



MerchantPartners

**Online Commerce Suite™
Web Cart Guide**



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Overview

Online Commerce Suite is a Web-based payment gateway that allows you to process secure credit card and electronic check payments for goods and services over the Internet. This document describes the Web Cart feature of the Online Commerce Suite, a full featured shopping cart and order processing system that's powerful yet simple to use.

What's in This Guide

The Online Commerce Suite Web Cart Guide is designed to assist you in the steps required to set up your online shopping cart.

There are three main components to selling online with Web Cart:

- **Your Web Site:** Your customers will first go to your web site to view product information, descriptions and pricing. If they decide to make a purchase, they click on "Buy It" links or buttons that will add the item to their shopping cart. When they are done shopping, they click on the "Proceed to Checkout" button.
- **Web Cart shopping cart and order status site:** The Web Cart shopping cart is where your customers can view their shopping cart items, pay and checkout, and also view order status. It is hosted on our secure servers --- you do not need to install any special software or SSL certificates on your web site.
- **Web Cart Admin:** The Web Cart Admin site is a menu within the Online Merchant Center that allows you to customize your store, add or change products, configure shipping and payment options, and process your orders.

How to Comment on This Guide

Every effort has been made to produce an accurate and easy to understand the Web Cart Guide.

Contact Information

For more information about Online Commerce Suite, refer to the following:

Customer Service

If you have problems with this document, or find that the instructions are incorrect, incomplete, or inadequate, please let us know.

Send your comments to support@merchantpartners.com

Phone: (866) 242-9933

Documentation

Web Site URL: https://www.onlinemerchantcenter.com/mpartners/html/user_manuals.html

Certified Networks

Web Site URL: <https://www.onlinemerchantcenter.com/mpartners/html/networks.html>

Hardware Compatible List

Web Site URL: <https://www.onlinemerchantcenter.com/mpartners/html/equipment.html>

Purchasing and Activating your Web Cart



The first step in setting up your Web Cart is activation. From the Online Merchant Center menu, select the "Web Cart" menu item in the Shopping Cart Section. If you have not purchased and activated your Web Cart, you will be asked select a Web Cart plan (25, 100, 500, or 5000 products). Select the plan that best fits your online store. You can always change your plan at a later date if your needs change. Press the Submit button to purchase the plan and activate your store.

For more information regarding Web Cart plans and pricing, contact your reseller or Customer Service.

Web Cart Administration

After your Web Cart has been activated, the following options will be displayed when you select the Web Cart menu:

Web Cart Options	
Configure your Web Cart	View your cart configuration, add / edit / delete products from your catalog, manage your orders, etc.
Upgrade your Web Cart	Use this option to upgrade your Web Cart to a different plan. Your current plan allows for 500 products.
Web Cart Guide	View the Web Cart documentation. This guide provides instructions on topics such as how to configure your Web Cart, how to add products to your catalog, how to create "Buy It" links that you can paste into your web site, and how to manage your customers and orders.
Demo Store	Our demo store provides an example of how to use web links and allows you to walk through a test order.
<input type="button" value="Submit"/>	

Click on the "Configure your Web Cart" option to enter the Web Cart Administration menu. The following screen will be displayed:

Web Cart Admin																																																															
<div>Configuration</div> <div>My Store</div> <div>Customer Details</div> <div>Shipping/Packaging</div> <div>E-Mail Options</div> <div>Download</div> <div>Catalog</div> <div>Modules</div> <div>Customers</div> <div>Locations / Taxes</div> <div>Reports</div> <div>Tools</div>	<div>My Store</div> <table><thead><tr><th>Title</th><th>Value</th><th>Action</th><th>Store Name</th></tr></thead><tbody><tr><td>Store Name</td><td>Jack's Fish Shop</td><td>▶</td><td>Please make any necessary changes</td></tr><tr><td>Store Owner</td><td>Jack Jones</td><td>ⓘ</td><td></td></tr><tr><td>E-Mail Address</td><td>demostore@merchantpartners.com</td><td>ⓘ</td><td>Store Name</td></tr><tr><td>E-Mail From</td><td>demostore@merchantpartners.com</td><td>ⓘ</td><td>The name of my store</td></tr><tr><td>Country</td><td>United States</td><td>ⓘ</td><td><input type="text" value="Jack's Fish Shop"/></td></tr><tr><td>Zone</td><td>California</td><td>ⓘ</td><td><input type="button" value="update"/> <input type="button" value="cancel"/></td></tr><tr><td>Send Extra Order Emails To</td><td></td><td>ⓘ</td><td></td></tr><tr><td>Display Cart After Adding Product</td><td>true</td><td>ⓘ</td><td></td></tr><tr><td>Allow Guest To Tell A Friend</td><td>false</td><td>ⓘ</td><td></td></tr><tr><td>Store Address and Phone</td><td>Jack's Fish Shop 12424 Wilshire Blvd. Suite 1170 Los Angeles, CA 90025 USA 310-826-2323</td><td>ⓘ</td><td></td></tr><tr><td>Show Category Counts</td><td>true</td><td>ⓘ</td><td></td></tr><tr><td>Tax Decimal Places</td><td>0</td><td>ⓘ</td><td></td></tr><tr><td>Display Prices with Tax</td><td>false</td><td>ⓘ</td><td></td></tr><tr><td>Store URL</td><td>http://www.onlinemerchantcenter.com/jacksfish/index.htm</td><td>ⓘ</td><td></td></tr></tbody></table>			Title	Value	Action	Store Name	Store Name	Jack's Fish Shop	▶	Please make any necessary changes	Store Owner	Jack Jones	ⓘ		E-Mail Address	demostore@merchantpartners.com	ⓘ	Store Name	E-Mail From	demostore@merchantpartners.com	ⓘ	The name of my store	Country	United States	ⓘ	<input type="text" value="Jack's Fish Shop"/>	Zone	California	ⓘ	<input type="button" value="update"/> <input type="button" value="cancel"/>	Send Extra Order Emails To		ⓘ		Display Cart After Adding Product	true	ⓘ		Allow Guest To Tell A Friend	false	ⓘ		Store Address and Phone	Jack's Fish Shop 12424 Wilshire Blvd. Suite 1170 Los Angeles, CA 90025 USA 310-826-2323	ⓘ		Show Category Counts	true	ⓘ		Tax Decimal Places	0	ⓘ		Display Prices with Tax	false	ⓘ		Store URL	http://www.onlinemerchantcenter.com/jacksfish/index.htm	ⓘ	
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Store Name	Jack's Fish Shop	▶	Please make any necessary changes																																																												
Store Owner	Jack Jones	ⓘ																																																													
E-Mail Address	demostore@merchantpartners.com	ⓘ	Store Name																																																												
E-Mail From	demostore@merchantpartners.com	ⓘ	The name of my store																																																												
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The following sections describe the basic features you'll need to configure your Web Cart and start accepting online orders.

My Store

This section describes general information about your store, such as the store name, mailing address, email addresses, etc.

Field	Description
Store Name	Enter the name of your store here
Store Owner	Enter the name of the store owner here
E-Mail Address	Enter the e-mail address of the store owner here
E-Mail From	Enter the address you want to appear in the 'From' field of emails sent by Web Cart
Country	Enter the country that your store is based in
Zone	Enter the zone your store is in. This is needed for proper tax setup
Send Extra Order Emails To	Enter any emails that you would like an extra copy of the order to be sent to. Use the format: User Name <email@somewhere.com>
Display Cart After Adding Product	When set to true, the customer is taken to the shopping cart page after each item is placed in the shopping cart. When set to false, the customer remains on the product page after the item is added.
Allow Guest To Tell A Friend	When enabled, this will allow any user to send email to their friends about any of your products using the 'Tell a friend' box. When disabled, only registered members can 'Tell a friend'
Store Address and Phone	The information here will be seen by the customer if you allow the Check/Money order option during checkout. This information will also be displayed on invoices and packing slips generated from the Orders menu.
Show Category Counts	This option turns category counts on/off in the category box in the catalog. It shows the quantity of products in a category when enabled.
Tax Decimal Places	How many decimal places you want to have in your tax percentage.
Display Prices with Tax	When on, this will automatically display all items prices with the tax included. When off, tax will only be shown during checkout.
Enable Catalog	When on, this option will display the product categories and search options on the shopping cart screen. Enable this option if you want Web Cart to be your main store home page. If you have all of the product information on your website and have buy it links on your web site, then you will probably leave this option turned off. If you are not sure which way to set this, go ahead and enable/disable the option, add some products to your shopping cart, and see which you prefer.
Website URL	Enter the URL of your store web site.
Continue Shopping at Website URL	This option controls what web page is displayed when your customers select the "Continue Shopping" button in the shopping cart. If True, your Website URL will be displayed. If False, the Web Cart catalog will be displayed (you also need to Enable Catalog if you set this option to False).

Images

This section allows you to customize the size of the product and category images that get displayed in the catalog and shopping cart.

Field	Description
-------	-------------

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Small Images Width	Width size of the product thumbnail images that are displayed in the shopping cart. Default is null, which specifies that the width will be automatically calculated based on the height
Small Images Height	Height size of the product thumbnail images that are displayed in the shopping cart.
Heading Image Width	Width size of the product category images that are displayed in the catalog. Default is null, which specifies that the width will be automatically calculated based on the height
Heading Image Height	Height size of the product category images that are displayed in the catalog.

Customer Details

When a customer proceeds to the checkout process, they are asked to either register as a new customer, or login as a returning customer. The following displays the screen that your customers will see:



The screenshot shows a web form titled "Welcome, Please Sign In". Below the title is a note: "Note: Your 'Visitors Cart' contents will be merged with your 'Members Cart' contents once you have logged in. [More Info]". The form is divided into two main sections: "New Customer" and "Returning Customer".

New Customer: This section includes a radio button labeled "I am a new customer." and a paragraph: "By creating an account at Jack's Fish Shop you will be able to shop faster, be up to date on an orders status, and keep track of the orders you have previously made." At the bottom of this section is a blue button with a right arrow and the text "Continue".

Returning Customer: This section includes a radio button labeled "I am a returning customer." and two input fields: "E-Mail Address:" and "Password:". Below the password field is a link: "Password forgotten? Click here." At the bottom of this section is a blue button with a question mark icon and the text "Sign In".

This section allows you to enable or disable some of the fields used in the customer registration form (the form that is displayed when a new customer registers at your site).

Field	Description
Gender	Male or Female
Date of Birth	Customer's date of birth
Company	Field to enter a company name
Suburb	Address field
State	State field

The following is a sample customer registration form with the default fields enabled:

My Account Information

NOTE: If you already have an account with us, please login at the [login page](#).

Your Personal Details * Required information

First Name:

Last Name:

E-Mail Address:

Company Details

Company Name:

Your Address

Street Address:

City:

State/Province:

Post Code:

Country:

Your Contact Information

Telephone Number:

Fax Number:

Options

Newsletter: ☐

Your Password

Password:

Password Confirmation:

Shipping / Packaging

This section allows you to some basic shipping options. More detailed shipping options (such as shipping methods and rates) are configured in the Shipping menu under the Modules menu.

Field	Description
Country Code	Select the Country from which the products will be shipped. This is the originating country that will be used to calculate shipping quotes.
Postal Code	Enter the Postal Code (ZIP) of the Store to be used in shipping quotes.
Maximum Package Weight	Enter the Maximum Package Weight you will ship. Carriers have a max weight limit for a single package. This is the common maximum for all.
Package Tare Weight	What is the weight of typical packaging of small to medium packages?
Larger packages - percentage increase	What is the extra amount you will charge for larger package. For 10% enter 10

Download

This section controls the 'Product Download' options of Web Cart. Customers who purchase a downloadable product from your store will be provided a download link after checkout that they can use to download the item. If you sell downloadable products, this is where you configure how Web Cart handles the process.

Field	Description
Enable download	Enable the products download functions.
Expiry delay (days)	Set number of days before the download link expires. 0 means no limit.
	Set the maximum number of downloads. 0 means no download authorized.

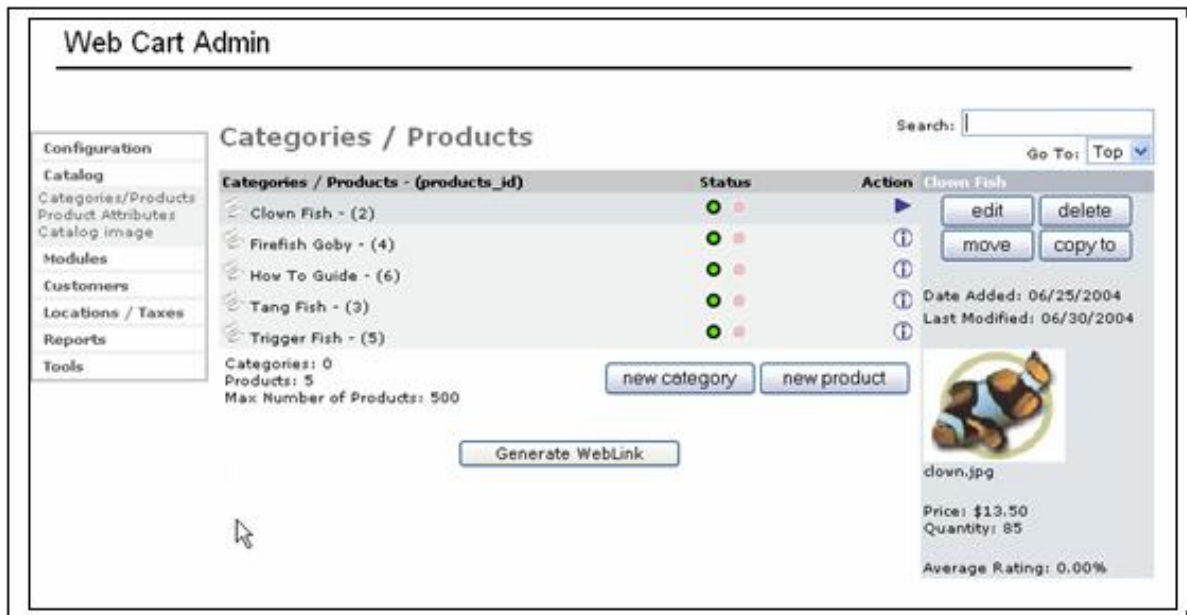
Maximum number of downloads

Catalog

The Catalog section is where you control your categories, products and product attributes. This section is very powerful and gives you a great deal of flexibility when creating and managing your inventory.

Categories/Products

This is where you add your categories and products to the catalog. Categories allow you to organize your product catalog into sections of common products to make them easier to navigate and keep track of. If you have more than a few products, we recommend first creating product categories, then creating products within each category. However, categories are not required --- if you only have a few products or if they are all similar in nature you can skip this section and proceed directly to the "Adding a New Product" section below.



Adding a New Category

In the main Categories/Products window, click the New Category button. The New Category right column will appear. The following fields need to be filled out:

Field	Description
Category Name	Enter the name of your new category.
Category Image	Enter the local path to your image or hit the browse button to locate the image on your computer.
Sort Order	This is how you control the display order of your categories. Enter a number here.

After you have entered in the appropriate information click the Save button. Your new category has been added. To add a subcategory, click on a main category, and then click the New Category button.

Adding a New Product

To add a new product, click the New Product button. Add the required info and you are on your way to populating your catalog. The following fields will need to be filled out:

Field	Description
Product Status	Mark whether this is in or out of stock.
Date available	Select the date this product will be available.
Products Manufacturer	Select the product's manufacturer from the dropdown list if you are using manufacturers.
Products Name	Enter the product name. There will be a field for each language you have enabled in your store.
Products Description	Enter the description of your product. You can use HTML in this field which allows you to be very flexible in how you create your product pages. You can add images to the description, tables, hyperlinks, just about all HTML
Products Quantity	If you are using inventory/stock tracking, enter how many are in stock.
Products Model	Enter the model or catalog number of your product.
Products Image	Enter the path to the image on your local computer, or click the browse button to look for it. This image will be uploaded to the server when you complete this process.
Products Price (Gross)	Set the products price here.
Products Price (Net)	Price with taxes (if the product is taxable)
Tax Class	Set whether the item is taxable or not.
Products Weight	Set the weight of the product. Do not leave this blank unless it is a download. If you leave it blank, your shipping modules will not work correctly on checkout.
Preview	Click this button to preview your product. On the next page, you click the Insert button to enter the new product into the database.

After completing the New Product form, press the Preview button. A page will be displayed allowing you to review and confirm your new product information. Click the **Insert** button to enter the new product into the database.

To quickly navigate through your categories, there is a Search box and a Go To box located in this section, on the far right, just below the page header. Use these to make your editing easier.

Generating Web Links

After creating products in your catalog, you need to add "Buy It" links to your web site that will allow your customers to add products to their shopping cart. Use the "Generate Web Link" button to automatically generate HTML links that you can copy and paste into your web site.

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To generate Web Links, press the "Generate Web Link" button. The following screen will be displayed:

Choose a Style for your "Buy Now" Buttons

Web Cart generates customized snippets of HTML code to create "Buy Now" buttons for your Web pages. These buttons should then be placed next to each product on a page, thus allowing customers to add products to their Web Cart shopping cart.

Select one of the button or link styles below, then click the "Generate HTML" button.

Text Link Styles Your Preference

- ☒ This clown fish costs \$12.95. [Buy Now](#)
- ☐ This clown fish costs \$12.95. [Buy It](#)
- ☐ This clown fish costs \$12.95. [Order It](#)
- ☐ This clown fish costs \$12.95. [Order Now](#)

Button Styles Your Preference

- ☐ This clown fish costs \$12.95.
- ☐ This clown fish costs \$12.95.
- ☐ This clown fish costs \$12.95.
- ☐ This clown fish costs \$12.95.

Buttons with Quantity Form Styles Your Preference

- ☐ This clown fish costs \$12.95. Qty:
- ☐ This clown fish costs \$12.95. Qty:
- ☐ This clown fish costs \$12.95. Qty:
- ☐ This clown fish costs \$12.95. Qty:

If you are an experienced Web designer you may design your own graphic button.

Select a link or button style, then press the Generate HTML button. A screen similar to the following will be displayed:

```
Product ID: 2
Product Name: Clown Fish

<A href="https://estores.merchantpartners.com/demo1/product_info.php?
action=purchase&products_id=2"> Buy Now </A>

Product ID: 3
Product Name: Tang Fish

<A href="https://estores.merchantpartners.com/demo1/product_info.php?
action=purchase&products_id=3"> Buy Now </A>

Product ID: 4
Product Name: Firefish Goby

<A href="https://estores.merchantpartners.com/demo1/product_info.php?
action=purchase&products_id=4"> Buy Now </A>

Product ID: 5
Product Name: Trigger Fish

<A href="https://estores.merchantpartners.com/demo1/product_info.php?
action=purchase&products_id=5"> Buy Now </A>

Product ID: 6
Product Name: How To Guide

<A href="https://estores.merchantpartners.com/demo1/product_info.php?
action=purchase&products_id=6"> Buy Now </A>
```

Shopping Cart Button

If you have **multiple items** for sale, then you need to place a Shopping Cart button at the top and bottom of the shopping area on each of your pages (see our Demo Store for a demonstration). This allows customers to either view the contents of their shopping cart, or pay and finish.

The button looks like this:

[View Cart/Checkout](#)

The HTML code to generate this button is:

```
<a href=https://estores.merchantpartners.com/demo1/shopping_cart.php>
View Cart/Checkout</a>
```

Copy and paste the HTML for each product link into the corresponding web pages on your web site. Also, copy the HTML for the "View Cart/Checkout" link to allow your customers to return to their shopping cart from your web site.

Product Attributes

This area of the catalog configuration is where you customize the attributes of your products. If you need to have different sizes, options, colors, and have different prices for each option, you have the ability to set this here.

On the main attributes page, you will see 3 sections:

- Product Options
- Option Values
- Product Attributes

Product Options

This section is where you create the options that you will need available for your products. This can be whatever you need, size, color, model, version, or whatever else you need. Creating options is very easy, just type the name of the option in the text box and click the 'insert' button. This creates a master options list, but does not assign values to those options. That is done in the next step.

Option Values

This section is the place to actually assign values to your options. This is a simple process as well. You will see a dropdown box with the options you created. Select the option you want from the dropdown, then type the value you want to assign in the text box next to it, and click 'insert.' That creates a value that is assigned to that particular option. Repeat this for all values that you will need.

Product Attributes

This section is where you actually assign the options that you have created, to your products. You will see a series of dropdown boxes. The first box contains all your products in your store. Select the product that you would like to set attributes for. The next box contains all the options that you have set, so select the option you want to add to the product. Then, in the next dropdown, select the value that you want to assign to the option. The next box is not a dropdown, but a text box. Enter the monetary value of the option, and in the final box, place a + or a - sign. This value determines whether Web Cart will add or subtract the value of the attribute from the base product cost. Finally, click the insert button, and the attribute will be assigned to the product.

Manufacturers

This section allows you to add and maintain the list of product Manufacturers for your catalog. You select a manufacturer when creating a new product. Also, customers can search and sort products by manufacturer in your catalog. To add a new manufacturer, click on the Insert button. The following fields are available:

Field	Description
Manufacturer Name	Product manufacturer name
Manufacturer Image	Upload an image that will be associated with this manufacturer

Specials

This section allows you to create limited time pricing for products. For example, you can activate a sale price for a product that will apply for all purchases until the sale ends (expiry date). To add a special price, click on the New Product button. The following fields are available:

Field	Description
Product	Select the product from the dropdown list of products in your catalog.
Special Price	Enter the sale price (i.e 24.99), or enter the percentage amount to deduct (i.e. 20%)
Expiry Date	Enter the date that the special price will end.

Catalog Image

Use this option to upload an image that will be displayed at the top of all of the shopping cart screens. The image should be a company logo or name.

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To upload an image, press the Insert button. An upload form will be displayed. Press the Browse button to browse your local computer for the image file you would like to upload.

When you have selected the file, press the Save button to upload and save the file to your Web Cart shopping cart.

Catalog Text

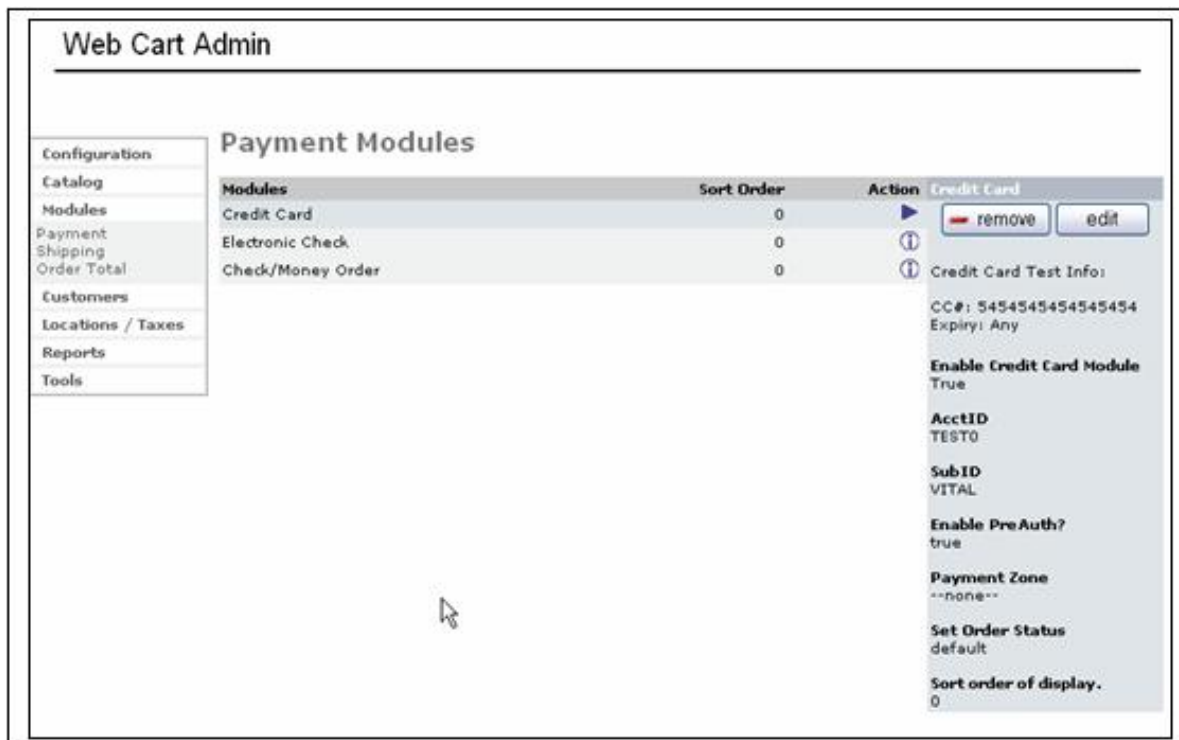
Use this option to customize the text that is displayed on your catalog screen.

Field	Description
Index Page	This is the title paragraph that is displayed at the top of your main catalog page.
Shipping Page	This text will be displayed when your customers select the "Shipping and Returns" menu option in the catalog. Use this option to describe your shipping options and return policy.
Privacy Page	This text will be displayed when your customers select the "Privacy Notice" menu option in the catalog. Use this option to describe your privacy policy.
Terms / Conditions Page	This text will be displayed when your customers select the "Conditions of Use" menu option in the catalog. Use this option to describe your terms and conditions for use of your web site and products.

Modules

Web Cart comes standard with several payment and shipping modules. This section of the administration tool allows you to enable, disable, and configure your modules. This is where you select what payment methods you will have at your store, and what shipping options are available.

More modules are being added all the time, so check this section for additional updates. If there is a module that is not available that you would like added, contact Customer Service and we will look into adding it.



Payment

Your Web Cart comes pre-configured with three payment types:

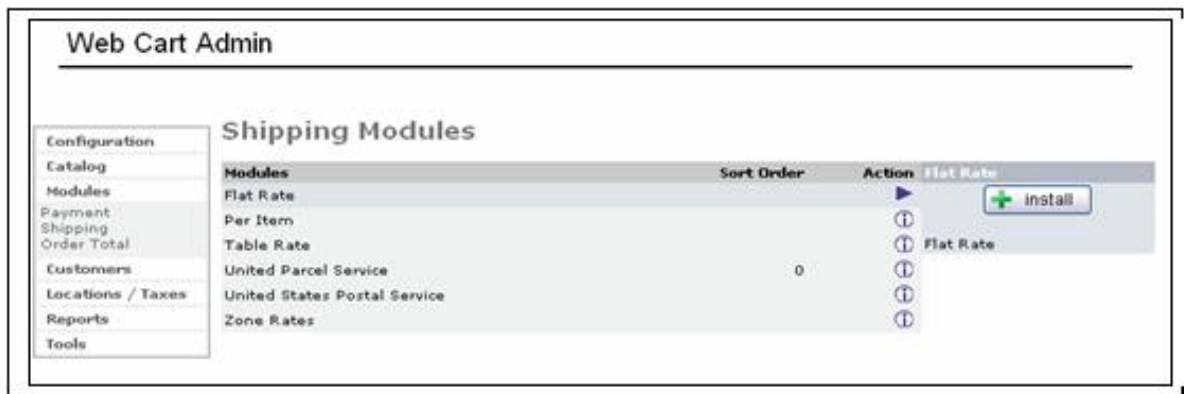
- Credit Card
- Electronic Check
- Check / Money Order (for offline payments)

The Credit Card and Electronic Check types are already configured to work through your payment gateway account --- no additional configuration should be necessary. To deactivate any of the payment types, select the option and press the Remove button.

Shipping

On this page, you will see a list of all currently installed shipping modules in your store. To the right of each you will see a green icon and a red icon. To activate a module, click the green icon next to it. To deactivate a module, click the red icon next to it.

Once a shipping module is active, you may have to configure that module with certain required information. If this is needed, click the shipping module, then click the Edit button in the right column. All available options for that module will be displayed.



Flat Rate

Use this module if you want to use a flat rate shipping rate per order. The following configuration options must be set:

Field	Description
Enable Flat Shipping	Set this to true to enable this module.
Shipping Cost	Set the rate you want to charge per order.
Tax Class	Set this to the tax class you want to use for this shipping method, or leave it set to none if you do not want to tax the shipping charge.
Shipping Zone	If you set this to a zone, this method will only be available to orders shipping to that zone.
Sort Order	This sets the sort order of your shipping methods during checkout. If you have more than one shipping method, set this to a non zero quantity. Lower numbers defined here will appear higher/first on the checkout shipping page.
Update	Always click this button to save your changes.

Per Item

Use this module to set a 'Per Item' shipping charge. Set a base shipping rate, and that rate will be multiplied by the number of items that the customer has in their shopping cart. The following options must be set:

Field	Description
Enable Item Shipping	Set this to true to enable this module.
Shipping Cost	Set the rate you want to charge per item purchased.
Handling Fee	Set the amount you want to charge for handling. This can be set to zero to deactivate the handling fee.
Tax Class	Set this to the tax class you want to use for this shipping method, or leave it set to none if you do not want to tax the shipping charge.
Shipping Zone	If you set this to a zone, this method will only be available to orders shipping to that zone.
Sort Order	This sets the sort order of your shipping methods during checkout. If you have more than one shipping method, set this to a non zero quantity. Lower numbers defined here will appear higher/first on the checkout shipping page.
Update	Always click this button to save your changes

Table Rate

This shipping method allows you to set so called table rate shipping. This module allows you to set whether shipping will be charged based on weight or quantity. Further, you define shipping price breaks based on weight or quantity amounts. The following options need to be set for this module:

Field	Description
Enable Table Method	Set this to true to enable this module.
Shipping Table	Set this option by following the example provided below.
Table Method	Set this to weight or price .
Handling Fee	Set the amount you want to charge for handling. This can be set to zero to deactivate the handling fee.
Tax Class	Set this to the tax class you want to use for this shipping method, or leave it set to none if you do not want to tax the shipping charge.
Shipping Zone	If you set this to a zone, this method will only be available to orders shipping to that zone.
Sort Order	This sets the sort order of your shipping methods during checkout. If you have more than one shipping method, set this to a non zero quantity. Lower numbers defined here will appear higher/first on the checkout shipping page.
Update	Always click this button to save your changes.

Table Rate example: A store owner wants to charge \$10 for orders weighing up to 20 lbs. Any orders over 20 lbs, but under 40 lbs are charged \$18. To set this up using the table rate shipping method, the following must be entered into the 'Shipping Table' field of this module: **25:10.00,40:18.00**

United Parcel Service

If you want to ship using UPS, enable this module. It is also important to note that in order for shipping calculations to be done correctly, you must set the zip/postal code of your store correctly in the Configuration section. The following options must be set:

Field	Description
Enable UPS Shipping	Set this to true to enable this module.
UPS Pickup Method	This should be set to the method your UPS packages are picked up. Your options are CC - Customer Counter, RDP - Daily Pickup, OTP - One Time Pickup, LC - Letter Center, OCA - On Call Air
UPS Packaging	Set this to the UPS Packaging method that you use. The following options are available CP - Your Packaging, ULE - UPS Letter, UT - UPS Tube, UBE - UPS Express Box
Residential Delivery	Set this to either RES or COM to have the module quote a residential or commercial shipping rate.
Handling Fee	Set the amount you want to charge for handling. This can be set to zero to deactivate the handling fee.
Tax Class	Set this to the tax class you want to use for this shipping method, or leave it set to none if you do not want to tax the shipping charge.
Shipping Zone	If you set this to a zone, this method will only be available to orders shipping to that zone.
Sort Order	This sets the sort order of your shipping methods during checkout. If you have more than one shipping method, set this to a non zero quantity. Lower numbers defined here will appear higher/first on the checkout shipping page.
Update	Always click this button to save your changes.

United States Postal Service

To use USPS module, you first need an account with the USPS. If you do not have an account, you cannot use this module. The following options must be configured:

Field	Description
Enable USPS Shipping	Set this to true to enable this module.
Enter the USPS User ID	This should be set to your USPS user ID
Enter the USPS Password	This should be set to your USPS password
Which server to use	Set this to either 'test' or 'production'
Handling Fee	Set the amount you want to charge for handling. This can be set to zero to deactivate the handling fee.
Tax Class	Set this to the tax class you want to use for this shipping method, or leave it set to none if you do not want to tax the shipping charge.
Shipping Zone	If you set this to a zone, this method will only be available to orders shipping to that zone.
Sort Order	This sets the sort order of your shipping methods during checkout. If you have more than one shipping method, set this to a non zero quantity. Lower numbers defined here will appear

	higher/first on the checkout shipping page.
Update	Always click this button to save your changes.

Customers

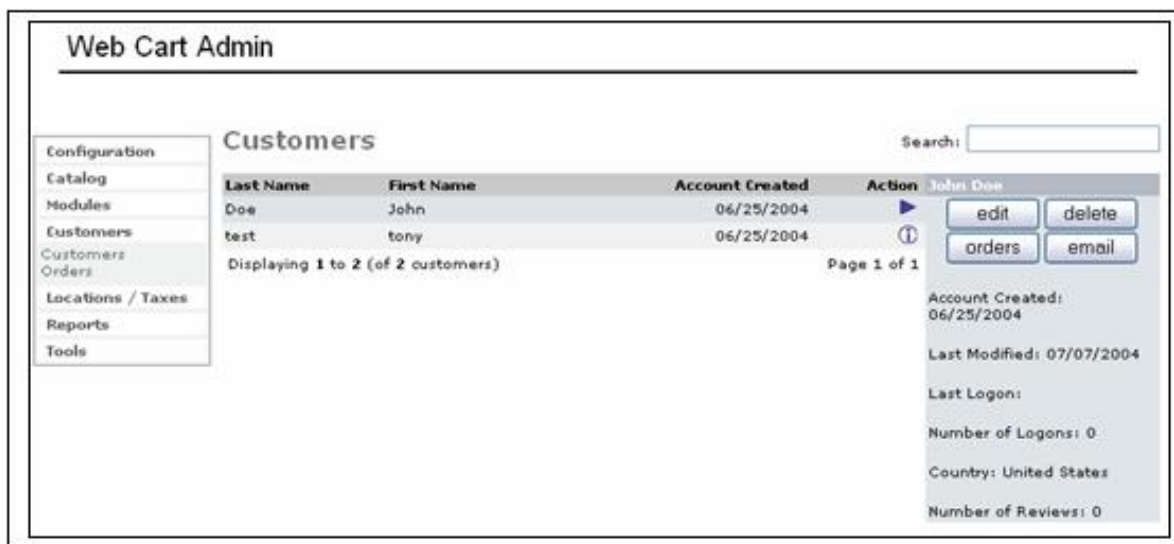
The Customers section allows you to manage your Web Cart customers and orders. Each time a customer registers, their information will appear in the Customers menu. Each time a customer places an order, the order will appear in the Orders menu.

Customers menu

From the Customers menu, you can do the following:

- View a list of customers that have registered at your site
- Edit a customer's information
- View orders for a particular customer
- Send an email to a customer
- Delete a customer

The following is a sample Customers menu screen:



To view and edit customer information, click on a customer and then press the "Edit" button. The following screen will be displayed:

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Customers

Personal

First Name: * Required

Last Name: * Required

E-Mail Address: * Required

Company

Company name:

Address

Street Address: * Required

Post Code: * Required

City: * Required

State:

Country:

Contact

Telephone Number: * Required

Fax Number:

Options

Newsletter:

Press the Update button to save your changes.

The following is a sample welcome email that is sent to your customer when they register in your Web Cart:

Dear David,

We welcome you to Jack's Fish Shop.

You can now take part in the various services we have to offer you.
Some of these services include:

Permanent Cart - Any products added to your online cart remain there until you remove them, or check them out.

Address Book - We can now deliver your products to another address other than yours! This is perfect to send birthday gifts direct to the birthday-person themselves.

Order History - View your history of purchases that you have made with us.

Product Reviews - Share your opinions on products with our other customers.

For help with any of our online services, please email the store-owner:
store@jacksfishshop.com

Note: This email address was given to us by one of our customers. If you did not sign up to be a member, please send an email to:
store@jacksfishshop.com

Orders menu

From the Orders menu, you can do the following:

- View a list of orders
- View and edit the status of an Order (Pending, Processing, or Delivered)

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- Print an invoices or packing slip
- Delete an order

The following is a sample Orders menu screen:

Customers	Order Total	Date Purchased	Status	Action
tony test	\$10.75	06/25/2004 15:14:37	Pending	
tony test	\$9.95	06/25/2004 15:12:57	Pending	
tony test	\$9.95	06/25/2004 15:04:44	Pending	
tony test	\$9.95	06/25/2004 14:52:42	Pending	
tony test	\$29.95	06/25/2004 14:48:19	Pending	
tony test	\$9.95	06/25/2004 14:46:27	Pending	
tony test	\$9.95	06/25/2004 14:43:45	Pending	
tony test	\$9.95	06/25/2004 14:39:22	Pending	
tony test	\$42.16	06/25/2004 14:37:21	Pending	
tony test	\$75.28	06/25/2004 14:34:27	Processing	
tony test	\$69.17	06/25/2004 14:31:37	Processing	
tony test	\$29.95	06/25/2004 14:28:18	Processing	
tony test	\$9.95	06/25/2004 14:24:55	Delivered	
tony test	\$46.90	06/25/2004 14:15:03	Delivered	

Displaying 1 to 14 (of 14 orders) Page 1 of 1

Editing an Order

To edit an order, select the order from the order list and press the Edit button. The screen similar to the following will be displayed:

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Orders

back

Customer:

tony test
 123 test
 los angeles, California
 90025
 United States

Shipping Address:

tony test
 123 test
 los angeles, California
 90025
 United States

Billing Address:

tony test
 123 test
 los angeles, California
 90025
 United States

Telephone Number:

3101234567

E-Mail Address:

tony@atcbank.com

Payment Method:

Credit Card

Products	Model	Tax	Price (ex)	Price (inc)	Total (ex)	Total (inc)
1 x How To Guide - Version: File Download		8%	\$9.95	\$9.95	\$9.95	\$9.95

Sub-Total: \$9.95

Tax: \$0.80

Total: \$10.75

Date Added	Customer Notified	Status	Comments
06/25/2004 15:14:37	<input checked="" type="checkbox"/>	Pending	

Comments

Status: Pending

update

Notify Customer: ☒

Append Comments: ☒

invoice

packing slip

back

From the Edit screen you can do one of the following:

Field	Description
Comments	Add comments into the comment field, then press the Update button. If you have the Notify Customer option checked, an email with your comments will be sent to the customer.
Status	Change the status of the Order. Three options are available: Pending (default for new orders), Processing, and Delivered.
Notify Customer	Check this option if you would like an email to automatically be sent to the customer each time you make a change to the status or comments.
Append Comments	Check this option to append comments to previously issued comments. Otherwise, new comments will overwrite previous comments.
Invoice	Press this button to display a printable invoice for this order.
Packing Slip	Press this button to display a printable packing slip for this order.
Update	Press this button to save any changes you made to the order.
Back	Press this button to return to the Orders list without saving changes.

Locations / Taxes

The Locations / Taxes section allows you to configure the geographic locations that you will ship products to, and the tax rates (optional) that will charged for your products.

Countries

The countries menu allows you to configure the countries that are available when a customer enters their shipping address. This list is pre-populated with a complete list of all countries. If you prefer to not make certain countries available to your customers, delete them from the list.

Zones (states)

The Zones menu allows you to configure the Zones within a country. Typical zones are states or provinces. This list is pre-populated with a complete list of states and provinces. If you prefer to not make certain zones available to your customers, delete them from the list.

Tax Zones

Tax zones are configured to correspond to one or more geographic zones. Configure a separate Tax Zone for each region that will be charged a different tax rates. For example, if each state has a unique tax rate for the products you sell, you will need to create a tax zone for each state and then setup a Tax Rate that applies to the corresponding Tax Zone.

To create a new Tax Zone, do the following:

1. Under Locations/Taxes, click on the "Tax Zones" menu
2. Click on the "new zone" button.
3. Fill out the Tax Zone Form:
 - ◆ Zone Name: example "CA"
 - ◆ Description: example "California".
4. Press the Insert button. The tax zone "CA" will be added to the list.
5. You now need to assign geographic zones to the tax zone you just created. Click on the tax zone that you just created (example "CA") in the list and press the Insert button.

Country	Zone	Action
United States	California	

Displaying 1 to 1 (of 1 countries) Page 1 of 1

New Sub Zone
Please enter the new sub zone information

Country: All Countries

Zone: All Zones

6. Select the geographic Country and Zone (state) that you want to include in this tax zone. For example, select Country: United States, and Zone: California.
7. Press the Insert button to add the geographic zone.
8. Press the Back button to return to the Tax Zones list.

Tax Classes

Tax classes allow you to define one or more types of taxes to charge for your products. For example, you could create a tax class called "Sales Tax" to charge state sales tax.

To create a new Tax Class, do the following:

1. Under Locations/Taxes, click on the "Tax Classes" menu
2. Click on the "New Tax Class" button.
3. Fill out the Tax Class Form:

- ◆ Tax Class Title: example "Sales Tax"
 - ◆ Description: example "States sales tax"
4. Press the Insert button to save your new tax class.

Tax Rates

Tax rates allow you to charge different tax percentages based on the tax zone that the customer is located in. Define a tax rate for each tax zone that you created.

To create a new Tax Class, do the following:

1. Under Locations/Taxes, click on the "Tax Rates" menu.
2. Click on the "New Tax Rate" button.
3. Fill out the Tax Class Form:
 - ◆ Tax Class Title: select from the list of tax classes
 - ◆ Tax Zone: select from the list of tax zones
 - ◆ Tax Rate: enter the percentage tax to charge
 - ◆ Description: enter a description for this rate
 - ◆ Priority: use this option to configure compounding rates. Otherwise, set this to "1".
4. Press the Insert button to save your new tax rate.

Tax Rates				
Priority	Tax Class	Zone	Tax Rate	Action
1	Sales Tax	Florida	7%	ⓘ
0	Sales Tax	California	8%	ⓘ
0	Sales Tax	Oregon	5%	ⓘ
Displaying 1 to 3 (of 3 tax rates)				Page 1 of 1

Reports

The Reports section allows you to view various reports about the activity in your store. The following reports are available:

Report	Description
Products Viewed	Displayed a list of the number of times each of your products has been viewed by a customer (or shopper). Sorted in descending order, with the most frequently viewed product listed first.
Products Purchased	Displays a list of the total number of times each of your products has been purchased
Customer Orders-Totals	Displays a list of your customers and the total dollar volume of their purchases. Customers are sorted by volume in descending order.

Tools

The Tools section provides some general tools to manage your store and customers. The following tools are available:

Send Email

This option allows you to send an email to a customer or a group of customers. For example, you can send an email to a customer updating them with information about their orders, or you could send an email newsletter to all customers who subscribed to the newsletter.

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Field	Description
Customer	Select the customer or group of customers to send the email to.
From	Enter the email address from which this email will be sent
Subject	Enter a subject for the email
Message	Enter the content of the email.

When complete, press the Send Mail button to send the email.

Who's Online

This option displays current real-time activity in your shopping cart / store. A report is displayed listing all active users and their last activity. The following information is displayed for each customer:

Field	Description
Online	Amount of time they have been shopping
ID	Unique userID for the customer
Full Name	Name of the customer. "Guest" indicates that the customer has not registered.
IP Address	The network address of the customer
Entry Time	The time that the customer first entered the shopping cart.
Last Click	The time that the customer last clicked on an item or function within the cart.
Last URL	The last page that the customer viewed
Users Shopping Cart	The contents of the customer's shopping cart.

Who's Online							
Online	ID	Full Name	IP Address	Entry Time	Last Click	Last URL	Users Shopping Cart
00:00:05	0	Guest	172.20.0.3	16:34:42	16:34:42	/demo1/shopping_cart.php	1 x Clown Fish
Currently there are 1 customers online							Subtotal \$9.95

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