

CartXpress User's Guide



CartXpress Powered by osCommerce is an **online shop e-commerce** solution. It features “**out-of-the-box**” installations that allow storeowners to set up and maintain online stores with very little effort. Having osCommerce powering CartXpress provides you with an **open** e-commerce platform, which combines the best in **open-source** solutions.


The **open-source** aspect of osCommerce allows you to be part of an online community of people, who share the same goal of improving your ability to get your products to your customers in an efficient and easy manner. It also allows you to create a presence that will encourage customers to return again and again.

This guide is intended to just “**get you started**” using CartXpress. It is recommended that you print out this guide and use it as you go through the basic process of setting up an online shop. As you go through the process, you will notice many advanced features which will enhance your online presence. These features are documented in the **CartXpress Powered By osCommerce Reference Manual**; as well as on **osCommerce’s support site**. The Reference Manual and osCommerce support site are just a link away; feel free to make use of them as you delve deeper into the osCommerce experience.

Before you can start using CartXpress you must make sure that you have it installed in your Control Panel. To do this, click on your **CartXpress** icon:



Upon clicking on the icon, the screen below will be displayed, click on **Install osCommerce**, a message stating that “*your request was submitted to the server and the operation will be completed within ten minutes*” should appear.


powered by osCommerce

User's Guide
Reference GuideInstall osCommerce

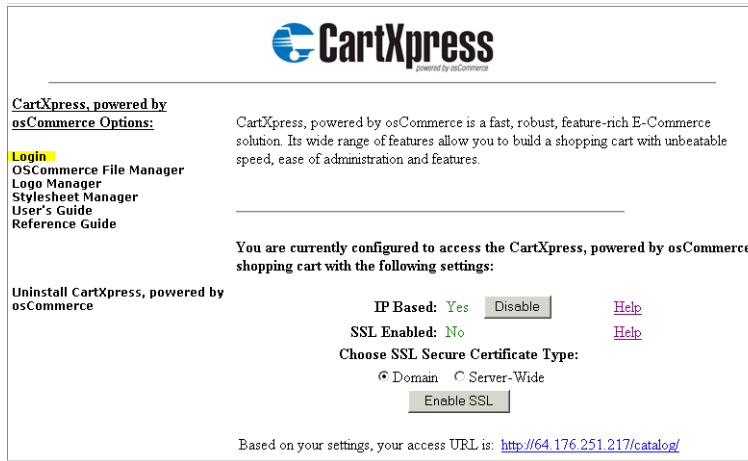
CartXpress, powered by osCommerce is a fast, robust, feature-rich E-Commerce solution. Its wide range of features allow you to build a shopping cart with unbeatable speed, ease of administration and features.

Is SSL enabled on your site? Yes No [Help](#)

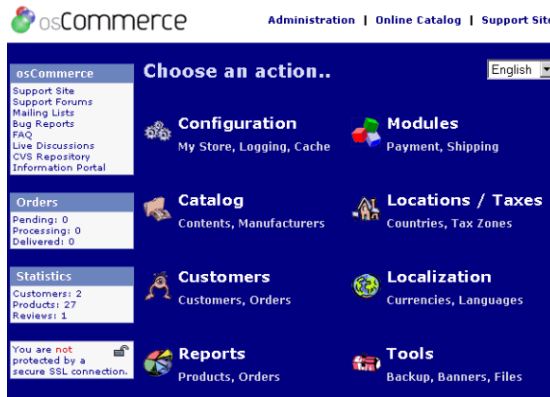
Choose SSL Certificate Type Domain Server-Wide

Access CartXpress by IP Address: Yes No [Help](#)
(example - <http://127.0.0.1/catalog>)

Go back to your Control Panel, wait ten minutes and then click on the CartXpress icon again. You may also refresh your screen to go back to the Control Panel. The following screen should now appear.



From this site click on **Login**, you will be directed to the osCommerce home page below:



For a detailed explanation of all the features on this page, see the *CartXpress Powered By osCommerce Reference Manual* or osCommerce Support Site.

To begin putting your store together click on **Configuration**. You will be prompted for your **User Name** and **Password**. These *should* be the same User Name and Password you used to get into your Control Panel.

The first page you will be sent to is the **My Store** page. This is where you will determine the fields shown on the following screenshot.

My Store

Title	Value	Action
Store Name	Weiner Dog Stuff	▶
Store Owner	Melissa Nelson	ⓘ
E-Mail Address	melissa@wdogstuff.com	ⓘ
E-Mail From	WeinerDogStuff <root@localhost>	ⓘ
Country	United States	ⓘ
Zone	Maryland	ⓘ
Expected Sort Order	desc	ⓘ
Expected Sort Field	products_name	ⓘ
Switch To Default Language	true	ⓘ
Currency		
Send Extra Order Emails To	missy@wdogstuff.com	ⓘ
Use Search-Engine Safe URLs (still in development)	true	ⓘ
Display Cart After Adding Product	true	ⓘ

It is beneficial for you to fill out this form now, as it will give you a basic outline of what you want your site to contain to follow as you go through this guide. To edit the fields click on the (i) symbol next to each field. The fields are listed below:


- **Store name-** The name of “My Store”.
- **Store owner-** The name of “My Store” owner.
- **Email address-** The email address of “My Store” owner.
- **Email from-** The email address used in (sent) emails.
- **Country-** The country orders will be shipped from.
- **Zone-** The zone “My Store” is located in.
- **Expected sort order-** This is the sort order used in the expected products box.
- **Switch to default language currency-** Automatically switch to the language’s currency when it is changed.
- **Send extra order emails to-** Sends extra order emails out.
- **Use search engine safe URLs-** Allows you to determine if you want to use search-engine safe URL’s.
- **Display cart after adding product-** Allows you to determine if you wish to display the cart each time you add a product.
- **Allow guest to tell a friend-** This will give each guest the option of telling a friend about a product.
- **Default search operator-** You may determine the default search operator from this field.
- **Store address and phone number-** The address and phone number you wish to use for the store.
- **Show category counts-** Show recursively how many products there are in each category.

- **Tax decimal place**- Pad the tax value a chosen number of decimal places.
- **Display prices with tax**- Determine whether you want the prices shown to have tax included or not.

These are just the basic configurations that you need to get started. More advanced configurations are listed below. Once again, you may find more information on these configurations in the *CartXpress Powered By osCommerce Reference Manual* or by clicking on the osCommerce Support site. However, you may want to work your way through this guide and go back to these features later, when you wish to make your site more advanced.

- **Minimum values**- Length for first name, last name, etc.
- **Maximum values**- How many address book entries a customer may have, how many special products may be displayed, number of orders in an order history, etc.
- **Images**- Width and height of images, headings, sub-categories, etc.
- **Customer details**- Set values on customer details such as gender, date of birth, company, state etc.
- **Shipping/Packaging**- Set details for country, postal code (zip), weight, etc.
- **Stock**- Check stock levels, allow checkout, re-order etc.
- **Cache**- Set up a cache (a fast storage buffer in a CPU).
- **Email Options**- Determine what email options you want your store to have.
- **Download**- Determine what download options you want your online store to have.
- **GZip Compressor**- Determine if you wish to enable GZip, and at what level.
- **Sessions**- Set up advanced values for online sessions, such as determining IP address, User Agent, etc.

After setting your basic configurations, go through and start setting pages in your store. To do this, you will want to make use of **both** the **osCommerce File Manager** and the **Catalog** section in Administration listed under Configurations. To access the File Manager go back to where you logged in from your Control Panel. In the top left hand corner you will see **osCommerce File Manager**, click on it.



CartXpress, powered by osCommerce Options:

[Login](#)
[OSCommerce File Manager](#)
[Logo Manager](#)
[Stylesheet Manager](#)
[User's Guide](#)
[Reference Guide](#)

[Uninstall CartXpress, powered by osCommerce](#)

CartXpress, powered by osCommerce is a fast, robust, feature-rich E-Commerce solution. Its wide range of features allow you to build a shopping cart with unbeatable speed, ease of administration and features.

You are currently configured to access the CartXpress, powered by osCommerce shopping cart with the following settings:

IP Based: Yes [Help](#)

SSL Enabled: No [Help](#)

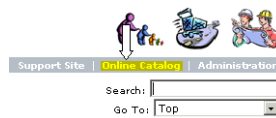
Choose SSL Secure Certificate Type:
 Domain Server-Wide

Based on your settings, your access URL is: <http://64.176.251.217/catalog/>

Clicking on osCommerce File Manager will open the file manager shown below:

File Manager	
account.inc	conditions.inc
contact_us.inc	cookie_usage.inc
index.inc	info_shopping_cart.inc
login.inc	logoff.inc
password_forgotten.inc	product_info.inc
product_reviews.inc	product_reviews_info.inc
product_reviews_write.inc	products_new.inc
shipping.inc	

This is where you will start seeing what your store will look like, you may flip back and forth between the File Manager and Catalog section in Administration; or click on **Online Catalog** from many of the pages you will be working with.



As mentioned earlier in this manual, many of these fields are advanced and this guide will simply go through the basic steps. For more details on the advanced features, see the *CartXpress Powered By osCommerce Reference Manual* or the osCommerce support site.

From the File Manager you will be able to view the following:

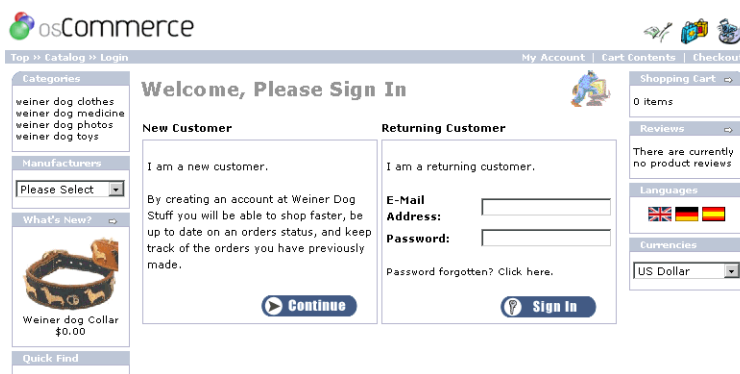
- **account information**- Information about a customer's account with your store.
- **contact us**- A page that will allow customers to contact your store.
- **index**- The entrance to your store.
- **login**- Where customers log into your store's site.
- **forgotten password**- Information about what to do if your customers lose their password
- **product review**- Allows you to place reviews of products on your site.
- **write product reviews**- Allows customers to write and send you reviews of your products.
- **shipping**- This is where you may list your store's shipping options.
- **conditions**- This is where you list your terms of usage information.
- **cookie usage**- Information on your site's use of cookies.
- **shopping cart information**- Information on how to use your site's shopping cart.
- **logoff**- This is where a customer logs off your site once they have finished shopping in your store.

- **product information**- This is where you change and update information on your products
- **product review information**- Allows product review information to be entered.
- **new products**- This is where you add products you wish to be categorized as “new” to your store’s site.

You may eventually wish to get familiar with, and use all of the above features to produce your site; but to get your site up and running you should concentrate on the following features.

- **login**
- **password forgotten**
- **product information/index**
- **new products**
- **shopping cart information**
- **payment**
- **shipping**
- **log off**

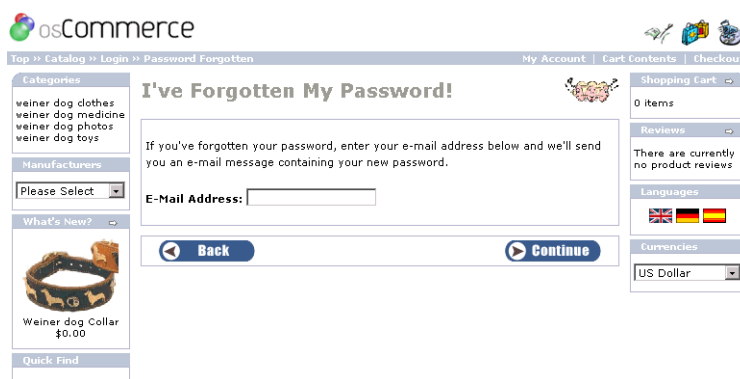
To start off your store’s website, it is probably best to begin at the beginning, or at least your customer’s beginning, the login section. This is done in the **login.inc** portion of the File Manager.



The login.inc portion of the File Manager is important even to the most basic online commerce site, as it allows customers to begin shopping in your store. To begin enter information in the following fields:

- **Navbar title-** This is the portion of the page that tells the customer where they are at in the site. May use default setting.
- **Heading title-** This is the title of the heading, for example in the screenshot above it says “*Welcome, Please Sign in.*” May use default setting.
- **Heading new customer-** This is the heading above where new customers sign in.
- **Text new customer-** This is the text a new customer will see, informing them they will move through the site as a new customer.
- **Text new customer introduction-** This is the text new customers will see inviting them to log into your store’s site.
- **Heading returning customer-** This is the heading above where returning customers sign in.
- **Text returning customer-** This is the text returning customers will see when they log into your store’s site.
- **Text password forgotten-** This is the text you will use to inform customers on what to do if they have forgotten their password (you will need to do more with this below in the password forgotten section).
- **Text login error-** This is the text you will use to inform a customer that have made an error in logging in.
- **Text visitors cart-** This is the text you will customize for a visitors shopping cart. Once you have filled out all of these fields, click **Submit**. Your browser will automatically go back to the File Manager.

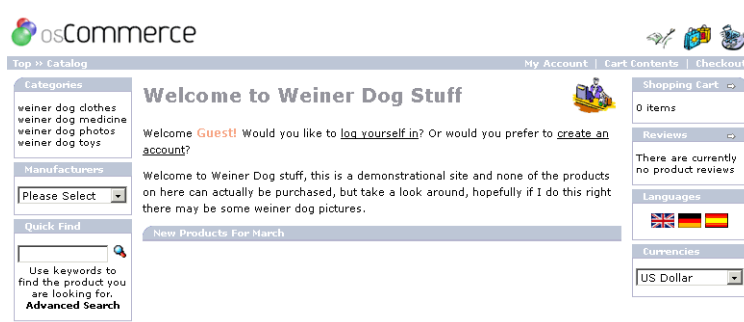
Many of the fields above will have default settings you can use. Once you fill them out, you need to fill out the fields in the **password forgotten inc.** section shown below.



The following fields need to have information entered in them, so that customers may retrieve their password information.

- **Navbar title one-** This is the navigational bar that tells the customer what part of the site they are at.
- **Navbar title two-** This is the part of the navigational bar that tells the customer they are in the *Password Forgotten* section.
- **Heading title-** This is the title of the main heading of the page; for example, in the screenshot it is *I've Forgotten My Password!*
- **Text Main-** This is the text you will use to inform your customers about what to do if they have forgotten their password.
- **Text no email address found-** The text you will use to inform your customers that you were not able to find their email address while searching for their password will be entered here.
- **Email password reminder subject-** This is the text you will put in to have the customer come up with an email reminder.
- **Email password reminder body-** The body of the text of the reminder email.
- **Success password sent-** This is what you send out when you find the password. Once you have filled out all these fields, click on **Submit**.

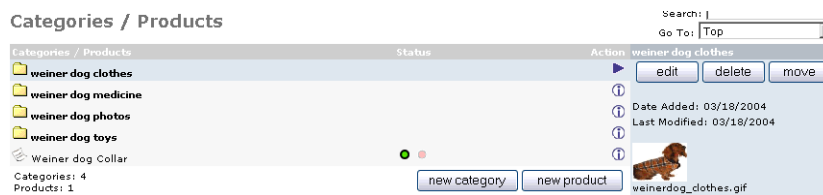
Now you can start entering products into your online store. To do this, you will be working with the **index** and **product information** sections of the File Manager; as well as the **Catalog** section osCommerce Administration. The index section of the File Manager is called **index.inc**.



From this page you are able to determine the look and feel of your entrance page. By going to the **Text Main** heading on this page, you may enter text that will welcome your customers to the site. Once you have done this, click **Submit**. Once you have clicked *Submit* your browser will automatically go back to the File Manager. To see if the heading is the way you want it, click on *index.inc* again, the screen should refresh with your new heading. For example, in the screenshot above

the “Welcome to Weiner Dog Stuff” was set in the **Text Main** field. For information on what else is covered in this section, check out the File Manager section of the *CartXpress powered by osCommerce Reference Manual*, or osCommerce’s support site.

Once you have determined how you wish to welcome your customers to your site, you will need to determine what products you would like them to see. To do so, go back to Administration, (you may need to re-login) and click on **Catalog**.



This section will allow you to **add** or **edit** the following:

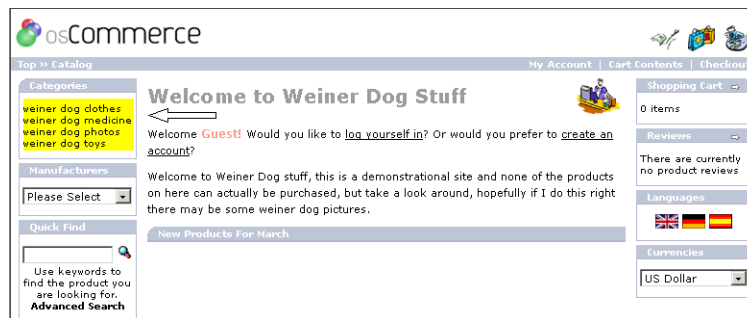
- **Categories/Products**
- **Products Attributes**
- **Manufacturers**
- **Reviews**
- **Specials**
- **Products Expected**

For now you should concentrate on **Categories** and **Products**.

To add a new category, click on the **new category** button. A new box will open as shown in the screenshot below:



Enter the name of the category and an image to display for it and click on **save**. If you wish, you may go back to the File Manager index.inc and see if it looks the way you want it to on your site.



Any new categories that you have added should now appear in the Categories section of your welcome page.

To add **products** to your site, click on the **new product** button. This will open up the page shown below:

Products Status: In Stock Out of Stock

Date Available: (YYYY-MM-DD)

Products Manufacturer:

Products Name:

Tax Class:

Products Price (Net):

Products Price (Gross):

Products Description:


To enter a product, you must fill out the following fields:

- **Products Status**- In stock, or out of stock.
- **Dates Available**- Click the arrow and a calendar will appear; choose the date from the calendar.
- **Products Manufacturer**- Pick the name from the drop-down box that appears.
- **Products Name**- Enter the name in whatever language you wish it to appear. To choose the language, find the country's flag that corresponds with it. For example, to


enter a name in English, enter it in the field that appears next to the British “Union Jack” flag.

- **Tax Class**- This is a drop-down box with the choices of **none** and **taxable goods**.
- **Products Price (net)**-
- **Products Price (gross)**-
- **Products Description**- Enter a description of the product in this field; the language you will use is once again determined by a country flag, i.e., the Union Jack for English.
- **Products Quantity**-
- **Products Model**-
- **Products Price**-
- **Products Image**- You use the browse button to search your computer for the image file.
- **Products URL**- Do not enter **http://** in the field, start with **www**. Once again, choose the language by the country flag.
- **Products weight**-

Once you have entered all the information, you may preview the products placement on your site by clicking on **Preview**.

 **Weiner dog Collar** \$0.00

A beautiful leather collar for your favorite weiner dog. Your weiner dog will be envy of all the dogs in the dog park in this collar.




This product will be in stock on Friday 19 March, 2004.

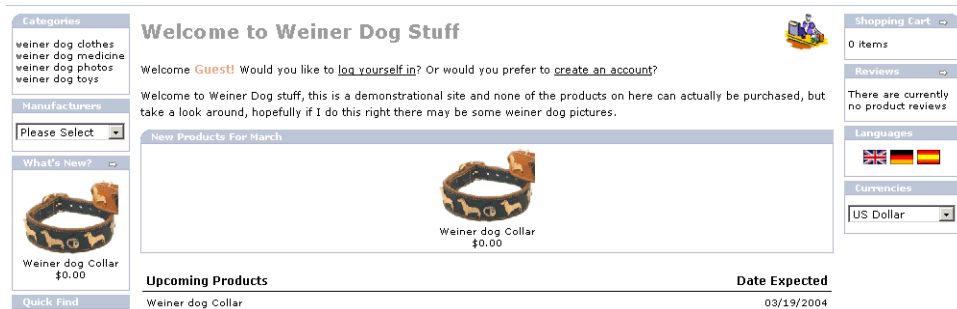
If you are satisfied with the products placement click on **Insert**.

Categories / Products

Search: Go To:

Categories / Products	Status	Action	Weiner dog Collar
<ul style="list-style-type: none">weiner dog clothesweiner dog medicineweiner dog photosweiner dog toys		<ul style="list-style-type: none">editdeletemovecopy to	<ul style="list-style-type: none">Date Added: 03/13/2004Date Available: 03/19/2004
<ul style="list-style-type: none">Weiner dog Collar	● ● ●	<ul style="list-style-type: none">new categorynew product	<ul style="list-style-type: none">leather_collar.gifPrice: \$0.00Quantity: 23Average Rating: 0.00%

Follow the directions above for each product you wish to enter. To preview the finished product go back to your File Manager or click on Online Catalog. The new products should now appear on your site.



Once you have set up most of the products and categories you wish to have in your store you may want to classify some products as “new products”.



To set products as new products, go to the **products_new.inc** section of the File Manager. For each product you wish to appear as a new product fill in the following fields:

- **navigation title**
- **heading title**
- **text date added**- The date the product was added.
- **text manufacturer**- This is information you wish to add about the manufacturer.
- **text price**

Once you have entered all the information above, click **Submit**. Repeat this process for each product you wish to appear as new.

The next thing you need to determine is what information you wish to tell customers about your shopping cart options.

Visitors Cart

Every visitor to our online shop will be given a 'Visitors Cart'. This allows the visitor to store their products in a temporary shopping cart. Once the visitor leaves the online shop, so will the contents of their shopping cart.

Members Cart

Every member to our online shop that logs in is given a 'Members Cart'. This allows the member to add products to their shopping cart, and come back at a later date to finalize their checkout. All products remain in their shopping cart until the member has checked them out, or removed the products themselves.

Info

If a member adds products to their 'Visitors Cart' and decides to log in to the online shop to use their 'Members Cart', the contents of their 'Visitors Cart' will merge with their 'Members Cart' contents automatically.

To inform your customers of their shopping cart options, as in the above screenshot, go to the File Manager and click on **info_shopping_cart.inc**. Fill out the heading and sub-heading fields and you will personalize the descriptions of your shopping carts, to say whatever you wish them to say.

To make sure that your carts, or anything else that you have added up to this time, is correct go back to Administration and click on Catalog. This will give you the opportunity to make sure your site is looking the way you want it to look.

To track your customers and orders go back into the Administration site and click on **Customers**. This will open up the following page:

Customers				Search:
Last Name	First Name	Account Created	Action	Barnabas von Dukart
von Dukart	Barnabas	03/18/2004	edit delete orders email	

Displaying 1 to 1 (of 1 customers) Page 1 of 1

From this page you will have the option to edit your customers information. To do so, click **edit**, and fill out the following form:

Customers

Personal

Gender: Male Female

First Name: * Required

Last Name: * Required

Date of Birth: * Required

E-Mail Address: * Required

Company

Company name:

Address

Street Address: * Required

Suburb:

Post Code: * Required

City: * Required

State:

Country:

Contact

Telephone Number: * Required

Fax Number:

Options

Newsletter:

Once you have entered all the information, click **update**. You may also **delete** the customer's information from here; as well as keep track of all their **orders**, and send them email.

Send Email To Customers











Customer:

From:

Subject:

Message:

You will also need to set up payment methods for your site's store. Log in to Administration and click on **Modules**. This will open up the **Payment Modules**

Modules	Sort Order	Action
Authorize.net	0	
Credit Card	0	
Cash on Delivery	0	
iPayment	0	
Check/Money Order	0	
NOCHEX	0	
PayPal	0	
2CheckOut	0	
PSiGate	0	
SECPay	0	

From this module you may **install**, **remove**, or **edit** the following payment gateways. Click **install** next to the **(i)** by any of the payment gateways to install it:

- **Authorize.net**- Click **edit** to enable the authorize.net module, to enter a login name (you get this from Authorize.net) enter your transaction key (you get this from Authorize.net), enter your transaction mode (testing or production), Transaction method (credit card or e-check), customer notifications, payment zone, set order status, set order of display. Click **update** for the changes to take effect, and click **remove** to remove the Authorize.net option.
- **Credit cards**- Click **edit** to enable the credit card module and accept credit cards. Split credit card email address, select a payment zone, set order status and sort order of display. Click **update** for changes to take effect. Click **remove** to remove the option to accept credit cards.
- **Cash on delivery**- Click **edit** to enable the Cash on Delivery module, select the payment zone, set order status, and sort order of display. Click **update** for changes to take into effect. Click **remove** to remove the Cash on Delivery option.
- **iPayment**- Click **edit** to enable iPayment option, enter your iPayment account number (you get this from iPayment), your iPayment user ID (you get this from iPayment) your iPayment user password (you get this from iPayment), select the currency you wish to use with iPayment (either US Dollar or the Euro or both), set your payment zone, set the order of display. Click **update** for these changes to take effect. Click **remove** to remove the iPayment option.
- **Check/Money Order**-Click **edit** to enable the “*make check payable to*” message; as well as the “*your order will not be shipped until we receive payment*” message, enable check/money order module, payment zone, set order status, set order of display. Click **update** for changes to take effect. Click **remove** to remove the check/ money order option.
- **NOCHEX**- This requires GBP (Great Britain Pound) currency. Click **edit** to enable the NOCHEX module, to list the email address you use for NOCHEX, to select a

payment zone, to set order status and set order of display. Click **update** for changes to take effect. Click **remove** to remove the NOCHEX module.

- **PayPal**- Click **edit** to enable the PayPal module, email address, select the currency you wish to use for credit card transactions, select a payment zone, set order status, set order of display. Click **update** for changes to take effect. Click **remove** to remove PayPal option.
- **2Checkout**- Click **edit** to enable the 2Checkout module, enter your login/store number for 2Checkout (you receive this from 2Checkout), determine your transaction mode (test or production), merchant notification (should 2Checkout email a receipt to the store owner), payment zone, set order status, sort order of display. Click **update** for changes to take place. Click **remove** to remove 2Checkout option.
- **PSiGate**- Click **edit** to enable the PSiGate module, enter your PSiGate merchant ID (get this from PSiGate) transaction mode, transaction type, credit card collection, payment zone, set order status, and set order of display. Click **update** for changes to take effect. Click **remove** to remove the PSiGate module.
- **SECPay**- Click **edit** to enable SECPay module, SECPay merchant ID (you receive this from SECPay) transaction currency, transaction mode, payment zone, set order status, and sort order of display. Click **update** for changes to take effect. Click **remove** to remove SECPay option.

To add shipping information, go to Administration and click on **Shipping** under Modules.

Shipping Modules		Sort Order	Action	Flat Rate
Flat Rate		0		<input type="button" value="remove"/> <input type="button" value="edit"/>
Per Item		0		
Table Rate		0		Flat Rate
United Parcel Service		0		Enable Flat Shipping
United States Postal Service				True
Zone Rates				Shipping Cost 5,00
				Tax Class --none--
				Shipping Zone --none--
				Sort Order 0

From this module you will be able to **install**, **edit**, and **remove** the following. To add any of the shipping modules, click **install** next to the (i) by each name:

- **flat rate**- Click **edit** to change the option to offer a flat rate, shipping cost, tax class, shipping zone, and sort order. Click **update** for any changes to take effect. Click **remove** to remove the flat rate option.

- **per item**- Click **edit** to enable item shipping, change the shipping cost, handling fee, tax class, shipping zone, and sort order. Click **update** for any changes to take effect. Click **remove** to remove this option.
- **table rate**- Click **edit** to enable the table rate method, to change the charges on the shipping table, to determine the table by either size or weight, handling fees, tax class, shipping zone, and sort order. Click **update** for changes to take effect. Click **remove** for table rate option to be removed.
- **United Parcel Service**- Click **edit** to enable UPS shipping, determine UPS pickup method, determine whether or not you want UPS packaging, if it is a residential or business delivery, the handling fee, tax fee, shipping zone, and sort order by display. Click **update** for the changes to take effect. Click **remove** for the UPS option to be removed.
- **United States Postal Service**- To use this feature, you need to have an account with the United States Post Office. To set up this account go to www.uspsprioritymail.com/et_regcert.html

Note: *The US Post Office expects you to use pounds as your measurement of weight.*

Once you have this account set up, click on **Install**. Once the account is set up and the module is installed, click on **edit** to enable US Post Office shipping, enter your USPS user name and your USPS password (these were given to you when you set up your account). You may also determine which server to use (test or production), determine the handling fee, tax class, shipping zone, and sort order. Click **update** for changes to take effect. Click **remove** to remove the US Post Office as a shipping option.

- **zone rates**- Click on **edit** to enable the zones method, determine the tax class, and sort order; as well as zone countries, shipping tables, and handling fees. Click **update** for the changes to take effect. Click **remove** to remove the zone rates option.

After setting up the payment and shipping modules, you will also want to set up the **Order Totals** module.

Order Total Modules

Modules	Sort Order	Action	Total
Low Order Fee	4	(i) Display Total Do you want to display the total order value?	<input type="radio"/> true <input type="radio"/> false
Shipping	2	(i)	
Sub-Total	1	(i)	
Tax	3	(i)	
Total	4	(i)	

Sort Order
Sort order of display.
4

- **low order fee**- Allows you to determine if you wish to add a few to low orders, click on **install** and then click **yes** or **no**. If yes, determine the fee and click **update**.
- **shipping**- Click **edit** to determine if you wish to display the order shipping total and sort order; to determine if you wish to allow free shipping, or give free shipping for orders over a certain amount, or to a set destination. Click **update** for changes to take effect. Click **remove** for this shipping option to be removed.
- **sub-total**- Click **edit** to determine if you want to display sub-total and sort order. Click **update** for changes to take effect. Click **remove** to remove sub-total option.
- **tax**- Click **edit** to determine whether or not you wish to display the order tax value and sort order. Click **update** for the changes to take effect. Click **remove** for this option to be removed.
- **total**- Click on the **(i)** to determine whether you want to display the total order value and sort order. Click on **update** for any changes to take effect.

Once you have finished setting the modules for payment, shipping and orders you will want to leave a customized message for your customers when they log out of your store. To do this, go back into your File Manager and click on **logoff.inc**.



Enter what you wish to say in the **Text Main** field.

Now that you have made it through this User's Guide, you should have a very basic online shop. CartXpress will allow you to grow this site into as big or small of a store as you wish. Feel free to read through the *CartXpress Powered by osCommerce Reference Manual* and visit osCommerce's Support Site, both of which can be reached by the links in Administration, and will assist you in the future and continued growth of your e-commerce presence.