the proper naming convention in order for the language localization to work correctly.

For example, if you have translated the Step1.ascx.resx resource file in the \desktopmodules\Smith.BuyNow\App_LocalResources folder you will need to save it according to the following file naming convention that applies to your locale/language.

Step1.aspx.resx. This is the default local resource file (the fallback resource file) if no language match is found.

Step1.aspx.es.resx. This is the resource file for Spanish.

Step1.aspx.es-mx.resx. This is the resource file for Spanish (Mexico) specifically.

Step1.aspx.fr-fr.resx. This is the resource file for French.

Step1.aspx. de-de.resx. This is the resource file for German.

The base name of the file matches the page file name, followed by a language and culture name, and ending with the extension .resx.   For a complete list of culture names, see the following link http://sharpertutorials.com/list-of-culture-codes/

You are welcome to contribute your translated resx files back to the Smith Cart community and they will be included in the next build of the cart so you can take advantage of future upgrades. You can email a zip file of your translated resx files to support@smithcart.com.

The steps above localize the static text on the pages, to localize the dynamic database driven product data stored in the database navigate to the store admin menu and click on the following button:

Localization

The following screen will be displayed:

Product Language Localization Management

Select a Language: en-US

Select a Product: Product One of Cat One

Product Name:

Tab #1:

Description #1:

Tab #2:

Description #2:

Tab and Description 3-5 are also fields on the localization management screen above.

The language packs are available on the cart downloads page:

- German

- Italian
- Spanish
- Other language packs available on request!

LX. Licensing

Smith Cart is licensed per domain name and will run on portal alias "localhost" without a license key. You will need a license key to run it from other portal aliases without displaying the trial message.

To purchase a license visit our online store at
 https://www.smith-consulting.com/buynow.aspx

If you have purchased Smith Cart already you can request a license here
http://www.smith-consulting.com/forums/licenserequest.aspx

LXI. Upgrading or uninstalling Smith Cart

If you are running a version earlier than 2.44.08 of the Smith Cart and want to upgrade to the latest version please follow these steps. If you are running version 2.44.08 or above you can install the new module and the upgrade will happen automatically.

1. It's a good idea to reset Microsoft IIS webserver prior to uninstalling modules as IIS caches files sometimes.
2. Navigate to the host menu – module definitions page.
3. Click the pencil next to the Smith Buy Now to edit the module
4. Locate the following screen:

5. Make sure the delete files checkbox is checked and click the uninstall link

Please note: In some cases DNN will not uninstall the SQL tables and stored procedures when uninstalling a module from the host settings. Check your DNN database and make sure that all the tables and stored procedures with the prefix of "Smith" have been deleted. If all the tables and stored procedures with the prefix of "Smith" have not been deleted then please follow these additional steps:

6. In SQL Server – delete all the tables stored procedures with the prefix of "Smith" DNN does not delete these in some cases.
7. Install the new Smith Buy Now module from the DNN – Host – ModuleDefinitions menu.
8. Reset IIS – release the cache again
9. Add the Smith Buy Now module to your DNN page and configure the settings and products.

LXII. Setting up SSL

Before you execute the steps below you must have an SSL certificate installed on your server. Contact your hosting to request SSL be installed on your website.

1. Login to DNN with your host account
2. Navigate to Admin > Site Settings
3. Navigate to Advanced Settings > SSL Settings
4. Check off the SSL Enabled option - Indicates an SSL Certificate has been installed for this site
5. Check off the SSL Enforced option - When this option is set, Pages which are not marked as secure will not be accessible with SSL (HTTPS)

6. SSL URL (Optional) – This option is only needed if you are on a shared hosting platform. Specify a URL which will be used for secure connections for this site.
7. Standard URL – If an SSL URL in item 6 above, you will also need to specify a Standard URL for unsecure connections (i.e. http://www.yourdomain.com).
8. Click on Update to save the changes.

The steps above will configure the SSL settings for your DNN portal, next you need to indicate what pages you want SSL turned on. Pages with SSL enabled will load a bit slower than non SSL pages due to the overhead associated with the encryption so its recommended that you only enable SSL on pages that have sensitive information.

1. Navigate to Admin > Page Settings
2. Select the page you want to secure and click on Edit Selected Page
3. Navigate to Advanced Settings > Other Settings
4. Check off the option for Secure
5. Click update to save the changes.

LXIII.   PCI Compliance

Security of your customer's personal information and credit card data is number one priority for Smith Consulting and our shopping cart was built to be fully PCI compliant. The Payment Card Industry Data Security Standard (PCI DSS) is a set of requirements designed to ensure that ALL companies that process, store or transmit credit card information maintain a secure environment. The PCI DSS is administered and managed by the PCI SSC www.pcisecuritystandards.org an independent body that was created by the major payment card brands (Visa, MasterCard, American Express, Discover and JCB.).

1. Credit Card Encryption – Cart supports stores or credit card numbers in the database using RSA 256 bit encryption which is an approved encryption by PCI.

2. Card Security Code – CVV/CID on the back of a credit card is collected from the user and sent to the payment gateway for authorization but is never stored in the database.

3. SSL – Cart fully supports SSL

4. Cart supports validation for SQL injection and cross site scripting to prevent unauthorized access to the database